Understanding Duplicate Records

Why Duplicates Occur

Your Internal Processes

There are many situations where your administrative staff may have the need to create new people records in Arena. In each case, the likelihood of a duplicate record being created is directly tied to the process your staff uses to exhaustively search for the record prior to creating a new one. Things such as maiden names, nicknames, address changes, and common typographical errors should be considered when establishing good process with your staff.

Your External Website

While it is true that good data entry processes can reduce the possibility of duplicate people records, they are unavoidable and **will begin to occur regularly** once you enable the **User Login** module and its corresponding **New Account Request** module on your public website. Once enabled, members of your congregation will eventually create an *account* for themselves so they can access additional features of your site, and many of them will probably already have an existing *person record* in your Arena database.

It will be your administrative duty to find these accounts and selectively merge them with the corresponding person record. Once merged, the person who created the account on the website (for such cases) is then able to access any additional details of their person record which you have exposed to them on the website through the use of various Arena modules.

Use Caution When Merging

With the rise of identity theft it is critical to understand the security implications surrounding the merge process.

This simple illustration will help you understand the potential security risks. Someone who knows the name and address of your senior pastor goes to your website and uses the **New Account Request** module to create an account with those details. Once you merge the actual record with the created account, the impersonator will potentially have access to your senior pastor's person record depending on what additional information you expose to those who are logged in (authenticated) on the website.

Although this example is not probable, it is more likely that this situation could occur inadvertently in cases where people share the same name. For this reason the

merging of records (namely those created on the external website) should be done with caution.

Identifying Possible Duplicates

One way to detect possible duplicate records is by combining two features of Arena on a new page that only people with the merge member administration (or similar) can see as shown here:

Setting Up the Page and Module

1. Create a new page under Membership called Possible Duplicates and grant view access to an appropriate role of your choosing (such as **Merge Member Administration**).
2. Add the **Report Grid From Query** module to the Main Content tab and call it something like "Duplicate Finder".
3. Add or verify that the proper role also has view access to this new module.

4. Edit the module's **Query** setting and enter a SQL query such as the following:

```
SELECT '<a href="default.aspx?page=5&duplicateofid=' +
CAST(person_id AS varchar) + '">' + last_name + ', ' +
nick_name + '</a>' AS [Name] FROM core_person WHERE
member_status = 9448 ORDER BY date_created DESC
```

Note: you'll need to change the member status value shown highlighted above to something appropriate to you environment. Typically you'll want to use the same value you've used with the **New Account Request** module's **Member Status** setting on your external website. You can also change the ORDER BY clause to sort them as you see fit.

Using the Duplicate Finder

Once the page and module are configured, the report will generate a simple list of names. Click on one of the names to see the possible duplicates for that name. You will see a typical person listing as shown below.

You may decide it is best in some situations to simply call the person to verify before you merge the records.

References

David Turner's *Report Grid From Query* Post
- http://community.arenachms.com/forums/post/324.aspx

David Turner's *Finding Duplicates* Post
- http://community.arenachms.com/forums/post/216.aspx