Quick instructions on using the provided mail merge documents to produce labels

"Mail merge" is a relatively simple way to take collection data (from a spreadsheet) and produce pre-formatted labels. We provide, here, two sets of files: one for producing specimen labels, and another for producing annotation labels. These files may be used as is, or easily modified for specific formats and uses.

Files: labels_template.doc and labels_datafile.xls for producing herbarium labels; annotation_labels_template.doc and annotation_labels_datafile.xls for producing annotation labels.

1. Download the files, and place them in a common folder (directory). To get a feel for how they work, open the Microsoft Word file "labels_template.doc" (or "annotation_labels_template.doc" if you wish to work on annotation labels). Word will ask you if the file is from a trusted source (which of course it is!), and then ask which worksheet in the datafile to use—choose the default selection.

2. What you see next depends on your settings, and version of Word, etc. But basically, you'll be presented with a document with lots of double arrows (« and »). These double arrows enclose text blocks that tell Word to go to the datafile and take the entry from the column with that name and insert it into the Word file. To preview what will happen, using the example entries already included in the datafiles, press the preview button (it has the double arrows with ABC beneath them) in the Mail Merge Manager. If the Mail Merge Manager is not visible, you can get to it from the Tools pull-down menu. [Older versions of Word may have a slightly different way of operating the Mail Merge functions, but it should be clear enough from within the Tool pull-down menus.] The Word file goes and pulls the relevant values for each field from paired Excel spreadsheet, and ta-da, there're your labels! Pressing the preview button again restores the document to its original, data-free view, so you can switch back and forth to understand where the various text fragments are coming from, and how they are formatted.

3. To work on your own data, close the Word file, and open the relevant Excel spreadsheet ("annotation_labels_datasheet.xls" or "labels_datasheet.xls" depending on which you wish to make).

4. Delete the examples we've provided (after looking through them to make sure that you understand the intent for each column, and how each is formatted in the resulting labels), and enter your collection information. If you need more than one label for a particular collection, duplicate the entry on a second line. Save your datafile, and close it (the system can get confused if you have both the Excel and the Word file open simultaneously).

5. Open the linked Word document (labels_template.doc or annotation_labels_template.doc), and follow the same steps as in 1 and 2, above.

6. If you're happy with how your labels look, select "merge to file" from the Complete Merge section of the Mail Merge Manager (the merge to file button is the second from the left, at the bottom). This will produce a new Word file, with your labels.

7. Check your labels for accuracy. You can edit this document directly if necessary. For example, the merge will often produce things like ". . ." if some of the fields in the original spreadsheet were empty, so you should go an replace-all of these, all double spaces, etc.

8. You're done! Save your labels in the Word doc, or as a pdf, and print them on acid-free archival quality paper. Unless you've made specific intentional changes, do not save changes to the template file, only to the new label file that you produced.

9. With some experience, and experimentation, you can easily modify these files to produce labels of different sizes, with different fields, and using different formatting.