

Viewing and resolving duplicates

- Each individual contact in Archie should have a single person record
- Please check for potential duplicates before [creating a person](#)
- Only the Support Team can resolve duplicates
- Check the Resolve Duplicates Wizard regularly to see if your primary group has duplicate records that need resolving
- If you need to resolve a duplicate please contact support@cochrane.org.

Duplicate records and user accounts (Support Team)

When resolving duplicate records, the master record should be the one with a linked user account.

User accounts do not transfer from duplicate to master records when a duplicate is resolved. If the user's account login details are on the duplicate account, they will not be able to log in once the duplicate is resolved.

- Always choose the record with the Cochrane Account as the master record when resolving duplicates. All other contact information and roles can be transferred from the duplicate to the master record.
- Please search for people in both Archie and Editorial Manager before merging duplicates. The same account must remain the primary account in both systems, to allow people to log in after the duplicate is resolved. See [Merge duplicate accounts](#).

To view and resolve duplicates (Support Team)

1. From the menu bar, choose Tools > Resolve Duplicates. The Resolve Duplicates Wizard opens. If you have received a [message](#) about a duplicate being marked, you can also open the Resolve Duplicates Wizard from within that message.
2. Under Primary group of person, there will be a drop-down list of all the groups in which you have permission to resolve duplicates (this should be identical to the list of groups in which you are a Super User). Select the group for which you want to resolve duplicates. Only groups that currently have duplicates will be listed here.
3. On the same screen, the lower box will display a list of all persons with duplicates in the selected group. If there are no duplicates to be resolved, this will be stated. Click the name of the duplicate you want to resolve, then click Next.
4. The next screen will display the duplicate information, consisting of the Master and Duplicate records side-by-side so you can compare them. The label above the record that has been most recently edited or verified will be highlighted in green. At this point you can verify whether the records are indeed duplicates, or should be kept as separate records. To proceed to the editing screens, click Next.
5. The next three screens of the Resolve Duplicates Wizard will allow you to make any changes needed to the Master record. Changes can be made by directly editing the fields in the Master record, by using the drop-down lists provided, or by transferring data from the Duplicate record to the Master record by clicking the arrow buttons. When you are finished making changes to the fields displayed on each page, click Next.
6. The concluding screen will display the edited Master and Duplicate records side-by-side for comparison. Check to make sure all the changes you wanted to make have been entered. If necessary, you can return to earlier screens in the Resolve Duplicates Wizard by clicking the Back button.
7. When you have completed your editing, choose from the list of options displayed in the bottom right corner of the screen:
 - Delete duplicate – move roles to master: Will save changes made to the Master record, delete the Duplicate record, and transfer group and document roles and Notes from the Duplicate record to the Master record;
 - Keep as separate record: Will save any changes made to the Master record and save the Duplicate as a separate record (i.e., no longer marked as a duplicate);
 - Keep as duplicate – resolve later: Will save any changes made to the Master record and leave the Duplicate still marked as such.
8. When you have made your selection, click Finish. The next screen will summarize the results of your actions.
9. To resolve another duplicate, click Restart; this will take you back to the opening screen of the Resolve Duplicates Wizard.
10. To exit the Resolve Duplicates Wizard, click Close, or close the window.

Warnings and special issues

- **Warning:** Clicking Finish in the Resolve Duplicates Wizard anytime prior to the point described in step 7 immediately above will result in the first of the resolution options being selected by default (Delete duplicate – move roles to master). This action cannot be undone.
- **User accounts:** User accounts do not transfer from duplicate to master records when a duplicate is resolved. If the user's account login details are on the duplicate account, they will not be able to log in once the duplicate is resolved. If you delete a record with a user account in error, while resolving a duplicate, you will need to create a new user account on the master record. See [Managing user accounts](#).