

Merge User

This article describes how to use the Merge Users tool to combine two separate user profiles into a single, primary account. This function is essential for maintaining a clean database by resolving duplicate profiles that may arise from user error, name changes, or other data discrepancies. This guide is intended for OPSCOM administrators.

Setup & Configuration

Before a user profile can be selected in the Merge Users tool, you must ensure it meets the following criteria within its profile settings:

- The user account must be **Enabled**.
- The user must have a **User Type** assigned.

If you cannot find a user when searching in the merge tool, first navigate to that user's profile to verify these two settings are correctly configured.

Using this Feature

The merge process involves selecting a source profile (**FROM User**) to merge into a destination profile (**TO User**). The FROM User will be archived, and its data will be transferred to the TO User.

The Merge Process

1. Go to **User Management** and click **Merge Users**.
2. The page displays two search sections:

- The profile on the **left** is the source account that will be merged and then archived (**FROM User**).
 - The profile on the **right** is the destination account that will remain active (**TO User**).
3. Use the search fields in both sections to locate the two user profiles. You can search by name, email address, student number, or employee number.
 4. Select the correct user profile from the search results in each section.
 5. Click the **Merge** button to proceed.
 6. A confirmation screen will appear, showing which user will be merged into the other. To finalize the action, click **Merge** again.
 7. After the process is complete, a confirmation message will appear at the bottom of the page.

Data is only transferred from the '**FROM User**' if a corresponding record does not already exist on the '**TO User**'. The merge tool does not overwrite or duplicate existing records on the destination profile.

What Happens to the Data?

- The **FROM User** (left column) profile is permanently archived and is no longer accessible.
- The **TO User** (right column) profile remains active and inherits the data listed below.
- A record of the merge is logged in the **Completed History** section on the profile of the **TO User**.

The following data is transferred from the FROM User to the TO User:

- Vehicles
- Violations
- Permits
- Lockers
- Items Awaiting Payment

Warning: The merge process is **irreversible** and results in the permanent archival of the **FROM User** profile. Always double-check that you have selected the correct source and destination accounts before finalizing the merge.

Best Practices & Considerations

- **Designate the profile with the most accurate core information as the TO User** (the account on the right). While transactional data is transferred, the primary profile details (name, contact information) of the TO User are what the final, merged profile will retain.
- **Use this tool to resolve common data integrity issues**, such as when a user accidentally creates a second profile, changes their legal name and creates a new account, or when an admin-created profile needs to be consolidated with a user-created one.