Two Birds with One Stone: Using Microsoft Excel® and Mail Merge® to Create Specimen Labels in Word® and Populate a Specify Database

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Label Merge

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

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 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.
Field notebook 1

Specimen labeled, mounted, & barcode attached 4

Barcode scanned 5

Word labels 3

Specify Workbench 7

Specify db 8

Excel spreadsheet 2/6
Field notebook 1

Excel spreadsheet 2/6

Barcode scanned 5

Specimen labeled, mounted, & barcode attached 4

Word labels 3

Specify Workbench 7

Specify db 8
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
[incl. Leitneriaceae]

*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
19 Feb 2010
det. R. Carter

Valdosta State University Herbarium (VSC)
Open the Label Merge Word document.
Select “No” on the prompt window.
Move to the “Mailings” tab.
Press the "Select Recipients" button.
Select "Use Existing List..." from the drop down list.
Select the Excel document that contains your data.
Select the Excel page with your data.
Select “Preview Results” under the Mailings tab.
Select the “Start Mail Merge” button.
Change the format from “Letters” to “Directory.”
Select the “Finish & Merge” button.
Select “Edit Individual Documents” from the drop down list.
Press OK on the prompt window.
This will bring up a new window that has converted all of your data from the Excel document to auto-formatted text.
• 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).