

## Introduction

The Global Change facility in Heritage IV allows a word or phrase to be replaced with another word or phrase in any of the Heritage data files. For example, you can use Global Change to move all pupils in year 7 tutor groups to year 8 without having to edit the individual Reader Records; you can change the loan type of a group of books from normal loan to short loan without having to change the loan type on each individual Accession Record and so on.

Heritage IV gives you the facility to set up a Global Change and save the template so you can run the same Global Change more than once. This is particularly useful for such changes as moving readers up a year as it is likely that you will want to perform the same changes each year. You can also set up a Global Change template to make more than one type of change at a time which is useful if you need to make many similar changes.

*Global Change cannot be used to change the ID of a record, for example, the Standard Number of a Catalogue record or the Accession Number of an Accession record.*

*The global change form is a very flexible but powerful tool. IS Oxford strongly advise that you take a back up of your library data before using the global change form, to ensure that any mistakes are not permanent and can be recovered. Restoring a back up is usually the only way to recover from mistakes.*

## The Global Change Form

1. Go to **Management Menu, Tools Menu** and select **Global Change**. See *fig.1* (below).
2. **ID** -Enter a short ID that will assist you in recognising the Global Change definition in future. For example, TC for tutor change or KEY for editing keywords.
3. **Description** - Enter a Description of the Global Change. For example Updating Tutors or Editing Keywords
4. **File Name** - Click on the arrow to the right of the field to select from the list of file names. For changes to the catalogue records select MAIN\_CAT, for changes to reader records select READER and for

changes to the accession records select **ACCESSION**.

5. The **Saved List Name** and **Criteria** fields in the **Selection** panel give you the opportunity to make a detailed selection of records that you would like to be included in the Global Change, however it is not always necessary to enter a selection criteria. For example in *fig.1* every accession with the loan type code O (One Week Loan) will be changed to SL (Short Loan). Please see the section on **Selection of Records** on page 4 of this helpsheet for information on how to use the selection criteria.

*fig.1*

### The Global Change Form - The Change Command

There are five fields to be filled in to complete the change command; **Match**, **Search Text**, **Replace**, **Replace Text** and **Field Name**. Please see below for a detailed explanation of each field.

*fig.2*

## Match

The **Match** field is used to determine how Heritage should select which records are to be changed. There are five options to select from here; Starts, Ends, Equals, Contains, Every:

Use *Starts* to make changes if the field starts with the **Search Text**.

Use *Ends* to make changes if the field ends with the **Search Text**.

Use *Equals* to make changes if the field exactly matches the **Search Text**.

Use *Contains* to make changes if the **Search Text** is found anywhere in the specified field.

Use *Every* to make changes whatever the contents of the specified field. When you use Every the **Search Text** field is not available to be filled in.

## Search Text

The **Search Text** should contain the text which you intend to search and change.

*This field is case sensitive.*

Enter the text as it appears in the field i.e. in the correct upper, lower or mixed case. For example, entering the location code in lowercase (**main**) would find no hits as codes are always entered in uppercase (**M**).

## Replace

The **Replace** field is used to tell Heritage how to determine the changes required. There are five options to select from here; Search text, Whole Value, Append, With field, Add field:

Use *Search text* to limit the changes to text entered in the **Search Text** field. For example, in *fig.2* (page 2) a keyword of **Enviromental Law** will be changed to **Environmental Law** and a keyword of **Home Enviroment** will be changed to **Home Environment**.

Use *Whole value* to replace the whole search field with the **Replace Text**. For example, in *fig.2* any keyword beginning **Audio** will be changed to **Audiovisual Material** whatever the rest of the keyword entry.

Use *Append* to add the **Replace Text** to the end of the field. For example, in *Fig.2* any keyword of **Science Fiction** will be changed to **Science Fiction and Fantasy**.

Use *With field* to copy the contents of the **Replace Text** field into field specified by the **Search Text**. For example, in *fig.2* any keyword ending **Fic** will be replaced with the contents of the **Classmark** field of that catalogue record whatever the rest of the keyword entry. The field specified in the **Replace Text** field will remain the same.

Use *Add field* to add a new entry to a list of fields, for example, to add a new subject to the selected records. For example, in *fig.3* the Subject of **EARTH SCIENCES** will be added to the selected records.

## Replace Text

Into the **Replace Text** field enter the text with which you wish to replace the original text. This field is case sensitive.

## Field Name

The **Field Name** field is used to determine in which field is the data that you wish to change. Enter the name of the field in which the data in the **Search Text** occurs. Click on the arrow to the right of the field to select from the list of available fields.

Once you have entered all the fields in the **Change Command** area and you are satisfied that the commands are correct click on the **Process** button to begin the Global Change. Heritage will ask if you have an up to date back up. If you are unsure, click on **No** and the Global Change will not be processed. If you do have an up to date back up, click on **Yes** and the specified Global Change will be completed.

Click on **Save** if you wish to retain this global change for future use.

*Please ensure that you do have an up to date backup of your Heritage data before you perform any Global Change.*

## Selection of Records

The Change Command will always perform a global change in the specified file, i.e. it will change every occurrence of the Search text with the Replace text. For example, in *fig.1* (page 2) every loan type previously using the code **O** (One Week Loan) in the ACCESSION file will be changed to **SL** (Short Loan).

However, there are times when you may not want to change every occurrence of a word but only the occurrence in a selection of records. You can use the **Selection** panel of the Global Change form to make specific selection of records.

For example, the **Subject** field on the Catalogue Record can be linked to the **Class** entry for new catalogue records and a frequent request following the creation of new Subjects is to add the Subject to existing records. It is possible to globally add a new line to the list of Subjects with the required entry. For example, in *fig.3* (page 5) all the catalogue records with a classmark starting **551** and with no entry in the list of subjects containing **EARTH** will be selected. Then all the selected records will have the Subject of **EARTH SCIENCES** added to them.

*Using the change command without a selection criteria would add the new Subject to all Catalogue Records.*

Global Change - [Adding Subjects]

ID: SUB Description: Adding Subjects File name: MAIN\_CAT

**Selection**

Saved list name:  Make a list...

**Criteria** (2)

Type	Field	Comparator	Value(s)	And/Or
With	CLASS1	Starting	551	And
Without	SUBJECTS	Containing	EARTH	

**Match** (1)

Match	Search text	Replace	Replace text	Field name
Every		Add field	EARTH SCIENCES	SUBJECTS

Last run by System administrator (05 May 2000 11:50)

**We strongly advise you to make a backup of your data before proceeding. Incorrect use of this form can seriously damage your data!**

Process

fig.3

## Selection of Records – Criteria Fields

The **Criteria** section of the Global Change form allows you to specify which records will be subject to the change command. If this section is left empty then all records will be selected and changed.

There are four fields to be filled in; **Type**, **Field**, **Comparator**, **Value(s)**. Please see below for a detailed explanation of each field.

### Type

The **Type** field is used to specify how Heritage applies the selection criteria. There are four options to select from here; With, Without, With Every, Without Every:

Use *With* to select records which match the selection criteria. This could include records where just one entry on a multi-value field matches the selection criteria, for example, a location of one copy or one of the keywords.

Use *Without* to select records which do not match the selection criteria. For fields with multi-valued entries, none of the entries must match the selection criteria.

Use *With Every* to select records where every entry in a multi-valued field matches the selection criteria. For example, if you want to select catalogue records where every copy has the same loan type, and not select catalogue records which have copies with various different loan types.

Use *Without Every* to select records where every entry in a multi-valued field does not match the selection criteria.

### Field

Enter the name of the field that you wish to use for the selection criteria into the **Field** field. You can click on the arrow to the right of the box to select from the list of fields available.

## Comparator

The **Comparator** field is used to specify how the records are going to be selected. There are 10 options here; Equal, Not equal, Greater than (after), Greater than or equal, Less than (before), Less than or equal, Starting, Ending, Containing, Between:

Use *Equal* to select records which exactly match the value in the **Value** field.

Use *Not equal* to select records which do not exactly match the value in the **Value** field.

Use *Greater than (after)* to select records which have a value greater than that shown in the **Value** field.

Use *Greater than or equal* to select records which have a value greater than or equal to that shown in the **Value** field.

Use *Less than (before)* to select records which have a value less than that shown in the **Value** field.

Use *Less than or equal* to select records which have a value less than or equal to that shown in the **Value** field.

Use *Starting* to select records which have an entry starting with the value entered in the **Value** field.

Use *Ending* to select records which have an entry ending with the value entered in the **Value** field.

Use *Containing* to select records which contain somewhere in the specified field the value entered in the **Value** field.

Use *Between* to select records which have values between those specified in the **Value** field.

## Value(s)

Enter the value i.e. term that you want to select by in the **Value** field.

If you would like to use multiple selection criteria this is possible using the **And/Or** field and adding more than one line of selection criteria.

## Selection of Records - Saved List Name

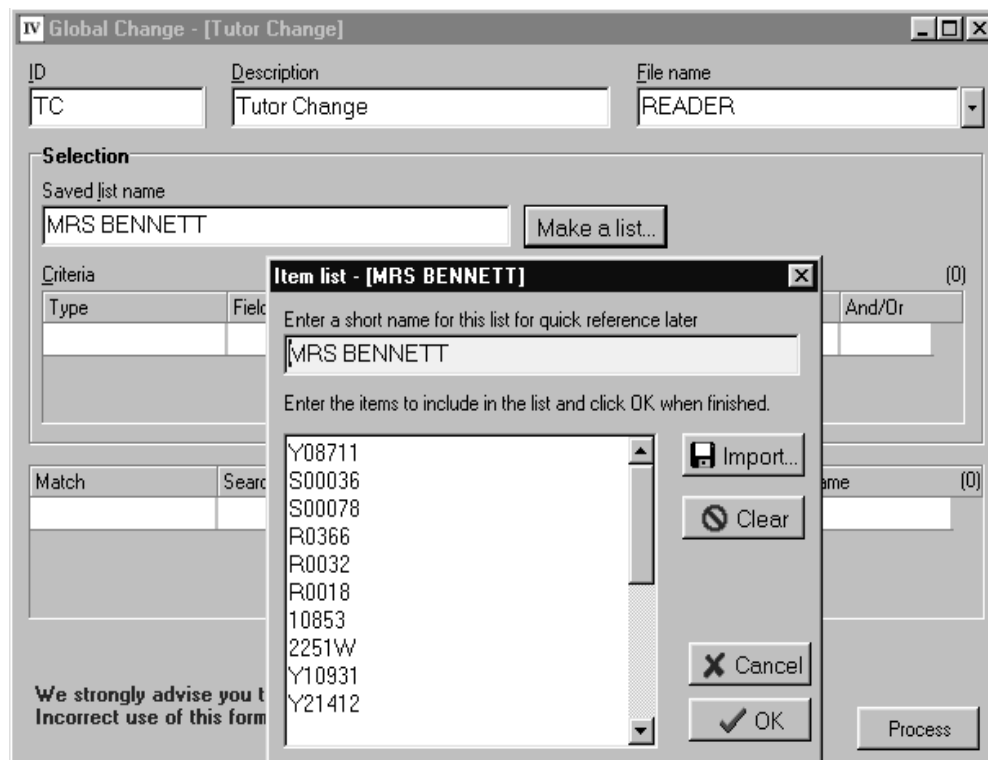
Sometimes it is not possible to enter a selection criterion to select the records you wish to edit globally. However the **Saved List Name** function allows you to globally edit a group of records when you cannot enter an appropriate selection criterion.

1. Click on the **Make a List** button to create the list of records you wish to edit. This will open the **Item list**. See *fig.4* (page 7).
2. Into the field labelled '**Enter a short name for this list for quick reference later**' put a name for the list which will help you to recognise it in the future.
3. Into the field labelled '**Enter the items to include in the list and click OK when finished**' enter the IDs of the records that you wish to edit. Press **Return** after each ID to add the next ID on a new line. This

could be a list of ISBNs or Accession numbers or, as in *fig.4* Reader ID codes.

4. Alternatively you can click on the **Import** button to import a list of IDs that you have already created. For example, a list of Reader ID codes could be produced using fields within a student management system (e.g. SIMS) if those fields are not used in Heritage.
5. Click on **OK** when you have added all the IDs.

Once you have filled in the **Selection** panel you will then need to fill in the Change Command fields before processing the Global Change.



*fig.4*

### Using the Global Change Form to Move Readers Up a Year

One of the most common requests regarding Global Change is to use it to move readers up a year at the beginning or end on the academic year. Please refer to Heritage Helpsheet HM6 for detailed instructions on how to globally change reader records to move readers up a year.

### Globally Editing Dates

When globally changing dates it is important the dates are entered in the correct format. The date must be entered as Day Month Year but it can be abbreviated.

For example, in *fig.5* (page 8) the **Value** of 30 6 00 will select all the reader records with an expiry date before 30<sup>th</sup> June 2000. Then these expiry dates will be replaced with the **Replace text** of 1 8 00. Therefore all the reader records with the expiry date before 30<sup>th</sup> June 2000 will be changed to have the expiry date 01 Aug 2000.

Global Change - [Expiry Date]

ID: EXP    Description: Expiry Date    File name: READER

**Selection**

Saved list name:     Make a list...

Type	Field	Comparator	Value(s)	And/Or
With	EXPIRYDATE	Less than or equal	30 6 00	

(1)

Match	Search text	Replace	Replace text	Field name
Every		Whole value	1 8 00	EXPIRYDATE

(0)

Last run by System administrator (05 May 2000 11:09)

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Process

fig.5

**Additional Examples**

Please see below for some additional examples of Global Changes.

The Global Change in fig.6 will select all pupils i.e. all the readers with the reader category P. Then it will globally enter the expiry date of 31<sup>st</sup> July 2001 on all of these selected reader records who do not currently have an expiry date i.e. their expiry date field was blank.

Global Change - [Changing Expiry Dates]

ID: EXPIRYDATE    Description: Changing Expiry Dates    File name: READER

**Selection**

Saved list name:     Make a list...

Type	Field	Comparator	Value(s)	And/Or
With	RCC	Equal	P	

(1)

Match	Search text	Replace	Replace text	Field name
Equals		Search text	31 07 2001	EXPIRYDATE

(1)

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Process

fig.6

The Global Change in fig. 7 (page 9) will select all readers who belong to the sixth form i.e. those readers whose course field starts with a 12 e.g 12LK, 12GS. It will then change their reader category from whatever it is at the moment to Sixth Former i.e. Reader Category Code SIX.

Global Change - [Changing Reader Categories]

ID: CATEGORIES    Description: Changing Reader Categories    File name: READER

**Selection**

Saved list name:    

Type	Field	Comparator	Value(s)	And/Or
With	COURSE	Starting	12	

(0)

Match	Search text	Replace	Replace text	Field name
Every		Whole value	Six	RCC

(0)

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fig.7

*Whenever you change fields such as reader category, accession location, loantype or status you must be sure to change the **code** and not the description. For example, a loantype of Short Loan might have the loantype code of S, and it is this code, not the description that is stored in the Accession record. Therefore the field you need to change is LNT and not Loantype.*

*If you have any questions or queries regarding the Global Change facility please contact Heritage Technical Support before you attempt a Global Change.*