



Please note: The website is currently in Beta meaning we are still improving and testing the website. These instructions are for Beta mode and are subject to change as we improve the site and add new features. Thank you. Updated 8.28.23

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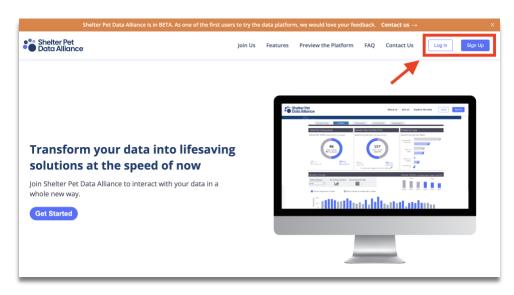
- Creating an account and organization profile in Shelter Pet Data Alliance
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- Creating New Records Manual Reporting
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### Creating an account and organization profile in Shelter Pet Data Alliance

You will need to designate one person to create the organization profile. This person will log in first, create their admin account, create the organization profile, and then invite additional admins and/or users to join.

Please follow **all** these steps to create the initial administrator account and organization profile. *See the Adding Additional Administrators and New Users section of this document for more information.* 

- 1. In your internet browser, type **shelterpetdata.org** in the address bar.
- 2. Click Sign Up on the upper right corner of the page.



- 3. Enter your email address and create a password.
- 4. Click Verify Account.

| Shelter Pet Data Alliance is in BETA. As one of th  | e first users to try the data platform, we would love your feedback. Contact us $\rightarrow \qquad $ |
|---|--|
| Shelter Pet<br>Data Alliance  | Join Us Features Preview the Platform FAQ Contact Us Log in Sign Up  |
| <b>Transform your data into life</b><br><b>solutions at the speed of now</b><br>Join Shelter Pet Data Alliance to interact with your da<br>whole new way.<br><b>Get Started</b> | Sign Up   Terrore stand potentiate and   Conscillagibility potentiate and     Password*    Confirm Password*    wry koom*      wry koom*   |

5. Review and agree to the Shelter Pet Data Alliance Terms and Conditions of Use. You must scroll to the bottom of the agreement to see the **Agree** button.

| Shelter Pet<br>Data Alliance | Join Us Features Preview the Platform FAQ Contact Us Sign Up   |
|------------------------------|--|
| whole new w                  | any of the choice of law provisions thereof. Each party hereby irrevocably submits to the personal jurisdiction of the state and federal<br>courts located within Salt Lake City, Utah with respect to any claim or dispute arising out of the Terms and Conditions and waives any<br>objection to jurisdiction and venue in such courts. In the event an action or proceeding is brought by any party to enforce or construe<br>the Terms and Conditions, the party that prevails by enforcing the Terms and Conditions shall be entitled to recover, in addition to all<br>other amounts and relief, its reasonable costs and attorneys' fees incurred in connection with such action or proceeding. |
|                              | Waiver and Severability  |
|                              | No waiver by the Company of any term or condition set out in these Terms and Conditions shall be deemed a further or continuing<br>waiver of such term or condition or a waiver of any other term or condition, and any failure of the Company to assert a right or<br>provision under these Terms and Conditions shall not constitute a waiver of such right or provision.  |
| thats automation we          | provision under these Lettins and conditions shall not constitute a waiver of such right or provision.<br>If any provision of these Terms and Conditions is held by a court or other tribunal of competent jurisdiction to be invalid, illegal, or<br>unenforceable for any reason, such provision shall be eliminated or limited to the minimum extent such that the remaining provisions<br>of the Terms and Conditions will continue in full force and effect.  |
|                              | Entire Agreement   |
|                              | The Terms and Conditions and our Data Privacy and Management Policy constitute the sole and entire agreement between you and<br>Company regarding the Website and supersede all prior and contemporaneous understandings, agreements, representations, and<br>warranties, both written and oral, regarding the Website.  |
|                              | Cancel   |
| 246                          | Explore your data in a platform designed for you. Easily navigate  |

- 6. Check your email inbox for the verification email and click on Verify Email Address
- 7. You will be automatically directed back to the website. DO NOT STOP HERE
- 8. Click on Log In and input your username (email) and the password you created in step 3, then click Log In.
- **9.** On the **Create an account** page, the first six fields will be used to create **your administrator** account. Please fill in all required fields.

| Shelter Pet Data Alliance is in BE  | TA. As one of the first users to try the data platform | n, we would love your feedback | . Contact us $\rightarrow$ |            |
|---|--|--------------------------------|----------------------------|------------|
| Shelter Pet<br>Data Alliance  | Join Us  | Features Preview the Pla       | atform FAQ                 | Contact Us |
|   |  |                                |                            |            |
|   |  |                                |                            |            |
| Create an accou   | nt   |                                |                            |            |
| To create your profile, fill out the information be<br>cats and/or dogs is welcome to register. | low. Any agency or organization with intake and outc   | ome data for                   |                            |            |
| All fields marked with an * are required fields   |  |                                |                            |            |
| Your Information  |  |                                |                            |            |
| First Name*   | Last Name*   |                                |                            |            |
|   |  |                                |                            |            |
| Job Title*  | Primary Phone  |                                | Ext.                       |            |
|   |  |                                |                            |            |
| Secondari Frazil  | Casandar: Dhana  |                                | Ext.                       |            |
| Secondary Email   | Secondary Phone  |                                | EXL.                       |            |
|   |  |                                |                            |            |

- **10.** The **Organization Information** section will be used to create your organization profile. Begin by entering your Employer Identification Number (**EIN**) in the EIN field.
  - Your organization may already be in our system. If it is, your EIN has been verified, and typing in your EIN will automatically populate the Organization Name, Address and Organization Type fields. It will also populate the Phone Number, Organization Website, and Organization Email fields if we have that information on file. Organizations with verified

EIN's will have immediate access to all their prior shelter data we have in our system. Any new data entered or uploaded into Shelter Pet Data Alliance, will be available on the Manage Data and Reporting tabs within four hours of uploading it.

b. If you enter your EIN and the Organization Name, Address, and Organization Type fields remain blank, your EIN will have to go through a verification process. Please manually enter information for all required fields. If your organization has an unverified EIN, you can still manually enter or upload data, but it will stay in pending status until Shelter Pet Data Alliance staff have verified your EIN. Once you receive email notification that your organization has been verified, any data you've entered or uploaded will be available on the Manage Data and Reporting tabs within four hours of uploading it.

| Shelter Pet<br>Data Alliance  | Join Us Features Preview the Platform FAQ Contact Us |
|---|--|
| Organization Information<br>Enter your EIN. If it's in our database, some of the form fields will auto-populat<br>populated fields during sign-up, but you can edit them from your Organization |  |
| EIN*<br>Ex: 123456789 or 12-3456789   | Organization Name*                                   |
| Street Address 1*   | Street Address 2                                     |
| City*   | State * Select                                       |
| Zip Code*   | Phone Number* Extension                              |
| Organization Type * 💿<br>Select 🗸   | Organization Website                                 |
| Organization Date Founded *   | Organization Email*                                  |

- **11.** Read and agree to the data privacy and management policy and the authorization to act on behalf of an organization.
- 12. Click Complete registration.

| -   | Organization Email*  |
|---|--|
| Animal Data Tracking Method   | Social Media Address   |
| Select  | Referring Organization   |
| Select  | Select V   |
| Agreement for Shelter Det Date Allies   | ance   |
| Agreement for Shelter Pet Data Allia  |  |
| <ul> <li>Yes, I have read and agree to the data privacy.</li> </ul>   | y and management policy  |
| <ul> <li>Yes, I have read and agree to the data privacy.</li> <li>Yes, I am authorized to act on behalf of the org</li> </ul> | ganization and have read, understand, and agree to the terms and conditions on behalf of the organization. I agree |
| <ul> <li>Yes, I have read and agree to the data privacy.</li> <li>Yes, I am authorized to act on behalf of the org</li> </ul> |  |

### Congratulations!

Your initial administrator account and organization profile have been created.

# **Adding Additional Administrators and New Users**

If you have administrator level access in Shelter Pet Data Alliance, you will be able to add additional admins and users by following these steps.

- 1. Log in to your Shelter Pet Data Alliance account.
- 2. On the left side menu, click Manage Users.
- 3. Click the blue Add User button on the right side of the screen.

| Shelter Pet<br>Data Alliance                                      |                                 |                                |                           |               | ٢                          |
|---|---------------------------------|--------------------------------|---------------------------|---------------|----------------------------|
| ۵ Home  | Manage                          | Add User                       | Last Name*                |               |                            |
| A Manage Users  Manage Data  Reporting                            | Organiz                         | Primary Email*                 | Confirm Primary Email*    | -             | At Add User                |
| <ul> <li>Reporting</li> <li>One Alliance</li> <li>Help</li> </ul> | Name<br>Kayla Rid<br>Test Direc | Job Title                      | Secondary Email           | ogin<br>/2023 | Account Setup  • Completed |
|   |                                 | Primary Phone Number Extension | Secondary Phone Extension |               |                            |
|   |                                 | Select Role * ③                | -                         |               |                            |
|   |                                 | Admin<br>User                  | Add                       |               |                            |
|   |                                 |                                |                           |               |                            |

- 4. In the Add User window, complete all required fields.
- 5. Select Role.
  - Please note, both the user and admin roles have access to upload data, create new records, view Reporting, and export data from Manage Data.

## **Opting-In to Automatic Data Sharing Through Your Shelter Management Software**

The below instructions currently apply to users of Chameleon, PetPoint, and ShelterBuddy. We are working on the process for automatic data uploading. Users of **PetPoint**, automatic data sharing is live and your data will be available as they systems sync daily. Users of **ShelterBuddy** who have already turned-on automatic data sharing in Shelter Pet Data Alliance, your data will be available in your account in 1 to 2 months. As soon as it is available, we will notify you via email. In the meantime, if you'd like to utilize the current reporting features with your most recent data, you may choose to upload monthly data manually.

1. Once logged into your account, click on your **Profile** in the upper right corner. Note that you must be an Admin to follow these steps.

- 2. Click on the Advanced Settings tab.
- **3.** Under the **Automatic Data Updates Opt-in** section, click on the link for **Terms and Conditions**. Scroll to the bottom of the Terms and Conditions window and accept the terms by clicking the Agree button.

| Shelter Pet<br>Data Alliance |   | 2                    |
|------------------------------|---|----------------------|
| ක Home                       | Profile Details   | Profile<br>←I Logout |
| A Manage Users               | Your Profile Organization Profile Advanced Settings   |                      |
| 🎟 Manage Data                |   |                      |
| 너 Reporting                  | Manage Multiple Locations   |                      |
| 灸 One Alliance               | Multiple locations are for an organization with multiple brick-and-mortar locations that report intake and outcome<br>data for each individual location.  |                      |
| © Неір                       | By enabling this function, you are indicating your organization has multiple brick-and-mortar locations that report<br>intake and outcome data separately for each location, rather than aggregating your data. If this is the case, you will<br>need to submit data for each location under the Manage Data tab. If you disable this function, you must mark those<br>locations, except your primary location, inactive. |                      |
|                              | Disabled Multiple Locations   |                      |
|                              | Automatic Data Updates Opt-in   |                      |
|                              | Please read and agree to the Terms and Conditions before you proceed  |                      |
|                              | Automatic Data Updates  |                      |
|                              | -   |                      |

- 4. Next, choose your Shelter Management System from the dropdown menu.
- 5. Enter the required fields that display, then click **Confirm**.
  - Note: If you do not know what the values are for the fields of your SMS, you will need to go into the settings of your SMS account or contact your SMS directly for support.

| ••• Shelter Pet<br>•• Data Alliance |   | 2         |
|-------------------------------------|---|-----------|
|                                     |   | Profile   |
| ක Home                              | Automatic Data Updates Opt-in           | ←I Logout |
| 은 Manage Users                      | You have agreed to Terms and Conditions |           |
| 🆩 Manage Data                       | Automatic Data Updates                  |           |
| ⊯ Reporting                         | Shelter Management System 🕥             |           |
| 鳧 One Alliance                      | ShelterBuddy V                          |           |
| ℗ Help                              | endpointUrl                             |           |
|                                     | userName                                |           |
|                                     | password                                |           |
|                                     |   |           |
|                                     | Confirm                                 |           |

6. If your credentials were entered correctly, you will receive a success message from the system. If you receive an error message, verify the information you provided and click Confirm again.

### **PetPoint**

-

Please complete the following steps **in PetPoint** to finish the opt-in process for data sharing. If you have any questions or run into any issues, please <u>contact PetPoint support</u> directly for assistance.

- 1. The user can go to the Admin options
- 2. Then the user must look for the Online Animal listing options in the Setup column.

| ntake | Outcome     | Edit   | Care | PPTN | Services | Schedule | Licensing        | Finance    | Case | Reports | Admin | Support |
|-------|-------------|--------|------|------|----------|----------|------------------|------------|------|---------|-------|---------|
| Admi  | inistrative | Option | 15   |      |          |          |                  |            |      |         |       |         |
|       |             |        |      |      |          | 2        | Setup            |            |      |         |       |         |
|       |             |        |      |      |          |          |                  |            |      |         |       |         |
|       |             |        |      |      |          |          |                  |            |      |         |       |         |
|       |             |        |      |      |          |          |                  |            |      |         |       |         |
|       |             |        |      |      |          |          |                  |            |      |         |       |         |
|       |             |        |      |      |          |          |                  |            |      |         |       |         |
|       |             |        |      |      |          |          |                  |            |      |         |       |         |
|       |             |        |      |      |          |          |                  |            |      |         |       |         |
|       |             |        |      |      |          |          |                  |            |      |         |       |         |
|       |             |        |      |      |          |          |                  |            |      |         |       |         |
|       |             |        |      |      |          | 0.00     |                  | - Ostana d | ~    |         |       |         |
|       |             |        |      |      |          |          | ne Animal Listin | o Obions   | ~    |         |       |         |
|       |             |        |      |      |          |          |                  |            |      |         |       |         |
|       |             |        |      |      |          |          |                  |            |      |         |       |         |
|       |             |        |      |      |          |          |                  |            |      |         |       |         |
|       |             |        |      |      |          |          |                  |            |      |         |       |         |
|       |             |        |      |      |          |          |                  |            |      |         |       |         |

**3.** Then they must click on the **Shelter Pet Data Alliance** tab and agree to the terms mentioned in the tab by clicking on the checkbox and then click submit to enable the data sharing.

|   |  | censing Finance Case Reports Admin  | Support                 |
|---|--|---|-------------------------|
| Online Animal Listing Op  | tions  |   |                         |
|   |  |   |                         |
|   |  |   |                         |
|   |  |   |                         |
| isplayed Fields   |  |   |                         |
|   |  | Shelter Pet Data Alliance   |                         |
|   |  |   |                         |
| Do you agree to share your  | r animal data to Shelter Pet Data Alliance             | By clicking on this checkbox, you are agreeing to the   | e terms mentioned below |
| ncrease transparency across the inc   |  | form through the website www.shelterpetdata.org. The g<br>form priorities and lifesaving decision-making. Best Frier<br>flware renorming animals a shelters |                         |
| What Does This Mean?<br>With your agreement, Pethealth Sen<br>he present, to be used by Best Frier<br>OrgID   | vices (USA) Inc. will synchronize the following pe     | t data, taken in by your shelter at the point of adoption st  | arting from begining to |
| What Does This Mean?<br>With your agreement, Pethealth Sen<br>he present, to be used by Best Frier<br>OrgID<br>Company Name<br>Site Name (Intake Site)  | vices (USA) Inc. will synchronize the following pends. |   | arting from begining to |
| What Does This Mean?<br>With your agreement, Petheath Sen<br>he present, to be used by Best Frier<br>OrgID<br>Company Name<br>Site Name (Intake Site)<br>State/Province (via Company Addin<br>ZupPostal Code (via Company Addin<br>Animal ID<br>Animal ID | vices (USA) Inc. will synchronize the following pends. |   | arting from begining to |
| What Does This Mean?<br>With your agreement, Pethealth Sen<br>he present, to be used by Best Frier<br>OrgID<br>Company Name   | vices (USA) Inc. will synchronize the following pends. |   | arting from begining to |
| What Does This Mean?<br>With your agreement, Pethealth Sen<br>he present, to be used by Best Frier<br>Org/D<br>Company Name<br>Site Arame (Intake Site)<br>Site Province (via Company Add<br>Zip/Potal Code (via Company Add<br>Animal Tpo<br>Sex         | vices (USA) Inc. will synchronize the following pends. |   | arting from begining to |

#### Chameleon

There are no further steps you need to take at this time. 24Pet in the process of setting up automatic data sharing for Chameleon users. Organizations using Chameleon are being contacted for one-on-one setup by 24Pet. Until your data is sharing automatically, please manually upload your data.

#### **ShelterBuddy**

If you did not provide us with your ShelterBuddy API credentials in the opt-in form, please watch for an email from SPDA. That email will contain a link so you can provide your API credentials in a secure form. Remember, please be sure you contact <u>support@shelterbuddy.com</u> and request API access to your ShelterBuddy account. If you prefer, you can also call ShelterBuddy at (781) 583-3400.

### **Creating New Records – Manual Reporting**

#### Manually enter Monthly Data:

- 1. On the left side menu, click Manage Data.
- 2. Manage Data will open on the Monthly Data tab first.

| Shelter Pet<br>Data Alliance    |                   |             |      |             |             |                 | ٩                   |
|---------------------------------|-------------------|-------------|------|-------------|-------------|-----------------|---------------------|
| ය Home                          | Manage            | Data        |      |             |             |                 |                     |
| A Manage Users                  | Monthly Data      | Annual Data |      |             |             |                 |                     |
| Manage Location     Manage Data | Select Location   | a 🗇         |      |             |             |                 |                     |
| i≝ Reporting                    | Best Friends Anim |             | · ·  |             |             |                 |                     |
|                                 | Manage Mo         | onthly Data |      |             |             | 👌 Upload Record | + Create New Record |
| <sup>®</sup> Help               | T Filter          |             |      |             |             |                 |                     |
|                                 | •                 | Month       | Year | Data Source | Data status | Last Modified   | Export              |
|                                 | •                 | May         | 2023 | Web Portal  | Completed   | 6/14/2023       | ċ                   |
|                                 | 0                 | April       | 2023 | Web Portal  | Completed   | 6/14/2023       | ¢                   |
|                                 | •                 | March       | 2023 | Web Portal  | • Completed | 6/14/2023       | ż                   |

3. Click the **Create New Record** button located on the right side of the screen.

| Shelter Pet   |  |             |      |             |             |                 | ٩                   |
|---|--|-------------|------|-------------|-------------|-----------------|---------------------|
| <ul> <li>Q: Home</li> <li>A: Manage Users</li> <li>O: Manage Location</li> <li>I: Manage Data</li> <li>I:: Reporting</li> </ul> | Manage<br>Monthly Data<br>Select Location<br>Best Friends Anim | Annual Data |      |             |             |                 | Ļ                   |
| 年 One Alliance  | Manage Mo  | nthly Data  |      |             |             | t Upload Record | + Create New Record |
| © Help  | T Filter   |             |      |             |             |                 |                     |
|   | •  | Month       | Year | Data Source | Data status | Last Modified   | Export              |
|   | 0  | May         | 2023 | Web Portal  | • Completed | 6/14/2023       | ځ                   |
|   | •  | April       | 2023 | Web Portal  | • Completed | 6/14/2023       | ÷                   |
|   | •  | March       | 2023 | Web Portal  | • Completed | 6/14/2023       | ؿ                   |

4. Populate all relevant fields with data for the **month** you selected.

| • Shelter Pet<br>• Data Alliance   |   |              |                      |   |            |                                      |             |                  | ٩                   |
|--|---|--------------|----------------------|---|------------|--------------------------------------|-------------|------------------|---------------------|
| බ Home<br>A Manage Users   | Manage I  |              |                      |   |            |                                      |             |                  |                     |
| Manage Location     Manage Data     Location     Location     Menormal Alliance     Help | Select Location<br>Best Friends Anim<br>Manage Mo | Il Sanctuary | Select Lo<br>Best Fr | re enterii<br>cation<br>iends Ani<br>onth * |            | r Best Friends Animal San<br>tuary v |             | 1. Upload Record | + Create New Record |
|  |   | Month        | 05/202               | 2023  |            |                                      |             | Last Modified    | Export              |
|  |   | May          | Jan<br>Apr           | Feb<br>May                                  | Mar<br>Jun |                                      | Create      | 6/14/2023        | ځ                   |
|  |   | April        | Jul<br>Oct           | Aug<br>Nov                                  | Sep<br>Dec | Web Portal                           | * Completed | 6/14/2023        | ځ                   |
|  |   | March        |                      | 2023  |            | Web Portal                           | Completed   | 6/14/2023        | Ł                   |

5. Click the Submit Record button at the bottom of the screen.

The monthly record you created will appear on the Manage Monthly Data list with a data status of pending.

• Please note, if your EIN has been verified, the data status will change to complete within four hours of submitting it. If you've created a new record before the EIN verification process is complete, the record will remain in pending status until you receive the email notification that your EIN is verified. Any data you have submitted will change to complete within four hours of receiving the EIN verification email and any future data you submit will change to complete within four hours of submitting it.

#### Manually enter Annual Data:

- 1. On the left side menu, click Manage Data.
- 2. Click the Annual Data tab and your list of annual records.
- 3. Click the Create New Record button located on the right side of the screen.

| Shelter Pet<br>Data Alliance   |  |             |             |               | (2)                 |
|--|--|-------------|-------------|---------------|---------------------|
| A Home A Manage Users Manage Location Manage Location Manage Data L: Reporting A One Alliance O Help | Manage Do<br>Monthly Data<br>Select Location (<br>Best Friends Animal 5<br>Manage Annu | Annual Data | ×           |               | + Crosia New Record |
|  | T Filter   | Year        | Data status | Last Modified | Export              |
|  | •  | 2022        | • Completed | 6/3/2023      | ځ                   |
|  | 0  | 2021        | . Completed | 6/2/2023      | ÷                   |

- 4. Populate all relevant fields with data for the year you selected.
- 5. Click the **Submit Record** button at the bottom of the screen.

The annual record you created will appear on the Manage Annual Data list with a data status of pending.

# **Creating New Records - Uploading CSV Files**

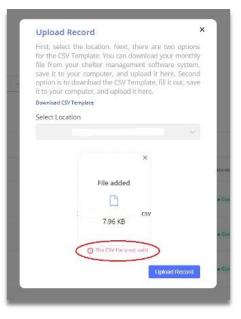
If your shelter management software has a "Shelter Animals Count" report, please follow these steps for uploading CSV files.

- **1.** Using your "Shelter Animals Count" report, export monthly CSV files from shelter management software.
- 2. In Shelter Pet Data Alliance, on the left side menu, click Manage Data.
- **3.** Select the **Monthly Data** tab.
- 4. Click the Upload Record button located on the right side of the screen.
- 5. In the Upload Record window, click Select File.
- 6. Locate the CSV file you saved to your computer during step 1.
- 7. Click the **Upload Record** button at the bottom of the screen.

| Shelter Pet<br>Data Alliance                  |                       |  | ~   |  |                                       |               | 2                 |
|---|-----------------------|--|---|--|---------------------------------------|---------------|-------------------|
| ක Home<br>පී Manage Users                     | Manage<br>Annual Data |  | for the CSV Templa<br>file from your she<br>save it to your cor                           | cation. Next, there are tw<br>ste. You can download you<br>lter management softwar<br>mputer, and upload it her  | r monthly<br>re system,<br>re. Second |               |                   |
| Manage Location     Manage Data     Reporting |                       | on ③<br>imal Sanctuary<br>fonthly Data | It to your compute<br>Download CSV Templat<br>O Please select location<br>Select Location | and the CSV Template, fill i<br>r, and upload it here.<br>e<br>before uploading the file<br>nds Animal Sanctuary |                                       | Upload Record | Create New Record |
| 永 One Alliance<br>③ Help                      | T Filter              |  |   |  |                                       |               |                   |
|   |                       | Month                                  |   | Select a file<br>SV file size no more<br>than 10M8<br>Select File  | s<br>sted                             | Last Modified | Export            |
|   |                       | February                               |   | Uplos  | id Record                             | 3/13/2023     | ٤.                |
|   |                       | january                                | 2023  | Web Portal   | Completed                             | 3/13/2023     | ف                 |

The monthly record(s) you uploaded will appear on the Manage Monthly Data list with a data status of pending.

### **Trouble shooting Error Message:**



### Please note:

**Correct file formatting:** 

An error may be happening because some reports are aggregating data a certain way which causes 1,12 to be in the month column of the file. At this time, you can only upload one month of data at a time.

|    | А         | В            | С       |
|----|-----------|--------------|---------|
| 1  | Record Ye | Record Month | Species |
| 2  | 2022      | 1            | canine  |
| 3  | 2022      | 1            | feline  |
| 4  | 2022      | 2            | canine  |
| 5  | 2022      | 2            | feline  |
| 6  | 2022      | 3            | canine  |
| 7  | 2022      | 3            | feline  |
| 8  | 2022      | 4            | canine  |
| 9  | 2022      | 4            | feline  |
| 10 | 2022      | 5            | canine  |
| 11 | 2022      | 5            | feline  |
| 12 | 2022      | 6            | canine  |

### **Incorrect file formatting:**

|   | Α         | В            |
|---|-----------|--------------|
| 1 | Record Ye | Record Month |
| 2 | 2019      | 1,12         |
| 3 | 2019      | 1,12         |
| 4 | 2019      | 1,12         |
| 5 | 2019      | 1,12         |
| 6 | 2019      | 1,12         |
| 7 | 2019      | 1,12         |
| 8 | 2019      | 1,12         |
| _ |           | 4 40         |

If your organization <u>does not</u> have shelter management software or your shelter management software <u>does not</u> have the option to export CSV files, please follow these steps to upload your data via CSV file.

- 1. On the left side menu, click Manage Data.
- 2. Select the Monthly Data tab.
- 3. Click the Upload Record button located on the right side of the screen.
- 4. Download the CSV template by clicking **Download CSV Template**
- 5. In the template, update the Record Year (column A) and Record Month (column B) to the year and month that corresponds with the data you are reporting. The Beginning Count Date (column BK) and the Ending Count Date (column BN) should be updated to the beginning and end dates of each month you are reporting for that year. Example: Here is what you would enter for January 2022. Column A: 2022; Column B: 1; Column BK: 1/1/2022; Column BN: 1/31/2022.
- **6.** Populate all applicable fields.
- **7.** Save file to your computer.
- 8. In the Upload Record window, click Select File.
- 9. Locate the CSV file you saved to your computer during step 7.
- **10.** Click the **Upload Record** button at the bottom of the screen.

| Shelter Pet<br>Data Alliance                               |                               |              |   |  |            |                     | ٢                 |
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| ක Home   | Manage                        |              |   | <b>d</b><br>cation. Next, there are tr<br>ate. You can download yo   |            |                     |                   |
| <ul><li>糸 Manage Users</li><li>⑥ Manage Location</li></ul> | Annual Data<br>Select Locatio | Monthly Data | save it to your co<br>option is to downli<br>it to your compute | elter management softwa<br>mputer, and upload it he<br>oad the CSV Template, fill<br>rr, and upload it here. | re. Second |                     |                   |
| Manage Data     Keporting                                  | Best Friends Ani              |              | Select Location   | before uploading the file  | _          |                     |                   |
| Ջ One Alliance   | Manage M                      | onthly Data  | Best Frie   | nds Animal Sanctuary   |            | L Upload Record + C | Create New Record |
| ③ Help   | T Filter                      | ]            |   |  |            |                     |                   |
|  |                               | Month        |   | Select a file<br>CSV file size no more<br>than 10M8  | í.         | Last Modified       | Export            |
|  |                               | March        | $\rightarrow$   | Select File  | sted       | 4/14/2023           | ±                 |
|  |                               | February     |   | Uplo   | ad Record  | 3/13/2023           | Ł                 |
|  |                               | January      | 2023  | Web Portal   | Completed  | 3/13/2023           | ځ                 |

The monthly record(s) you uploaded will appear on the Manage Monthly Data list with a data status of pending.

## **Modifying Data**

These instructions will help you modify an incorrect record. Please note, the record must be in completed status before you can make any changes. The process to change from pending to completed usually takes around 4 hours after the data is submitted.

- **1**. Log in to your Shelter Pet Data Alliance account.
- 2. On the left side menu, select Manage Data.

**3.** If you need to update a *monthly* record, select the **Monthly Data** tab. If you need to update an *annual* record, select the **Annual Data** tab.

| ••• Shelter Pet<br>•• Data Alliance   |  |             |             |               | (2)                 |
|---|--|-------------|-------------|---------------|---------------------|
| © Home<br>A Manage Users<br>© Manage Location<br>■ Manage Data<br>Reporting | Manage De<br>Monthly Data<br>Select Location (<br>Best Friends Animal S<br>Manage Annu | Annual Data | ×           |               | + Create New Record |
| <ul> <li>R One Alliance</li> <li>Ø Help</li> </ul>                          | <b>T</b> Filter  | Year        | Data status | Last Modified | Export              |
|   | 0  | 2022        | Completed   | 6/3/2023      | . के                |
|   | 0  | 2021        | Completed   | 6/2/2023      | ځ                   |

- **4.** Find the record on the list.
- **5.** Click on the record to open it.
- **6.** Click the blue **Edit** button.

| Shelter Pet<br>Data Alliance |   | 6 |
|------------------------------|---|---|
| ක Home                       | Annual Shelter Data   |   |
| 은 Manage Users               | Details   |   |
| Ø Manage Location            | Best Friends Animal Society   |   |
| I Manage Data                | <ul> <li>         In the set of the</li></ul> |   |
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| ⊘ Help                       |   |   |
|                              | 🛣 Live Intake   |   |
|                              | Dog Cat Undesignated 🕥 Total  |   |
|                              |   |   |

- 7. Make any necessary changes.
- 8. When finished with edits, click Submit Record.

**9.** To **EXIT** the screen *without* making changes, select the **Back** button in your browser or click **Manage Data** on the left side menu. A pop-up will appear stating "You will lose all unsaved work. Are you sure you want to leave this page?". Click **OK** to leave without saved changes or click **Cancel** to stay on the page.

The updated record will appear on the list with a data status of pending. It will change to complete within four hours of submitting it.

### Reporting

You may experience a slight delay when clicking between the Incomes and Outcomes on the Reporting tab. Currently, the system doesn't tell you it's working and for a few seconds, it may look like it's not responding. We are working on this and hope to improve it soon.

### Intakes

- 1. On the left side menu, click Reporting
- 2. You will default to the Intakes tab first.
- **3.** On this tab, you will be able to view Monthly Comparisons, Current Year to Date, Gross Intakes, Monthly Trends, and Annual Trends.

| i Home                          | Best Friends Animal Society Best Friends Att Cant Control - Northeast Best Friends Annal Society - Lis Angeles -   |  |
|---------------------------------|--|--|
| Manage Users<br>Manage Location | Intakes Outcomes Level Media: 422023-6122.ME   |  |
| Manage Data                     | Monthly Comparisons         Current Year to Date         Gross Intakes by Type           Reporting Period   warn 2023         Reporting Period   Howron visual for details.         Reporting Period   2023         D  |  |
| Reporting                       |  |  |
| One Alliance                    |  |  |
| Help                            | 200<br>dross intakes<br>Volvi vs Mar 2<br>USAN as Mar 2<br>dross intakes<br>11,6,835<br>dross intakes<br>12,77 vs 2022<br>brows<br>turner<br>turner<br>16,835<br>turner<br>16,835<br>turner<br>16,835<br>turner<br>16,835<br>turner<br>16,835<br>turner<br>16,835<br>turner<br>16,835<br>turner<br>16,935<br>turner<br>16,935<br>turner<br>16,935<br>turner<br>16,935<br>turner<br>16,935<br>turner<br>16,935<br>turner<br>16,935<br>turner<br>16,935<br>turner<br>16,935<br>turner<br>16,935<br>turner<br>16,935<br>turner<br>16,935<br>turner<br>16,935<br>turner<br>16,935<br>turner<br>16,935<br>turner<br>16,935<br>turner<br>16,935<br>turner<br>16,935<br>turner<br>16,935<br>turner<br>16,935<br>turner<br>16,935<br>turner<br>16,935<br>turner<br>16,935<br>turner<br>16,935<br>turner<br>16,935<br>turner<br>16,935<br>turner<br>16,935<br>turner<br>16,935<br>turner<br>16,935<br>turner<br>16,935<br>turner<br>16,935<br>turner<br>16,935<br>turner<br>16,935<br>turner<br>16,935<br>turner<br>16,935<br>turner<br>16,935<br>turner<br>16,935<br>turner<br>16,935<br>turner<br>16,935<br>turner<br>16,935<br>turner<br>16,935<br>turner<br>16,935<br>turner<br>16,935<br>turner<br>16,935<br>turner<br>16,935<br>turner<br>16,935<br>turner<br>16,935<br>turner<br>16,935<br>turner<br>16,935<br>turner<br>16,935<br>turner<br>16,935<br>turner<br>16,935<br>turner<br>16,935<br>turner<br>16,935<br>turner<br>16,935<br>turner<br>16,935<br>turner<br>16,935<br>turner<br>16,935<br>turner<br>16,935<br>turner<br>16,935<br>turner<br>16,935<br>turner<br>16,935<br>turner<br>16,935<br>turner<br>16,935<br>turner<br>16,935<br>turner<br>16,935<br>turner<br>16,935<br>turner<br>16,935<br>turner<br>16,935<br>turner<br>16,935<br>turner<br>16,935<br>turner<br>16,935<br>turner<br>16,935<br>turner<br>16,935<br>turner<br>16,935<br>turner<br>16,935<br>turner<br>16,935<br>turner<br>16,935<br>turner<br>16,935<br>turner<br>16,935<br>turner<br>16,935<br>turner<br>16,935<br>turner<br>16,935<br>turner<br>16,935<br>turner<br>16,935<br>turner<br>16,935<br>turner<br>16,935<br>turner<br>16,935<br>turner<br>16,935<br>turner<br>16,935<br>turner<br>16,935<br>turner<br>16,935<br>turner<br>16,935<br>turner<br>16,935<br>turner<br>16,935<br>turner<br>16,935<br>turner<br>16,935<br>turner<br>16,935<br>turner<br>16,935<br>turner<br>16,935<br>turner<br>16,935<br>turner<br>16,935<br>turner<br>16,935<br>turner<br>16,935<br>turner<br>16,935<br>turner<br>16,935<br>turner<br>16,935<br>turner<br>16,935<br>turner<br>16,935<br>turner<br>16,935<br>turner<br>16,935<br>turner<br>16,935<br>turner<br>16,935<br>turne |  |
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|                                 |  |  |
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|                                 | 2022<br>Apr May Jun Jul Aug Sep Oct Nov Dec Jan Feb Mar  |  |
|                                 | 4,000  |  |

**Outcomes** 

- 1. On the left side menu, click **Reporting.**
- 2. You will default to the Intakes tab first, click on Outcomes tab.
- 3. You can Select a Timeframe from the drop-down menu.
- **4.** The middle box, Lifesaving section, you can choose from the **drop-down menu**, the type of Lifesaving data you wish to view.
- 5. The right end box, Outcomes by Type, you can choose from the drop-down menu, the type of outcome you wish to view.

| ••• Shelter Pet<br>•• Data Alliance |  | 2  |
|-------------------------------------|--|--|
| ක Home                              | Best Friends Animal Society  |  |
| A Manage Users                      | Intakes Outcomes Lawat Behavior 4(22)2023 4-37 C   |  |
| Manage Location                     | Select a Timeframe:  |  |
| III Manage Data                     | Gross Outcomes         Jan-23 to Mar-23         LifeSaVing         Jan-23 to Mar-3         LifeSaVing         Jan-24 to Mar-mark         Outcomes v         Adapton           40, 439<br>Gross Outcomes         40, 439<br>Gross Outcomes         1,1,393 v         31,933 k         See tise 11 ratio         Outcomes v         Adapton         Othe Outcomes v         Adapton         Other Line<br>Outcomes V         Other Line<br>Outcomes V <td< th=""><th></th></td<>   |  |
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|                                     |  |  |

### Help

### If Logged in with Shelter Pet Data Alliance:

- 1. If you have further questions or need assistance, on the left side menu, click Help
- 2. Fill out a Service Request, populate all applicable fields.
- 3. Click Submit.

| ••• Shelter Pet<br>•• Data Alliance  |   |  |
|--|---|--|
| <ul> <li>ペ Manage Users</li> <li>※ Manage Location</li> <li>爾 Manage Data</li> </ul> | Shelter Pet<br>Data Alliance<br>Service Request   |  |
| <ul> <li>☑ Reporting</li> <li>④ One Alliance</li> <li>☑ Help</li> </ul>              | Today's Date * mm/dd/yyyy hhumm.pm Your Name *  |  |
|  | Organization Name *<br>Please provide your fuil organization name. Using abbreviations or<br>acronyms may cause service delays. |  |
|  | Preferred Method of Contact *<br>Please let us know the best way to get in touch with you.                                      |  |

### On the home page, not logged in:

- 1. Click **Contact Us**, at the top right of the main page
- 2. Fill out the Contact Us form, populate all applicable fields.
- 3. Click Submit

