

Help Center

Just a click away!



LiveReport

e-book

ChildPlus
Desktop



800.888.6674
childplus.com

© 2022 Management Information Technology USA, Inc. DBA ChildPlus Software. ChildPlus is a trademark of Management Information Technology USA, Inc.

Information in this document is subject to change without notice. Companies, names and data used in examples herein are fictitious unless otherwise noted.

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](#).

Table of Contents

LiveReport	6
Getting Started with LiveReport	7
Configure a New LiveReport	8
Create a New LiveReport	10
Add Fields to a LiveReport	11
Configure the Layout of a LiveReport	12
Rearrange a Column	12
Resize a Column	13
Sort a Column	13
Stack a Column	14
Generate Subtotals for a Column	15
Configure the Headers on a LiveReport	16
Header Defaults	16
Add a Field to a Header	19
Remove a Field from a Header	21
Remove a Header from a LiveReport	21
Fonts/Grid Lines	22
Modify Fonts on a LiveReport	22
Add Borders to a LiveReport	23
Configure Captions on a LiveReport	23
Apply a Page Break to a LiveReport	24
Page Setup	25
Configure Page Properties for a LiveReport	25
Remove Page Header Information from a LiveReport	25
Grouping	26
Add a New Group	26
Rearrange the Order of Groups	26
Remove a Group	27
Run a LiveReport	28

LiveReport

LiveReport provides a way to create customized reports for your agency's needs. Reports created with **LiveReport** can:

- Be edited to accommodate changes in reporting requirements
- Contain totals and subtotals
- Be limited to certain users

Getting Started with LiveReport

Before creating a new **LiveReport**, we recommend that you get familiar with the elements of a **LiveReport** and the samples included in ChildPlus.

Reports consist of different sections that control how information is organized and presented on a page. Each report contains the following sections:

Section	Description
Header	Conveys basic information about the data being reported and displays at the top of a LiveReport A report can have one or more header sections
Detail	Contains the actual data and displays in the main body of a LiveReport A report can only have one detail section
Caption	Displays as a header for each column of data in the detail section
Totals	Displays after the detail section on reports with subtotals

When creating a new **LiveReport**, first consider what the completed report should look like. For example, suppose a report is needed to show that sufficient data has been collected for all the necessary PIR fields during the application process. Then consider the following questions:

- What fields should be included on the report?
- What layout might users prefer for the report?

Configure a New LiveReport

Use this section to configure the general settings for a new **LiveReport**.

1. Go to **ChildPlus Desktop >> Module Setup >> LiveReport**.
2. Click **Add New LiveReport**.
3. Select one of the following:
 - **Start with a blank message:** create a new **LiveReport** from scratch
 - **Start with a copy of:** copy all settings from an existing **LiveReport**



Sample **LiveReports** cannot be edited. Select this option if you want to customize a sample **LiveReport**.

4. Click **OK**.
5. Complete the **fields**.

Field	Description
Number	Enter a number to assign to the LiveReport . This number can contain up to six alphanumeric characters
Name	Enter a name to assign to the LiveReport
 Category	Select a category. Categories are used to group similar reports and are based on the service areas in ChildPlus
Description	Enter a description for the LiveReport . ChildPlus displays this description at the bottom of the Reports window when you hover over the report name
Base this report on	Select the area of ChildPlus to base the LiveReport on. Your selection determines which database fields and headers will be available for you to add to the LiveReport
Select a specific type of information	Select the data type to base the LiveReport on. Your selection determines which database fields and headers will be available for you to add to the LiveReport
Select the Security Groups that are permitted to run this report	Select the Security Group(s) that you want to be able to run the LiveReport We recommend that you initially only grant the Admin group access to the LiveReport . Once you are ready for other users in your organization to access and run the LiveReport , you can grant access to additional Security Groups



ChildPlus administrators can configure the settings for this field in **ChildPlus Desktop >> Setup >> System Setup >> [Customize Dropdown Choices](#)**.

6. Do one of the following:
 - Click **Save** to stop configuring the **LiveReport** and return to it at a later time
 - Click **Next Step** to [build](#) the **LiveReport**

Create a New LiveReport

Once you have configured the general settings for a **LiveReport**, you can build and format the report.

Add Fields to a LiveReport

Use this section to add fields to a **LiveReport**.

1. Go to **ChildPlus Desktop >> Module Setup >> LiveReport**.
2. Select the **LiveReport** that you want to work with.
3. Select the section of the report to work with from the **Layout for the field**.



ChildPlus defaults to the detail level of the report. We recommend starting here since this is the level of report that will contain data.

4. In the **Database Fields** section on the left side of the window, click **Expand +** next to the group that contains the database field that you want to add.
5. Select a database field. If you are creating a worksheet or sign-in sheet, you can add **special fields** from the **Special Fields** group.

Field	Description
Blank	Inserts a blank row or column
Box	Inserts an empty text box
Current Date	Inserts the current date
Custom Text	Inserts one line of custom text
Custom Text (Multi-Line)	Inserts a field that can be used to enter an unlimited amount of custom text. This field can be useful for creating form letters
Underline	Inserts a line

6. Click **Add**. ChildPlus adds the field to the **Report Fields** section on the left side of the window.



All fields listed in the **Report Fields** section will display on the report.

7. Enter a new name for the field caption in the **Caption** field, if applicable.
8. Repeat steps 4-7 for each field that you want to add.
9. Click **Save**.



To remove a field from the report, select the field that you want to remove from the **Report Fields** section, then click **Remove**.

Configure the Layout of a LiveReport

Use this section to customize the layout of a **LiveReport**. You can rearrange the order of the columns, resize the widths of the columns, apply a sort order and subtotals.

1. Go to **ChildPlus Desktop >> Module Setup >> LiveReport**.
2. Select the **LiveReport** that you want to work with.
3. Go to the **Layout** tab.
4. Select the section of the report to work with from the **Layout for the** field.
5. Complete each action as needed.
 - [Rearrange a Column](#)
 - [Stack a Column](#)
 - [Resize a Column](#)
 - [Sort a Column](#)
 - [Generate Subtotals for a Column](#)
6. Click **Save**.

Rearrange a Column

Use this section to rearrange a column on a **LiveReport**.

1. Go to **ChildPlus Desktop >> Module Setup >> LiveReport**.
2. Select the **LiveReport** that you want to work with.
3. Go to the **Layout** tab.
4. Select the section of the report to work with from the **Layout for the** field.
5. Locate the column that you want to move.
6. Click and hold the column header.
7. Drag the column header across the header row. ChildPlus displays up and down arrows above and below the column header to indicate where you can place it.
8. Drop the column header.
9. Repeat steps 5-8 for each column that you want to move.
10. Click **Save**.

Resize a Column

Use this section to resize a column on a **LiveReport**.

1. Go to **ChildPlus Desktop >> Module Setup >> LiveReport**.
2. Select the **LiveReport** that you want to work with.
3. Go to the **Layout** tab.
4. Select the section of the report to work with from the **Layout for the** field.
5. Locate the column that you want to resize.
6. Hover your cursor over the right border of the column. ChildPlus will change the cursor from a pointer to a double-sided arrow.
7. Click and drag the column border to the left to decrease the width or to the right to increase the width.
8. Repeat steps 5-7 for each column that you want to resize.
9. Click **Save**.



To automatically resize a column width, right-click a column header and select **Best Fit**. This option automatically adjusts a column's width to fit the longest string of data in the field or column header.

Sort a Column

You can specify how you want to sort data on a **LiveReport** by selecting the columns that you want to sort on.

1. Go to **ChildPlus Desktop >> Module Setup >> LiveReport**.
2. Select the **LiveReport** that you want to work with.
3. Go to the **Layout** tab.
4. Select the section of the report to work with from the **Layout for the** field.
5. Locate the column that you want to sort.
6. Click the column header once to sort the column in ascending order or twice to sort the column in descending order. ChildPlus displays **Ascending ▲** or **Descending ▼** on the sorted column header and displays a summary of the sorted column(s) above the grid.
7. Press and hold **Shift** and repeat steps 5 and 6 for each additional column that you want to sort.
8. Click **Save**.



To remove the sorting on a column, press and hold **Ctrl** and click the column header.

Stack a Column

Use this section to stack a column on a **LiveReport**. Each column that you stack creates a row of data. This can be helpful if you want to fit more data on a report.

1. Go to **ChildPlus Desktop >> Module Setup >> LiveReport**.
2. Select the **LiveReport** that you want to work with.
3. Go to the **Layout** tab.
4. Select the section of the report to work with from the **Layout for the** field.
5. Locate the column that you want to stack.
6. Click and hold the column header.
7. Drag the column header above or below the header row. ChildPlus displays left and right arrows on the left and right sides of the column header row to indicate where you can place it.
8. Drop the column header.
9. Repeat steps 5-8 for each column that you want to stack.
10. Click **Save**.



There is no limit to the number of columns that you can stack. Columns can be stacked vertically or horizontally.

Generate Subtotals for a Column

Use this section to generate subtotals for a column on a **LiveReport**. The subtotal options available depend on the type of data in the column.

1. Go to **ChildPlus Desktop >> Module Setup >> LiveReport**.
2. Select the **LiveReport** that you want to work with.
3. Go to the **Layout** tab.
4. Select the section of the report to work with from the **Layout for the** field.
5. Locate the column that you want to generate subtotals for.
6. Right-click the column's **Right Click** cell at the bottom of the grid.
7. Select an **option**.

Option	Description
Average	Displays a numeric average for each of the records in the column
Count	Displays a numeric count of the number of records in the column
Count Empty	Displays the number of rows that are empty or have a blank value
Count Not Empty	Displays the number of rows that are NOT empty or do NOT have a blank value
Count Empty/Not Empty	Displays two values: <ul style="list-style-type: none">• The number of rows that are empty or have a blank value• The number of rows that are NOT empty or do NOT have a blank value
Distinct Count	Displays a count of the number of distinct, or unique, records in a column
Max	Displays the maximum record value in a column
Min	Displays the minimum record value in a column
Sum	Displays the sum of all records in a column
Sum by Value	Displays the sum of distinct records in a column, organized by value

8. Repeat steps 5-7 for each additional column that you want to generate totals for.
9. Click **Save**.

Configure the Headers on a LiveReport

Headers are used on reports to convey basic information about the data being reported. For example, headers typically display the agency, site, classroom or group of the subject being reported on.

Header Defaults

Setup >> Module Setup >> LiveReport

ChildPlus automatically populates each header on a **LiveReport** with default fields. You can [remove](#) these headers as needed.

Participant Reports

Report based on...	Headers				
	Agency	Site	Classroom	Participant	Other
Assessment	✓	✓	✓	✓	
Attendance (Individual)	✓	✓	✓		Attendance Date
Birth Record	✓	✓	✓	✓	
Community Resources	✓	✓	✓	✓	
Contacts	✓	✓	✓	✓	
Disability	✓	✓	✓	✓	
Disability Program	✓	✓	✓	✓	Disability
Enrollment History	✓	✓	✓		
Enrollment Information (current)	✓	✓	✓		
Family Members	✓	✓	✓		Family
Family Services Action	✓	✓	✓	✓	Family Services Event
Family Services Event	✓	✓	✓	✓	
Group	✓	✓	✓	✓	
Health Action	✓	✓	✓	✓	Health Event
Health Event	✓	✓	✓	✓	
IEP / Disability	✓	✓	✓	✓	
Mental Health Observation	✓	✓	✓	✓	
Mental Health Transaction	✓	✓	✓	✓	
Pregnancy	✓	✓	✓	✓	
Transportation	✓	✓	✓	✓	

In-Kind Reports

Report based on...	Headers				
	Agency	Site	Classroom	In-Kind	In-Kind Transactions
General In-Kind Volunteer Information		✓	✓		
In-Kind Transactions	✓	✓	✓	✓	
In-Kind Transactions and Funding	✓	✓	✓	✓	✓

Personnel Reports

Report based on...	Headers	
	Agency	Site
Funding Information	✓	✓
General Personnel Information	✓	✓
Phone Numbers	✓	✓

Add a Field to a Header

Use this section to add a field to a **LiveReport** header.

1. Go to **ChildPlus Desktop >> Module Setup >> LiveReport**.
2. Select the **LiveReport** that you want to work with.
3. Select the header to work with from the **Layout for the** field. ChildPlus automatically populates the header with **default fields**.

Header Name	Default Fields
Agency	Agency Name
Site	<ul style="list-style-type: none"> • Site Name • Site Label
Classroom	<ul style="list-style-type: none"> • Class Name • Teacher
Participant	<ul style="list-style-type: none"> • Birthday • Name
In-Kind	Volunteer Name
In-Kind Transactions	<ul style="list-style-type: none"> • Service Description • Service Type • Transaction Date
Attendance Date	Attendance Date
Disability	<ul style="list-style-type: none"> • Diagnosis • Diagnosis Date
Family	Family Name
Family Service Event	<ul style="list-style-type: none"> • Event Type • Initial Date
Health Event	<ul style="list-style-type: none"> • Event Type • Event Date
Personnel	Name

4. In the **Database Fields** section on the left side of the window, click **Expand** + next to the group that contains the database field that you want to add.
5. Select a database field.
6. Click **Add**. ChildPlus adds the field to the **Report Fields** section on the left side of the window.



All fields listed in the **Report Fields** section will display on the report header.

7. Enter a new name for the field caption in the **Caption** field, if applicable.
8. Repeat steps 4-7 for each database field that you want to add.
9. Click **Save**.

Remove a Field from a Header

Use this section to remove a field from a **LiveReport** header.

1. Go to **ChildPlus Desktop >> Module Setup >> LiveReport**.
2. Select the **LiveReport** that you want to work with.
3. Select the header to work with from the **Layout for the** field.
4. Select the field that you want to remove from the **Report Fields** section.
5. Click **Remove**.
6. Repeat steps 4-5 for each database field that you want to remove.
7. Click **Save**.

Remove a Header from a LiveReport

Use this section to remove a header from a **LiveReport**.

1. Go to **ChildPlus Desktop >> Module Setup >> LiveReport**.
2. Select the **LiveReport** that you want to work with.
3. Click **Advanced**.
4. Select the header that you want to remove.
5. Click **Delete**.
6. Click **Yes** to confirm that you want to delete the header.
7. Click **OK** to return to the **LiveReport** setup.

Fonts/Grid Lines

Use the options in this section to modify fonts and add grid lines to a **LiveReport**.

Modify Fonts on a LiveReport

Use this section to modify the fonts on a **LiveReport**.

1. Go to **ChildPlus Desktop >> Module Setup >> LiveReport**.
2. Select the **LiveReport** that you want to work with.
3. Go to the **Fonts/Grid Lines** tab.
4. Select the section of the report to work with from the **Layout for the** field.
5. Click **Change** next to the report element you want to modify.
6. Select new options for the font. You can edit the font, font style and font size.
ChildPlus uses the following defaults on all **LiveReports**:

Header Name	Font	Size
Captions	Arial + bold	9pt
Field Values	Arial	8pt
Subtotals	Arial	8pt

7. Repeat steps 4-6 for each element that you want to modify fonts for.
8. Click **OK**.
9. Click **Save**.

Add Borders to a LiveReport

Use this section to add borders to a **LiveReport**. By default, reports created using **LiveReport** do not contain any borders. You can add borders to help make data easier to read.

1. Go to **ChildPlus Desktop >> Module Setup >> LiveReport**.
2. Select the **LiveReport** that you want to work with.
3. Go to the **Fonts/Grid Lines** tab.
4. Select the section of the report to work with from the **Layout for the** field.
5. Select an **option** from the **Borders** field for the element you want to apply borders to.

Option	Description
No Borders	ChildPlus does not apply a border. This is the default setting for LiveReports
Borders around every row	ChildPlus applies a border around each row of data for the selected element
Borders around every field	ChildPlus applies a border around each field of data for the selected element

6. Repeat steps 2-5 for each element that you want to apply borders to.
7. Click **Save**.

Configure Captions on a LiveReport

Use this section to customize how captions display on a **LiveReport**.

1. Go to **ChildPlus Desktop >> Module Setup >> LiveReport**.
2. Select the **LiveReport** that you want to work with.
3. Go to the **Fonts/Grid Lines** tab.
4. Select the section of the report to work with from the **Layout for the** field.
5. Select the following options for the section as needed:
 - **Show caption(s)**
 - **Repeat caption(s) and value(s) on each page if section takes multiple pages**
6. Repeat steps 4-5 for each section of the report that you want to configure captions for.
7. Click **Save**.

Apply a Page Break to a LiveReport

You can apply a page break after each section of a **LiveReport**.

1. Go to **ChildPlus Desktop >> Module Setup >> LiveReport**.
2. Select the **LiveReport** that you want to work with.
3. Go to the **Fonts/Grid Lines** tab.
4. Select the section of the report to work with from the **Layout for the** field.
5. Select **Page break after group**.
6. Repeat steps 4-5 for each section of the report that you want to apply a page break to.
7. Click **Save**.

Page Setup

Use **Page Setup** to configure page properties for a **LiveReport**, including page orientation, page size and whether to display information in the header.

Configure Page Properties for a LiveReport

Use this section to configure page properties for a **LiveReport**.

1. Go to **ChildPlus Desktop >> Module Setup >> LiveReport**.
2. Select the **LiveReport** that you want to work with.
3. Click **Page Setup**.
4. Select the options that you want to apply to the report from the **Page Layout, Paper Size** and **Default Report** sections.



Summary is only available as an option when a report contains totals.

5. Click **OK**.
6. Click **Save**.

Remove Page Header Information from a LiveReport

A **LiveReport** displays basic information in the page header by default (for example, the time and date that the report was run and the name and number of the report). You can choose to prevent a **LiveReport** from displaying this information.

1. Go to **ChildPlus Desktop >> Module Setup >> LiveReport**.
2. Select the **LiveReport** that you want to work with.
3. Click **Page Setup**.
4. In the **Page Header** section, select each option associated with the header element that you want to remove from the report.
5. Click **OK**.

Grouping

Use **Grouping** to configure what data displays on a **LiveReport** and in what order. **Grouping** also determines what options are available in the **Layout for the** field.

Add a New Group

Use this section to add a new group to a **LiveReport**. Once you add a group to a **LiveReport**, you can select it as an option in the **Layout for the** field.

1. Go to **ChildPlus Desktop >> Module Setup >> LiveReport**.
2. Select the **LiveReport** that you want to work with.
3. Click **Advanced**.
4. Click **Add**.
5. Enter a name for the group.
6. In the **Database Fields** section on the left side of the window, click **Expand +** next to the group that contains the database field that you want to add.
7. Select a database field.
8. Click **Add**. ChildPlus adds the field to the **Report Fields** section on the left side of the window.



All fields listed in the **Report Fields** section will display on the report header.

9. Enter a new name for the field caption in the **Caption** field, if applicable.
10. Repeat steps 6-9 for each database field that you want to add to the group.
11. Click **OK**.
12. Click **OK** to save your changes and close the window.



The last group in the list displays as the detail section of the report while all preceding groups display as headers. You can [rearrange](#) the groups as needed. For more information about the sections of a report, see [Section](#) on page 7.

Rearrange the Order of Groups

Use this section to rearrange the order in which groups of data display on a **LiveReport**.

1. Go to **ChildPlus Desktop >> Module Setup >> LiveReport**.
2. Select the **LiveReport** that you want to work with.
3. Click **Advanced**.
4. Select a group that you want to move.
5. Use the up and down arrows on the right side of the window to move the group in the list.
6. Repeat steps 4-5 for each additional group that you want to move.
7. Click **OK** to save your changes and close the window.

Remove a Group

Use this section to remove a group from a **LiveReport**. When you remove a group from a **LiveReport**, ChildPlus will no longer display it as an option in the **Layout for the** field.

1. Go to **ChildPlus Desktop >> Module Setup >> LiveReport**.
2. Select the **LiveReport** that you want to work with.
3. Click **Advanced**.
4. Select the group that you want to delete.
5. Click **Delete**.
6. Click **Yes** to confirm that you want to delete the group.
7. Click **OK** to save your changes and close the window.

Run a LiveReport

Use this section to run a **LiveReport**.

1. Go to **ChildPlus Desktop >> Module Setup >> LiveReport**.
2. Select the **LiveReport** that you want to view.
3. Click **Preview**. ChildPlus opens the report setup window for the **LiveReport** in **Reports**.
4. Select an option for each applicable filter.
5. Click one of the following options:
 - **Export**: save the **LiveReport** as a selected file type
 - **View in Grid**: display the **LiveReport** in grid format
 - **Preview**: display the print preview for the **LiveReport**
 - **Print**: send the **LiveReport** directly to your printer



You can also run a **LiveReport** through **ChildPlus Desktop >> Reports >> LiveReport**. For more information, see [Run a Report](#).

Delete a LiveReport

Use this section to delete a **LiveReport**.

1. Go to **ChildPlus Desktop >> Module Setup >> LiveReport**.
2. Select the **LiveReport** that you want to delete.
3. Click **Delete LiveReport**.
4. Click **Yes** to confirm that you want to delete the **LiveReport**.