

Help Center

Just a click away!



Data Utilities

e-book

ChildPlus
Desktop



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childplus.com

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The Help Center and Agency Customization

The articles in the Help Center and videos in the Learning Library are based on the default setup of ChildPlus and assume full security access to all platforms, modules, features and fields. If you cannot find or access a feature referenced in an article, be aware that your agency's specific customization of ChildPlus determines:

- Your access to each platform
- Your access to specific modules or features
- Security or location restrictions for your level of access to ChildPlus
- Whether a module or feature has been turned on
- Which fields are available in each module
- The content of drop-down fields

Contact your ChildPlus administrator to verify your security access and the availability of a feature referenced in an article.

If you are a ChildPlus administrator and need to configure security access or turn on a feature, see [User Security Groups](#) or [contact us](#) for additional assistance.

Help Center Updates and ChildPlus Platforms

The Help Center is continually updated to reflect the current version of ChildPlus. Ensure that you are using the [latest version of ChildPlus](#) and referencing an article for the appropriate ChildPlus platform. Instructions for modules often differ between ChildPlus Online and ChildPlus Desktop and are unique for the Attendance App.

- To find out which version of ChildPlus you are using, see [About ChildPlus](#).
- For more information about the different platforms and how to access them, see [Platform Comparison](#).
- To learn about the differences between the modules in ChildPlus Desktop and ChildPlus Online, see [Module Comparison](#).

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Data Utilities

Data Utilities contains various utilities that can help streamline and monitor system data, including:



- Update defaults for In-Kind transactions
- Prepare your system for the next program term
- Streamline your data using merge utilities
- View user sign-in and sign-out history
- View changes that users make in modules throughout ChildPlus

In-Kind Defaults Utility

Use the **In-Kind Defaults Utility** to update the default In-Kind **Transaction** values for specific types of In-Kind volunteers. These changes only apply to **Transaction** defaults, not existing In-Kind **Transactions**.

To use the **In-Kind Defaults Utility** in ChildPlus Desktop:

1. Go to **ChildPlus Desktop >> Setup >> Data Utilities >> In-Kind Defaults Utility**.
2. Select the type of volunteer whose defaults you want to update from the **Volunteer Description** field.
3. Select or enter new values for the remaining **fields** as needed.

Field	Description
Volunteer Description	Select a new value for each applicable field to update volunteers who meet the criteria
Program	
Agency	
Site	
Classroom	
Quantity	 Select each field to update and enter a value to set as the default
Rate	
Units	
Type	 Select each field to update and select a value to set as the default
Service Area	



Unchecked fields will keep their current values.

4. Click **Update In-Kind Defaults**.

Merge Utilities

Use the following suite of utilities in ChildPlus to help streamline your data. Merging duplicate data into one record can prevent errors and extra data entry efforts that can occur when users choose the wrong record.

For example, let's say you have one resource called **Stephens, Patrick M.D.** and another called **Patrick Stephens M.D.** After verifying, if you determine that both records are for the same resource, you can eliminate future confusion by merging the two records into one.

Merge Community Resources

Use **Merge Community Resources** to merge duplicate or unnecessary resources.

To merge **Community Resources** in ChildPlus Desktop:

1. Go to **ChildPlus Desktop >> Setup >> Data Utilities >> Merge Utilities >> Merge Community Resources**.
2. In the left column, select the resource that you want to keep. All duplicate resources will be merged into the resource you select.
3. In the right column, select each resource that you want to merge into the main resource. Each resource that you select will be deleted after the merge.
4. Click **Merge**.
5. Enter **MERGE** to confirm that you want to merge the **Community Resources**.
6. Click **Merge**. ChildPlus displays a message confirming that the merge was successful.
7. Click **OK**.

Merge Dropdown Choices

Use **Merge Dropdown Choices** to merge duplicate or unnecessary drop-down choices.

1. Go to **ChildPlus Desktop >> Setup >> Data Utilities >> Merge Dropdown Choices**.
2. Select the **Drop-down Choice Type** that contains the drop-choices you want to merge.
3. In the left column, select the drop-down choice that you want to keep. All duplicate drop-down choices will be merged into the drop-down choice you select.
4. In the right column, select each drop-down choice that you want to merge into the main drop-down choice. Each drop-down choice that you select will be deleted after the merge.
5. Click **Merge**.
6. Enter **MERGE** to confirm that you want to merge the drop-down choices.
7. Click **Merge**. ChildPlus displays a message confirming that the merge was successful.
8. Click **OK**.

Merge Families

Use **Merge Families** to merge duplicate families.



This utility is designed to move all of your family members to a different family. If you need to just move one family member to a different family, see [Move a Family Member to a Different Family](#).

1. Go to **ChildPlus Desktop >> Setup >> Data Utilities >> Merge Families**.
2. Select the family that you want to keep. This family's information will be used for the new combined family.
3. Select the family that you want to remove. The information in this family's record will be deleted. ChildPlus will merge the members in this family with the family selected in **Family to Keep**.
4. Select whether to merge the **Family Services Events** of the family you are removing with the new combined family that you are creating.
5. Click **Merge**.
6. Enter **MERGE** to confirm that you want to merge the families.
7. Click **Merge**. ChildPlus opens the new combined family's record in the **Application** module.

Merge Health Event Types

Use **Merge Health Event Types** to merge duplicate or unnecessary **Health Event Types**.

1. Go to **ChildPlus Desktop >> Setup >> Data Utilities >> Merge Health Event Types**.
2. In the left column, select the **Health Event Type** that you want to keep. All duplicate **Health Event Types** will be merged into the **Event Type** you select.
3. In the right column, select each **Health Event Type** that you want to merge into the main **Event Type**. Each **Event Type** that you select will be deleted after the merge.
4. Click **Merge**.
5. Enter **MERGE** to confirm that you want to merge the **Event Types**.
6. Click **Merge**. ChildPlus displays a message confirming that the merge was successful.
7. Click **OK**.

Merge In-Kind Volunteers

Use **Merge In-Kind Volunteers** to merge duplicate In-Kind volunteers.

1. Go to **ChildPlus Desktop >> Setup >> Data Utilities >> Merge In-Kind Volunteers**.
2. Select the type of volunteer you want to keep.
 - If the volunteer is a family member, personnel or other person, enter their ChildPlus ID then click **Lookup**
 - If the volunteer is a Community Resource, select the resource from the list



You can find a volunteer's ChildPlus ID in **ChildPlus Online >> Management >> In-Kind >> Volunteer Information >> General Information** and **ChildPlus Desktop >> Management >> In-Kind >> Volunteer Information >> Information**.

3. Select the type of volunteer you want to remove.
 - If the volunteer is a family member, personnel or other person, enter their ChildPlus ID then click **Lookup**
 - If the volunteer is a Community Resource, select the resource from the list



You can find a volunteer's ChildPlus ID in **ChildPlus Online >> Management >> In-Kind >> Volunteer Information >> General Information** and **ChildPlus Desktop >> Management >> In-Kind >> Volunteer Information >> Information**.

4. Click **Merge In-Kind Volunteers**.
5. Click **OK** to confirm that you want to merge the volunteers. ChildPlus displays a message confirming that the merge was successful.
6. Click **OK**.

History

The suite of administrative tools in **History** provides a complete history of any changes made to your ChildPlus data, including the names of users who made changes.



ChildPlus administrators can configure the **Data History Log** in **ChildPlus Desktop >> Setup >> System Setup >> System Preferences >> Data History Log**.



Use **Report 1195 - Sign in/Sign Out History (Grid)** to track user sign-in/sign-out history.

Data History Log (Participant Information)

Use **Data History Log (Participant Information)** to track changes made in the **Services**, **DRDP Assessment** and **Entry Express** modules.

1. Go to **ChildPlus Desktop >> Setup >> Data Utilities >> History >> Data History Log (Participant Information)**.
2. Specify the time period to display the history for.
3. Specify if you want to display:
 - All transactions for families and family members
 - Transactions for a specific family (filter by **Family ID** or **Family Name**)



You can find a family's **Family ID** in **Services >> Application >> Family Information**.

- Transactions for specific family members (filter by name or **ChildPlus ID**)



You can find a family member's **ChildPlus ID** in **Services >> Application**.

4. Select each module to display the history for.
5. Select the type of data history to display.
6. Select each user whose changes you want to display. For example, if you select Jane Doe, then any records that Jane Doe modified will be included in the history.
7. Select the ChildPlus platform to display the history for.
8. Click **Find**.



You can view the **Data History Log** from within each **Services** module in ChildPlus Desktop. When you display the **Data History Log** from within a **Services** module, ChildPlus displays the data history for the selected participant and their family only.

Data History Log (Personnel Changes)

Use **Data History Log (Personnel Changes)** to track changes made in the **Personnel** module.

1. Go to **ChildPlus Desktop >> Setup >> Data Utilities >> History >> Data History Log (Personnel Changes)**.
2. Specify the time period to display the history for.
3. Click **OK**. Double-click a transaction to display all changes or click **View All Changes**.

Data History Log (System Configuration Changes)

Use **Data History Log (System Configuration Changes)** to track changes made in the **Security, Program Info** and **System Preferences** modules.

1. Go to **ChildPlus Desktop >> Setup >> Data Utilities >> History >> Data History Log (System Configuration Changes)**.
2. Specify the time period to display the history for.
3. Click **OK**. Double-click a transaction to display all changes or click **View All Changes**.

Data History Log Transactions

ChildPlus creates a new transaction record each time a user adds, changes or deletes data. Use this section to learn how common actions translate in the **Data History Log**.



ChildPlus administrators can configure the amount of time that transactions are stored in the **Data History Log** in **ChildPlus Desktop >> Setup >> System Preferences >> Data History Log**.

Modify a Field

When you change data stored in a field, both the **Old Value** (what it was) and the **New Value** (what you changed it to) display in the transaction record.

Select a Checkbox

When you select a checkbox, the transaction value is recorded as either **True** (the checkbox is selected) or **False** (the checkbox is deselected).


Add New Family

Each new family that you add to ChildPlus results in four transaction records. For example:

Row #	Record Description
1	Jane Smith was added as a person in ChildPlus
2	Jane Smith was listed as a member of the Smith family
3	Jane Smith was listed as the Primary Adult in the Smith family
4	The Smith family was added to ChildPlus

View Changes Made by ChildPlus

Certain fields may be modified or removed during an update to improve ChildPlus. You can use this feature to view any changes made to a participant's record as a result of these changes.

1. Go to **ChildPlus Desktop >> Services**.
2. Select a module for the participant whose changes you want to view.
3. Click **Data History Log**  or press **Alt + Y**.
4. Click **View changes made by ChildPlus**.
5. Select a date to view changes for.
6. Click **OK** to close the window.