Match and Merge in Reunion
## Silicon Valley Computer Genealogy Group, July 2024

1. **Accidental Duplication of People**
   - Happens when you accidentally add a person who is already in your Reunion file or import a GEDCOM which results in duplicate records.

2. **Prevention – two ways**
   a. <u>Check sidebar</u>: open list view, see if there is already someone with the name. May be several with similar names, so could take a while to look at each.
   b. <u>Use Duplicate Check</u>
      - Turn this feature on in Settings>General>Data Entry and adjust the sensitivity settings.
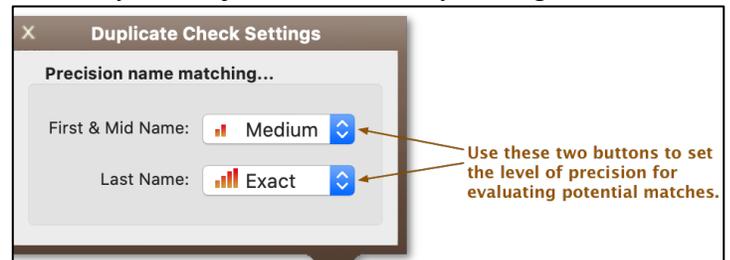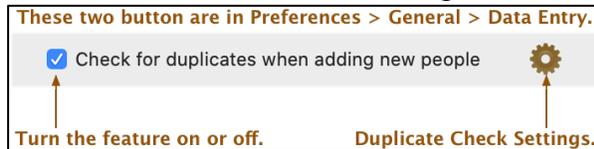
      - When you begin to add someone to a family (parent, spouse, child), the duplicate check window may pop up with names of people who are already in your file. This is based on a flourish span of the dates that would fit with the family. The duplicate check sensitivity settings gear is also available in the pop-up window.

3. **Planned Import of GEDCOM or Other Reunion File**
   - **GEDCOM** - stands for **Genealogical Data Communication**) for exchanging genealogical data between different genealogy software.
   - Reunion has good directions for importing a GEDCOM or another Reunion file.
   - *Back up your main Reunion file before starting.*
   - Suggestion: if you're importing a GEDCOM, check it out first– make a separate new Reunion file of the GEDCOM before importing it into your main file or import the new separate Reunion file.
   - Unmark everyone in your main file before importing a GEDCOM or different Reunion file (such as when you want to combine your mother's family (A) with your father's family(B)).
   - Mark everyone in the other file (GEDCOM or the other Reunion file (B)).
   - Use the **Automatic Source** button to show source of new items (create a new source, use one of your existing sources, or use an obvious source name: Cousin's GEDCOM or Mother's Family File).
   - Use the **Automatic Flag** feature to automatically mark the imported/combined records.
   - When searching for Match and Merge,
      - In the Find section, select Marked people.
      - In the Compare section, select Unmarked people.

4. **How to Merge People – two ways.**
   Once you have imported a GEDCOM, merged a family file, or entered a duplicate, there will be lots of duplicates. There are two Match & Merge Solutions (explained on the next pages):
   - <u>Easy Merge</u>
   - <u>Full Feature Match & Merge</u>.

5. **Easy Merge**: use this if there are a few duplicates (First you have to find the mistakes – use the sidebar)
   • Drag someone from sidebar and drop onto a husband or wife button on the family view.
   • Confirm when asked if you want to merge (or add as a spouse)
   • This goes to the *Merge Person* window.
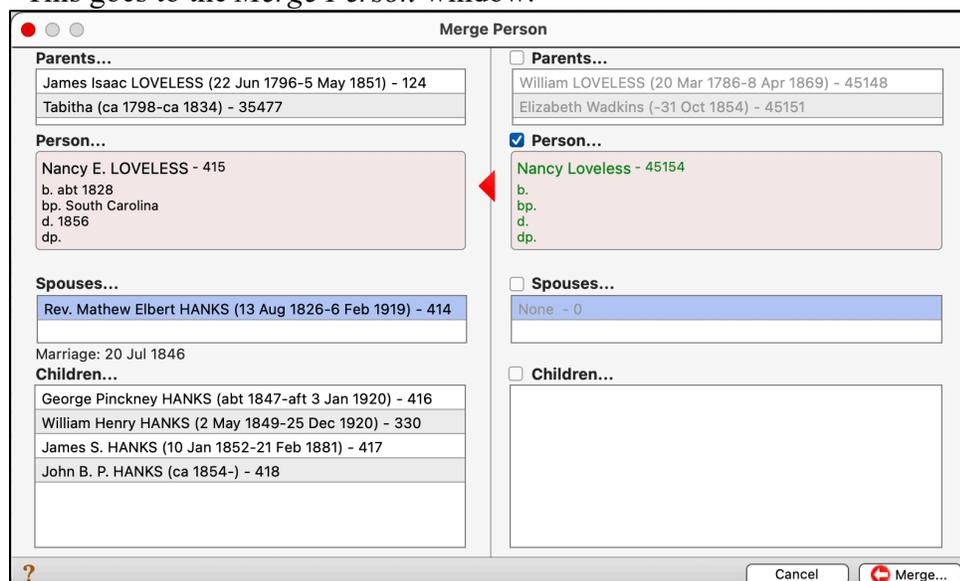
   • Compare the two columns. Notice the check marks – those are the ones that would be merged.
   • Choose *Merge* or *Cancel* at the bottom.
   • What happens to the conflicting or different information? **See item 7 below.**

6. **Full feature Match & Merge:** use this when you've got a bunch of duplicates scattered through your family file.
   • <u>Find matches</u> – step one

   Choose **File > Match & Merge People** – opens *Match People* window.

   1st section: *Find matches for . . .* choose who you are looking for (suggestion: use list window to find someone to compare).
   The people on the current family view will be listed first.
   Choosing marked or everyone will take a loooong time.

   2nd section: *Compare with . . .* choose who you want to compare with the first choice (compare with **marked** people, **unmarked** people or **everybody**).
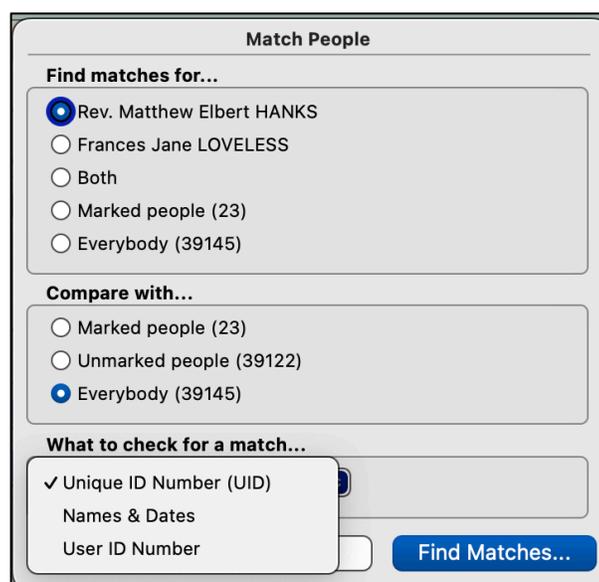
   3rd section: What to check for in a match . . . choose the criteria:
   Unique ID Number (assigned by GEDCOM).
   Names & Dates (I use this one).
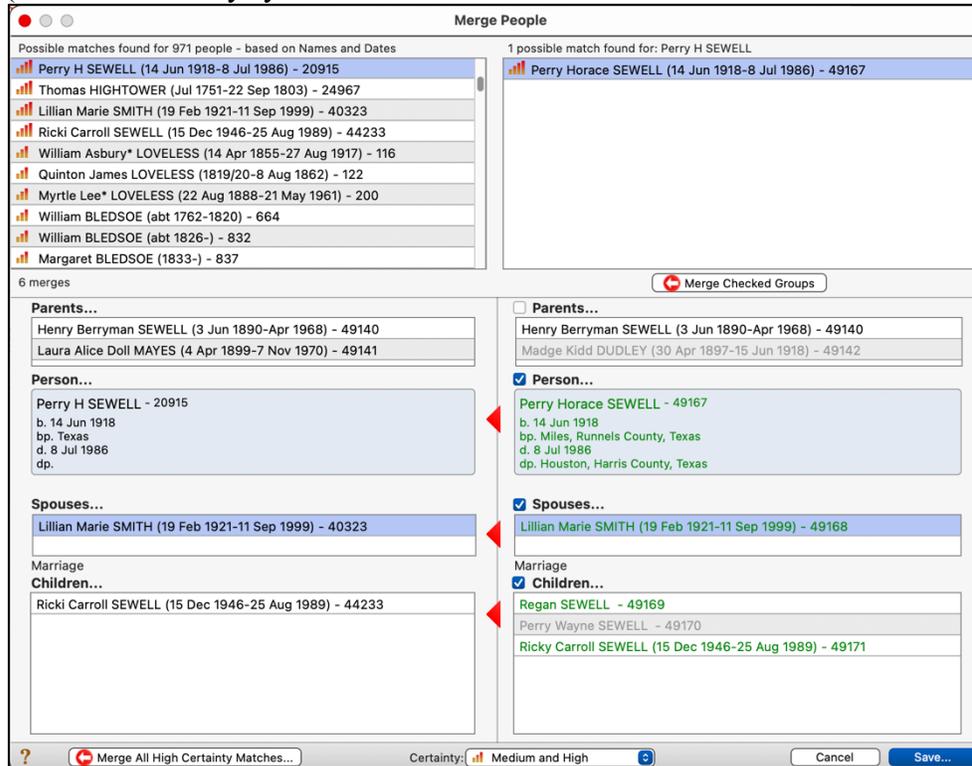   User ID Number (assigned by Reunion).
   Click *Find Matches* to go to Merging People

- Merging People – step two
  - Top left – list of possible matches. Top right – list of possible matches for person highlighted on left.
  - (Note the certainty symbol – based on number of bars beside name [Certainty: ▪ill High ▾])

  - Color Coding on the Right Side of Merge People Window:

> **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 – same ID number. Nothing will happen when merge is clicked.**

- Middle section, under the lists – synopsis of person high-lighted above.
  - Details, parents, spouses, children
  - Others in immediate family who also match, can be merged here (excepting "marked" situation)
- Comparing People in the Lists:
  - Double click anyone on either list to see that person's record **behind** the Merge People window.
- Buttons in the Merge People Window:
  - *Merge Checked Groups* (on the right, in the middle) – this button will merge the records for checked person(s) on right with person(s) on left.
  - *Merge All High Certainty Matches* (bottom left)– this button merges all cases where two people have the same name, birth and death dates.
  - *Certainty* (center bottom) – use this drop-down button to filter what you see in the lists based on three levels of certainty.
    - High – names, birth, and death exact match
    - Medium – may or may not match
    - Low – most likely do not match
  - *Save* – makes changes permanent.
  - *Cancel* – leave without making any changes.

Martha Wallace, July 2024

Children and Parents - People who have a parent/child relationship are automatically excluded from the lists of potential matches (you can't merge a parent with a child).

7. **What Happens to Records** – when merging checked groups.

    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, the person will now have two birth events.

        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 retains links; links for person on right will be transferred to person on left.

    Names: If 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 (or First) Name."

        When someone 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"

Suggestion: Revisit the merged people to investigate the combined people and information, especially in the new note field "Match & Merge."