

Creating Herbarium Labels with Mail Merge in Word

Mobilizing Small Herbaria for Digitization

Workshop sponsored by iDigBio, Florida State University, Tallahassee

December 9-11, 2013

Richard Carter, Curator of the Herbarium (VSC)

Phillip Lowe, Undergraduate Assistant

Biology Department

Valdosta State University

Valdosta, Georgia

Label Merge

- Label Merge enables pivoting between Specify 6 and MS Word from collection data in an Excel™ spreadsheet.

Excel spreadsheet with
specimen label data

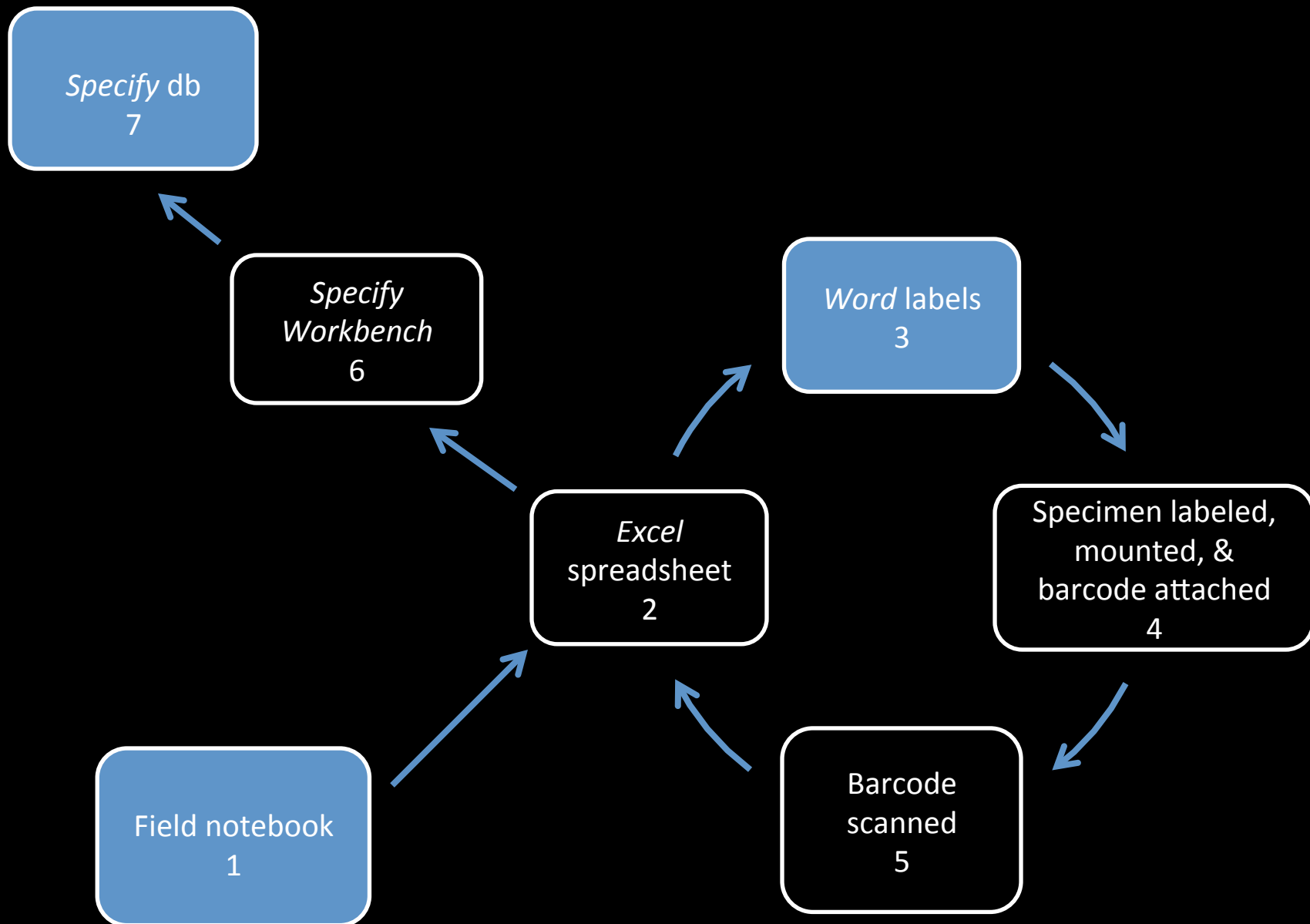


MS Word: efficient and easy
specimen label production

Specify 6 Workbench: efficient
and easy uploading of data

Label Merge

- Label Merge is an application of Microsoft Word Mail Merge™ that produces customized herbarium specimen labels in MS Word™ format, from data in an Excel spreadsheet.
- Once the specimens are labeled, mounted, and barcode labels attached, a barcode reader is used to beep the numbers into a designated field in an Excel spreadsheet.
- Using the Specify Workbench, the fields in the Excel spreadsheet are easily mapped with corresponding fields in the Specify database and the data uploaded into the database.



Excel spreadsheet with 43 columns

- #Labels Needed
- Catalog#
- Collection Date
- FirstName1
- MiddleName1
- LastName1
- Collection#
- Family
- Genus
- Species
- Authority
- Subsp
- SubspAuth
- Var
- VarAuth
- SynFamily
- SynGenus
- SynSpecies
- SynAuthority
- SynSubsp
- SynSubspAuth
- SynVar
- SynVarAuth
- Det. Note
- Country
- State
- County
- Latitude
- Longitude
- Locality
- Habitat
- AssociatedSpecies
- Comment
- FirstName2
- MiddleName2
- LastName2
- FirstName3
- MiddleName3
- LastName3
- DetFirstName
- DetMiddleName
- DetLastName
- DetDate

Flexible formatting of specimen labels

SIMAROUBACEAE

Leitneria floridana Chapman

U.S.A. GEORGIA. Dougherty County: N31.47369 W84.37551; Chickasawhatchee WMA, open pond and adjacent swamp forest; with *Taxodium ascendens*, *Gleditsia aquatica*, *Cephalanthus occidentalis*, *Rhynchospora careyana*, *Panicum hemitomon*, *Pontederia cordata*, *Nymphaea odorata*, *Nyssa aquatica*, *Quercus laurifolia*, *Acer rubrum*, *Styrax americana*, *Leucothoe racemosa*, *Rosa palustris*; shrub 1-2 (-3) m tall, locally common in standing water 7.5 dm deep (water temp. 38°F).

Richard Carter 19671
with W.W. Baker & P. Spivey
det. R. Carter

19 Feb 2010

Valdosta State University Herbarium (VSC)

Labelmerge

Search Labelmerge

OrganizeOpenShare withPrintE-mailBurnNew folder

Favorites

Desktop

Downloads

Recent Places

Libraries

Documents

Music

Pictures

Videos

Computer

Local Disk (C:)

Removable Dis

Network

IT04995

IT06569

IT06806

IT07181

IT07189

IT07572

IT08161

IT08202

IT09077

IT09078

IT09115

IT09171

IT09476

Name	Date modified	Type	Size
Label Merge Single	12/6/2013 3:49 PM	Microsoft Word Do...	68 KB
label template	10/4/2013 1:52 PM	Microsoft Excel Wor...	10 KB
label test	10/4/2013 1:50 PM	Microsoft Excel Wor...	16 KB
Protocol for coding label	10/4/2013 1:35 PM	Microsoft Word Do...	88 KB

Label Merge Single

Title: Add a title

Size: 67.1 KB

Tags: Add a tag

Content status: Add text

Pages: 1

Microsoft Word Document

Authors: herbvsc

Date modified: 12/6/2013 3:49 PM

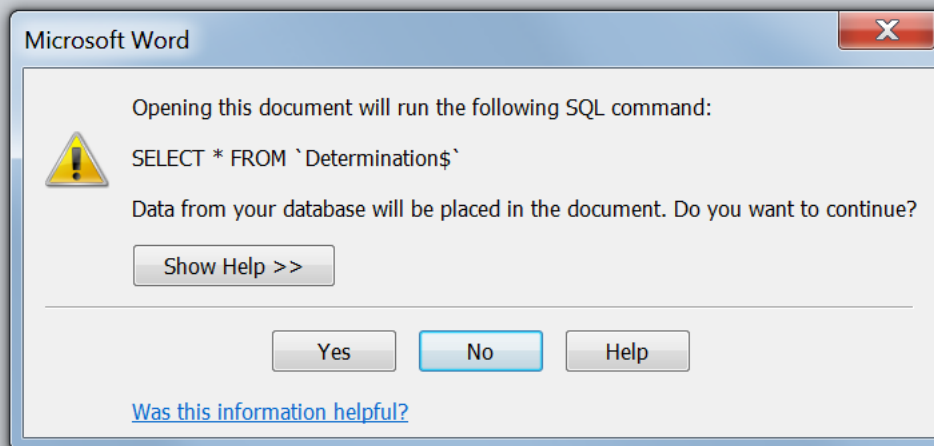
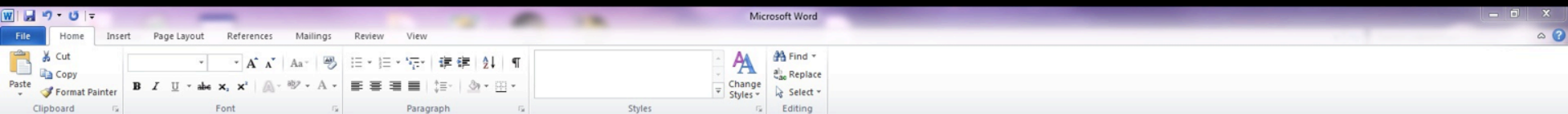
Categories: Add a category

Content type: Add text

Open the Label Merge Word document.

4:13 PM

12/6/2013



Select "No" on the prompt window.

Label Merge Single - Microsoft Word

File Home Insert Page Layout References Mailings Review View ABBYY FineReader 11 Acrobat

Calibri (Body) 10 A Aa [Font icons]

1 Normal 1 No Spaci... Heading 2 Title Subtitle Subtle Em... Emphasis Intense E... Strong Quote Intense Q... Subtle Ref... Intense R... Book Title [Style icons]

Find Replace Select Editing

APOCYNACEAE

Amsonia ciliata Walt.

U.S.A. GEORGIA. Telfair County: 31.82877N 82.9776W; 1.1 mi N Jacksonville by Hwy. US 319; sandy cut-over woods, elev. ca. 245 ft; many clumped stems from woody rootstock; corolla tube proximally slender and sky-blue, throat inflated and greenish, lobes bluish white.

Richard Carter 4727 12 Apr 1986
det. R. Carter, 1986
Valdosta State University Herbarium (VSC)

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Amsonia ciliata Walt.

U.S.A. GEORGIA. Telfair County: 31.82877N 82.9776W; 1.1 mi N Jacksonville by Hwy. US 319; sandy cut-over woods, elev. ca. 245 ft; many clumped stems from woody rootstock; corolla tube proximally slender and sky-blue, throat inflated and greenish, lobes bluish white.

Page: 1 of 1 Words: 354

120% 1:52 PM 12/6/2013

Move to the "Mailings" tab.

Label Merge Single - Microsoft Word

File Home Insert Page Layout References Mailings Review View ABBYY FineReader 11 Acrobat

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

Create

APOCYNACEAE

Amsonia ciliata Walt.

U.S.A. GEORGIA. Telfair County: 31.82877N 82.9776W; 1.1 mi N Jacksonville by Hwy. US 319; sandy cut-over woods, elev. ca. 245 ft; many clumped stems from woody rootstock; corolla tube proximally slender and sky-blue, throat inflated and greenish, lobes bluish white.

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Richard Carter 4727 12 Apr 1986
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Valdosta State University Herbarium (VSC)

Home Insert Page Layout References

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

Press the "Select Recipients" button.

Page: 1 of 1 Words: 354

1:53 PM 12/6/2013

Label Merge Single - Microsoft Word

File Home Insert Page Layout References Mailings Review Layout ABBYY FineReader 11 Acrobat

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

Create

Type New List...
Use Existing List...
Select from Outlook Contacts...

APOCYNACEAE

Amsonia ciliata Walt.

U.S.A. GEORGIA, Telfair County: 31.82877N 82.9776W; 1.1 mi N Jacksonville by Hwy. US 319; sandy cut-over woods, elev. ca. 245 ft; many clumped stems from woody rootstock; corolla tube proximally slender and sky-blue, throat inflated and greenish, lobes bluish white.

Richard Carter 4727
det. R. Carter, 1986

Valdosta State University Herbarium (VSC)

12 Apr 1986

Insert Page Layout References Mailings

Start Mail Merge Select Recipients Edit Recipient List Highlight Merge Fields Address Block

Type New List...
Use Existing List...
Select from Outlook Contacts...

APOCYNACEAE

Amsonia ciliata Walt.

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Richard Carter 4727
det. R. Carter, 1986

Valdosta State University Herbarium (VSC)

12 Apr 1986

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Amsonia ciliata Walt.

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Richard Carter 4727
det. R. Carter, 1986

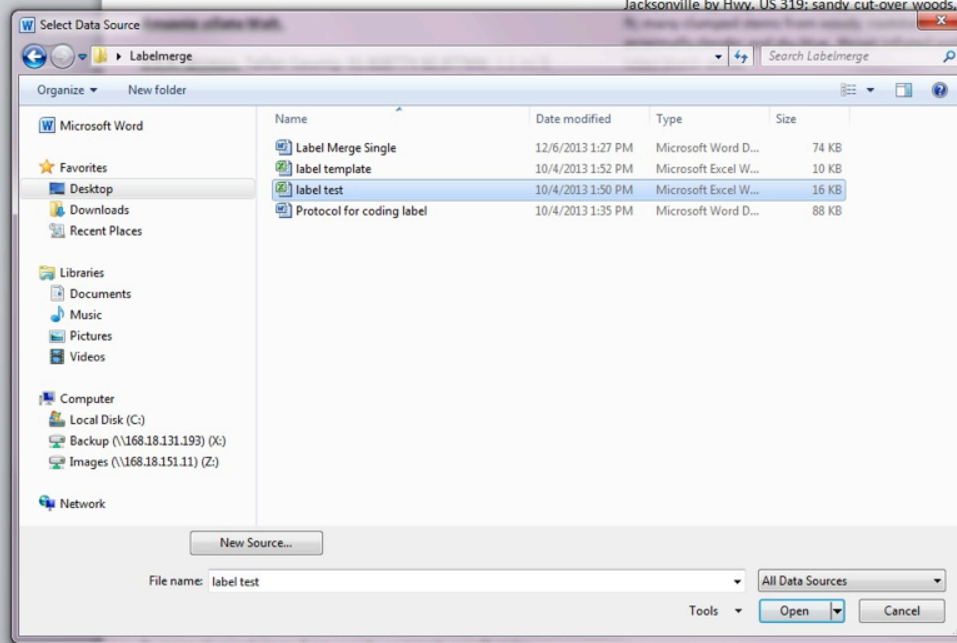
Valdosta State University Herbarium (VSC)

12 Apr 1986

Page: 1 of 1 Words: 354

1:54 PM 12/6/2013

Select "Use Existing List..." from the drop down list.



APOCYNACEAE

U.S.A. GEORGIA. Telfair County: 31.82877N 82.9776W; 1.1 mi N Jacksonville by Hwy. US 319; sandy cut-over woods, elev. ca. 245
a tube
greenish,

12 Apr 1986

1.1 mi N
elev. ca. 245
a tube
greenish,

12 Apr 1986

It; many crumpled stems from woody rootstock; corolla tube proximally slender and sky-blue, throat inflated and greenish, lobes bluish white.

Richard Carter 4727 12 Apr 1986
det. R. Carter, 1986
Valdosta State University Herbarium (VSC)

APOCYNACEAE

Amsonia ciliata Walt.

U.S.A. GEORGIA. Telfair County: 31.82877N 82.9776W; 1.1 mi N Jacksonville by Hwy. US 319; sandy cut-over woods, elev. ca. 245

Select the Excel document that contains your data.

APOCYNACEAE

Amsonia ciliata Walt.

U.S.A. GEORGIA. Telfair County: 31.82877N 82.9776W; 1.1 mi N Jacksonville by Hwy. US 319; sandy cut-over woods, elev. ca. 245 ft; many clumped stems from woody rootstock; corolla tube proximally slender and sky-blue, throat inflated and greenish, lobes bluish white.

Richard Carter 4727
det. R. Carter, 1986

12 Apr 1986

U.S.A. GEORGIA. Telfair County: 31.82877N 82.9776W; 1.1 mi N Jacksonville by Hwy. US 319; sandy cut-over woods, elev. ca. 245 ft; many clumped stems from woody rootstock; corolla tube proximally slender and sky-blue, throat inflated and greenish, lobes bluish white.

Richard Carter 4727
det. R. Carter, 1986

12 Apr 1986

Valdosta State University Herbarium (VSC)

APOCYNACEAE

Amsonia ciliata Walt.

U.S.A. GEORGIA. Telfair County: Jacksonville by Hwy. US 319; salsify; many clumped stems from w. proximally slender and sky-blue lobes bluish white.

Richard Carter 4727
det. R. Carter, 1986

Valdosta State University Herbarium (VSC)

APOCYNACEAE

Amsonia ciliata Walt.

U.S.A. GEORGIA. Telfair County: 31.82877N 82.9776W; 1.1 mi N Jacksonville by Hwy. US 319; sandy cut-over woods, elev. ca. 245 ft; many clumped stems from woody rootstock; corolla tube proximally slender and sky-blue, throat inflated and greenish, lobes bluish white.

Richard Carter 4727
det. R. Carter, 1986

12 Apr 1986

Valdosta State University Herbarium (VSC)

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Amsonia ciliata Walt.

U.S.A. GEORGIA. Telfair County: 31.82877N 82.9776W; 1.1 mi N Jacksonville by Hwy. US 319; sandy cut-over woods, elev. ca. 245

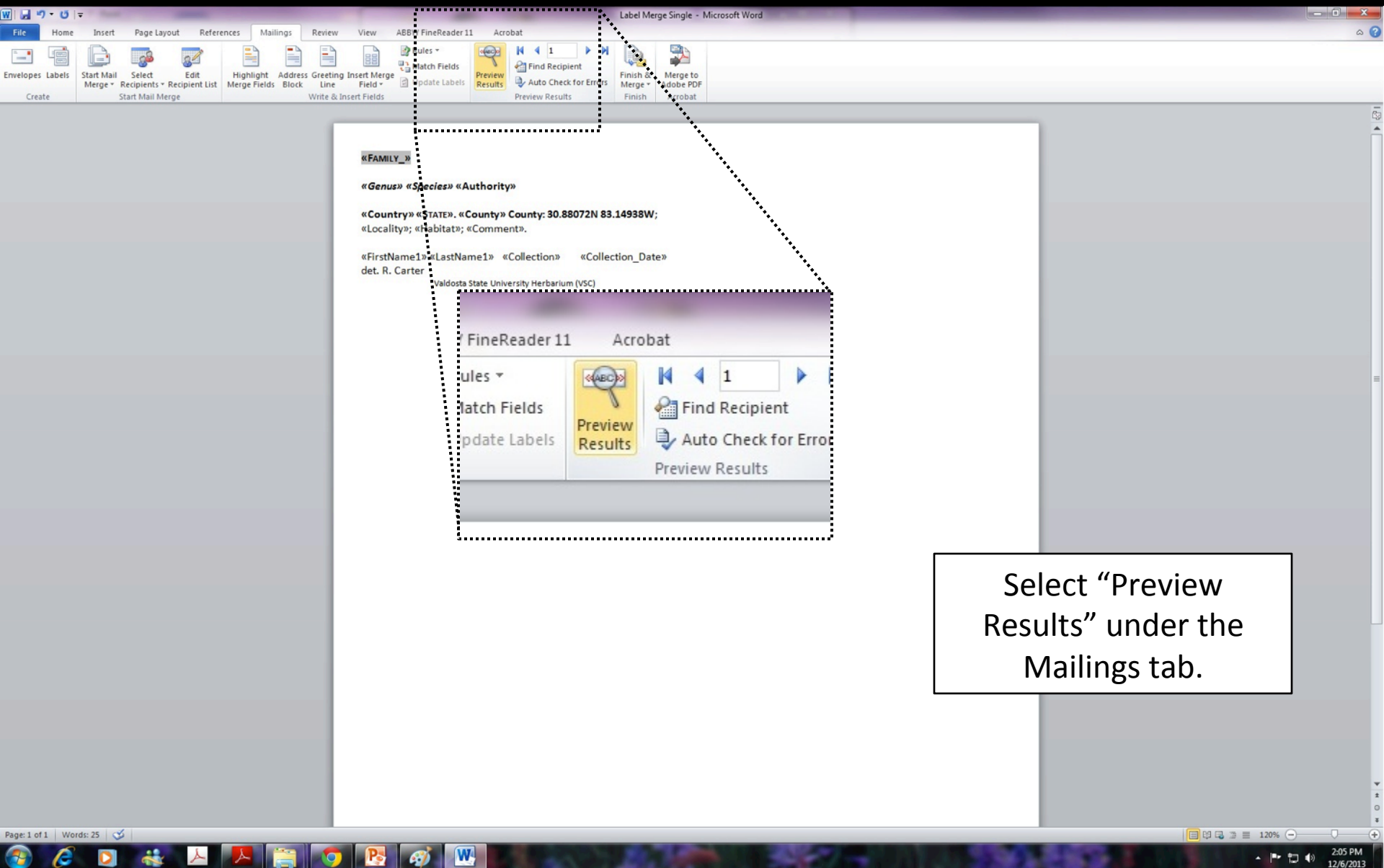
Select Table

Name	Description	Modified	Created	Type
Determinations		10/4/2013 12:52:24 PM	10/4/2013 12:52:24 PM	TABLE

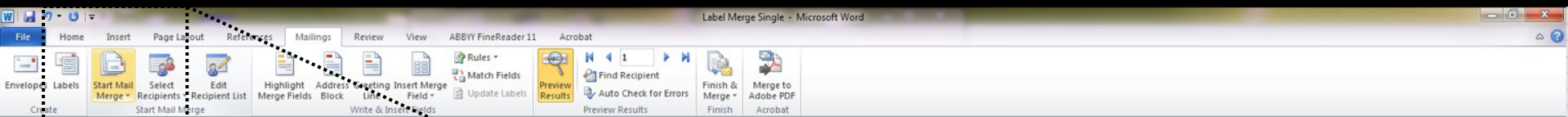
☒ First row of data contains column headers

OK Cancel

Select the Excel page
with your data.



Select "Preview Results" under the Mailings tab.

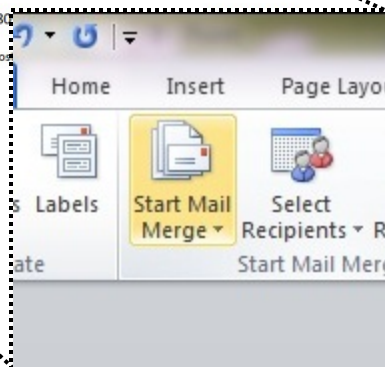


ASTERACEAE

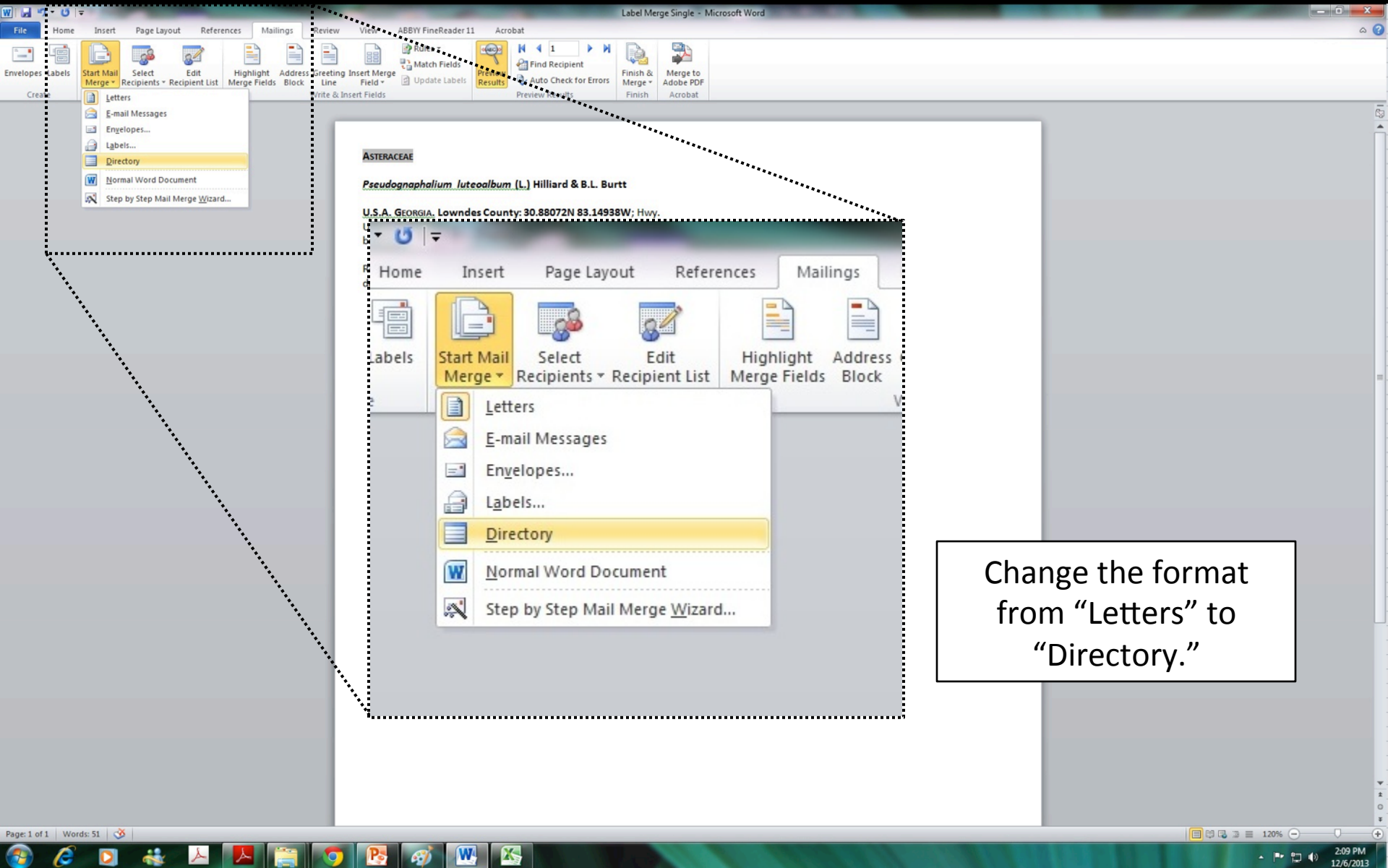
Pseudognaphalium luteoalbum (L.) Hilliard & B.L. Burt

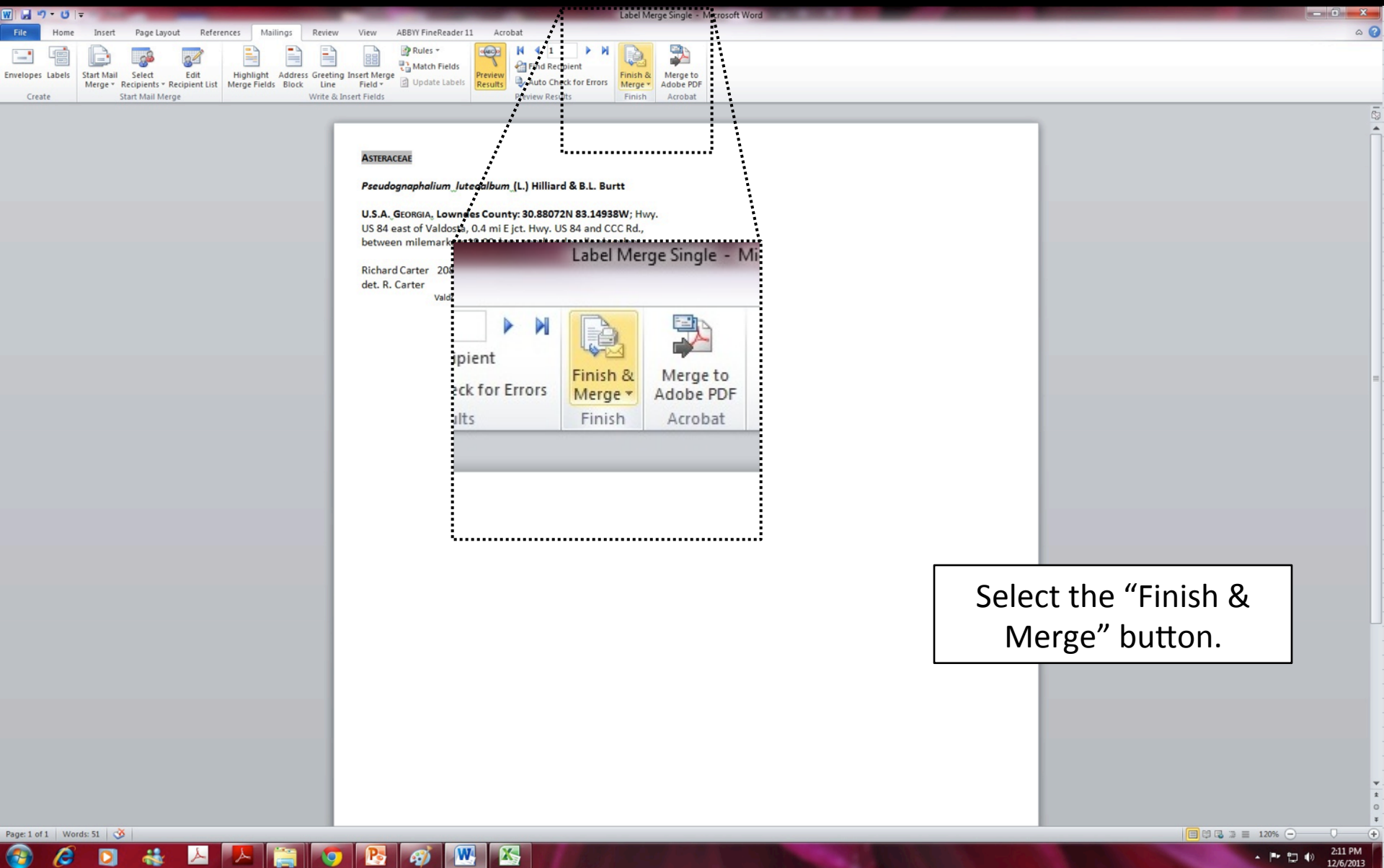
U.S.A. GEORGIA, Lowndes County: 30.88072N 83.14939W; Hwy.
US 84 east of Valdosta, 0.4 mi E jct. Hwy. US 84 and CCC Rd.,
between milemarkers 19-20; hwy. median; locally abundant.

Richard Carter 2080
det. R. Carter
Valdosta



Select the “Start Mail Merge” button.





Select the “Finish & Merge” button.

File Home Insert Page Layout References Mailings Review View ABBYY FineReader 11 Acrobat

Envelopes Labels Start Mail Merge Select Recipients Edit Recipient List Highlight Merge Fields Address Block Greeting Line Insert Merge Field Match Fields Preview Results Find Recipient Auto Check for Errors Preview Results

Create Start Mail Merge Start Mail Merge Start Mail Merge Write & Insert Fields Update Labels Preview Results Preview Results

Label Merge Single - Microsoft Word

Finish & Merge Merge to Adobe PDF

Edit Individual Documents... Print Documents... Send E-mail Messages...

ASTERACEAE

Pseudognaphalium luteoalbum (L.) Hilliard & B.L. Burt

U.S.A. GEORGIA, Lowndes County: 30.88072N 83.14938W; Hwy. US 84 east of Valdosta, 0.4 mi E jct. Hwy. US 84 and CCC Rd., between milemarkers 19-20. Flowers medium; locally abundant.

Richard Carter 20809
det. R. Carter
Valdosta State

Label Merge Single - Microsoft Word

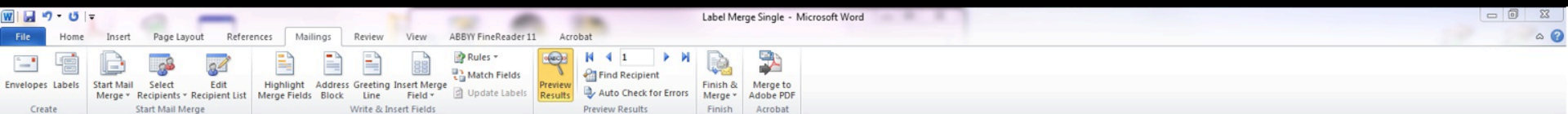
Finish & Merge Merge to Adobe PDF

Edit Individual Documents... Print Documents... Send E-mail Messages...

Page: 1 of 1 Words: 51

120% 2:13 PM 12/6/2013

Select "Edit Individual Documents" from the drop down list.



ASTERACEAE

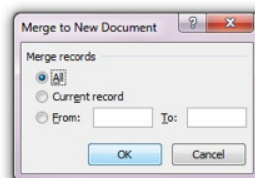
***Pseudognaphalium luteoalbum* (L.) Hilliard & B.L. Burt**

U.S.A. GEORGIA, Lowndes County: 30.88072N 83.14938W; Hwy.
US 84 east of Valdosta, 0.4 mi E jct. Hwy. US 84 and CCC Rd.,
between milemarkers 19-20; hwy. median; locally abundant.

Richard Carter 20809
det. R. Carter

15 May 2013

Valdosta State University Herbarium (VSC)



Press OK on the
prompt window.



ASTERACEAE

Pseudognaphalium luteoalbum (L.) Hilliard & B.L. Burt

U.S.A. GEORGIA, Lowndes County: 30.88072N 83.14938W; Hwy. US 84 east of Valdosta, 0.4 mi E jct. Hwy. US 84 and CCC Rd., between milemarkers 19-20; hwy. median; locally abundant.

Richard Carter 20809 15 May 2013
det. R. Carter
Valdosta State University Herbarium (VSC)

POACEAE

Polypogon viridis (Gouan) Breistr.

U.S.A. GEORGIA, Lowndes County: 30.88072N 83.14938W; Hwy. US 84 east side of Naylor, along south side of hwy; ditch; locally common.

Richard Carter 20810 15 May 2013
det. R. Carter
Valdosta State University Herbarium (VSC)

CYPERACEAE

Eleocharis montevidensis Kunth

Perianth bristles present!

U.S.A. GEORGIA, Lowndes County: 30.88072N 83.14938W; Hwy. US 84 east side of Naylor, along south side of hwy; ditch; locally common.

Richard Carter 20811 15 May 2013
det. R. Carter
Valdosta State University Herbarium (VSC)

CYPERACEAE

Carex fissa Mack. var. *aristata* Herm.

U.S.A. GEORGIA, Lowndes County: 30.88072N 83.14938W; Hwy. US 84 east side of Naylor, along south side of hwy; ditch; local, occasional, caespitose.

Richard Carter 20812 15 May 2013
det. R. Carter
Valdosta State University Herbarium (VSC)

ASTERACEAE

Gnomocharis chionesthes G.L. Nesom

U.S.A. GEORGIA, Lanier County: 30.93686N 83.009W; Stockton, jct. Hwy. US 84 and Hwy. US 129; poorly kept area adjacent to convenience store parking lot; locally common.

Richard Carter 20814 15 May 2013
det. R. Carter
Valdosta State University Herbarium (VSC)

ASTERACEAE

Hypochaeris glabra L.

U.S.A. GEORGIA, Lanier County: 30.93686N 83.009W; Stockton, jct. Hwy. US 84 and Hwy. US 129; poorly kept area adjacent to convenience store parking lot; locally common.

Richard Carter 20815 15 May 2013
det. R. Carter
Valdosta State University Herbarium (VSC)

ASTERACEAE

Hypochaeris glabra L.

U.S.A. GEORGIA, Lanier County: 30.93686N 83.009W; Stockton, jct. Hwy. US 84 and Hwy. US 129; poorly kept area adjacent to convenience store parking lot; locally common.

Richard Carter 20816 15 May 2013
det. R. Carter
Valdosta State University Herbarium (VSC)

ASTERACEAE

Facelis retusa (Lam.) Sch. Bip.

U.S.A. GEORGIA, Lanier County: 30.93686N 83.009W; Stockton, jct. Hwy. US 84 and Hwy. US 129; poorly kept area adjacent to convenience store parking lot; occasional, stems

Richard Carter 20817 15 May 2013
det. R. Carter
Valdosta State University Herbarium (VSC)

This will bring up a new window that has converted all of your data from the Excel document to auto-formatted text.

Excel spreadsheet columns are easily mapped to Specify fields through the Workbench.

- #Labels Needed
- Catalog#
- Collection Date
- FirstName1
- MiddleName1
- LastName1
- Collection#
- Family
- Genus
- Species
- Authority
- Subsp
- SubspAuth
- Var
- VarAuth
- SynFamily
- SynGenus
- SynSpecies
- SynAuthority
- SynSubsp
- SynSubspAuth
- SynVar
- SynVarAuth
- Det. Note
- Country
- State
- County
- Latitude
- Longitude
- Locality
- Habitat
- AssociatedSpecies
- Comment
- FirstName2
- MiddleName2
- LastName2
- FirstName3
- MiddleName3
- LastName3
- DetFirstName
- DetMiddleName
- DetLastName
- DetDate

Misc.

- Sort mounted specimens by collector and serial collection number to ensure seamless scanning of barcode numbers into the Excel spreadsheet.
- The Specify Names Table includes nomenclatural authorities: To avoid conflicts with the Specify Names Table, ignore nomenclatural authorities when mapping the Excel spreadsheet with the Specify Workbench.

The Label Merge protocol was developed by Phillip D. Lowe,
Undergraduate Herbarium Assistant, Valdosta State University
Herbarium (VSC), under the direction of Richard Carter, with support
from the National Science Foundation (DBI 1054366, J.R. Carter, PI).

