

## Name Merge Utility

The Name Merge utility (SA/UT/SU/NM) replaces the alphakey associated with one record with the alphakey of another, and in some cases merges data. You would run this utility if you have duplicate name records (alphakeys) for the same individual or business in WESPaC.

For example, you have two name records with alphakeys of CAMPBELL000 and CAMPBELL001 and they are the same individual. You would like to keep the name record associate with CAMPBELL000, but CAMPBELL001 is used in different tables in the system. If you delete CAMPBELL001 from the name table, you lose all the data in which CAMPBELL001 is attached. To avoid losing such data, you can merge CAMPBELL001 into CAMPBELL000 and the utility replaces the CAMPBELL001 alphakey with the CAMPBELL000 alphakey throughout the system.

The utility only allows each name record to be used once during each run of the utility. If you have three name records that need to be merged into a fourth name record, you would have to run the utility three separate times. It is recommended that the Name Merge utility is run when users are out of the system. Depending on how many records you are trying to merge, the utility may take awhile to process.

When you run the Name Merge Utility, you select a name to **Merge-From** (the name record you want to delete) and a name to **Merge-Into** (the name record you want to keep).

The system will allow you to use an alphakey associated with any Name Type in the **Merge-From** field. However, if you attempt to run the utility with an alphakey that has one of the name types listed below, the utility will not run properly and the **Merge-From** record will not be removed except in the case of Employee. Therefore, Student Membership Services requests that you do not use an alphakey with any of the following name types in the **Merge-From**:

- Student
- Fee Management Customer
- Fee Management Payor
- Food Service Customer
- Food Service Payor
- Security User
- \* Employee – When the **Merge-From** record has the Employee name type important information is lost. The user is warned that you may lose important demographic information on the employee side if you continue with the merge. The user is also warned that Master Profile User Defined Data is not merged. This information must be manually transferred. An Employee name type is used in combined databases.

An alphakey with any Name Type can be used in the **Merge-Into** field.

When the Name Merge utility is run, the following fields on the **Merge-Into** record are never overwritten even if the fields on the **Merge-From** record are blank:

- Name (all fields associated with it including the Alphakey)
- Address (all fields associated with it)
- Extended Address Information button (all fields associated with it)
- Phone Numbers (all numbers and information associated with them)
- Gender
- Marital Status
- Birthdate
- From the More button (all fields associated with it)
- Business / Individual type (applies to vendor names)
- Social Security Number field

Additional items to consider and be aware of when running the Name Merge utility include:

- User Names and Passwords: Any time **Merge-From** has an associated username and password this information is overwritten by the username and password values on the **Merge-Into** record. This is true for *all* usernames and passwords associated with the **Merge-From** record including:
  - Access to all Web Applications
    - Family Access
    - Student Access
    - Educator Access Plus
    - Employee Access
  - WESPaC

The username and password information for the Merge-Into record would need to be communicated to the user.

- #Save parameters in the system associated with the **Merge-From** record are not updated with the **Merge-Into** alphakey. If the **Merge-From** user selected **Allow Use by Other Users** on the #Save parameters these saved parameters will be available after the Name Merge utility has been run if a user selects the **All Users** option under **View Saved Parameters For:** on the parameter screen.
- Data Mining Reports are not updated with the **Merge-Into** alphakey. If Data Mining Reports are not reassigned to another user prior to running the Name Merge Utility the report parameters will be lost. These reports can be reassigned to another user through the **User Names – Delete/Reassign User Items** utility (SA/UT/SU/NI). This utility allows a user to delete or reassign various user items within the system. The utility searches for several HR/Fiscal reports as well as Data Mining report templates. The number of each item type found for a user is then displayed. These items can then be reassigned to another user or deleted from the system.

Example:

User Name	Name Key	Number of Items	Item Description
Campbell Ella	CAMPBELL001	23	Data Miner Template: Student

Scenario:

Martha Jones is a teacher in the district. She is in the system twice, once as JONESMAR000 an emergency contact and a staff member with security assigned. She is also in the system as JONESMAR001 an employee.

Question: Which record should be kept? How do these two records get merged with no or minimal lost data?

If JONESMAR001 is merged into JONESMAR000, then demographic information contained on the employee record that is not on the staff record will be lost. Additionally, there is a significant amount of information on the employee profile that is not merged and must be transferred manually.

JONESMAR000 should not be merged into another name because that alpha key is a security user and the utility does not merge Security.

Recommendation:

Retain the Employee record as it is the most complete record.

1. Confirm that JONESMAR001 is a security user, if not make JONESMAR001 a security user.
2. Clone the security to the namekey you intend to retain (clone from JONESMAR000 to JONESMAR001).
3. Remove all security groups for the **Merge-From** name record (JONESMAR000).
4. Delete JONESMAR000 from Security Users.

**Note:** If the user has entered student notes a message displays giving you the option to assign them to another user or delete them. If you choose to assign them to another user, a screen displays allowing you to select the user to whom these notes will be assigned.

If there are saved reports attached to the security user you are deleting, a message displays advising you to assign these reports to another user. To assign saved reports to another user, click No and run the Change Owner of Reports utility through the Saved Reports screen - Utilities (SM\ST\RE\VS). If you click Yes saved reports will be deleted.

5. Proceed with Name Merge. Enter JONESMAR000 in the **Merge-From** field and JONESMAR001 in the **Merge-Into** field.
6. Click Commit to add more records to be merged or click OK when you're finished adding records to be merged and you're ready to run the utility.

If the merge is successful, the JONESMAR000 name record will be deleted from the system.