



Shelterly Quick Reference Orientation

Summary

Key points for any Shelterly user.

Startup

Use the Chrome browser to log in at <https://app.shelterly.org>.

- Select the organization: if working with multiple groups, select the one managing the incident.
- Select the incident.
- Always confirm you're in the correct incident.
- Make sure you are in a Training incident if you are entering practice (fake) data.
- Never use bookmarks within Shelterly.
- If Shelterly has been open and idle, refresh the page to verify you're still signed in.
- Shelterly assigns identifying numbers to each Service Request (SR), each Dispatch Assignment (DA), each owner, and each animal (or animal group).
 - Those identifying numbers appear in the URL of the relevant pages.
 - Number 23 could refer to owner 23, SR 23, DA 23, or animal 23. Specify which.
- Exercise caution and don't act outside your role: don't cancel animals or otherwise change animal statuses unless authorized and don't give the public information unless authorized/confirmed.

Incidents

Shelterly uses two types of incidents, Training and Real.

- Training incidents can be recognized by the ⓘ symbol next to the incident name.
- All Training incidents share some information, and all Real incidents share some information, but there is no sharing of information between training and real incidents.
 - Shelters (including shelter buildings and rooms) created in any Training incident are present in all training incidents, while shelters created in any Real incident are present in all Real incidents.
 - Owners created in any Training incident become part of the "existing owner" list for all Training incidents, while owners created in any Real incident become part of the "existing owner" list for all Real incidents.
 - Team Members (Dispatch Module) created in any Training incident are present in all Training incidents, while team members created in any Real incident are present in all Real incidents.
- It is recommended to use the word "Training" as part of all incident and shelter names in Training incidents to further reduce the risk of confusion between real and training incidents.
- Aside from the naming convention, it is recommended to set up shelters and **DISPATCH** module team members to closely resemble Real incidents.
- Users can practice freely in Training incidents without risk of contaminating or endangering the Real incident environment.

Modules

Navigate Shelterly by selecting the appropriate module on the left hand menu.

- All users can access the **HOTLINE, DISPATCH, SHELTER, SEARCH, and REPORTS** modules.

- All users can view the **VETMED** module, but some functions within the module are only available for authorized users, usually veterinarians.

Addresses on Shelterly

When entering an address, such as for Contact, Service Request, and Shelter, the form requires using the **Search for XXXX Address** field first, then selecting the verified address from the pull-down menu.

- Shelterly only accepts verified addresses - you can't type directly into the greyed-out address fields below and you can't enter an address it doesn't recognize.
- If a street address isn't available, enter just a street name such as "First Street" or an intersection such as "Pine Lane & Main Street".
- Click and drag the pin on the map to fine-tune location if appropriate.
- If an out-of-area address is selected, the maps will reorient to include it, making the maps larger and less effective for the local purpose.

Shelterly differentiates between owner address and service request address, as these will often but not always be the same.

Navigation

- Use the back arrow next to the page name (i.e. **Owner Information, Animal Information, Service Request Information**) to navigate between pages if needed. Information will be saved unless Shelterly warns otherwise.
- Leaving a module without saving risks losing any entered information.
- Shelterly can be used in multiple tabs, so one can be used to double-check information in other modules while one is used to enter new information. Approach with caution.

Notes

- In many cases hovering over an icon will tell you what it is.
- The incident description on the home page can include helpful information.
 - Ex: Training Incident A may have a description: This incident is available for independent volunteer practice.
- If using Shelterly on a shared computer, sign out when going off shift.
- Each organization will establish procedures for how to use Shelterly within their context and needs.