

Reports in ShelterPact

Detailed instructions with real ShelterPact screenshots

Interface reviewed October 12, 2026. Screenshots show fictional demo records. Available features and actions depend on organization modules, permissions, and record state.

Run managed reports, export results, and build a reusable custom report with verified filters and summaries.

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Find, Run, and Export a Report

Report Center combines managed, standard operational, and custom reports. Read the report's scope before comparing its totals to another workspace.

Before you begin: Open Administration / Reports. Confirm your role can access the required data and export functions.

Step-by-step instructions

1. Search by report name, category, or creator, or select a category. Review Managed Reports, Standard Operational Reports, and Custom Reports.
2. Read the report title and description. Distinguish current population from admission history, outcomes from animal identities, and charges from actual payments.
3. Select Run Report on the intended card. Review matching rows, record count, summaries, groups, and detail columns.
4. Check the report's defined date or status scope. Do not assume a managed report asks for a date range if its definition already specifies today, month, or year-to-date.
5. Review representative rows against known source records before using the result for a decision or official submission.
6. Use CSV, Excel, or Print / PDF on Report Results to produce the needed format. Check the exported scope and column meanings.
7. Close the result when finished. Use favorites and recently run information for repeat work, but still review scope each time.

Screenshots

Figure 1. Report Center organizes managed, standard, and organization custom reports.

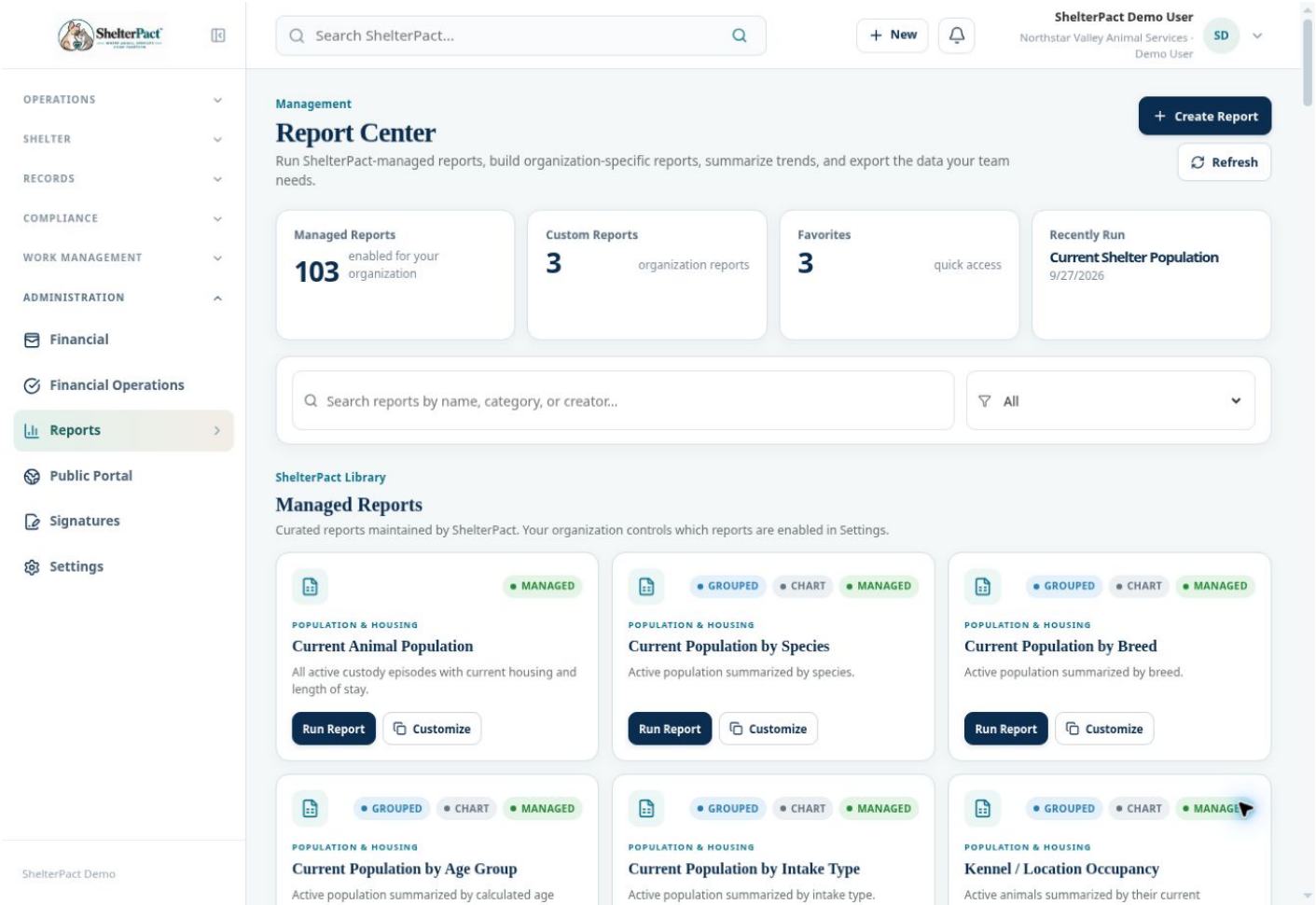
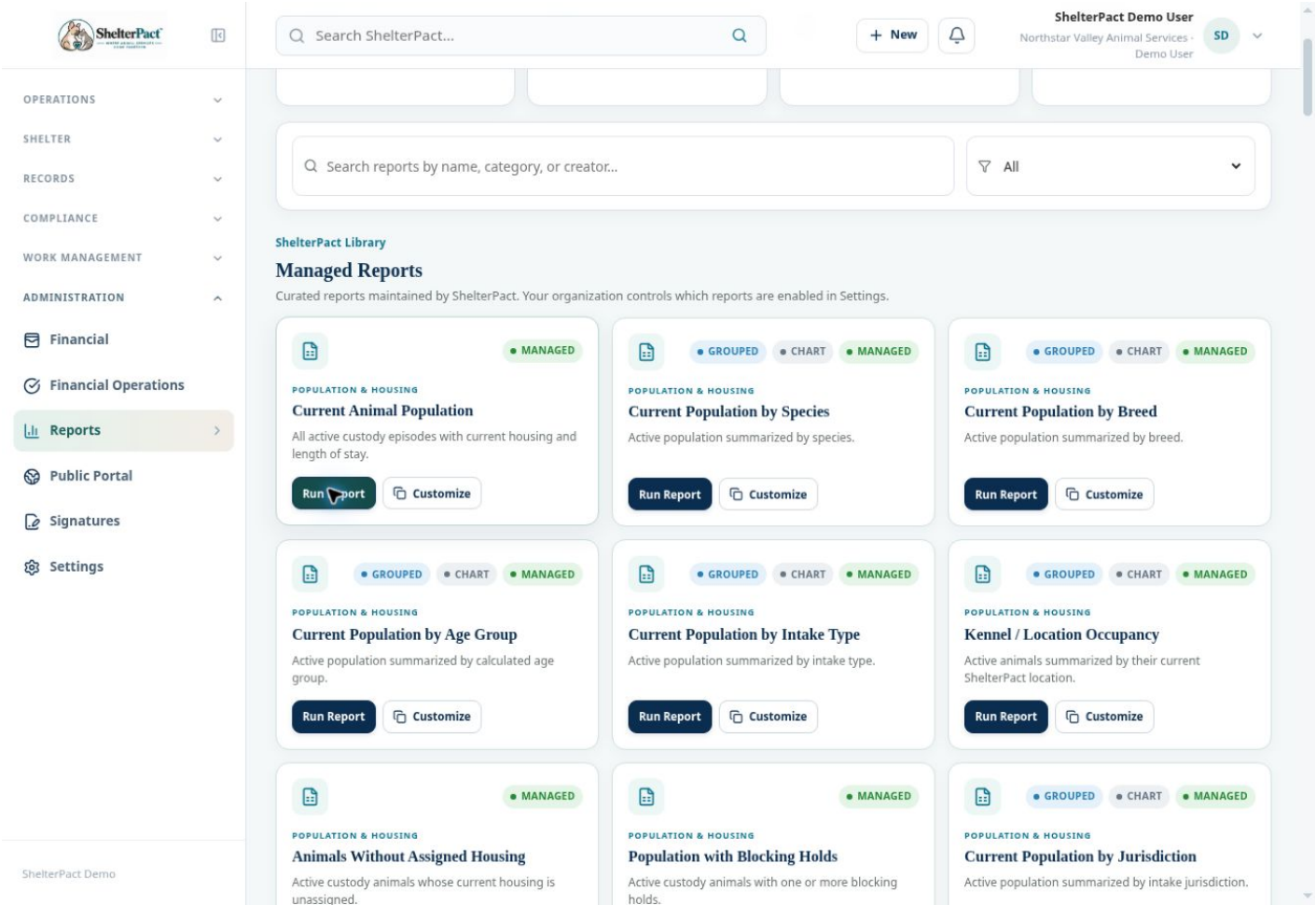


Figure 2. Report Results provides matching rows, record count, and CSV, Excel, and Print / PDF controls.



Practical checks

A report counting custody episodes can differ from a report counting permanent animal identities. Read the data source and definition.

Troubleshooting

What you see	What to check
The report is missing	Check search/category filters, enabled managed reports, module access, and permissions.
The result seems incorrect	Review the definition, status filters, date scope, and sample source records before changing it.

Build a Custom Report: Dogs in Custody Over 10 Days

This example was previewed in the demo using Intake / Custody, three filters, and descending length-of-stay sorting. It provides a reproducible pattern for a practical operational report.

Before you begin: Open Report Center / Create Report. Use a meaningful report name and choose whether it should be shared with authorized organization users.

Step-by-step instructions

1. At Report Setup, enter Dogs in Custody Over 10 Days, choose an appropriate category, and describe its purpose. Select Intake / Custody as the Data Source.
2. At Columns, select the fields staff need: animal number/name, species, intake date, custody status, days in custody, and current location. The example retained the source's default nine columns.
3. At Filters, select Add Filter. Choose Days in Custody, is greater than, and enter 10.
4. Add a second filter: Species equals Dog. Add a third: Custody Status equals Active.
5. At Group & Sort, leave Group By at No grouping for a detail list. Choose Sort By Days in Custody and Direction Descending.
6. Select Preview. Review the source, columns, three filters, grouping, summaries, sort, matching rows, and record count.
7. Check sample rows against their custody episodes. Dogs staying exactly 10 days are excluded by is greater than; use is at least for a different threshold.
8. Choose sharing and favorite settings intentionally, then Save Report when the definition is ready. Reopen it from Report Center and confirm its result and name.

Fields and meanings

Field / control	What to review
Data Source	Intake / Custody
Filter 1	Days in Custody is greater than 10
Filter 2	Species equals Dog
Filter 3	Custody Status equals Active
Sort	Days in Custody, Descending
Expected interpretation	A list of qualifying active episodes, not all historical dog identities.

Screenshots

Figure 1. Report Setup selects the approved data source. (part 1 of 2)



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Back to Report Center

Reporting Workspace

Create Custom Report

Build a reusable report from approved ShelterPact data without writing SQL.

1 Report Setup

2 Columns

3 Filters

4 Group & Sort

5 Preview & Save

Report Setup

Name the report and choose the ShelterPact data area it should use.

Report Name

Category

Example: Dogs in Custody Over 10 Days

Animals

Description

Explain what this report is used for.

Data Source

ANIMALS

Animals

Permanent animal identity and record information.

SHELTER OPERATIONS

Intake / Custody

Animal intake episodes, custody status, housing, and length of stay.

OUTCOMES

Outcomes

Adoption, reclaim, rescue transfer, euthanasia, and other outcome records.

SHELTER OPERATIONS

Holds / Quarantine

Legal, medical, quarantine, stray, and release restrictions.

MEDICAL

Medical

Vaccines, tests, treatments, medications, diagnoses, and medical alerts.

PEOPLE

People

Person records and contact information available to the organization.

FIELD SERVICES

Calls for Service

Dispatch and service-call workload and disposition information.

ENFORCEMENT

Cases / Enforcement

Enforcement cases, assignment, deadlines, and dispositions.

FINANCIAL

Financial Charges

Organization charges, fees, waivers, and balances.

Figure 1. Report Setup selects the approved data source. (part 2 of 2)

Sharing

☒ Share this report with other authorized users in my organization.

Favorite

☐ Pin this report as an organization favorite.

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Figure 2. Columns controls the fields included in the result.



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Reporting Workspace

Create Custom Report

Build a reusable report from approved ShelterPact data without writing SQL.

Report Setup

Columns

Filters

Group & Sort

Preview & Save

Choose Columns

Select the fields that should appear in the finished report. Calculated fields are included where available.

☒ Intake #
Text

☒ Animal #
Text

☒ Animal
Text

☒ Species
Select

☐ Breed
Text

☒ Intake Type
Select

☐ Intake Reason
Text

☒ Intake Date
Datetime

☒ Custody Status
Select

☒ Days in Custody
Number

☐ Age (Years)
Number

☐ Age Group
Select

☒ Current Location
Select

☐ Jurisdiction
Select

☐ Blocking Holds
Number

☐ Pickup Location Notes
Text

Selected Columns

1. Intake #
Text

2. Animal #
Text

3. Animal
Text

4. Species
Select

5. Intake Type
Select

6. Intake Date
Datetime

7. Custody Status
Select

8. Days in Custody
Number

9. Current Location
Select

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Figure 3. The example filters active dog custody episodes with more than 10 days in custody. (part 1 of 2)

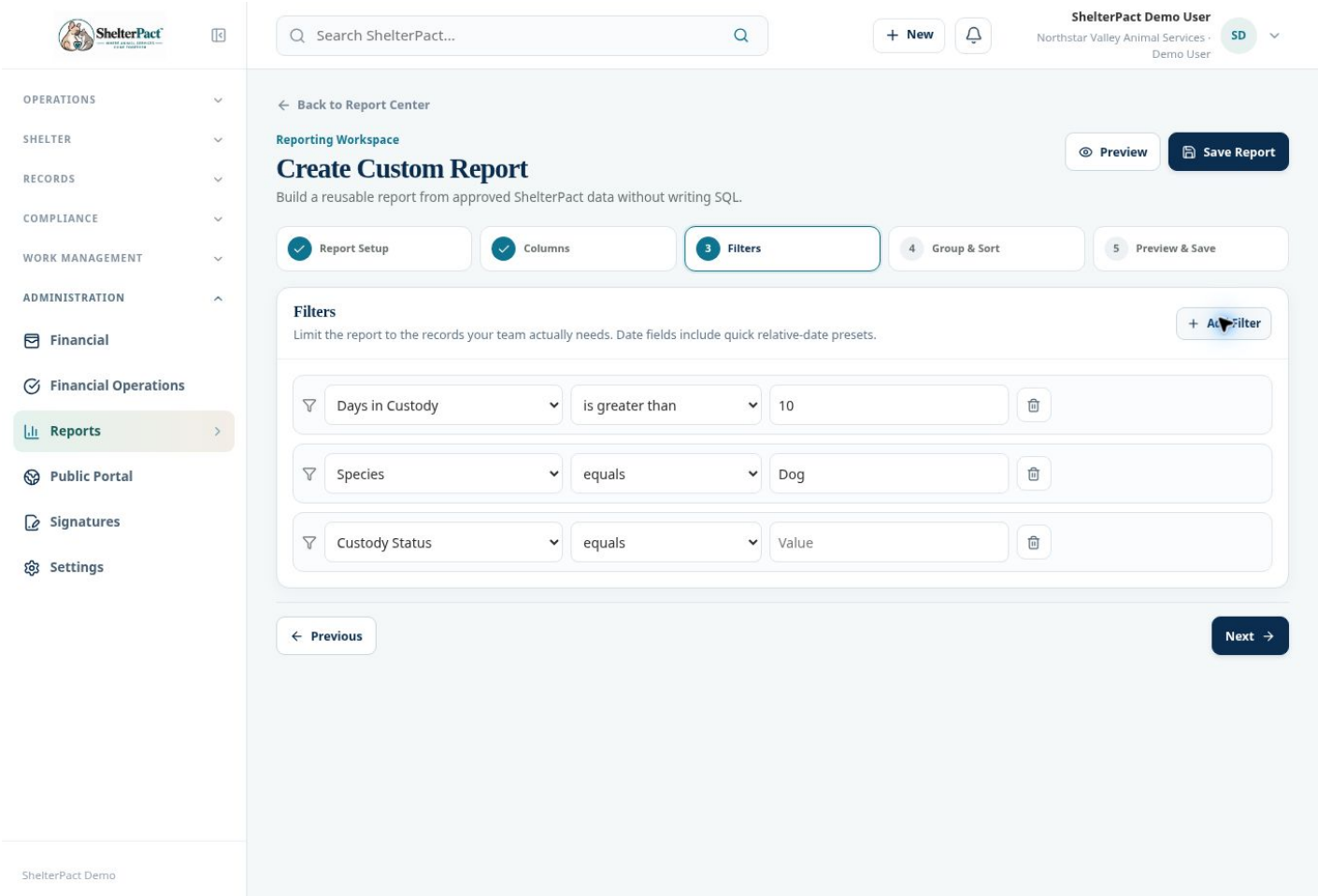


Figure 3. The example filters active dog custody episodes with more than 10 days in custody. (part 2 of 2)

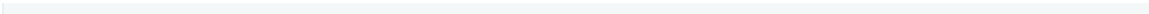


Figure 4. The detail list is sorted by Days in Custody descending.

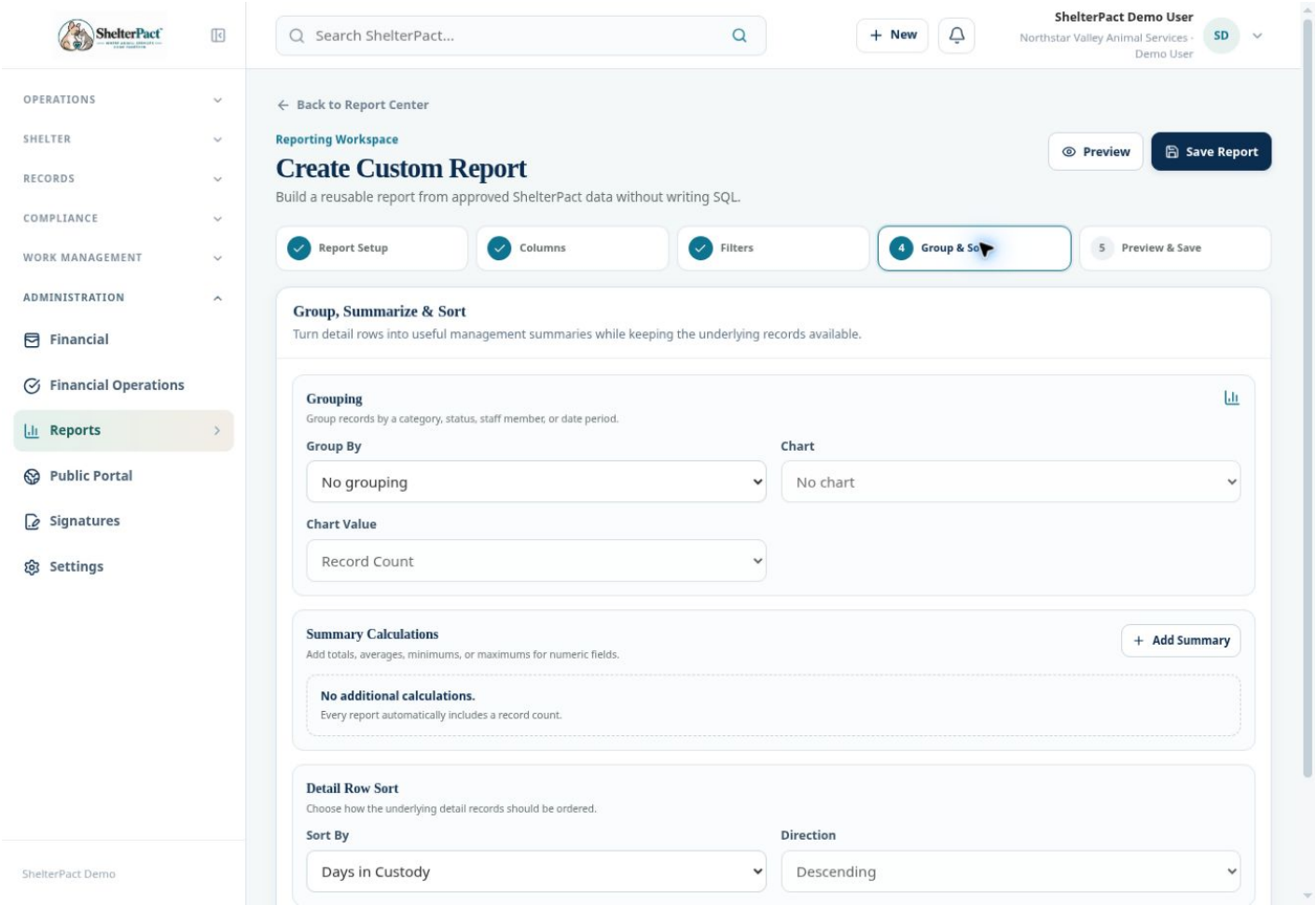


Figure 5. The verified demo preview returned eight matching active dog custody episodes.



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Reporting Workspace

Create Custom Report

Build a reusable report from approved ShelterPact data without writing SQL.

Report Setup

Columns

Filters

Group & Sort

Preview & Save

Preview

Save Report

Preview & Save

Validate detail rows, totals, grouping, and charts before saving the report.

Refresh Preview

DATA SOURCE
Intake / Custody

COLUMNS
9

FILTERS
3

GROUPING
None

SUMMARIES
1

SORT
Days in Custody - desc

8 MATCHING ROWS

RECORD COUNT
8

Intake #	Animal #	Animal	Species	Intake Type	Intake Date	Custody Status	Days in Custody	Current Location
DEMO-I-0001	DEMO-A-0001	Maple	Dog	Stray	9/2/2026, 9:54:15 AM	Active	40	Dog Ward A / D-A01
DEMO-I-0002	DEMO-A-0002	Scout	Dog	Stray	9/3/2026, 9:54:15 AM	Active	39	Dog Ward A / D-A02
DEMO-I-0003	DEMO-A-0003	Range r	Dog	Protective Custody	9/4/2026, 9:54:15 AM	Active	38	Dog Ward A / D-A03
DEMO-I-0004	DEMO-A-0004	Juniper	Dog	Owner Surrender	9/5/2026, 9:54:15 AM	Active	37	Dog Ward A / D-A04
DEMO-I-0005	DEMO-A-0005	Coppe r	Dog	Stray	9/6/2026, 9:54:15 AM	Active	36	Dog Ward A / D-A05

Practical checks

Demo counts change as data resets or records change. Verify the criteria and representative rows rather than expecting the same count in your organization.

Troubleshooting

What you see	What to check
Historical outcomes appear	Confirm the Active custody filter and source.
Cats or other species appear	Confirm Species equals Dog rather than a broad text filter.
The result is empty	Check spelling, operators, and actual source values in known records.

Group, Summarize, and Chart Report Data

Grouping turns detail records into summaries while retaining the underlying rows. Choose the correct source and numeric fields before adding totals or averages.

Before you begin: Open a custom report or create one with the required columns and filters. Decide the question you want the summary to answer.

Step-by-step instructions

1. At Group & Sort, select Group By, such as species, status, location, staff, or an available date period.
2. Select Chart when a supported grouped chart is appropriate. The inspected builder provides No chart or Bar chart and a Chart Value selector.
3. Use Add Summary for a supported total, average, minimum, or maximum on a numeric field. Record Count is included automatically.
4. Select a detail-row Sort By and Direction so the supporting list remains understandable.
5. Preview the report. Compare summary count and representative detail rows, and check whether a numeric measure represents days, an amount, or another unit.
6. Verify that your source supports the intended interpretation. Financial Charges measures assessed charges and balances; it should not be described as a payment-collection report.
7. Save only after summaries and charts answer the intended question. Give the report a description explaining its scope and units.

Screenshots

Figure 1. Group & Sort provides grouping, chart, summary calculations, and detail sorting.

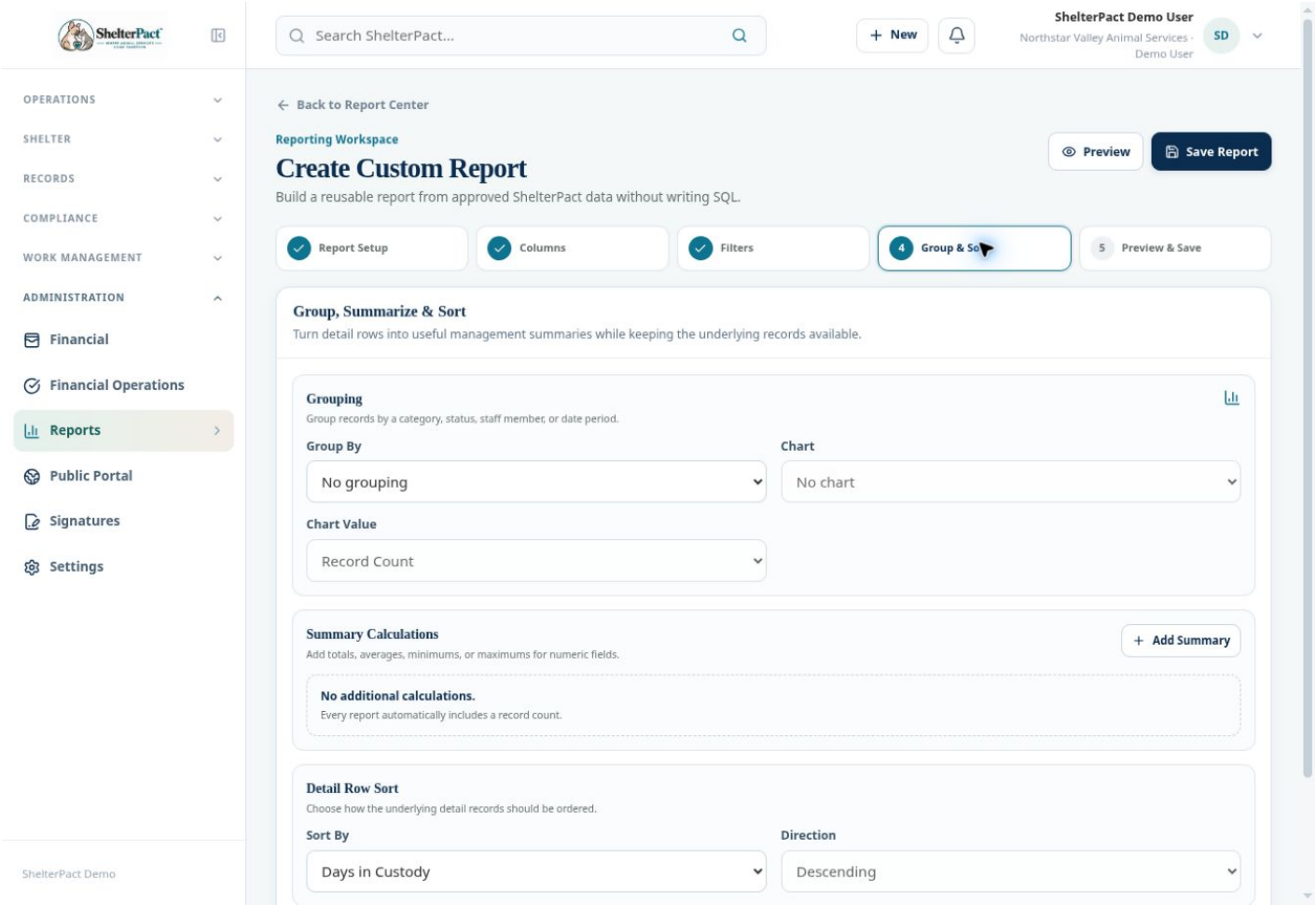


Figure 2. Preview displays the definition and supporting rows before saving.

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Report Setup

Columns

Filters

Group & Sort

Preview & Save

Preview & Save

Validate detail rows, totals, grouping, and charts before saving the report.

Refresh Preview

DATA SOURCE

Columns

Filters

Grouping

Summaries

Sort

Intake / Custody

9

3

None

1

Days in Custody - desc

8 MATCHING ROWS

RECORD COUNT

8

Intake #	Animal #	Animal	Species	Intake Type	Intake Date	Custody Status	Days in Custody	Current Location
DEMO-I-0001	DEMO-A-0001	Maple	Dog	Stray	9/2/2026, 9:54:15 AM	Active	40	Dog Ward A / D-A01
DEMO-I-0002	DEMO-A-0002	Scout	Dog	Stray	9/3/2026, 9:54:15 AM	Active	39	Dog Ward A / D-A02
DEMO-I-0003	DEMO-A-0003	Range r	Dog	Protective Custody	9/4/2026, 9:54:15 AM	Active	38	Dog Ward A / D-A03
DEMO-I-0004	DEMO-A-0004	Juniper	Dog	Owner Surrender	9/5/2026, 9:54:15 AM	Active	37	Dog Ward A / D-A04
DEMO-I-0005	DEMO-A-0005	Coppe r	Dog	Stray	9/6/2026, 9:54:15 AM	Active	36	Dog Ward A / D-A05

Practical checks

Summing days in custody is different from average length of stay. Choose the calculation that actually answers the question.

Troubleshooting

What you see	What to check
Chart controls are disabled	Choose a supported grouping first.
A total seems too large	Review the source's row unit, historical scope, filters, and the selected summary calculation.

Customize Reports and Control Organization Availability

Managed reports are maintained by ShelterPact; custom reports are organization definitions. Customize and Duplicate provide different starting points for organization-specific work.

Before you begin: Open Report Center. Editing, creation, sharing, export, and managed selection can require different permissions.

Step-by-step instructions

1. Find the managed report and read its definition. Use Customize when available to begin an organization-specific version.
2. For an existing custom report, use Edit to revise its definition or Duplicate when a separate definition is needed.
3. Review setup, columns, filters, grouping, and sort before changing them. Use Preview to validate the new interpretation.
4. Name and describe the report clearly, including the date or status scope. Review sharing with other authorized users and favorite settings.
5. Save the intended definition and verify it in Report Center. Confirm whether you changed the original or created a separate report.
6. For managed availability, open Settings / Managed Reports. Search or filter the library and review Selected and Available Now.
7. An authorized configuration manager can enable, disable, or restore defaults. Turning a managed report off removes availability; it does not delete source records or custom reports.

Screenshots

Figure 1. Managed reports offer Customize; custom reports provide Edit and Duplicate.

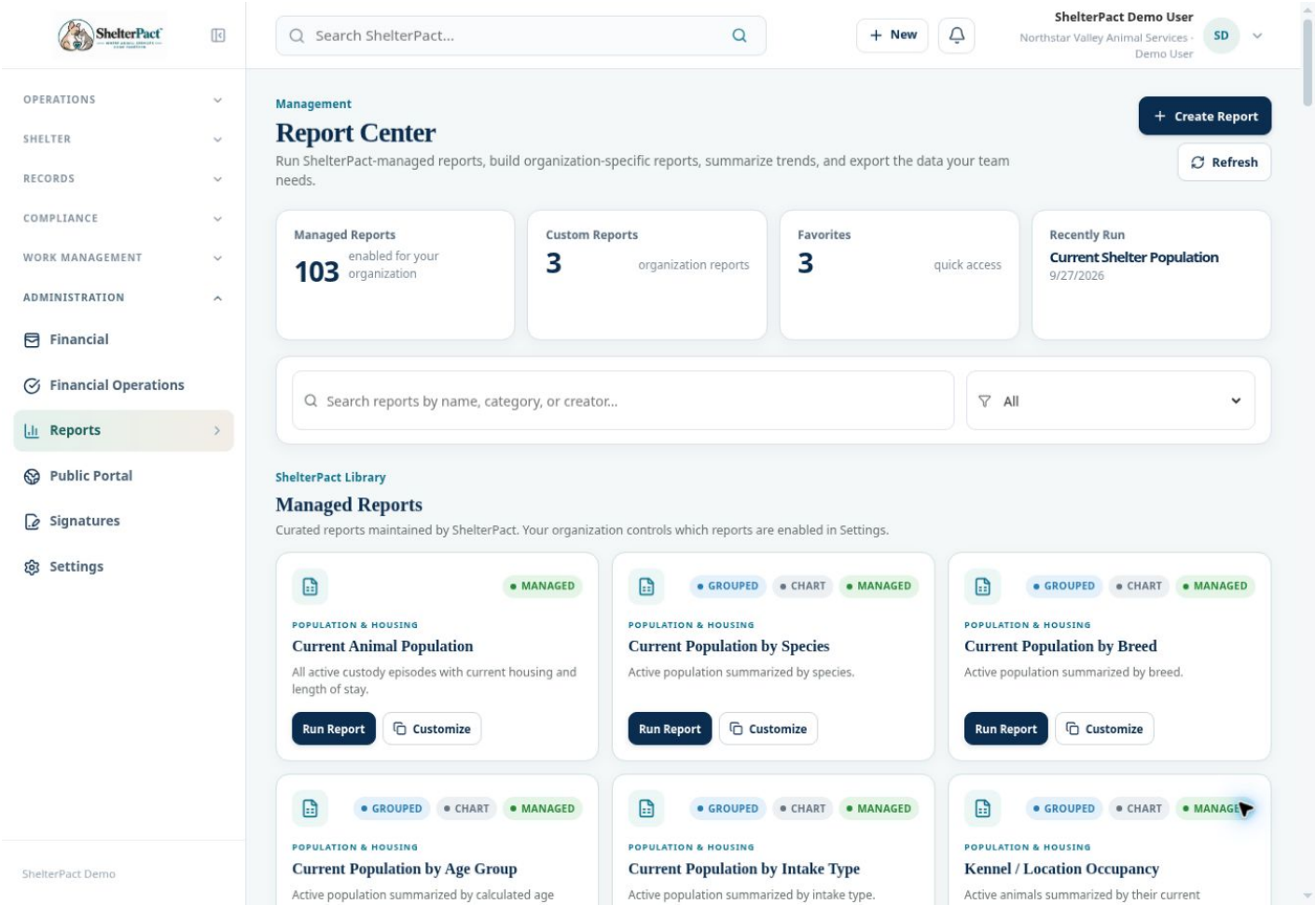
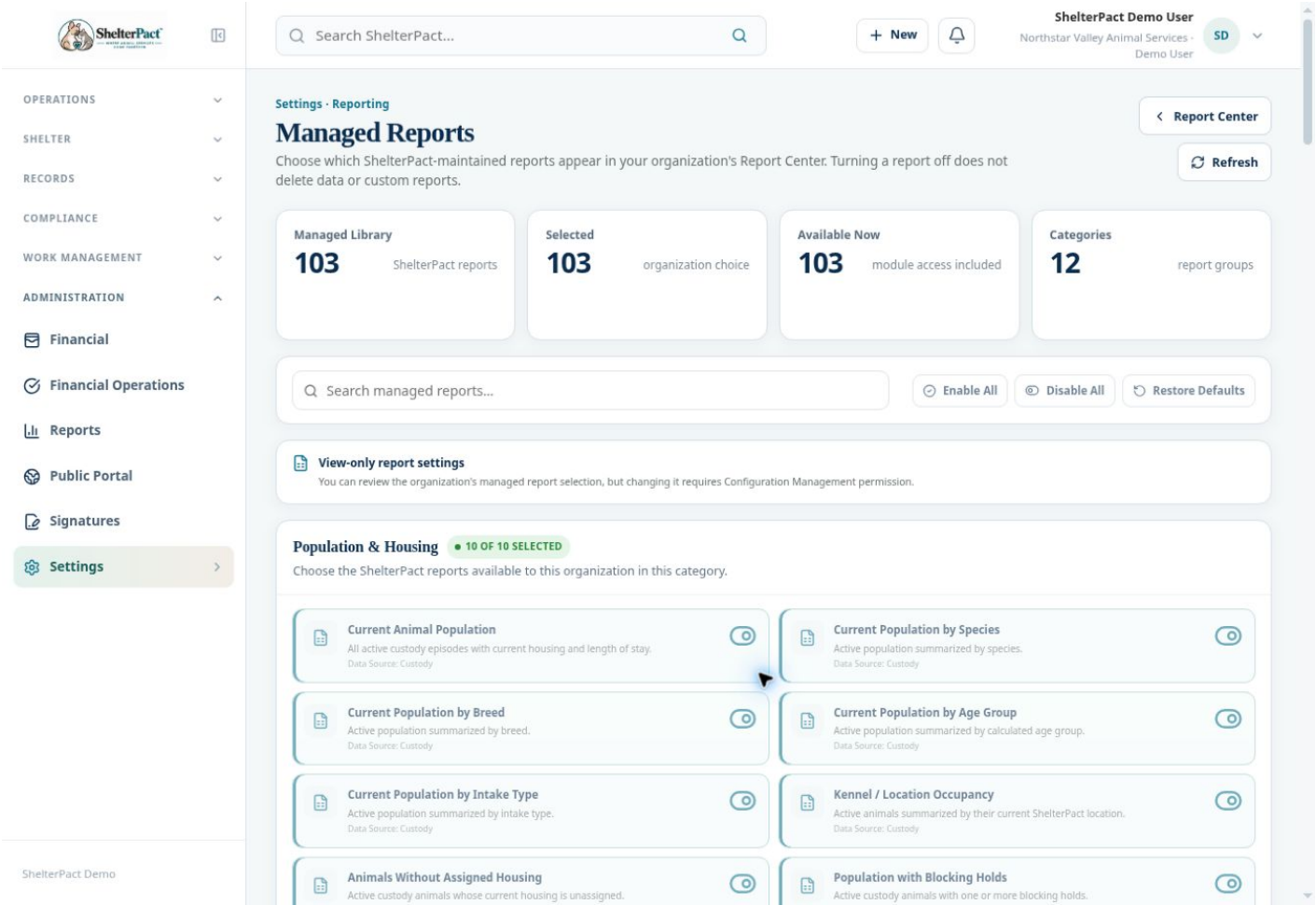


Figure 2. Managed report selection is distinct from data access and module availability.



Practical checks

Sharing a report definition does not expand the recipient's permissions to underlying data.

Troubleshooting

What you see	What to check
A selected report is still unavailable	Check required module access and data permissions.
The demo will not save a managed selection	The shared account has view-only report settings; a configuration manager is required for changes.