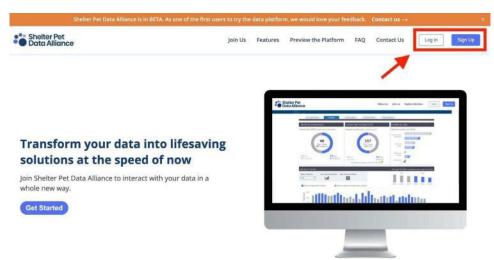


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Creating a user account and organization profile in Shelter Pet Data Alliance

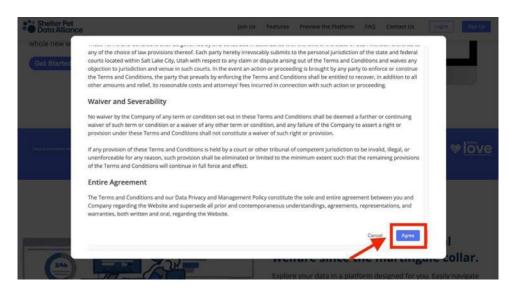
- 1. In your internet browser, type **shelterpetdata.org** in the address bar.
- 2. Click **Sign Up** on the upper right corner of the page.



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

Shelter Pet Data Alliance is in BETA. As one of th	e first users to try the data platfo	rm, we would love your feedb	ack. Contact us \rightarrow	×
Shelter Pet Data Alliance	Join Us Features	Preview the Platform	FAQ Contact Us	Log in Sign Up
Transform your data into life solutions at the speed of now Join Shelter Pet Data Alliance to interact with your da whole new way.	Sign Up Enter your E-mail and pressword to verify E-mail* ContactUs@shetterpeddats.org Password* Confirm Password* 			

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.

irst Name+	Läst Name+	
ob Title*	Phone Number*	Ext.
earch for your organization by EIN)	
Ex: 123456789 or 12-34567		
If your Organization is not listed v	ve will guide you through the next steps to add new	w organization

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.

Search for you	r organization	by EIN					
EIN							
Ex: 12345	56789 or 12	-34567					
Search for your org	anization by State	and/or Zip Code					
State	~][zipcode					
		1					
	lf your Organizat	ion is not listed we wi	il guide you thro	ough the next ste	ps to add new	organization	
		Org No	ot Found	Confirm			

- 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.

Shelter Pet Data Alliance	Manage	Add User				×	
lome	Manage	First Name*		Last Name*			
tanage Users	Organiz	Primary Email*		Confirm Primary Er	nail*	-	At Add User
porting	Name					egin	Account Setup
One Alliance	Kayla Rid Test Direc	Job Title		Secondary Email		/2023	* Completed
		Primary Phone Number Ext	ension	Secondary Phone	Extension		
		Select Role * 🕥					
		Şelect	~				
		Admin User			Add		

- 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 <u>contact PetPoint support</u> directly for assistance.

- 1. Go to the **Admin** options in your PetPoint account.
- 2. In the Setup column, select **Online Animal Listing Options**.

Outcome Edit Care PPT	N Services Schedule Licensing Finance Case Reports Admin Support	
ninistrative Options		
	<mark>a¥a</mark> Setup	
	Online Animal Listing Octions	
	The second states and a second second	

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**



- 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 <u>video</u> 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.

Shelter Pet Data Alliance		2
		Profile
ය Home	Profile Details	←l Logout
유 Manage Users	Your Profile Organization Profile Advanced Settings	
🔲 Manage Data		
⊯ Reporting	Manage Multiple Locations	
冬 One Alliance	Multiple locations are for an organization with multiple brick-and-mortar locations that report intake and outcome data for each individual location.	
© Help	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	

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

Shelter Pet Data Alliance		Profile
Home	Automatic Data Updates Opt-in	+I Logout
A Manage Users	You have agreed to Terms and Conditions	
II Manage Data	Automatic Data Updates	
Reporting	Shelter Management System 💿	
R One Alliance	ShelterBuddy V	
ð Help	endpointUrl	
	userName	
	password	

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.

Shelter Pet Data Alliance							(2)
≙ Home	Manage	Data					
A Manage Users	Monthly Data	Annual Data					
9 Manage Location							
B Manage Data	Select Locatio						
Reporting			19				
R One Alliance	Manage M	onthly Data				A Upload Record	+ Create New Record
© нер	T Faur						
	٥	Month	Year	Dala Source	Data status	Last Modified	Export
	0	Мау	2023	Web Portal	+ Complicted	6/14/2023	d.
	Q	April	2023	Web Portal	+ Completed	6/14/2023	۵
	0.	March	2023	Web Portal	. Completed	6/14/2023	۵.

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

Shelter Pet Data Alliance							٩
là Home	Manage	Data					
A Manage Users	Monthly Data	Annuel Data					
Manage Location Manage Data	Select Locatio	n ()					1
in Reporting	Best Priends Ani	nal Sanchuary	194				
R One Alliance	Manage M	onthly Data				1 Upload Record	+ Create New Record
© нер	T Film						
	0	Month	Yaur	Data Source	Deta status	Last Modified	Export
	a.	May	2023	Web Portal	+ Completion	6/14/2023	ð.
	0	April	2023	Web Portal	+ Completed	6/14/2023	4
	0	March	2023	Web Portal	. Completion	6/14/2023	٤

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

••• Shelter Pet •• Data Alliance								٢
요 Home 과 Manage Users	Manage	Data Avvuar Date						
Manage Location Manage Data Manage Data	Select Locatio Best Preside Are Manage M		O You a Select Lo	ication lends Animal Sa	for Best Friends Animal Sanct	x uary for May 2023	▲ Uplead Record	+ Create New Record
	D	j Murdh	05202				Last Modified	Export
	, D	May	K Jan Apr	Feb Mar May Jun		Create	6/1.4/2023	5
	0	April	94 0d	Aug Sep Nov Dec	Web Portal	• Completed	6/14/2023	*
	0	March		2023	Web Portal	a Completed	6/14/2023	4

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.

Shelter Pet Data Alliance					9
© Home A Manage Users © Manage Location	Manage Da Monthly Data	Annual Data			
Manage Data Reporting R One Alliance O Help	Best Friends Animal Sa Manage Annu		*		+ Create New Record
	T Filter	Year	Data status	Last Modified	Export
	0	2022	* Completed	6/3/2023	خ
	0	2021	Completing	6/2/2023	۵

- 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.

<u>Creating New Records – Uploading CSV Files</u>

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.

						×
	Manag	e Data	Upload Record	×		
			First, select the location. Next, there a for the CSV Template. You can downloa			
	Annual Dat	ta Monthly Data	file from your shelter management s save it to your computer, and upload			
			option is to download the CSV Templat it to your computer, and upload it here	e, fill it out, save		
Aanage Data	Select Locat	tion 💿	Download CSV Template			
Reporting	Best Friends A	Animal Sanctuary	 Please select location before uploading the file Select Location 			
	Manage	Monthly Data	Best Friends Animal Sanctuar	Ý 1~	1 Upload Record +	Create New Recor
				and the second se		
	T Filter	e				
			Select a file			
	T Filter	r Month			Last Modified	Export
			Select a file CSV file size no more		Last Modified 4/14/2023	kaport A.
	0	Month	Select a file CSV file size no more than 10MB			
	0	Month	Select a file CSV file size no more than 10MB	ras Upload Record		
	0	Month	Select a file CSV file size no more than 10MB		4/14/2023	÷

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.

Upload Rec			
First, select the for the CSV Ten file from your save it to your option is to dow it to your comp	nplate. You can shelter manage computer, and vnload the CSV	download you ament softwar upload it her Template, fill i	ar monthly re system, re. Second
Download CSV Tem	plete		
Select Location			
			*
		×	
	File adde		
	File adde	3	
	7.96 KB	CSV	
	1000000		
0	The CSV file is	blauton	
-		-	
		Uploa	d Record

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:

1	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:

1	А	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
-		

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.

Shelter Pet Data Alliance						9
© Home A Manage Users Ø Manage Location ■ Manage Data L: Reporting Ø One Alliance Ø Help	Monthly Data	for the CSV Templ file from your she save it to your co- option is to down it to your compute Download CSV Templat © Please select location Select Location	cation. Next, there are tw ste. You can download you fter management softwar mputer, and upload it her oad the CSV Template, fill i r, and upload it here.	r monthly is system, e. Second cout, save	: Upload Record +	Create New Record
	Month		Select a file SV file size no more than 10/08 Solid: File		Last Modified	Export
	February		Uplos	d Record	3/13/2023	đ
	January	2023	Web Portal	• Completed	3/13/2023	ىك

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.

Jpload Record	×
ownload Monthly File from your Shelter Management S	ystem
pr	
ownload our CSV template and enter data	
Download CSV	
Jpload Your file below	
Resolve or update existing data	•
You are attempting to upload data for months that already have records. Please choose which months to	
update or submit with this submission.	
	1

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.

Shelter Pet Data Alliance	Manage Da	-+			C
ක Home ዳ Manage Users	Monthly Data	Annual Data			
Manage Location	Select Location	Ð			
Manage Data Reporting	Best Friends Animal S		×		_
R One Alliance	Manage Annu	ial Data			+ Create New Record
D Help	T Filter				
	o	Year	Data status	Last Modified	Export
	o	2022	* Completed	6/3/2023	ځ
	0	2021	· Completed	6/2/2023	ځ

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

					2
Annual Shelter Data Hover over each [©] for definition Details					
Best Friends Animal Society © Best Friends Animal Sanctuary 2022				Data Status: • complete	
Edit					
Live Intake	Dog	Cat	Undesignated 💿	Total	
	Nover over each ⁽¹⁾ for definition Details Best Friends Animal Society Best Friends Animal Sanctuary 2022 Econ	Hover over each [©] for definition Details Best Friends Animal Society [©] Best Friends Animal Sanctuary [©] 2022 Live Intake	Rover over each [®] for definition Details Best Friends Animal Society @ Best Friends Animal Sanctuary @ 2022 Live Intake	Hover over each ⁽¹⁾ for definition Details Best Friends Animal Society Best Friends Animal Sanctuary Comparison Compa	Rover over each [©] for definition Details Best Friends Animal Society [©] Dest Friends Animal Sanctuary [©] 2022 Data Status: • complete Data Status: • complete with the Intake

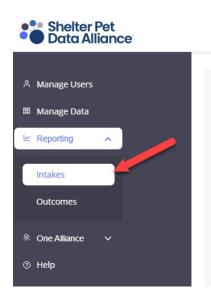
- 7. Make any necessary changes.
- 8. When finished with edits, click **Submit Record**.
- 9. To **EXIT** the screen without making changes, select the **Back** button in your browser or click **Manage Data** on the left side menu. A pop-up will appear stating "You will lose all unsaved work. Are you 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

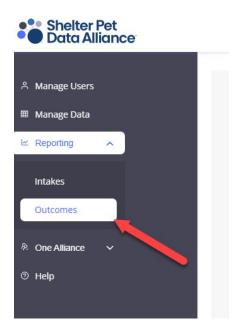
- 1. On the left side menu, click Reporting.
- 2. Click Intakes.



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.

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.

Shelter Pet Data Alliance		٢
名 Manage Users	● Shelter Pet ■ Data Alliance	
Manage Location Manage Data	Service Request	
l≃ Reporting	Today's Date * mmittigyyy Norms per	
	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 leach with you.	

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.

