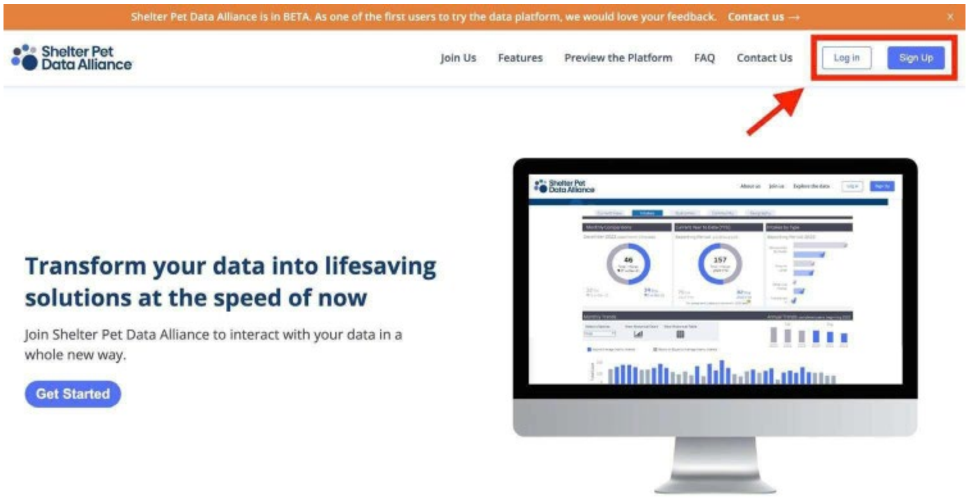
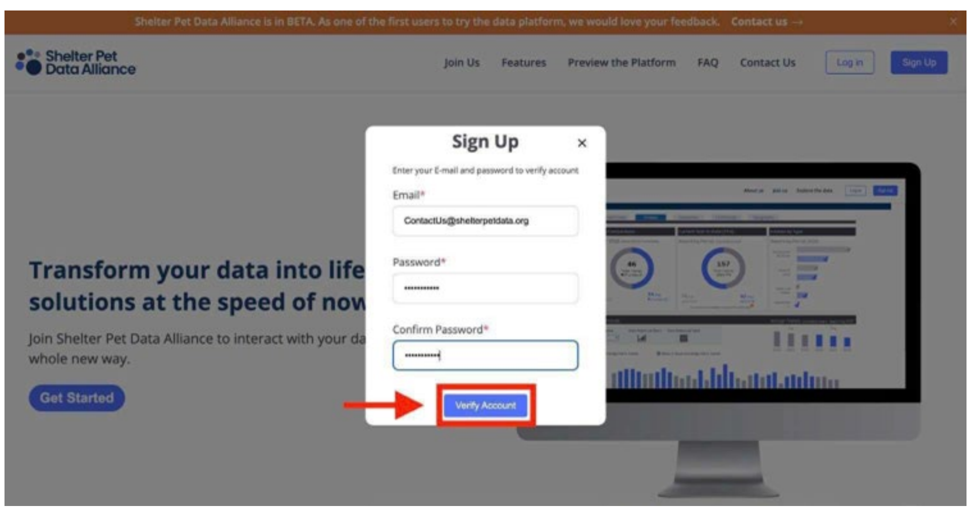
Table of Contents

Creating a user account and organization profile in Shelter Pet Data Alliance

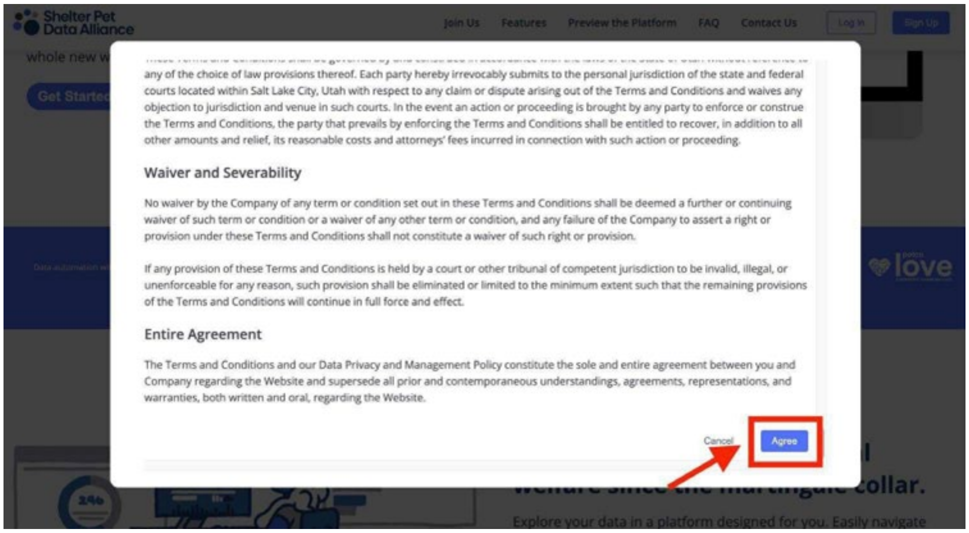
1. In your internet browser, type **shelterpetdata.org** in the address bar.
2. Click **Sign Up** on the upper right corner of the page.



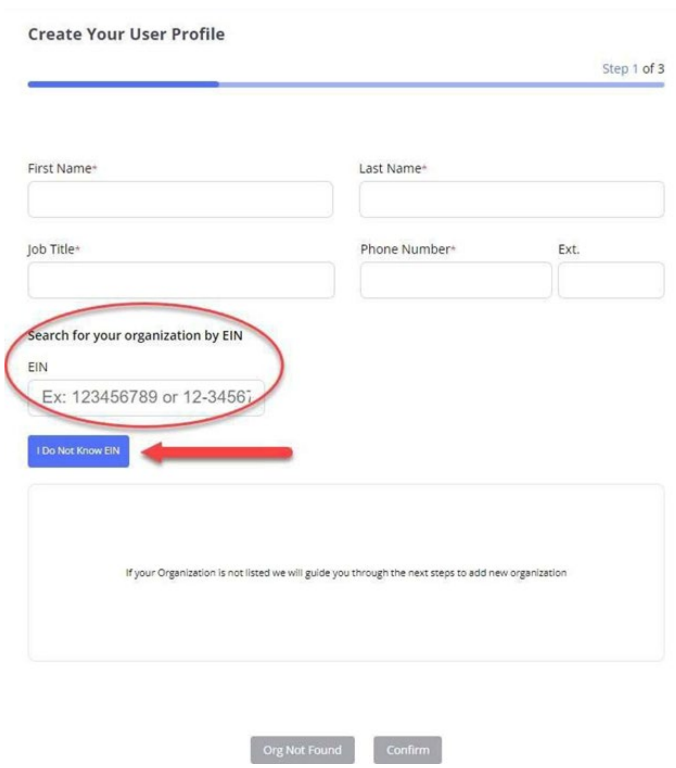
3. Enter your email address and create a password.
4. Click **Verify Account.**



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.

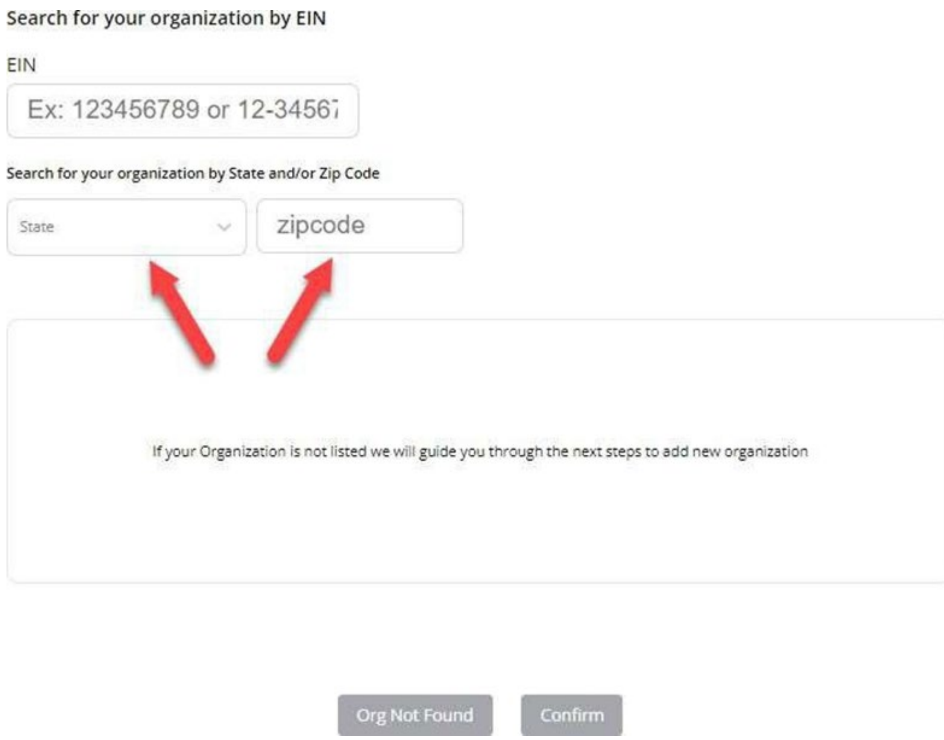


6. Check your email inbox for the verification email and click **Verify Email Address.**
7. You will be automatically directed back to the website. **DO NOT STOP HERE**
8. Click **Log In** and input your username (email address) and the password you created in step 3, then click **Log In**.
9. On the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



10. The "Search for your organization" section will be used to determine if your organization already has an account in Shelter Pet Data Alliance. The preferred way to search for your

organization is by using the EIN. If you don't know the EIN for your organization, click the "I Do Not Know EIN" button to search by state and/or zip code.



11. Find your organization in the list or complete the steps to create a new organization profile.
    a. Your organization may already be in our system and **<u>have</u>** a Shelter Pet Data Alliance account. If it is, it will appear in the search box. Click the circle to the left of the EIN to select it. Then click confirm to request access. An email will be sent to all current administrators of the account, and they will be able to accept or deny your request to join the organization's account.
    b. Your organization may already be in our system and **<u>not have</u>** a Shelter Pet Data Alliance account. If this is the case, it will appear in the search box. Click the circle to the left of the EIN to select it. Then click confirm and create your organization profile by filling in all required fields in Step 2. Click Next.
    c. Your organization may not be in our system. If you've conducted a thorough search for your organization and it does not appear in the list, you will have the option to add a new organization by clicking the Org Not Found button. Fill in all required fields in Step 2. Click Next.
    *Please note, if your organization is not in our system, and you register, the Shelter Pet Data Alliance support team will need to verify your EIN and organization information. Please allow up to 3 business days for the verification to be completed. In the meantime, you can enter data, but it won't process until you receive the notification that your organization has been verified.

12. For organizations creating a new Shelter Pet Data Alliance account, read and agree to the data privacy management policy and the authorization to act on behalf of an organization then click **Complete Registration**.

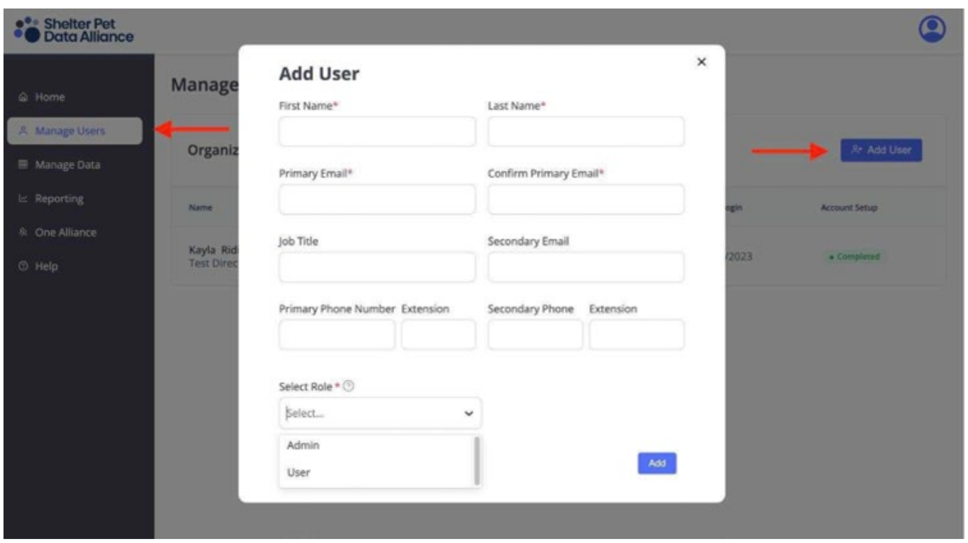
Accept/Deny New Users or Add Additional Admins and Users

If you have administrator level access, you'll be able to accept or deny requests for new users to join your organization's Shelter Pet Data Alliance account. You'll be notified of any new requests via email. When you receive a notification, please log in to your account, go to Manage Users, and accept or deny any users with the status of **Pending At Admin.**

The default role is user. If you would like to change any of these users to admins, please click on their name in the Manage Users list, select Edit at the bottom of the window, and choose Admin in the Select Role field. *Please note, both the user and admin roles have access to upload data, create new records, view Reporting, view One Alliance, and export data from Manage Data. Users do not have access to Manage Users.

Administrators can also 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.



4. In the Add User window, complete all required fields.
5. Select Role.

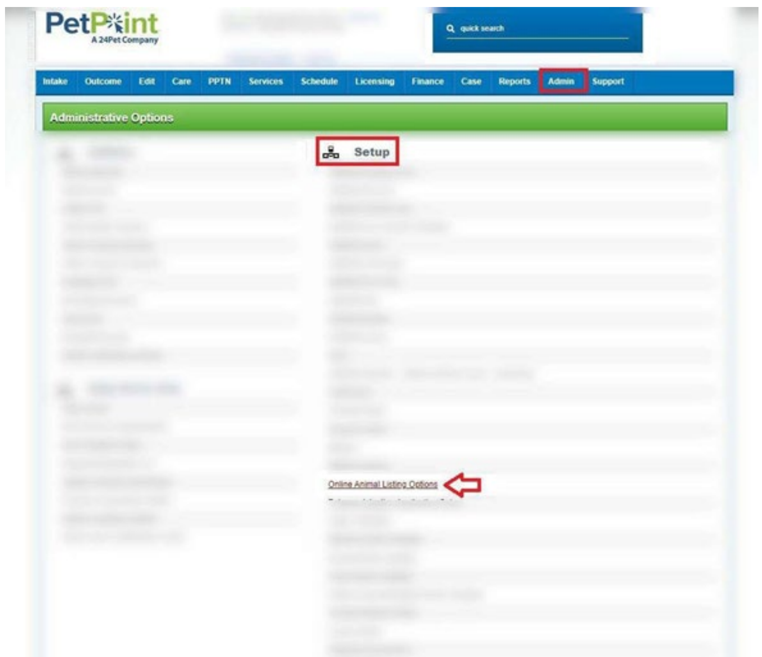
Opting In to Automatic Data Sharing

These instructions currently only apply to users of PetPoint & ShelterBuddy.

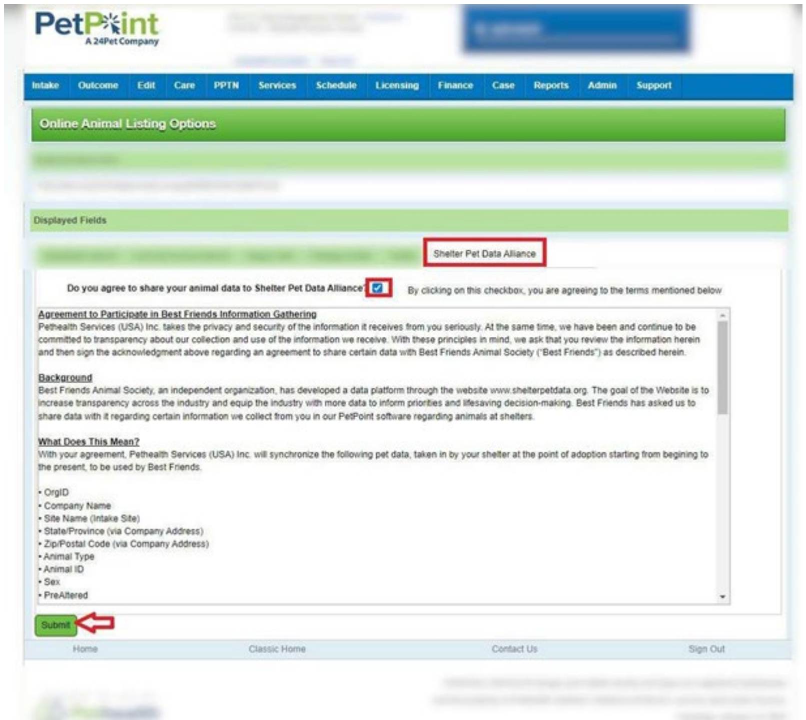
PetPoint Steps

Please complete the following steps **in PetPoint** to begin 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. Go to the **Admin** options in your PetPoint account.
2. In the Setup column, select **Online Animal Listing Options**.



3. Click on the Shelter Pet Data Alliance tab, agree to the terms by clicking on the checkbox, and the click submit to enable data sharing. **DO NOT STOP HERE**



4. **IMPORTANT STEP** – It is important to complete the mapping updates in your PetPoint account before entering your orgID in Shelter Pet Data Alliance. To update your mappings, you can view this **video** or follow the steps below:
   a. Navigate to Admin > Admin Options.
   b. Select Add/Edit Asilomar – Shelter Animals Count.
   c. Select the Shelter Animals Count tab.
   d. Within the 'Operation Type' dropdown, go through each value.
   e. For each operation type value, ensure that all subtypes your organization utilizes are properly added to each mapping value. Mapping outdated or deleted values has no negative effect and mapping those can reduce potential reporting discrepancies.

If automatic data sharing is already turned on in your Shelter Pet Data Alliance account and you've noticed discrepancies in your data, it's likely you need to update your mappings. If this is the case, please follow the steps above, then reach out to the SPDA team via https://shelterpetdata.org/help and let us know you've adjusted your mappings. Due to the complexity of work behind the scenes, we'll need to take some time to validate the changes and make sure your data is up-to-date and accurate. This process will take 2-3 days before the corrected data is in your account.

ShelterBuddy Steps

To enable the data feed from your ShelterBuddy database to the Shelter Pet Data Alliance (SPDA) database, you must first ensure the API is enabled on your ShelterBuddy account. If you are unsure whether the API is enabled, please email support@shelterbuddy.com, and their team will be happy to check for you.

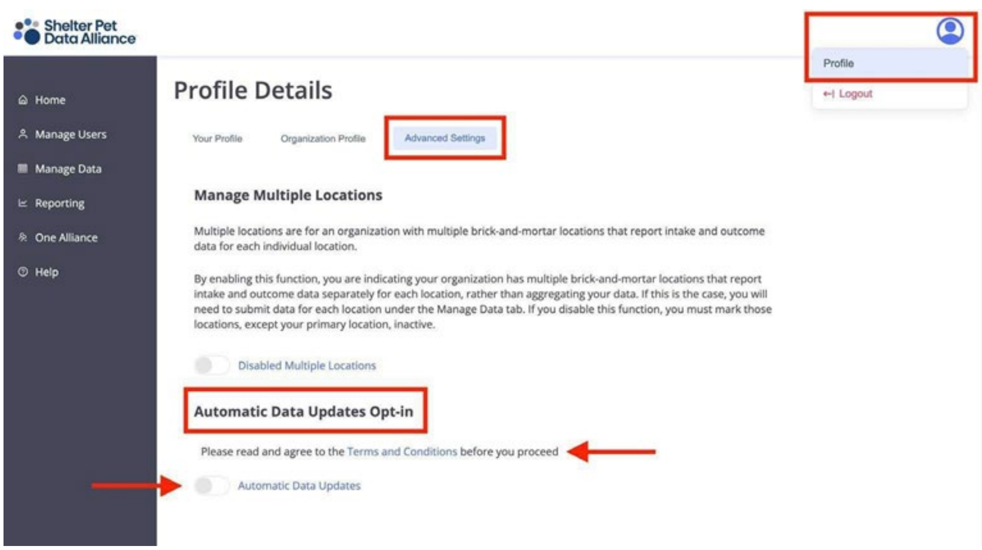
Once the API is enabled for your ShelterBuddy site, please follow these steps:

- Email support@shelterbuddy.com and request a new set of API credentials for the Best Friends SPDA feed. Be sure to include in your request that the credentials are for the "Best Friends SPDA feed".
- The ShelterBuddy team will send credentials back to you securely
- Complete the Shelter Pet Data Alliance steps below.

Shelter Pet Data Alliance Steps

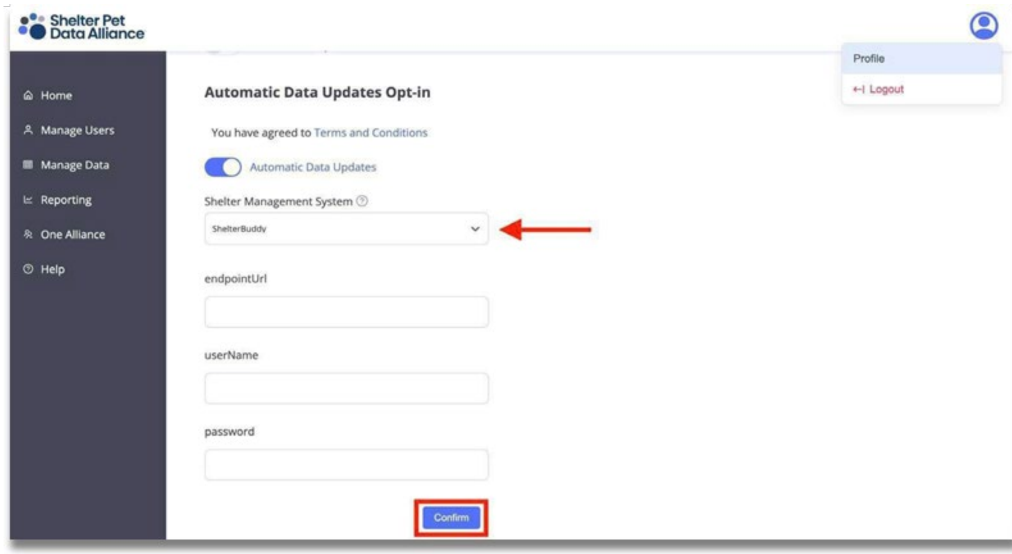
Please complete the following steps in **Shelter Pet Data Alliance** to finish setting up automatic data sharing.

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.



4. Next, choose your **Shelter Management System** from the dropdown menu.
5. Complete the required fields then click **Confirm**.
   *Note, if you do not know the values for the required fields, you will need to

contact your shelter management software company for support.

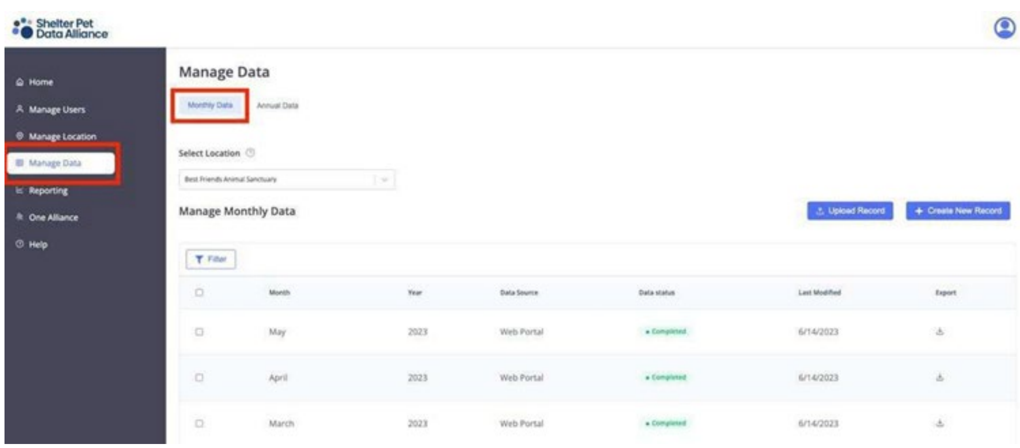


If your credentials are entered correctly, you will receive a success message from the system. If you receive an error message, verify the information you provided and click Confirm again.

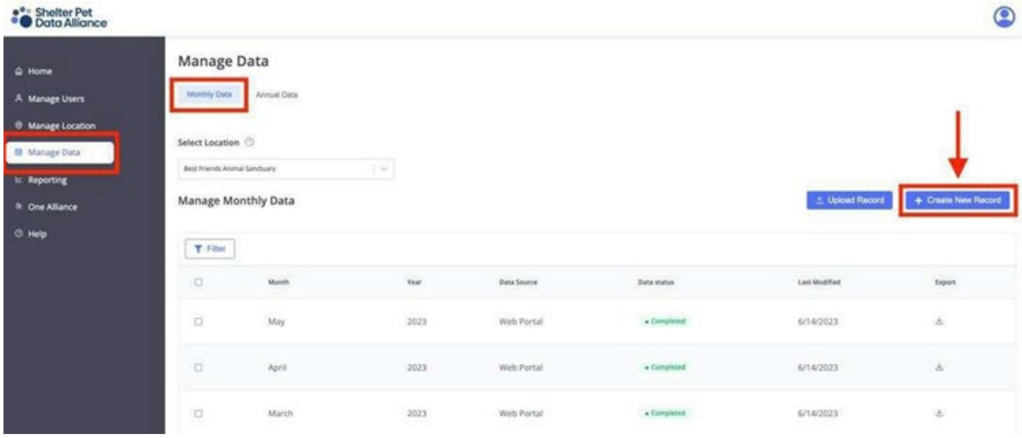
Creating New Records – Manual Reporting

Manually enter Monthly Data:

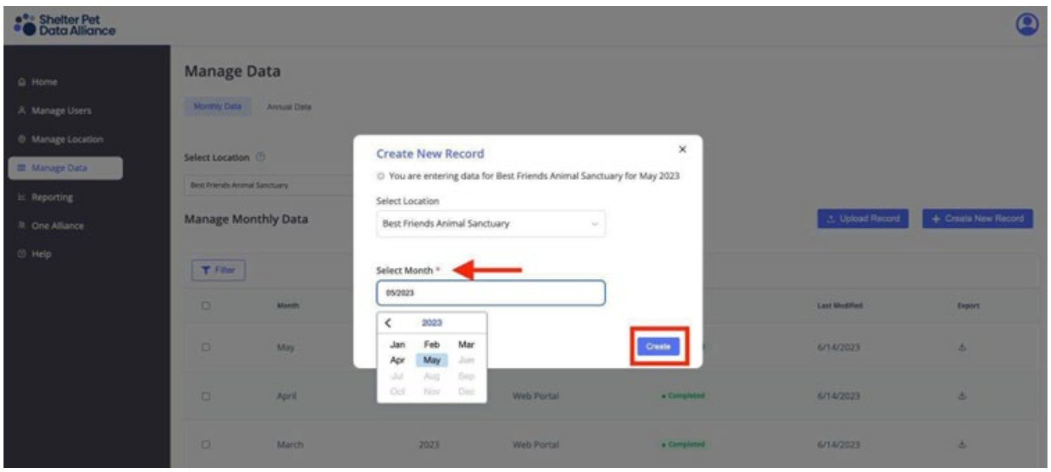
1. On the left side menu, click **Manage Data**.
2. Manage Data will open on the **Monthly Data** tab first.



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



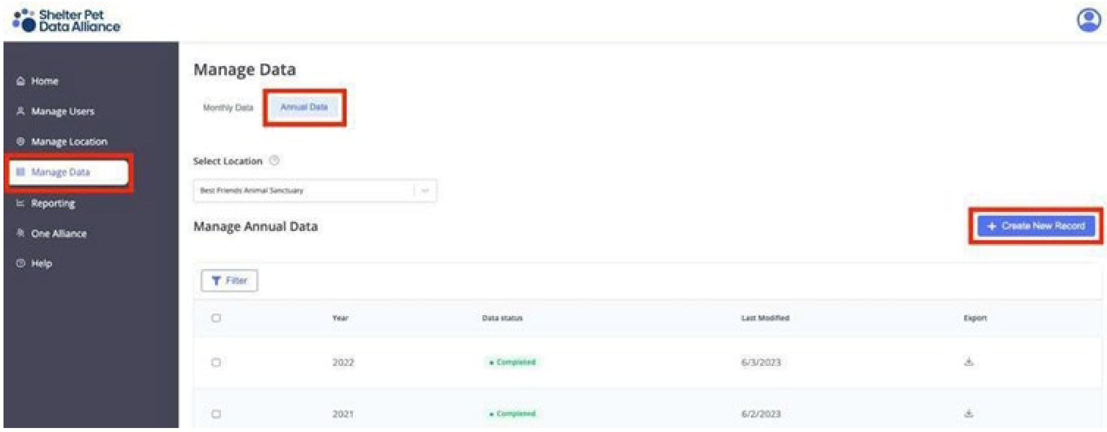
5. Click the **Submit Record** button at the bottom of the screen.

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



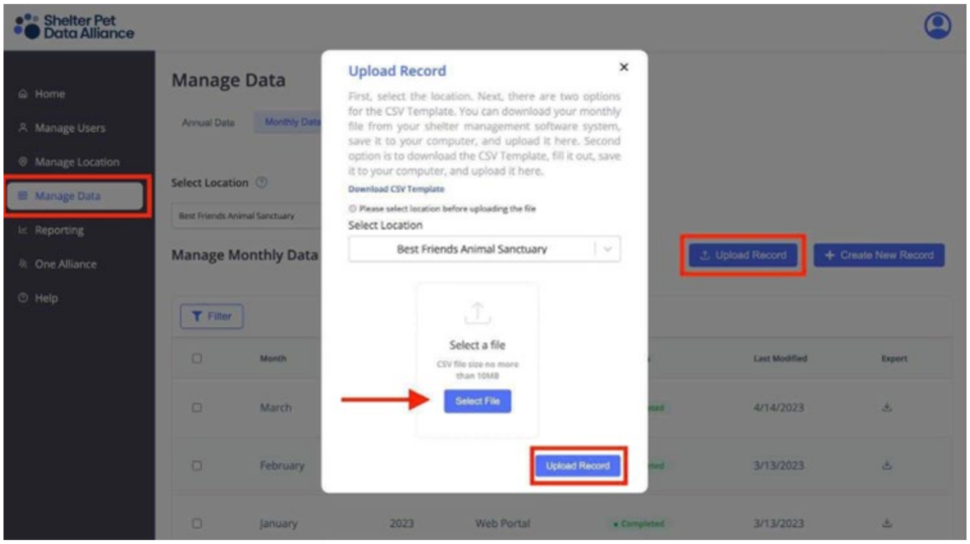
4. Populate all relevant fields with data for the **year** you selected.
5. Click the **Submit Record** button at the bottom of the screen.

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 (SAC) report, please follow these steps for uploading CSV files.

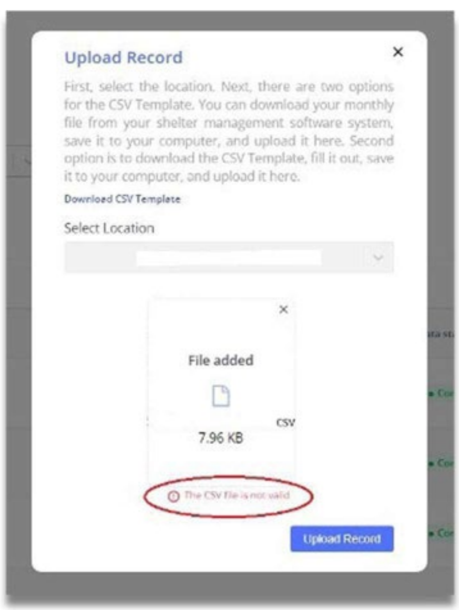
1. Using your SAC report, export monthly CSV files from your shelter management software.
2. On the left side menu in Shelter Pet Data Alliance, click **Manage Data**.
3. Select the **Monthly Data** tab.
4. Click the **Upload Record** button located on the right side of the screen.
5. In the Upload Record 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.

*Please note, if you upload or manually enter data for all 12 months in a calendar year, the system will automatically generate your annual file after the monthly records are in completed status.

Troubleshooting CSV Upload Error Message:



An error message will appear if you are using a report that aggregates annual data. In these cases, the month column of the CSV file shows 1,12. At this time, you can only upload CSV files when each row contains one month of data.

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:

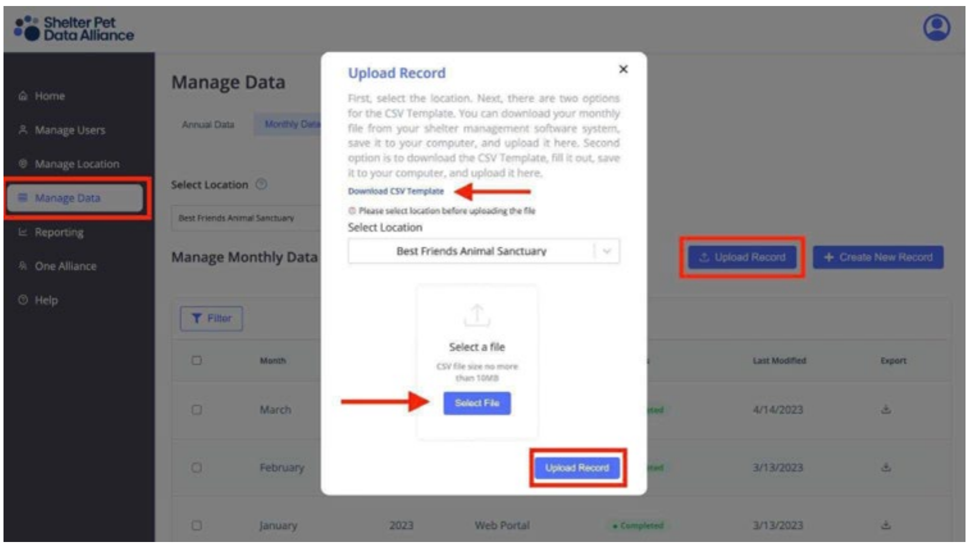
	A	B
1	Record Ye	Record Montl
2	2019	1 , 12
3	2019	1 , 12
4	2019	1 , 12
5	2019	1 , 12
6	2019	1 , 12
7	2019	1 , 12
8	2019	1 , 12

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 or return to the Manual Reporting section of this document for manual entry instructions.

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. Click **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 need to 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.

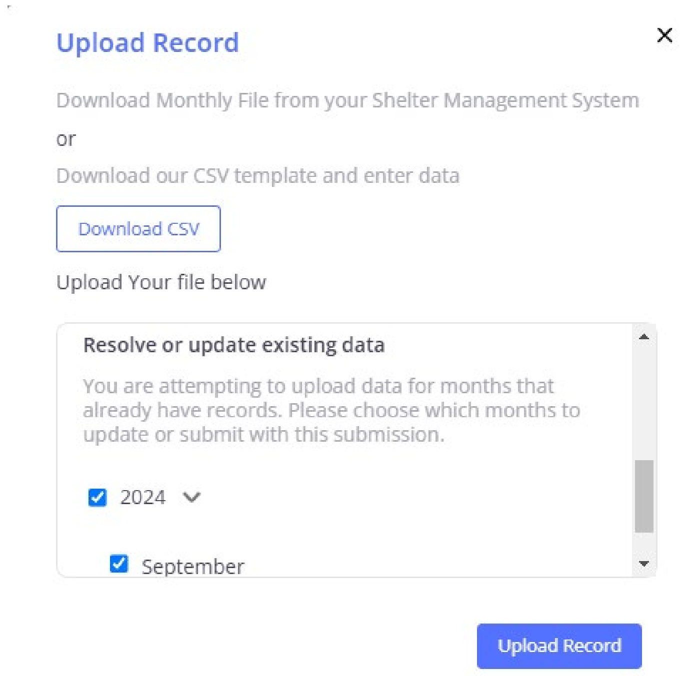
Updating Incorrect Records

These instructions will help you update 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.

You can either use a compatible CSV file or do a manual correction to update the incorrect month.

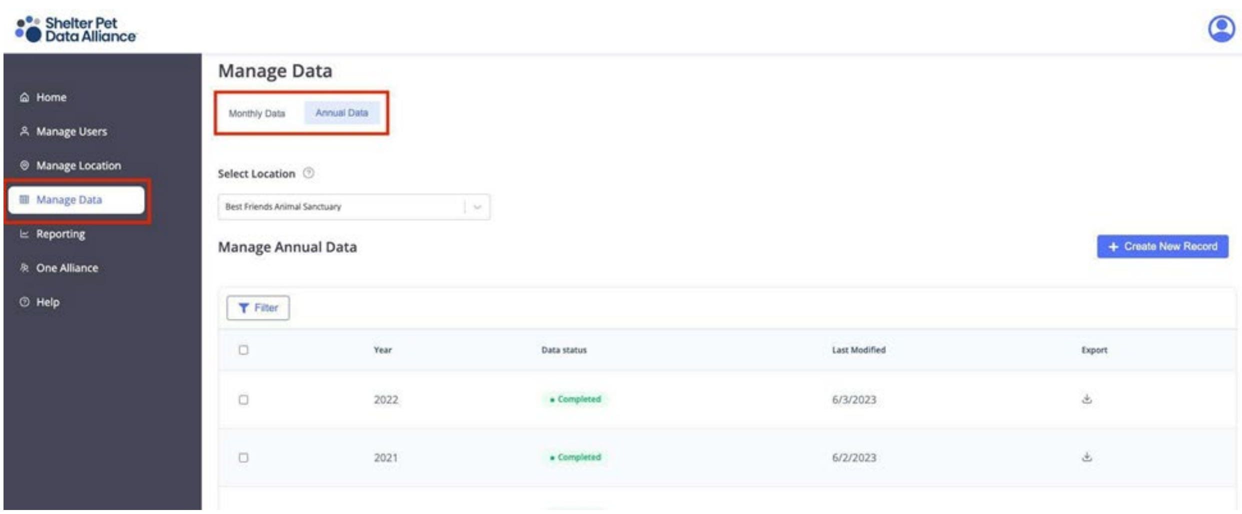
CSV Files:

Please follow the instructions under the Creating New Records – Uploading CSV Files section of this document. After you click Upload Record, the system will ask you if you want to update existing data. Check the box to the left of each month you'd like to update then click Upload Record.



Manually Update Incorrect Records:

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

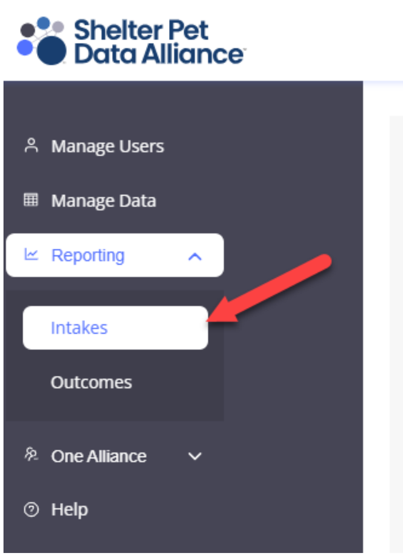
7. Make any necessary changes.
8. When finished with edits, click **Submit Record**.
9. To **EXIT** the screen without making changes, select the **Back** button in your browser or click **Manage Data** on the left side menu. A pop-up will appear stating “You will lose all unsaved work. Are you sure you want to leave this page?” Click **OK** to leave without saving 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

Intakes

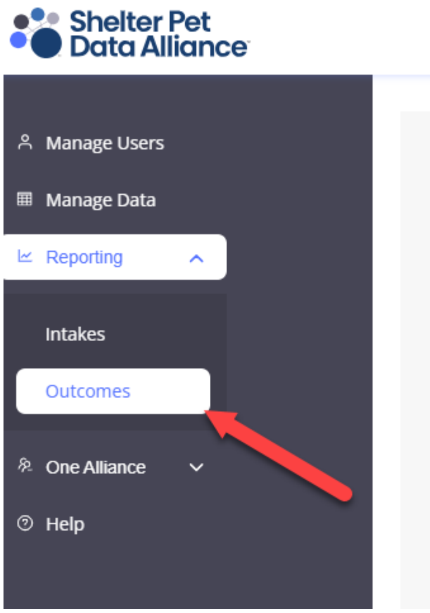
1. On the left side menu, click Reporting.
2. Click Intakes.



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. Click Outcomes.

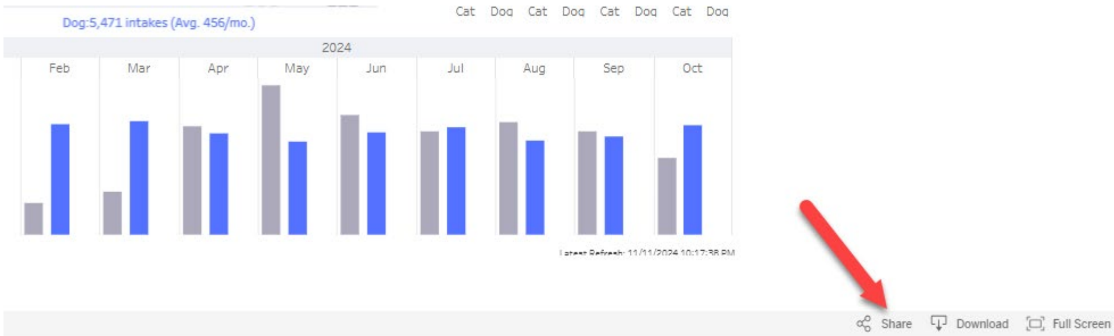


On this tab, you will be able to view Gross Outcomes, Lifesaving, Outcomes by Type, Monthly Trends, and Annual Trends.

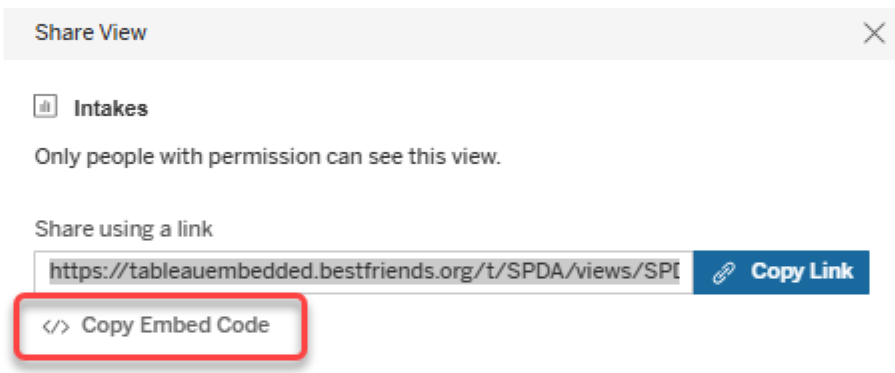
Embedding Visuals Into Your Organization's Website

To find the embed codes for the visuals:

1. Click **Reporting** on the left side menu.
2. Click **Intakes** or **Outcomes.**
3. Click **Share** on the menu at the bottom of the visual.



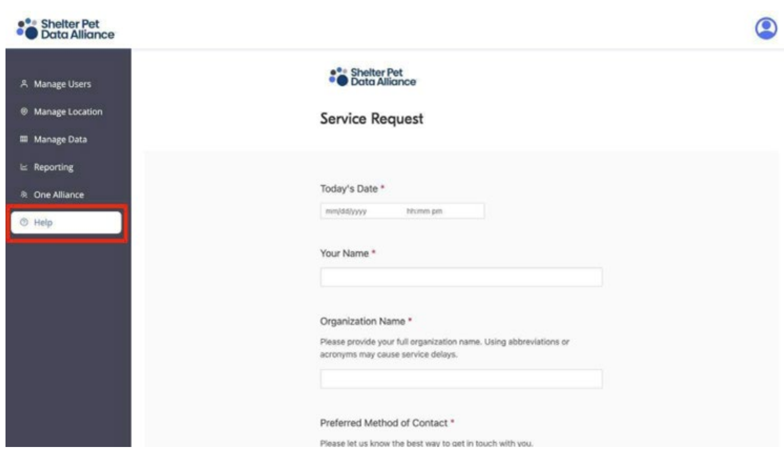
4. Click **Copy Embed Code.**



Submitting A Request For Help

If you are logged into your Shelter Pet Data Alliance account:

1. If you have further questions or need assistance, click **Help** on the left menu.
2. Populate all required fields.
3. Click **Submit**.



On the landing page, not logged in:

1. On the top right of the page, click **Contact Us**.
2. Populate all required fields.
3. Click **Submit**.