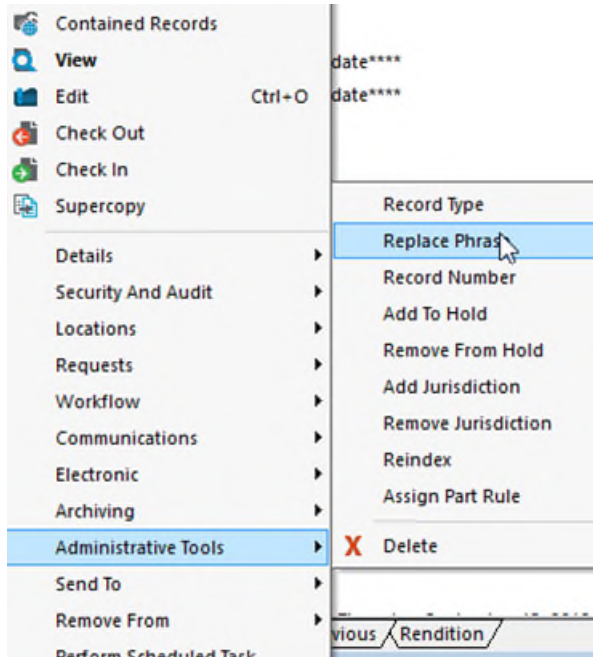


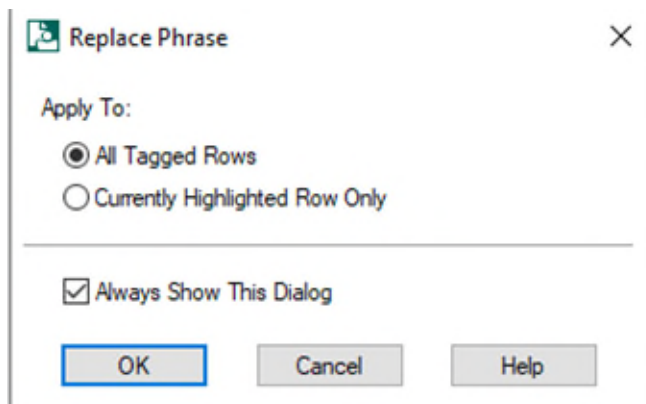
Note: Only Agency Trainers have this functionality.

Use this process if you already applied Notes, and need to edit them in bulk, for example as a Global Search and Replace. It can be useful across a group of documents.

Tag the records you wish to edit > right click > Administrative Tools > Replace Phrase



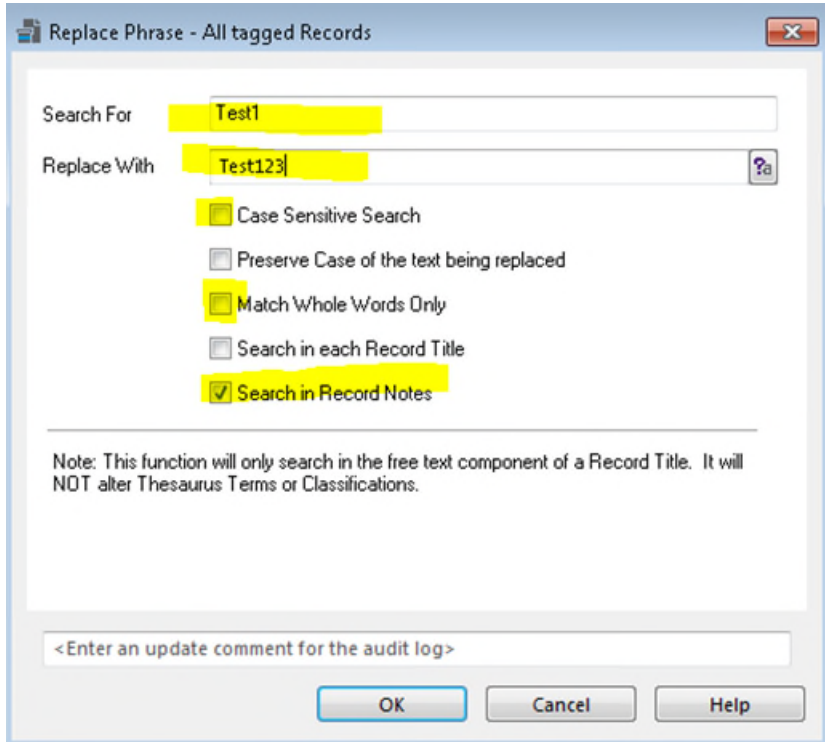
Apply to All Tagged Rows, click OK.



In the “Search For” box: type the current phrase/notes you wish to replace

In the “Replace With” box: type the new phrase/notes.

- **Uncheck** “Search for Each Record Title”
- **Check** the option “Search in Record Notes”



Replace Phrase - All tagged Records

Search For: Test1

Replace With: Test123

☐ Case Sensitive Search

☐ Preserve Case of the text being replaced

☒ Match Whole Words Only

☐ Search in each Record Title

☒ Search in Record Notes

Note: This function will only search in the free text component of a Record Title. It will NOT alter Thesaurus Terms or Classifications.

<Enter an update comment for the audit log>

OK Cancel Help

Click OK. The Notes field for the group of documents should now contain the new phrase.

Test this function on a small group of records, before applying to a large group of records.