So far in our sessions we looked at your goals and mission-identifying what you want to see/report on in the future to shape our setup.
Next we evaluated your set up and pinpointed set up items that may need adjustments and ways to improve your data entry so you can get the results you want--you want the data in there, and you want it in the right place, too, right.
We have looked at reports to help keep your data “clean” so that when we run reports to give projections or summarize our efforts for the year, we know that the data is accurate.
Real information is readily available to us now in a way that is really transforming how shelters operate. We have gotten all that data in the database and now we will look at reports to keep your process in motion.

Breaking the Bottlenecks—Using PetPoint to identify organizational bottle necks. Bottlenecks are impediments to reaching our goals. We will focus mostly on our animal flow, because that is the key.

Based on the concepts and goals you identified in our earlier sessions we are now going to use some standard reports to identify blocks and evaluate the “health” of our operational process.

Where do you think things get bogged down or clogged in your organization? Is your answer based on Data, or observation...these are your bottlenecks. We need to be able to spot this so we can keep the animals moving.
We want to keep our adoption area (our whole shelter, actually) at an optimum, capacity. What happens when your adoption area is over crowded? What kind of operational impact do you see? Are you successful in your placements? Is your staff stressed out to provide good customer service? Have you noticed what happens to your adoption numbers when your animal inventory is low, or low in puppies or kittens? Do you experience any difference in your outcomes?

We of course want to increase adoptions, because that makes room for more animals to move through your facility. It is all about the FLOW. If any of these pieces break or begin to slow down, the whole system is affected.

In Numbers Nanny, we looked at location view and other reports to find data that may need clean up. Now, when we look at them we will be looking for different things. For this session, you need user access of Power User and above and reports website access.
Take a look at what is happening in your shelter right now.

You take a call from one of your transfer partners that wants to know if you have space to take a transfer (maybe even an emergency transfer). How many empty kennels are there in your shelter right now? How many animals could you take in? Are any of your unoccupied kennels out of service or broken? Reserved?

Even though, you would still like to (or need to) confer with someone “on the ground” in the kennel area, why do you think it might be helpful for you to be able to access this information any time you might want it?

How do we find this information? Start with Location View and Location Manager …Login and open Location View — in Numbers Nanny, we used this for a quick snapshot of our animals. We can start there to see our under capacity kennels. When we look at Location manager...We can see a little more info about each of our sub locations. In Numbers NAnny, we looked at the animals— in this session, we are looking at the kennels. We can start with “all occupied” to see who is in our shelter, then we can look at unoccupied to see what kennels are open/or empty. Under capacity show us both empty and under capacity.

Location MANAGER, you see what is happening with those kennels! Power Users and up
can update information on the Location Manager. The amount of information we can get here depends on your set up and real time data entry!! If we are set up properly, we can see how many kennels or sublocations are under capacity or unoccupied. We can also see if the sublocations are unusable and why. If you need to re-sort this remember you can click the blue headers. Notice there are not animal filters, we do not see animals on this screen. That is why we might need to use the two together. They can give you an idea of a kennel snapshot.

How many animals are in your shelter right now? Is your adoption room at your optimum level? If there aren’t animals in your adoption area, where are they? Was your adoption area full last week? To find these answers look to the inventory reports. There are several different inventory reports? How are they different?

Take a look at Animal Inventory, Animal Inventory History and Animal Inventory History Extended-run these reports to see how they are different. Be sure to examine the details available on a report--that can help offer insight into why animals are stuck in one stage or location. Start with Animal Inventory: search by a particular stage, try additional combinations of filters based on what you learn. Looking at this output, you can see your average length of stay--this is not the average length of stay for the stage but from the time the animal intake was completed. What FLAGS do you see in your data? Try grouping all animals by location and then try by stage. You can also filter by breed to evaluate the Length of Stay. You can elect to include intake, emancipation or review dates also.
There are some other reports specifically designed to help us with length of stay and other information useful for helping us keep animals moving.

We have the –Animal Length of Stay report: This report provide specific animals’ length of stay information along with group totals and averages based on breed, color, or how they came in or how they left. This report would be useful to see how long animals stay based on those various pieces of information. This report includes active and released animals, and doesn’t allow you to limit to only active animals. It does require an intake or outcome date which is dependent on your “based on” choice. If you leave intake type set to all, base on intake type, set your date and then group by intake type. Find the intake type with the highest average LOS and we will take that back to the report parameters. Now set that intake type as your intake parameter and change your grouping to Outcome type. What do you learn? Group it by Breed, too. Any surprises? This gives you additional information about your Length of Stay.

Now open Stage Days—this report will allow us to look at our process in several ways. Choose a particular intake type that may be trouble (like the one from the example above). Here you can see how those animals have moved (or not moved) through our process. This output will include released animals, too. The dates you are entering here are stage dates, not intake or outcome, and you are looking for animals that were moved into or out of a
stage during the time frame indicated here.

We can look at our **Stage Length of Stay** in conjunction with our Animal inventory report to help us have a clearer picture of how long animals have been in a particular stage. From your animal inventory review or your stage days review what was a stage with high length of stay—to run this report you must choose a particular stage. This means you can look at the individual stages to see information about details like breed and color. There is an option to select the checkbox to show location changes per stage as well. Try this and notice that this selection will cause me animals appear more that once in your output, if they were assigned a different location during this stage.

Finally look at Stage Review report. This will help you see active animals that are in need of a stage change based on your policy (but only if you are entering our data in real time and if we are using review dates). This is an integral part of being able to use your data in this way. Options in this report—If you want to look a one stage, choose that stage or you can leave it set to all. Then choose “with that stage”, set your dates, for instance if you want to see all animals who has a review date coming up this week, or in the past. Don’t forget you can click to sort by any of these headings with arrows.
What medical procedures are due today? Are animals not moving forward because their procedures are not being completed in a timely manner? What is my fastest way to see ALL of the medical procedures that are due today (or past due)? A quick check—Using the Action Center to monitor past due items is the fastest way, then ask why aren’t they being completed.

So how many unaltered animals are waiting on surgery? How would you answer that question? Do I want to see a particular stage? Do your animals get assigned a particular stage while awaiting surgery? How long have they been waiting? The ideal way to monitor this is to schedule your surgeries in the medical module. This gives you the best access to reporting. But the real answer depends on your data set up and entry.

Our first medical report today is Animal Inventory Medical—This report will allow us to pull information by unaltered status, and summary and we can find our unaltered animals and expand to see any medical history they may have. This is a great report to use for medical treatment rounds. Run this based on STAGE=MEDICAL TREATMENT, SHOW MEDICAL, GROUP BY LOCATION and DETAIL. Does this output look like it would be helpful?

There is a wealth of medical reports that can help you dig deeper into pending and scheduled items, and even missing items. These items can all be filtered by their status (like
scheduled or pending) or by their review date. You have similar reports for behavior test. If it is required that all animals have a particular behavior test before they can move toward adoption, use the **Behavior Missing Test** to find out how many still need the test.

To evaluate Quarantine, you also need to identify IF and HOW you tell PetPoint the animals are in quarantine. Is it a stage? A location? A Memo? Did you know that you can look up Animal Memo review dates, too? To find active animals in your database WITH a particular memo that indicates something in your process AND you want to see the ones with review dates for this month use **Animal Inventory Memo**. Run this report to check your data.

If you used a HOLD to identify important parts of your process, failing to evaluate and remove them could clog up the process. (Like treatment, outcome, stray, or even adoption pending). Look now at **Holding Current**. You can leave the hold reason blank or choose the particular hold you want to investigate—even add a filter for memos AND include them. You even have the option to use review date or emancipation date here to help identify (depending on the circumstances) whether or not the holds should be lifted. You can also see HOLD review information on your **Location View Report**! (back on the Location View, choose all occupied, and click the blue Hold header to sort the hold column.
Using the Schedule module can help you keep things flowing throughout the organization. A way to keep everyone up to date with that is going on! Do you need more staff or volunteers to handle the schedule items on particular days—approving vacation or calling in extra staff. Transfer planning.

Another area where things can get bogged down is Foster Care. How long have your animals been in foster? How many foster homes are open? This information can influence whether or not you can take a transfer or help in a field rescue. A very quick way to see all of your current foster animals is to view the **FOSTER CURRENT** report. You can select a foster start reason, but you don’t have to. Most often this is grouped by foster parent, but to help identify bottlenecks, you can group the output by **Length in Foster**. Make a note here to go back and investigate the other Foster reports. When you have time.

Have you ever looked at the “daily reports” your Daily count, Daily management report? Or Daily intake or Outcome Crosstabs. And Did you know that you can look at your Operations by hour in your Animal Operations Hourly Crosstab?

What if you notice in your monthly review, that your stats are really low (or zero) for a particular day—now, on a monthly basis, you may be able to remember why but will you remember why next month, quarter or year? How nice would it be to be able to see a
summary of your vacation/training/closures because you have been entering that information into the schedule module? *(let me show you what that might look like: take a look at the schedule crosstab and the schedule express.)*
What if you notice in your monthly review, that your stats are really low (or zero) for a particular day—now, on a monthly basis, you may be able to remember why but will you remember why next month, quarter or year? How nice would it be to be able to see a summary of your vacation/training/closures because you have been entering that information into the schedule module? It is possible to create schedule items and track staffing impact, shelter closures, customer traffic and other items that would help you make sense of your data.

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Reviewing your LOS as part of daily/weekly review check to see how long an animal has been there (Take action or have the staff take action to schedule the animals for what is next in your process)

If you have wondered if animals from a particular source or intake type contribute to your high length of stay-- Now you know where to start your investigation
Stay on top of your LOS management and maintain CLEAN, REAL TIME, DATA ENTRY by completing a Stage/Location physical review as part of daily walkthrough as you review each animal--is it in the correct stage?
If you have discovered that your animals are consistently exceeding their expected review date in a particular stage, it may be time for a process evaluation.
Why aren’t you meeting the expectation? Should the process be different? Do Animals need more time in that stage? Does the process or the expectation need to be updated?

Depending on your set up, you are watching memo reviews for things like (Foster reviews, post adoption follow up-special circumstances) And you can further investigate a particular animals journey using their animal view report or your animal inventory management report.

We focused finding issues in this class, but use your data to be proactive- and anticipate
your needs regarding staffing, resource allocation, volunteer recruiting, ordering supplies.)
This is also the way to find what IS working in your organization, too. And finally, what is the
MOST important thing to remember about all of this?
MOST IMPORTANT NOTE:

If it isn’t IN the database, you can’t review it or report on it!