Merging Duplicate Individuals Using FamilyInsight

Topics covered in this lesson:

Overview

Very few of us can boast of not having any duplicates in our files unless we just finished using the **Merge** mode of FamilyInsight. Therefore, make it a habit to periodically open your records in the Merge mode and resolve any possible duplicates that may appear on the list. This is especially important after importing records from a GEDCOM. If you check for duplicates each time you import records, the job remains manageable and so does the size of your file.

For step-by-step guidance while in the **Merge** mode, click the **Guide Me** button in the **Toolbar**. The instructions change depending upon what actions you have already preformed and/or which person is selected (highlighted).

Opening

Open FamilyInsight and choose **Merge** from the **How would you like to start?** window. If you already have your file open in FamilyInsight, go to the **Mode** menu on the **Menu** bar and choose **Merge**. For complete details on opening FamilyInsight, please read the Getting Started lesson under the headings, **Opening from PAF** and **Opening from the Desktop Icon**.

Sort, Find and Filter Records

Sort

When you select the Merge mode, FamilyInsight analyzes your records for possible duplicate individuals and pairs them in the **Individual List** window. Every person on the list comes from your file. The names in the Primary name column have a lower RIN than the names they are coupled within the Secondary name column.

To assist you in evaluating the likelihood of two records being a match, FamilyInsight marks their probability with a percentage rating. Records with many pieces of matching data receive a higher percentage rating than records with only a few pieces of matching information. Please do not automatically discount names with a low percentage rating. One record may have a great deal of data and the other record only a small bit of data but the information that matches may be identical and enough for you to recognize them as duplicate records. Carefully evaluate each possible match before you merge records or mark them as **Not A Match** or **Research**.

Each pair of possible duplicates is listed in order of their **% match** probability. The **% Match** column is located on the far right of the **Individual List** window. You can change the sort order by clicking on one of the column headings at the top of the Individual List. You may also change the sort order by clicking on the dropdown arrow for the **Sort by** option on the **Navigation Toolbar** and choosing your preference. Your sort by options are, Status, Primary RIN, Primary Surname or Primary Given Name, Secondary RIN, Secondary Surname or Secondary Primary Name, or % Match.

Find

- To find a specific name or RIN, click your cursor into the **Find** field in the **Navigation Toolbar** and type the name or RIN you need.
- The highlight goes to the first occurrence of the name or RIN in the **Individuals List** window.
- Click the **Find Next** button to jump to the next occurrence of the name or RIN.
- After moving to other entries, you may click on the **Find Previous** button to return to the previous entries that match your request.

Filter

You may select one of four filters that control what names appear on the **Individual List** The choices are:

- **Normal** – Default view. Shows all the individuals that are possible matches and those you previously marked for **Research**. **Note:** Pairs marked for **Research** are still considered possible duplicates and may be merged or marked as **Not A Match** after you finish researching.
- **Show all Not A Match** – Shows all the records shown in the **Normal** view plus the records you previously marked as **Not A Match**.
- **Hide Research** – Shows only those matches that have not been marked for **Research**.
- **Show Research Only** – Displays those pairs you marked for **Research**.

Preferences

You may select preferences for Matching. To review or change your preference settings, do the following:

- Click on **Edit** in the **Menu** bar and choose **Preferences**.
  *__Macintosh Users__ – You will need to go to the **FamilyInsight** Menu bar option and select **Preferences**.
- Select the **Match** tab.
  - You can select your preferences for the matching threshold (the percentage probability of match) you wish to see on your possible merge list. The default setting is 0 %.

- You can also set to ignore case when matching

Comparing and Merging Records

The **Individual List** contains the individuals that are possible candidates for merging. Every name that appears on this list is from your records. When you select a pair, the information about each individual appears in the **Details** window at the bottom of the screen.

Comparing and Viewing Data

- Select a pair of individuals by clicking on their row. You can move through the Individual List using the **Next** and **Previous** icons, the up and down arrow keys on your keyboard, or by clicking on an individual.
- Records are updated from the right side (Secondary) to the left side (Primary).
- After selecting a pair, you may switch the primary record with the secondary record by clicking the **Switch** icon, using the Shortcut keys of Control + W, or selecting **Switch** from the Action menu.
- Compare the information in the fields highlighted in pink. This highlighting indicates differences.
- Evaluate the information in the fields highlighted in green. This highlighting indicates that there is no information in the corresponding field in the primary file.
- You can also compare how the people fit in the pedigree by choosing the **Primary** or **Secondary Pedigree** tab at the bottom of the **Pedigree** window.
- You can move around in a pedigree using the pedigree scroll bar and arrows.

Merging Records

After deciding that the selected pair of individuals are duplicates, **make sure that the information you want to merge is checked.** If there is information in the right hand record (Secondary) that is missing in the left hand record (Primary), it is checked by default. You may check or uncheck any information so that you only transfer the information you want.

Your file has the ability to store more than one set of dates and places for a person's birth, christening, marriage, death and burial. These additional life events appear in a section called **Other Events**. Therefore, if you find conflicting data, you do not have to choose to keep one set of information and lose the other. Once you select the information that you would like to add to the Primary record, choose how you want it added. Click the drop down arrow by the update options for each name or event. All links to parents, spouse(s) and children remain when you merge records.

In previous versions of PAF Insight, you could see all the fields for vital information (birth, christening, death, burial) whether they contained data or not. FamilyInsight only shows a vital information field that contains data. You will not see empty fields. If you merge information from the Secondary record, the required fields will be added automatically as part of the merge process.

Differences between information in the Secondary and your Primary record are highlighted in pink. When information appears in the Secondary record and the corresponding field in the Primary record is empty, the data is highlighted in green. This information is added automatically if you Merge the records.

Make sure you select the information you want to have added to your Primary person when you

click Merge. Selecting the information that you want included when you merge records has changed somewhat from previous versions of Insight. Only information that is highlighted in pink is added by putting a check in the box. All other information that you want to merge into the Primary record (left) is selected from a drop down menu next to the name or event field. Your options are:

- **Merge** – Overwrites the information in the Primary record with the selected information from the Secondary record. You must select the information you want brought over.
- **Add as #1** – Adds the information on the right as the primary data for this event. Any information you had for the event will move to the **Other Events** section for your individual in your file.
- **Add as New** – Adds the information as new information under the **Other Events** section in your file.
- **Ignore** – Choose this if you do not want to update any information for this event.

For Marriage events: If there ia more than one marriage, choose the marriage on the right that you want to match with a marriage on the left. If there is more than one marriage, you will need to select the correct marriage from the Spouse dropdown on the right above the name of the visible spouse. If you choose "Spouse 2 James Allen Taylor", the marriage information for that marriage will be made visible.

Then choose whether you want the marriage information from the new **FamilySearch™** website added to your file. Then choose whether you want the marriage information from the Secondary record. From the drop down box underneath the marriage heading, choose from the following:

- **Match with Spouse # Name** – This option is only available if the left side spouse is the same record number or RIN as in the right side record. This merges the Secondary information with the MRIN # on the left when you merge your records.
- **Add** – Adds the marriage as a new marriage for the individual when you merge your records.
- **Ignore** – If you choose this option, no marriage information will be added to your file when you merge your records.

Next, decide how you want to transfer the actual marriage event data and/or the sealing information. Information highlighted in pink may be selected by putting a check in the box but you must still use the drop down box in front of the date and place fields, to choose from the following options:

- **Merge** – Merges any checked information from the right side with the information you have in your record on the left. You must check the information you want brought over into your primary record.
- **Add as #1** – Adds the information on the right as the primary data for this event. Any information you had for the event will move to the **Other Events** section for the marriage.
- **Add as New** – Keeps your original information as the primary information and adds the new information under the **Other Events** section in your file for this marriage.
- **Ignore** – Choose this if you do not want to update any information for this marriage.

For Parent information, first decide whether you want the parent's information from the Secondary record to your file. You must select the parents as you did for the spouses if there is more than one set of parents for this indiviudal in your file. The choices are:

- **Match with Parents # and Names** – This merges the checked information with the information in your record for the corresponding family number.
- **Add** – Adds the individuals listed as a new set of parents.
- **Ignore** – Choose this if you do not want to add or update any information for parents.

When you select the information that you want in your file, either click on the **Merge** icon or choose **Merge** from the **Action** menu.

The updated information will appear in the individual's record, on the left. If you want to make other changes, you can edit the information while in FamilyInsight.

If an individual in your database has parents or a spouse in the Secondary record that you do not have in your Primary record, and you choose to add them, new records will be created for these individuals in your file.

Carefully review each setting before you merge.

The merged information will appear in the Primary individual's record on the left. If you want to make other changes, you can edit the information while in FamilyInsight.

Sources and Notes

- There are two ways to transfer source information when you merge people.
  - Set your preferences by clicking **Edit** and choosing **Preferences**. *__Macintosh Users__ – Choose the FamilyInsight menu option, then choose **Preferences*** Click the **General** tab and put a check in the box by "**When selecting an event, select its source too**". **NOTE:** If you do not select an event for inclusion in the merge, any source information associated with that event will be lost unless you use the following option.
  - "**Add when Updating**" in the source citation window. You can view and edit a source by clicking on the source icon, next to the event, in the Primary record.
- When sources contain differences, the source icon will be highlighted in pink.
- If there are differences in the notes, the **Show Notes** button will be highlighted in pink and the **Notes Selection Box** will become active. You can view the text of the notes by clicking on the **Show Notes** button and the differences in text will be highlighted in pink.
- From the Notes Selection Box you can choose to:
  - **Replace** – The notes on the left will be replaced with the notes on the right when merging.
  - **Combine** – This will combine the notes from both records. If there are common notes in both records they will not be duplicated; only the differences highlighted in pink will be combined.
  - **Ignore** – This will ignore the notes on the right and not change anything in the notes on the left.
  - You may also choose to edit the notes on the left directly in the notes field.
  - If there are only notes on one side, those notes will be kept by default. If there are notes on both sides, then Combine will be selected. If there are common notes in both records only the differences highlighted in pink will be added from the right to the left record.
- The modified notes will not be permanent until you save your work.
- When change your records, "(modified)" appears by your file name in the Title bar. This disappears when you save your changes.
- When the information that you desire is selected, click on the **Merge** icon, Control+M, or select Merge from the Actions menu. This will merge the information in the Secondary record, on the right, into the Primary record, on the left.
- This information is not saved in your database until you either click on **Save**, go to **File**, on the

menu bar, and choose **Save** or **Save As**, or click **Yes** from the popup window when exiting.

Marking Records – Not A Match and Research

The **Merge** mode offers two choices for marking paired individuals, **Not A Match** and **Research**. Use **Not A Match** when the people are not duplicates. Use **Research** when you are unsure whether they are duplicates or not.

- People marked as **Not A Match** will no longer show up on the possible duplicates list unless you change the filter to **Show All Not a Match**.
- People marked with **Research** will appear on the list unless you change the filer to **Hide Research**.
- If there are records that you would like to research further, you can add a research note by clicking on the **Research** icon or selecting **Research** from the Actions menu. A note similar to: "**RESEARCH–FOR–MERGE: This individual might be the same as Hans /Hansen/, RIN 2178**". will be added to your records.
- Individuals you mark for **Not A Match** or **Research**, will be noted in the status column of the Individual Names list.
- Your changes are not permanent until you save your work.
    - You can save to the original file by clicking the **Save** icon.
    - To save the changes with a new file name, click the **File** menu and choose **Save As**. The **Save As** window will appear so you can rename your file and Save.
- If you forget and try to exit without saving, you will get a warning. You can then choose **Yes** to save to your original file name, **No** to exit without saving the changes, or **Cancel** to return to the Merge mode.

Absorbed Status Notation

If you have a person entered more than two times in your file, they appear on the list of possible merges in several combinations.

EXAMPLE:
A and B
B and C
A and C

As you merge records, you may get the notation **Absorbed** in the status column. Absorbed indicates one of the individuals, in this combination of possible matches, has been merged into another individual and you no longer need to merge this pair. You should proceed to the next possible combination. When **Absorbed** appears in the status, the **Merge** button is deactivated.

In the following example, three individuals are paired as possible matches in three different combinations. When you merge people A and B, person B is essentially "deleted" from your file. It is no longer necessary to examine the pair of B and C because B is combined with A. You still need to compare A and C and merge them if they are the same person.

EXAMPLE:
A and ~~B~~ – Merged. Person A contains all the information from both A and B
~~B~~ and C – Absorbed because B was merged into A and no longer exists in your file
A and C – Ready for examination to see if they should be merged.

Quick Guide

Although we provide these brief instructions, you may also get step–by–step guidance, by clicking the **Guide Me** button in the **Toolbar**.

- Open FamilyInsight into the Merge mode.
- Select a pair of people that are matched as possible duplicates.
- Compare the records in the **Details** window at the bottom of the screen.
- Select the information from the Secondary person that you want to retain when you merge the records.
- Click the **Merge** button.
- If the selected pair of individuals are not the same person, mark them as **Not A Match**.
- If you cannot tell whether a pair of individuals are the same person, mark them for **Research.**.
- The changes you make are not final until you click Save. We recommend that you save your work frequently by clicking on the **Save** icon.