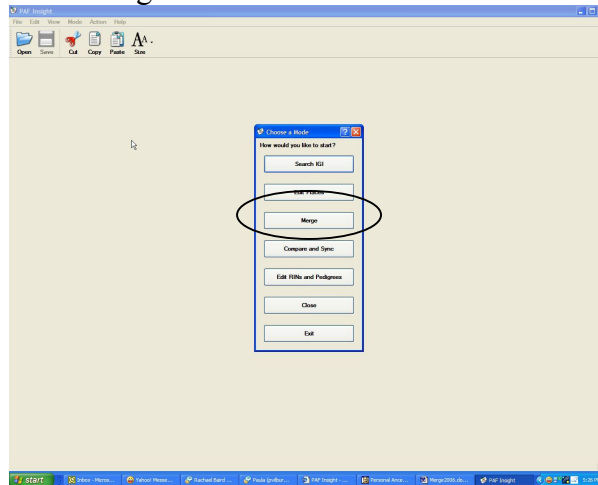


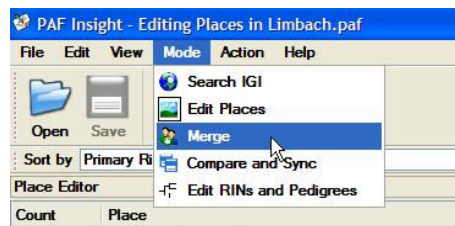
Merging Duplicate Individuals using PAF Insight

Begin by opening your PAF database or backup (.zip) into PAF Insight either from the Tools menu in PAF or directly into PAF Insight.

Choose "Merge" from the "Choose a Mode" window.

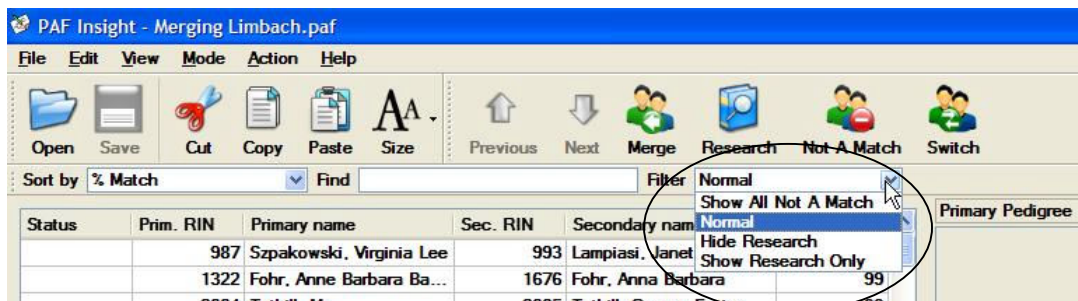


If you already have your PAF file open in PAF Insight go to the Mode menu on the Menu bar and choose "Merge"



Your database will open in **Merge**.

The **Individual List** opens in **Normal** view. There are four choices you can choose to view.



Normal --- Shows all the individuals that are possible matches. It also shows records that you have previously marked for Research

- **Show all Not a Match**---Shows all the records shown in the Normal view plus records you have previously marked as Not a Match
- **Hide Research**---Shows only those matches that have not been marked for research.
- **Show Research Only**---Gives a list of all those you have marked for research.

The Individual List will show the individuals that are possible candidates to merge. The **Details View** of the **Individual List** is shown when the program opens. Information for each individual can be viewed in the Details view when they are highlighted in the Individual list. Any differences are highlighted in pink. When information appears in the secondary file and the corresponding field in the primary file is empty, the data will be highlighted in green.

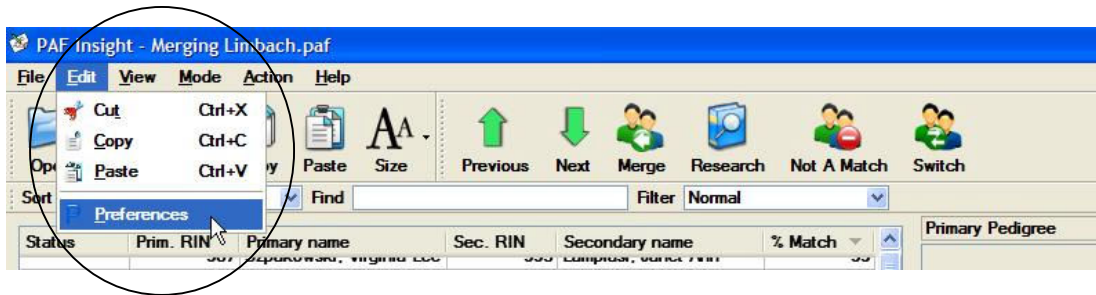
The screenshot displays the PAF Insight software interface. The main window shows an Individual List with columns for Status, Prim. RIN, Primary name, Sec. RIN, Secondary name, and % Match. The list is sorted by % Match. A row for John /Blanchard/ is highlighted, and its details are shown in the Details View. The Details View compares the Primary Individual (RIN 2315) and the Duplicate Individual (RIN 2317). The Primary Individual has a birth date of 1770 and a death date of 1850. The Duplicate Individual has a birth date of 1768/1770 and a death date of 1850. The death date of the duplicate is highlighted in green, indicating a difference from the primary individual's death date. The Details View also shows parents and children information for both individuals.

Status	Prim. RIN	Primary name	Sec. RIN	Secondary name	% Match
	1322	Fohr, Anne Barbara, Bar...	1676	Fohr, Anna Barbara	99
	2884	Tuthill, Mr	2005	Tuthill, George Foster	99
	2007	Tuthill, Temperance or...	2016	Tuthill, Experience	99
	2040	Tuthill, Phineas	2348	Tuthill, Sylvanus	99
	2085	Hine, Eva	2090	Hine, Emma	99
	926	Chase, Emma L	2120	. Emma	99
	2242	Hine, Mildred	2243	Hine, Adeline	99
	2315	Blanchard, John	2317	Blanchard, John	99
	2331	. Mary	2359	Wickham, Mary	99
	2391	Horton, Mehitable	2441	Bradley, Mehitable	99
	2419	Tuthill, Mary	2420	Tuthill, May	99
	2405	Wells, William	2437	Wells, Wm	99
	2408	Youngs, Mary Maria	2438	. Mary	99
	2408	Youngs, Mary Maria	2439	. Unknown	99
	2567	Stone, John Enos	2571	Stone, John Eno	99
	2566	Stone, Lydia	2588	Stone, Asa or Asey	99
	2602	Jordon or Jourdon, Lydia	2606	Jordon or Jourdon, Eliz...	99
	1499	Jaquot, Agnes	1500	Jaquot, Anne Marie	86
	1126	Ley, Alfred Fabian	1128	Ley, Wilfred Sebastian...	62
	1476	Ducret, Louis	1477	Ducret, Louis	54
	1038	Read, Mr	1039	Thompson, Mr	52

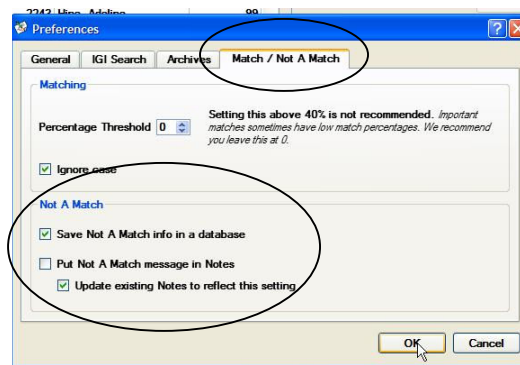
When the program opens, individuals are listed according to the % match column in order of their match probability. The % match column is on the far right of the Individual List.

You can change the list order by clicking on one of the column headings at the top of the Individual List or by changing the "Sort by" selection using the dropdown list. This will arrange the records by Status, Primary RIN, Primary Surname or Primary Given Name, Secondary RIN, Secondary Surname or Secondary Primary Name, or % Match.

Go to Edit on the Menu bar and choose **Preferences**.



This will take you to the Preferences window.

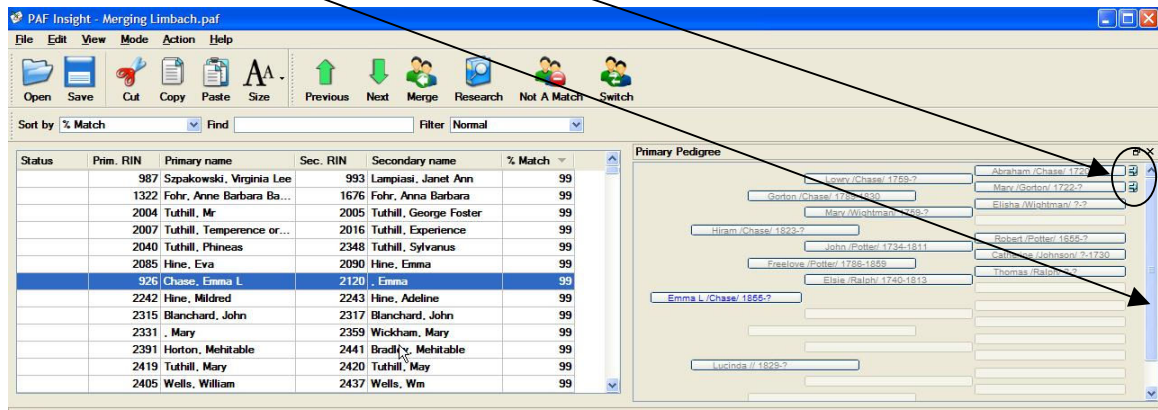


Select Match/Not a Match and choose whether you want your **Not A Match** notations to appear in your notes and whether you want a hidden Not a Match Database. If at any time you want to change where or how you store your "Not a Match" information, you can make the change here. You can also select your matching preferences for the matching threshold as well as whether to ignore case when matching.

To **MERGE**

- Select a pair of individuals to merge. You can move through the Individual List using the **Next** and **Previous** icons, the up and down arrow keys on your keyboard, Next or Previous in the Actions menu, or by clicking on an individual.
- 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.

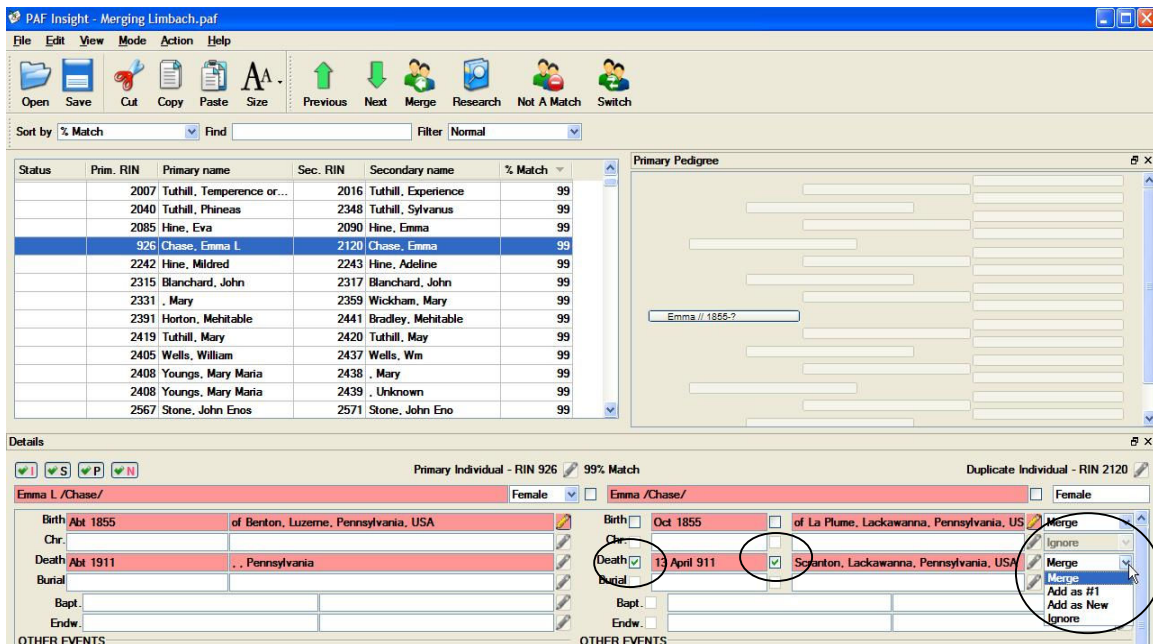
- You can also compare how they fit in the pedigree by choosing to show the pedigrees from the View menu. You can move around in a pedigree using the pedigree Scroll Bar and arrows.



- You may switch the primary record, on the left, with the secondary record, on the right, by clicking the **Switch** icon, using the Shortcut keys of Control + W, or selecting Switch from the Actions menu.



- Make sure that the information you want to merge is checked.** If there is information in the right hand record that is missing in the left hand record, this information is checked by default. You may uncheck this information if desired and check other information you would like merged.
- When you find the information you would like merged into the primary record, choose the appropriate information selection type from the list next to the event.



For Individual life events you can choose from

- **Merge**--this will merge any checked information with the information that is in the primary record. You must check the information you want brought over.
- **Add as #1 (or other number)** -- This will add the information on the right as the primary data for this event. Any information you had for the event will move to "Other Events" on your Edit Individual screen in PAF.
- **Add as New** -- Will add the information as new information under "Other Events" in PAF.
- **Ignore** -- Choose this if you do not want to update any information for this event.

For Marriage events you first choose how you wish to transfer the data on the right into your records on the left. From the drop down box on the first line of the marriage information section, choose from the following:



- **Add as Marriage RIN#**--If the information in the right is the same or very similar to the information on the left, you may get this option. This merges the information on the right with the same MRIN # on the left when you Merge your records.
- **Add** -- This 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, you need to decide how you want to transfer the actual marriage event data on the right with the event data on the left. You may have the same marriage date in both the primary and secondary files but the places may be different. By clicking on the drop down box to the right of the date and place fields, you can choose from the following options:



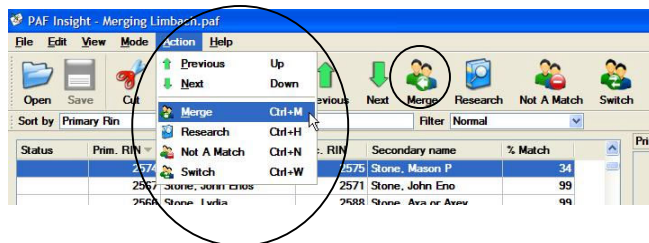
- **Merge** - This will merge any checked information from the right side with the information you have in your record on the left. You must check the information you want brought over into your primary record.

- **Add as #1 (or other number)** - This will add the information on the right as the primary data for this event. Any information you had for the event will move to "Other Events" for the marriage.
- **Add as New** - This keeps your original information as the primary information and adds the new information under "Other Events" in your file for this marriage.
- **Ignore** - Choose this if you do not want to update any information for this marriage.

For Parent information choose how and if you want information merged in your file.



- Merge with **Parents Marriage RIN #** -- this will merge the family information from the right side individual with the family information of the individual on the left for the corresponding family number.
 - **Add** -- When the records are merged, the checked parents on the right will be added as a new set of parents for the individual on the left.
 - **Ignore** -- Choose this if you do not want to add or update any information for parents.
- When you have selected the information you want updated, you can merge that information into your file by clicking on the Merge icon or choosing Merge from the Action menu or using the shortcut key Control+M.



- The information that you have merged can now be seen in the left hand record in the details view. If there are any changes you would like to make you can edit the information in your record while in PAF Insight.

Sources and Notes

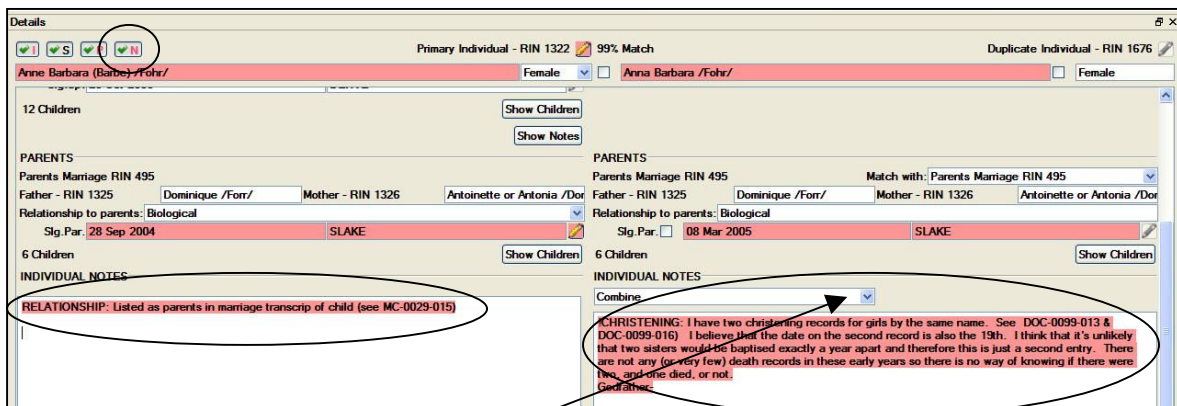
- When you update information from the secondary record into an individual in your primary record, sources are added to the event(s) that were merged according to the preferences you have selected. Other sources are also added if you checked "Add when Updating" in the source citation window. You can view

and edit a source by clicking on the source icon, next to the event, in the Primary record.



Source Icon showing differences

- 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:

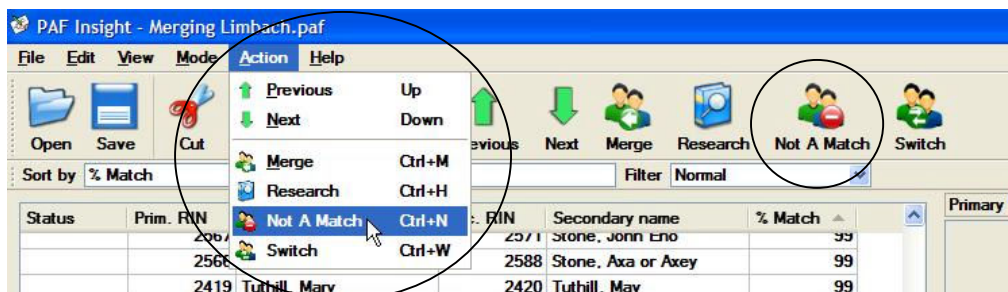
- **Replace** – The notes on the left will be replaced with the notes on the right when merging.
- **Combine** – This will combine the notes from both records. If there are common notes in both records they will not be duplicated; only the differences highlighted in pink will be combined.
- **Ignore** – 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 database. When you have modified your file, "Modified" will be shown in the lower right corner.
- When the information that you desire is selected, click on the **Merge** icon or 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 popun window when exiting.

Not A Match and Research

- If there are records that you are sure are not a match you can add a notation to them by clicking on the **Not a Match** icon or selecting Not a Match from the Actions menu.



- If you have set your preferences to "Put Not A Match in Notes", a note similar to "NOT-A-MATCH: This individual is not the same as Hans /Hansen/ 1791-?, PAF ID {aa95eb56-37c9-11d5-9b14-0050baad6715}" will be added to your PAF record under Notes.
- If you have set your preferences to "Save Not A Match info in a database", it will be stored there.
- With a notation in either the notes or in the Not a Match database, they will not be matched by PAF Insight again. Only using the Not A Match database will render it of no affect if you look at the same records on a different computer.
- 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.



Research Icon

- Individuals that have a note added for Research, or have been marked as Not A Match or Merged, will be listed as such in the status column.

A screenshot of a database table with 6 columns. The first column contains status labels: 'Merged', 'Research', and 'Not A Match'. The second and fourth columns contain ID numbers. The third and fifth columns contain names. The sixth column contains a number, likely a count. The 'Research' row is highlighted in blue. A black circle is drawn around the 'Research' cell in the first column.

	2007	Tuthill, Temperence or...	2016	Tuthill, Experience	99
Merged	2004	Tuthill, Mr	2005	Tuthill, George Foster	99
Research	1322	Fohr, Anne Barbara Ba...	1676	Fohr, Anna Barbara	99
Not A Match	987	Szpakowski, Virginia Lee	993	Lampiasi, Janet Ann	
	926	Chase, Emma L	2120	Chase, Emma	99

- When you are finished merging, you need to save your database to finalize the changes. You can either Save to the original file or Save As to a new file name. To do this go to the File menu and choose Save or Save As. If you choose Save As, the Save As Window will appear and you can name 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 and choose Save As from the File Menu.