

Match Merge and Other Ways to Clean Up Your PAF File or Other Database

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I Things to Clean Up

A. Things the computer will help you locate using *Reports and Charts*:

1. *Unlinked individuals*
 - Link them
 - Keep them
 - Export/Delete them
2. *Possible Duplicate Individuals*
 - Another way to check for individuals that need to be merged.
 - Click *Options* button, and *Advanced* for ways to control the search.
3. *Possible Problems List* - Use options
 - Children born before marriage
 - Spouses far apart in age (+ 15 years)
 - Wife too young to be the mother of the child (16-45 is the range)
 - Surname and spouse's surname are the same
 - Children born after death of mother
 - Children are not in the correct order by date in marriage.
4. *End-of-line Individuals*
 - Are they really?
 - Is there more research you can do?
 - Do you need to estimate and submit? (Last resort only! Please.)
5. *Places Sorted Alphabetically* helps you locate:
 - Inconsistencies in listing jurisdictions, such as Bavaria vs. Bayern
 - Punctuation problems - are all commas between place levels
 - Spelling errors
6. *Individuals with Notes* - Does everyone have notes?
7. *Source List*
 - Does Citation look as you intended?
 - Are their duplicates?
8. *Citations References a Source*
 - Shows source
 - List of people who have that citation linked to them.
 - Are their persons linked to a wrong source? Town A vs. Town B
9. *LDS Incomplete Individual Ordinances* - Can also locate with Focus Filter
10. *LDS Incomplete Marriage Sealings* - Can also be done through Focus Filter
11. *LDS Family Ordinance Summary*
 - Missing info? Missing Ordinances
 - Only way to see entire family and their ordinance info. on one page in PAF

B. Tool Menu features that will help you clean up:

1. *Match/Merge*
2. *Merge Duplicate sources and citations*
 - If you click on this option it just starts right up.
 - You may wish to see #7 above.
3. *Global Search and Replace* -
 - a. Cautions
 - Make a back up **BEFORE** you start.
 - There is no "preview" feature. (You could use Focus Filter)
 - Once you fill in boxes and click *Replace*, process happens.
 - b. Search and replace text in places, dates, full name, notes, temple codes.

- c. Wise to use the “*Create a report of records changed*” feature.
- 4. **Change Names to Mixed Case** - Standardize the look.
- 5. **Gregorian Date Calculator** - Use this to clean up dates if necessary.
- 6. **Preferences** - Go through the preferences and see if changing any of the default settings will be of benefit. Especially use *General*, *Names* and *Format* tabs
 - Example: Scandinavian or Hispanic Names - Click on *Names* tab and uncheck *Use Father’s Surname when adding a child*

C. Edit Menu features that will help you clean up:

1. **Order Spouses** - allows rearrangement.
2. **Order Children** - allows rearrangement.
3. **Edit Source List** and **Edit Repository List** features allow access to lists and editing with out being in the record of a specific individual. Changing the information will cause it to show up corrected with all the ind. linked to a source.

D. Things only a Human Eyeball can locate:

1. **Research notes** left in name, place and date fields.
2. **Names out of place alphabetically**
 - Indicates the Forward Slashes around the surname done incorrectly.
 - These will show up in the wrong place in an alphabetical *Search*.
3. **Punctuation issues in place names**
4. **Cultural situations** - surname of the child is different from that of the parent.

II. Fixing Errors -

A. General Cautions - Avoid making it worse while you are trying to make it better!

1. **Always make a back up** before doing anything major or “undoable.”
2. **Make another back up!**
3. **One Step at a Time** -Do things one step at a time.
4. **Do not be in a rush.**
5. **Try to be free of distractions.** [Lock the door, turn off the phone]
6. **Characteristics of computer databases/indexes** - Remember that anything not meant to be there can cause trouble, even an extra space.

B. Your Toolkit:

1. **Reports and Charts** to locate errors and inconsistencies
 - a. Cautions -
 - Use *Preview* and experiment with the options
 - Repeat until satisfied with the results.
 - b. Print all or part of list.
 - Use *print to file* option to save list without creating paper.
 - or
 - Print to paper.
2. **Tool Menu**
 - a. General Cautions -
 - No “preview” option on these functions
 - Do a back up and be prepared to use it
 - or Experiment on a copy of your database.
 - b. When using Global Search and Replace
 1. Safeguards
 - Use the option to *Create a Report of Records Changed*

- Create a focus list first
2. Fix
- Names
 - Places
 - Dates
- 3. Edit Menu and Editing**
- a. Delete marriage first and individuals involved secondly.
 - b. Whatever screen you are on, only the possible edits you can do will be in bold print and useable.
- 4. Your Eyeballs** - Go to the search Icon on the toolbar.
- a. Do an Alpha search through your database.
 - Look at the beginning of the list for names with a space in front, or those with no surname.
 - b. In an Alpha or RIN sequence search
 - Look for anything out of place.
 - Eliminate improper titles, occupation words, research note, etc.
 - Please no "Child, baby, infant, son, daughter,
 - No Sr., or other "non birth" titles. Jr. or II is proper.

IV. MATCH MERGE: I have the same person in my database more than once. Now what?

A. Where is *Match Merge* located?

- Locate *Match Merge* in the Tools menu.
 - On the Icon Toolbar click on the "three heads" picture.
- 1. You will be asked if you would like to make a **back up**. Good idea!
 - 2. You will be presented with a list of *Options*
 - a. What you want it to match on - regular menu
 - Names - exact spelling
 - Names - sound alike
 - Ancestral file numbers
 - b. What you want it to match on - Advanced menu
 - Year span = age range
 - Individuals with no surname
 - Individuals with no birthdate
 - Consider AFN
 - Consider middle names
 - Consider parents
 - c. How you want the merge to work
 - Combine notes
 - Combine sources
 - Combining media
 - Confirm when **Merge** button is pressed – Good idea

B. Getting Ready to Merge Individuals

- 1. **Two sided screen** - Locate the two people to merge

- a. Locate the two people by using the find buttons
- b. You can find by RIN number, search the Individual List or Descendency List
- c. It is easiest to have the family view screen up and have one of the two people in the main position before starting the Match Merge process.
- d. Then locate the second person by RIN or Search.

2. Deciding- Use the three tabs to view all info

- a. Individual Information - Comparison of main dates and places
- b. Marriage Information - Compare marriage dates, locations
- c. Family Information - Compare parent's names and children

C. Merging

1. Have the person with RIN you will keep on left side of screen.
2. Use Switch button if needed.
3. Use check boxes to indicate information to save in the merged version.

E. Features:

1. Edit -You can edit a person or their notes at any point by pressing Edit button.
2. Options button at bottom of box allows you to change your settings.
3. Next match - Previous
 - a. These features allow you to run a check on your own database.
 - b. Keep selecting next until you wish to stop. Then close.