

## Southern Alberta Section – PES/IAS Chapter Creating Nametags for Chapter Events

### Before you begin:

The Nametags template was created for use with 2” tall x 4” wide mailing/shipping labels, 10 per sheet, which use Avery Template 5163.

Purchase labels based on the quantity required and the type of printer you will use:

| Part Number | Printer Type | Labels per package |
|-------------|--------------|--------------------|
| Avery 8923  | Inkjet       | 100 (10 sheets)    |
| Avery 8163  | Inkjet       | 250 (25 sheets)    |
| Avery 5263  | Laser        | 250 (25 sheets)    |
| Avery 5163  | Laser        | 1000 (100 sheets)  |

You will need :

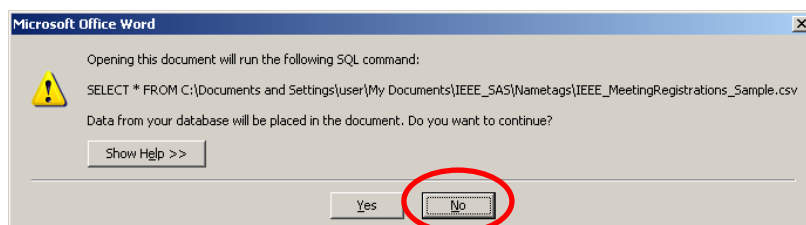
- the Word template “NametagsTemplate.docx”,
- an Excel file (\*.csv / \*.xls / \*.xlsx) containing the name data,
- labels (as specified above).

Clean up your Excel data file (remove totals, obvious duplicate entries, etc.) before creating the nametags.

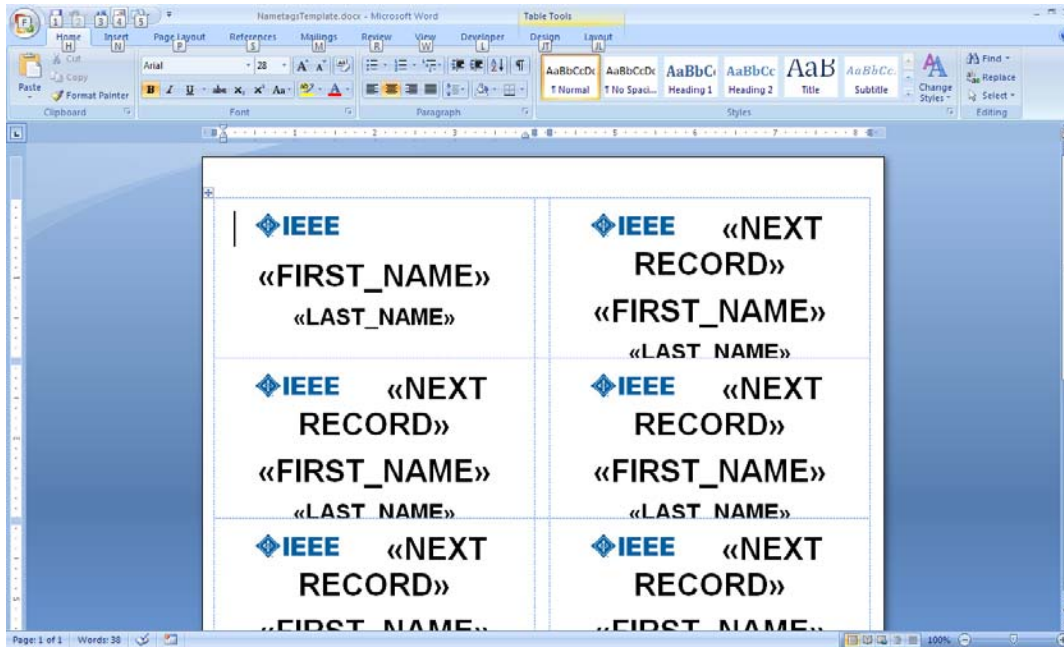
### Creating the nametags:

- 1 Open file “NametagsTemplate.docx”.

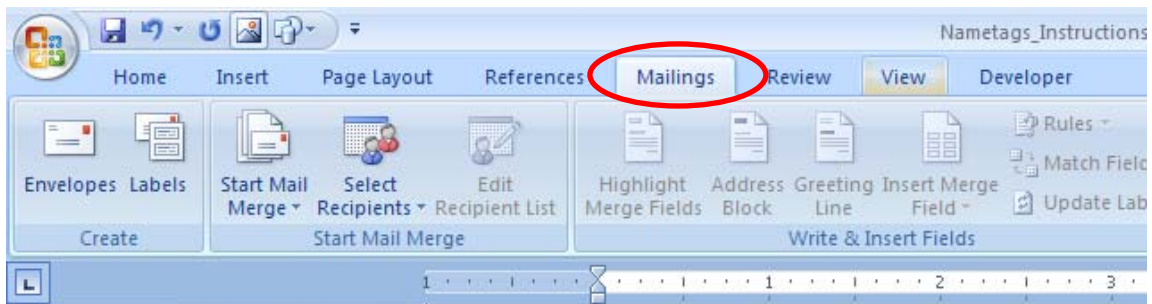
When you open the file, a warning message may appear. Click “NO”.



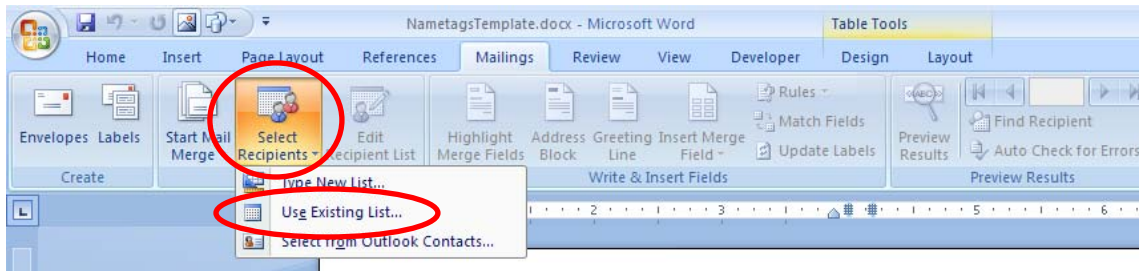
Once the template opens, it will look as follows:



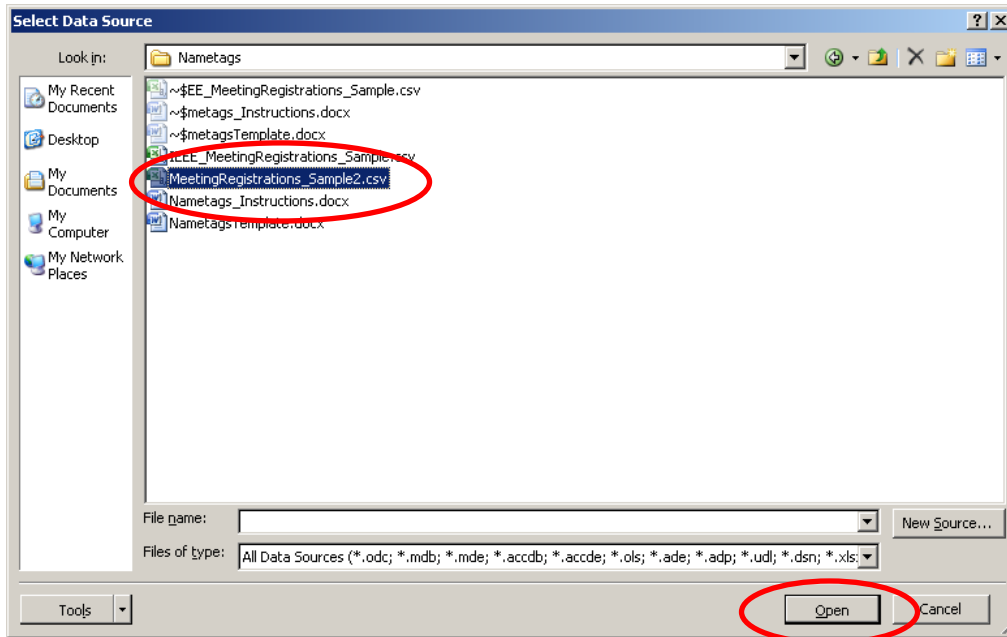
- 2 Select the "Mailings" menu.



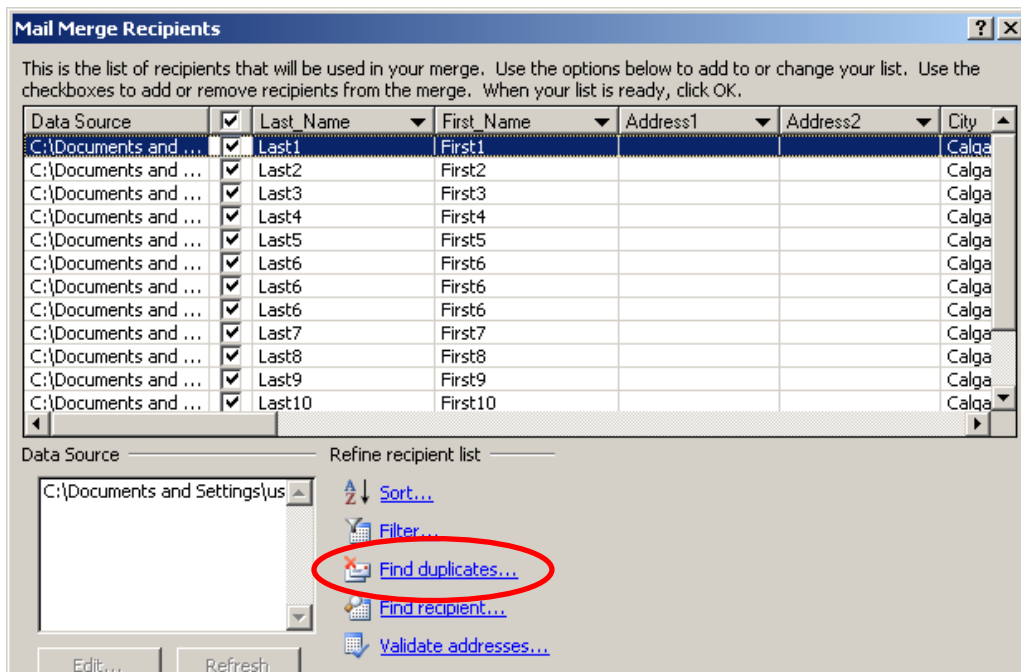
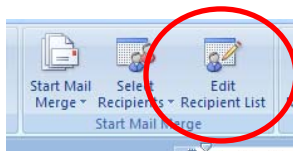
- 3 Click the "Select Recipients" drop-down sub-menu, and select "Use Existing List..."



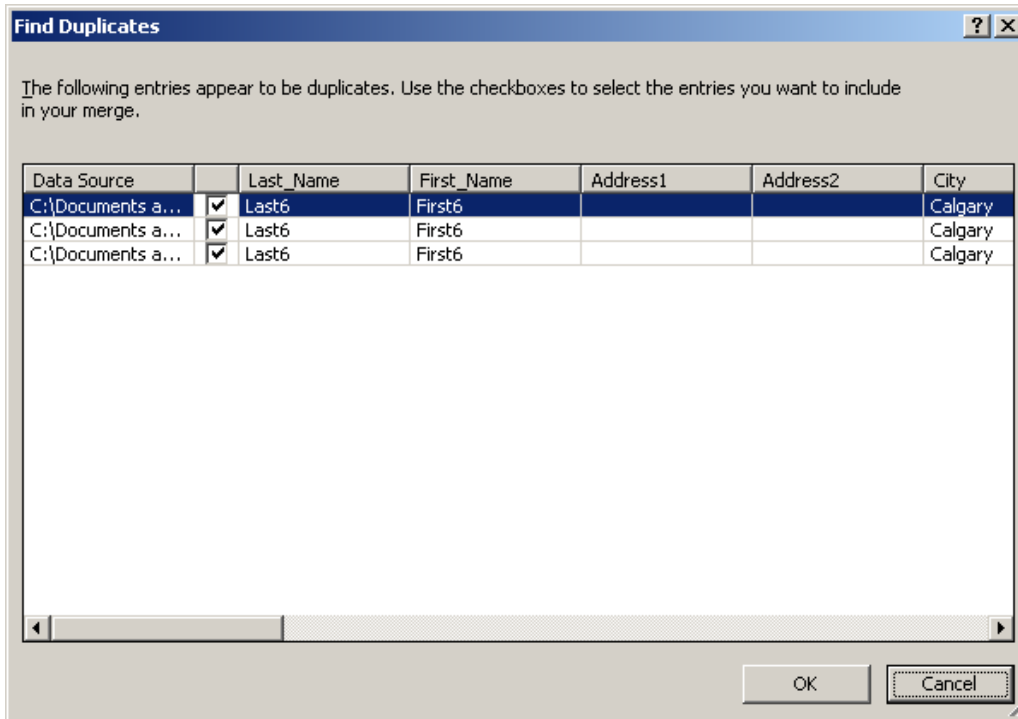
- 4 Select the file which contains the names data, and click “Open”.



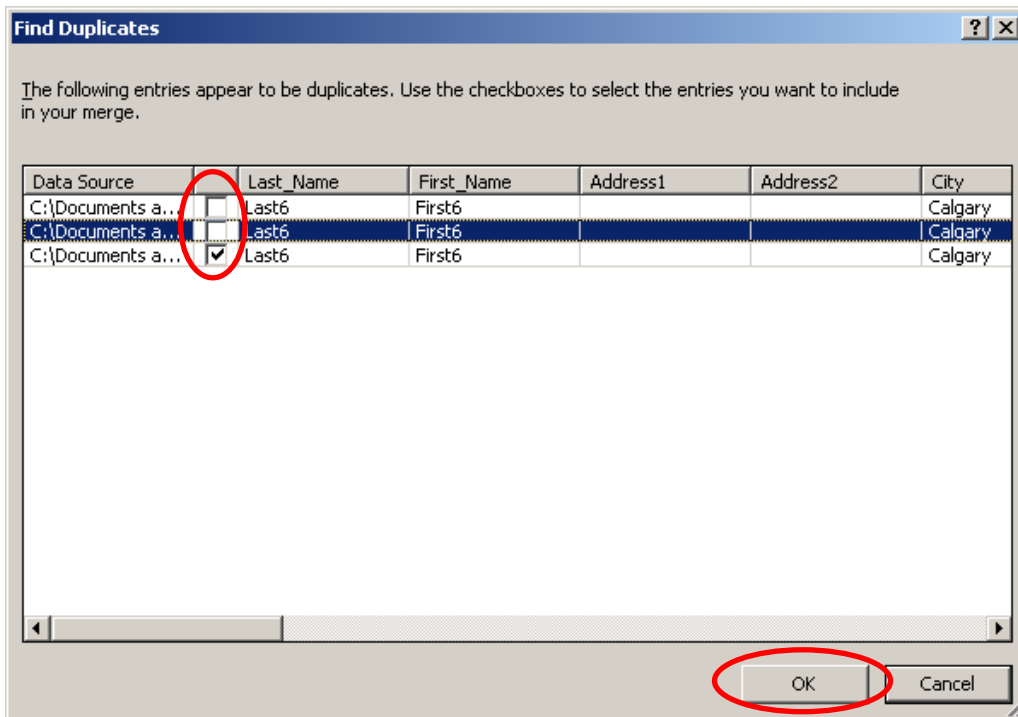
- 5 Click the “Edit Recipients List” button, and the following pop-up window opens. Click “Find duplicates...” within the pop-up window.



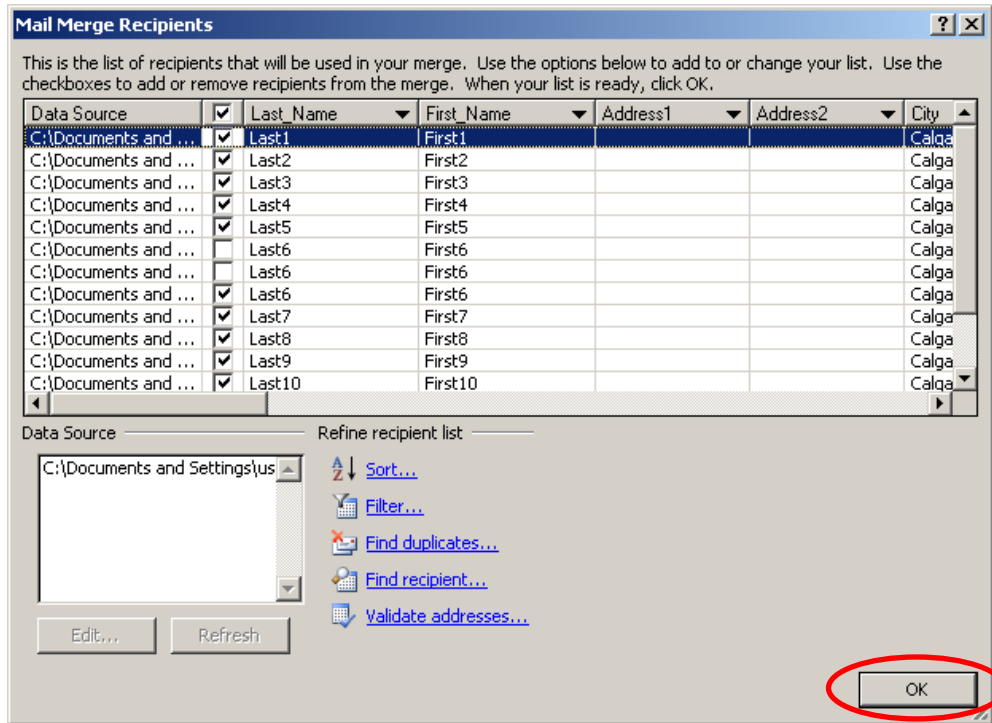
- 6 When duplicate entries are found, the following pop-up window opens, showing them:



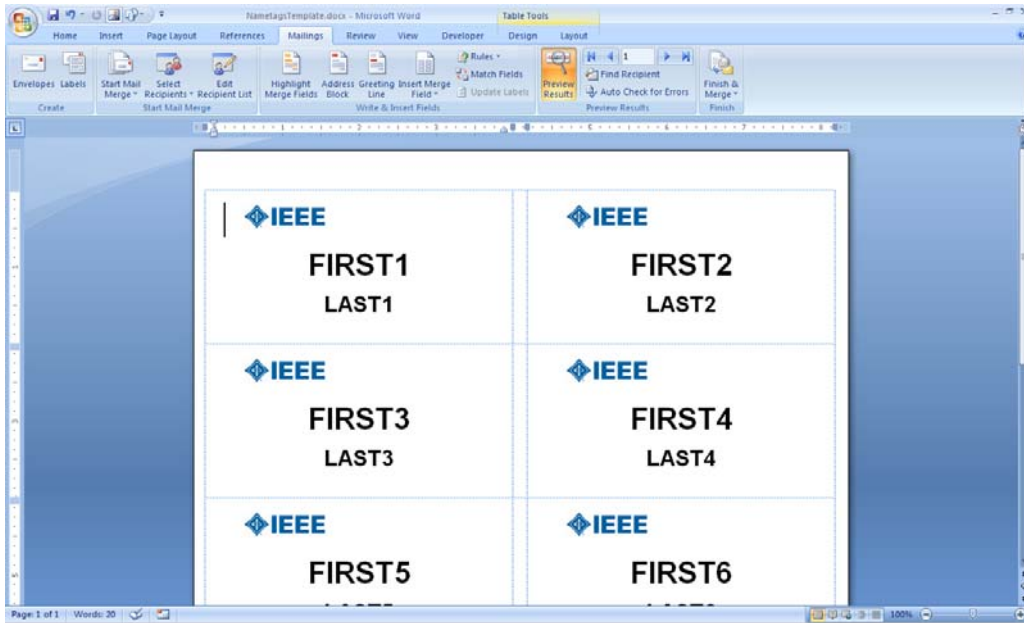
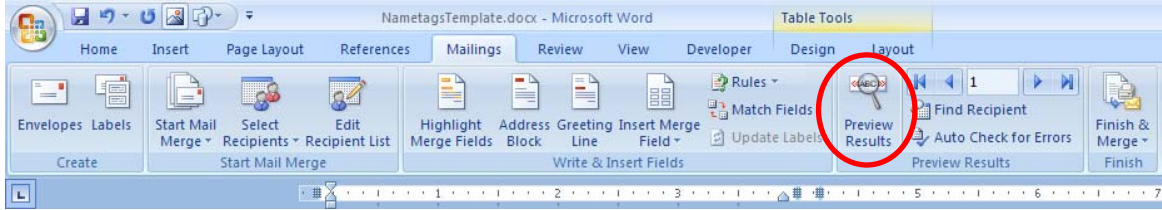
- 7 De-select the duplicates, so only 1 entry remains for each person, then click "OK".



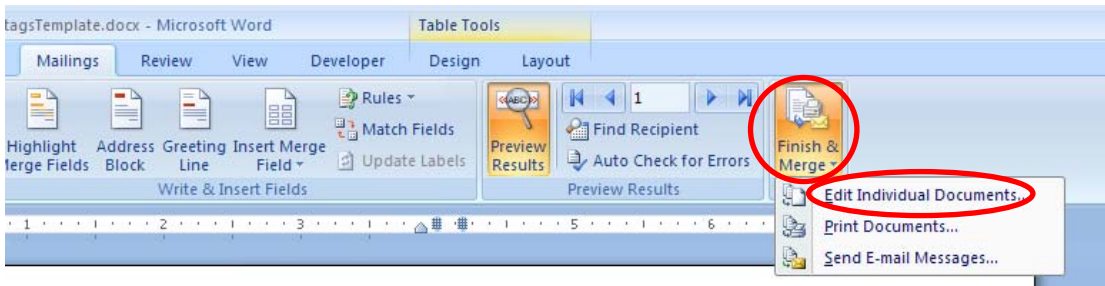
8 When the list has been updated, click “OK”, and the window will close.



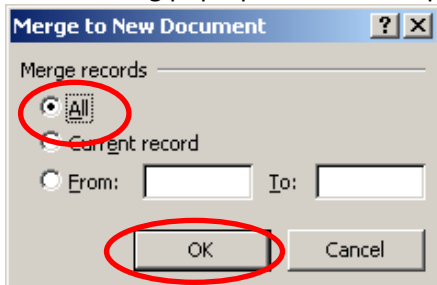
9 Click on the “Preview Results” button, and the names will be populated in to the template.



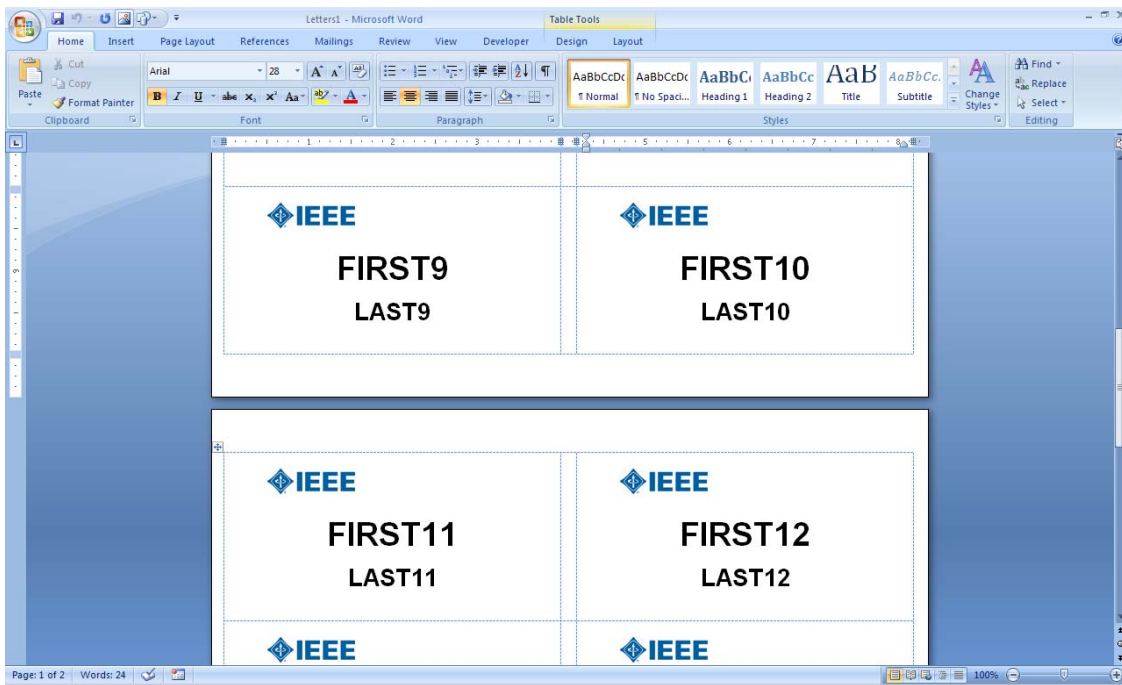
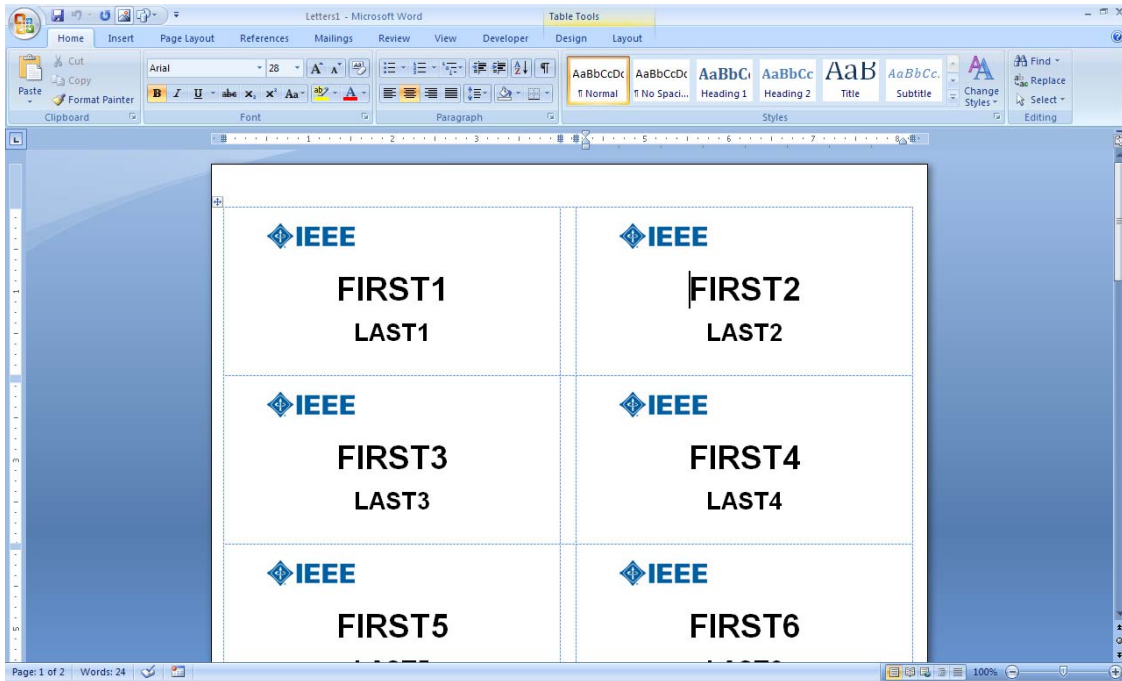
10 Click the “Finish & Merge” button, and select “Edit Individual Documents...”



11 The following pop-up window will open. Select the “All” radio button, and click “OK”.



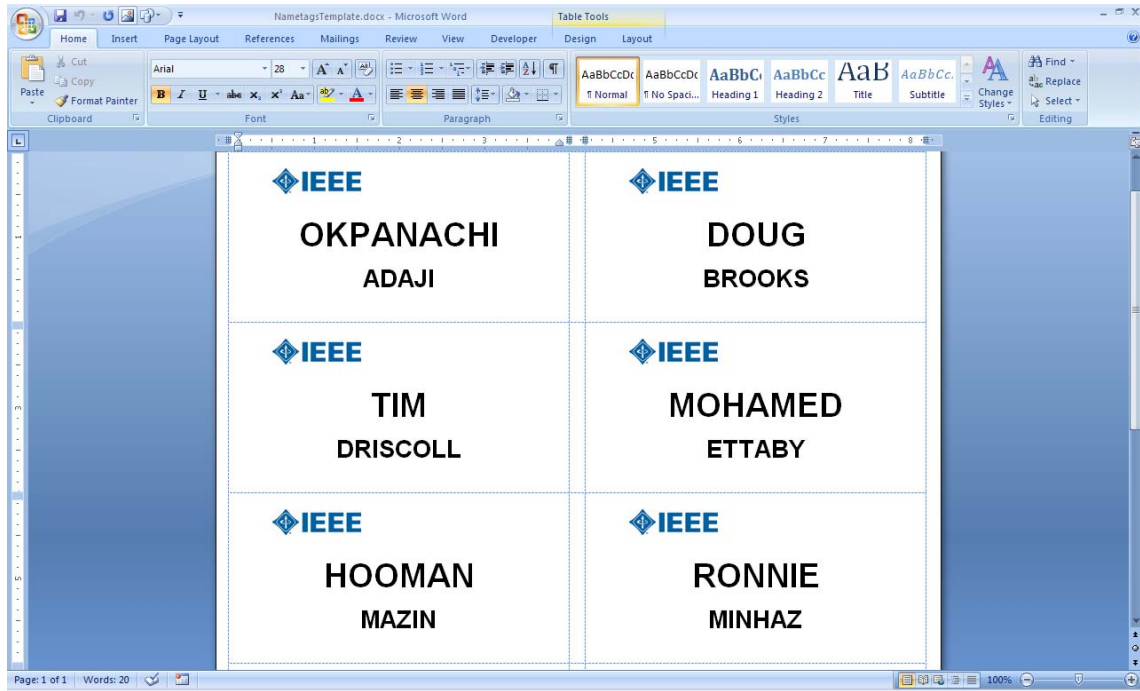
- 12 A new document will be opened, with a list of all the nametags, across multiple pages.



- 13 Save the new document, load the labels into the printer, and print this document.



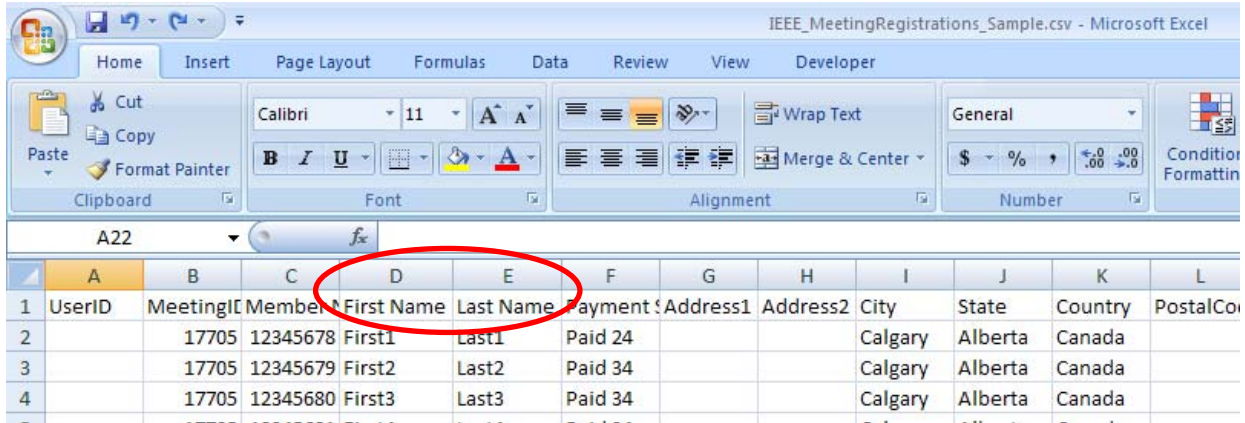
The "FIRST9" and "LAST9" shown in the examples are example data entries. Your final document will look something like this:





## Known Issues:

The Excel data file I used to create the template is the CSV file which is downloaded from vTools. The template looks for the first and last names in fields (columns) labeled “First Name” and “Last Name”.

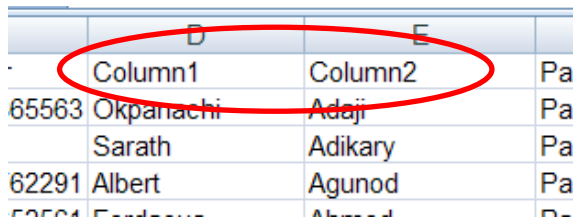


|   | A      | B         | C        | D          | E         | F       | G        | H        | I       | J       | K       | L          |
|---|--------|-----------|----------|------------|-----------|---------|----------|----------|---------|---------|---------|------------|
| 1 | UserID | MeetingID | MemberID | First Name | Last Name | Payment | Address1 | Address2 | City    | State   | Country | PostalCode |
| 2 |        | 17705     | 12345678 | First1     | Last1     | Paid 24 |          |          | Calgary | Alberta | Canada  |            |
| 3 |        | 17705     | 12345679 | First2     | Last2     | Paid 34 |          |          | Calgary | Alberta | Canada  |            |
| 4 |        | 17705     | 12345680 | First3     | Last3     | Paid 34 |          |          | Calgary | Alberta | Canada  |            |

If you are using a different file, your specific Excel file may contain the fields labeled differently. You have 2 choices:

1. Copy your data into the “Sample.csv”.
  - a. Delete the example data (Row 2 and onward – do not delete Row 1).
  - b. Copy the First Names into Column “D”, and the Last Names into Column “E”.
  - c. Save and close the Sample.csv file, and use it.
2. Adapt the template to use your spreadsheet/CSV file:

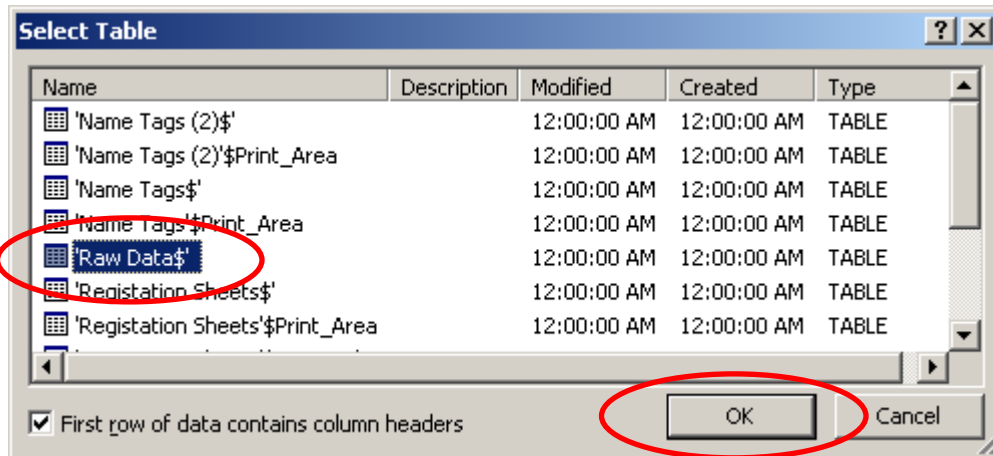
In this example, the First Names are contained in a field labeled “Column1”, and Last Names are in a field labeled “Column2”.



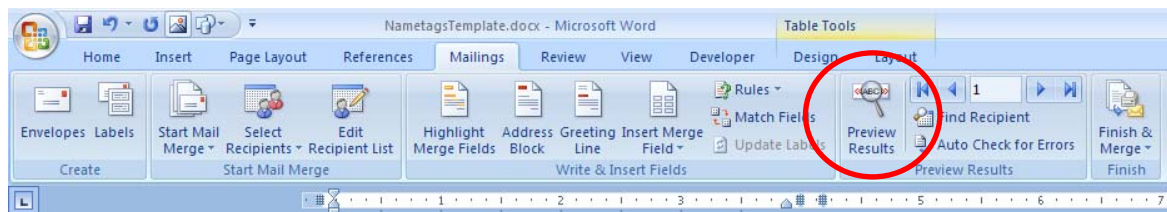
|       | D         | E       |    |
|-------|-----------|---------|----|
|       | Column1   | Column2 | Pa |
| 65563 | Okpanachi | Adaji   | Pa |
|       | Sarath    | Adikary | Pa |
| 62291 | Albert    | Agunod  | Pa |
| 50504 | Fardeen   | Abbas   | Pa |

## Adapting the template to use your data file:

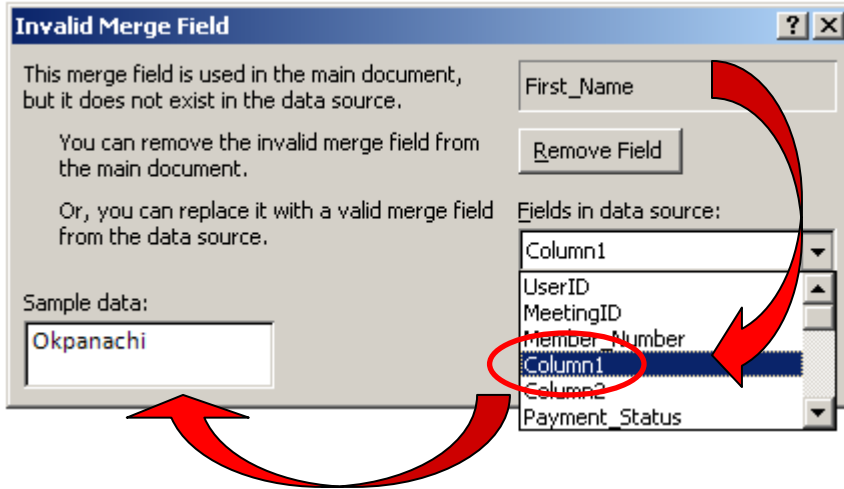
- A Follow steps 1-4 as listed above.
- B Select the “sheet” or “tab” that contains your data, and click “OK”.



- C Click the “Preview Results” button.



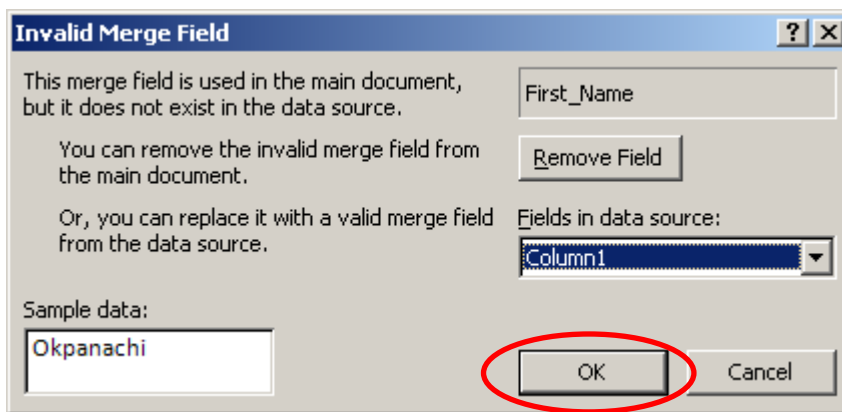
D An “Invalid Merge” pop-up window will appear:



Select the field label corresponding to the “First Name”. In this example, it is “Column1”.

The “Sample data” will be populated with a preview.

Click “OK”:



E Repeat this procedure for the “Last Name”, “Column2” in this example.

F You will have to repeat this replacement procedure 9 times (for a total of 10 “First Name” replacements, and 10 “Last Name” replacements).

G Once the replacements are complete, resume the instructions at Step 5.