M3 Cataloging Module

BASIC FIND & REPLACE

Uses: Globally edit records to fix spelling errors, upper/lower case etc. – Bibliographic, Holding &Patron records

Example: Make sure all Bibliographic Records contain a Location/Collection Code (852#a), and that it's all uppercase.

1. **Search** - all Bibliographic Records

2. **Results** are displayed below.
    a. Codes that are uppercase, mixed case and one is missing

3. **Select** records you want to change

   Tip: To select multiple records:
    a. **Click** box of the **1ˢᵗ record** you want.
    b. **Scroll down** to **Last record** you want.
    c. **Hold down Shift Key**.
    d. **Click** box of that **last record** you want.

4. **Right click** and select **Find**

5. Initial **Find and Replace Box**

6. Type **exact** text you want to locate in **Find box**

7. Select **MARC field** number in the 1ˢᵗ **In box**

8. Select **subfield** in the 2ⁿᵈ **In box**

9. Type the **exact text w/correct case** you want placed in your field in **Replace with box**

10. Click the **Replace All** button

11. All records that you selected should now have the correct text/case in the field/subfield you specified.

12. To take care of the record with no code see **"Advanced Find & Replace" Ex. 1**

DEFINITIONS: Checkboxes on Right Hand Side:

- **Match whole word only** – Locates exact text typed into the **Find** box, treating your text as a whole word. For example: If you type **cat**, only **cat** occurrences are found, and other words such as **cat**alog and s**cat**ter are ignored. (**Match whole word only** and **Match whole field only** cannot be selected in the same operation.)

- **Match whole field only** – Locates exact text typed in the **Find** box, but only when that text is the entire content of a field.

- **Match case** – Locates exact text typed in the **Find** box, but only if the case matches.

- **Wildcards** – Allows you to apply the truncation asterisk (*) to the beginning and/or end of text typed in the **Find** box, and the wildcard question mark (?) within text in the **Find** box. Wildcard usage broadens your search.

- **Regular expression** – Allows an advanced user to search using regular expression notation rather than plain text. Regular expressions allow you to use a character string that has special meaning when used in a pattern. For example, the string **/eg*/** would find **easy**, **egocentric**, **egg**, and all other words that have zero or more occurrences of the character preceding the asterisk (in this example, **g**). This is only one example of a regular expression search; there are many characters that can be used.

ADVANCED FIND & REPLACE

INITIAL STEPS FOR ANY ADVANCED FIND/REPLACE

1. **Search** for the records you want
2. **Select** your records
3. **Right click**, Select **Find**
4. Click **Advanced Box** (left hand corner)
5. Click the **ACTION BUTTON**
   Dropdown box appears with a list of various options, which are defined below.

Action – Displays a list of options that allows the user to create one or more replace actions. The replace actions are then listed in the **Actions** box. The options buttons are:

Wizard: Leads user through the creation of an action.

Copy matching: Copies the contents of a field or subfield that contains text matching the **Find** box into a user-specified field or subfield.

Copy existing: Copies the contents of an existing user-specified field or subfield into a different user-specified field or subfield.

Move matching: Moves (changes the position of) a field or subfield containing text that matches the **Find** box.

Move existing: Moves (changes the position of) an existing user-specified field or subfield.

Rename matching: Renames a matching field or subfield.

Rename existing: Renames an existing user-specified field or subfield.

Remove matching: Removes a matching field or subfield.

Remove existing: Removes an existing user-specified field or subfield.

Insert new: Inserts a new control field, field, or subfield.
Insert text: Inserts text into an existing control field, existing subfield, or indicator.
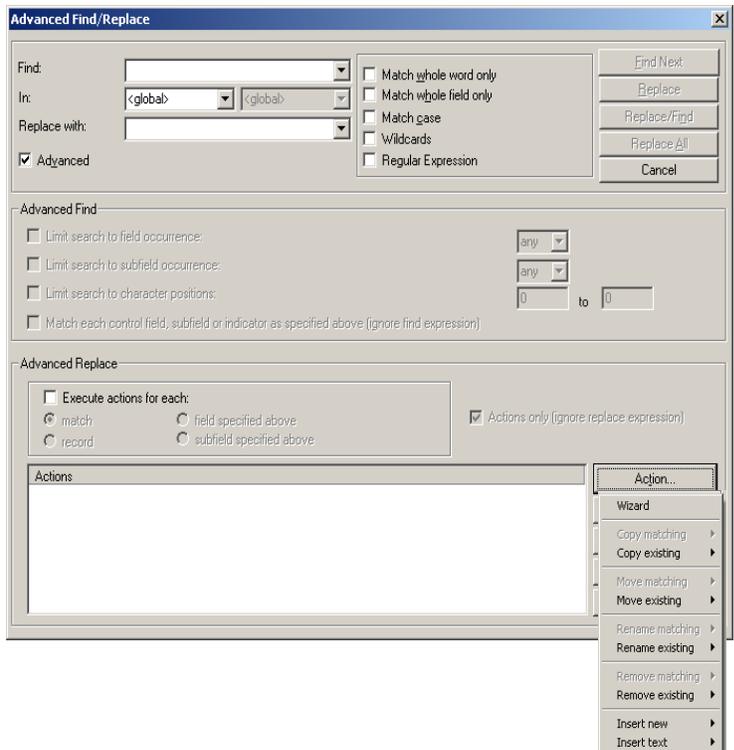
The most frequently used: **Insert new & Insert text**

DEFINITIONS: Buttons on Right Hand Side of ACTIONS WINDOW:

Move Up – Moves the currently-selected action in the **Actions** box up one position.

Move Down – Moves the currently-selected action in the **Actions** box down one position.

Delete – Removes the currently selected action in the **Actions** box.

Delete All – Removes all actions in the **Actions** box.

NOTES:
- ***To cancel the find and replace operation,*** click **Cancel** any time. However, changes made prior to clicking **Cancel** are saved.
- ***To "undo" the changes,*** click **Undo Find/Replace** on the **Edit** menu.
  You **CANNOT UNDO** once you have:

a. opened a record	b. saved a record	c. begun a standard keyword search
d. begun another find operation	e. imported or exported records	f. exited Cataloging

Example 1: *Insert NEW Subfield "a" into EXISTING Field "852"* and place text in New Subfield **"CHBE".**

1. **Click** the **ACTION BUTTON**
2. **Action** = *Insert New → Subfield → Into Existing Field*
3. **Follow screens** *for entering Subfield then Field then Text* – see below
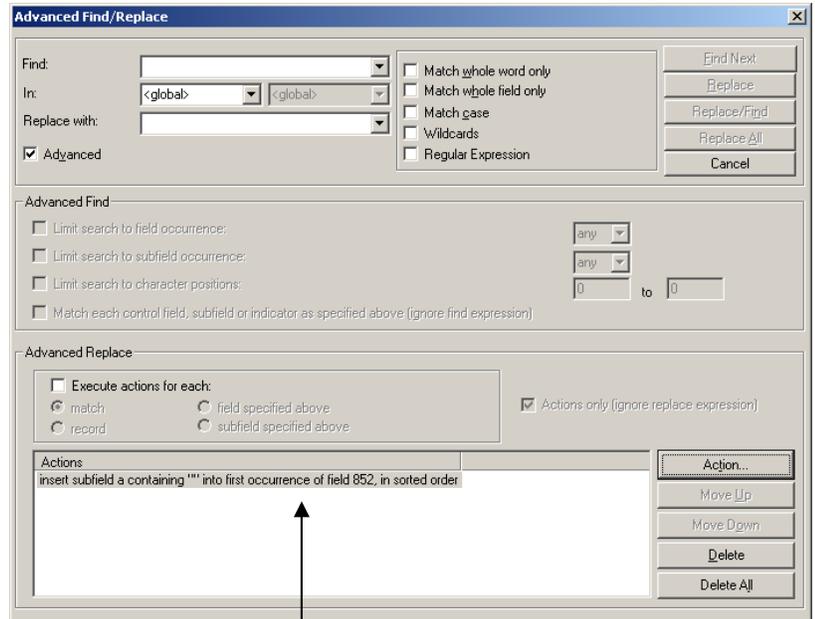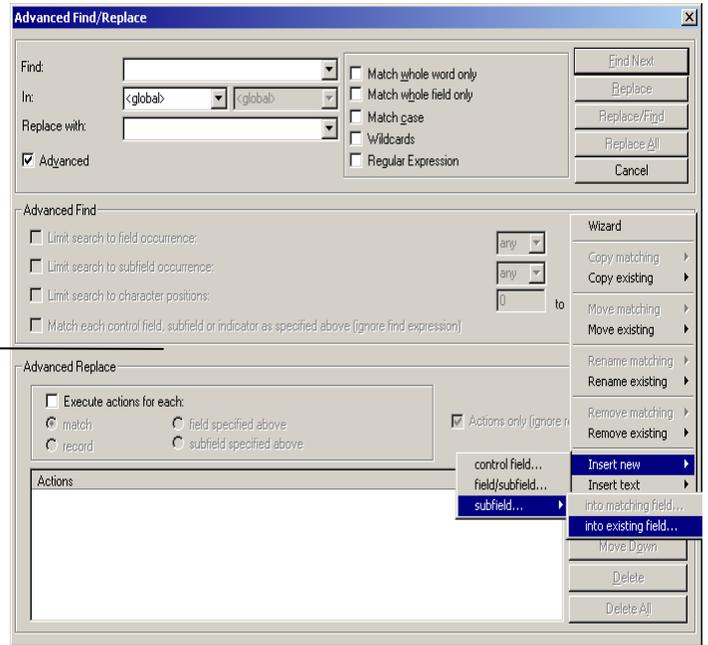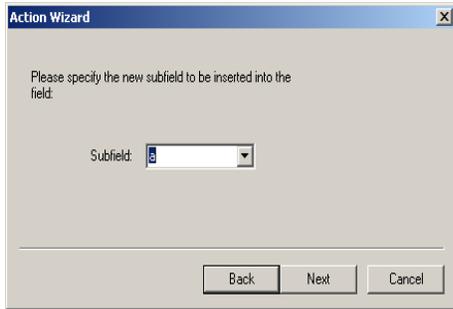
1. Double Check your instruction statement
2. Click **EXECUTE ACTIONS FOR EACH** box.
3. Click **REPLACE ALL** button (upper right hand side)

Example 2: **Prices** in **852#9** field have **"$"** instead of **"p"** and no **"usd"** after the dollar amount

              (We'll combine 2 Find/Replace statements to fix this)

1. **Click** the **ACTION BUTTON**
2. **Action** = *Insert Text → Into Existing Field/Subfield*
3. **Follow screens** for *entering Text* – see below
4. **Double Check** your Action Statements.

1st Find/Replace gets rid of "**$**" and puts in "**p**"

Click Action button, begin 2nd Find/Replace statement.

2nd Find/Replace puts "**usd**" at the end.
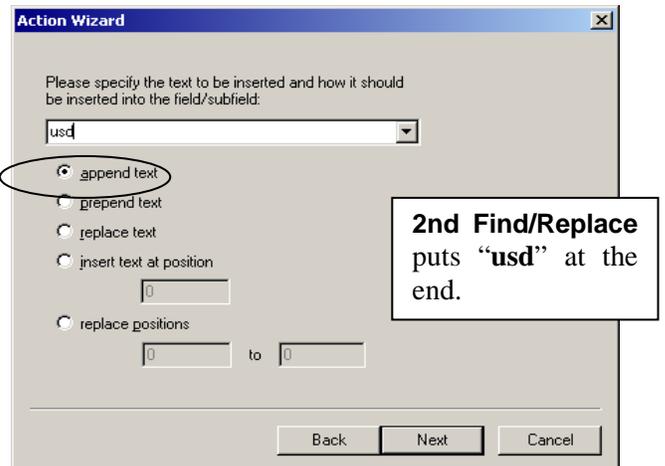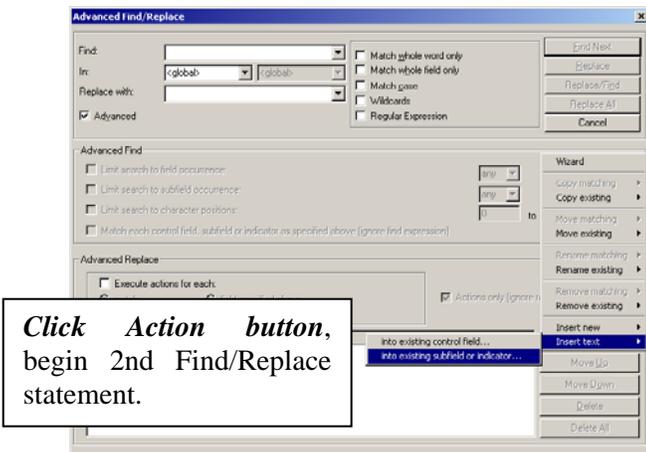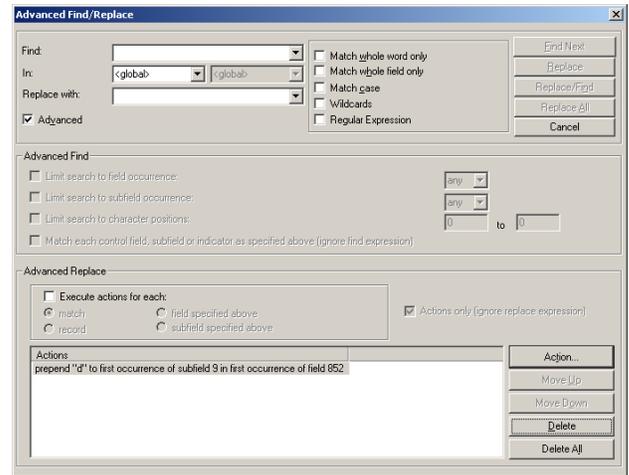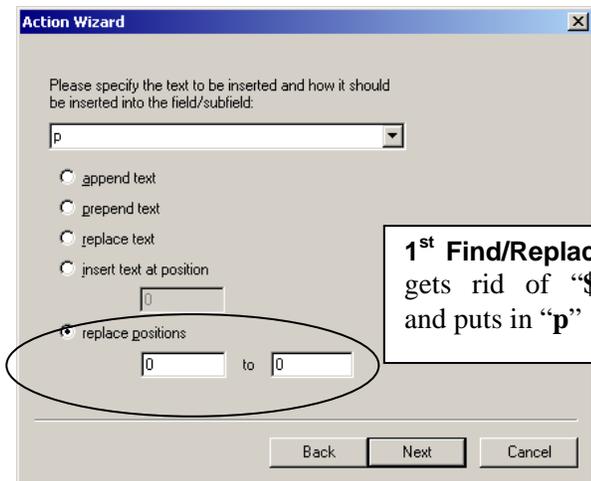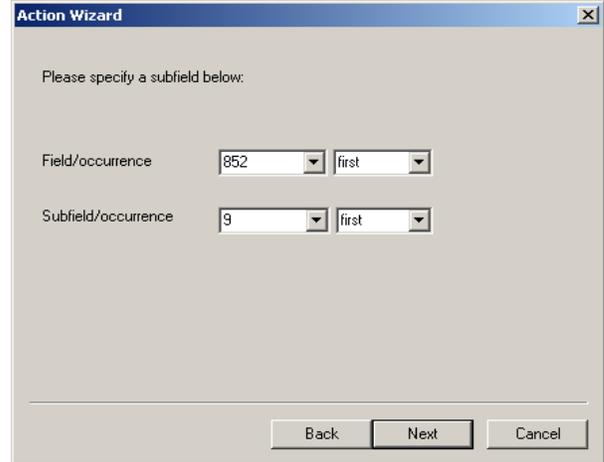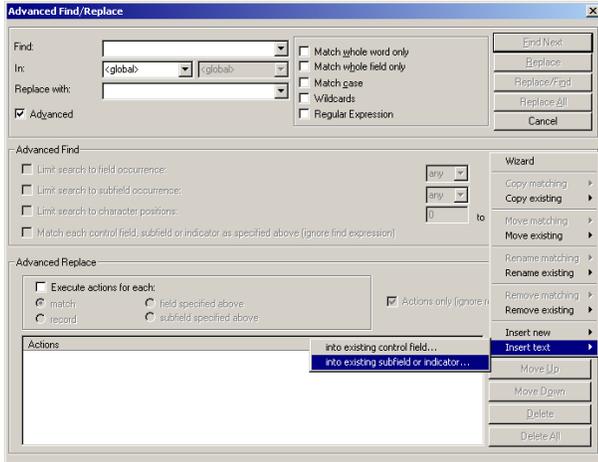
COMMON USES FOR ADVANCE FIND & REPLACE:

Patron Records

TEACHER OR HOMEROOM: Insert Subfield **(b or c)** in **852** Field, type entry in text box for group of students

VIDEO PERMISSION: Insert Subfield **(k)** in **852** Field and type "NO" as default entry in text box

To "reset" this at the beginning of the year, you would:

1. Search For - Patrons / 852#k / Type "Yes" in the Keyword Box
2. Right Click – Select All
3. Right Click – Find

> Find: Yes
> In: 852   k
> Replace With: No

Holding Records

PRICE FIELD: Insert Subfield **(9)** in **852** Field and type "p10.88usd" as default entry on books that have no price

LOCATION CODE: Insert Subfield **(a)** in **852** Field and type SchoolCode as default entry in text box

PREFIX: Insert Subfield **(k)** in **852** Field and type your Prefix as default entry in text box

Bibliographic Records

SUBJECT FIELD FOR A GROUP OF RECORDS: Insert Field **(650)** Subfield **(a)** in **852** Field

LOCATION CODE: Insert Subfield **(a)** in **852** Field and type SchoolCode as default entry in text box

MATERIAL TYPE CODE: Insert Text into existing **control** field:

Material Type	Field	Letter to Type	Position Boxes	
DVD	**001**	**v**	**4**	**4**
Kit	**000**	**o**	**6**	**6**
Mixed Material	**000**	**p**	**6**	**6**
Audio Book	**000**	**i**	**6**	**6**