



Individual Data Cleanup Utility

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Duplicate Individual data can now be easily located and merged using the Individual Data Cleanup Utility. Using custom searching criteria, VISTA will read all Individual records and provide you with an interface to do either a per-record merge or automatically let VISTA take care of the entire dataset for you.

For clients using VISTA's Membership module, the utility also provides a process to cleanup duplicate Membership data.

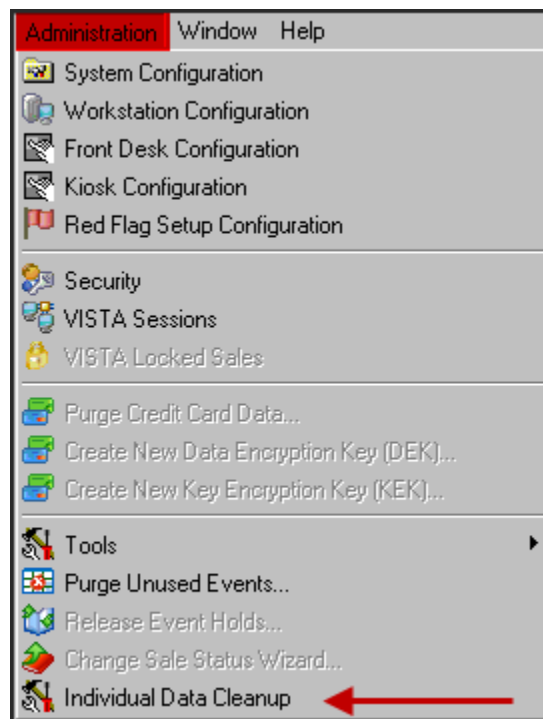
Minimum Requirements

Below are the minimum requirements necessary to use the Individual Data Cleanup Utility.

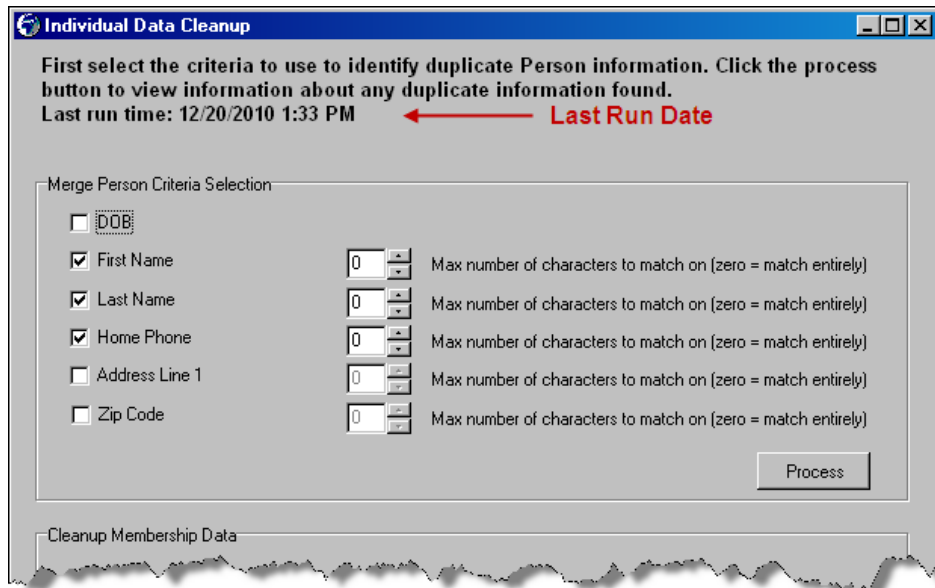
Requirement	Description
VISTA Version	Version 6.02 or later
Security Access	Your user group must have rights under Setup & View Options->Administration

Merge Persons Process

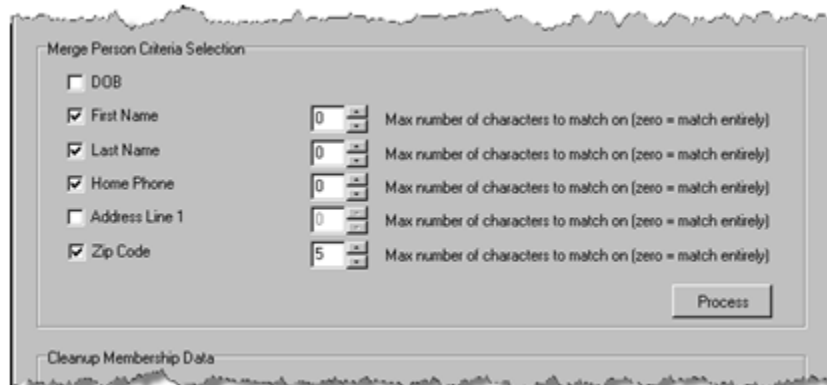
1. From **Administration**, select **Validate Person Data**.



2. Select which **fields** might contain duplicate data
3. Optionally, set the number of **characters** to match on.

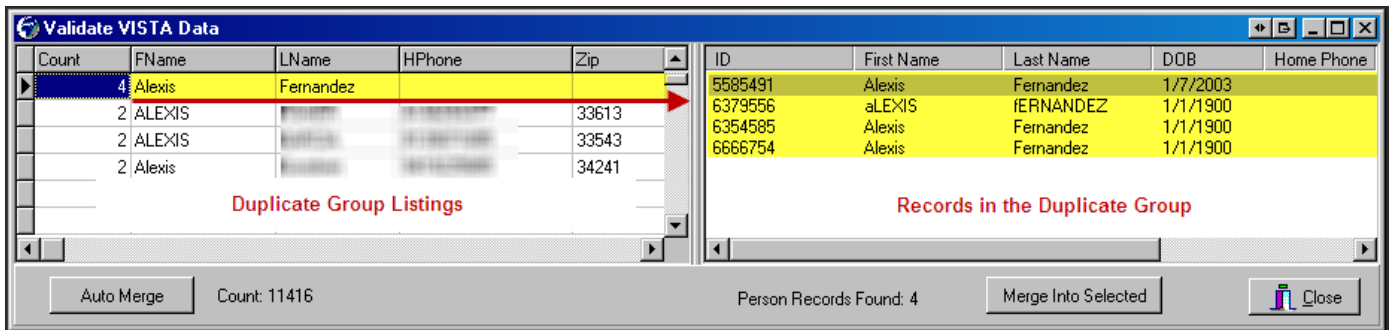


In the example above, the data from all 3 fields must match entirely. A selected field means “match its contents”, but this also includes records where that field is empty; in other words, empty matches empty. You will see this when you view the results.



In this example, a 5 character zip code match has been added. This will return only records with five or more digits, but only if the first 5 digits are identical. This would be useful for merging records with only a five digit zip code into one record that contains the additional four characters of the zip code.

1. Review the **groupings** list and **associated records**.

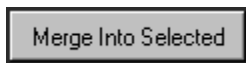


In this example 4 records matched using First+Last+Home Phone. Note that there is a total of 11416 records returned (we do not display number of duplicate groups). Selecting a group on the left will bring the associated records into view on the right.

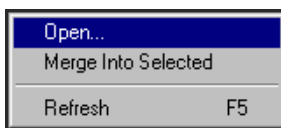
2. Choose an **action** in order for the records to merge together.



Select this action to have VISTA automatically go through each duplicate group and merge its associated records into the original record. Original means the record that was created 1st, based on its system D number.



Select a duplicate group on the left prior to selecting this action; otherwise it will be disabled. This action will merge only the records associated with the select group and ignore all others. Any additional groups would need to be manually merged as well.

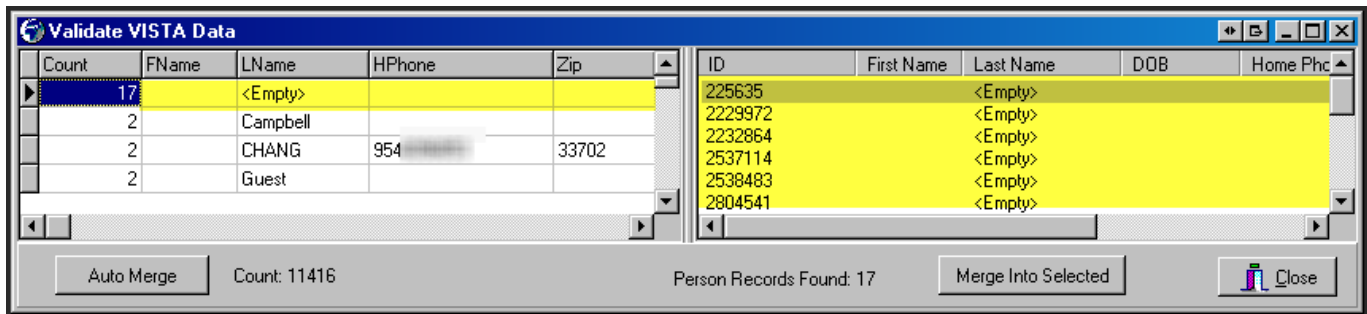


Additionally, if you have the need to drill into a record, you can right-click and choose Open. Make any wanted changes, close the record and Refresh.

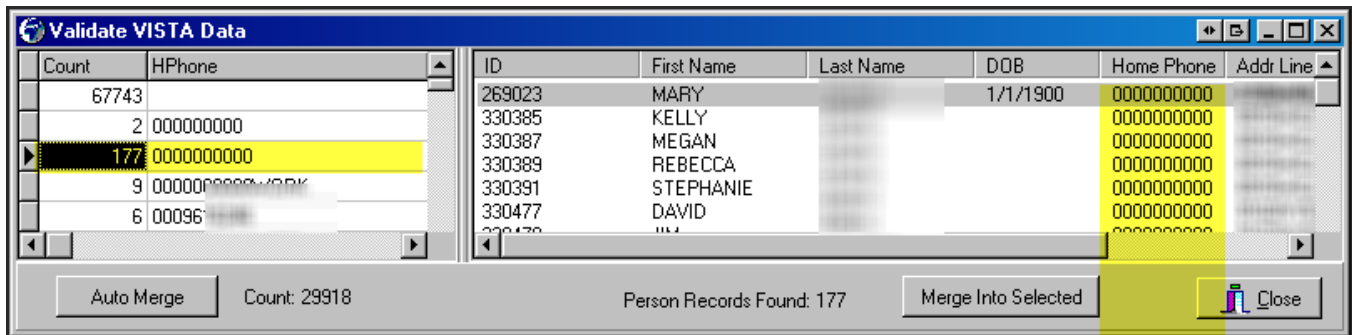
Below are several examples of how to use the selection criteria



Selection was First Name only which found 39 records with no Last Names



Selection was Last Name only which returned 17 records with no Last Name



Selection was Home Phone only which returned 177 records where phone was 000000000. While you most likely would not merge these records, you can see how the utility can assist you with performing simple queries of your data. This is helpful when looking for data capture inconsistencies.

Cleanup Membership Data

Over time, your Membership data may have been duplicated if you used an Import tool to bring over records.

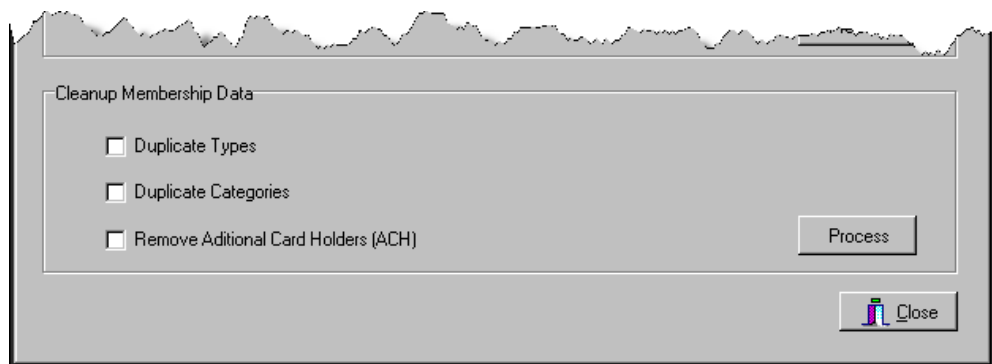
Click the  button

The utility will automatically perform the following tasks:

- Locate all Person records containing identical membership records. In other words, 1 person record linked to 2 or more memberships with the same MemberID
- Merging them into a single membership containing the latest expiration date of the records found.

Cleanup Options

There are 3 options that you may want to include during the membership cleanup process. These are outlined below. These cannot be run independent of the cleanup.



Data Element	Description
Duplicate Types	Selecting will remove duplicate Membership type records (Codes/Membership Types). A duplicate is identified by the description text.
Duplicate Categories	Merges any duplicate categories in the Price module. A duplicate is identified by the description text.
Remove Additional Card Holders (ACH)	Selecting this option will clear all Primary members of their related members (ACH) and remove the membership from those Individuals. It will not delete those records.