Job Aid: Merge User Records

Purpose

The purpose of the Merge User Records job aid is to guide you through the step-by-step process of merging user records.

In this Job Aid, you will learn how to:

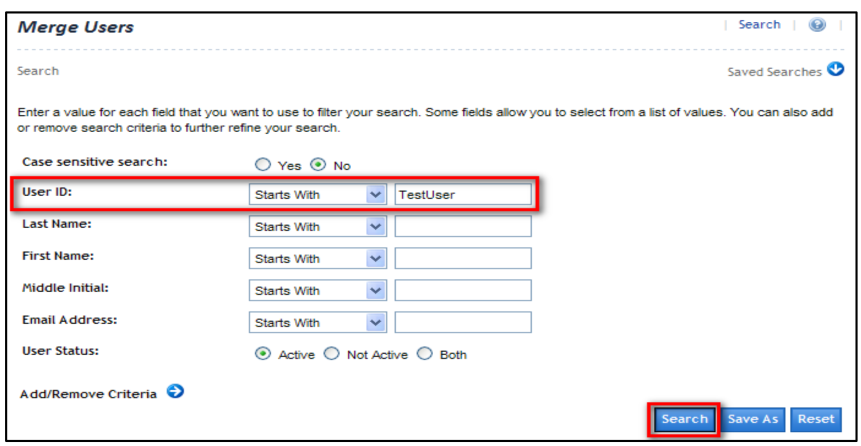
- Merge an Old User Record into a New One

Task A. Merge an Old User Record into a New One

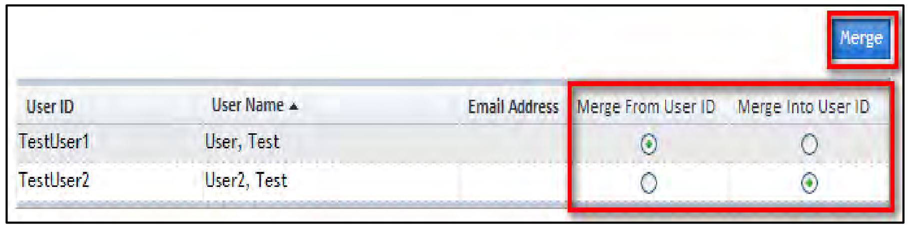
Note: Verify that the **Admin** tab is selected.

1. Navigate to **Users > Tools > Merge Users**.

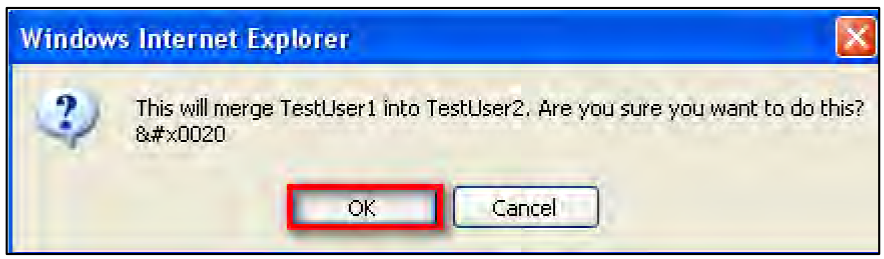
2. Search for a user by entering criteria for one or more fields
3. Click **Search**.



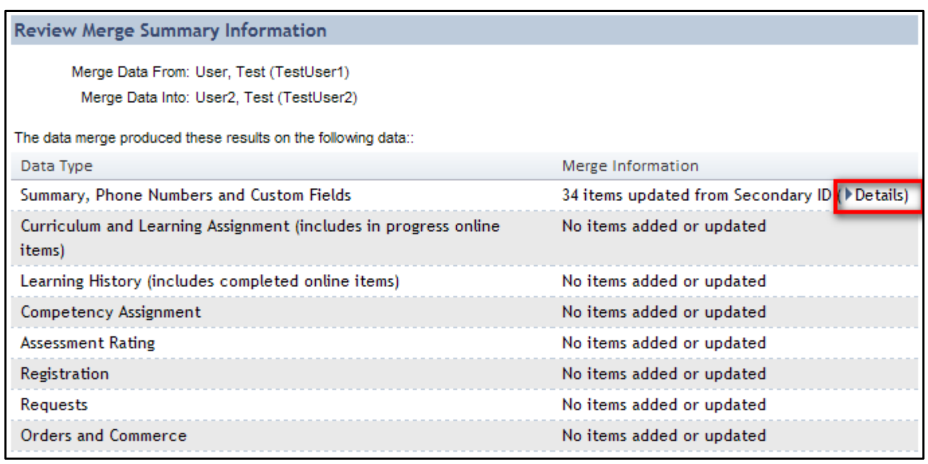
4. Identify the secondary, or "**Merge From User ID**", user record by selecting the appropriate radio button.
5. Identify the primary, or "**Merge Into User ID**", user record by selecting the appropriate radio button.



6. Click the **Merge** button to merge the records together into one. A confirmation window displays.
7. Click **OK** to continue.



8. Review the merge. Click **Details** for additional information about the merge.
   Note: In most cases, when records conflict, the primary record remains intact. Where the primary record has no data, the secondary record populates the primary record.



Review Merge Summary Information

Merge Data From: User, Test (TestUser1)

Merge Data Into: User2, Test (TestUser2)

The data merge produced these results on the following data::

Data Type	Merge Information
Summary, Phone Numbers and Custom Fields	34 items updated from Secondary ID (Details)
Curriculum and Learning Assignment (includes in progress online items)	No items added or updated
Learning History (includes completed online items)	No items added or updated
Competency Assignment	No items added or updated
Assessment Rating	No items added or updated
Registration	No items added or updated
Requests	No items added or updated
Orders and Commerce	No items added or updated