Family Tree Maker

How do I merge two files in Family Tree Maker?

You can merge part or all of a file into your current tree. You can merge a tree file from another Family Tree Maker file or import a file from a GEDCOM, PAF, or other file type to merge into your tree. To help differentiate the current/open file and the file that is being merged in, they are referred to as the Host file (current file) and Import file (file being merged in).

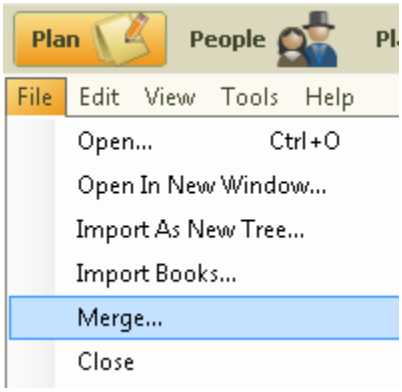
The Merge Wizard uses a formula to determine which people in the two files match, which are new, and which records need your help to resolve the differences in facts. The formula depends on a threshold setting which can be modified in the Merge Wizard.

After the Wizard has matched people and facts, you can go through and specify how the wizard should handle the differences in facts. You can accept all of the Host details, all of the Import File details, or set the details by person or by fact. When you have finished, the Merge Wizard creates and merges all of the records as you specified.

To merge in a Family Tree Maker File

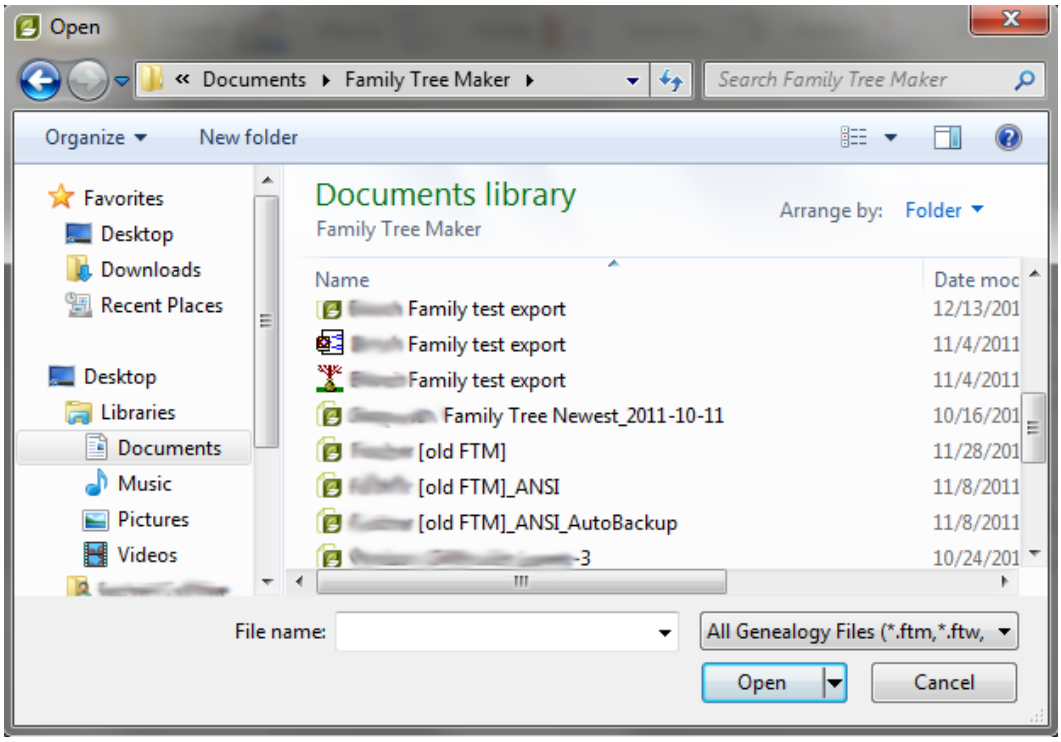
1. Open the host file in Family Tree Maker.

2. Click File then select Merge from the drop-down.

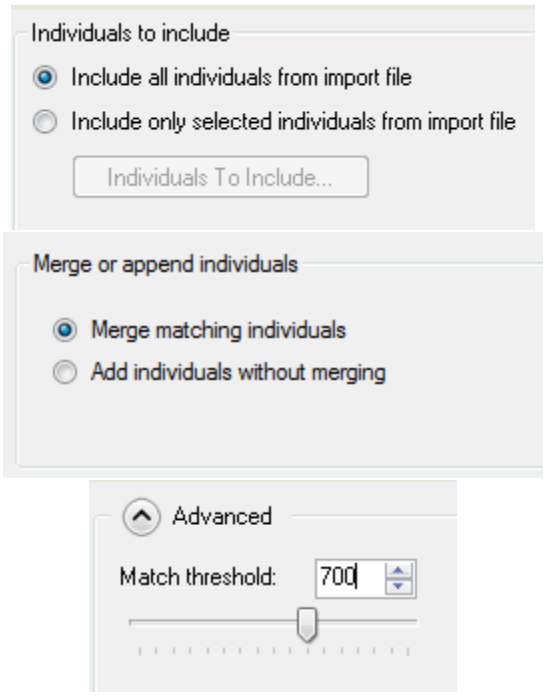


3. The backup dialog box will open. If you want to create a backup copy of the tree, click Yes. If you want to continue without creating a backup, click No.

4. From the Open dialog box, navigate to and select the file you want to merge into your tree, highlight it, and then click Open.

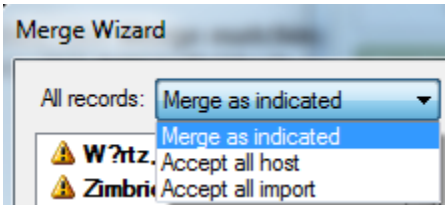


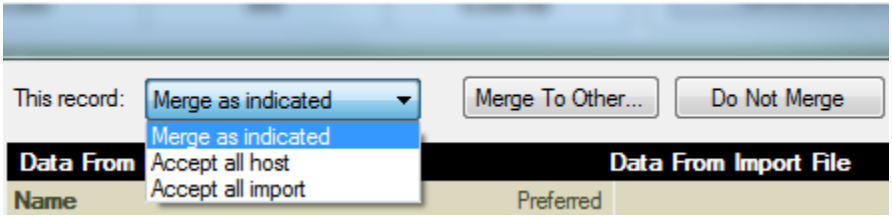
5. The Merge Wizard will open. Select the desired merge options.



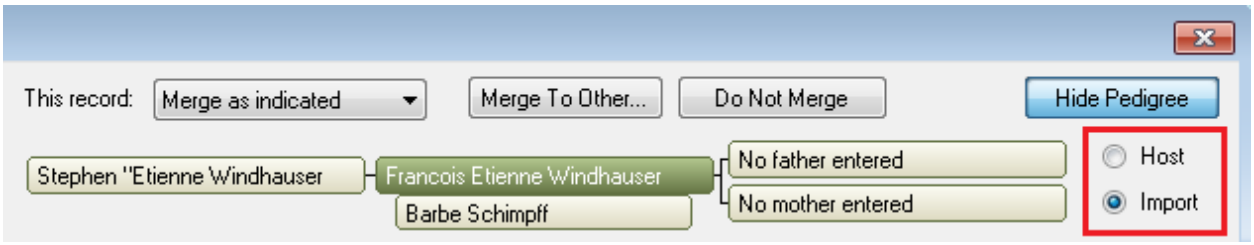
6. Click Next. The Merge Wizard determines which records match, which are new, and which should be flagged as needing to be resolved.

7. You can select to accept all of the Host records as correct, all of the Import File records as correct, or set the facts for each person individually.





8. It can be helpful in the reviewing process to view an individual's immediate family to ensure that you are indeed merging two instances of the same person. You can do this by clicking the View Pedigree button and switching between the host and import view.



9. Review the listed facts for each individual in the For Review list. Click the round button to select a fact as preferred and choose between alternate and discard as appropriate using the drop down menu.

10. You can also review the list of merged and new individuals, which are found lower in the same list as individuals for review.

11. When you've made all the selections you want for the two files you're merging, click Merge. The information will be merged as indicated.

- Select whether you want to merge all of the individuals or want to select which individuals to merge. If you select Include only selected individuals from import file, the Filter Individuals dialog box will open.
- Select whether to match individuals or to append them to the tree. Appending places individuals in your tree file without attaching them to the tree. If you want to link them to the tree in the

future, you will need to attach or combine them manually. See To link two people and To merge two people.

- If you chose to match individuals, click Advanced, then select the Match Threshold you want the Merge Wizard to use.
- Each record is analyzed to determine how well it matches a record in the Host file and assigned a ranking from 0 to 1000. Every record over the threshold that you set will be considered a match and treated as such. The Merge Wizard creates new records for those under the threshold. Setting the threshold high results in more new records. Setting it low results in fewer new records
- Merge as indicated will let you review each individual to ensure their facts are handled appropriately (recommended).
- Accept all host will automatically set all facts from the host file (the file that was open first) as preferred.
- Accept all import will automatically set all facts from the import file (the second file you chose after selecting Merge from the File menu) as preferred. Unless you know for certain that one file contains all your preferred facts, we recommend selecting the default option, Merge as indicated.