


# Automating Container Lists with Word/Excel

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# Use Auto-fill Smartly

- Place the same value in two different rows, select the two cells, and drag the bottom-right corner down as many rows as you need that value.

	A	B	C	D	E	F
1	Box	Folder	Date	Normal	Description	
2	1					
3	1					
4						
5						
6						

	A	B	C	D	E
1	Box	Folder	Date	Normal	Description
2	1				
3	1				
4	1				
5	1				
6	1				
7	1				
8	1				
9	1				
10	1				
11	2				
12	2				
13	2				
14	2				
15	2				
16	2				

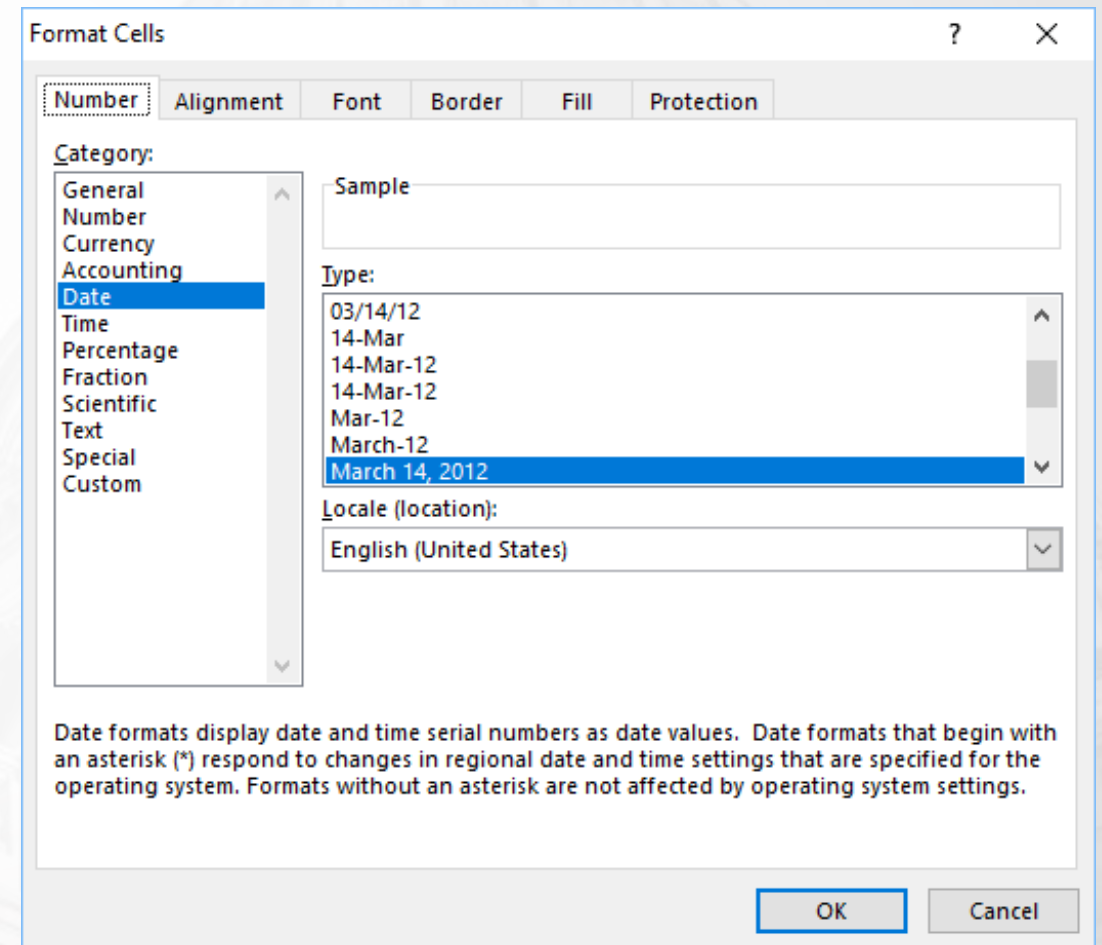
# Excel Remembers Patterns

- You may also auto-increment values. Place a value in the top cell, increment the next row by 1 (or other pattern), select the two cells, and drag them down.

	A	B	C	D	E
1	Box	Folder	Date	Normal	Description
2	1	1			
3	1	2			
4	1	3			
5	1	4			
6	1	5			
7	1	6			
8	1	7			
9	1	8			
10	1	9			
11	2	1			
12	2	2			
13	2				
14	2				
15	2				
16	2				
17	2				

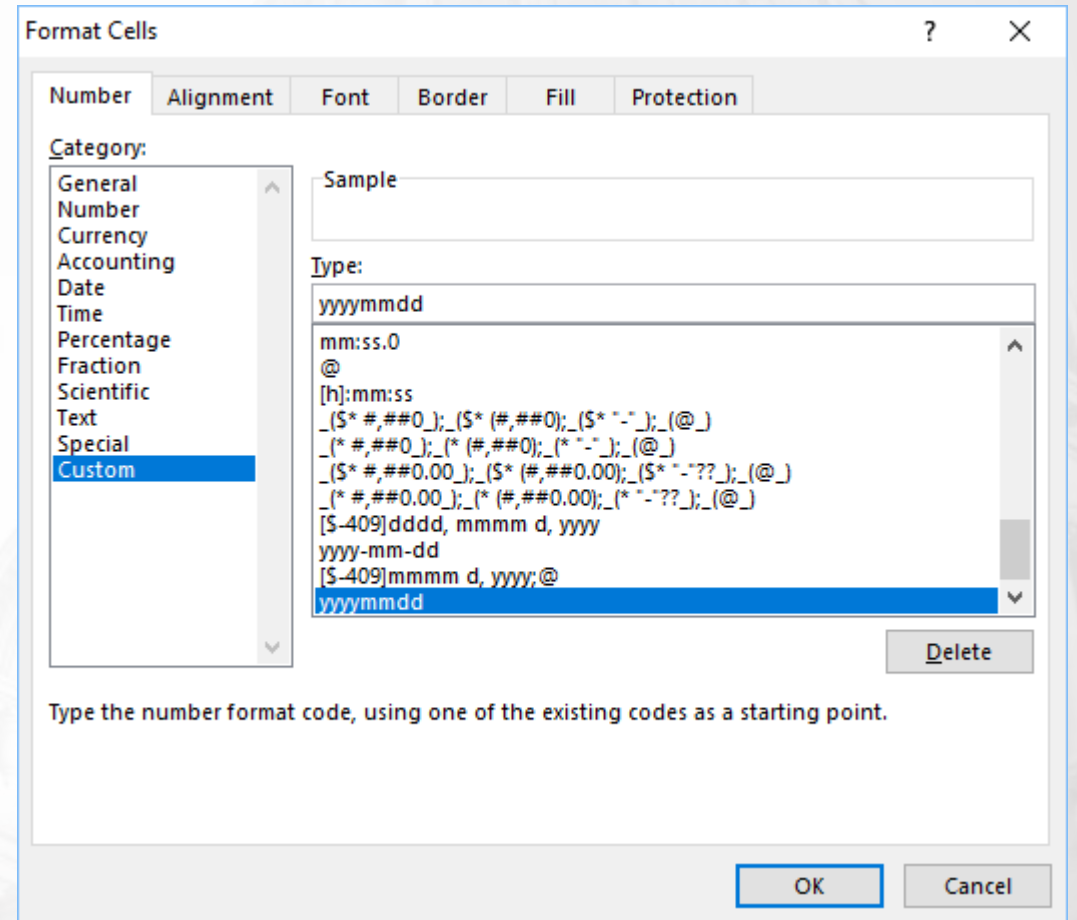
# Add Column from Another Column

- Add dates using the same auto-fill patterns you did with numbers, but this time make it create a normalized version of the date in another column.
  - Format one column to be a human-readable date, such as March 14, 2012.



# Format Normalized Dates

- Format a second column to be a custom date, such as `yyyymmdd`. Make sure to copy this pattern down all of the cells in that column.



# Create Formula

- Create a formula to populate one column with the value of the other. Select a cell in the yyymmdd column. Type +, then click in the March 14, 2012 column, then press Tab.
- Be sure to copy this formula all the way down the column by selecting the first cell, and dragging it down.
- As you type data in the spelled-out date column, or do auto-fill if there's a pattern, the normalized date will fill in.

	C	D	E
	Date	Normal	Description
1		+	
2			
3			
4			

	C	D	E
	Date	Normal	Description
1		+C2	
2			
3			
4			

# Adding Dates is Easy

	A	B	C	D	E
1	Box	Folder	Date	Normal	Description
2	1	1	January 1, 1910	19100101	
3	1	2	February 1, 1910	19100201	
4	1	3	March 1, 1910	19100301	
5	1	4	April 1, 1910	19100401	
6	1	5	May 1, 1910	19100501	
7	1	6	June 1, 1910	19100601	
8	1	7	July 1, 1910	19100701	
9	1	8	August 1, 1910	19100801	
10	1	9	September 1, 1910	19100901	
11	2	1	October 1, 1910	19101001	
12	2	2	November 1, 1910	19101101	
13	2	3	December 1, 1910	19101201	
14	2	4	January 1, 1911	19110101	
15	2	5	February 1, 1911	19110201	
16	2	6	March 1, 1911	19110301	

# Now Add Your Description

- Descriptions usually aren't patterned, so auto-fill doesn't help, but sometimes it does.

	A	B	C	D	E	F
1	Box	Folder	Date	Normal	Description	
2	1	1	January 1, 1910	19100101	A-C	
3	1	2	February 1, 1910	19100201	D-F	
4	1	3	March 1, 1910	19100301	G-I	
5	1	4	April 1, 1910	19100401	J-L	
6	1	5	May 1, 1910	19100501	M-O	
7	1	6	June 1, 1910	19100601	P-R	
8	1	7	July 1, 1910	19100701	S-U	
9	1	8	August 1, 1910	19100801	V-X	
10	1	9	September 1, 1910	19100901	Y-Z	
11	2	1	October 1, 1910	19101001	A-C	
12	2	2	November 1, 1910	19101101	D-F	
13	2	3	December 1, 1910	19101201	G-I	
14	2	4	January 1, 1911	19110101	J-L	
15	2	5	February 1, 1911	19110201	M-O	



# Copy Table to Word

Using Excel as a Mail-Merge data source loses the date formatting you worked hard for, so the Word table will be your data source.

Box	Folder	Date	Normal	Description
1	1	January 1, 1910	19100101	A-C
1	2	February 1, 1910	19100201	D-F
1	3	March 1, 1910	19100301	G-I
1	4	April 1, 1910	19100401	J-L
1	5	May 1, 1910	19100501	M-O
1	6	June 1, 1910	19100601	P-R
1	7	July 1, 1910	19100701	S-U
1	8	August 1, 1910	19100801	V-X
1	9	September 1, 1910	19100901	Y-Z
2	1	October 1, 1910	19101001	A-C
2	2	November 1, 1910	19101101	D-F
2	3	December 1, 1910	19101201	G-I

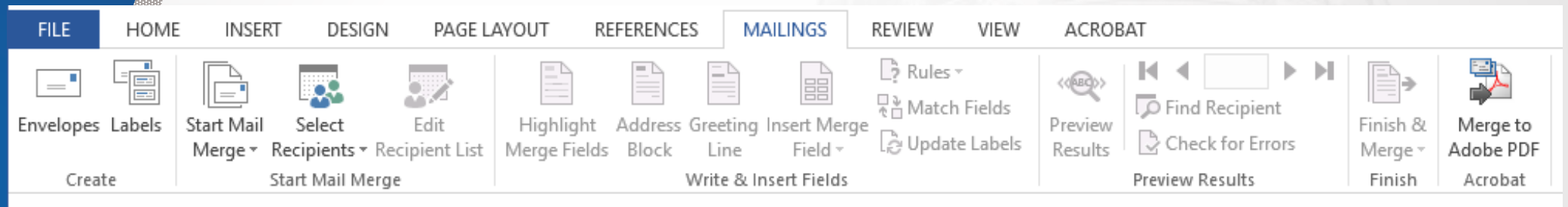
# Create EAD Template

Have a Word version of the EAD template ready to go. Copy it to a new document that will be associated with your data source.

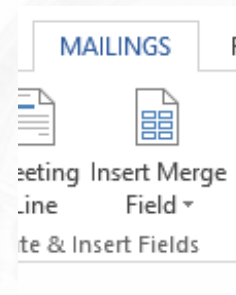
```
<c02 level="file">  
  <did>  
    <container type="box" label="BOX"></container>  
    <container type="folder" label="FOLDER"></container>  
    <unittitle encodinganalog="title" label="DESCRIPTION"></unittitle>  
    <unitdate encodinganalog="date" normal=""></unitdate>  
  </did>  
</c02>
```

# Add Merge Fields

- Click Select Recipients, and choose your file with the table.

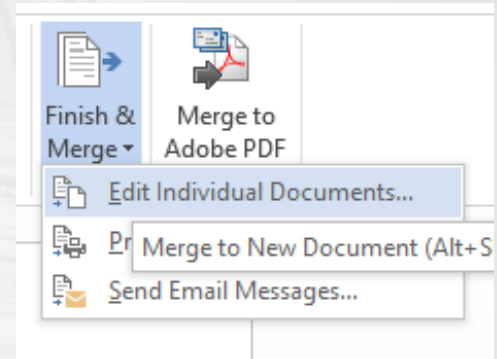


- Click Insert Merge Field



# Add Merge Fields

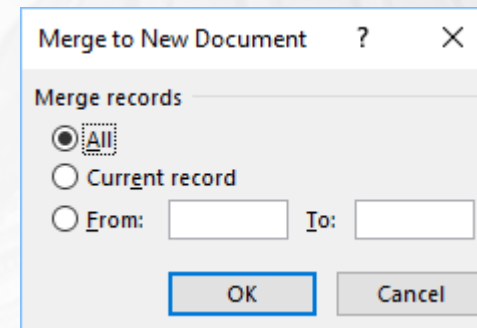
- Place the fields where you want them in the XML.
- You may preview the results, or just Finish & Merge.



```
<c02 level="file">
  <did>
    <container type="box" label="BOX">«Box»</container>
    <container type="folder" label="FOLDER">«Folder»</container>
    <unittitle encodinganalog="title" label="DESCRIPTION">«Description»</unittitle>
    <unitdate encodinganalog="date" normal="«Normal»">«Date»</unitdate>
  </did>
</c02>
```

# Merge Records

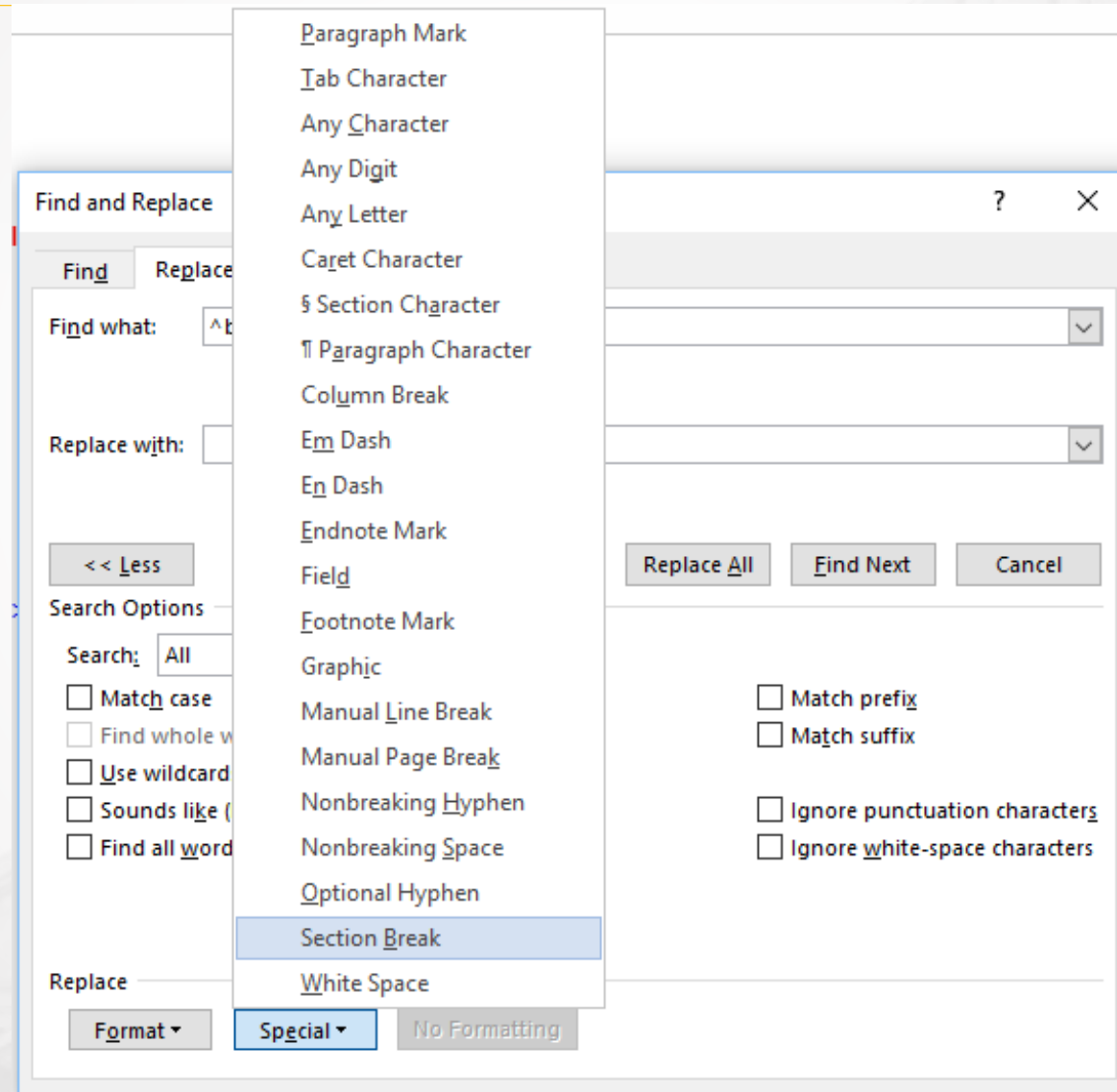
- Choose to merge all records



```
<c02 level="file">
  <did>
    <container type="box" label="BOX">1</container>
    <container type="folder" label="FOLDER">1</container>
    <unittitle encodinganalog="title" label="DESCRIPTION">A-C</unittitle>
    <unitdate encodinganalog="date" normal="19100101">January 1, 1910</unitdate>
  </did>
</c02>
```

# Replace Section Breaks

Each XML segment will be on a separate page. Find and replace all section breaks (a special character).



# All Done!

```
<c02 level="file">
  <did>
    <container type="box" label="BOX">1</container>
    <container type="folder" label="FOLDER">1</container>
    <unittitle encodinganalog="title" label="DESCRIPTION">A-C</unittitle>
    <unitdate encodinganalog="date" normal="19100101">January 1, 1910</unitdate>
  </did>
</c02>
<c02 level="file">
  <did>
    <container type="box" label="BOX">1</container>
    <container type="folder" label="FOLDER">2</container>
    <unittitle encodinganalog="title" label="DESCRIPTION">D-F</unittitle>
    <unitdate encodinganalog="date" normal="19100201">February 1, 1910</unitdate>
  </did>
</c02>
<c02 level="file">
  <did>
    <container type="box" label="BOX">1</container>
    <container type="folder" label="FOLDER">3</container>
    <unittitle encodinganalog="title" label="DESCRIPTION">G-I</unittitle>
    <unitdate encodinganalog="date" normal="19100301">March 1, 1910</unitdate>
  </did>
</c02>
```