# Automating Container Lists with Word/Excel

Elizabeth Perkes June 27, 2018



#### 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.

	Α	В	С	D	E	F
1	Box	Folder	Date	Normal	Descriptio	n
2	1					
3	1					
4		1				
5						
~						

	Α	В	С	D	E	
1	Box	Folder	Date	Normal	Descriptio	n
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.

	Α	В	С	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		⁄车		
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 humanreadable date, such as March 14, 2012.

rmat Cells						?	Х
Number Align	ment	Font	Border	Fill	Protection		
<u>C</u> ategory: General Number Currency	^	Sample					
Accounting Date Time Percentage Fraction Scientific Text Special Curter		Type: 03/14/12 14-Mar 14-Mar- 14-Mar- Mar-12 March-1 March 1	2 12 12 2 4, 2012				~
Custom	~	Locale (lo English	ocation): (United Stat	tes)			~

Date formats display date and time serial numbers as date values. Date formats that begin with an asterisk (\*) respond to changes in regional date and time settings that are specified for the operating system. Formats without an asterisk are not affected by operating system settings.



Cancel

OK

#### 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.

Format Cells ? X	×
Number Alignment Font Border Fill Protection	
Number       Alignment       Font       Border       Fill       Protection         Category:       General       Sample       Image: Sample	∧ ∧ ⊇elete



Cancel

OK

## Create Formula

- Create a formula to populate one column with the value of the other. Select a cell in the yyyymmdd 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.

С	D	E
Date	Normal	Description
1	+	
2		
3		
4		
11 mil		
С	D	E
	Name	Description
Date	INORMAL	Description
Date 1	+C2	Description
Date 1 2	+C2	Description
Date 1 2 3	+C2	Description



### Adding Dates is Easy

			-		-	
	A	В	С	D	E	
1	Box	Folder	Date	Normal	Descriptio	r
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.

	А	В	С	D	E	
1	Box	Folder	Date	Normal	Descriptio	n
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">

<<u>did</u>>

</did>

<container type="box" label="BOX"></container> <container type="folder" label="FOLDER"></container> <unittitle encodinganalog="title" label="DESCRIPTION"></unittitle> <unitdate encodinganalog="date" normal=""></unitdate>



#### Add Merge Fields

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

FILE	HOME	INSER	T DESIG	N PAGE L/	AYOUT F	REFERENCE	S N	AILINGS	REVIEW	VIEW	ACROB	AT		
<b>•</b> Envelopes	Labels	Start Mail Merge * F	Select Recipients *	Edit Recipient List	Highlight Merge Field	Address Block	Greeting	g Insert Merge Field -	Rules → Natch	Fields Labels	<@@> Preview Results	Find Recipient	Finish & Merge •	Merge to Adobe PDF
Creat	te	S	Start Mail Me	rge			Write &	Insert Fields				Preview Results	Finish	Acrobat

#### • Click Insert Merge Field

MAI	LINGS	RI
eeting Ir	isert Mer	ge [
.ine	Field *	L
te & Ins	ert Fields	



#### 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">

<<u>did</u>>

<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»</unittitle> </did>





#### 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>





#### Replace Section Breaks

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

	<u>P</u> aragraph Mark	]
	Tab Character	
	Any <u>C</u> haracter	
	Any Digit	
Find and Replace	Any Letter	? ×
Find Replace	Caret Character	
- · · · · · · · · ·	§ Section Ch <u>a</u> racter	
Find what: ^t	¶ Paragraph Character	×
	Col <u>u</u> mn Break	
Replace w <u>i</u> th:	E <u>m</u> Dash	✓
	E <u>n</u> Dash	
	<u>E</u> ndnote Mark	
<< <u>L</u> ess	Fiel <u>d</u>	Replace <u>All</u> <u>F</u> ind Next Cancel
Search Options	<u>F</u> ootnote Mark	
Search: All	Graph <u>i</u> c	_
Matc <u>h</u> case	Manual <u>L</u> ine Break	Match prefix
Use wildcard	Manual Page Brea <u>k</u>	
Sounds li <u>k</u> e (	Nonbreaking <u>H</u> yphen	☐ Ignore punctuation characters
Find all word	Nonbreaking Space	Ignore <u>w</u> hite-space characters
Optional Hyphen		
	Section <u>B</u> reak	
Replace	<u>W</u> hite Space	
F <u>o</u> rmat <del>▼</del>	Special  No Formatting	-



#### All Done

<c02 level="file">

#### <<u>did</u>>

<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> <unittitle encodinganalog="title" normal="19100201">February 1, 1910</unittitle> </did>

<c02 level="file">

</c02>

<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>

DAS