

Job Aid: Merge User Records

Course: Learning Needs Management

Topic Lab: Merge User Records

Prerequisite Courses

- Introduction to LearningLink Administration
- Learning Needs Management

Description

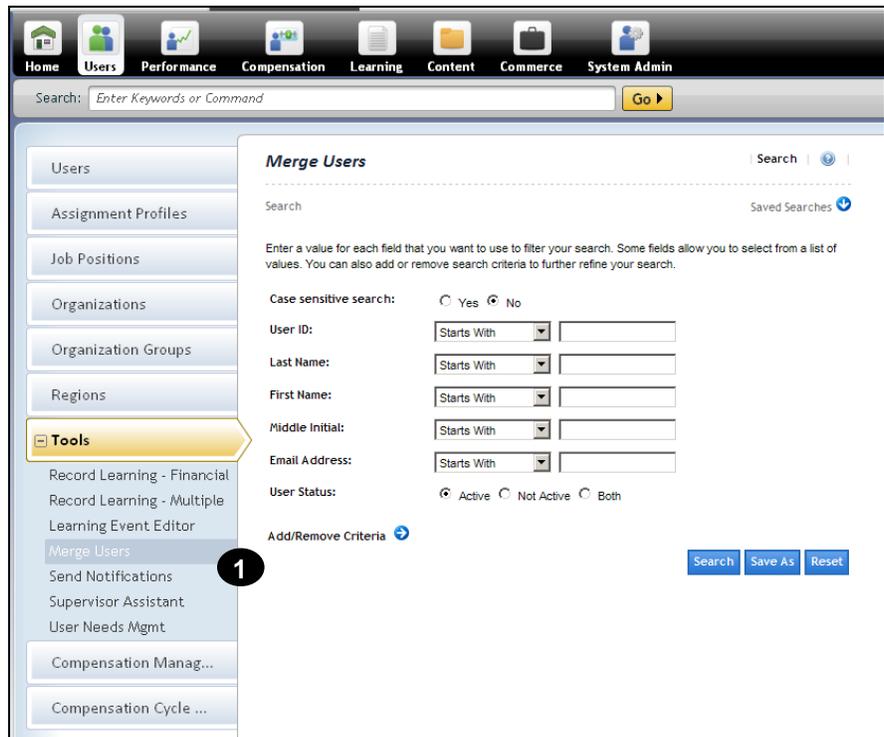
The purpose of this job aid is to guide administrators through the step-by-step process of merging user records.

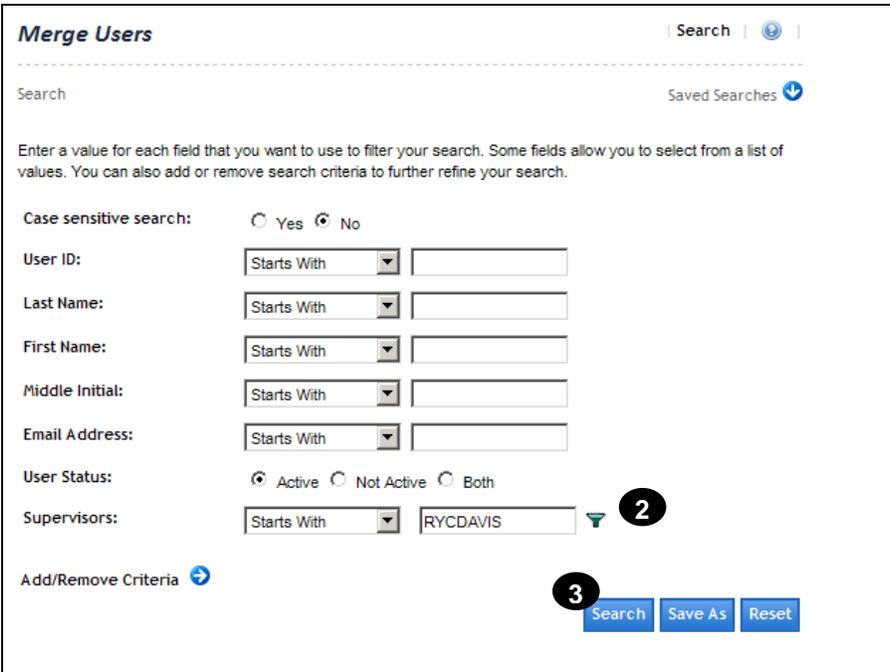
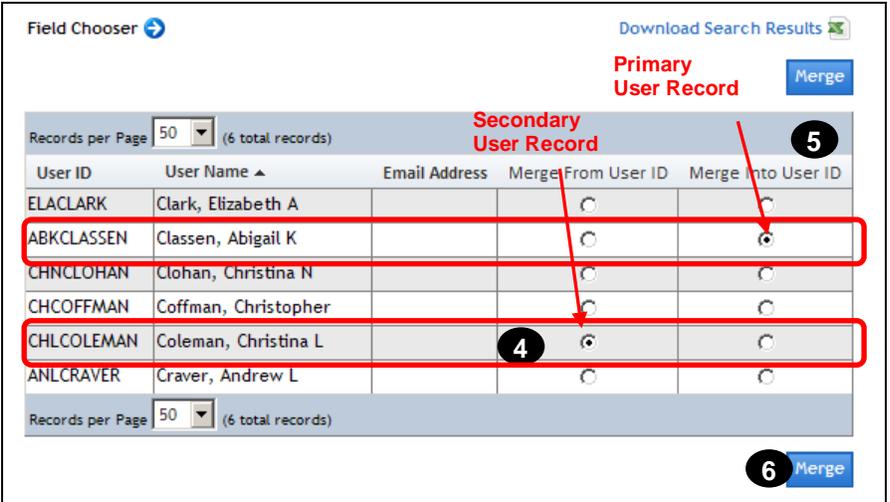
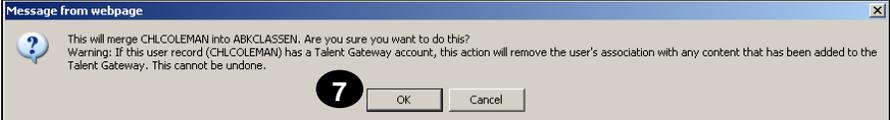
Tasks

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

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

1. Navigate to Users > Tools > Merge Users.



<p>Search for a user by entering criteria for one or more fields.</p> <p>For this example, let's search for all users who report to the same supervisor.</p> <p>2 Enter the supervisor ID in the Supervisor ID field.</p> <p>3 Select Search.</p>	 <p>Merge Users Search </p> <p>Search Saved Searches </p> <p>Enter a value for each field that you want to use to filter your search. Some fields allow you to select from a list of values. You can also add or remove search criteria to further refine your search.</p> <p>Case sensitive search: <input type="radio"/> Yes <input checked="" type="radio"/> No</p> <p>User ID: <input type="text" value="Starts With"/> <input type="text"/></p> <p>Last Name: <input type="text" value="Starts With"/> <input type="text"/></p> <p>First Name: <input type="text" value="Starts With"/> <input type="text"/></p> <p>Middle Initial: <input type="text" value="Starts With"/> <input type="text"/></p> <p>Email Address: <input type="text" value="Starts With"/> <input type="text"/></p> <p>User Status: <input checked="" type="radio"/> Active <input type="radio"/> Not Active <input type="radio"/> Both</p> <p>Supervisors: <input type="text" value="Starts With"/> <input type="text" value="RYCDAVIS"/>  2</p> <p>Add/Remove Criteria </p> <p style="text-align: right;">3 <input type="button" value="Search"/> <input type="button" value="Save As"/> <input type="button" value="Reset"/></p>																																			
<p>4 Identify the secondary, or 'merge from', user record by selecting the associated radio button.</p> <p>5 Identify the primary, or 'merge to', user record by selecting the associated radio button.</p> <p>6 Select the Merge button to merge the records together into one.</p>	 <p>Field Chooser  Download Search Results </p> <p style="text-align: right;">Primary User Record <input type="button" value="Merge"/></p> <p>Records per Page <input type="text" value="50"/> (6 total records) Secondary User Record 5</p> <table border="1"> <thead> <tr> <th>User ID</th> <th>User Name</th> <th>Email Address</th> <th>Merge From User ID</th> <th>Merge Into User ID</th> </tr> </thead> <tbody> <tr> <td>ELACLARK</td> <td>Clark, Elizabeth A</td> <td></td> <td><input type="radio"/></td> <td><input type="radio"/></td> </tr> <tr style="border: 2px solid red;"> <td>ABKCLASSEN</td> <td>Classen, Abigail K</td> <td></td> <td><input type="radio"/></td> <td><input checked="" type="radio"/></td> </tr> <tr> <td>CHNCLOHAN</td> <td>Clohan, Christina N</td> <td></td> <td><input type="radio"/></td> <td><input type="radio"/></td> </tr> <tr> <td>CHCOFFMAN</td> <td>Coffman, Christopher</td> <td></td> <td><input type="radio"/></td> <td><input type="radio"/></td> </tr> <tr style="border: 2px solid red;"> <td>CHLCOLEMAN</td> <td>Coleman, Christina L</td> <td></td> <td><input checked="" type="radio"/> 4</td> <td><input type="radio"/></td> </tr> <tr> <td>ANLCRAVER</td> <td>Craver, Andrew L</td> <td></td> <td><input type="radio"/></td> <td><input type="radio"/></td> </tr> </tbody> </table> <p>Records per Page <input type="text" value="50"/> (6 total records)</p> <p style="text-align: right;">6 <input type="button" value="Merge"/></p>	User ID	User Name	Email Address	Merge From User ID	Merge Into User ID	ELACLARK	Clark, Elizabeth A		<input type="radio"/>	<input type="radio"/>	ABKCLASSEN	Classen, Abigail K		<input type="radio"/>	<input checked="" type="radio"/>	CHNCLOHAN	Clohan, Christina N		<input type="radio"/>	<input type="radio"/>	CHCOFFMAN	Coffman, Christopher		<input type="radio"/>	<input type="radio"/>	CHLCOLEMAN	Coleman, Christina L		<input checked="" type="radio"/> 4	<input type="radio"/>	ANLCRAVER	Craver, Andrew L		<input type="radio"/>	<input type="radio"/>
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<p>A confirmation window displays.</p> <p>7 Select OK to continue.</p>	 <p>Message from webpage </p> <p> This will merge CHLCOLEMAN into ABKCLASSEN. Are you sure you want to do this? Warning: If this user record (CHLCOLEMAN) has a Talent Gateway account, this action will remove the user's association with any content that has been added to the Talent Gateway. This cannot be undone.</p> <p style="text-align: center;">7 <input type="button" value="OK"/> <input type="button" value="Cancel"/></p>																																			

8 Review the merge.

Select **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.

Merge Users | Help |

> Merge Summary

Review Merge Summary Information

Merge Data From: Coleman, Christina L (CHLCOLEMAN)
 Merge Data Into: Classen, Abigail K (ABKCLASSEN)

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

Data Type	Merge Information
Summary, Phone Numbers and Custom Fields	16 items updated from Secondary ID (▼Details) Coach, Company, Email Address, Gender, PIN, Picture, Termination Date, Title
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	1 item added from Secondary ID (▶Details)
Registration	No items added or updated
Requests	No items added or updated
Orders and Commerce	No items added or updated

The following assignment profiles were found to explicitly reference the user you merged FROM. You should examine these assignment profiles to see if you need to change them to refer in the same way to the user you merged INTO.

Assignment Profile ID	Description
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Notes