

The Mergician User Guide

The Mergician globally merges duplicate records on The Raiser's Edge. It is simple to use and makes use the duplication criteria that have already been configured within The Raiser's Edge as well as additionally making use of the email field. Just as with the built in single constituent merge you can decide which areas you want to merge and whether or not to delete the secondary constituent record once the merge has been completed. You can also select clean up options to reduce manual work on the merged records after the merge is performed.

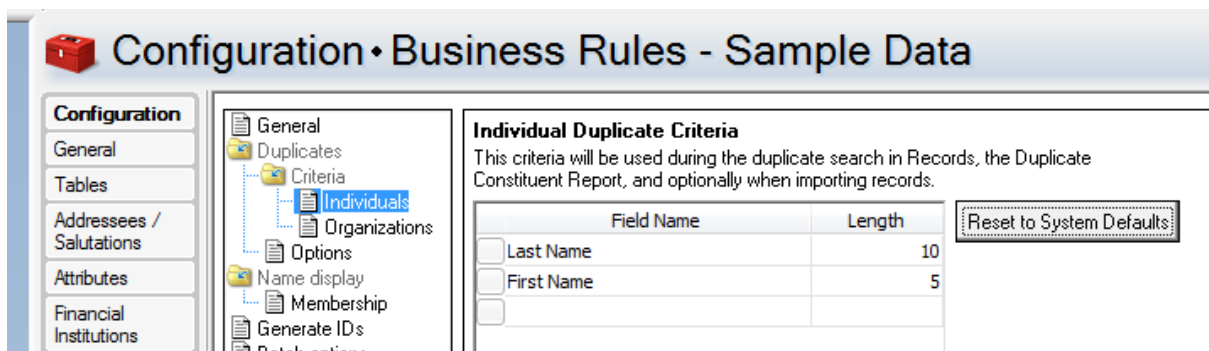
The Mergician – An Overview

Using The Mergician involves a few steps.

1. Set up your duplication setting in The Raiser's Edge
2. Run the duplicate constituent report in The Raiser's Edge
3. Create a global merge file.
4. Perform the merge

1. Set up your Duplication Settings

1. In The Raiser's Edge go to Config, Business Rules and select the Duplicates, Criteria, Individual branch as shown below:



Configuration • Business Rules - Sample Data

Configuration

- General
- Tables
- Addressees / Salutations
- Attributes
- Financial Institutions

General

- Duplicates
 - Criteria
 - Individuals**
 - Organizations
 - Options
 - Name display
 - Membership
 - Generate IDs
 - Batch options

Individual Duplicate Criteria

This criteria will be used during the duplicate search in Records, the Duplicate Constituent Report, and optionally when importing records.

Field Name	Length
<input type="checkbox"/> Last Name	10
<input type="checkbox"/> First Name	5
<input type="checkbox"/>	

2. Adjust the settings as required. You may want to add zip/postcode for a more stringent comparison.
3. Do the same for the organizations branch of the tree.

2. Run the Duplicate Constituent Report

1. In The Raiser's Edge go to Admin and select the Duplicate Constituent Report¹. The screen below is shown.

Duplicate Constituent Report

Show: Individual criteria Organization criteria

: (Duplicate individual criteria (from Configuration)

Field Name	Length
Last Name	10
First Name	5

Create output query of duplicate records

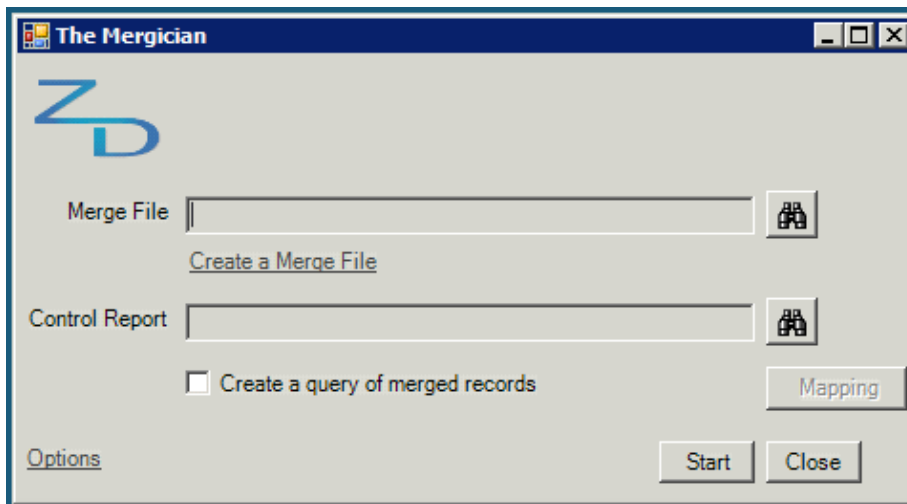
Run Report Now Cancel

2. After running the report you should sanity check the results to ensure that your duplicate criteria are sufficient or whether or not they are too stringent.
3. If you are happy with the majority of the results but find one or two are incorrect then note the constituent ids of these so that they can be removed from the merge file when it is created (see below) or for a more permanent solution add an attribute to those records so that they do not get merged.

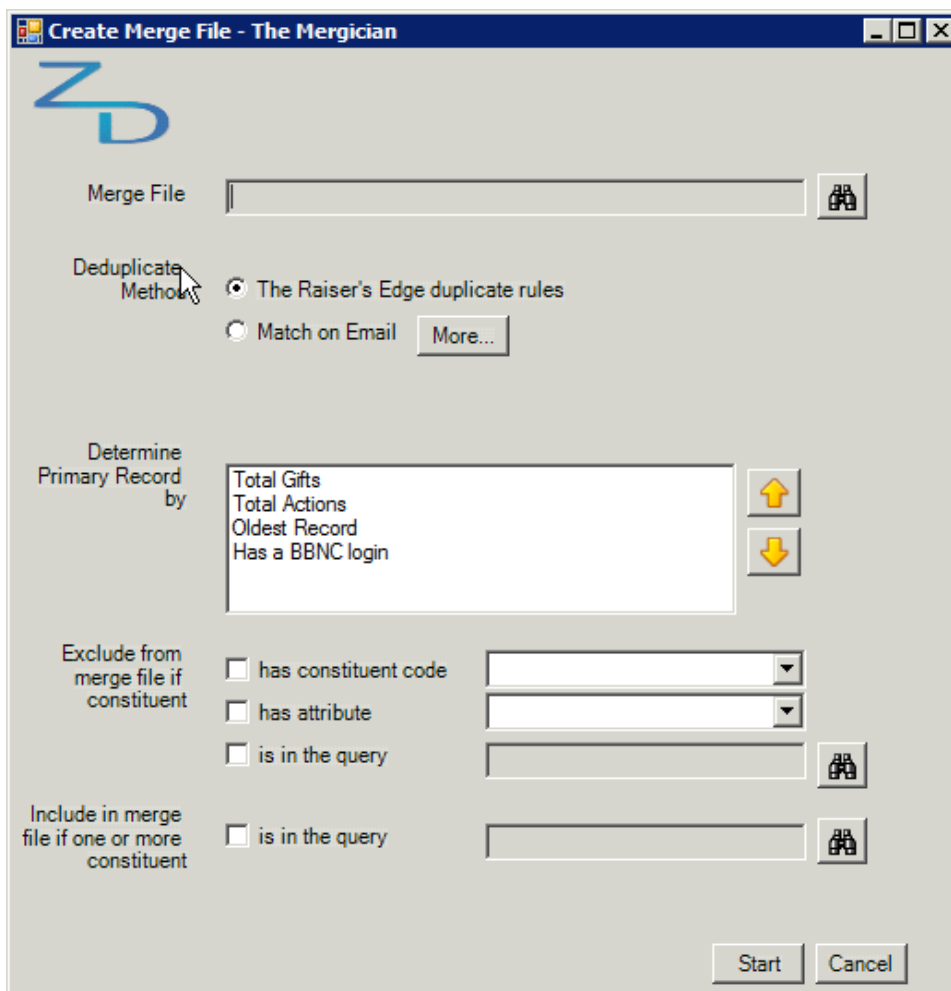
3. Create a Global Merge File

1. There are two ways of doing this, you can use the Raiser's Edge built in criteria, or The Mergician's email criteria.
2. The Mergician uses the same duplicate constituent report in order to create a merge file so any results appearing in your report will also appear in the merge file as long as The Raiser's Edge duplicate criteria does not change.
3. In The Raiser's Edge go to plug-ins and select The Mergician
4. You are first shown the main merge screen. If this is the first time you are running The Mergician and you do not have a merge file from another source, then you will need to create a merge file.

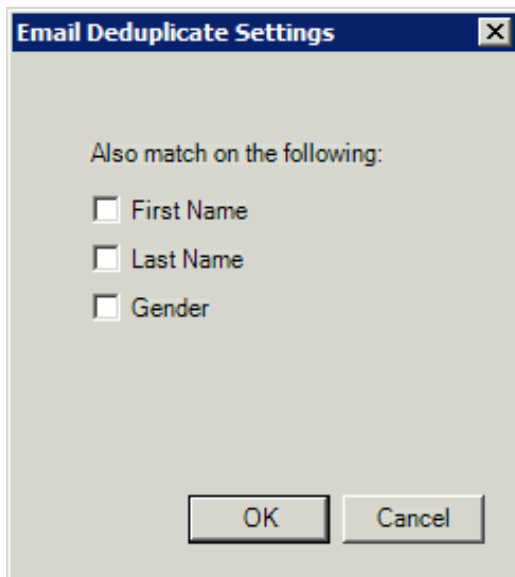
¹ The difference between the exclusion and inclusion criteria is subtle. An exclusion will remove a constituent from any merge operation independent of the other merge pair. An inclusion will include the given constituent *and* its merge pair.



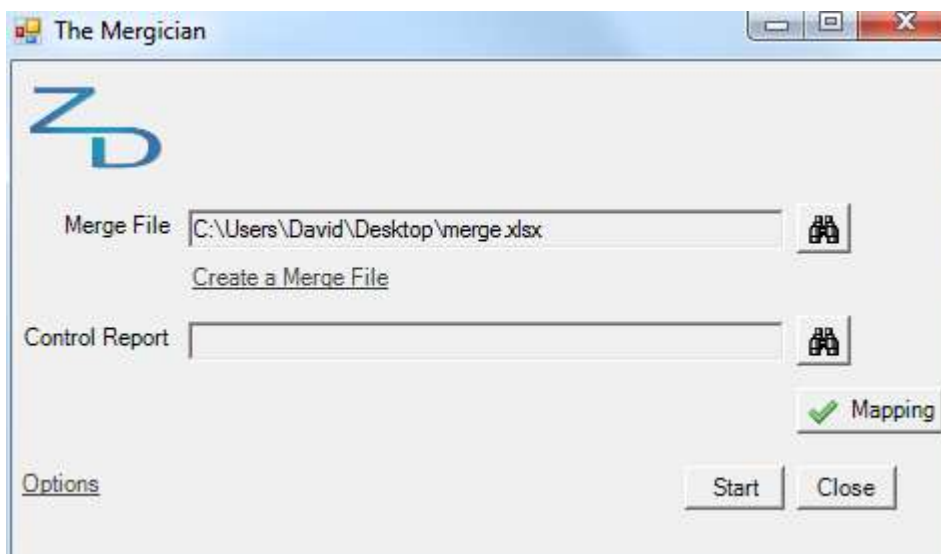
5. Click on the “Create a Merge File” link.



6. Select the where you want to save the created merge file.
7. Select the “deduplicate method” If you select “email” you can also click on the “more” button to select additional criteria, such as name.



8. Select how you want to determine the primary record. You can either select based on the number of gifts and actions and then date or just by the date. If the first option is selected, the process will first count the number of gifts on each matching record. If they are the same number it will proceed to count the number of actions. If they are the same it will determine the primary record by the oldest date created.
9. Select which constituents to exclude from the merge. You can select a constituent code, an attribute, whether the constituent is in a query or any combination of these.
10. Alternatively you can select a query that will include constituents. The merge file creation will run as usual. For each merge pair, if one of the constituents is in the query then the merge will be included in the file. If neither are in the query then the pair will not be included in the merge file.
11. Press the start button to create the merge file. The screen will close and the location of the merge file will be populated in the main merge screen as shown below.



12. The merge file that has been created has the default format so the mapping is automatic. If you supply your own merge file then you will have to map the primary and secondary constituent columns in the file.

4. Perform the merge

1. After creating your merge file (or supplying your own) you are ready to perform the merge.
2. Select the location of the control report. This will record any issues that The Mergician has with merging two constituents.
3. Click on the Options link to select options as shown below. These options are remembered between sessions so there is no need to perform this step each time.

Options - The Mergician

Merge | Clean Up 1 | Clean Up 2

Indicate which areas should be merged

<input checked="" type="checkbox"/> Biographical	<input checked="" type="checkbox"/> Actions	<input checked="" type="checkbox"/> Delete secondary record after merge?
<input checked="" type="checkbox"/> Spouse	<input checked="" type="checkbox"/> Media	<input type="checkbox"/> Add attribute to records to delete
<input checked="" type="checkbox"/> Contacts	<input checked="" type="checkbox"/> Attributes	<input type="text" value=""/>
<input checked="" type="checkbox"/> Solicitor	<input checked="" type="checkbox"/> Addressee/Salutation	<input type="text" value=""/>
<input checked="" type="checkbox"/> Education	<input checked="" type="checkbox"/> Honor/Memorial	<input checked="" type="checkbox"/> Add an alias to record the merged Id
<input checked="" type="checkbox"/> Relationships	<input checked="" type="checkbox"/> Volunteer Information	<input type="text" value="Maiden"/>
<input checked="" type="checkbox"/> Appeals	<input checked="" type="checkbox"/> Prospect Information	
<input checked="" type="checkbox"/> Notes	<input checked="" type="checkbox"/> Membership Information	
<input checked="" type="checkbox"/> Bank Information	<input checked="" type="checkbox"/> Event Information	
<input checked="" type="checkbox"/> Gifts	<input checked="" type="checkbox"/> Tax Declarations	
<input type="checkbox"/> Soft Credits		

OK Cancel

4. From the options select the areas that should be merged.
5. There is also the option to delete the secondary record after the merge. Alternatively you can add an attribute to the secondary record so that you know it should be deleted.
6. You can also select to add the constituent id of the secondary constituent to an alias of the primary constituent. This is useful if you want to keep a track of the Id of the merged constituent.
7. You can also choose your clean up options here which will run on the merged records after the merge is performed. Select from the “clean up” tabs at the top of the screen.

- Select duplicate areas that you would like to remove. You can drill down into areas you want to clean up e.g. from appeals you can also match on the package or the date

Options - The Mergician

Merge | Clean Up 1 | Clean Up 2

Constituent Code

Remove Duplicates

Start Date

End Date

Addresses

Remove Duplicates

Copy phones (where they do not create duplicate phone types)

Do not delete address where there are conflicting phone types

Appeals

Remove Duplicates

Duplicate if the following are matched (appeal is included):

Package Response
 Date Total Given

Attributes

Remove Duplicates

Duplicate if the following are matched (category is included):

Description Comment
 Date

OK Cancel

- You can also choose to clean up duplicate Relationships and Actions. Note that in this version of The Mergician relationship cleanup will only occur with constituent relationships where the constituent matches exactly and optionally the relationship and reciprocal types also match.

Options - The Mergician

Merge | Clean Up 1 | Clean Up 2

Relationships

Remove Duplicates

Duplicate if the following are matched:

Relationship Reciprocal

Actions

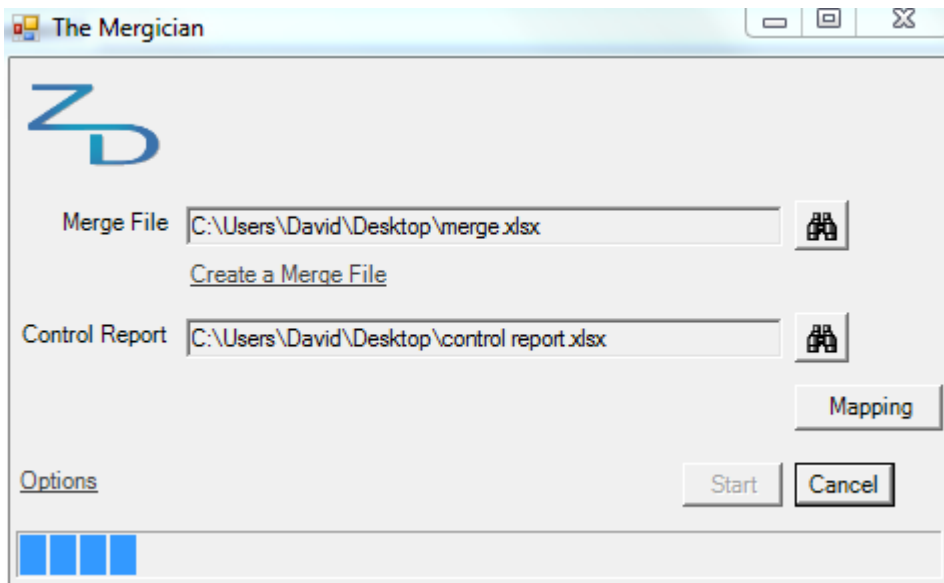
Remove Duplicates

Duplicate if the following are matched:

Category Type
 Date Status

OK Cancel

10. Once you have set the options and the clean-up criteria press OK to return to the main merge screen and press start to start the merge



11. The progress bar will indicate the records that have been merged. Note that this process may take a long time especially if you the number of records to be merged is large. The process will also take longer if you are deleting the secondary constituent following the merge and adding aliases to the primary constituent.
12. The control report shows if there were any errors that occurred during the merge. The types of errors encountered are the same as those encountered during a single merge using the standard Raiser's Edge merge function.