

Instructions for printing labels using the Mail Merge function in Word

1) Create Excel file listing all of the label details. Save Excel file on computer.

Col 1= Study ID (e.g., 201A01-230B13)

Cols 2-6=Text that should appear on each label

A	B	C	D	E	F
Study ID	Type 1:	Type 2:	Type 3:	Type 4:	Type 5:
201A01	Consent	Specimen	Lab Register	Aliquot-1	Aliquot-2
201A02	Consent	Specimen	Lab Register	Aliquot-1	Aliquot-2
201A03	Consent	Specimen	Lab Register	Aliquot-1	Aliquot-2
201A04	Consent	Specimen	Lab Register	Aliquot-1	Aliquot-2

- 2) Open a new Word document. Go to 'Mailings' tab.
- 3) Click 'Labels'. Follow instructions below to set up label structure (refer to instructions with label if different supplier/label size)

Diversified Biotech LCRY-1700

- Label size: 1.28" X 0.5"
- Top Margin: 0.24"
- Side Margin: 0.77"
- Vertical Pitch: 0.63"
- Horizontal Pitch: 1.40"
- Label Height: 0.50"
- Label Width: 1.28"
- No Across: 5
- No. Down: 17
- Page Size: 8.5" X 11"

- 4) Click 'Start Mail Merge' > 'Labels' from the Mailing menu. In the pop-up, select the appropriate label settings under 'Product Number' (refers to structure set up in step 3 above).
- 5) Click 'Select Recipients' > 'Use an existing list' from the Mailings menu. Navigate to the Excel file created in step 1 above. Select appropriate sheet in Excel file from the menu and click 'OK'. The screen will look like this:

	«Next Record»	«Next Record»	«Next Record»	«Next Record»
«Next Record»	«Next Record»	«Next Record»	«Next Record»	«Next Record»

- 6) With the cursor in the top right-hand labels, click on 'Insert Merge Field' from the Mailings menu, and select 'Study ID'. Tab onto the next line and insert another field ('Type 1'). Repeat for the remaining labels in the first row, replacing 'Next Record' with 'Study ID' field and populating with Types 2-5:

«Study_ID» «Type_1»	«Study_ID» «Type_2»	«Study_ID» «Type_3»	«Study_ID» «Type_4»	«Study_ID» «Type_5»
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- 7) In the first label of the second row, leave 'Next Record', then insert 'Study ID' and 'Type 1'. This tells the system to switch to the next record in the Excel file for this row. In the 2nd – 5th labels in the second row, follow the same procedure as in the first row (replacing 'Next Record' with 'Study ID' and populating with Type 2-5):

«Study_ID» «Type_1»	«Study_ID» «Type_2»	«Study_ID» «Type_3»	«Study_ID» «Type_4»	«Study_ID» «Type_5»
«Next Record»«Study_ID»	«Study_ID» «Type_2»	«Study_ID» «Type_3»	«Study_ID» «Type_4»	«Study_ID» «Type_5»

- 8) If any tweaks are needed to the font or spacing of the text (e.g., altering font size, bold/italicizing text, shifting text over 1-2 spaces to correct misalignment with printer), do it in the first and second rows first, then copy the second row to all remaining rows on the page. If any blank rows are needed on the sheet, blank out all text in the label.

«Study_ID» «Type_1»	«Study_ID» «Type_2»	«Study_ID» «Type_3»	«Study_ID» «Type_4»	«Study_ID» «Type_5»
«Next Record»«Study_ID»	«Study_ID» «Type_2»	«Study_ID» «Type_3»	«Study_ID» «Type_4»	«Study_ID» «Type_5»
«Next Record»«Study_ID»	«Study_ID» «Type_2»	«Study_ID» «Type_3»	«Study_ID» «Type_4»	«Study_ID» «Type_5»
«Next Record»«Study_ID»	«Study_ID» «Type_2»	«Study_ID» «Type_3»	«Study_ID» «Type_4»	«Study_ID» «Type_5»
«Next Record»«Study_ID»	«Study_ID» «Type_2»	«Study_ID» «Type_3»	«Study_ID» «Type_4»	«Study_ID» «Type_5»
«Next Record»«Study_ID»	«Study_ID» «Type_2»	«Study_ID» «Type_3»	«Study_ID» «Type_4»	«Study_ID» «Type_5»
«Next Record»«Study_ID»	«Study_ID» «Type_2»	«Study_ID» «Type_3»	«Study_ID» «Type_4»	«Study_ID» «Type_5»
«Next Record»«Study_ID»	«Study_ID» «Type_2»	«Study_ID» «Type_3»	«Study_ID» «Type_4»	«Study_ID» «Type_5»
«Next Record»«Study_ID»	«Study_ID» «Type_2»	«Study_ID» «Type_3»	«Study_ID» «Type_4»	«Study_ID» «Type_5»
«Next Record»«Study_ID»	«Study_ID» «Type_2»	«Study_ID» «Type_3»	«Study_ID» «Type_4»	«Study_ID» «Type_5»

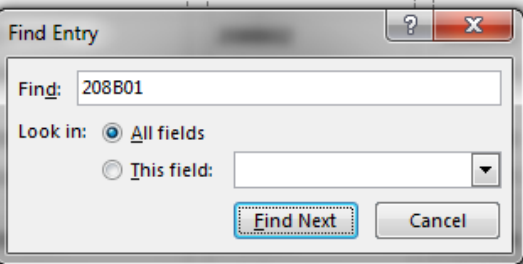
9) Click 'Preview Results', which will pull in text from the Excel file to populate the labels:

201A01 Consent	201A01 Specimen	201A01 Lab Register	201A01 Aliquot-1	201A01 Aliquot-2
201A02 Consent	201A02 Specimen	201A02 Lab Register	201A02 Aliquot-1	201A02 Aliquot-2
201A03 Consent	201A03 Specimen	201A03 Lab Register	201A03 Aliquot-1	201A03 Aliquot-2
201A04 Consent	201A04 Specimen	201A04 Lab Register	201A04 Aliquot-1	201A04 Aliquot-2
201A05 Consent	201A05 Specimen	201A05 Lab Register	201A05 Aliquot-1	201A05 Aliquot-2
201A06 Consent	201A06 Specimen	201A06 Lab Register	201A06 Aliquot-1	201A06 Aliquot-2
201A07 Consent	201A07 Specimen	201A07 Lab Register	201A07 Aliquot-1	201A07 Aliquot-2
201A08 Consent	201A08 Specimen	201A08 Lab Register	201A08 Aliquot-1	201A08 Aliquot-2
201A09 Consent	201A09 Specimen	201A09 Lab Register	201A09 Aliquot-1	201A09 Aliquot-2

10) To print labels, select 'Finish and Merge' > 'Print Documents' from the Mailings menu. To print the current set of labels, select 'Current Record'.

11) To navigate to a set of labels, select 'Find Recipient' from the Mailings menu, enter in the label, and click OK

208B01 Consent	208B01 Specimen	208B01 Lab Register	208B01 Aliquot-1	208B01 Aliquot-2
208B02 Consent				208B02 Aliquot-2
208B03 Consent				208B03 Aliquot-2
208B04 Consent	Specimen	Lab Register	Aliquot-1	208B04 Aliquot-2



Example of completed labels:

680C01 Consent	680C01 Specimen	680C01 Lab Register	680C01 Aliquot-1	680C01 Aliquot-2
680C02 Consent	680C02 Specimen	680C02 Lab Register	680C02 Aliquot-1	680C02 Aliquot-2
680C03 Consent	680C03 Specimen	680C03 Lab Register	680C03 Aliquot-1	680C03 Aliquot-2
680C04 Consent	680C04 Specimen	680C04 Lab Register	680C04 Aliquot-1	680C04 Aliquot-2

Notes:

- Word document is linked to the Excel file. **Do not move the location of the Excel file** or it will cause errors.
- Can share Excel file source data but create Word document labels from scratch (linkages between Word and Excel can cause issues if attempting to share the Word document).
- If changes are needed to the source data in the Excel file (e.g., missing label), close out of the Word document, open up the Excel and make any changes, then re-open the Word document. The back-end file will be automatically updated. **NEVER** use the 'Update Labels' button on the Mailings menu; it will cause errors.
- If you run into issues printing multiple pages at once (printer gets misaligned the pages, throwing off the printing) try printing one page at a time.