ChurchWatch Newsletter #11
August 2009

Cleaning Up Duplicate Entries in Your Registers Lists

This newsletter describes a little known, powerful, feature of ChurchWatch, a hidden gem in the Registers Manager.

Several years ago, White Mountain Software purchased the customer list of PerSey software. Those customers were moved over to ChurchWatch software. As part of that agreement, White Mountain Software added the Registers Manager to our software to accommodate the registers data that was originally stored in PerSey. There was, and still is, one small problem. The data in PerSey was free-format, meaning that common items like places, churches and pastors/priests, were entered over and over again by hand. This always results in a mess and many close-but-not-quite-the-same duplicate entries. To make it even worse, the same data is used across all registers modules, meaning that it would have to be entered over and over again, with no guidelines on the format or spelling.

This very much goes against the design of ChurchWatch. ChurchWatch always attempts to keep your data "clean" with no duplicate entry of data. We use user-defined lists wherever possible to minimize data entry and duplication of data. So the import of this "messy" data was disappointing. Since the data was simply imported from PerSey, there was really nothing that could be done to auto-correct the data. We did, however, add three (3) features to help clean up the data, and to keep it that way.
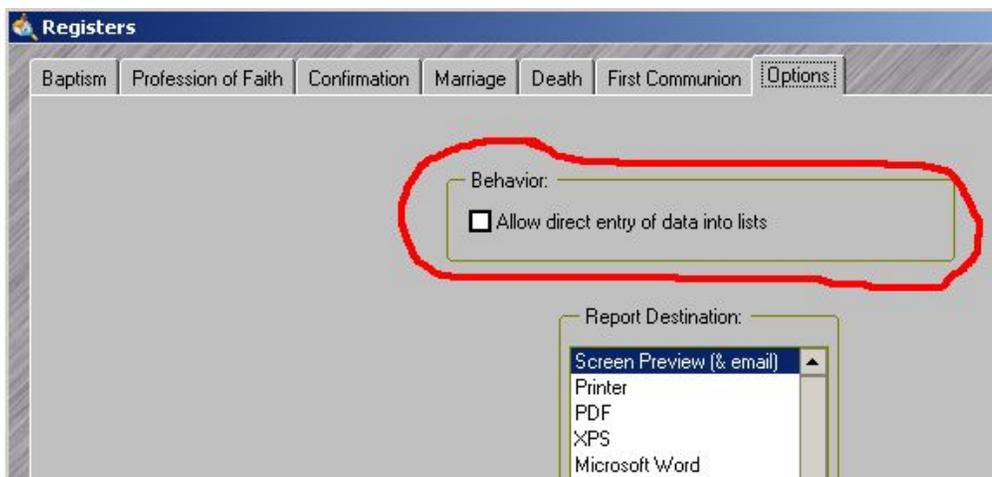
1. By now you are likely aware that the Registers Manager uses lists for common items like places, churches and pastors/priests. Since Version 5, this behavior is now optional and we'll discuss that in a moment.

2. There is a hidden feature in ChurchWatch that allows you to clean up the duplicate entries in these lists.

3. Duplicate entries are not allowed and you'll be warned about that if you attempt to enter one.

List Behavior Options

First all, though we don't agree, many PerSey customers were used to the free-form data entry that the PerSey software provided and many customers wanted that feature back. As a compromise, and since Version 5, we have allowed the list behavior to be strict, or free format, your choice:

a. **Strict Format** – by default, the lists are "strict" format. That means that you have to predefine the list items, then select an item from the list when doing Registers data entry. This method keeps the lists as clean as possible.

b. **Free Format** – On the options page of the Registers Manager, there is a checkbox for allowing direct entry into the listboxes at data entry time. This means that you can type new names directly into the data field, rather than using the pull down list. When you do this, ChurchWatch will first look for a matching, existing entry in the list and will use that if possible. If not existing (ie it's a new name or place), ChurchWatch will automatically add the name to the list. While this saves some time, it does not fully protect against duplicate entries. For example if you entered "Joe Smith" and then next time "J. Smith" or even "Joe   Smith", these would all be added to the list even though it's the same pastor/priest 3 times over.

   NOTE: In Free-Format mode, the pull down lists still work as well.

Cleaning Up Existing Lists

So what do we do about duplicate data that existed before it was imported to ChurchWatch? Anywhere that pull-down lists are used in the Registers Manager, there is a little known feature behind the scenes that can assist you in the cleanup.

Suppose we have a Reverend list that has the same name twice, spelled the same, but with an extra space between the first and last name. Clearly these are duplicate entries. Easy for a human to spot, but not so easy for a computer. Manual cleanup would be daunting indeed considering that you would have to find ever registers entry in every register that is using the bad name, change each record to the good name, and then delete the bad name from the lists. No thanks. The good news is that ChurchWatch will do this for you.

Let's continue with the example. First of all, we notice that we have the duplicate name problem when we open the list:

We notice that we have "Jack Walters" in the list 4 times, all with slightly different formatting, but the same person nonetheless. First of all, take note of the one that's correct, the one you want to keep. In this example, suppose we choose "Jack Walters" with one space between the first and last name as the item we like to keep.
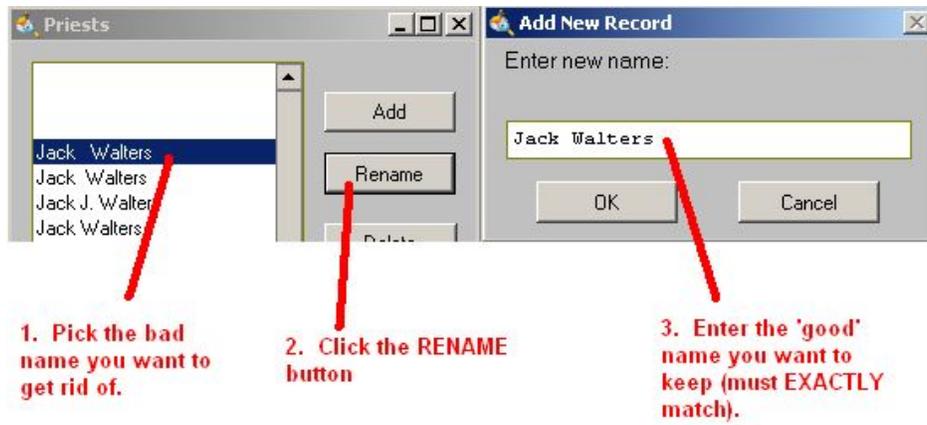
Your first notion will be to delete the bad entries using the list editor and the Delete button (click the list buttons to the right to open the appropriate list editor). But when we do that we get an unexpected warning:

Although we'd like to get rid of the "Jack Walters" entry, ChurchWatch is warning us that it's already in use. Simply deleting it would be a bad idea, unless for some reason this is intentional. By "blanked out" the warning is meaning that the entry will be deleted from the list and the reverend field in ALL records in ALL registers that have this reverend name will be deleted (blanked out). To be clear, no records will be deleted, but the reverend field would be set to blanks if it was using this reverend that we are deleting.

Clearly this is not what we want and instead of cleaning up the list, we're making it worse, losing data now.

The solution is to use the RENAME in the list editor instead. Choose one of the bad names (for example "Jack   Walters") and RENAME it to exactly match the good name (for example "Jack Walters") you want to keep.

Click the OK button once the new name is entered. Now here's where the hidden feature kicks in. ChurchWatch will notice that the name you entered already exists. Normally that would be a duplicate name error, but here ChurchWatch is a little smarter. You will see this prompt:

Click the YES button and the magic will begin. ChurchWatch will:

1. Use the new name (ie the 'good' name) instead
2. Will go through ALL registers data and correct the reverend field to match this good name where the old, bad name was being used.
3. Delete the 'bad' name.

If you click NO, ChurchWatch will treat it as a normal duplicate name error and nothing happens (no rename, no data changed). Remember, ChurchWatch does not allow duplicate data entry.

This operation will happen almost instantly and the list will be updated to remove the old 'bad' entry. Here's the resulting list in our example:

You can repeat the above steps to further clean up the lists. Since the same data is used in all Registers, you've cleaned up the Reverend lists for all registers at the same time. While tedious, this is still much better than manually editing the registers data and lists!