Merging person records

Person Merge involves the combination of two person records (i.e. two different person IDs) into one person ID.

In a person merge, the From Person Record is transferred to the To Person Record and the From person ID is then deleted.

- The basic person information (name, address, contact information) of the To Person Record is kept. The basic person information of the From Person Record is discarded.
- Other data (such as roles, role history, match information etc etc) is combined for the two records, wherever possible.

Merges are scheduled using this page for later overnight processing. However, depending on the number of merges there are to process, a scheduled merge may not occur for several days.

This function comes in handy when many records exist for the same person in the system. To avoid data duplication, check for an existing Person Record when adding a new person record to reduce the chance of duplication.

Very Important!! There is no automated process to 'de-merge' records that have been me You should make absolutely sure that the two IDs you wish to merge re	erged in error. late to the same person before adding a merge to the list.
The system has no way of detecting incorrect merges, and does not prevent may be a valid case).	adding of two completely different names (as in some cases, this
Merging two unrelated records will result in the To Person Record receiving u and match data.	nintended data, and the From Person Record losing all personal
Person Merge Request	
Please read the Help section before scheduling merges. Incorrect merges can result in loss of personal and Please ensure that the To Person ID is the record with the most up to date personal information, as this is th records.	match data. e information that will be retained. Match information and roles are kept from both
Person ID:	To Person Record Person ID:
	Look Up

The Person Merge Request Screen is where you can:

- · Enter the From and To Person IDs in the respective edit boxes.
- Click the Look up button to check that the Person IDs are valid IDs, and check that the records that display are indeed the records you wish to merge.
- Once you are sure you wish to merge the two Person Records, click Submit Merge to add the merge to the Merge List.
- Click OK on the confirmation popup. The system validates whether the merge can be added. In particular, both IDs must be associated with a child organisation of the current user's organisation.
- If the merge request is successful, you should see confirmation of the merge request on the screen.

	This merge has been submitted and has been approved. You can review the status of all submitted merges via the Person Merge List.
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From Persor	n Record						To Person Record
Person ID:	1318017					Person ID:	1318018
							Look Up
Person ID:	1318017						Person ID: 1318018
Name Lanven Theophi	Org	- 10/10/1025	Record Last Updated	Name	Org Cantral Munay roctball National Langue	IT/OF/DELL	Record Last Updated
							Submit Merge

The merge request is then added to Person Merge List in the filter AWAITING APPROVAL. See Manage the Person Merge List below.

To view the Person Merge List, click the View existing merge request link.

Person N	/lerge										
⊠ Submit new	merge reques	t									
Please read th	he help topic b	efore scheduling merges. Ir	ncorrect merges ca	in result in loss of per	sonal and mat	ch data.					
Filter by status	: AWAITING	S APPROVAL 🗸									
MERGE #	FROM ID	FROM NAME	FROM DOB	FROM ADDR.	TO ID	NAME	TO DOB	TO ADDR.	SELECT		
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ERME	19412-10	rande rusel	20,011,0077	Builauto (Nither)	2030139	tutale sociel	26/13/1877	table (restrict)		Remove	Approve
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TTUS	299,891	Lodi Jemes	264897949	5aba # 1043	304036	led Lama	2010/19/0	5,6,49,6,2,3		Remove	Approve
1 2 3 4	5 > 1	Last »								Page 1 of (5 (201 items)

🛓 Download merge list

Approve Selected Records

View the Person Merge List by status (dropdown list Filter by status).
 Manage the Person Merge List according to the table below.
 Click the Download merge list link if you wish to download the merge list.

Merge Num	An identifier for the merge
From ID, From Name, From DOB, From Address	The 'From' record details (this record will be merged into the 'To' record).
To ID, To Name, To DOB, To Address	The 'To' record details (this is the record that will be kept after the merge).
Date Created (for Merge Completed records only)	Date the merge was added to the list (local time).
Date Executed (for Merge Completed/Unsuccessful records only)	Date the merge was succesfully completed (if in MERGED COMPLETED state) or
	date the merge was attempted (if in MERGED UNSUCCESSFUL) state.

Filter by status	
AWAITING APPROVAL	These are merges that have not yet been approved, and have therefore not yet occurred.
	Approve: Pending (awaiting approval) merges can be approved on the list.
	 Click the corresponding Approve link for a single merge request in the list. Click the Select checkbox for multiple merge requests and then click the Approve Selected Records button at the bottom of the screen.
	Remove: Pending merges can be removed from the list by clicking the Remove link.
APPROVED - PENDING	Merges that have not yet occurred. Pending merges can be removed from the list by clicking the Remove link.
MERGE COMPLETED	Merges that have been successfully completed.
MERGE UNSUCCESSFUL	Merges that were attempted, but failed for some reason. These should be resolved by contacting support.

You can sort on any column in the Person Merge List by clicking on the column heading.