

Match and Merge Feature in Reunion

Duplication happens when you accidentally add a person who is already in your Reunion file or import a GEDCOM which results in duplicate records. Reunion's Match & Merge feature includes ways to identify and remove duplicate people in your family file. Here's a summary of the features with **my thoughts about which two parts can be most useful**.

Duplication of people – it happens – maybe you can prevent it.

1. **Cause – Accidental** – you add someone who is already in your family file.
 - a. **Prevent** – check sidebar; put in the name and if there, will likely show on the list.
 - b. **Prevent – use Duplicate Check** – turn this on in Preferences>General>Data entry (at the bottom of the list). Be sure it's checked. Open the gear and set the certainty (Exact, High, Medium, Low).
2. **Cause – importing a GEDCOM (Genealogical Data Communication)** – used for exchanging genealogical data between different genealogy software. A relative may send you a GEDCOM or you may download one from the internet.

Caution: If you've importing a GEDCOM, check it out before adding it to Reunion – There are step-by-step directions for importing GEDCOMs in the Help>Contents section of Reunion.

Suggestion: Create a brand-new Reunion file and import the GEDCOM into that. Then clean it up – remove the people that you know aren't related – your sister-in-law's mother's third husband's ancestors – and then import that new edited Reunion file rather than the original GEDCOM.

- a. **Solution** – drag people you want to exclude to clipboard, then use hammer at the bottom to delete.
- b. **Solution** – Delete permanently – Highlight name in clipboard then *File>delete*.

Duplication of people – it has happened – *merge* to combine the duplicates: two ways to accomplish this.

1. **Easy merge** – Drag someone from sidebar and drop onto a husband or wife button on the family view.
 - a. Choose *Merge* when asked – this opens the *Merge Person* window.
 - b. Compare the two columns to see if they seem to be the same; on the left is the original; on the right is the one to be combined. You can also use this when you *know* two people are the same, but dates are not exactly the same – ca 1880 vs Jan 1881.
 - c. Notice the check marks – those are the people that would be merged.
 - d. **Color Coding**
 - **Green text on the right** – a different record from the one on the left and can be merged.
 - **Gray text on the right** – no corresponding person on the left – or didn't fit in limits of comparison. If merge is clicked, that person will be *added* to the left section, not merged with anyone.
 - **Black text on the right** – the record is exactly the same as the person on the left. That person will *not change when merge is clicked*.
 - e. You can choose to merge or cancel.
 - f. What happens to conflicting or different information when two people are merged? Note 4 below.
3. **Full-feature Match & Merge** – use this when you've got many duplicates scattered through your family file. Back up before beginning Match and Merge.

Step one - Find matches

- a. Choose *File > Match & Merge People* – opens *Match People* window.
- b. 1st section: *Find matches for . . .* choose who you are looking for.
The people on the family view will be listed first.
If you choose *Marked* or *Everybody*, this will take a loooong time. You'll get lists of possible matches and you'll need to go through them one-by-one.
- c. 2nd section: *Compare with . . .*
with **everybody** in your family file, or only with **marked** people, or **unmarked** people.
- d. 3rd section: *What to check for in a match . . .* choose the criteria.
 - Unique ID Number
 - Names & Dates (*choose this one*)
 - User ID Number

Step two – Merging people

- a. Opens the possible matches, *Merge People* window.
 - b. Left – list of people for whom you want to find matches – highlight a name.
 - c. Right – list of possible matches for the highlighted person in left-hand list. Highlight different names on the right to see how they compare with the person on the left.
 - d. There's a certainty symbol next to each name – certainty can be changed at bottom of the window.
 - Certainty – three levels – use the button to filter the list.
 - High – names, birth, and death exact match.
 - Medium – may or may not match.
 - Low – most likely won't match.
 - e. Under the top lists there's a synopsis of people high-lighted – details, parents, spouses, children.
 - f. Check others in immediate family to see if they also match; merge them, too.
 - g. Comparing People in the Lists.
Double click anyone on either list to see record **behind** the Merge People window.
[Color Coding](#) – see above.
 - h. Buttons in the Merge People Window.
 - *Merge Checked Groups* – merge records for checked person(s) on right with person(s) on left.
 - *Merge All High Certainty Matches* – Merges all cases where two people with the same Unique ID number or exactly same name, birth and death dates.
 - *Certainty* – use to filter what you see in the lists based on certainty (see above).
 - *Save* – makes changes permanent.
 - *Exit* – leave without making any changes.
4. **What happens to records when you merge two people?**
- Only people who are checked will be merged.
 - Person – the name selected at the top of the list
 - Parents – parents of the “person”
 - Spouses – spouses of the “person”
 - Children – children of the “person” **and** the highlighted spouse.
 - Unique information from the fields of the people on the right is moved into the records for the people on the left. Additional fields are added if needed.
 - If there are two birth dates or death dates, the person will now have two birth or death events.
(Solution) After you have merged you can find people with multiple or duplicate fields – use **Advanced Find**: Look for Conditions>Attributes>#of Duplicated Fields > More than 0.
 - If there's a birth date and a birth place, they will be combined.
 - All combined sources will be linked to the merged person.
 - Links – Person on left will retain links; links for person on right will be transferred to person on left.

Names

- If the names are not the same, the one most recently changed will be used. Others will be inserted into a new note field called “Match and Merge” using the text “Other Last Name: [the conflicting name]” will be entered into the “Match & Merge” note field. (This didn't show up when tested in class. Later testing showed that I had 17 people with this field activated, but *none* were the ones tested! No clue how the 17 others got there!) Solution –note of the different name and later add it to merged person.
- When people with different first names are merged, the longer of the two names will be used as the resulting first name. And if one name is a substring of (or contained in) the new primary name, the substring name is discarded. Thus . . .
 - “John” will replace “J” because “J” is a substring of “John”
 - “Gregory” will replace “Greg” because “Greg” is a substring of “Gregory”
 - “Gregory” would **not** replace “Gregg” because “Gregg” is **not** a substring of “Gregory”
 - “Raymond” will replace “Ray”
 - “Anne” will replace “Ann”