



Global Search And Replace

User's Manual

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Welcome

Thank you for choosing the Global Search and Replace add-in, created by Sperry Software. This add-in replaces one bit of text with another. It allows you to operate in one or several folders and will look in the contacts, appointments and tasks fields you specify.

Before you go any further, make a backup of the folders you're going to operate on. You can do this quickly and easily by right clicking on a folder in the folder navigation window, then pasting the folder in any other location. You could also create a subfolder and copy all the items (from the folder you're going to operate on) into the subfolder. Then if you discover that a problem has occurred, you could always copy the items in the subfolder back in.

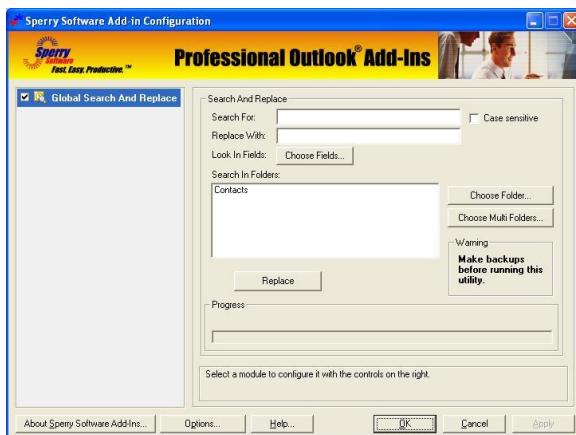
Configuring the Add-in

Once the installation is complete, you are ready to use Global Search and Replace. When you open Outlook you will notice a new button “Sperry Software Add-ins” added to the toolbar.



Clicking this button displays the Sperry Software Add-ins configuration screen. It is on this screen that settings are made to control the add-in's functionality.

How to Use Global Search and Replace



To begin using the add-in simply specifies the text to search for in the first field, and decide if that text to search for is case sensitive. This field accepts not only wildcards but also full regular expressions for the ultimate in flexibility. There is a regular expressions tutorial below, but for now, just know that you can use text like “car*” to match “cars”, “carry”, and “carnival” (Note: do not use quotes in the Search For field).

Then type in the text that will be substituted when the searched for text is found.

Next, choose the fields that the add-in should pay attention to when looking for the text. By default, all the contact fields are chosen when first installing the add-in. You will probably want to eliminate the fields you don't need to avoid making any mistakes (that is, inadvertent replacement of text that matches the pattern in fields you didn't want to replace). There are other shortcuts that you can choose (such as all phone fields), and there's more about this below, but for now, just manually choose the fields you're interested in.

Now, choose the folders the add-in should look in when looking for the text. The Contacts folder is chosen by default, but you will want to choose a folder (or folders) that mirror the choices you made when selecting the fields. This feature is especially useful if you use Advanced Find, or View By

Category, etc and then move those contacts, appointments or tasks into a temporary Outlook folder and then operate on that folder. When you're done, then you can move those contacts, appointments, or tasks back into their original folder.

Now you're ready. Click the Replace button, and the add-in will show its progress in the Progress window. Note that if you made any changes you'll need to click Apply and then click the Replace button.

Look In Fields/Special Instructions

The "Look In Fields" window provides you with a flexible mechanism to limit where the add-in will look for items that it has to change. For instance, you could clear all fields and set it up so that the search only looks at task due dates, or contact business street addresses. Any fields that are checked when you run the search/replace will be included and examined for the pattern you specified. Those that are not checked will be left alone, even if they match the pattern.

For convenience, there are buttons along the bottom of the Look In Fields window that effectively check (or clear) a bunch of buttons all at once for you.

The Select All Fields and Clear All Fields are self explanatory (but bear in mind that they only apply to the fields on the tab you're on, e.g., you have to click on Appointments to select or clear all checkboxes that have to do with appointments).

On the Contacts tab there are three additional buttons, these buttons will check all the boxes that have to do with phone numbers, zip codes or postal codes, or email addresses. These are here because these are the fields that change the most in our experience.

To further refine your search and replacement, there is a "Special Instructions" frame in the Contacts tab to allow you special handling when it comes to phone numbers. You can normally ignore this whole section except when you need to change area codes. When a company moves, or when an area code splits, you can choose to have the add-in pay attention to just area codes in the phone number. This is important because the prefix and/or exchange portion of the phone numbers can sometimes be the same as the area code. To avoid this confusion, when this option is selected, the add-in will only operate on the area code portion of the phone number.

Regular Expression Tutorial

A regular expression is a notation for specifying strings (strings are small bits of text). Like an arithmetic expression, a regular expression is a basic expression or one created by applying operators to simpler expressions. The Search For field recognizes the following operators (special characters):

Char	Description
^	Matches the beginning of a string.
\$	Matches the end of a string.
.	Matches any character.
[]	Character class (any of).
[^]	Complemented character class (any but).
*	Repeat previous zero or more times.
+	Repeat previous one or more times.
?	Repeat previous zero or one time.
\	Treat next character as a literal (e.g. \. means period).
{}	Tagged match.

The following examples illustrate how these characters are used:

Pattern	Description
^stuff	Strings that start with "stuff".
stuff\$	Strings that end with "stuff".
^.{\$	Any 3-character string.
[AEIOU]	Any uppercase vowel.
[0-9]	Any digit.
[A-Za-z][0-9]	Any letter followed by any digit.
[^0-9]	Any character except a digit.
[A-Z][0-9]*	Any upper-case letter followed zero or more of digits.
[A-Z][0-9]+	Any upper-case letter followed one or more of digits.
[A-Z][0-9]?	Any upper-case letter followed by one optional digit.
[+-]?[0-9]+	Any integer preceded by an optional sign.

As you can see, regular expressions allow for more complicated, and thus more powerful pattern recognition.

Troubleshooting

Q. The “Sperry Software Add-ins” button is not visible.

A. The add-in may have become disabled.

For Outlook 2002, 2003 users:

On the Outlook Menu, click Help...About Microsoft Outlook

Click the “Disabled Items” button

If “Sperry Software” is listed, enable it and restart Outlook

For Outlook 2007 users:

On the Outlook Menu, click Help...Disabled Items

If “Sperry Software” is listed, enable it and restart Outlook

The Sperry Software toolbar may not be set to “Visible”

On the Outlook Menu, click View...Toolbars and make sure that Sperry Software is checked.

Q. The “Sperry Software Add-ins” button does not respond.

A. Run the add-in Reset tool.

The add-in reset tool can be downloaded from

<http://www.sperrysoftware.com/outlook/tools.asp>

Q. How can we contact you for more help?

A. For help on more in-depth issues, check out our [Knowledge Base](#).