

UC/JEPS Specimen Label Mail Merge

This workflow was developed based on the "Creating Herbarium Labels with Mail Merge in Word" presentation by Richard Carter and Phillip Lowe (VSC) at the iDigBio Mobilizing Small Herbaria for Digitization 2013 workshop.

<https://www.idigbio.org/content/creating%C2%A0herbarium%C2%A0labels-%C2%A0mail%C2%A0merge%C2%A0%C2%A0word>

<https://www.idigbio.org/content/mobilizing-small-herbaria-workshop>
https://www.idigbio.org/wiki/index.php/Small_Herbarium_Workshop_FSU

The Word and Excel documents used for the UC/JEPS Mail Merge are designed following the format used for the UC/JEPS configuration in BiSciCol FIMS (Field Information Management System: <http://biscicol.org/biocode-fims/>). As such, once the spreadsheet is filled and the labels are made, minimal processing is required before the spreadsheet can be bulk-loaded into the UC/JEPS instance of CollectionSpace via FIMS (separate protocol documented in README_FOR_UCJEPS_FIMS.docx)

UC/JEPS is almost entirely a Mac shop, so these instructions are based on Excel for Mac 2011. Carter's slideshow already gives excellent instructions for doing Mail Merge in the Windows version of Excel, so please use that as a supplement if you need to work in Windows.

Instructions

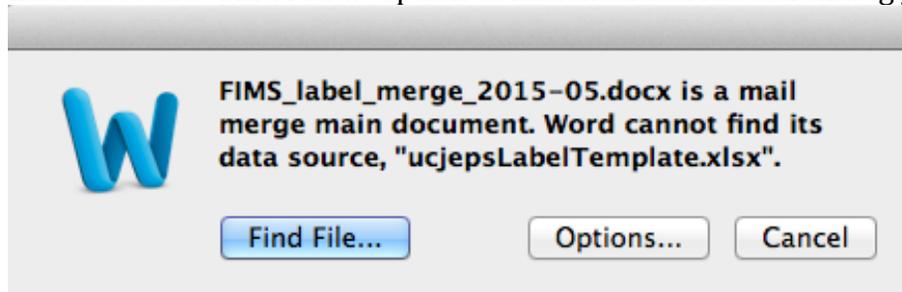
Files included for this procedure:

- FIMS_label_merge.docx
- Data_Entry_Template_CNPS.xlsx

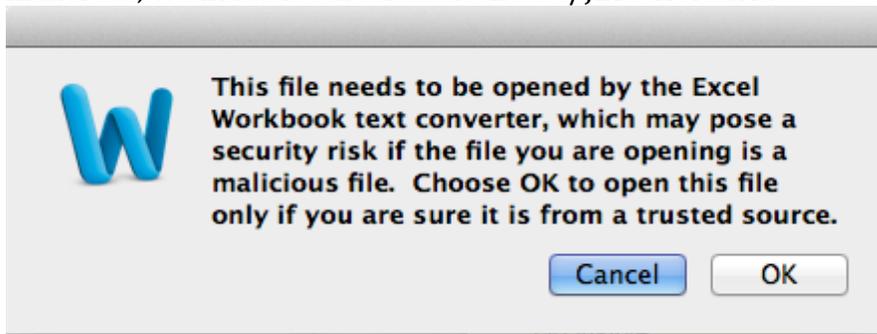
0. Open **Data_Entry_Template_CNPS.xlsx** and fill in your specimen data in the "Specimens" tab. Field definitions are on the "Data Fields" tab and some general instructions on the "Instructions" tab. Once your data are filled in. Save the xlsx file under the same file name or a new name.

[NOTE: The Excel file has example data in the "Examples" tab. These can be used for testing the mail merge, or can be ignored]

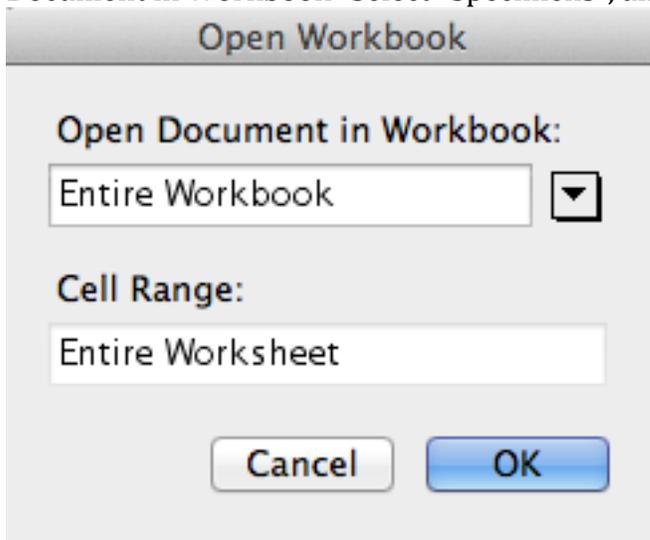
1. Open **FIMS_label_merge.docx**. By default the file will try to open an Excel file called "Data_Entry_Template_CNPS.xlsx", which won't be found if you changed your spreadsheet name. Use the "Find File..." option to find the Excel file containing your data



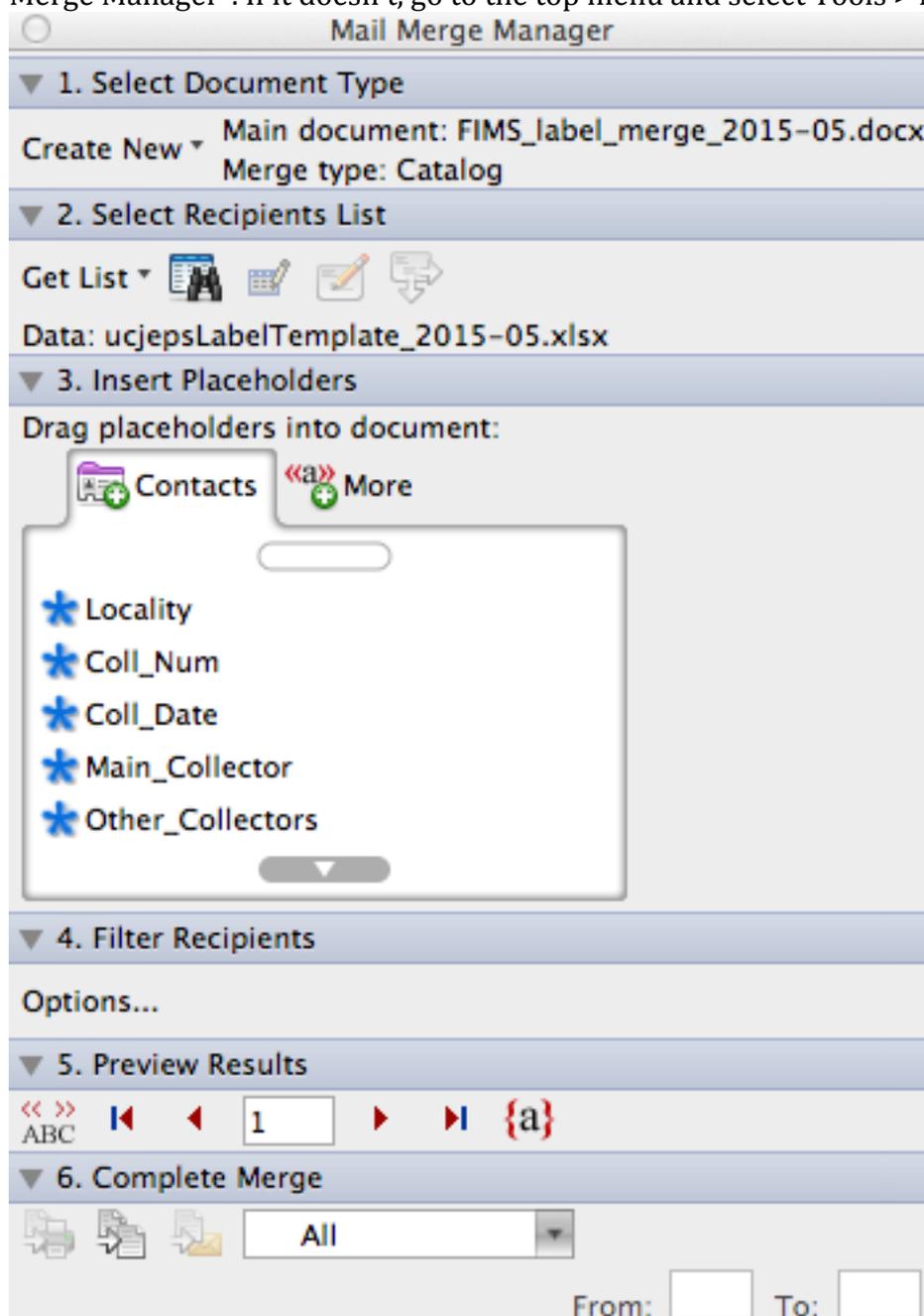
2. You may get a warning that looks like the following. Just click okay. The file isn't malicious; we made it ourselves at the UC/JEPS Herbaria



3. The next prompt is to select the data from the Excel file that you want to use. For "Open Document in Workbook" Select "Specimens", and leave Cell Range as "Entire Worksheet"

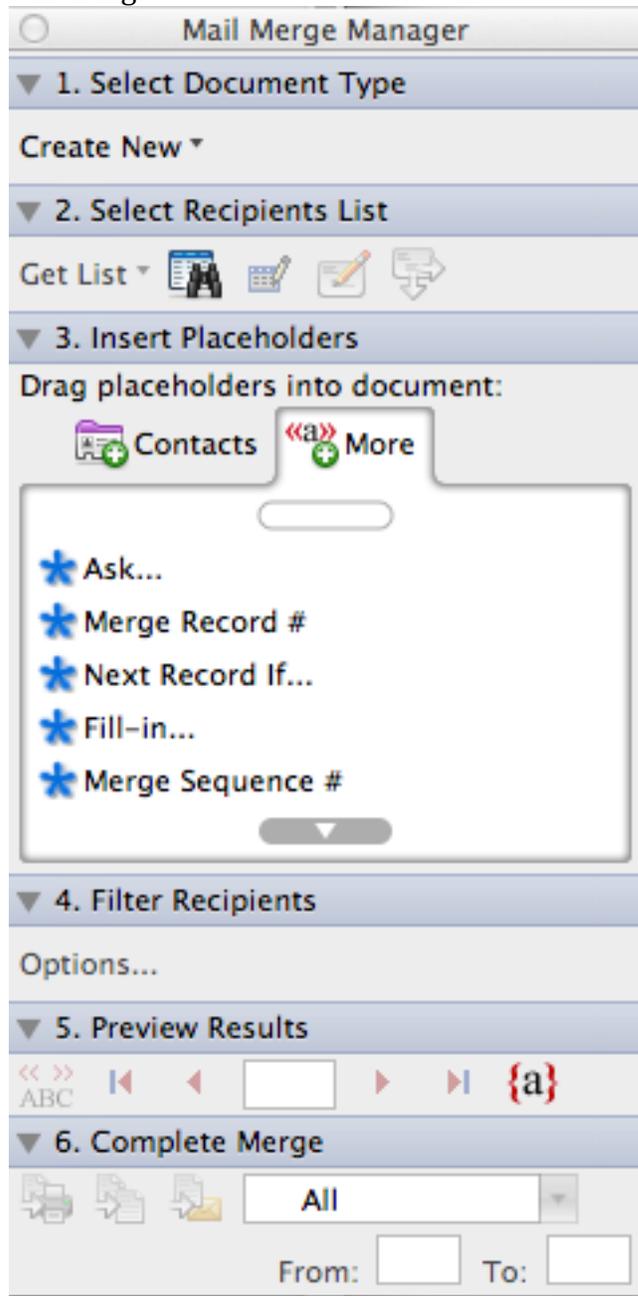


4. The document should now open. It should also open a separate little window called "Mail Merge Manager". If it doesn't, go to the top menu and select Tools > Mail Merge Manager



5. If the Mail Merge Manager looks like the image in step 4, then you can complete the merge by clicking the second icon under "6. Complete Merge", which is "Merge to New Document". This will open a separate document that is a plain old Word document containing all the labels. If the merge manager looks more empty, as below, then do the

following:



- a. under 1: Create New: Catalog
 - b. under 2: Get List: Open Data Source
 - i. find your spreadsheet file, select OK
 - ii. Choose workbook: Specimens and Cell Range: Entire Sheet
 - c. under 6: Click the second icon, which is "Merge to New Document"
6. Once you have your Word document, check it out and make sure it looks sane. You will have to manually add in line breaks when labels are spread across two columns/pages. Another issue is that scientific names do not automatically italicize. You may also do this manually if you wish.
7. Once the labels are formatted to your choosing, you can print the document as you normally would. **Please use archival paper for herbarium specimen labels!**