

# How to Merge Assessment Units in ATTAINS

Version: 4/05/2019

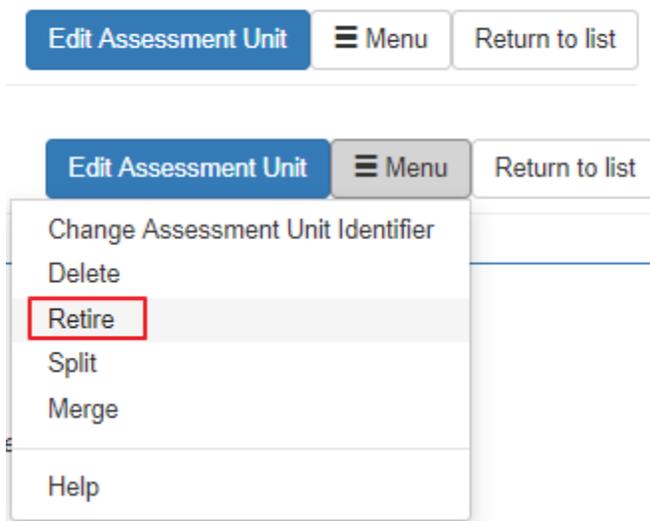
**Purpose:** To explain how to tell ATTAINS that two formerly separate Assessment Units have been combined into one Assessment Unit, for purposes of tracking that change. Size information associated with the Assessment Units must be changed manually. Assessment decisions about the Assessment Units must also be changed manually.

**Access Level Required:** Only state users who are Assessment Unit Administrators may Retire and Merge Assessment Units.

## Merging Assessment Units

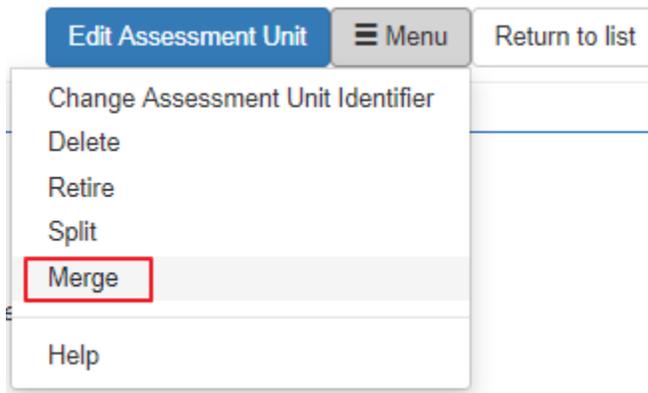
In order to merge two Assessment Units, one of the Assessment Units must first be retired. Determine which Assessment Unit ID will be retained and retire the other Assessment Unit.

1. If both Assessment Units to be combined have a status of "Active", at least one of them needs to be Retired. To retire an Assessment Unit, select the Assessment Unit ID to open the Assessment Unit summary. Under the Menu button, select "Retire". **Note:** Retiring an Assessment Unit is permanent.



2. Once one of the Assessment Units has been retired, select and open the remaining Active Assessment Unit that the retired Assessment Unit will be merged to.

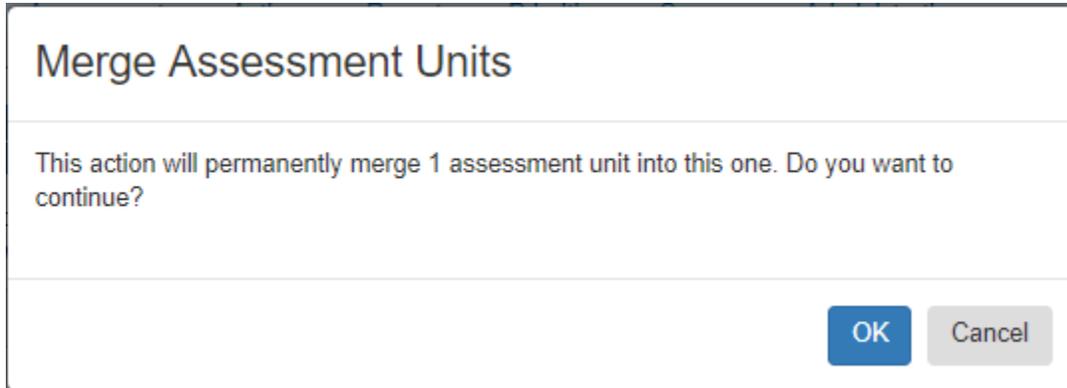
- Under the Menu button, select Merge.



- This opens the Merge Assessment Units screen.
  - The Assessment Unit that was open when you selected “Merge” is listed in the “Source Assessment Unit” field. This is the Assessment Unit that the other Assessment Unit will be merged into.
  - The “Retired Assessment Unit to be Merged” is the Assessment Unit that was retired in preparation of merging it to the open Assessment Unit. This field will only show Assessment Units that have already been retired. You may select more than one Retired Assessment Unit to merge with the current Active Assessment Unit.
  - Click Add to move the retired Assessment Unit(s) into the table on the right.
  - When you have double-checked your selection, choose “Complete Merge” to finish the process.

 A screenshot of the 'Merge Assessment Units' screen. At the top, there is a navigation bar with icons for Home, Assessment Units, Assessments, Actions, Reports, Priorities, Surveys, and Administration. Below this is a blue header bar with the text 'Merge Assessment Units - Example Invented River (PT\_SS\_Training\_2)'. The main content area contains a message: 'You may only select Retired Assessment Units to merge into this Assessment Unit. If you find that the Assessment Units you wish to merge are not available, make sure they have been Retired.' Below the message are two input fields: 'Source Assessment Unit' with the value 'Example Invented River (PT\_SS\_Training\_2)' and 'Retired Assessment Unit to be Merged \*' with the placeholder 'Enter Assessment Unit ID'. To the right of the 'Source Assessment Unit' field are three tabs: 'Assessment Unit ID', 'Assessment Unit Name', and 'Water Type'. At the bottom of the form are two buttons: 'Add →' (highlighted in blue) and 'Cancel'. At the bottom right of the page, there are two buttons: 'Complete Merge' (highlighted in blue) and 'Cancel'.

5. A window will pop-up, reminding you that this is a permanent action. If you want to continue, click "OK".



6. If you reopen the Active Assessment Unit, at the bottom of the screen under Modifications is an entry designating that a merge occurred, the date the Assessment Unit was modified and who implemented the merge.

Modifications

Modification Type	Description	Modified Date	Modified By
Merge	Merged PT_SS_Training into PT_SS_Training_2	2019-03-22	aa_admin

7. Edit the Assessment Unit to update water type sizes to reflect the new combined Assessment Unit size.



- a. Select the appropriate row from the Water Type table, update the size information, and click the "Update" Button.
8. Open the Assessment record for the newly merged Assessment Unit. (Go to the Assessments tab and select the Assessment Unit ID for the remaining active Assessment Unit that received the merge of the retired Assessment Unit). Edit any Assessment decisions that need to be updated based on the merged Assessment Units.