



Creating Labels

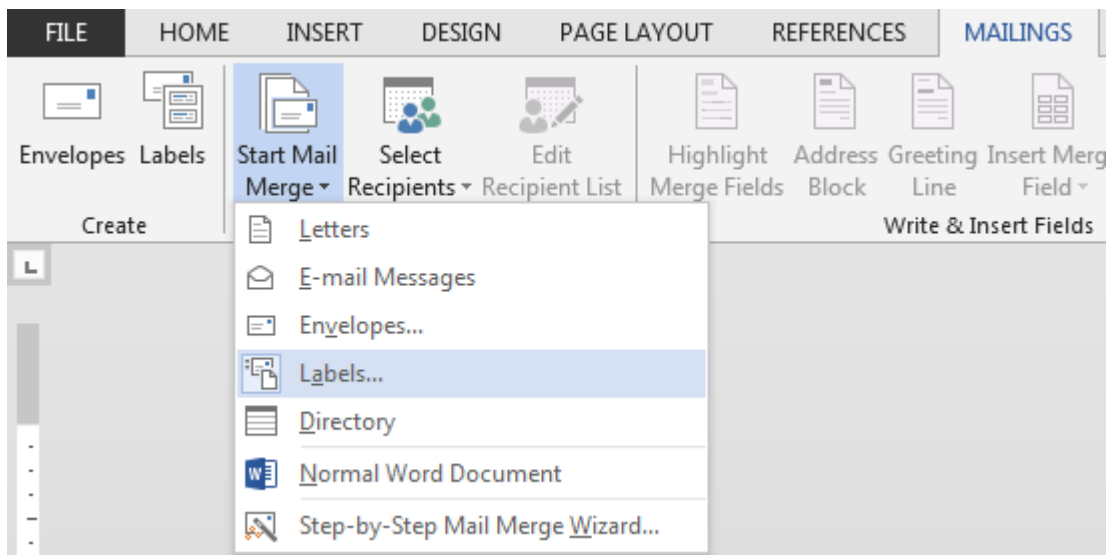
The following are instructions for creating labels using a report saved as an Excel spreadsheet and Mail Merge in Word. These instructions were made using Microsoft Office 2010.

STEP 1: Save Ad-Hoc Report as Excel Spreadsheet

STEP 1A: Delete **all tabs** except for the tab being used to create the labels and save the spreadsheet

STEP 2: Start Mail Merge Process

- a. Open a new Word document
- b. Click the **Mailings** tab
- c. In the **Start Mail Merge** group, click the drop-down arrow next to **Start Mail Merge**

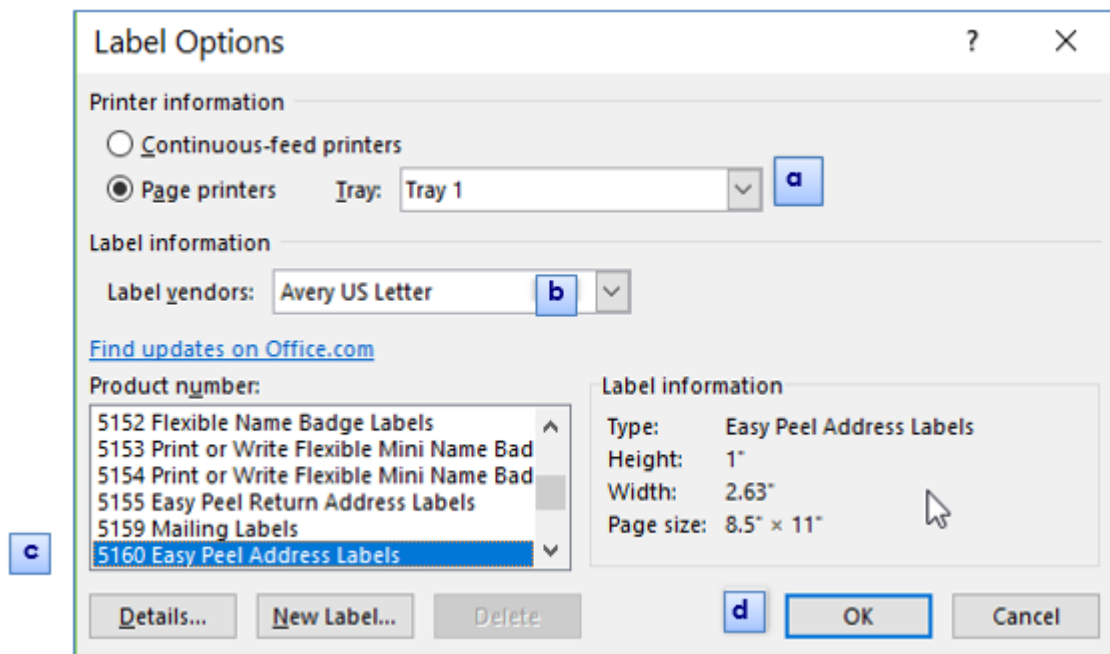


- d. Click on **Labels**. The **Label Options** dialog box will open.

STEP 3: Select Printer Tray and Labels

See print screen on next page.

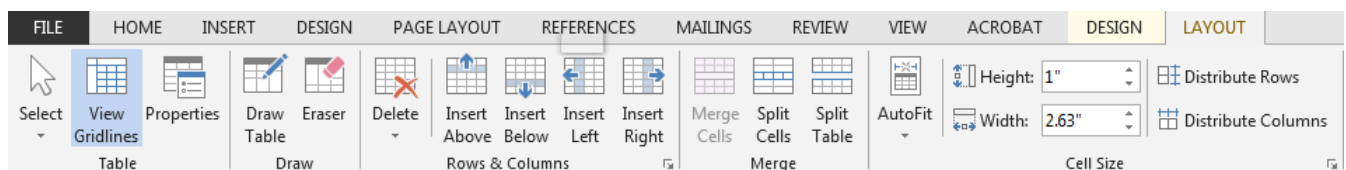
- Select **Tray 1** from the **Tray** drop-down
- Select **Avery US Letter** from the **Label vendors** drop-down
- Scroll down and click on **5160** (this assumes you are using the labels provided by CSC on the Request for Supplies form – if not, select the correct vendor and label type)
- Click **OK**



If you do not see label lines on your document:

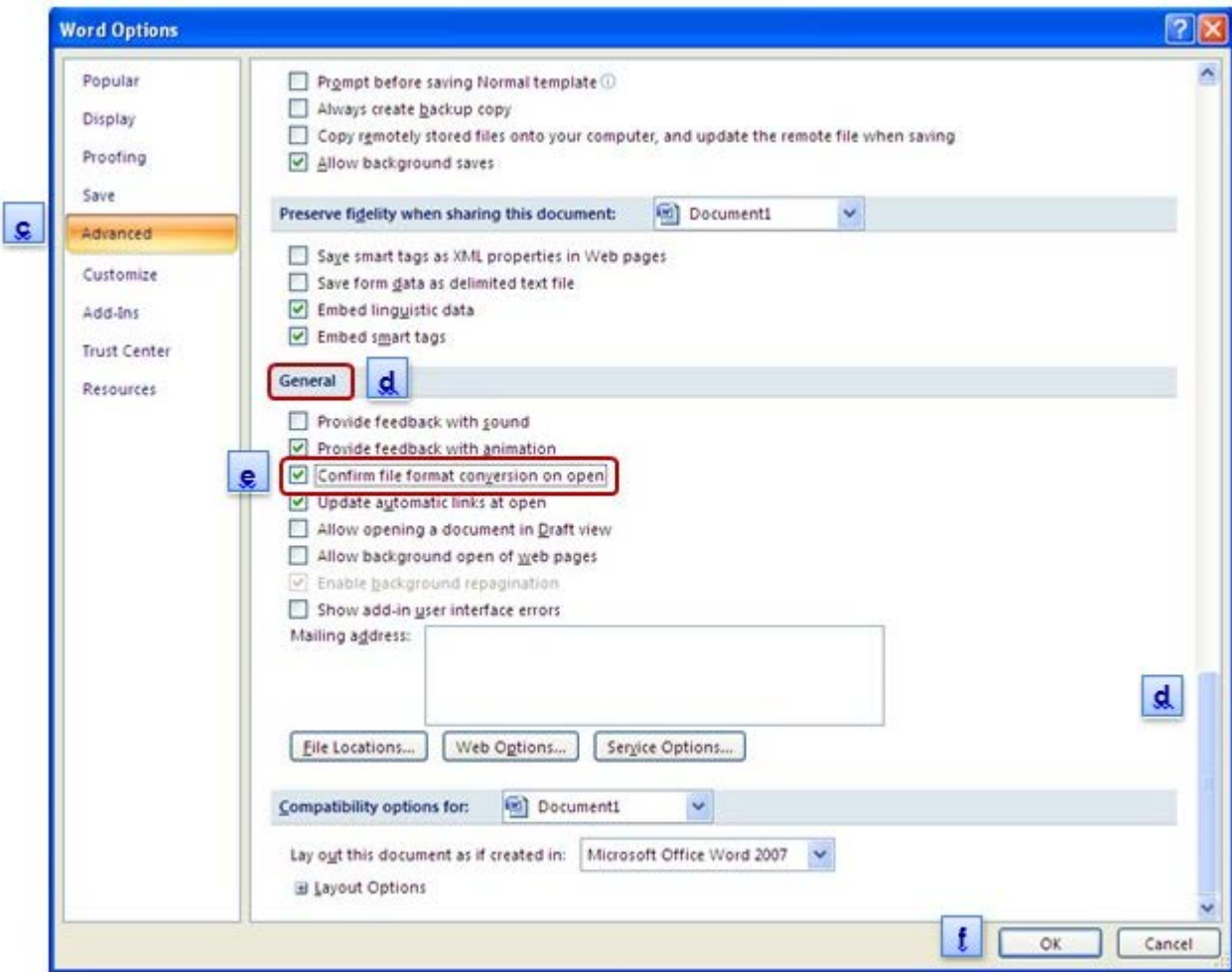
Click in the middle of the page. The **Table Tools** will appear on the ribbon. Inside the **Table Tools**, click on the **Layout** tab.

Click on **View Gridlines**.



STEP 4: First Time Creating Labels? If not, skip to STEP 5.

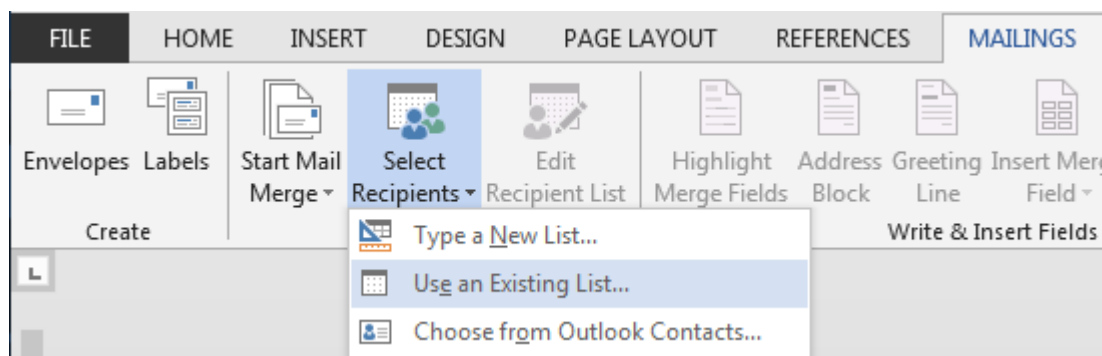
- Click the **File** tab
- Click on **Options** at the bottom of the **File** menu. This opens the **Word Options** window.
- Click on **Advanced**



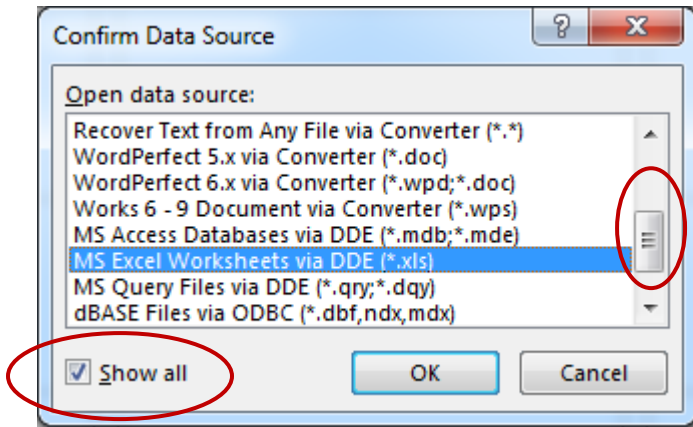
- d. Scroll to the bottom to the **General** section
- e. Click the **Confirm file format conversion on open** check box
- f. Click **OK**

STEP 5: Connecting Labels to Your Report

- a. If you completed STEP 4, click on the **Mailings** tab. Otherwise, if you skipped to STEP 5, start on Step b.
- b. Click the drop-down arrow next to **Select Recipients** in the **Start Mail Merge** group.

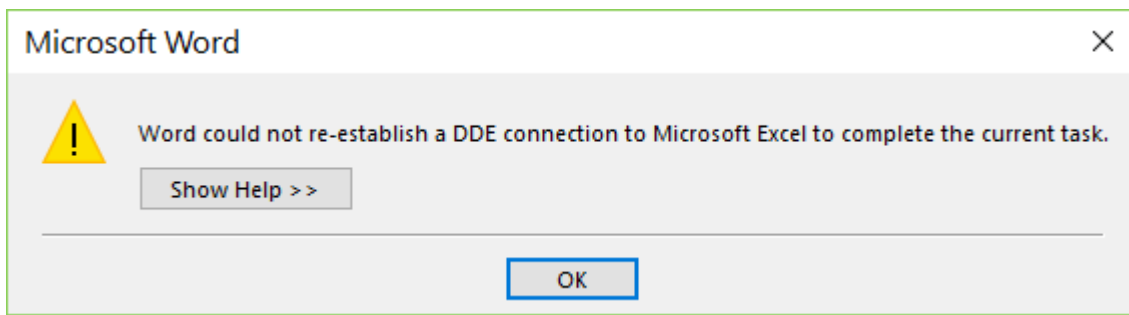


- c. Click on **Use Existing List**
- d. The **Select Data Source** window will open. Find your saved report and open it.
- e. The **Confirm Data Source** dialog box will open. Click on **MS Excel Worksheets via DDE (*.xls)**

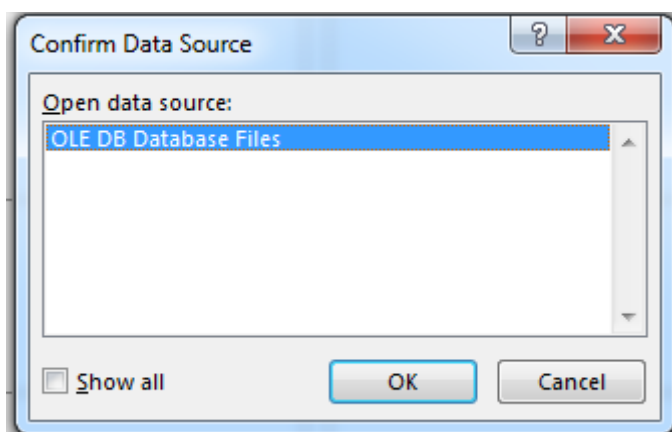


NOTE! If you don't see the **MS Excel Worksheets via DDE (*.xls)** in the list, click on **Show All**. Scroll up or down. Click **OK**.

NOTE: If you see this error:

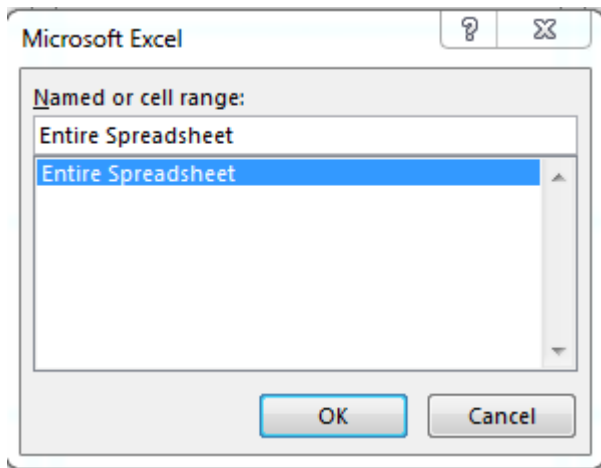


Use the default OLE DB instead:

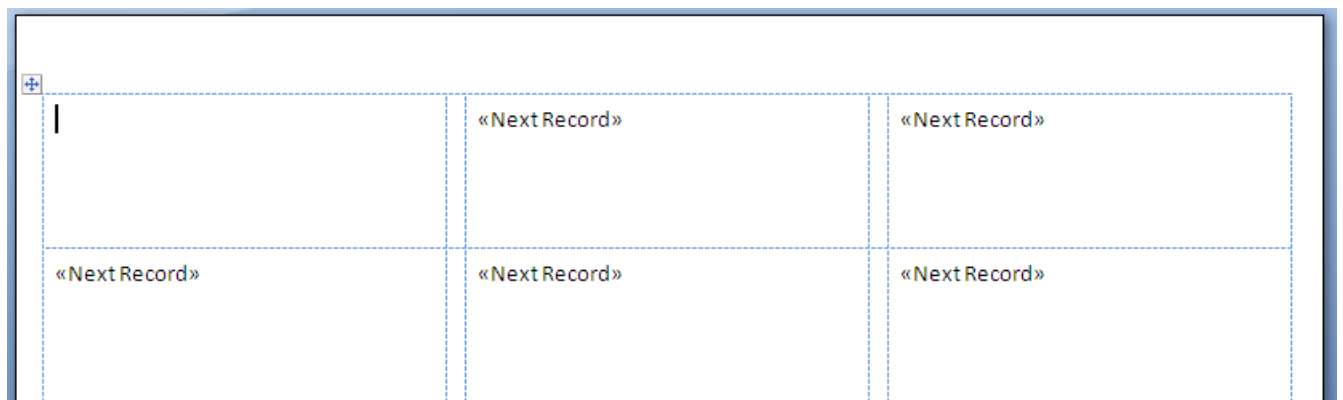


- f. The **Microsoft Office Excel** dialog box will open.

We are going to use the entire **Microsoft Office Excel** spreadsheet, not just specified cells. Click **OK**.



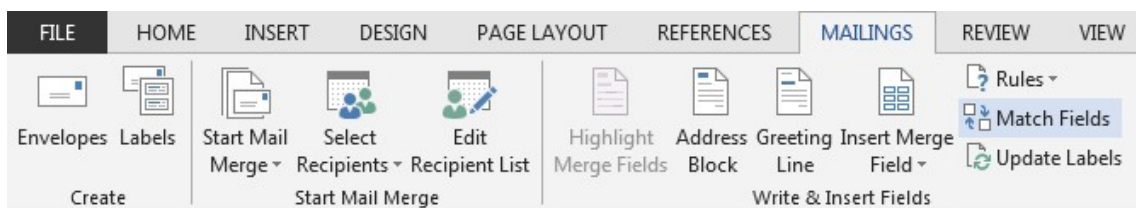
Your Word document should now have <<Next Record>> displayed in each label:



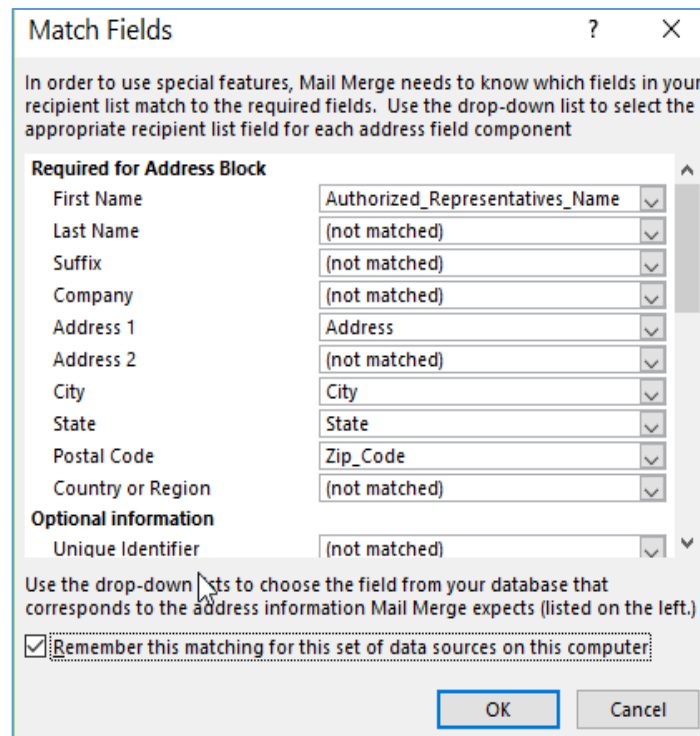
STEP 6: Creating Mail Merge Fields

NOTE! Mail Merge Fields correspond to the column headers in your report (Excel spreadsheet) and are designated by << >>, which do not display on the actual printed labels.

- a. Double-click on **Match Fields** in the **Write & Insert Fields** group

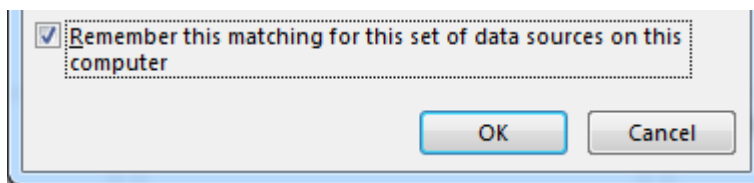


- b. The **Match Fields** dialog allows you to match typical label fields with the column headers in your report. Only match those that you want to display on your label, by clicking on the down arrow to choose the data field that should be matched to that particular Address Block field and that should appear on the label.



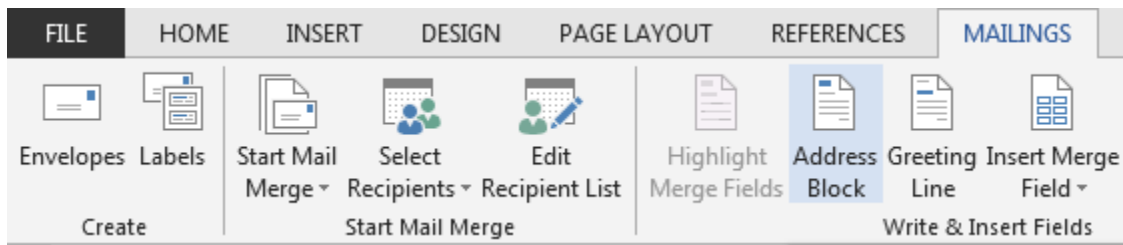
The following are applicable to the specific report: **View Appointments for Dates**. However, the same steps apply for any labels you may be creating.

- c. Click the drop-down next to **First Name** and select **PROXY_FIRST_NAME**
- d. Click the drop-down next to **Last Name** and select **PROXY_LAST_NAME**
- e. Click the drop-down next to **Address 1** and select **ADDRESS**
- f. City, State and Zip Code probably auto-matched. If not, select those also.
- g. Click the **Remember this matching for this set of data sources on this computer** check box to insert a checkmark

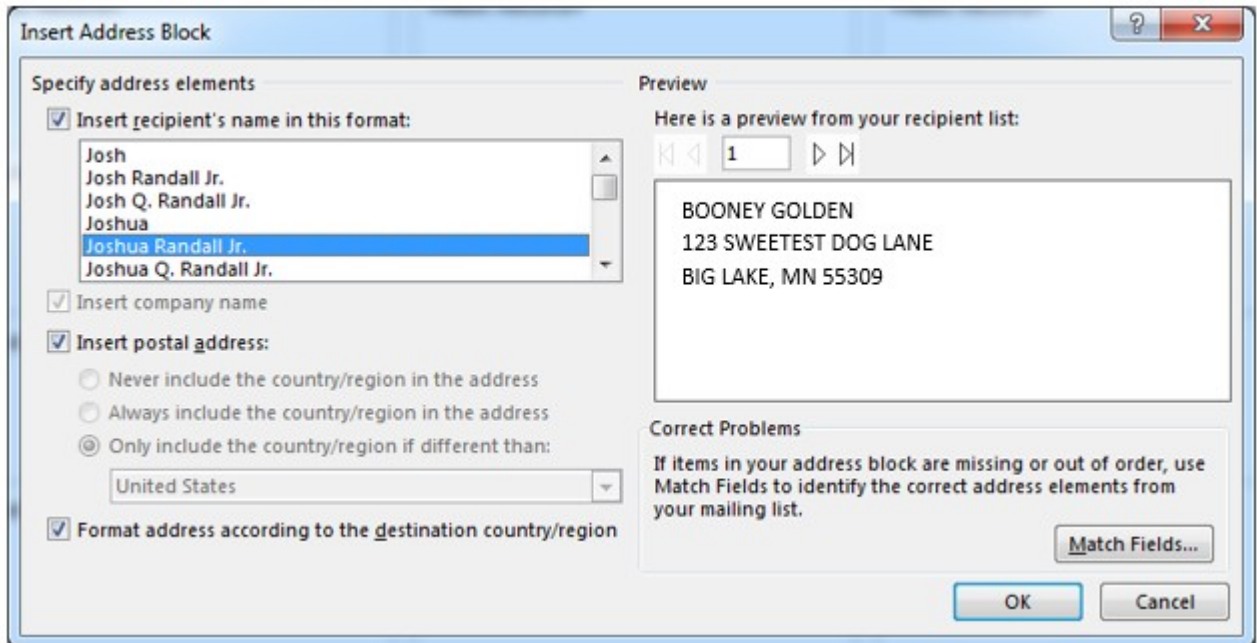


- h. Click **OK**

- i. Double-click on **Address Block** in the **Write & Insert Fields** group.



- j. The **Insert Address Block** dialog box will open and display how the labels will appear

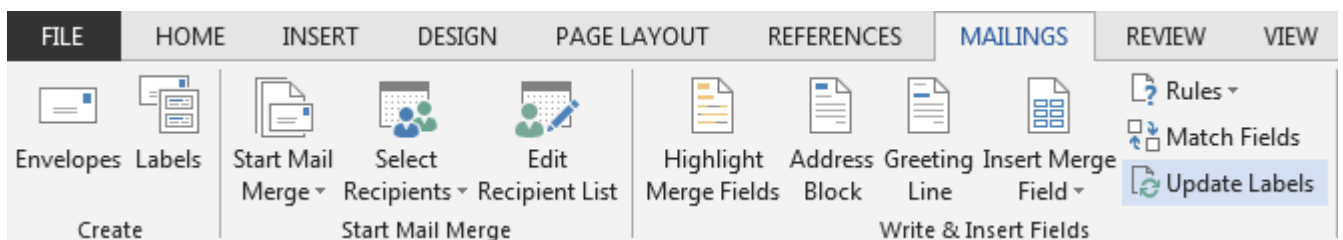


- k. Click **OK**

Your Word document should now display <<AddressBlock>> on each label:



- l. Double-click on **Update Labels** in the **Write & Insert Fields** group.

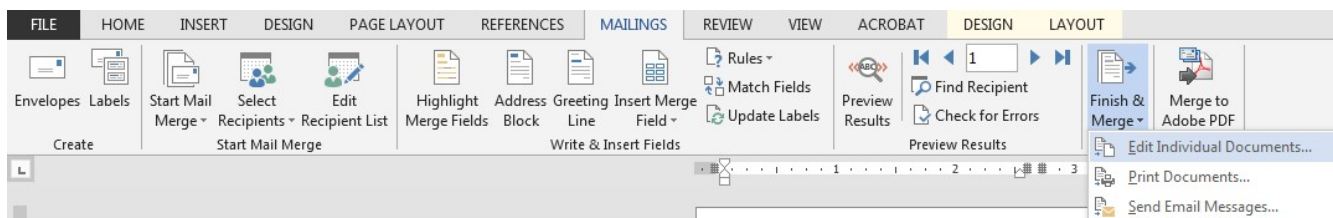


Your document should now display <<Next Record>><<AddressBlock>> on each label:

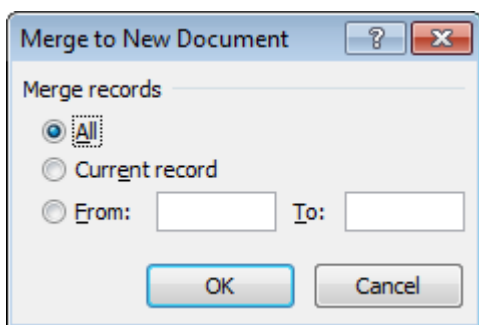


STEP 7: Creating the Labels Document, Saving It & Printing

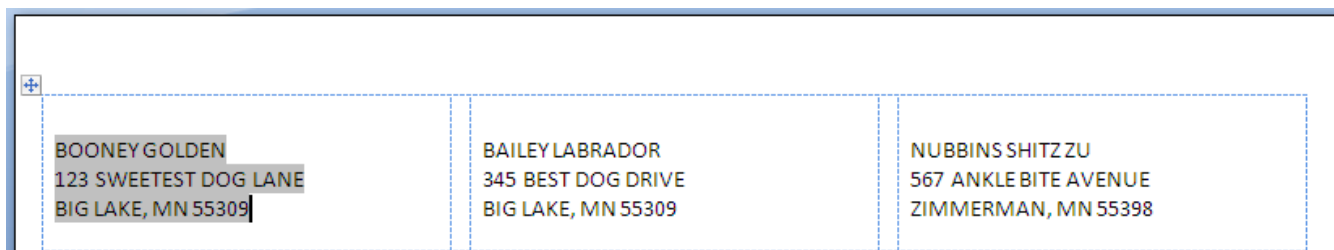
- a. Click on the drop-down arrow next to **Finish & Merge**



- b. Click on **Edit Individual Documents...**
- c. The **Merge to New Document** window will open



- d. Click the **OK** button
- e. A new Word document will open with your labels



- f. Save this document as your labels (Click on **File...Save**)
- g. To print:
- Place your labels into Tray 1
 - Click on **File**
 - Click on **Print**

STEP 8: Saving the Labels Template Document and Re-Using It

NOTE! You can edit the labels by clicking on **Edit Recipient List** in the **Start Mail Merge** group on the **Mailings** tab. You can delete individual records from your labels by removing the checkmark in front of each record. The highlighted record in the **Edit Recipient List** will display in the first cell of the table when you leave this screen. Click on the top record to highlight before exiting to return to the original label display.

- a. If you are going to create these labels again using the same Excel file (you can update the Excel file as long as the name of the file remains the same). Click on **File...Save** to save the template for your labels (save it to the same folder as your Excel file).
- b. Click on the **Mailings** tab.
- c. Click on **Finish & Merge**.
- d. Click on **Edit Individual Documents...**
- e. Click the **OK** button on the **Merge to New Document** window
- f. A second Word document will open with the new labels.

Revision History:

- *March 2017 – updated images*
- *April 2017 – Added print screen for work-around if "...unable to re-establish DDE link..." error occurs*