# Family File Cleanup

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# What are we covering – Spring cleaning!

- Duplicate people – match & merge
- Match & Merge Sources
- Tips & tricks for finding issues

# How do we end up with mistakes?

- Adding people
  - Check the people bar to see if they already exist
- Importing GEDCOMs
  - From people you trust
  - Who did you include and who did they include?
- Typos
  - What year is it? 1816, 1916, 2016?
- Incorrect information entered
  - Does the information make sense?
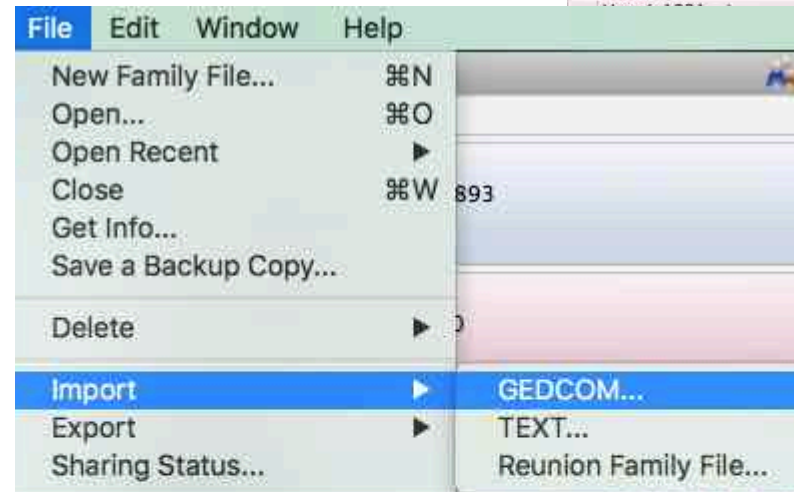
# Match & Merge

- ▶ Reunion's tool for merging duplicate people

- ▶ Need to be in family view

- ▶ Two types

  - ▶ Easy merge – just a few people to merge

  - ▶ Match & Merge function

    - ▶ Have a bunch of duplicate people scattered throughout the family file

- ▶ **DO NOT use this to carelessly import a bunch of GEDCOMs and expect Match & Merge will find all the duplicates**
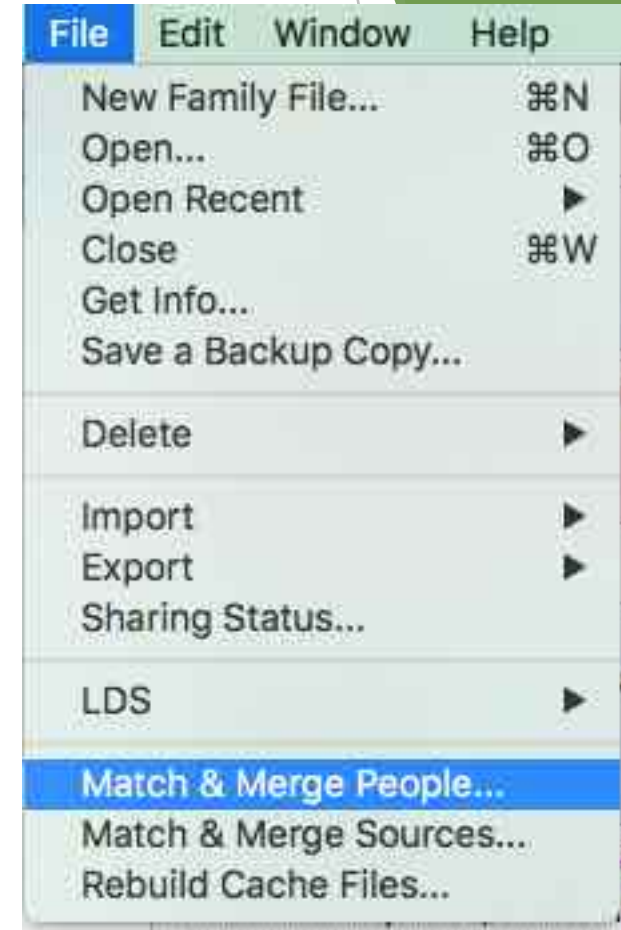
# Easy Merge

- Three steps

- 1 – Find person in people sidebar

- 2 – Select person with most complete information

  - Person will appear in the family view

  - This person is the keeper of existing and new info

- 3 – Drag duplicate people to person in family view

# Finding Matches

- Who to search on
  - Specific people from family view
  - Marked people
  - Everybody
- Who to compare to
  - Marked people
  - Unmarked people
  - Everybody
- WARNING: Comparing Everybody to Everybody can take time!
- Search time is exponentially related to the number of people selected
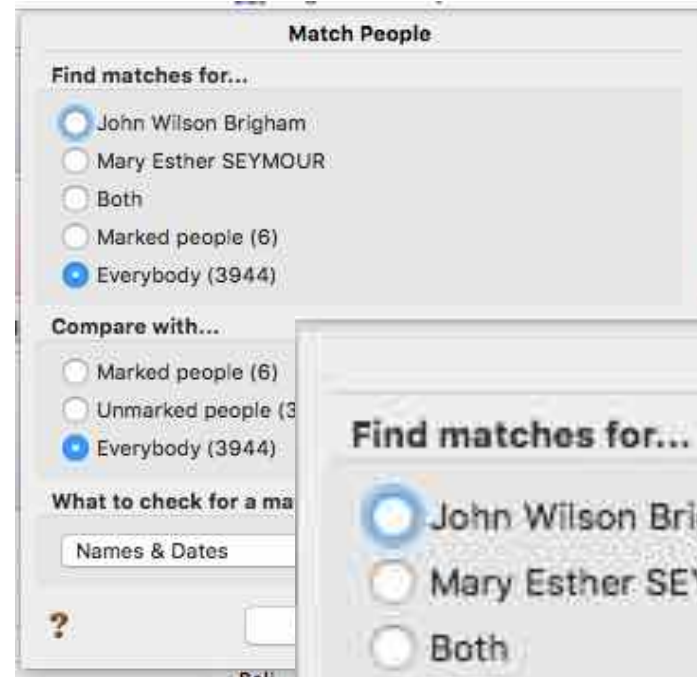
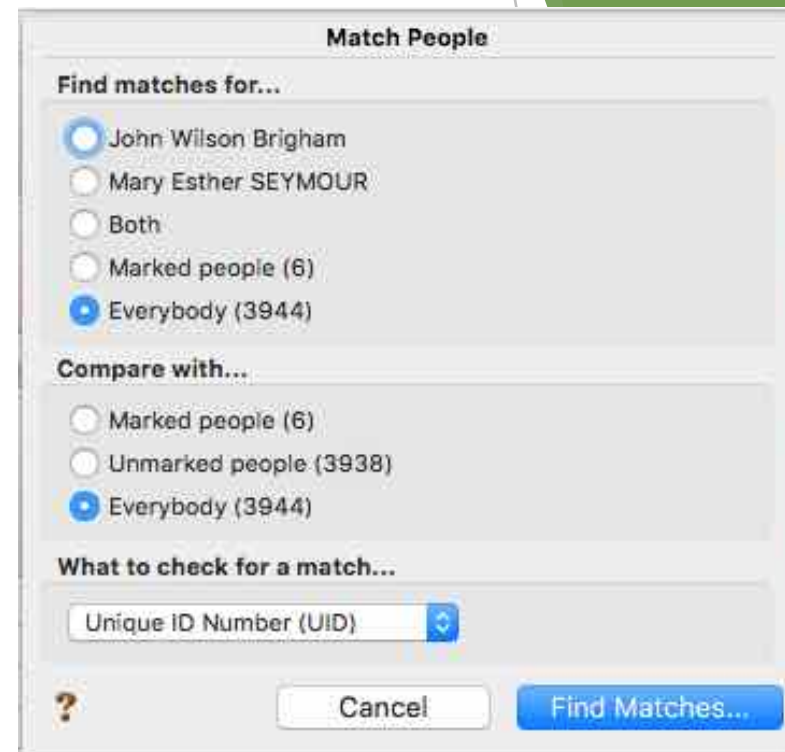# Finding matches

- What to search on
  - Names & Dates
    - Default
    - Most common
    - Allows Reunion to use "fuzzy logic" for comparison
    - Generational naming
  - Unique ID Number (UID)
    - Used when a previously exported information needs to be imported
  - User ID Number
    - User generated number for each person

# Making finding matches easier

- Importing a known GEDCOM

  - Export a branch from your family file

  - Provide to someone else to edit

  - Re-import after changes

  - Assumes import/export keeps Unique ID #

  - Use Unique ID # (UID) to find duplicates

**Match People**

Find matches for…

- John Wilson Brigham
- Mary Esther SEYMOUR
- Both
- Marked people (6)
- Everybody (3944)

Compare with…

- Marked people (6)
- Unmarked people (3938)
- Everybody (3944)

What to check for a match…

Unique ID Number (UID)

?    Cancel    Find Matches…

What to check for a match…

Unique ID Number (UID)

?    Cancel    Find Matches…

# Making finding matches easier

▶ Importing an unknown GEDCOM

  ▶ Unmark all people in existing family file

  ▶ Mark all people in GEDCOM being imported using Automatic flag/mark feature

# Making finding matches easier

▶ Importing an unknown GEDCOM

  ▶ Select find matches for marked people

  ▶ Compare with unmarked people

  ▶ Saves time for comparing people in new GEDCOM to existing people

# Making finding matches easier

▶ Importing one Reunion Family file into another

- ▶ Similar to importing a GEDCOM
- ▶ Unmark everyone in one family filte
- ▶ Mark everyone on the imported family file
- ▶ Compare marked to unmarked people
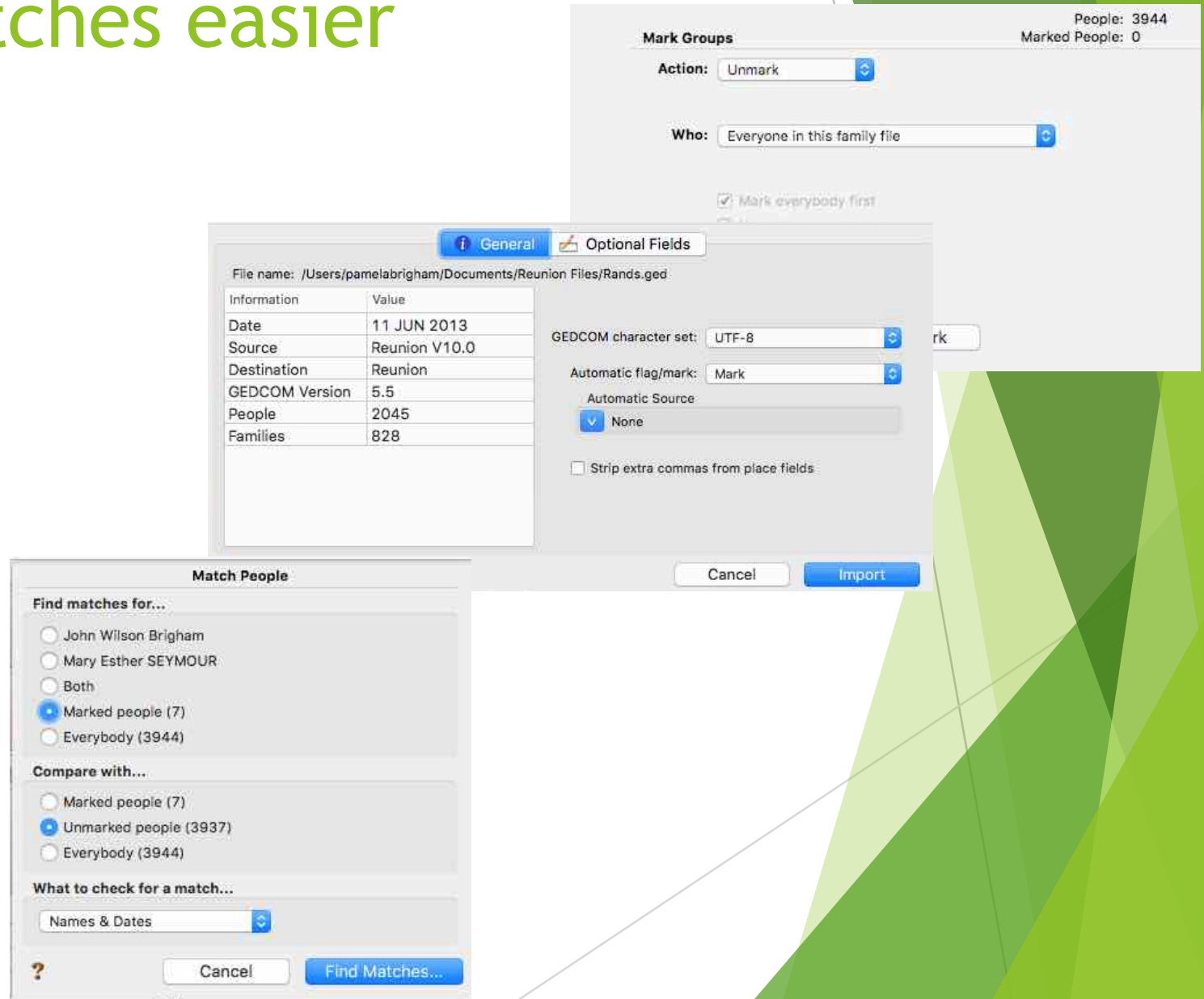
# Merging People



- **Upper left list**
  - Shows people who have possible duplicates

- **Upper right list**
  - Shows the matches for person selected from left list

# Merging people

- Synopsis of people in the window
  - Allows you to determine if the selected people are matches
  - Check parents & children
  - Check dates & places
- Merging parents, spouses, & children
  - Check/uncheck boxes to merge as needed
- Certainty
  - Reunion evaluates how close of a match it is
  - Can be used to filter a large number of matches

# Merging people

- Comparing people
  - Can double click on anyone to see them in family view for easier comparison
- Color coding
  - Green –
    - Person on right different from person on left
    - Person left is target person

# Merging People

- Color coding
  - Gray
    - Person on right no corresponding person on left
    - Will be added to the family view for the record on the left
  - Black
    - Person on right exactly the same as person on left
    - Same user ID

# Merge People

- Buttons in the merge window

  - Save - Nothing will happen **permanently** until you click the **Save** button. Clicking any of the other buttons doesn't change anything in your family file until you click **Save**.

  - Merge checked groups - To merge the records for the checked people on the right with the people in the left, click the **Merge Checked Groups** button.

  - Merge all high certainty matches - A "high certainty" match is defined as two people with the same Unique ID Number or two people with exactly the same name, birth date, and death date. If Reunion finds any high certainty matches, clicking this button will merge them all.

  - Cancel - To exit the Merge People window altogether, without making any changes, click the **Cancel** button.
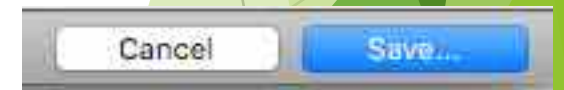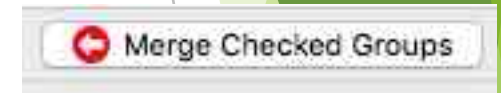
# What happens in the merge?

- Right merges with left

- Information from right is transferred to left

- Person on the right is deleted

- Links to parents, children, spouses move to person on the left

- Names – most recent changed date takes priority

- Names – any other names create a new note "Match & Merge"

- Finding duplicate fields – under conditions->attributes

# Match & Merge Fuzzy Logic

- Add people that shouldn't be added during the merge

- Not add people you want added

- Might need to use easy merge way on some people first to get better results in Match & Merge

- Might end up with duplicate spouses that will need to be fixed

# Match & Merge Sources

- ▶ When importing GEDCOMs review sources for duplicates

- ▶ 3 ways to Match & Merge sources

- ▶ Easy way – drag & drop sources onto each other
  - ▶ Confirmation window appears
  - ▶ **This cannot be undone**

- ▶ Second way
  - ▶ Right click (Control-Click) on the source
  - ▶ Select Merge source into another source
  - ▶ Enter source number
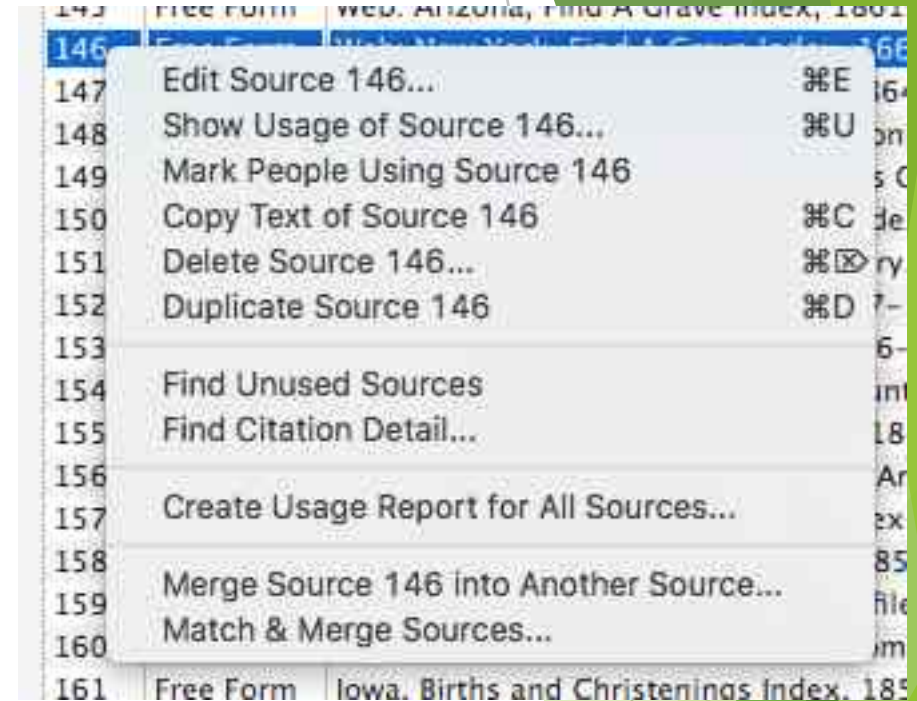
# Match & Merge sources

- ▶ Third way – Match & Merge Sources

- ▶ Select this from file menu

- ▶ Must be in family view

- ▶ Find matches based on characters & source types

- ▶ Top is what matches were found for

- ▶ Bottom are found matches

- ▶ Double click on a match to review it more

**Match Sources**

Criteria for a match...

The first `25` ⌄ characters must match.

☑ Source types must match

? Cancel Match...

**Merge Sources**

Possible matches were found for... No merges

| # | ^ Type | Data | |
|---|--------|------|---|
| 14 | Periodical | Perry Historians, Perry Review, 2003, 24, 2003 | |
| 30 | Interview | Marriage Certificate, 25 Dec 1873, Perry Historians, Perry historians | |
| 69 | Free Form | Christina McLaughlin, 7 Apr 2008, Internet: panda6@embarqmail.com | |

▤ Next  ⬆ Merge  ⬆ Undo

Possible matches for: 14

| # | ^ Type | Data | |
|---|--------|------|---|
| 51 | Periodical | Perry Historians, The Airy View, Various, Various | |
| 52 | Periodical | Perry Historians, Perry Review, 27, 2006 | |
| 53 | Free Form | Perry Historians family files. | |

Double-click to view a source.

? ⬆ Merge All    Cancel    Save...

# Match & Merge sources (cont.)

▶ Merge – will merge the bottom source with the top

▶ Any additional data from bottom source added to the top

▶ Citations links are moved from the bottom source to the top source

▶ Nothing is updated until you click save

▶ You can undo a merge before you save if you accidently merge sources

▶ Merge all – only if you are very sure that all sources are duplicates

**Merge Sources**

Possible matches were found for...                                    No merges

| # | ^ Type | Data | |
|---|--------|------|---|
| 14 | Periodical | Perry Historians, Perry Review, 2003, 24, 2003 | |
| 30 | Interview | Marriage Certificate, 25 Dec 1873, Perry Historians, Perry historians | |
| 69 | Free Form | Christina McLaughlin, 7 Apr 2008, Internet: panda6@embarqmail.com | |

▤ Next       🔴 Merge       🔙 Undo

Possible matches for:    14

| # | ^ Type | Data | |
|---|--------|------|---|
| 51 | Periodical | Perry Historians, The Airy View, Various, Various | |
| 52 | Periodical | Perry Historians, Perry Review, 27, 2006 | |
| 53 | Free Form | Perry Historians family files. | |

Double-click to view a source.

? 🔴 Merge All       Cancel       Save...

# Tips & Tricks - Feasibility

- Found under lists
- Can be checked when you enter dates
- Setup date checking under preferences
- Good to run after importing data (GEDCOM or Family File)
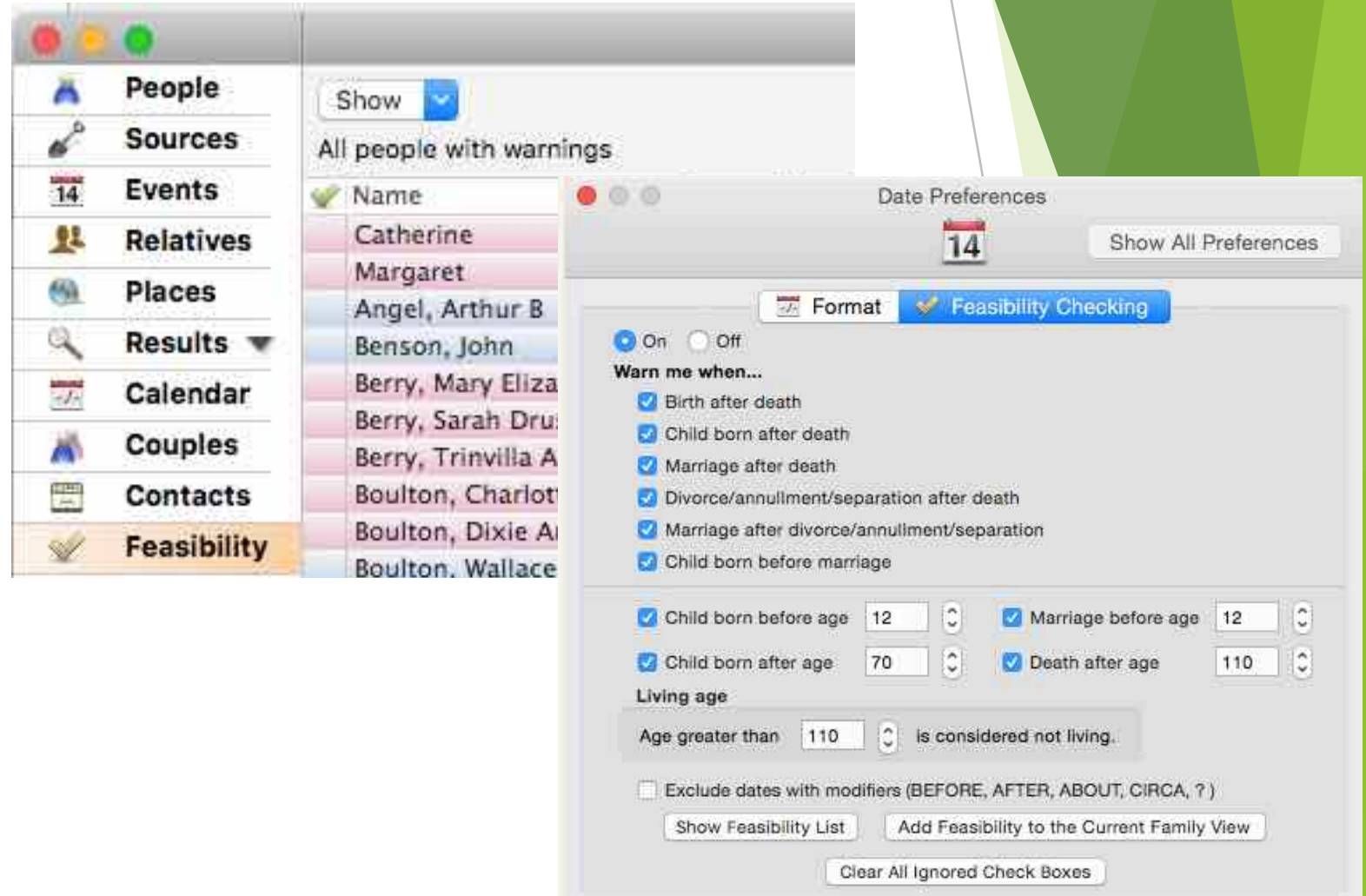
# Tips & Tricks – Reports & Find

- Statistics – should provide similar results as feasibility
  - Show Age – at first/last child
  - Show Age – at first marriage
- Multimedia files
  - Show missing files
- Find -> Unlinked people
  - No children, parents or spouse
  - Will show up as an island also

# Tips & Tricks - Islands

- ▶ Groups of people linked to each other, but not linked to people in other islands

- ▶ Separate fragments of a family tree

- ▶ Can get created when importing GEDCOMS

- ▶ Can be used for researched, but not properly linked family tree branches

# Questions?