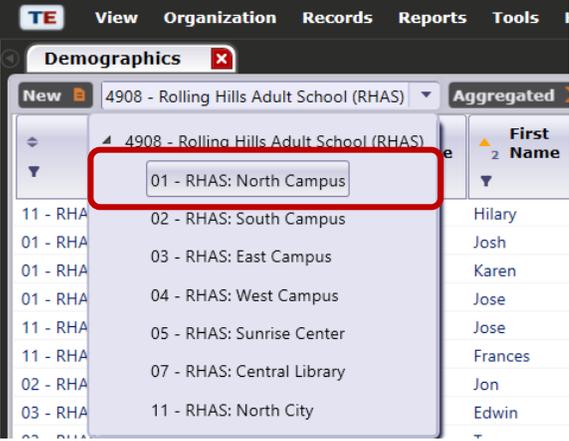
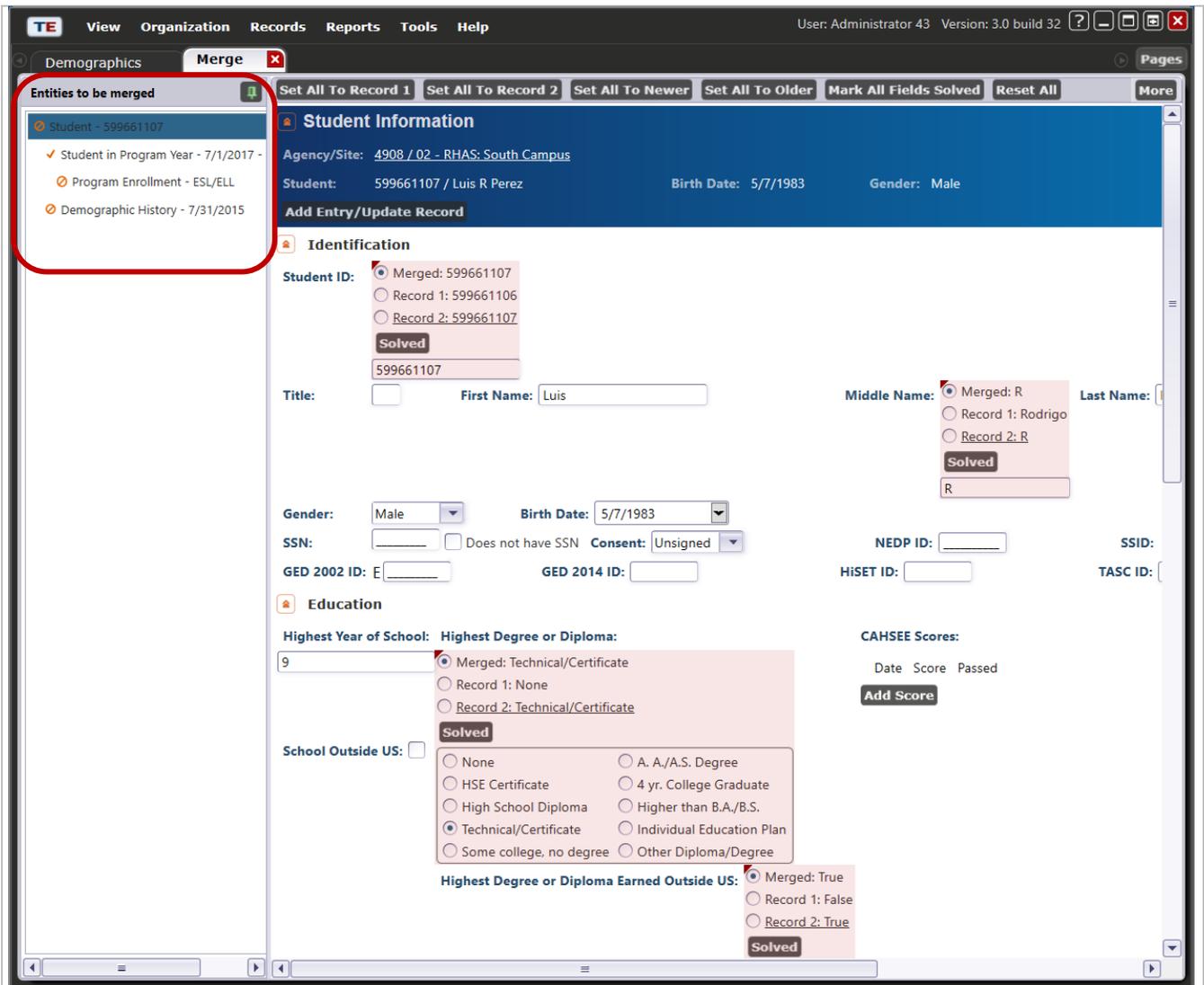


Steps to Merge Duplicate Student Records

Step	Screen	Description
1.		<ul style="list-style-type: none"> From the Menu bar at the top, <ul style="list-style-type: none"> Click Records. Select Students. <ul style="list-style-type: none"> Click Demographics. A tabbed page will open to the list of Demographics records for the current program year.
2.		<p>Because duplicate records must be at the same site to merge –</p> <ul style="list-style-type: none"> Click the Container field down-arrow and from the Toolbar at the top, <ul style="list-style-type: none"> Select a Site. <p><i>Tip!</i> Run the Duplicate Students report to identify duplicate records at the same site.</p>
3.	 <ol style="list-style-type: none"> First, sort on Last Name. Second, sort on First Name. Third, sort on Middle Name. <p><i>Note!</i> Adding Gender and DOB columns helps identify duplicate records of the same student.</p>	<ul style="list-style-type: none"> Suggestion: Configure and presort columns: <ol style="list-style-type: none"> Click the UP arrow in the Last Name column header. Click and hold the Shift key on your keyboard, and then click the UP arrow in the First Name column header. Click and hold the Shift key again, and click the UP arrow in the Middle Name column header. Release the Shift key.

Step	Screen	Description
4.		<ul style="list-style-type: none"> For duplicate records, <ol style="list-style-type: none"> Click to highlight the First record. Use the Ctrl + click key command to select a Second record.
5.		<ul style="list-style-type: none"> With two duplicate records highlighted, <ul style="list-style-type: none"> Click the More button at the top right. Select Miscellaneous. Click Merge. <p><i>Note!</i> The Merge button is only available <i>after</i> selecting duplicate records.</p>
6.	<p>SEE IMAGE ON NEXT PAGE</p> <ul style="list-style-type: none"> The Merge Wizard opens in a new tab with a split screen <ul style="list-style-type: none"> On the right is the list of Entities to be merged. <ul style="list-style-type: none"> Identifies records with conflicting data fields. On the left, it shows combined Demographics for the selected duplicate records. <ul style="list-style-type: none"> Data fields highlighted in pink identify conflicting information that must be solved. <p><i>Note!</i></p> <ul style="list-style-type: none"> Conflicting data fields in <i>all</i> Entities to be merged must be solved before you can begin the merge process. 	



The **Toolbar** at the top of the **Merge Wizard** offers shortcut options to merge the two selected records.

- | | |
|-------------------------------|---|
| Set All To Record 1 | ➤ Automatically uses all of the information from the first record to create the merged record. |
| Set All To Record 2 | ➤ Automatically uses the data from the second record. |
| Set All To Newer | ➤ Automatically selects the data from the most recent record. |
| Set All To Older | ➤ Selects data from the earliest record. |
| Mark All Fields Solved | ➤ Merges the two records based on the default. |
| Reset All | ➤ Cancels your selections and re-highlights all of the conflicting fields so that you can address these issues again. |

Step	Screen	Description
7.		<ul style="list-style-type: none"> For Student ID, <ul style="list-style-type: none"> Select the correct ID. Click Solved. <p><i>Note!</i> The Student ID field now displays the solved information.</p>
8.		<ul style="list-style-type: none"> The recommendation for solving Middle Name fields is to <ul style="list-style-type: none"> Select the <u>full Middle Name</u> for unique identifying information about a student. Click Solved.
9.		<ul style="list-style-type: none"> For data fields where no previous information exists (i.e., None), <ul style="list-style-type: none"> Select the added information. Click Solved.
10.		<ul style="list-style-type: none"> A Check will display after solving an Entity area. Continue solving all data fields with conflicting information in each Entity area listed as you work your way down the Entity Tree.

Step	Screen	Description
11.		<p>From the Toolbar at the top right,</p> <ul style="list-style-type: none"> Use Reset All if you need to start over with solving conflicts in the current Entity. Use Cancel Merge if you are unsure about any conflicts in any Entities to be merged and need to investigate further before attempting the merge. Use Apply Merge after solving all conflicts in all Entities to be merged. <p>IMPORTANT! This operation cannot be undone!</p>
12.		
13.		<ul style="list-style-type: none"> The message (at left) will display when the Merge process is complete. <ul style="list-style-type: none"> Click OK.
14.		<ul style="list-style-type: none"> The Merge Wizard closes automatically and returns you to the Demographics lister. The newly merged record is highlighted in the list.