

Appendix C: Label Printing Using Mail Merge - Office 2013

From the Reports submenu, create the desired label type (Follow-up, Patient, etc.). The labels will then be displayed, as seen in the example below:

CPDMS - Mozilla Firefox

https://kcrpcdms.net/cpdms-5479/Reports/FollowUpMaster.php

CANCER PATIENT DATA MANAGEMENT SYSTEM .net

TONYA BRANDENBURG TRAINING DATABASE Follow-Up Labels

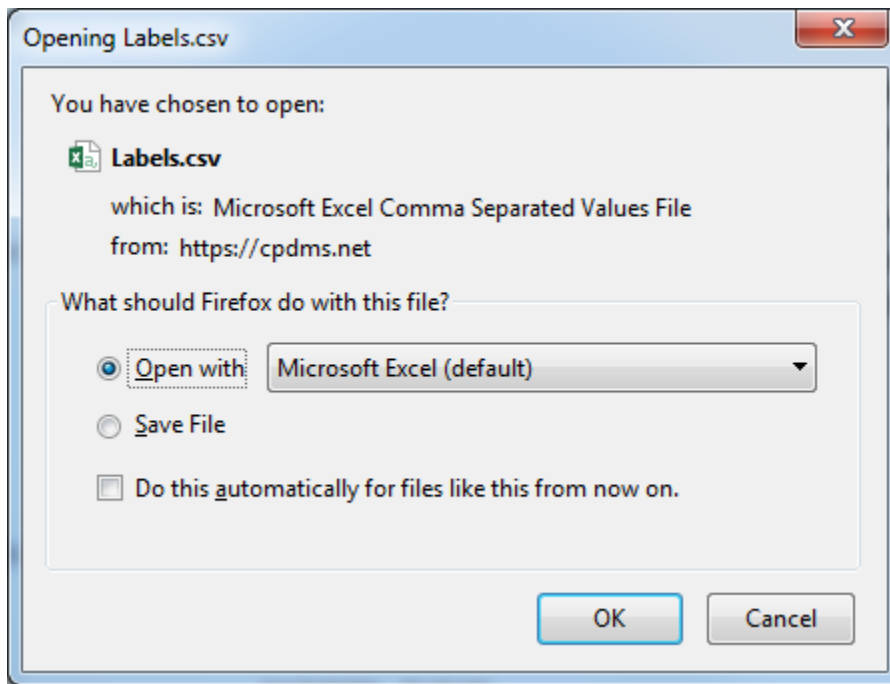
TRAINING DATABASE : 0000090201
Case Classes Included: All Analytic 00 - 22
Cervix Cases Staged As Insitu Are Not Included
Patients With No Follow-Up For Months Prior To 06/23/2015
Registry Reference Year = All
Report Sorted By: LastName,FirstName

ABE, MOHAMMAD Z	ABE, MOHAMMAD Z
Address1	Testis 02/20/1997
Address2	REG ACC # : 19970695 SEQ # : 1
HOSKINSTON, KY 40844	BD: 07/01/1969 DLC: 06/21/2011
JACKSON, SUSAN	ABE, MOHAMMAD P
8 MEDICAL CIRCLE	Kidney 10/08/1999
GEORGETOWN, KY 40324	REG ACC # : 19991125 SEQ # : 1
	BD: 08/27/1934 DLC: 04/04/2013
	MD: DOC3 JACKSON
LastName, FirstName	ABE, MOHAMMAD E
Address1	Liver 07/28/2000
Address2	REG ACC # : 20000403 SEQ # : 1
CROPPER, KY 40057	BD: 10/05/1953 DLC: 08/29/2000

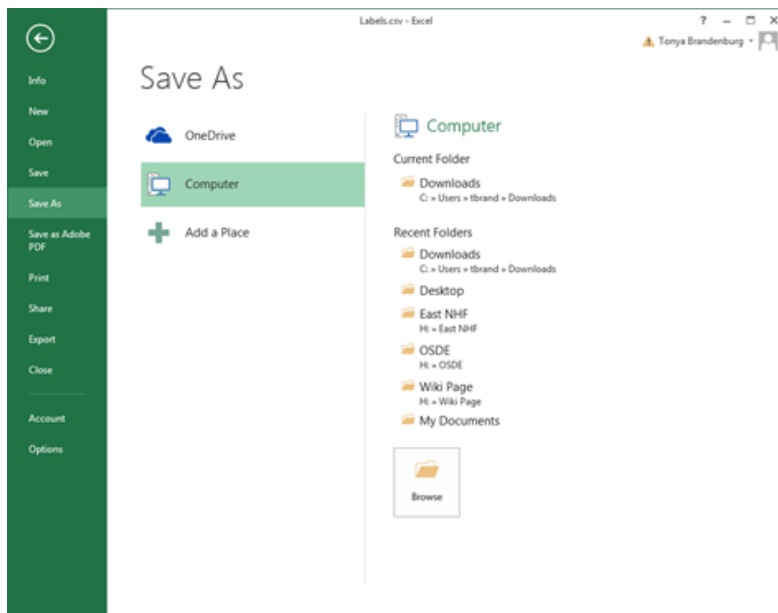
Save Print Cancel Main

Note: Once labels have been generated by CPDMS.net and saved to a user's computer, the file may be manipulated and printed using any type of spreadsheet and/or word processing software. However, KCR only supports label printing using Microsoft® Excel and Microsoft® Word.

Choose the "Save" button and a dialog box will appear with the default filename "Labels.csv" and "comma separated" as the specified file format. The filename may be overwritten with another name, but be sure to preserve the .csv extension.

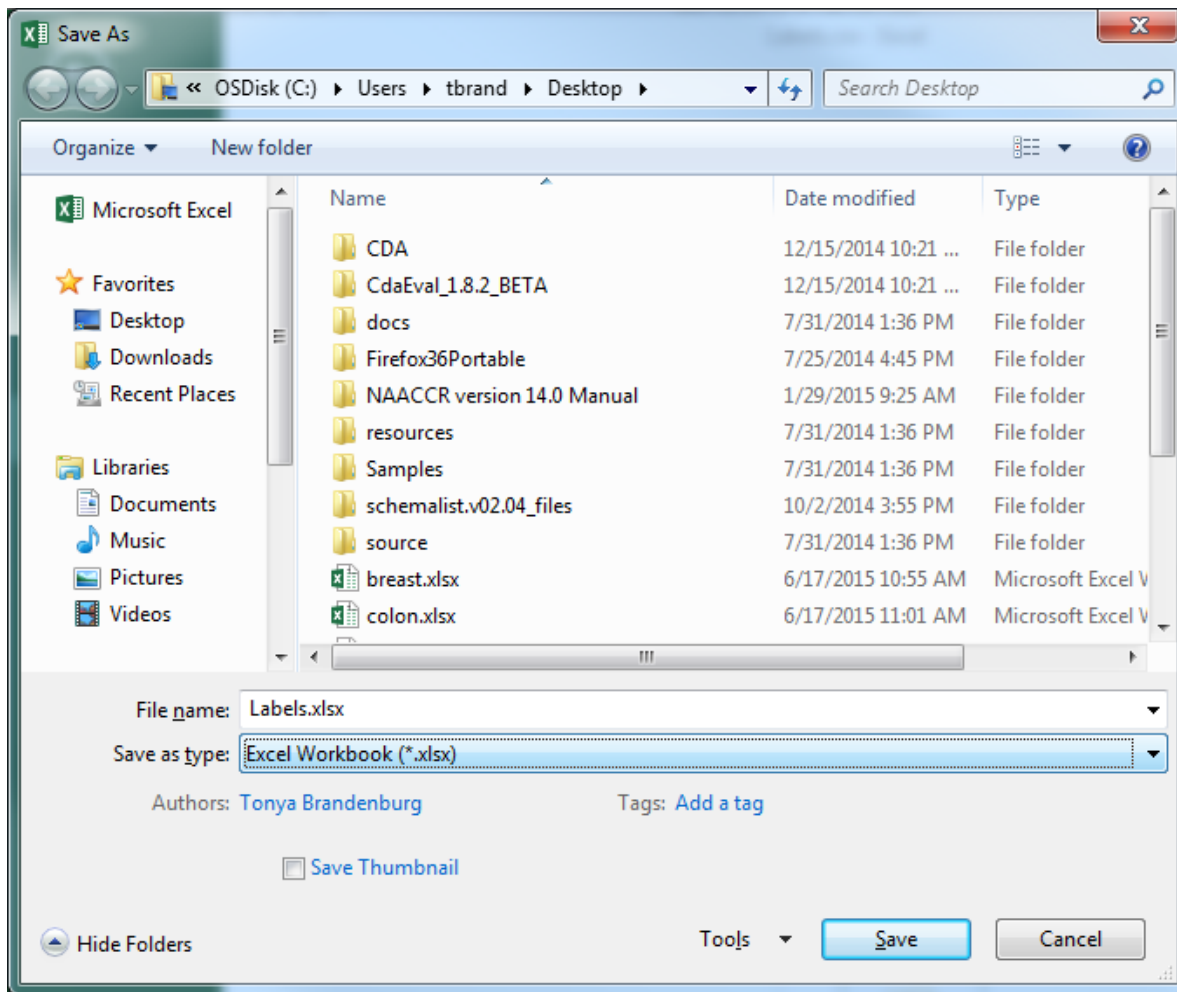


Select "Submit" and then "Save" to save the file to the desired location on a local computer or network drive. In the screen below, for example, the file is saved to the user's computer desktop.

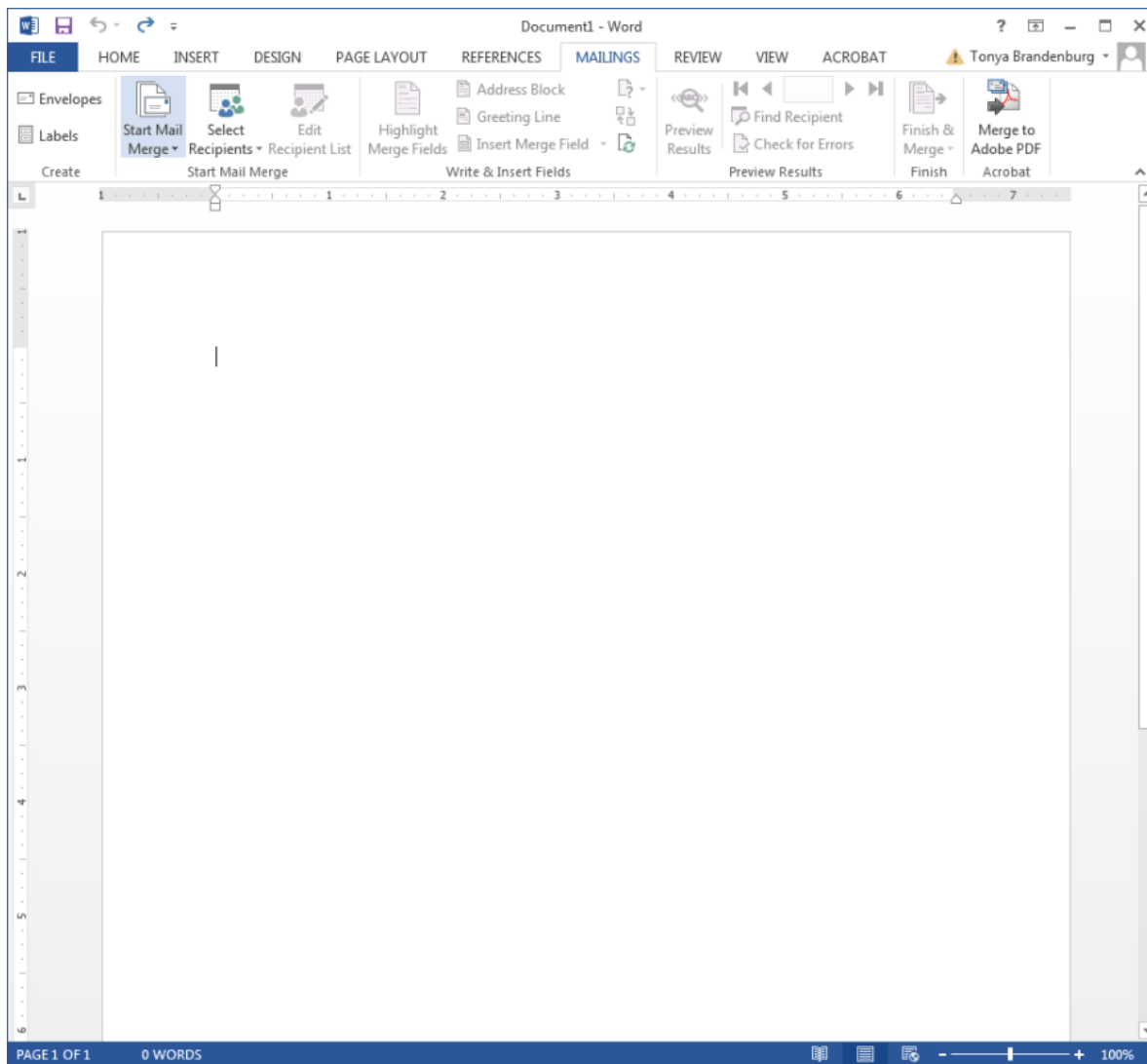


Once the file has been saved, open it in Excel. Now choose "Save As" from the "File" menu. In the dialog box that opens, click the arrow to the right of the "Save as type" drop-down menu at the bottom of the screen.

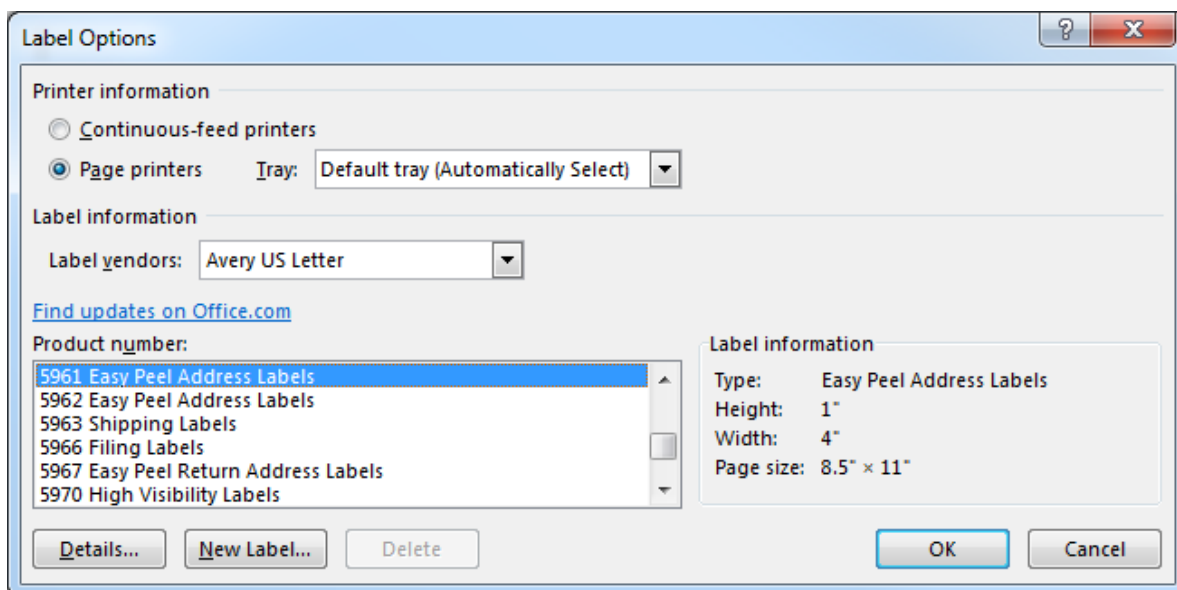
Choose Excel Workbook (scroll to the top of the list to see this option). The file name will now show the extension .xlsx. Click "Save."



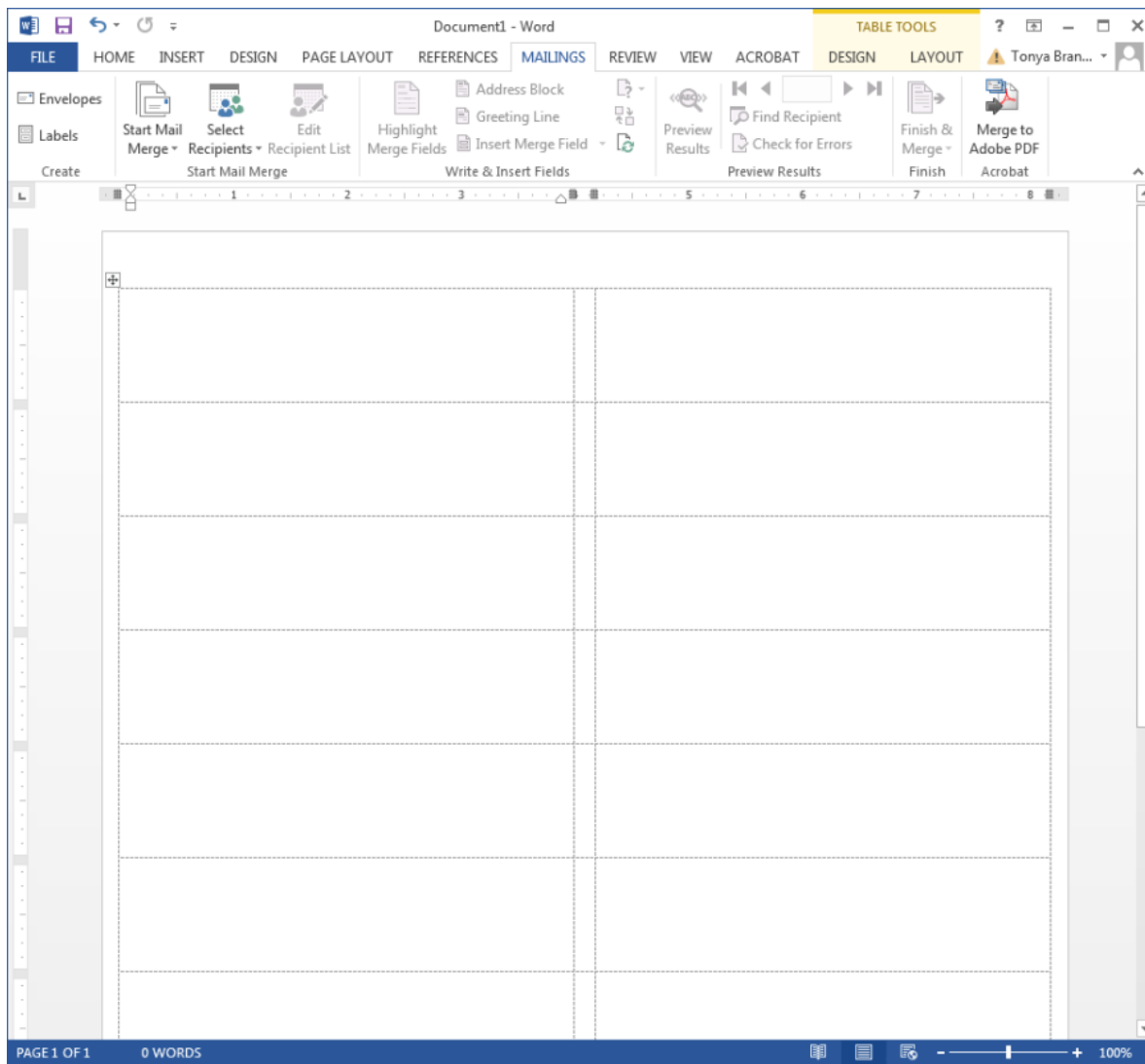
Now open Microsoft Word, go to the "Mailings" menu, and select "Start Mail Merge."



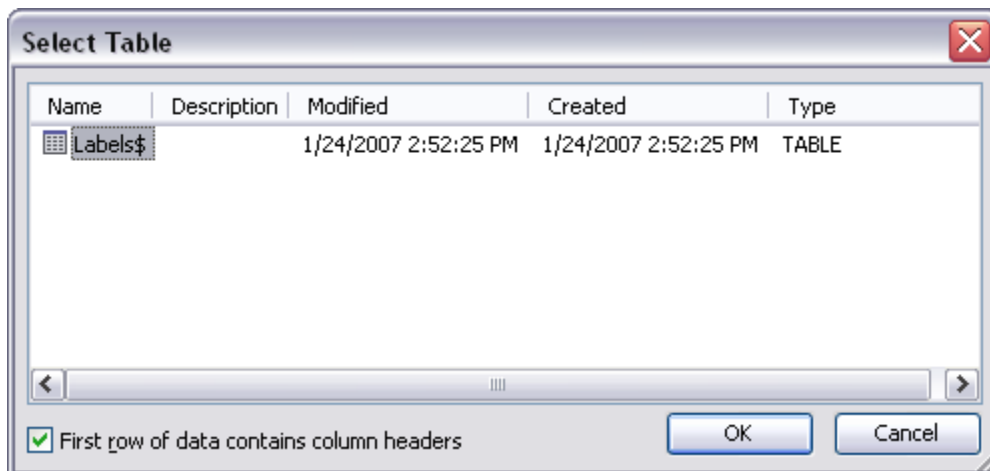
Under "Start Mail Merge," choose "Labels" and then click on "Ok" at the bottom right of the screen.



The following screen will now be displayed.



Under "Select Recipients" choose "Use an Existing list" selected. Click on the location where you saved your list and click "Open."
 Next the "Select Table" dialog box will appear. Click "Ok."



The following screen will then appear:

Document1 - Word

FILE HOME INSERT DESIGN PAGE LAYOUT REFERENCES MAILINGS REVIEW VIEW ACROBAT TABLE TOOLS DESIGN LAYOUT Tonya Bran...

Envelopes Labels Create

Start Mail Merge Select Recipients - Recipient List Start Mail Merge

Highlight Merge Fields Address Block Greeting Line Insert Merge Field Write & Insert Fields

Preview Results Find Recipient Check for Errors Preview Results

Finish & Merge - Finish Merge to Adobe PDF Acrobat

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

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To edit the recipient list, choose the "Edit Recipient List" option under the "Mailings" menu.

Mail Merge Recipients

This is the list of recipients that will be used in your merge. Use the options below to add to or change your list. Use the checkboxes to add or remove recipients from the merge. When your list is ready, click OK.

Data Source		ITEM1	ITEM2	ITEM3	ITEM4
Labels.xlsx	<input checked="" type="checkbox"/>	ABE, MOHAMMAD Z ...	Address1	Address2	HC
Labels.xlsx	<input checked="" type="checkbox"/>	ABE, MOHAMMAD Z ...	Testis 02/20/1997	REG ACC # : 19970695	BD
Labels.xlsx	<input checked="" type="checkbox"/>	SUSAN JACKSON	8 MEDICAL CIRCLE		GE
Labels.xlsx	<input checked="" type="checkbox"/>	ABE, MOHAMMAD P ...	Kidney 10/08/1999	REG ACC # : 19991125	BD
Labels.xlsx	<input checked="" type="checkbox"/>	LastName, FirstName	Address1	Address2	CR
Labels.xlsx	<input checked="" type="checkbox"/>	ABE, MOHAMMAD E ...	Liver 07/28/2000	REG ACC # : 20000403	BD
Labels.xlsx	<input checked="" type="checkbox"/>	ABE, MOHAMMAD I ...	Address1	Address2	LE
Labels.xlsx	<input checked="" type="checkbox"/>	ABE, MOHAMMAD I ...	Testis 02/15/2001	REG ACC # : 20010034	BD

Data Source: Labels.xlsx

Refine recipient list

- [Sort...](#)
- [Filter...](#)
- [Find duplicates...](#)
- [Find recipient...](#)
- [Validate addresses...](#)

Edit... Refresh

OK

Choose the "Insert Merge Field" and insert the items you want in the label.

Insert Merge Field

Insert:

☐ Address Fields ☒ Database Fields

Fields:

- ITEM1
- ITEM2
- ITEM3
- ITEM4
- ITEM5

Match Fields... Insert Cancel

You can match the fields with parts of the label as well.

?

X

Match Fields

In order to use special features, Mail Merge needs to know which fields in your recipient list match to the required fields. Use the drop-down list to select the appropriate recipient list field for each address field component

Unique Identifier	(not matched)
Courtesy Title	(not matched)
First Name	(not matched)
Middle Name	(not matched)
Last Name	(not matched)
Suffix	(not matched)
Nickname	(not matched)
Job Title	(not matched)
Company	(not matched)
Address 1	(not matched)
Address 2	(not matched)
City	(not matched)
State	(not matched)

Use the drop-down lists to choose the field from your database that corresponds to the address information Mail Merge expects (listed on the left.)

☐ Remember this matching for this set of data sources on this computer

OK

Cancel

Document1 - Word

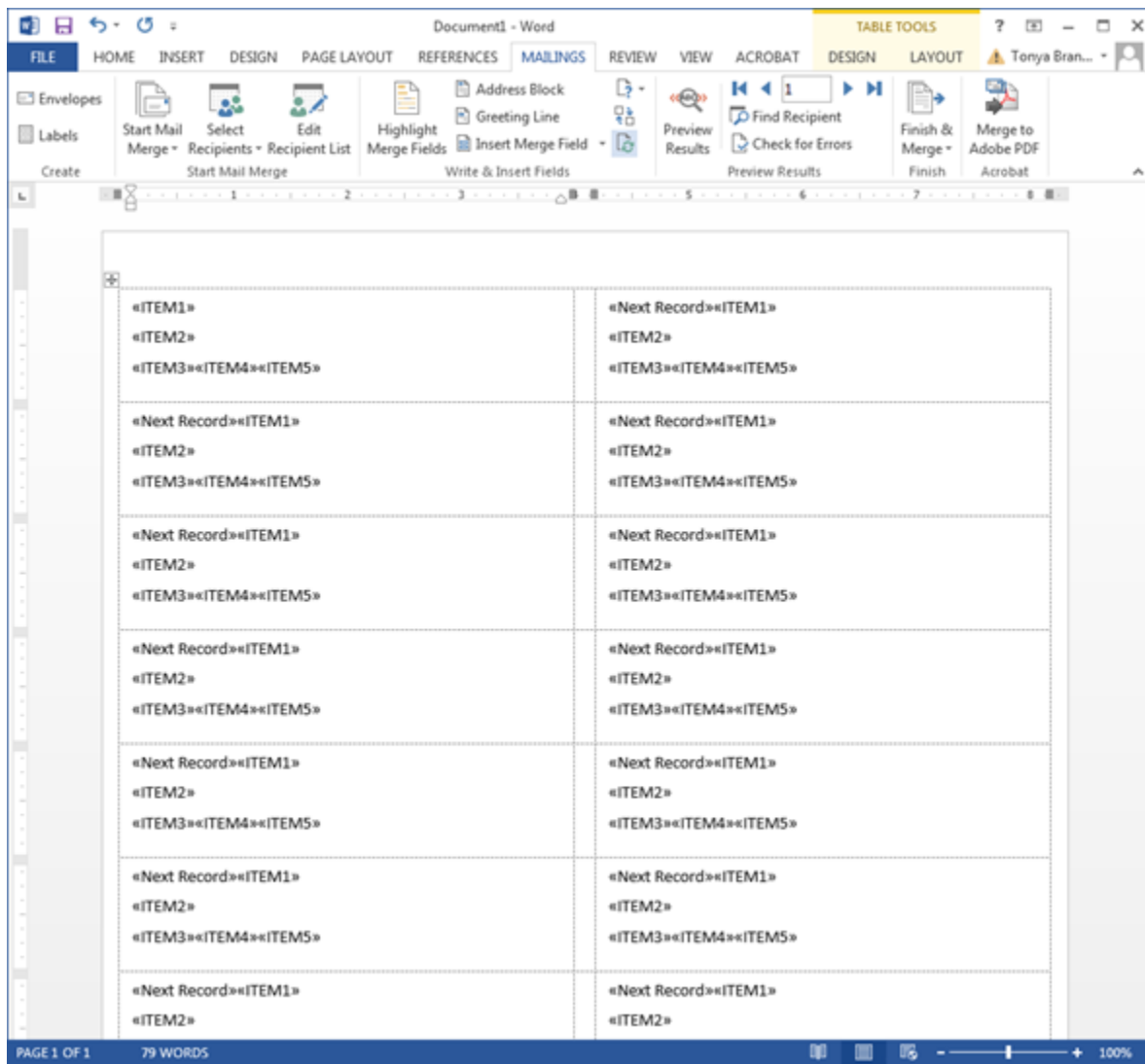
FILE HOME INSERT DESIGN PAGE LAYOUT REFERENCES MAILINGS REVIEW VIEW ACROBAT DESIGN LAYOUT Tonya Bran...

Envelopes Labels Start Mail Merge Select Recipients Edit Recipient List Highlight Merge Fields Address Block Greeting Line Insert Merge Field Write & Insert Fields Preview Results Find Recipient Check for Errors Preview Results Finish & Merge Merge to Adobe PDF

«ITEM1» «ITEM2» «ITEM3»«ITEM4»«ITEM5»	«Next Record»
«Next Record»	«Next Record»
«Next Record»	«Next Record»
«Next Record»	«Next Record»
«Next Record»	«Next Record»
«Next Record»	«Next Record»
«Next Record»	«Next Record»

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Now click on the "Update all labels" button below "Replicate Labels."



The following screen demonstrates that the layout of the first label has been duplicated in every label.

Document1 - Word

FILE HOME INSERT DESIGN PAGE LAYOUT REFERENCES MAILINGS REVIEW VIEW ACROBAT DESIGN LAYOUT Tonya Bran...

Envelopes Labels Start Mail Merge Select Recipients Edit Recipient List Highlight Merge Fields Address Block Greeting Line Insert Merge Field Preview Results Find Recipient Check for Errors Finish & Merge Merge to Adobe PDF

Create Start Mail Merge Write & Insert Fields Preview Results Finish Acrobat

«ITEM1» «ITEM2» «ITEM3»«ITEM4»«ITEM5»	«Next Record»«ITEM1» «ITEM2» «ITEM3»«ITEM4»«ITEM5»
«Next Record»«ITEM1» «ITEM2» «ITEM3»«ITEM4»«ITEM5»	«Next Record»«ITEM1» «ITEM2» «ITEM3»«ITEM4»«ITEM5»
«Next Record»«ITEM1» «ITEM2» «ITEM3»«ITEM4»«ITEM5»	«Next Record»«ITEM1» «ITEM2» «ITEM3»«ITEM4»«ITEM5»
«Next Record»«ITEM1» «ITEM2» «ITEM3»«ITEM4»«ITEM5»	«Next Record»«ITEM1» «ITEM2» «ITEM3»«ITEM4»«ITEM5»
«Next Record»«ITEM1» «ITEM2» «ITEM3»«ITEM4»«ITEM5»	«Next Record»«ITEM1» «ITEM2» «ITEM3»«ITEM4»«ITEM5»
«Next Record»«ITEM1» «ITEM2» «ITEM3»«ITEM4»«ITEM5»	«Next Record»«ITEM1» «ITEM2» «ITEM3»«ITEM4»«ITEM5»
«Next Record»«ITEM1» «ITEM2»	«Next Record»«ITEM1» «ITEM2»

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Once finished click on "Finish & Merge."

Document1 - Word

FILE HOME INSERT DESIGN PAGE LAYOUT REFERENCES MAILINGS REVIEW VIEW ACROBAT DESIGN LAYOUT Tonya Bran...

Envelopes Labels Start Mail Merge Select Recipients Edit Recipient List Highlight Merge Fields Address Block Greeting Line Insert Merge Field Write & Insert Fields Preview Results Find Recipient Check for Errors Preview Results Finish & Merge Merge to Adobe PDF Acrobat

«ITEM1» «ITEM2» «ITEM3»«ITEM4»«ITEM5»	«Next Record»«ITEM1» «ITEM2» «ITEM3»«ITEM4»«ITEM5»
«Next Record»«ITEM1» «ITEM2» «ITEM3»«ITEM4»«ITEM5»	«Next Record»«ITEM1» «ITEM2» «ITEM3»«ITEM4»«ITEM5»
«Next Record»«ITEM1» «ITEM2» «ITEM3»«ITEM4»«ITEM5»	«Next Record»«ITEM1» «ITEM2» «ITEM3»«ITEM4»«ITEM5»
«Next Record»«ITEM1» «ITEM2» «ITEM3»«ITEM4»«ITEM5»	«Next Record»«ITEM1» «ITEM2» «ITEM3»«ITEM4»«ITEM5»
«Next Record»«ITEM1» «ITEM2» «ITEM3»«ITEM4»«ITEM5»	«Next Record»«ITEM1» «ITEM2» «ITEM3»«ITEM4»«ITEM5»
«Next Record»«ITEM1» «ITEM2» «ITEM3»«ITEM4»«ITEM5»	«Next Record»«ITEM1» «ITEM2» «ITEM3»«ITEM4»«ITEM5»
«Next Record»«ITEM1» «ITEM2»	«Next Record»«ITEM1» «ITEM2»

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The labels are now ready to be printed. You can make any changes needed and then print when ready.

Labels2 - Word

FILE HOME INSERT DESIGN PAGE LAYOUT REFERENCES MAILINGS REVIEW VIEW ACROBAT DESIGN LAYOUT Tonya Bran...

Calibri (Body) 11 A A Aa B I U abc X, x' A ab A

Font Paragraph Styles Editing

Find Replace Select

Normal No Spac... Heading 1

<p>ABE, MOHAMMAD Z</p> <p>Address1</p> <p>Address2HOSKINSTON, KY 40844</p>	<p>ABE, MOHAMMAD Z</p> <p>Testis 02/20/1997</p> <p>REG ACC # : 19970695 SEQ # : 1BD: 07/01/1969 DLC: 06/21/2011</p>
<p>SUSAN JACKSON</p> <p>8 MEDICAL CIRCLE</p> <p>GEORGETOWN, KY 40324</p>	<p>ABE, MOHAMMAD P</p> <p>Kidney 10/08/1999</p> <p>REG ACC # : 19991125 SEQ # : 1BD: 08/27/1934 DLC: 04/04/2013MD: DOC3 JACKSON</p>
<p>LastName, FirstName</p> <p>Address1</p> <p>Address2CROPPER, KY 40057</p>	<p>ABE, MOHAMMAD E</p> <p>Liver 07/28/2000</p> <p>REG ACC # : 20000403 SEQ # : 1BD: 10/05/1953 DLC: 08/29/2000</p>
<p>ABE, MOHAMMAD I</p> <p>Address1</p> <p>Address2LEXINGTON, KY 40590</p>	<p>ABE, MOHAMMAD I</p> <p>Testis 02/15/2001</p> <p>REG ACC # : 20010034 SEQ # : 1BD: 05/13/1959 DLC: 09/05/2012</p>
<p>ABE, MOHAMMAD Z</p> <p>Address1</p> <p>Address2LOUISVILLE, KY 40253</p>	<p>ABE, MOHAMMAD Z</p> <p>Floor of mouth 07/10/2002</p> <p>REG ACC # : 20021400 SEQ # : 1BD: 05/05/1961 DLC: 12/28/2007</p>
<p>ABE, MOHAMMAD J</p> <p>Address1</p> <p>Address2GRAYSNOB, KY 40829</p>	<p>ABE, MOHAMMAD J</p> <p>Brain 01/14/2003</p> <p>REG ACC # : 20030020 SEQ # : 1BD: 09/06/1962 DLC: 11/08/2008</p>
<p>JONATHAN JOHNSON</p> <p>1485 MAIN ST</p>	<p>ABE, MOHAMMAD X</p> <p>Hypopharynx 04/01/2003</p>

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