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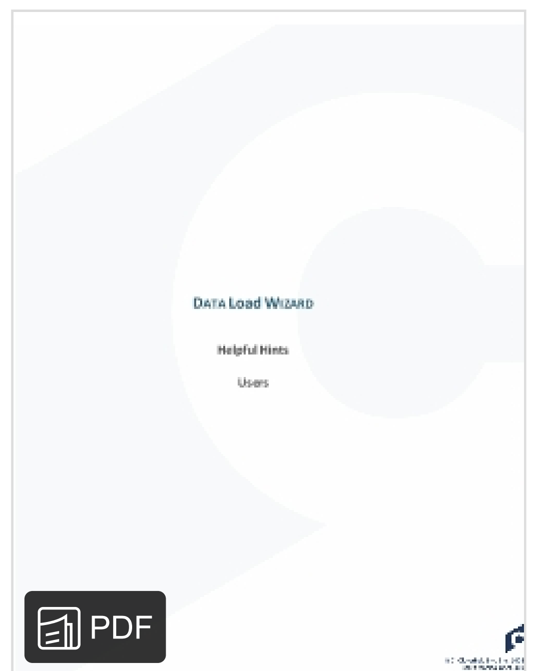
Space tools

Data Merge

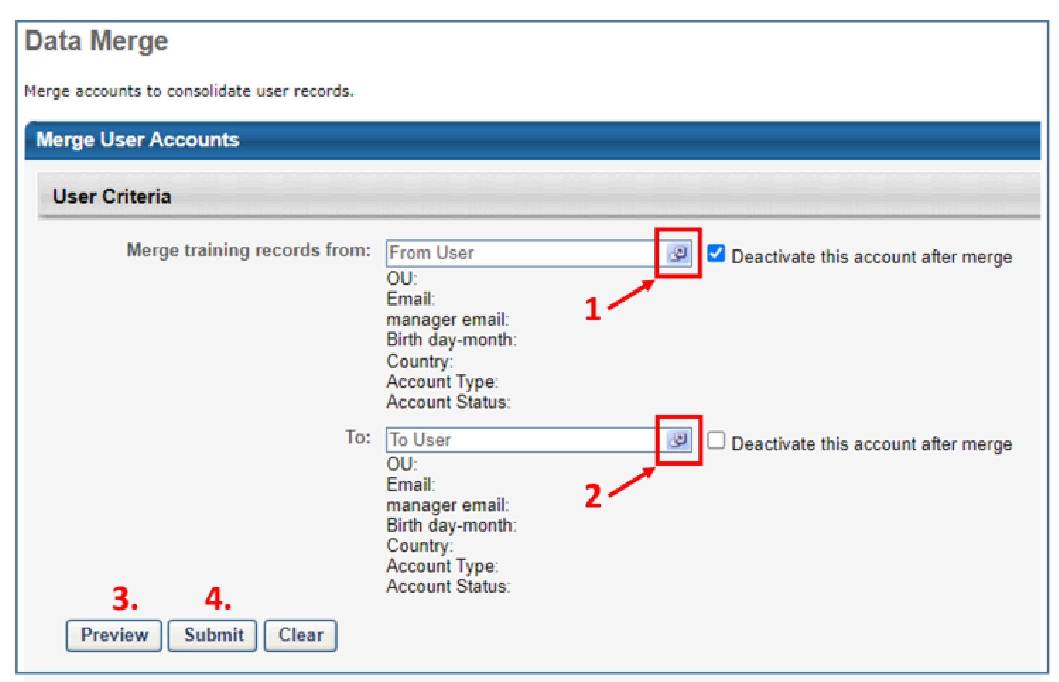
Created by Bowllan, Paul, last modified by Harris, Jeffrey on 03/03/2022

1. **Data Load Wizard Helpful Hints**



Open the Data Merge Tool using your MyPath Admin account go to: **System Management / Data Merge**

1. Click the search icon to locate the Donor User Account. If you would like to deactivate the donor account after the process runs, place a checkmark next to the search field.
2. Click the Search icon to locate the "Recipient" for the data records
3. Click Preview to check which records will be transferred in the process
4. Click Submit to process the request.



General Rules
Both the Donor Account and Recipient Account must be active to process correctly

The process works best when the Donor account is providing 50 or fewer courses.

Data Merge tool does not merge a training item if it already exists on the recipient account; this includes equivalencies, other versions of the training, and if the training is used in a certification.

If the same training item is listed on both training records, the one in the recipient account remains and the one in the donor account is not merged, regardless of the status or version of either course.

Additional Information
There is a published list of rules that govern the Data Merge tool that can be found in Online Help:
https://help.csod.com/help/csod_0/OnlineHelp.htm#Data_Merge/Data_Merge_Rules.htm

Resolve Discrepancies
If the data merge fails due to these rules, then your options are to either:
1. Work with your account manager to have a project scoped to have the developers complete the merge
2. Add the training yourself using the Learning Assignment Tool and then Modify the dates and transcript status using the Training Update Tool

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