# Merging Data into an Epi Info™ 7 project using Classic Analysis – MERGE command

Even though we recommend using the Data Packager for merging data across multiple Epi Info™ 7 projects, there might be an instance in which you would like to bring data from a different data source, such as MS Excel, into an Epi Info™ 7 project. In this instance, the traditional data merging capabilities of Epi Info™ are still present in the Classic Analysis module by using the MERGE command.

The MERGE command allows users to combine or integrate records in one dataset with those in another, using one or more defined identifiers to establish the match between records. Variable names and variable types **must match** between both sources. Records in the second dataset that do not have matching keys can be appended to the end of a dataset. Records in the second dataset that do have matching keys can be used to update records in the main dataset. For the merge process to be successful, variable names between both data sources should match.

Let's discuss the steps that you will need to complete to merge data, for example, from an Excel spreadsheet into an Epi Info™ 7 project.

1. From the Epi Info™ 7 Main Menu, click on **Classic Analysis**.

2. From the Classic Analysis Command Tree, use the **READ** command to open an Epi Info™ 7 project file (.PRJ). Navigate to the location of the project (Data Source) and select a form within your project (Data Source Explorer).
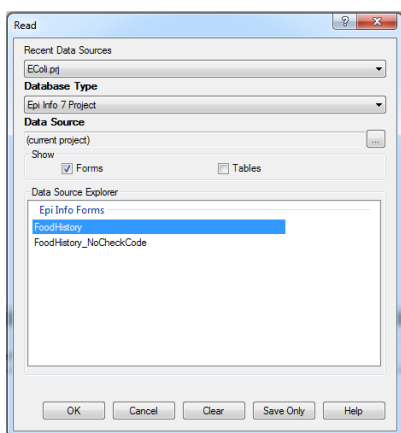
3. Click **Ok**.
4. From the Classic Analysis Command Tree, click **Data > Merge**. The MERGE dialog box opens.

5. From the Data Formats drop-down list, specify the other database type to use. In this example, use MS Excel 97-2003 (xls)

6. In the Data Source field, click the Browse   button. The Open Existing File dialog box opens.

7. Click the Browse button once again and navigate to the location of the MS Excel file.

8. Click **Ok**.

9. The MERGE dialog box populates with available worksheets (Show All tab).
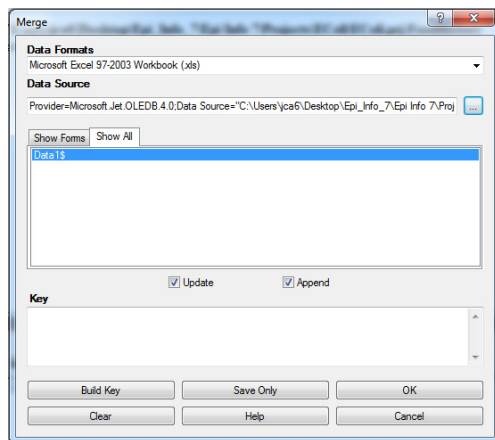
10. Select the desired worksheet. In this case, Data1$. The **Build Key** button activates.

11. Click the **Build Key** button. The **RELATE - BUILD KEY** dialog box opens.

12. From the Available Variables drop-down list in the *Current Data Variables* section, select the current Epi Info 7 project variable for merging the data by clicking on the variable name. There must be a variable in the current project that corresponds to a variable in the Related file (i.e., Patient ID).

13. From the Available Variables drop-down list in the *Related Table Variables* section, select the current variable in the MS Excel file for merging the data by clicking on the variable name.
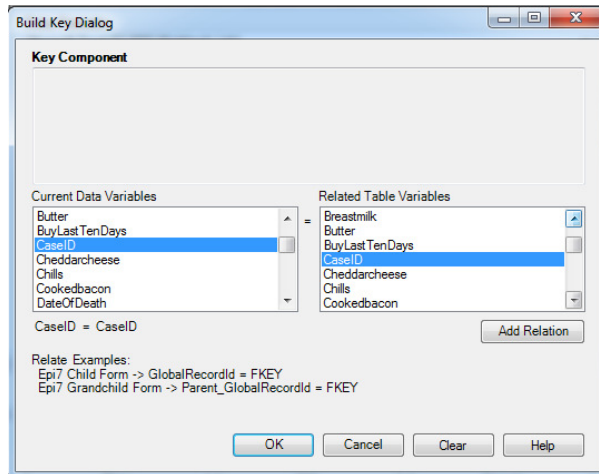
14. Click the **Add Relation** button.

   - Repeat steps 12 through 14 if you are using more than one matching field for the merging process.
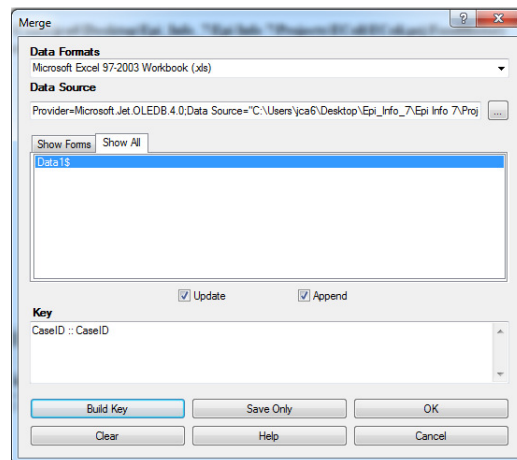
15. Check the *Update* and *Append* selections from the corresponding checkboxes.

16. Click **OK** to accept the Build Key designations.

   - For matching records, Update replaces the value of any field in the READ table whose build key matches the MERGE table.

   - For unmatched records, Append creates a new record in the READ table with values only for those fields that exist in the MERGE table.

   - For most merges, select Update and Append records. If you select both options, records containing the same selected merge variables will be updated (overwritten) if there is new information. All other records will be appended (added) to the end of the data table.

17. From the Merge dialog box, click **OK**.