

Merge Duplicates - ASSA Pilot



This guide provides step-by-step instructions on how to merge duplicates in the Sportlomo Registration system.

Note: Clubs can only merge duplicates within their own club data. To merge duplicate information between clubs, Swim Alberta must merge the member data. 05/11/2024



For support, please go to the New Registration System page on the ASSA website.

<https://swimalberta.ca/assa-clubs/pilot-new-registration-system/>

Under Resources you can find other Training Guides and our FAQ. Under Support, you will find instructions on where to get help.

Resources



▸ FAQ

▸ Guides

Need Support? We're Here to Help!



For more support, use the following guide to help direct you to the team who is best equipped to help.

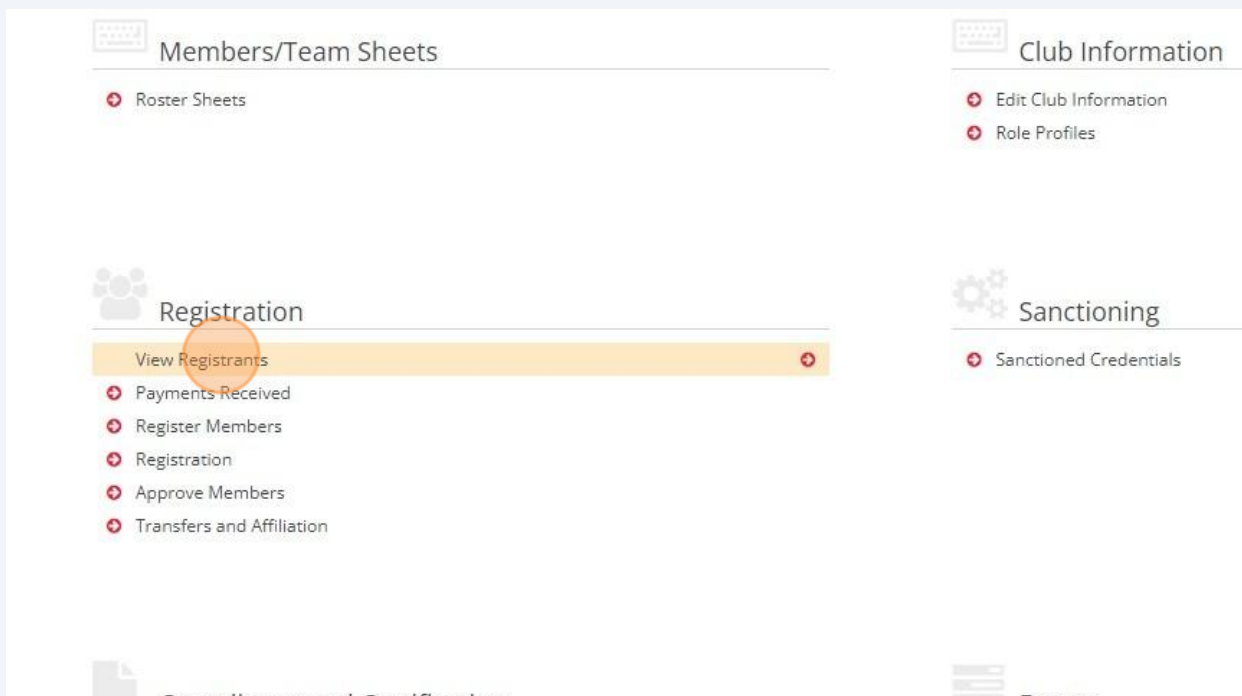
▸ Support

▸ Pilot Feedback

1 Navigate to https://swimming.canada.sportsmanager.ie/club_home.php

2 Login to your Club Registrar account.

3 Click "View Registrants"



4 Click "Manage Duplicates"

Membership

Options

Approve Members View Payments Export **Manage Duplicates**

Search/filter options

Gender	<input type="text"/>	Season	2023-2024
From Dob	yyyy-mm-dd <input type="text"/>	Club	Type to Search for a club
To Dob	yyyy-mm-dd <input type="text"/>	Membership Status	Active
From Registration Date	yyyy-mm-dd <input type="text"/>	Primary/Dual	All

5 Change the Season to the top option (blank) to select all seasons.

[← Back](#)

Options

View Payments Export **Manage Duplicates**

Search/filter options

<input type="text"/>	Season	<input type="text"/>
yyyy-mm-dd <input type="text"/>	Club	Type to Search for a club
yyyy-mm-dd <input type="text"/>	Membership Status	Active
yyyy-mm-dd <input type="text"/>	Primary/Dual	All
yyyy-mm-dd <input type="text"/>	Category	<input type="text"/>

6 Change the Membership Status to "All" to see swimmers that are not active.

Options

View Payments

Export

Manage Duplicates

Search/filter options

Season

Club

Membership Status

Date

Primary/Dual

Category

Category

Type

Category Group

7 Click "Search".

Registration

Approve Members

View Payments

Export

Manage Duplicates

Search/filter options

Member ID

Gender

Season

From Dob

Club

To Dob

Membership Status

From Registration Date

Primary/Dual

Address

To Registration Date

Category

Email

Identifier Type

Type

Member Identifier

Category Group

Search

8 Choose one of the duplicates and click on the "Merge" button under Actions.

dd Primary/Dual All

dd Category

Type

Category Group

Season	Active	Possible Duplicates	Actions
2022-2023		1	
2019-2020		1	

rows per page 15

9 If you click on the Member ID of the bottom record, that will become the "Master Record" for the merge.

1. Member Selection 2. Data Review 3. Summary

Possible Duplicates

Member ID	First Name	Last Name	DOB	Email
SC2-	Anna	N	10/06/1970	@hotmail.com
SC2-			06/10/1970	@hotmail.com

Use as Master Record

Member Details

Member

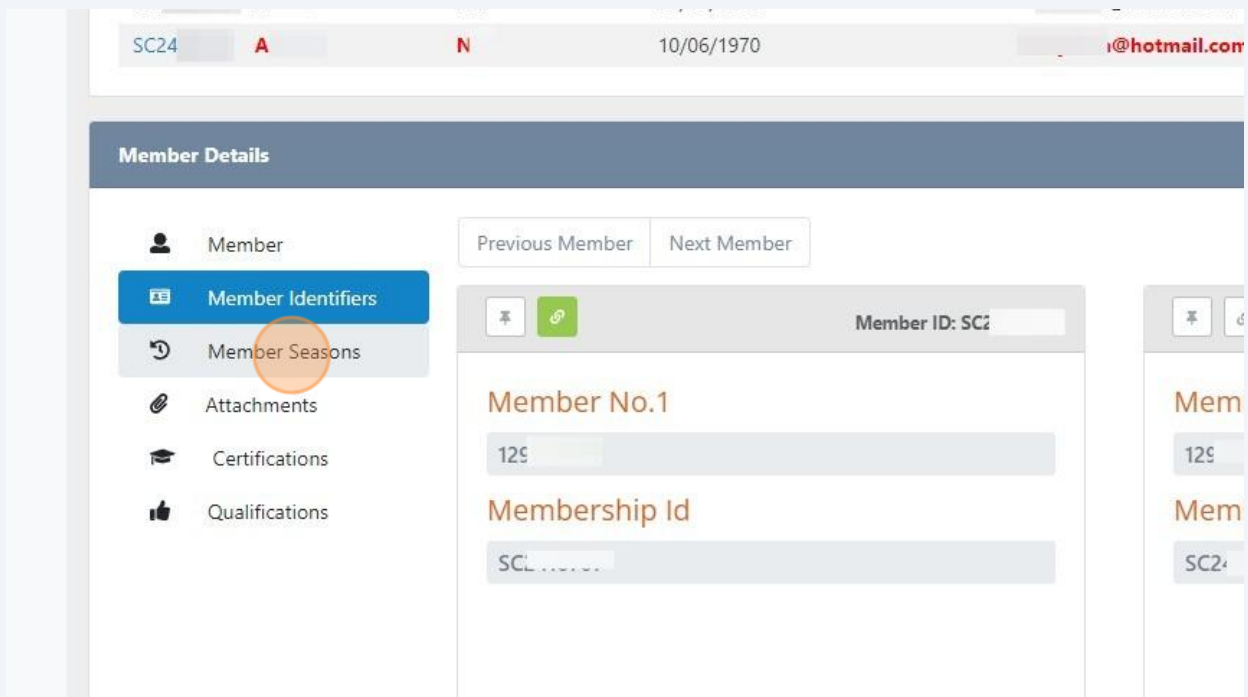
Member Identifiers

10

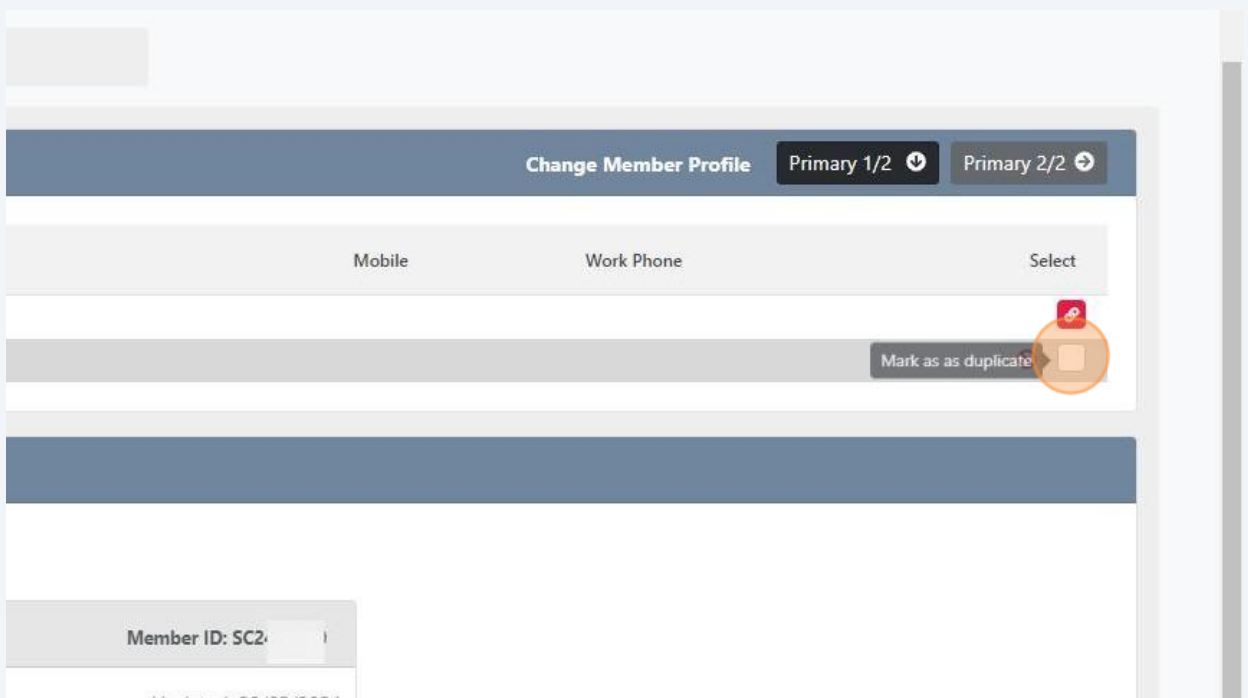
To determine if the record is a duplicate, click on the Member information on the left and compare the data in the 2 records.

The screenshot displays a web interface for member management. At the top, a header bar shows the member ID 'SC24', the name 'An N', the date '10/06/1970', and the email 'i@hotmail.com'. Below this is a 'Member Details' section with a navigation menu on the left containing 'Member', 'Member Identifiers', 'Member Seasons', 'Attachments', 'Certifications', and 'Qualifications'. The 'Member' item is highlighted with a blue bar, and the 'Member Identifiers' item is highlighted with an orange box. The main content area shows two member profiles side-by-side. The left profile is for Member ID 'SC24', updated on 23/02/2024, with a birth date of 06/10/1970 and gender 'Male'. The right profile is for Member ID 'SC', updated on 20/02/2024, with a birth date of 10/06/1970 and gender 'Male'. Both profiles show identical fields: Membership ID, First Name, Last Name, Public User Account ID, Public User Account, Roles, and Associations.

11 Click "Member Identifiers", "Member Seasons" and compare the information.

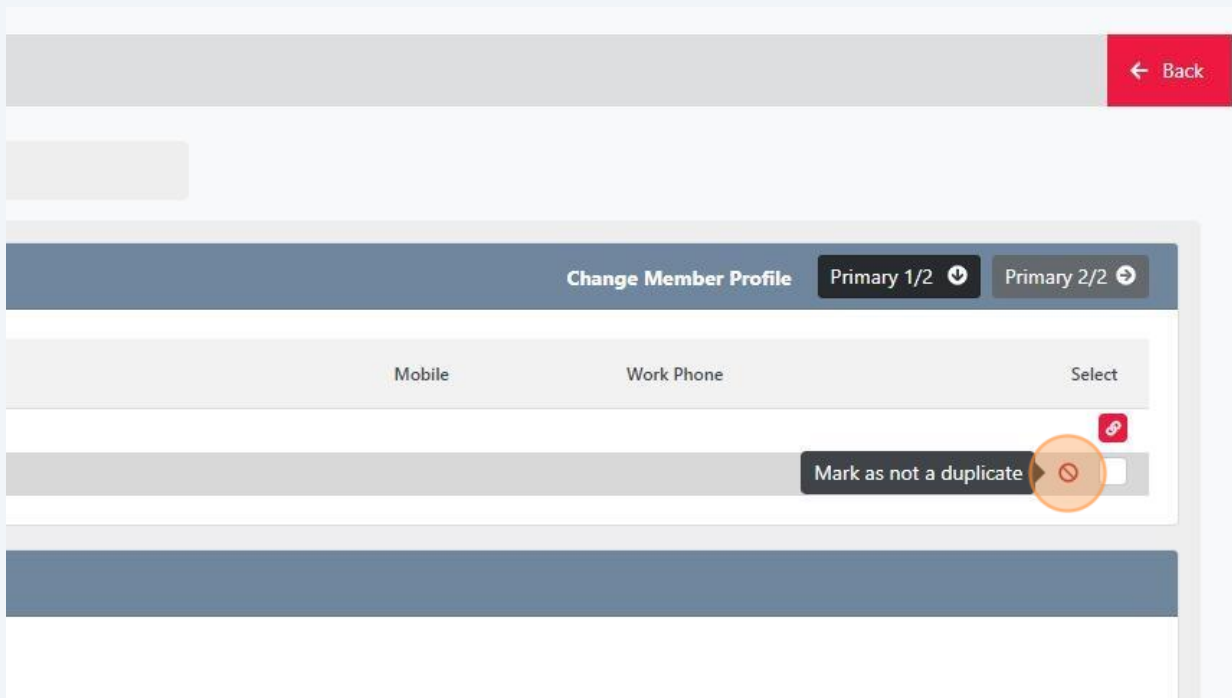


12 If the Members are duplicates, link the information in the second record by clicking the "Mark as duplicate" button.



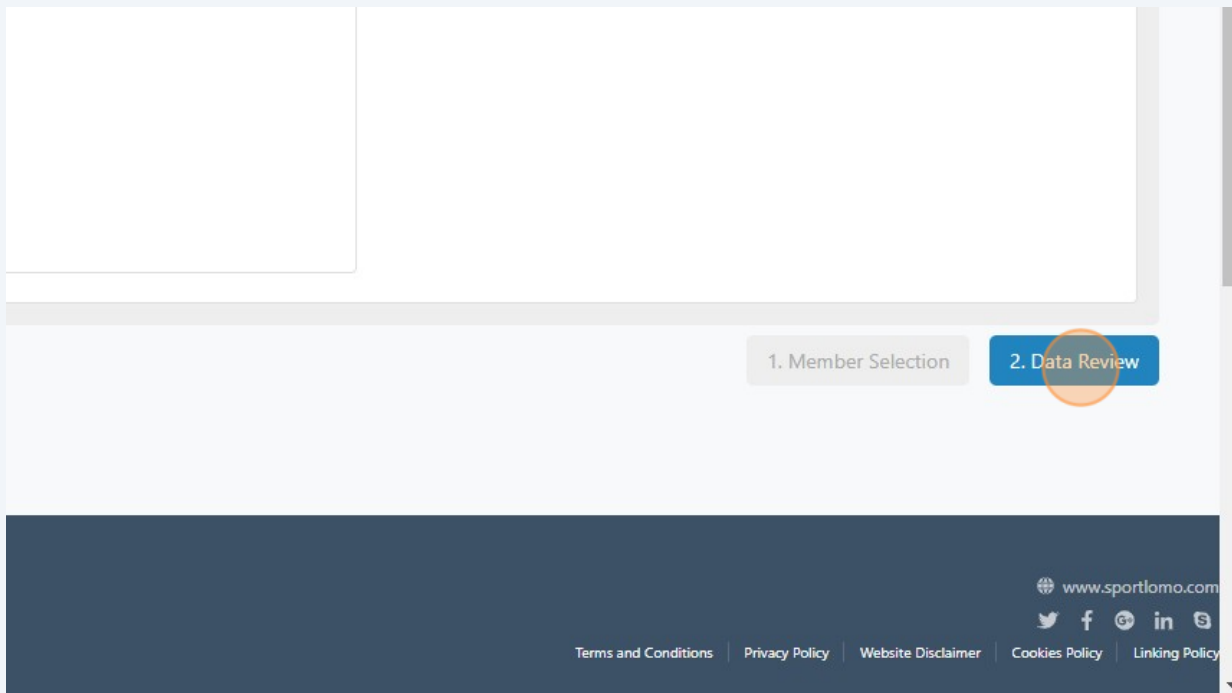
13

If the Members are NOT duplicates, click on the "Mark as not a duplicate" button to remove the connection between the records.



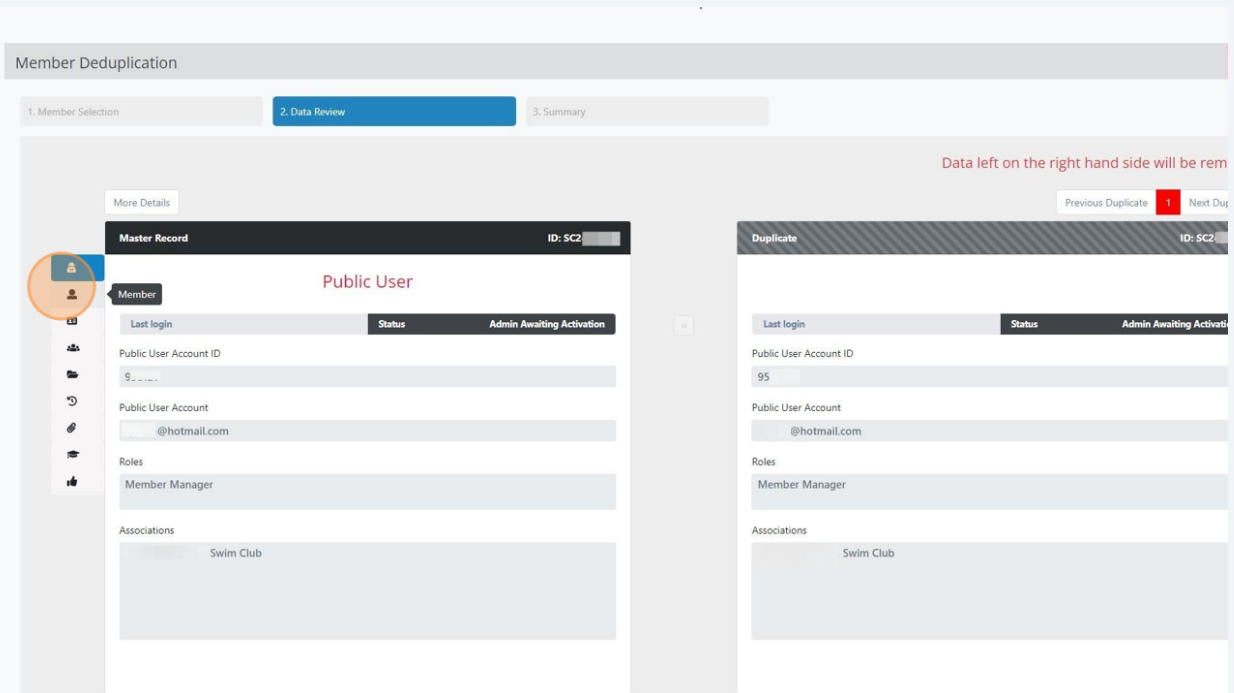
14

To Merge the member data, click on "Data Review".



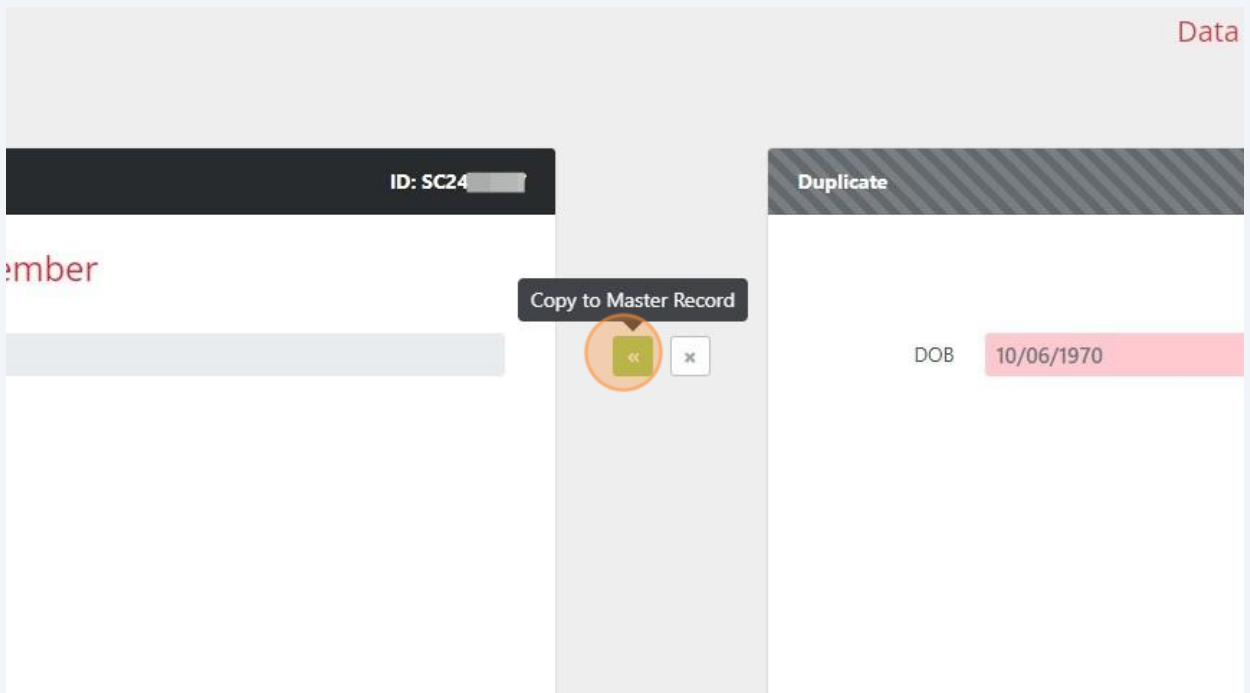
15

The Master Record will be on the left. Click through the Member data by clicking the icons on the left side to compare the records.



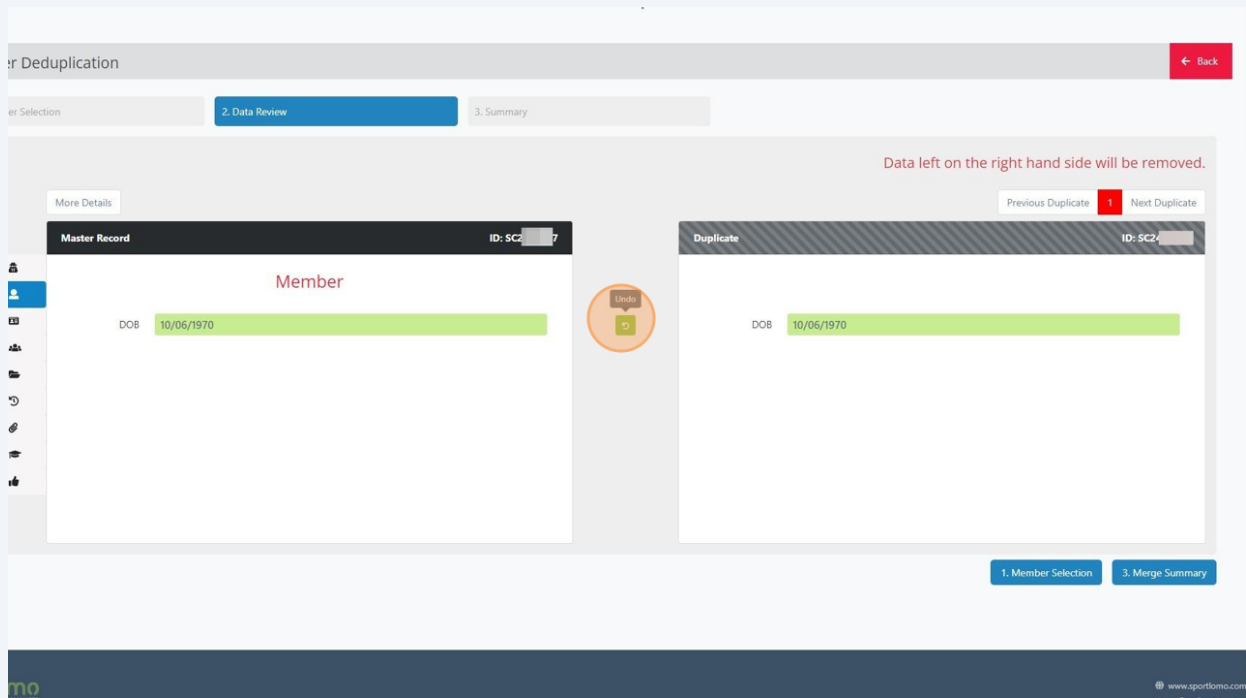
16

If there is information to move to the Master Record, click the "Copy to Master Record (<<)" icon. If the information should not be copied, click the x icon.



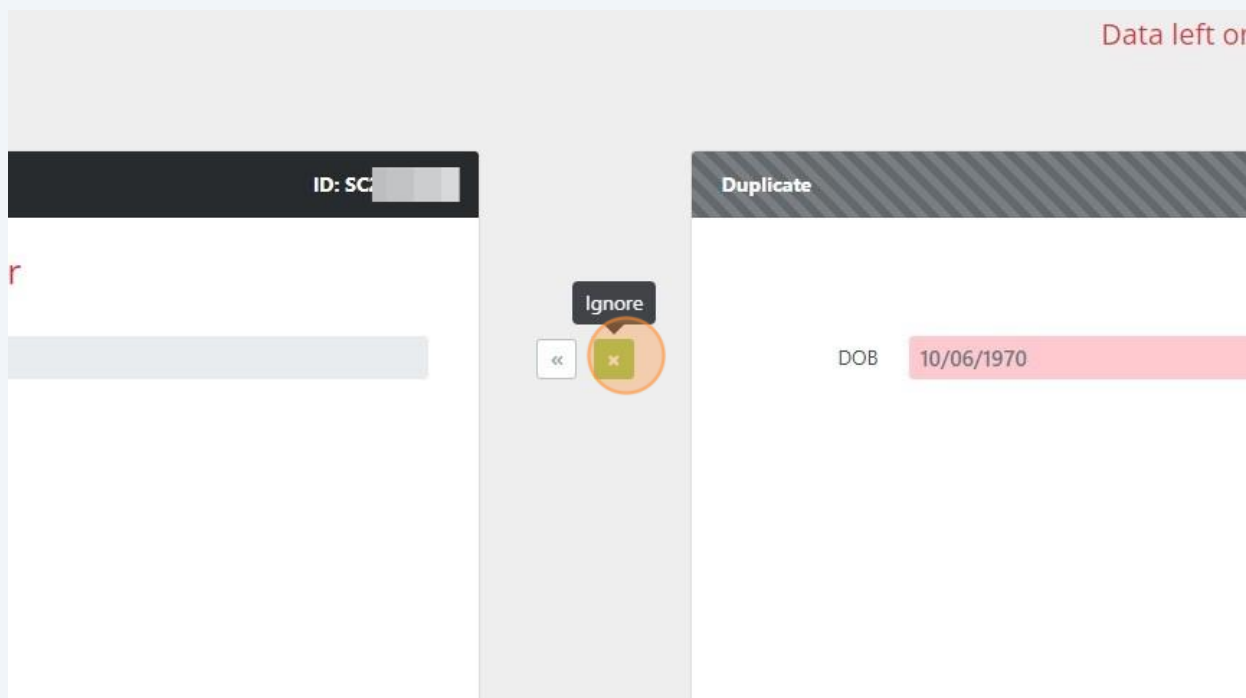
17

You can click the "Undo" button if you want to revert to the information in the Master Record.



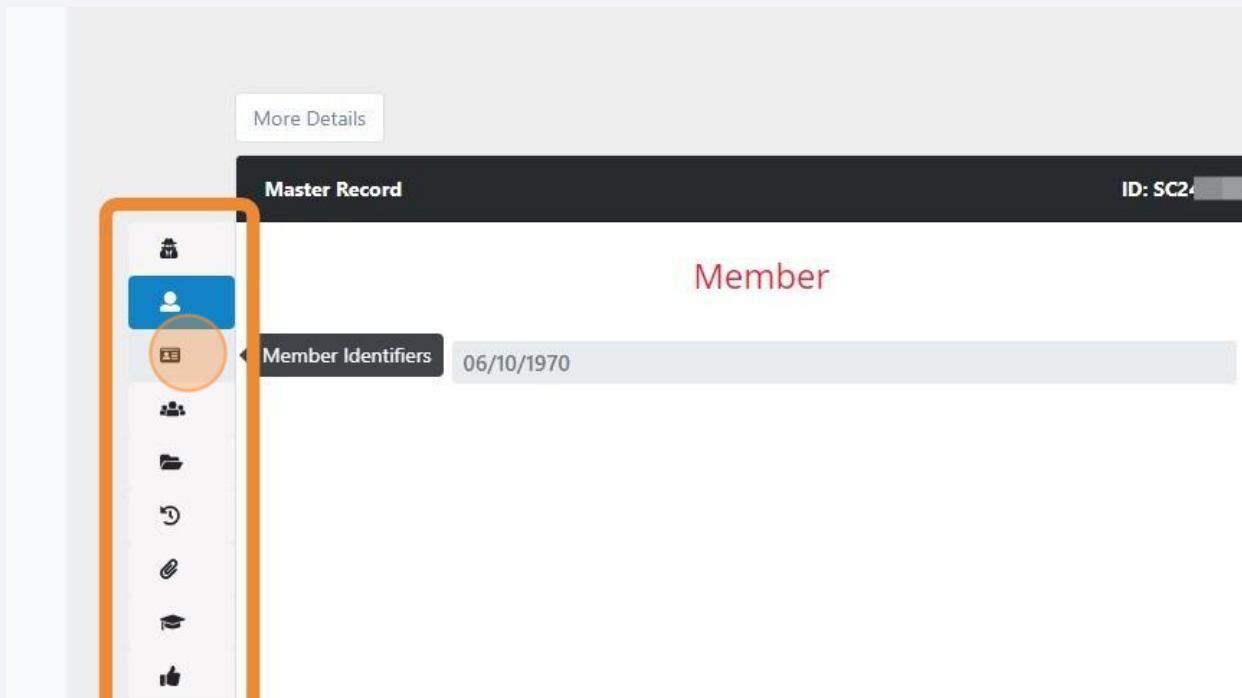
18

Click the "Ignore" button if you want to keep the information in the Master Record.



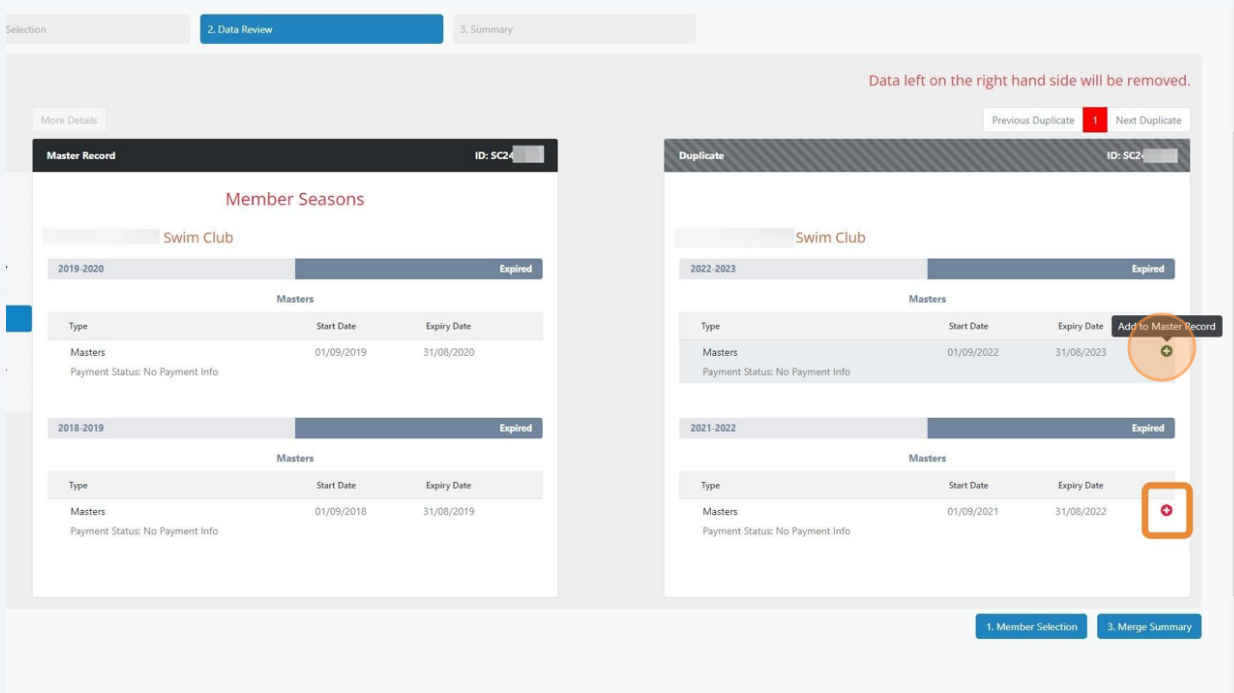
19

Click "Member Identifiers", "Profiles" and "Member Seasons" and compare the data.



20

Click the + (Add to Master Record" to add Season data to the Master Record.



21 You can also click the trash can icon to Remove from Master Record.

The screenshot shows a web application interface for a 'Swim Club'. The page displays a list of 'Masters' records for various seasons, including 2019-2020, 2018-2019, 2022-2023, and 2021-2022. Each record is shown in a table with columns for 'Type', 'Start Date', and 'Expiry Date'. The 'Payment Status' is listed as 'No Payment Info'. A trash can icon is visible next to the 2022-2023 record, and an orange circle highlights it with a tooltip that says 'Remove from Master Record'. At the bottom right, there are two buttons: '1. Member Selection' and '3. Merge Summary'.

Type	Start Date	Expiry Date
Masters	01/09/2019	31/08/2020
Masters	01/09/2018	31/08/2019
Masters	01/09/2022	31/08/2023
Masters	01/09/2021	31/08/2022

22 Click "3. Merge Summary" to verify the Master Record is complete.

The screenshot shows the same web application interface, but the main content area is mostly blank. At the bottom right, there are two buttons: '1. Member Selection' and '3. Merge Summary'. The '3. Merge Summary' button is highlighted with an orange circle.

23

Click the tabs in the left column to verify the information in the Master Record is correct.

The screenshot shows a user profile page for a 'Public User'. The page has a dark blue header with the word 'Summary'. Below the header is a 'More Details' button. The main content area is titled 'Result Record' and 'Public User'. The user's ID is partially visible as 'ID: SC'. The user's status is 'Admin Awaiting Activation'. The user's last login is listed as 'Public User Account ID 95'. The user's email address is '@hotmail.com'. The user's role is 'Member Manager'. On the left side, there is a vertical navigation menu with several icons. The top icon, which is a person, is circled in orange. The 'Member' tab is also highlighted in orange.

24

Once the information is verified, click the acknowledge button. Note that after the data is merged, any missing information in the Master Record will be lost.

The screenshot shows a data review page. The page has a dark blue header with the word 'Summary'. Below the header is a 'More Details' button. The main content area is titled 'Payment Status: No Payment Info'. The page displays a table of Masters records. The table has three columns: 'Type', 'Start Date', and 'Expiry Date'. The table contains three rows of data, each representing a different year: 2018-2019, 2022-2023, and 2021-2022. Each row has a 'Masters' type and a 'Payment Status: No Payment Info'. The 'Start Date' and 'Expiry Date' are listed for each row. The 'Expiry Date' for all rows is 'Expired'. At the bottom of the page, there is a checkbox with the text 'I acknowledge that upon member merge, any data that weren't copied over to a master record will no longer be available.' The checkbox is circled in orange. At the bottom right of the page, there are two buttons: 'Data Review' and 'Merge Duplicates'.

25

Click "Merge Duplicates" to complete the Merge.

knowledge that upon member merge, any data that weren't copied over to a master record will no longer be
lable.

2. Data Review

Merge Duplicates