

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 merged in error.

You should make **absolutely sure** that the two IDs you wish to merge relate to the same person before adding a merge to the list.

The system has no way of detecting incorrect merges, and does not prevent adding of two completely different names (as in some cases, this may be a valid case).

Merging two unrelated records will result in the To Person Record receiving unintended data, and the From Person Record losing all personal and match data.

Person Merge Request ?

[View existing merge requests](#)

Please read the Help section before scheduling merges. Incorrect merges can result in loss of personal and match data.

Please ensure that the To Person ID is the record with the most up to date personal information, as this is the information that will be retained. Match information and roles are kept from both records.

From Person Record

To Person Record

Person ID:

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.

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

Person Merge

Please read the help topic before scheduling merges. Incorrect merges can result in loss of personal and match data.

MERGE #	FROM ID	FROM NAME	FROM DOB	FROM ADDR.	TO ID	NAME	TO DOB	TO ADDR.	SELECT		
F14007	9140017	Marcus Wright	19/03/1995	Salsbury (WV)	4130001	Marcus Wright	19/03/1995	Salsbury (WV)	<input type="checkbox"/>	Remove	Approve
F14771	9990048	Marshall Powell	28/02/1997	Salsbury (WV)	2000018	Marshall Powell	28/02/1997	Salsbury (WV)	<input type="checkbox"/>	Remove	Approve
F14718	9620230	Umaria Yusuf	11/03/1993	Salsbury (WV)	9120075	Umaria Yusuf	11/03/1993	Salsbury (WV)	<input type="checkbox"/>	Remove	Approve
F14785	9770045	Emilia Jodi Brownson	05/04/1999	Salsbury (WV)	4800023	Emilia Jodi Brownson	05/04/1999	Salsbury (WV)	<input type="checkbox"/>	Remove	Approve
F14976	8770033	Edin Casadein	01/01/2000	Salsbury (WV)	2000024	Edin Casadein	01/01/2000	Salsbury (WV)	<input type="checkbox"/>	Remove	Approve
F14973	2890235	Grace Weston	01/01/2000	Salsbury (WV)	1110021	Grace Weston	01/01/2000	Salsbury (WV)	<input type="checkbox"/>	Remove	Approve
F14974	7940070	Grace Weston	01/01/2000	Salsbury (WV)	1730001	Grace Weston	01/01/2000	Salsbury (WV)	<input type="checkbox"/>	Remove	Approve
F14975	0680034	Grace Weston	01/01/2000	Salsbury (WV)	1730001	Grace Weston	01/01/2000	Salsbury (WV)	<input type="checkbox"/>	Remove	Approve
F14981	2890236	Elysha Hollingsworth	01/01/2000	Salsbury (WV)	0710018	Elysha Hollingsworth	01/01/2000	Salsbury (WV)	<input type="checkbox"/>	Remove	Approve
F14978	7940070	Grace Weston	01/01/2000	Salsbury (WV)	2000026	Grace Weston	01/01/2000	Salsbury (WV)	<input type="checkbox"/>	Remove	Approve
F14988	0810132	Lacy Neubacker	01/01/2000	Salsbury (WV)	1031004	Lacy Neubacker	01/01/2000	Salsbury (WV)	<input type="checkbox"/>	Remove	Approve

Download merge list

1. View the Person Merge List by status (dropdown list **Filter by status**).
2. Manage the Person Merge List according to the table below.
3. 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 successfully completed (if in MERGED COMPLETED state) or date the merge was attempted (if in MERGED UNSUCCESSFUL) state.

Filter by status	
AWAITING APPROVAL	<p>These are merges that have not yet been approved, and have therefore not yet occurred.</p> <p>Approve: Pending (awaiting approval) merges can be approved on the list:</p> <ul style="list-style-type: none"> 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. <p>Remove: Pending merges can be removed from the list by clicking the Remove link.</p>
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.