

# Merging Data Together in *Auction!*

*Auction!* includes a very powerful tool, **Merge**, in its **Multi-User & Network** editions.

**Merge** is designed to “hot-synch” or “stitch together” work done independently by two or more team members working on your auction.

Instructions shown are designed for merging data from a colleague’s computer to your computer, via portable storage device, such as a flash drive or floppy disk. You can transfer the backup file via e-mail—see your e-mail program for instructions on attaching files and downloading files. You can merge either direction.

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#### Tip

*Merge to your computer only updates your data; it does not revise the backup from which you are merging.*

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#### Tip

*Depending on options selected and modification dates of individual records, you can get the identical or different results on two computers when merging both directions. When your goal is to have identical copies on all computers, use **Backup and Restore from Backup** to put data on other computers after merging all data to one computer.*

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#### Tip

***Merge** is always **additive**. When you delete a record in one copy of a dataset, and it has been retained in another dataset, it **will reappear** after merge.*

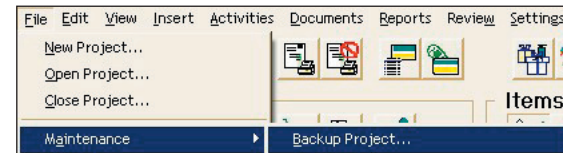
*To delete records permanently, the record must be deleted in **all** copies of the data, or after merging to a consolidated dataset that will be restored from backup to other machines.*

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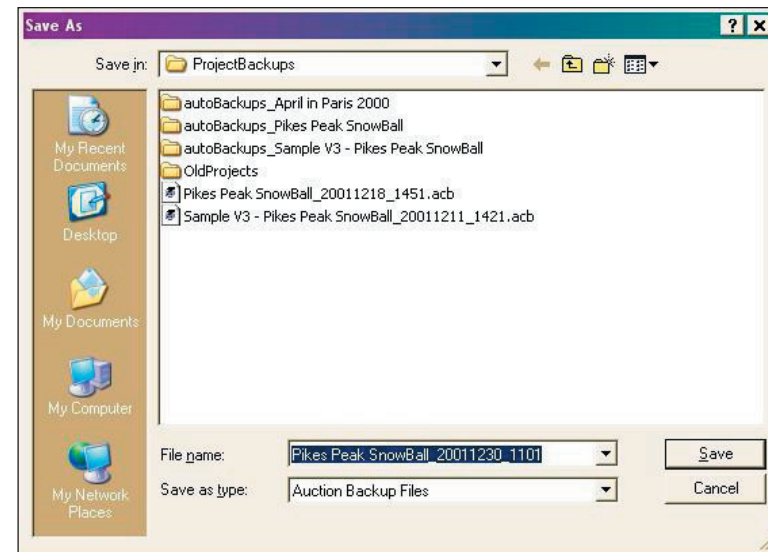
## Merging Data Together (Multi-User and Network Editions only)

On your colleague’s computer:

1. (Network Edition Only) Click **Settings, Switch to Exclusive Access**.
2. Click **File, Maintenance, Backup Project**.



3. Select the portable storage device (its letter will usually be after d:) or floppy drive (usually a:) as the destination. This is different from the default backup storage location. You can



change the filename if desired; we recommend using the default name, since it contains a date and time stamp.

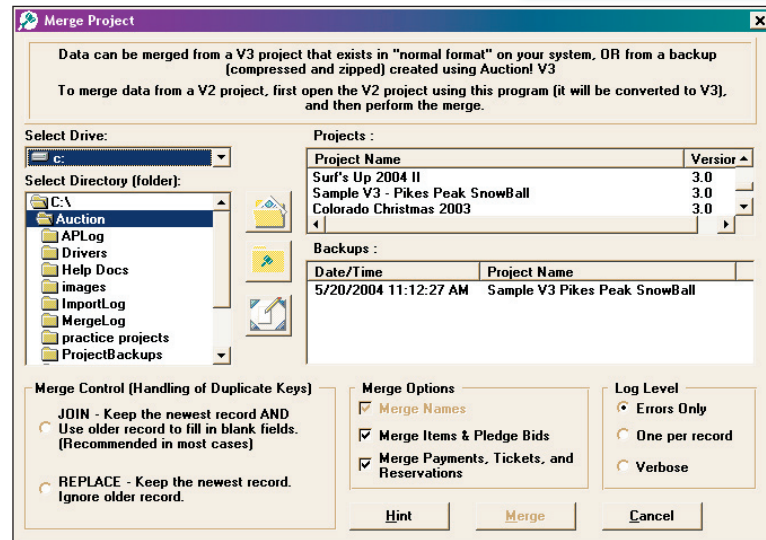
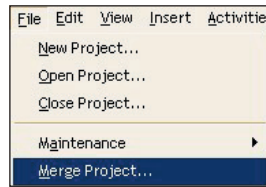
- When backup is complete, and the portable device or floppy drive is no longer operating, **eject** the device and bring it to your computer.

**Note**

*You may need to exit Auction! to release USB flash drive.*

**On your computer:**

- Open the project into which you'd like to merge their data.
- (Network Edition Only) Click **Settings, Switch to Exclusive Access.**
- When the project to be merged in is on a floppy, zip drive or other storage device, insert this device into your computer.
- Select **File, Merge Project.**
- Merge Project** is displayed.
- Select the location of your backup, such as the portable storage device, and select the backup file created on

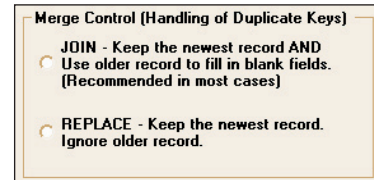


your colleague's computer. Projects that are in uncompressed form appear on the upper right-hand box. Compressed backups appear at lower right. Usually, you'll select a compressed backup for merge.

- Select **Merge Control, Merge Options** and **Log Level** option desired. See details below.

**Merge Control**

When both projects contain some identical names, items or transactions, choose whether to simply retain only the newest copy of those records, or to replace blank fields in the main project with merge data. Unique new names, items and transactions are added to the main project. You must select a Merge Control option before merging. See *Handling Duplicate Merge Records* for more details.

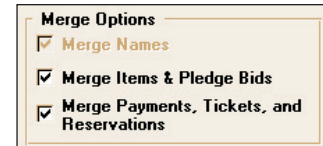


*Tip*

*When merging before your event, choose either Join or Replace, depending on how you and your teammates are entering data. In most cases, Join is a better choice. Replace is retained for compatibility for those familiar with V1/V2 Merge process, which always replaced older records with newer records.*

**Merge Options**

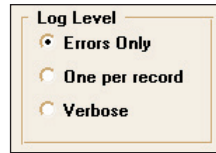
**Auction! V3** gives you precise control over merges. You can merge names, items and/or payments, tickets & reservations. Names must always be merged; Items & Transactions are optional.



The most critical "opt-out" on merge before the event may be for items. When items have been re-numbered since other volunteers received copies of the dataset, Items should NOT be merged. See *Merging Projects in Detail* for more specific information on how Item Merge works.

## Merge Logging

**Auction!** logs specific results as you merge, for your review and analysis when needed. You may elect to see only errors, one line per record, or verbose logs. Verbose logs indicate conditions for every field on every record. Logs are automatically stored as a file and displayed after merging, and may be printed.



## Auto Backup

When you begin **Merge**, **Auction!** automatically creates a compressed backup of your Main project before commencing the record merge. This provides the ability to immediately roll back to prior to Merge if you have unexpected results. Once you've restored from backup, we recommend you set Merge Logging to verbose, and merge again. Then you'll have all the details to review.

### Tip

When you are preparing to merge and **Merge** is disabled, click **Hint**. It identifies what needs to be done to set up merge.

## Handling Duplicate Merge Records

**Auction!** has very specific definitions for duplicate records. When merging projects, you must select a strategy for handling any occurrence of duplicate records.

What's a duplicate record? See **Unique & Duplicate Records**.

**Auction!** looks at the date/time when each individual record was last modified to determine new/old when comparing duplicate records.

Compare these strategies:

Merge Strategy	Definition	Example
Join	Replace blank fields in newest record with non-blank fields from older record.	<p><b>Existing Newer:</b> John Smith, 22 Willow St., Lamar, CO</p> <p><b>Merge Older:</b> John Smith, 391 Main St., Lamar, CO 335-1201</p> <p><b>Result:</b> John Smith, 22 Willow St., Lamar, CO 335-1201</p>
		<p><b>Existing Older:</b> John Smith, 22 Willow St., Lamar, CO</p> <p><b>Merge Newer:</b> John Smith, 391 Main St., Lamar, CO 335-1201</p> <p><b>Result:</b> John Smith, 391 Main St., Lamar, CO 335-1201</p>
Replace	Replace older copy of record with newer copy.	<p><b>Existing Newer:</b> John Smith, 22 Willow St., Lamar, CO 335-1201</p> <p><b>Merge Older:</b> John Smith, 391 Main St., Lamar, CO</p> <p><b>Result:</b> John Smith, 22 Willow St., Lamar, CO 335-1201</p>
		<p><b>Existing Older:</b> John Smith, 22 Willow St., Lamar, CO 335-1201</p> <p><b>Merge Newer:</b> John Smith, 391 Main St., Lamar, CO</p> <p><b>Result:</b> John Smith, 391 Main St., Lamar, CO</p>

### Tip

Review additional Merge record examples in **Merging Projects in Detail**.

**Auction!** creates a log file so you may review the details of your Merge. The default setting is “errors only,” but you may choose much more detailed reporting. Review your log file carefully after merge. You might decide to restore from the automatic backup created before Merge, and merge again with a different strategy.

## Global Values

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Many setup characteristics for a project are “global” values, which are stored in the local dataset on your computer. This means that values, such as project name, fonts, margins, and header/footer prose on invoices, are stored as part of the dataset. **Merge** combines names, items, and transactions from the two datasets, but does not merge or overwrite the global values.

For example, one person names their event **Auction 2005** and another names the event **A Night to Remember 2005**. When the two datasets are merged, each dataset retains its original event name. This means, for instance, when you print **Invoices** at your event, invoices from the two computers could show different event names.

When one person creates a custom header or footer for bidder invoices, the other person retains their default header and footer; invoices from the two computers will have different prose for the headers and footers.

You can ensure these settings are the same on all computers.

1. (Network Edition Only) Click **Settings, Switch to Exclusive Access**.
2. Click **File, Merge** to ensure all **data** has been merged together from your team member’s projects onto the computer with the correct global values.
3. Main computer: Select **File, Maintenance, Backup** on the computer with the project that has the global values you wish to keep. Give this backup to your colleagues, or email it to them.
4. Colleagues’ computers: Select **File, Maintenance, Restore Project from Backup** to all other computers to overwrite their local datasets, updating data records and global values for printing and layout.