SNACSchool 3.2

Module 6: Merge

Updated May 11, 2021
Merge allows SNAC editors to merge together multiple, duplicative records for the same entity by searching, selecting, and automatically combining all the elements from all the records designated for the merge action.

Here are a number of duplicates, and/or near duplicates, for Gloria Steinem. These varying forms result from the ingest of varying name entries from finding aids and other resources during SNAC’s research and development phase.
The SNAC **Browse** search allows you to see duplicates and/or near duplicates positioned close to one another in alphabetical order.
Step 1:

Locate the “main record”, or the record into which you will merge other records.

This will take time as editors must make all efforts to identify the correct record to retain, and which ones to remove during the merge.

Clear duplicate

“Main record” for Gloria Steinem
Step 1 continued …

It’s important to know that during SNAC Research and Development, ingest, data resulted from a large number of finding aids, and in some cases, may have been uncontrolled. You may find one entity’s name presented in a number of configurations.

A good example is a person name in “First name Last name” configuration. Make sure to search “Gloria Steinem” as well as “Steinem, Gloria.”
If a heading appears vague, follow the links to Archival Collections, Related Resources and Related Names in SNAC to confirm a match. You may have to scan linked archival finding aids and CPF links to finalize your merge decision.
Step 2: Designate the records to merge by checking the box to the left of the names.

Once you’ve decided on the records to merge, click the Auto Merge button at the top right.

Please note … you don’t have to merge them all at once. You can choose just two or three at a time as you pare down the list of duplicates.
Step 3: Once the merge is done, SNAC will prompt you to **edit** the new record.

Please note that ALL of the headings from ALL of the merged records are now in the new main record. Editors should remember to edit away, or **Trash** any duplicate **Name Entries** from the **Core Data** tab of the new record. Remember to check other Tabs, History, Demographics, etc., for other duplicate entries.

When done, **Send for Review** as usual.
Also remember that any **Exist Date** and **Place** name data from all the merged records are now combined into one.

Editors should remember to “edit away”, or “Trash” any duplicate entries from all tabs of the record: **History, Demographic, etc.** In this example of dates you can see an incomplete date that needs to be trashed.

When done, **Send for Review** as usual.
What happens to the old SNAC IDs after the merge is complete?

When two or more records are merged, their IDs are kept in the system and are given a sort of "forwarding address" to the new merged record. The old record IDs are kept so we can point users to the new records, and so we can track where merged constellations came from. If you click a bookmark to an old ID, it will look up the new one and send you there.

When this occurs, SNAC provides a notice like this one ...

![Notice](https://example.com/notice.png)

United States. Department of State
Things to be aware of when merging:

- If another person has a record checked out on their dashboard you will NOT be able to merge. You will get an error message. Go back and see what might be checked out (even on YOUR dashboard) and message the editor to release the record. (This is another good reason to merge a few records at a time)

- When in doubt, leave it out! If you’re not 100% sure if the constellations should be merged, err on the side of caution

- During the initial ingest there might have been honorifics ingested (Mrs., Lord, etc.). Do a search or if you think the person might have an honorific attached, do a browse there.
Note also that when you merge, if there are duplicate resources or relations they will be repeated. If there is time, go through and trash those duplicates.