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Connections

August 2001

The Newsletter for Lab Manager Users

Technical Tips

Sharing Lab Manager Data with Other Programs

Did you know that Lab Manager makes it easy to share it's data with other programs like Microsoft® Word, Excel, and Publisher? This article demonstrates how easy it is to create custom reports, mailing labels, name tags and other things using Microsoft® Publisher using information from Lab Manager.

While my example will show how to create a custom mailing label, this process can be used to create all types of documents like name tags, custom shipping labels, custom QC forms, flyers, advertising, marketing and sales letters, all with Lab Manager information automatically merged exactly where you want it.

Begin by starting Microsoft Publisher. As a default, Publisher starts by showing the "Catalog". In the catalog, under Wizards, choose "Labels" and then choose the size of label you want. In this example, I selected the Avery 5160 label and then clicked on the **Start Wizard** button.

If the "Catalog" is not displayed when you first start Publisher, you can display it by clicking on **File** in the upper left corner of the screen and then click on **New**.

Publisher will then start creating the Label document for you. During the process,

Publisher might ask some questions. The first question I was asked was about filling in the name and address information for me to which I simply clicked **OK** and then **Cancel** at the following screen because I want to do it myself.

Next, click on **Finish** (to finish the wizard) and click on **Hide Wizard** to clean up the screen. You should see a label on the screen that looks something **Figure 1**.

Figure 1

Mailing Address Line 1
Mailing Address Line 2
Mailing Address Line 3
Mailing Address Line 4
Mailing Address Line 5

This label is ready to print onto Avery Label #5160.

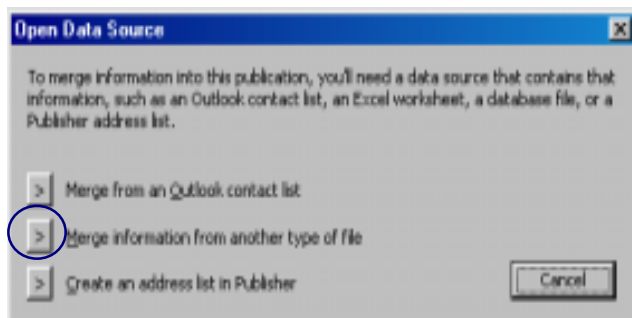
The next thing we need to do is delete the text "Mailing Address Line 1" through line 5 from the label. To do that, click on the text and you will notice that it turns black. Once it is highlighted, press the delete key on the keyboard. Now the label should be empty. You can ignore the box below the label identifying the Avery Label number.

Selecting the Data

The next step is to tell Publisher where to find the Lab Manager data. To do this, click on Mail Merge at the top of the screen. If the Mail Merge option has not yet been installed, you will be prompted to insert the CD containing Microsoft Publisher so that those functions can be installed.

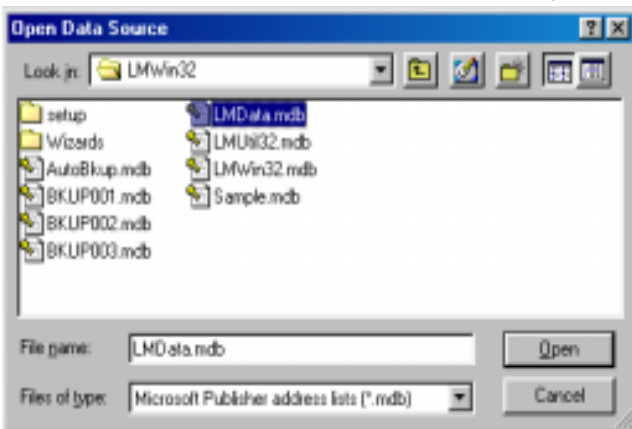
After clicking on **Mail Merge**, click on **Open Data Source**. You should see a window something like **Figure 2**.

Figure 2



Click on the middle item; “**Merge information from another type of file**”. This will display the Open Data Source window as shown in **Figure 3**.

Figure 3



Use this window to locate your Lab Manager data file. Click on the “drop down list” button in the **Look in** window to select drive C: (or whatever drive your data is in) and then in the larger window locate the LMWin32 folder. If your Lab Manager data is in LMDData.mdb (as is the default) then you should be able to see that file in the larger window as shown in **Figure 3**. Click on LMDData.mdb to select the file and then click on the **Open** button. If your data is in a different file, be sure to choose your data file.

Adding Fields to the Label

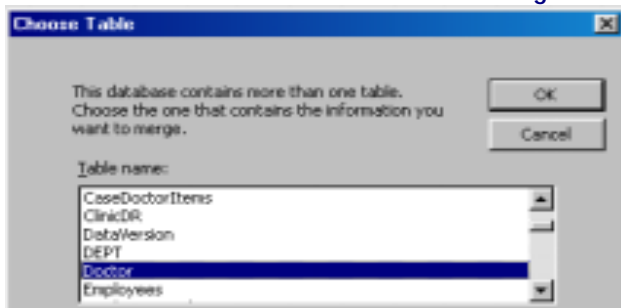
The next window (see **Figure 4**) to appear lists all of the tables or groups of data in the data file you selected. The table we want is the Doctor or Marketing table. Scroll down until you see **Doctor** and then click on it and then click on the **OK** button.

The next window to appear shows all of the fields in that table. This is where we will be selecting the name and address fields we will be using on the label. Before we can do this, however, we need to select the label frame into which we will be placing this information. This frame should still be on the screen and looks like the mailing label you chose earlier. Click anywhere inside that label.

After you do that, you should see a cursor flashing inside the label frame. Now, we are ready to insert the needed fields from the Lab Manager table. Scroll through the list of fields to find **AccountName** and click on it. Next, click on the **Insert** button. You will notice that the Account name field will appear inside the label frame. Press the **ENTER** key to move the cursor to the next line on the label and then move your mouse back to the box listing all of the field names. Locate the **Address** field, click on it and then click on the **Insert** button to add the address field to the label. Press the **ENTER** key to move the cursor down to the next line on the label.

Move the cursor back to the Insert Field window and locate and click on the **City** field and then click on the **Insert** button. Press the **SPACE BAR** instead of the enter key and then go back to the Insert Field window and click on **State** and insert. Press the **SPACE BAR** and then click on **Zip** and then on **Insert**.

Figure 4



After selecting all of the fields we want to insert onto our label, we can now click on the **Close** button on the Insert Field window. You should now see something on the screen like **Figure 5**. Your mailing label is now complete,

Figure 5

«Account Name»
«Address»
«City» «State» «Zip»

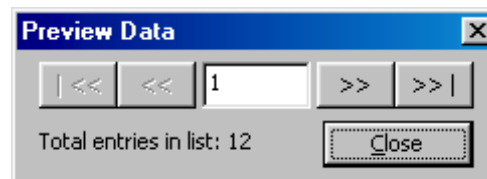
This label is ready to print onto Avery Label #5160.

all that is left to do is merge the data into the fields you have defined and print.

Merging Your Data

To merge your Lab Manager data into the label you just defined, start by clicking on the **Mail Merge** menu option at the top of the screen and then click on **Merge**. A small **Preview Data** window will appear on the screen like the one shown in **Figure 6**.

Figure 6



Slide the Preview Data window to the side so it does not cover the mailing label you defined and you see the label now has the name and address of your first account.

Use the >> and << buttons in the **Preview Data** window to move forward and backwards through the names if you want to see how they will look when printed. **Figure 7** shows an example of a merged name on the label.

Figure 7

Dr. John Smith
1234 N. 10th St.
Phoenix AZ 85016

This label is ready to print onto Avery Label #5160.

If a name is too long for the label, you can change the font or the size of the font in the label, just like with any word processor, to allow for larger names. When you are ready to print, click on **File** at the top left corner of the screen and then click on **Print Merge**.

Think of the possibilities! You can now apply this technique to almost any data in Lab Manager and print it on most any size or shape document. You could even merge names and address to documents like this newsletter if you wanted to.

Don't know how to use Publisher, Word, or Excel? Then you need the Microsoft® Office video tape training series that we offer below. Each video tape will help you understand and use these programs in less time than it takes to read each manual. PLUS you save 50% off the 4 tape video tape training series, but only while supplies last. When they're gone... they're gone.

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