



There are 11 steps to complete this task:

1. Open System Management.
2. Select Consolidate People.
3. Search for person to be consolidated.
4. Review contact record and files to be consolidated.
5. Add person to be consolidated to Consolidate list.
6. Locate and select Person to which to consolidate.
7. Confirm record has all updated contact information.
8. Press Consolidate and confirm.
9. Close the Information box.
10. Close Consolidate People.
11. Close System Management.

Standard Guide

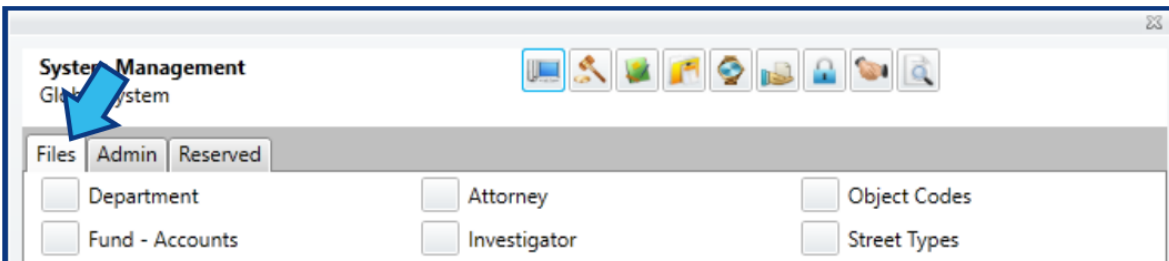
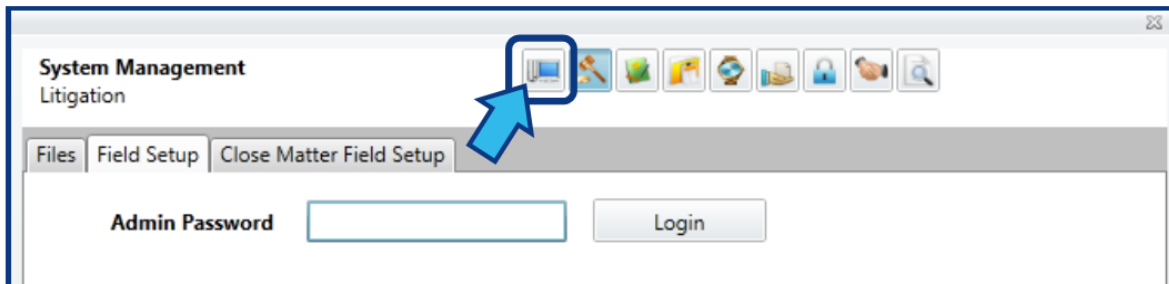
Step 1. Open System Management.

Begin by opening **System Management** by selecting the **System Management** icon from the **Global Toolbar**.

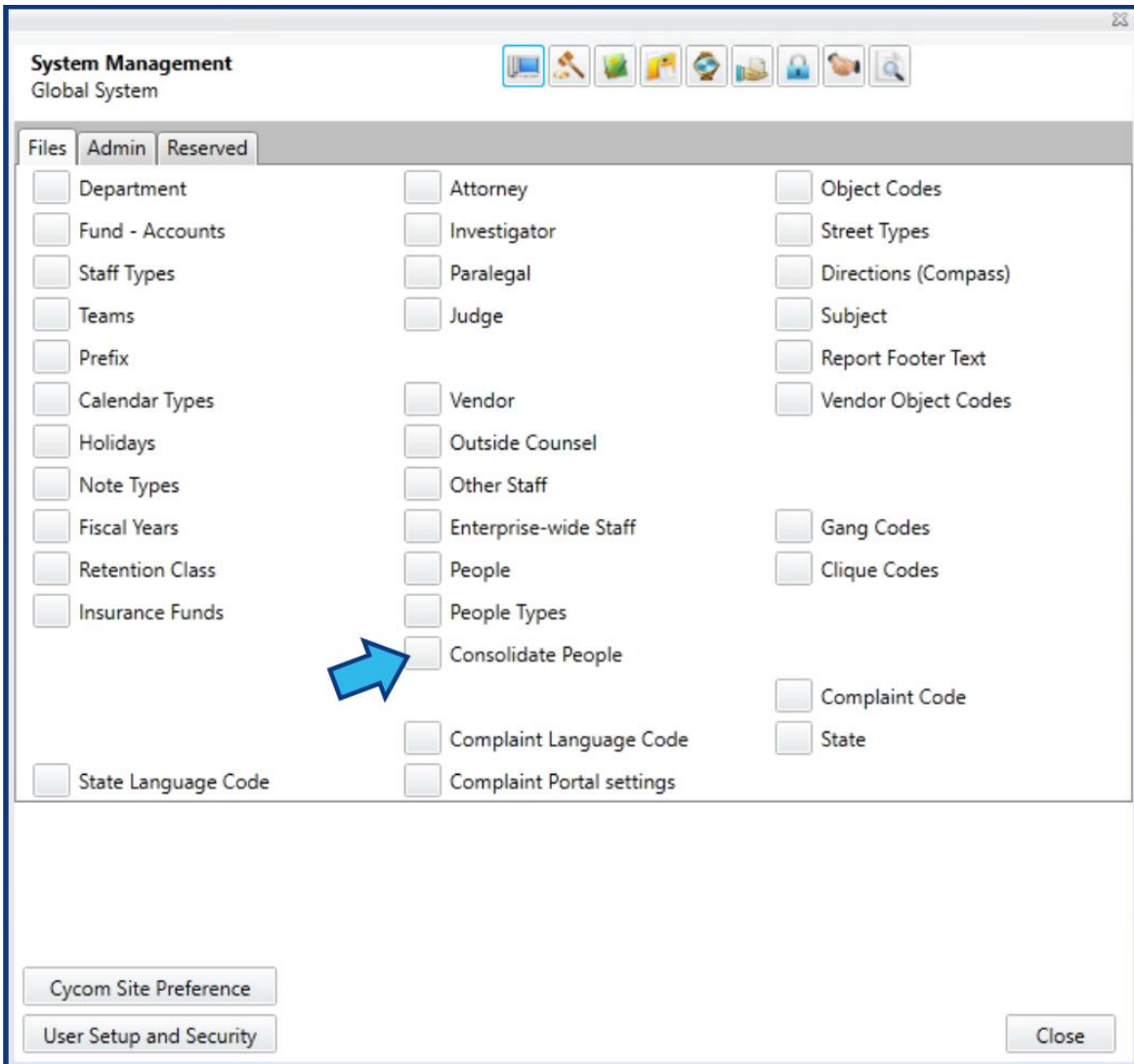


Step 2. Select Consolidate People.

The **Global System Files** tab will be displayed by default. If it is not, navigate to it by selecting the **Global System** icon at the top and then selecting the **Files** tab.



Select **Consolidate People**, located in the center column.



System Management
Global System

Files Admin Reserved

☐ Department	☐ Attorney	☐ Object Codes
☐ Fund - Accounts	☐ Investigator	☐ Street Types
☐ Staff Types	☐ Paralegal	☐ Directions (Compass)
☐ Teams	☐ Judge	☐ Subject
☐ Prefix		☐ Report Footer Text
☐ Calendar Types	☐ Vendor	☐ Vendor Object Codes
☐ Holidays	☐ Outside Counsel	
☐ Note Types	☐ Other Staff	
☐ Fiscal Years	☐ Enterprise-wide Staff	☐ Gang Codes
☐ Retention Class	☐ People	☐ Clique Codes
☐ Insurance Funds	☐ People Types	
	☐ Consolidate People	☐ Complaint Code
	☐ Complaint Language Code	☐ State
☐ State Language Code	☐ Complaint Portal settings	

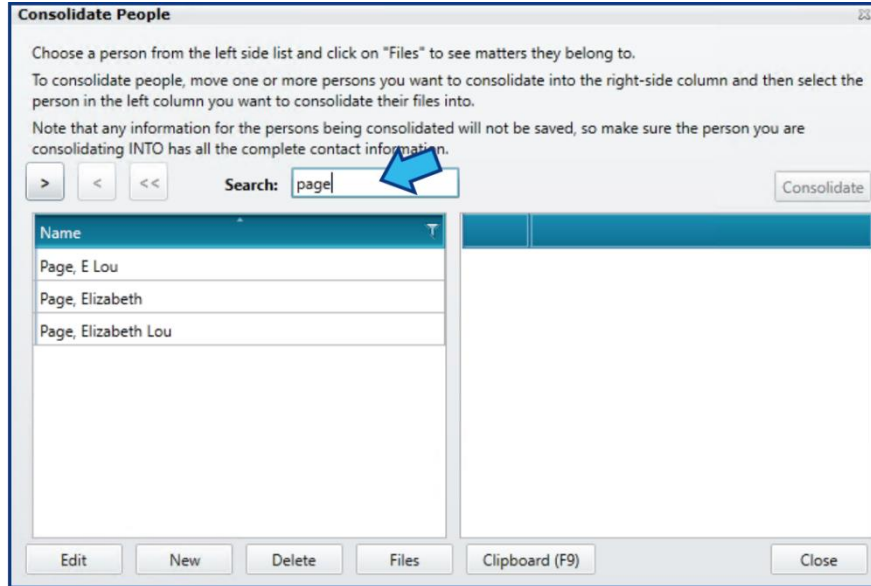
Cycom Site Preference

User Setup and Security

Close

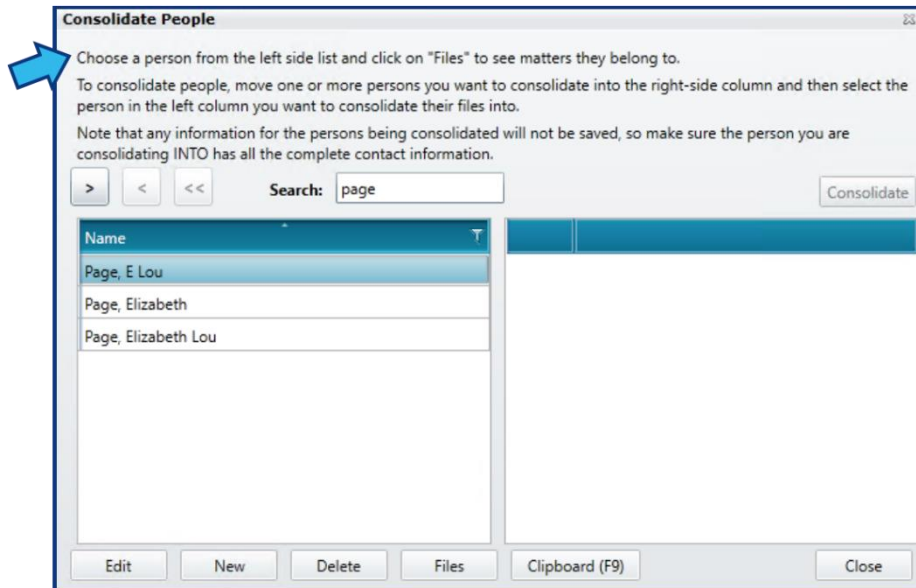
Step 3. Search for person to be consolidated.

Begin typing the name of the person to be consolidated.



The screenshot shows the 'Consolidate People' window. At the top, there are instructions: 'Choose a person from the left side list and click on "Files" to see matters they belong to.', 'To consolidate people, move one or more persons you want to consolidate into the right-side column and then select the person in the left column you want to consolidate their files into.', and 'Note that any information for the persons being consolidated will not be saved, so make sure the person you are consolidating INTO has all the complete contact information.' Below the instructions is a search bar with the text 'page' and a blue arrow pointing to it. To the right of the search bar is a 'Consolidate' button. Below the search bar is a list of names: 'Page, E Lou', 'Page, Elizabeth', and 'Page, Elizabeth Lou'. At the bottom of the window are buttons for 'Edit', 'New', 'Delete', 'Files', 'Clipboard (F9)', and 'Close'.

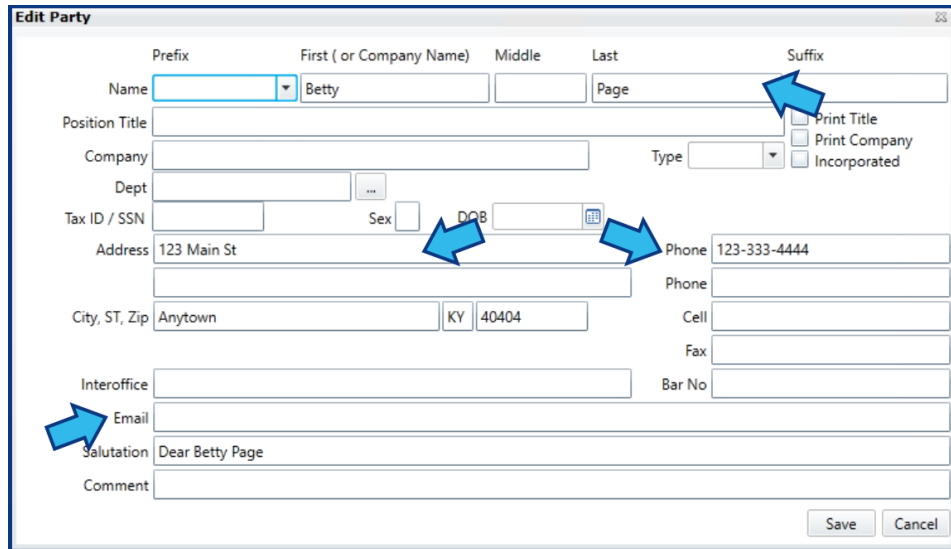
Once located, left-click on the person's name to select them. A selected person will be highlighted in blue. Note the instructions provided at the top of the **Consolidate People** window.



The screenshot shows the 'Consolidate People' window with the same search results. A blue arrow points to the first name in the list, 'Page, E Lou', which is now highlighted in blue. The rest of the window, including the instructions, search bar, and buttons, remains the same.

Step 4. Review contact record and files to be consolidated.

First, while the person is still in the left column, review the person's contact record by selecting **Edit** to open the **Edit Party** window. Once consolidated, all information in this record will be lost if it is not recorded elsewhere. Be sure to record this information to compare with the contact record of the final person to which this person will be consolidated. Once you have finished reviewing the contact record, press **Cancel** to return to the **Consolidate People** window.



Edit Party

Prefix: [] First (or Company Name): Betty Middle: [] Last: Page Suffix: []

Name: [] Position Title: []

Company: [] Type: [] ☐ Print Title ☐ Print Company ☐ Incorporated

Dept: [] Tax ID / SSN: [] Sex: [] DOB: []

Address: 123 Main St Phone: 123-333-4444

City, ST, Zip: Anytown KY 40404 Phone: [] Cell: [] Fax: [] Bar No: []

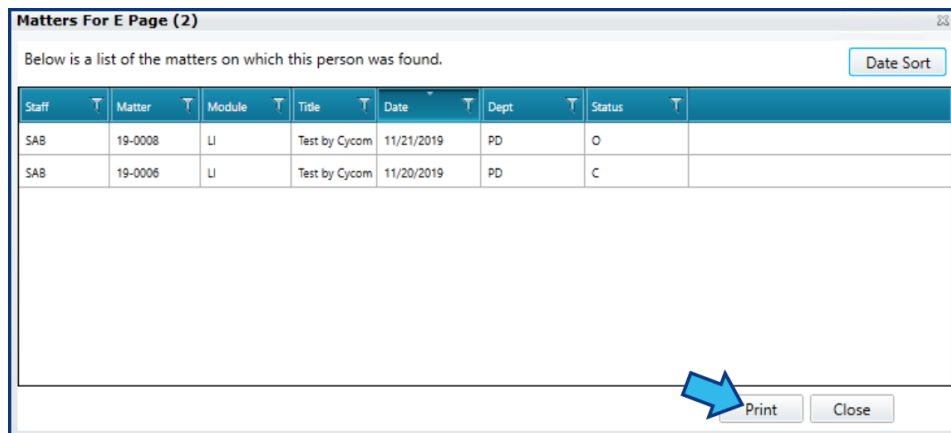
Interoffice: [] Email: []

Salutation: Dear Betty Page

Comment: []

Save Cancel

Next, review any files the person is associated with by selecting **Files**. The list that appears can be printed so you are able to review each file in more detail if necessary. No files will be removed or deleted during the consolidation process. Instead, any associations to persons being consolidated will be edited. Once you have finished reviewing the matters record, press **Close** to return to the **Consolidate People** window.



Matters For E Page (2)

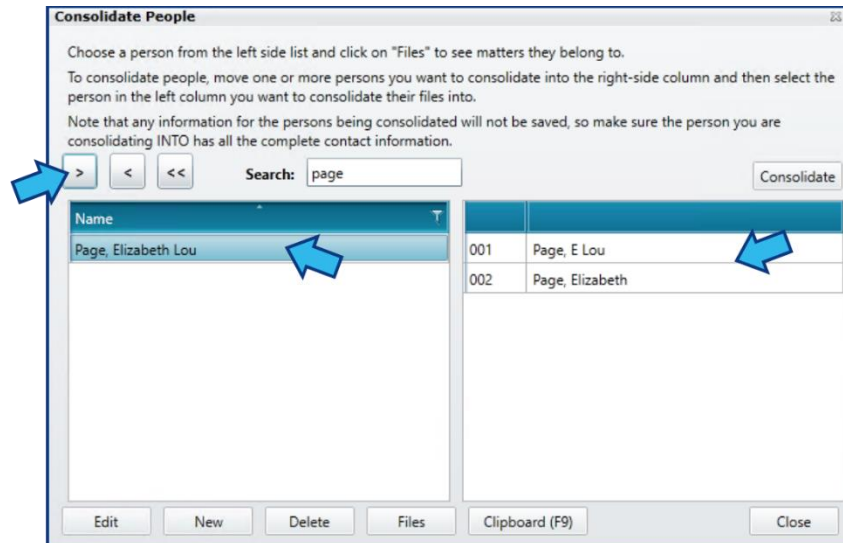
Below is a list of the matters on which this person was found. Date Sort

Staff	Matter	Module	Title	Date	Dept	Status
SAB	19-0008	LI	Test by Cycom	11/21/2019	PD	O
SAB	19-0006	LI	Test by Cycom	11/20/2019	PD	C

Print Close

Step 5. Add person to be consolidated to Consolidate list.

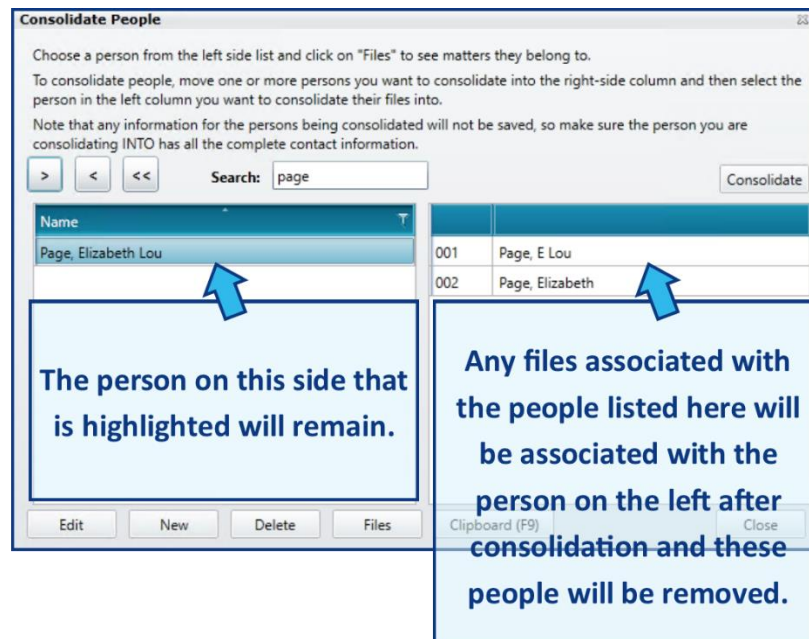
When satisfied the person you have selected should be consolidated with another person, move the person's name to the right column by selecting the right arrow above the left column. The name will disappear from the left column and appear in the right.



Continue **Steps 3** through **5** until all persons to be consolidated are added on the right.

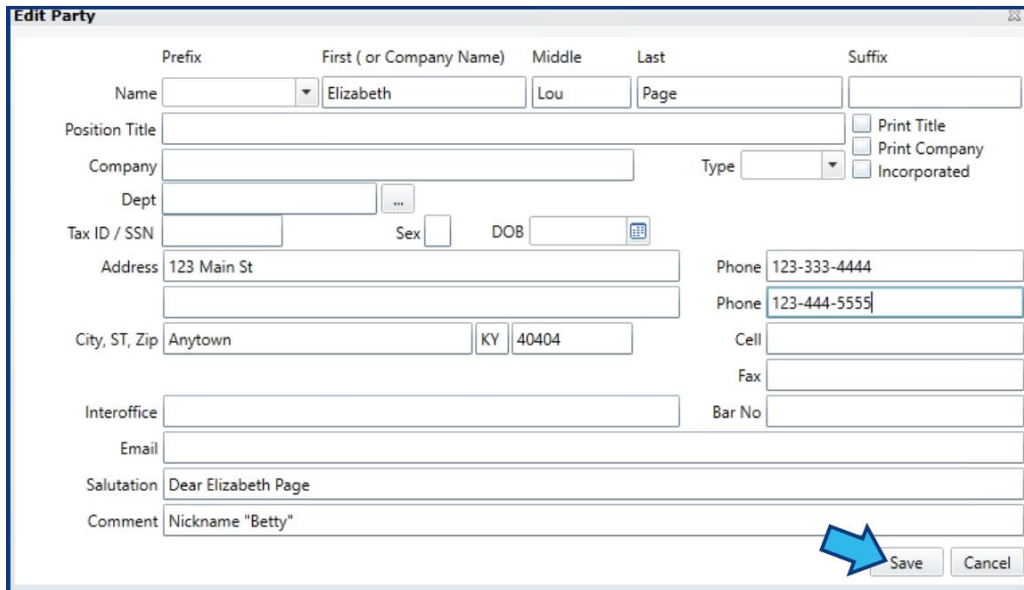
Step 6. Locate and select Person to which to consolidate.

The person to which the others will be consolidated should be chosen last. **DO NOT** move this person to the right column. Do left-click this person so that they are highlighted in blue.



Step 7. Confirm record has all updated contact information.

As with the others, with this person highlighted in the left column of the **Consolidate People** window, select **Edit** and make sure this contact record has all the correct contact information you wish to retain. If you make any changes, be sure to press **Save** at the bottom of the **Edit Party** window.



Edit Party

Prefix First (or Company Name) Middle Last Suffix

Name Elizabeth Lou Page

Position Title

Company Type

Dept

Tax ID / SSN Sex DOB

Address 123 Main St

City, ST, Zip Anytown KY 40404

Phone 123-333-4444

Phone 123-444-5555

Cell

Fax

Bar No

Interoffice

Email

Salutation Dear Elizabeth Page

Comment Nickname "Betty"

You may also wish to review any **Files** associated with this person to confirm this is the same individual, or to make note of the total files before consolidation. To do so, select **Files** in the **Consolidate People** window with this person highlighted in the left column.

Matters For Elizabeth Page (2)

Below is a list of the matters on which this person was found.

Staff	Matter	Module	Title	Date	Dept	Status
SAB	19-0004	LI	test by cycom	11/14/2019	PD	C
MAIL	19-0003	LI	test	11/13/2019	PD	C

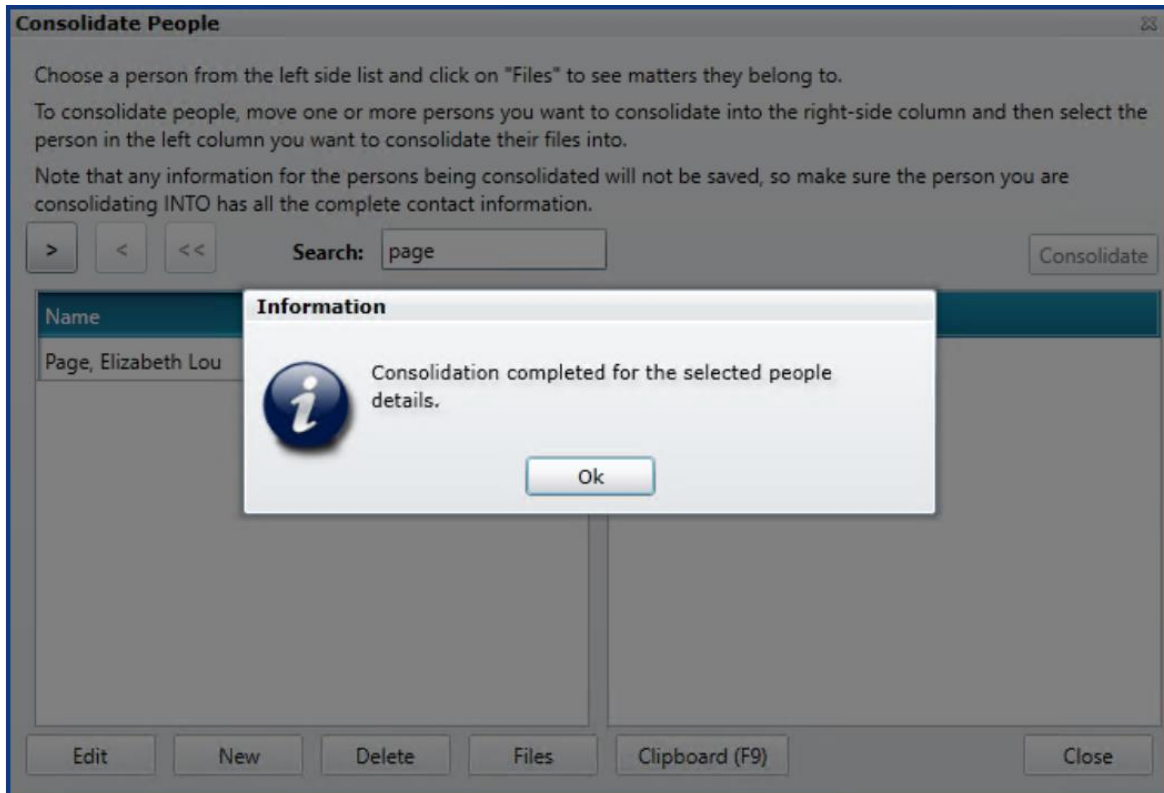
Once you are satisfied that the list of people in the right column should be consolidated into the person highlighted in the left column, press **Consolidate** above the right column.

A confirmation window will appear. Select **Yes** to confirm you wish to continue with the consolidation.

Page 8 of 10

Step 9. Close the Information box.

When the consolidation process is complete, you will be alerted with an **Information** window. Press **Ok** to return to the **Consolidate People** window.



You can confirm the files were successfully associated with the person by selecting **Files**. Press **Close** to return to the **Consolidate People** window.

Matters For Elizabeth Page (4)

Below is a list of the matters on which this person was found. Date Sort

Staff	Matter	Module	Title	Date	Dept	Status	
SAB	19-0006	LI	Test by Cycom	11/20/2019	PD	C	
SAB	19-0004	LI	test by cycom	11/14/2019	PD	C	
SAB	19-0005	LI	test by cycom	11/14/2019	PD	C	
MAIL	19-0003	LI	test	11/13/2019	PD	C	

Print Close

Step 10. Close Consolidate People.

After you have consolidated all the people you wish to consolidate, press **Close** to return to the **System Management** window.

Step 11. Close System Management.

Press **Close** to close **System Management**.