



*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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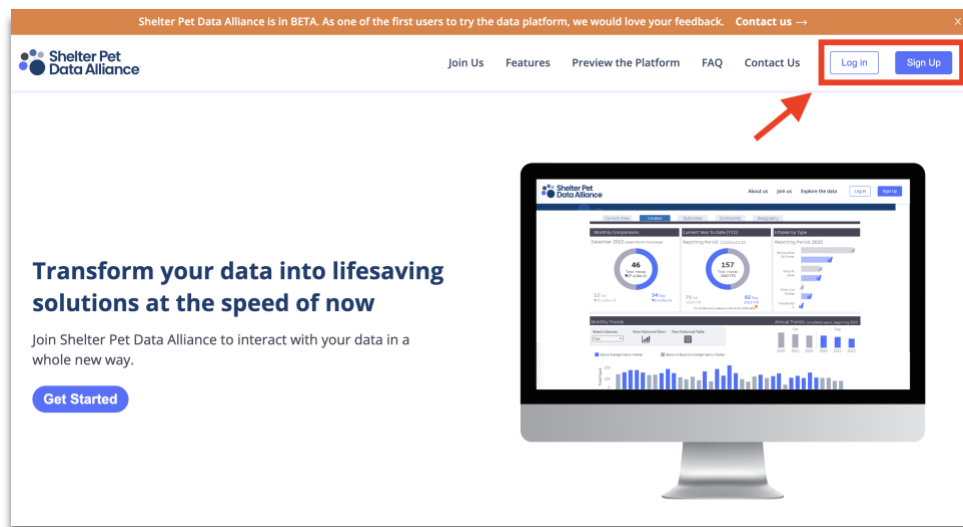
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Creating an account and organization profile in Shelter Pet Data Alliance

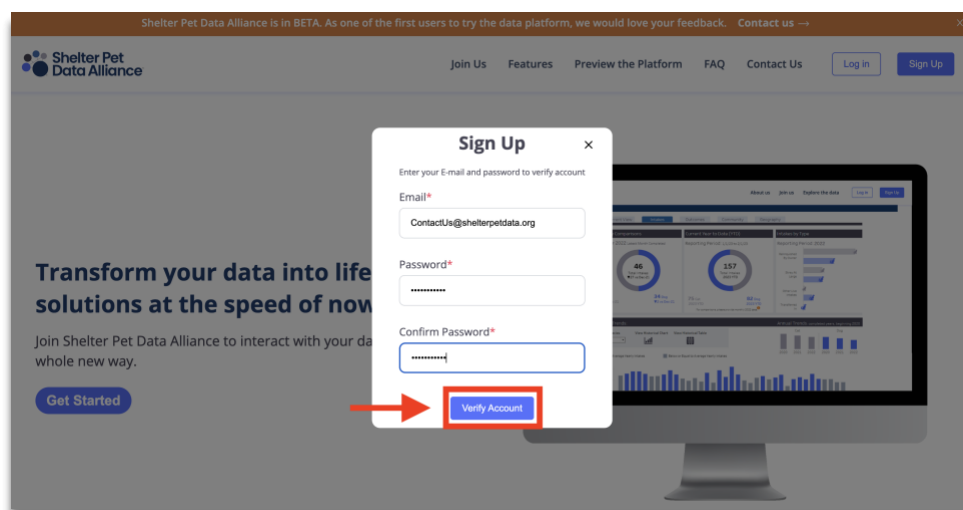
You will need to designate one person to create the organization profile. This person will log in first, create their admin account, create the organization profile, and then invite additional admins and/or users to join.

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.

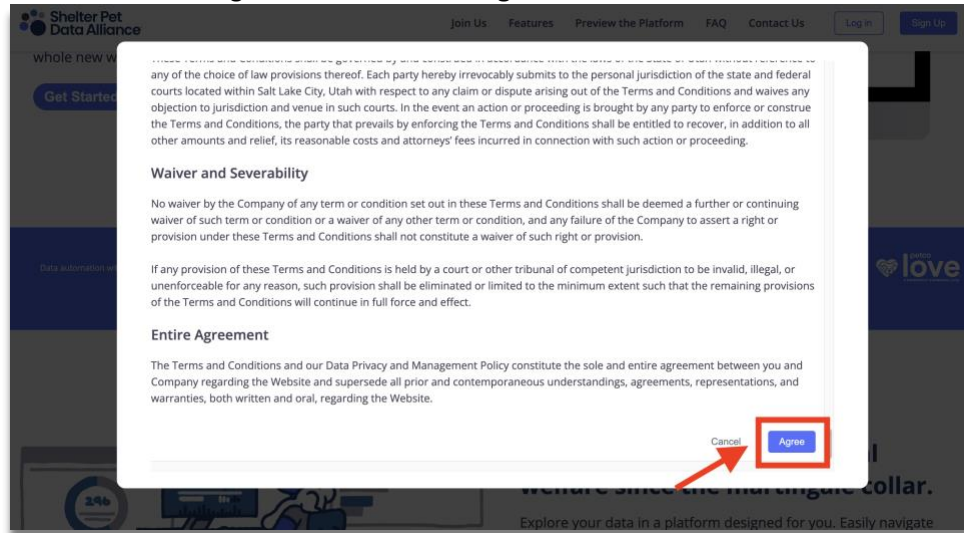
1. In your internet browser, type **shelterpetdata.org** in the address bar.
2. Click **Sign Up** on the upper right corner of the page.



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



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.



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.

A screenshot of the 'Create an account' page on the Shelter Pet Data Alliance website. The page has a white background with a blue header. The main heading is 'Create an account'. Below it, there is a subheading 'Your Information' and a note: 'To create your profile, fill out the information below. Any agency or organization with intake and outcome data for cats and/or dogs is welcome to register.' There is a red note: 'All fields marked with an * are required fields'. The form contains several input fields: 'First Name*', 'Last Name*', 'Job Title*', 'Primary Phone', 'Ext.', 'Secondary Email', 'Secondary Phone', and 'Ext.'. The 'First Name' and 'Last Name' fields are highlighted with a red border.

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.
 - a. 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.

The screenshot shows the 'Organization Information' form on the Shelter Pet Data Alliance website. The form includes fields for EIN, Organization Name, Street Address 1, Street Address 2, City, State (dropdown), Zip Code, Phone Number, Extension, Organization Type (dropdown), Organization Website, Organization Date Founded, and Organization Email. A note at the top states: 'Enter your EIN. If it's in our database, some of the form fields will auto-populate. You will be unable to edit the pre-populated fields during sign-up, but you can edit them from your Organization Profile page in your account.'

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**.

The screenshot shows the 'Agreement for Shelter Pet Data Alliance' form. It includes fields for Organization Date Founded, Organization Email, Animal Data Tracking Method, Social Media Address, How did you hear about us?, and Referring Organization. Below these fields are two checkboxes with red arrows pointing to them: 'Yes, I have read and agree to the data privacy and management policy' and 'Yes, I am authorized to act on behalf of the organization and have read, understand, and agree to the terms and conditions on behalf of the organization. I agree that by clicking this box, my intent is to authenticate this writing and have the same force and effect as a manual signature for purposes of validity, enforceability, and admissibility.' At the bottom right, there is a red box around the 'Complete registration' button, with a red arrow pointing to it.

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.

The screenshot shows the 'Add User' form in the Shelter Pet Data Alliance interface. The form is a modal window with the following fields: First Name*, Last Name*, Primary Email*, Confirm Primary Email*, Job Title, Secondary Email, Primary Phone Number, Extension, Secondary Phone, and Extension. A 'Select Role' dropdown menu is at the bottom, with 'Admin' and 'User' options. A blue 'Add' button is in the bottom right corner. Red arrows point to the 'Manage Users' link in the left sidebar and the 'Add User' button in the background.

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 Data Alliance

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Profile Details

Your Profile Organization Profile **Advanced Settings**

Manage Multiple Locations

Multiple locations are for an organization with multiple brick-and-mortar locations that report intake and outcome data for each individual location.

By enabling this function, you are indicating your organization has multiple brick-and-mortar locations that report intake and outcome data separately for each location, rather than aggregating your data. If this is the case, you will need to submit data for each location under the Manage Data tab. If you disable this function, you must mark those 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

Profile Logout

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.*

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Automatic Data Updates Opt-in

You have agreed to [Terms and Conditions](#)

☒ Automatic Data Updates

Shelter Management System ⓘ

ShelterBuddy

endpointUrl

userName

password

Confirm

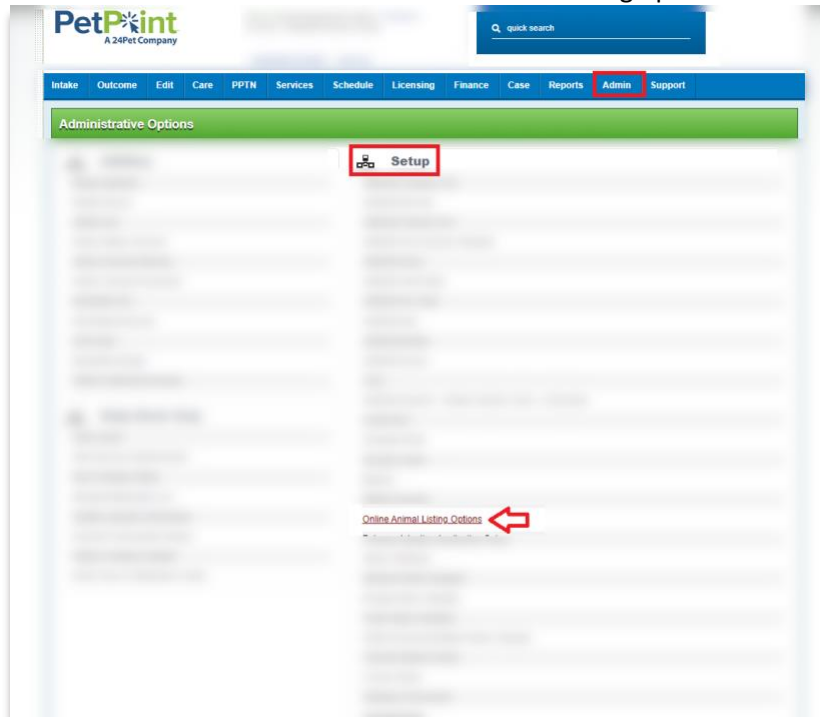
Profile Logout

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.

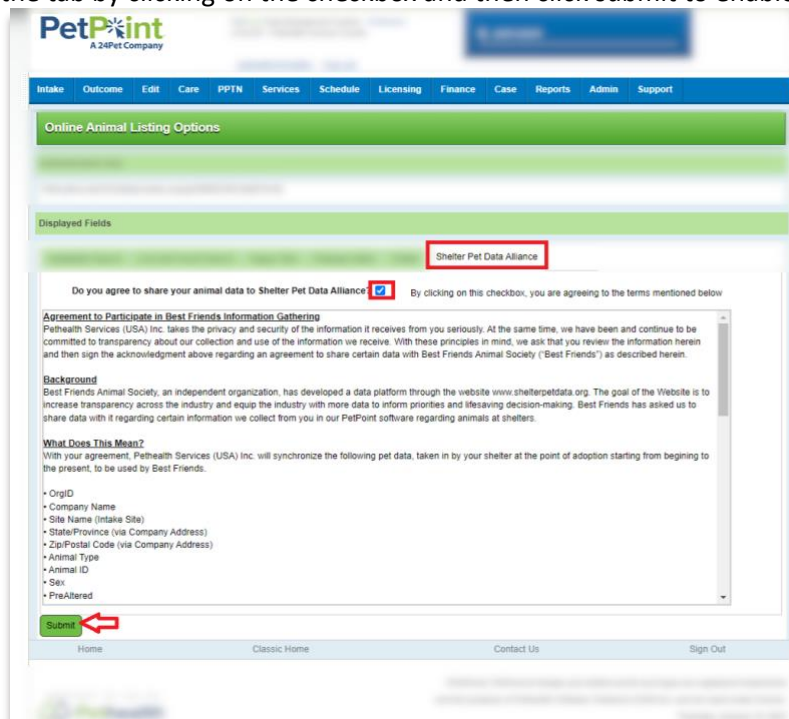
PetPoint

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 [contact PetPoint support](#) 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.



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.



Chameleon

There are no further steps you need to take at this time. 24Pet is 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.

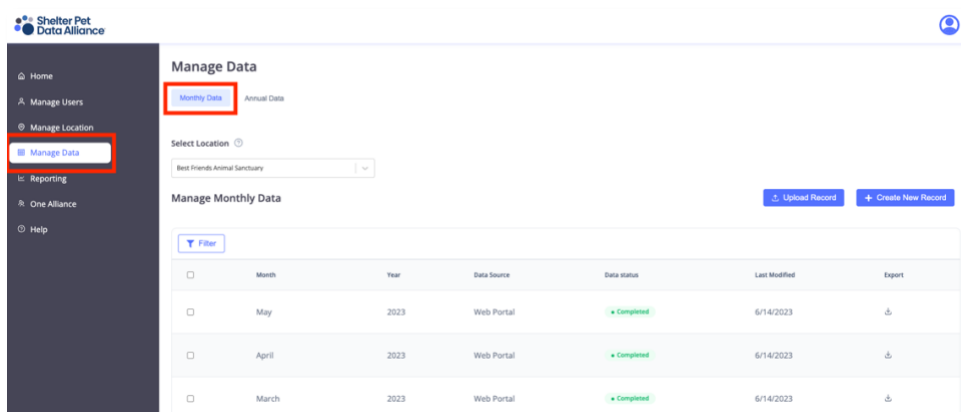
ShelterBuddy

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 support@shelterbuddy.com and request API access to your ShelterBuddy account. If you prefer, you can also call ShelterBuddy at (781) 583-3400.

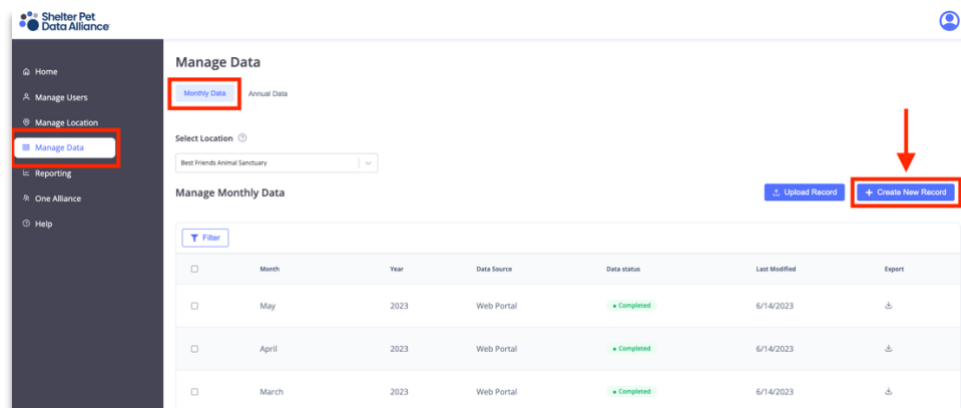
Creating New Records – Manual Reporting

Manually enter Monthly Data:

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



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



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

The screenshot shows the 'Manage Data' interface with the 'Monthly Data' tab selected. A 'Create New Record' modal is open, prompting the user to enter data for 'Best Friends Animal Sanctuary' for May 2023. The modal includes a 'Select Location' dropdown, a 'Select Month' dropdown (highlighted with a red arrow), and a 'Create' button (highlighted with a red box). The background shows a table with columns for 'Month', 'Year', 'Web Portal', 'Data status', 'Last Modified', and 'Export'.

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.

The screenshot shows the 'Manage Data' interface with the 'Annual Data' tab selected. The 'Create New Record' button is highlighted with a red box. The background shows a table with columns for 'Year', 'Data status', 'Last Modified', and 'Export'.

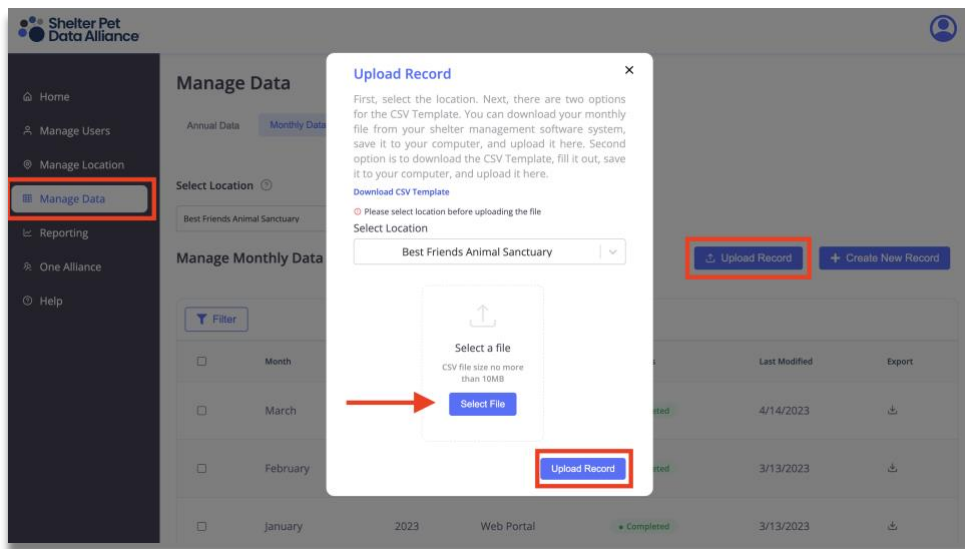
4. Populate all relevant fields with data for the **year** you selected.
5. Click the **Submit Record** button at the bottom of the screen.

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

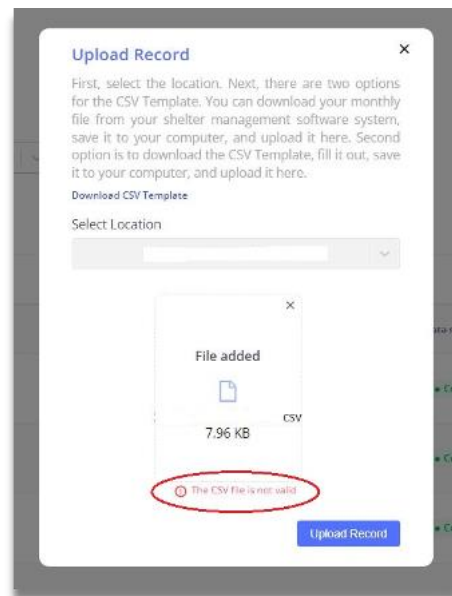
If your shelter management software has a “Shelter Animals Count” report, please follow these steps for uploading CSV files.

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.



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:

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.

Correct file formatting:

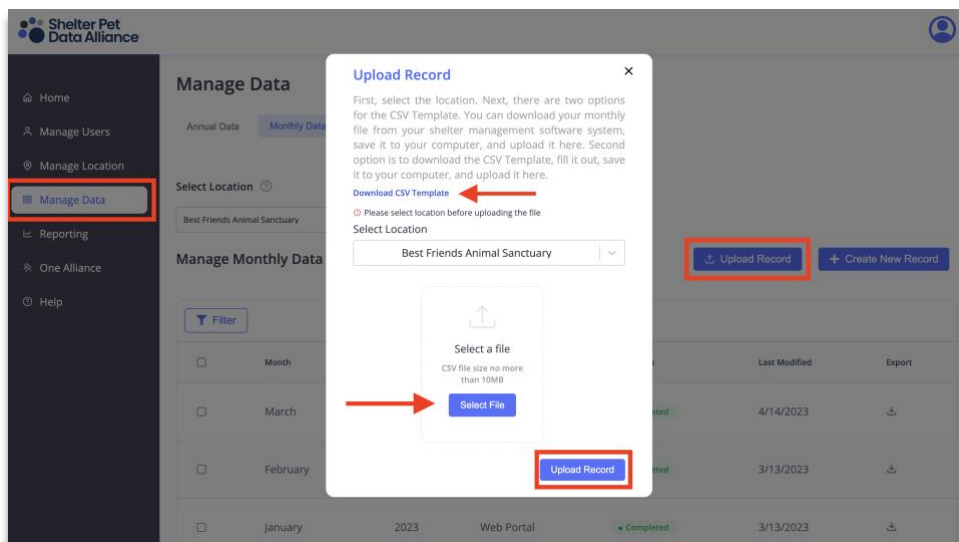
	A	B	C
1	Record Ye	Record Month	Species
2	2022	1	canine
3	2022	1	feline
4	2022	2	canine
5	2022	2	feline
6	2022	3	canine
7	2022	3	feline
8	2022	4	canine
9	2022	4	feline
10	2022	5	canine
11	2022	5	feline
12	2022	6	canine

Incorrect file formatting:

	A	B
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
9	2019	1 , 12

If your organization does not have shelter management software or your shelter management software does not 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.

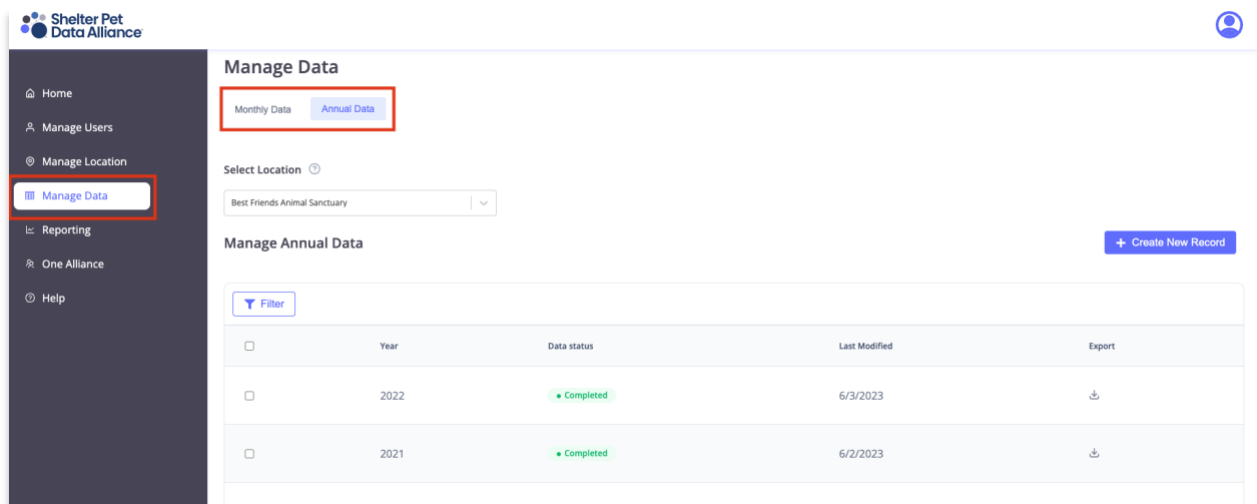


The monthly record(s) you uploaded will appear on the Manage Monthly Data list with a data status of pending.

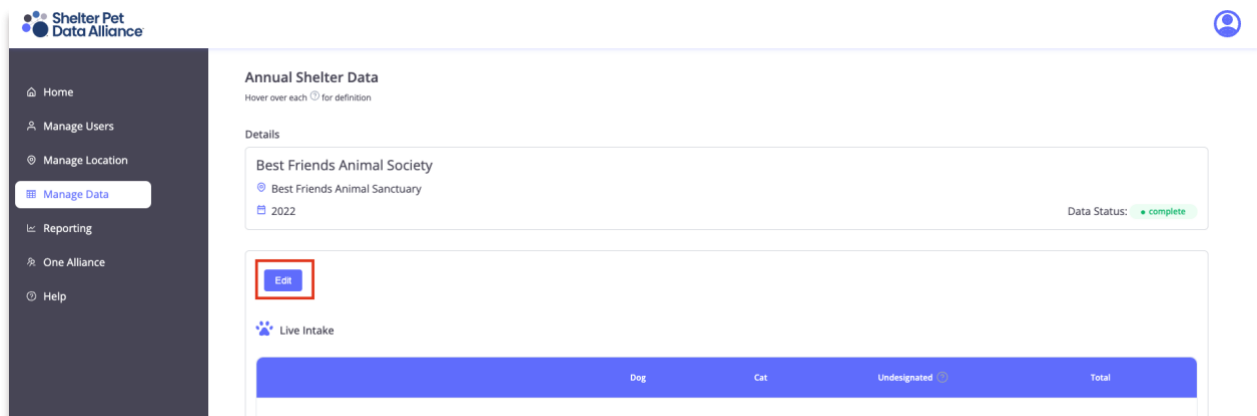
Modifying Data

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.



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



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.

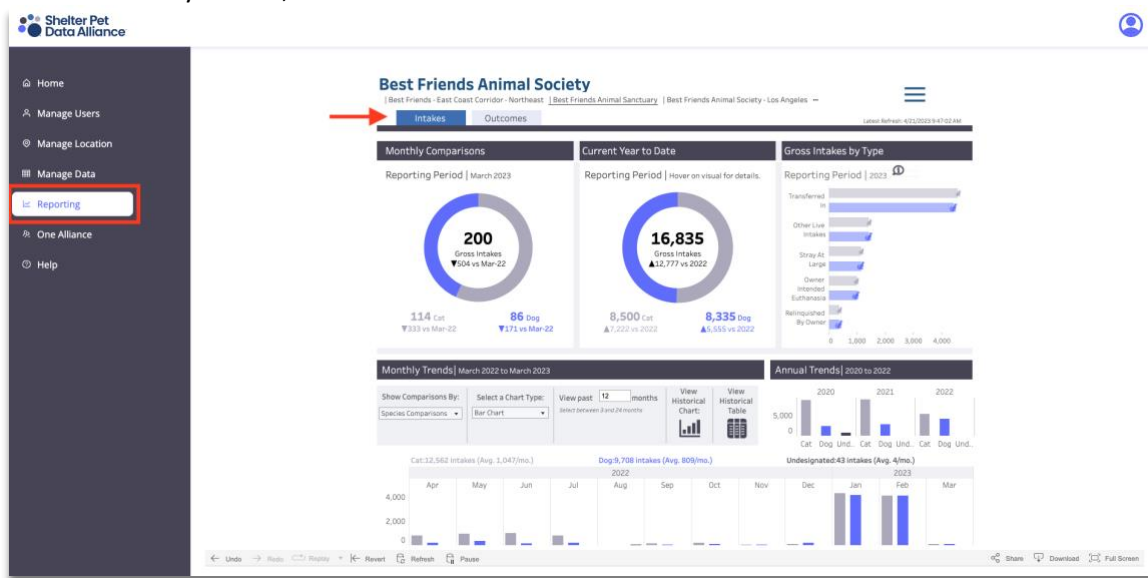
The updated record will appear on the list with a data status of pending. It will change to complete within four hours of submitting it.

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.

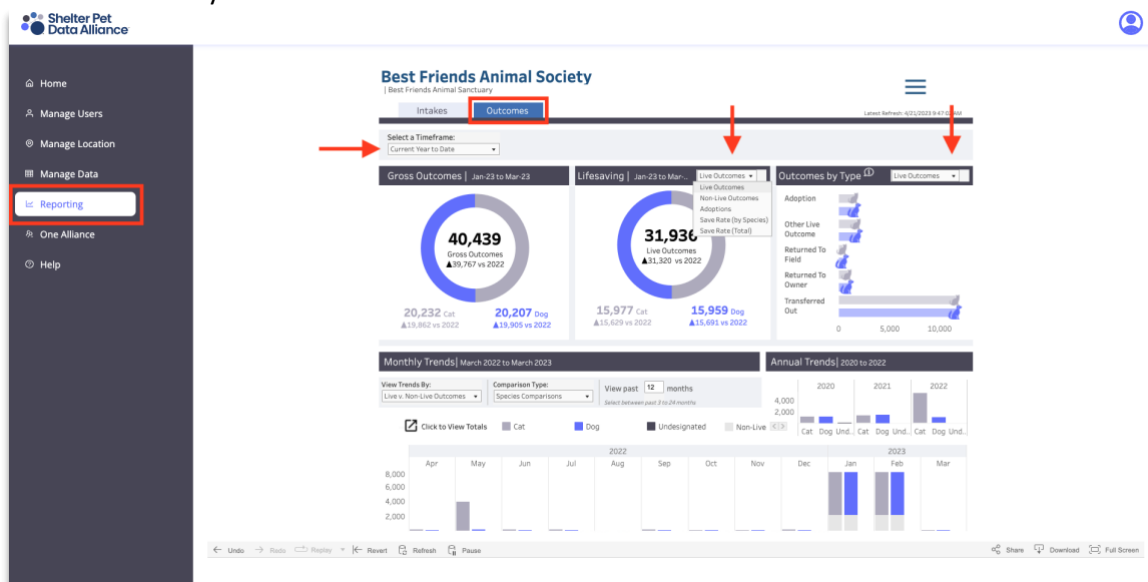
Intakes

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.



Outcomes

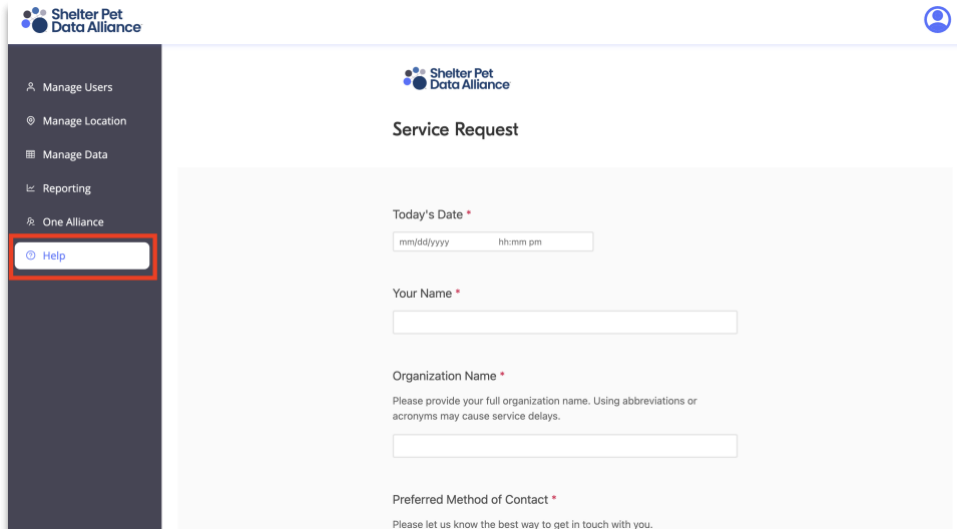
1. On the left side menu, click **Reporting**.
2. You will default to the **Intakes** tab first, click on **Outcomes** tab.
3. You can **Select a Timeframe** from the drop-down menu.
4. The middle box, Lifesaving section, you can choose from the **drop-down menu**, the type of Lifesaving data you wish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



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 Data Alliance

Manage Users
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Shelter Pet Data Alliance

Service Request

Today's Date *

mm/dd/yyyy hh:mm pm

Your Name *

Organization Name *

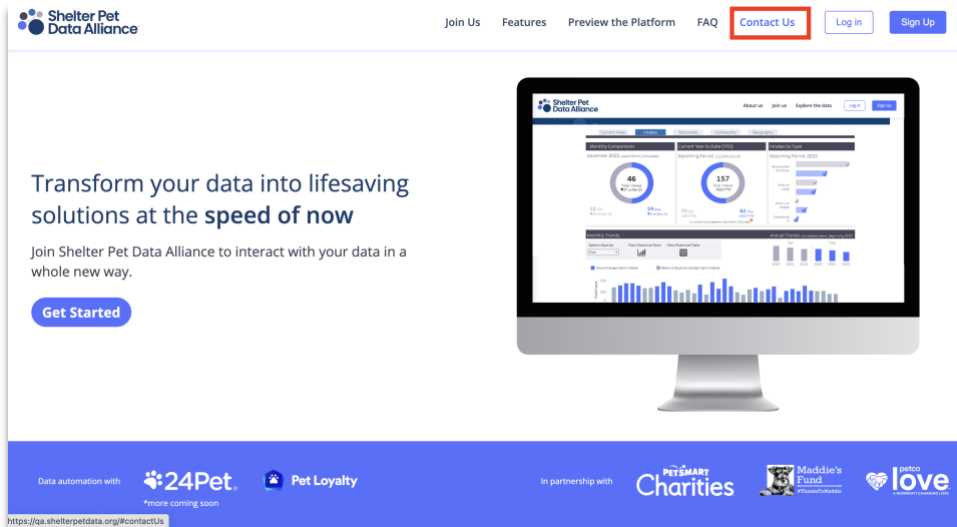
Please provide your full organization name. Using abbreviations or acronyms may cause service delays.

Preferred Method of Contact *

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**



Shelter Pet Data Alliance

Join Us Features Preview the Platform FAQ **Contact Us** Log In Sign Up

Transform your data into lifesaving solutions at the speed of now

Join Shelter Pet Data Alliance to interact with your data in a whole new way.

Get Started

Data automation with 24Pet *more coming soon

Pet Loyalty

In partnership with PETSMArt Charities

Maddie's Fund

petco love

<https://qa.shelterpetdata.org/#contactUs>