



## **Creating Label Records**

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## Introduction

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The purpose of this document is to provide a general introduction to the process for Creating Label Records in eSIS. The Create Label Records function in eSIS allows the user to easily export data from within eSIS to a file which can be used to produce various types of labels to meet specific needs. Use of the demographic extract allows the user to select specific students to be included on the labels. To complete this process, access to Microsoft Excel® and Microsoft Word® is needed.

**Note:** The instructions in this document are based on Microsoft Word® 2002, Microsoft Excel® 2002, and on the WindowsXP® operating system. While the screen shots may differ between the version contained in this document and the versions used by the eSIS user, the general functionality and process is the same.

## Creating Labels Using the Export Function

There are five basic steps to creating labels in eSIS:

1. Create a directory to receive exported data .
2. Select students using the demographic extract.
3. Create export.
4. Import data into Excel.
5. Mail Merge into Word to create the labels of choice.

These steps are described in detail in the following sections.

### Step 1: Create a Directory

The first step is to create a directory on the hard drive to which you can export the labels. This step only has to be completed once.

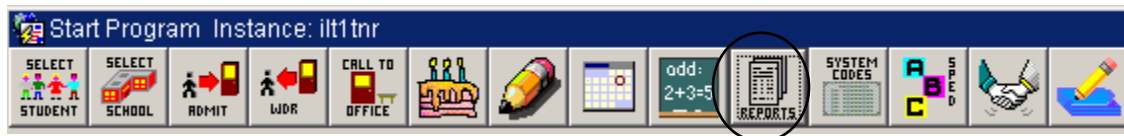
1. Right click the workstation desktop.
2. Select New Folder from the menu.
3. Name the new folder **Label s** (or use a more specific name such as **File Folder Label s**). A folder named **Label s** is created on the desktop.

### Step 2: Create a Demographic Extract

The second step is to create a demographic extract to select the students to be included in the label.

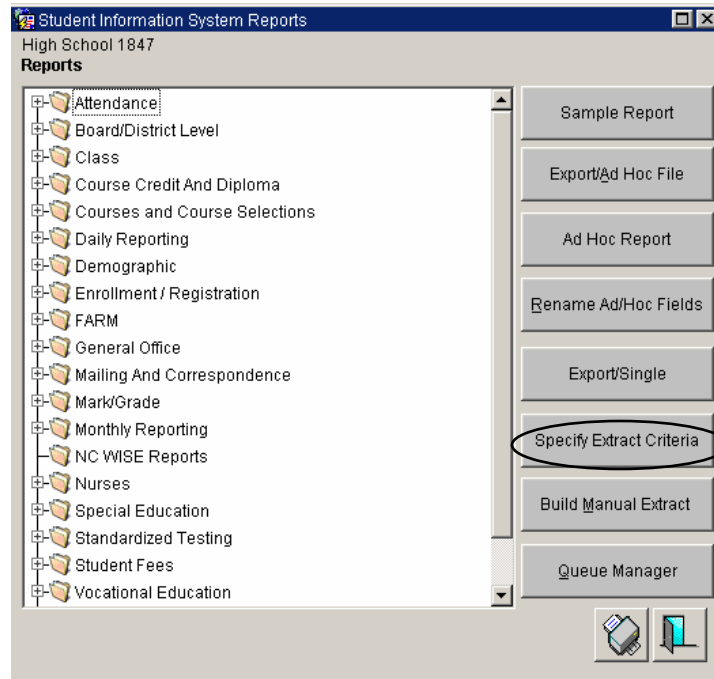
To access the **Demographic Extract** screen:

1. Click the **Reports** icon on the **eSIS Main Start** screen. The **Student Information System Reports** screen opens.



2. Click the **Specify Extract Criteria** button.

### Student Information System Reports screen



The **Demographic Extract** screen opens as shown below.

### Demographic Extract screen

**Note: Leave field blank implies this selection conditions does not apply.**

Basic Courses Misc 1 Misc 2 Misc 3 Address Attendance Testing Adv. Farms Schools Results

Curr Year  
 Next Year

Legal Name: [?] First Name: [?] Legal Middle Name: [?] Gender: [?] Full/Part-Time: [?]  
 Wise County 65 High 9

Grades:  NOT HRM 1: [?] HRM 2: [?] Admission Types:  NOT  
 Cross Enrolled Students: [Include]

Release of Information - Info. Restriction Type: [?]  
 Release Of Information With No Reason  
 Internet Access - Internet Restriction Reason: [?]

Primary Language spoken at home:  NOT Program Type:  NOT Teams: [?] Alerts: [?]  
 Admission Status: [?]

OR  
 Funding Category: [?]  
 Match Criteria: [ALL]

Interpreter Required Life Threatening Indicator: [?]  
 Requested Materials in Another Language State/Min #: [?]

### Using the Demographic Extract Screen

In the **Demographic Extract** screen, you can identify the criteria to determine which students will be included in the export file. The tabs across the top of the screen each represent a new screen with different fields of information that can be selected to set the criteria for the search.

#### Basic Tab

When the **Demographic Extract** screen opens, the **Basic** tab is selected.

## Demographic Extract screen

**Note: Leave field blank implies this selection conditions does not apply.**

Basic Courses Misc 1 Misc 2 Misc 3 Address Attendance Testing Adv. Farms Schools Results

Legal Name First Name Legal Middle Name Gender Full/Part-Time

Curr Year  Next Year

Grades  NOT HRM 1 HRM 2 Admission Types  NOT

Primary Language spoken at home  NOT Program Type  NOT Teams Alerts

Interpretor Required Life Threatening Indicator

Requested Materials in Another Language State/Min #

Cross Enrolled Students  Include  Exclude

Release of Information - Info. Restriction Type

Release Of Information With No Reason

Internet Access - Internet Restriction Reason

Admission Status

OR

Funding Category

Match Criteria ALL

Clear Extract Criteria Saved Extracts List Run Extract

The **Curr** (Current) **Year** radio button and the **Include Cross Enrolled Students** checkbox are default settings. Below the basic data fields are 3 buttons:

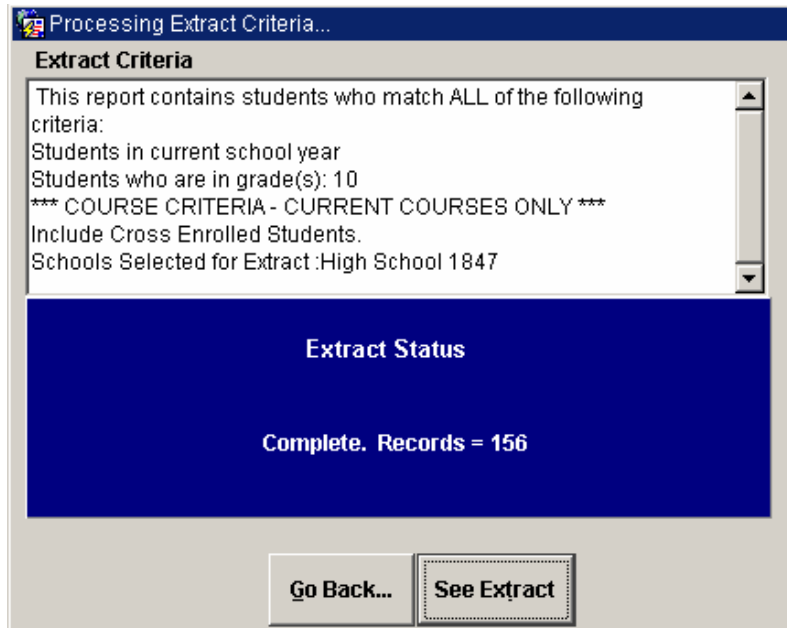
- **Clear Extract Criteria**
- **Saved Extracts List**
- **Run Extract**

To continue creating the extract:

1. Click the **Clear Extract Criteria** button to clear all previous choices.
2. Click the drop-down list above the **Include Cross Enrolled Students** checkbox to view the school(s) to which the user has security access. Click the school name to select it.
3. Click the **Include Cross Enrolled Students** checkbox to deselect if those students are not to be included in the extract. In this example, the checkbox will remain selected so that cross-enrolled students will be included in the extract.
4. Other criteria can be set to further define the group of students to receive the letter. For this example, only 10<sup>th</sup> grade students should receive this letter.
  - a. Select "GR 10" in the **Grade** drop-down list.
  - b. Click the **Run Extract** button. All 10<sup>th</sup> grade students enrolled at this school including 10<sup>th</sup> grade cross-enrolled students will be included in the extract.

The **Processing Extract Criteria** screen displays as shown below. The upper section of the window includes the criteria set for the extract. After the extract has been completed, the number of records that meet the criteria is displayed.

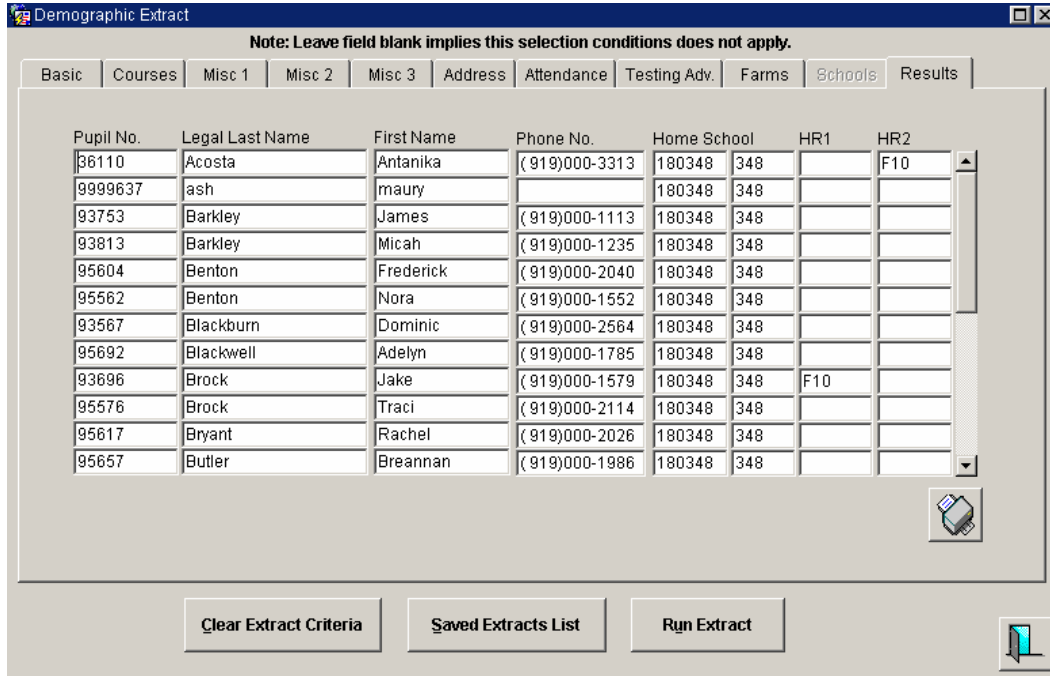
### Processing Extract Criteria screen



- c. Click **See Extract** to go to the **Results** tab to view the information for students who met the criteria. The **Results** tab contains basic information about the students: **Pupil No.** , **Legal Last Name**, **First Name**, **Phone No.** , **Home School** , **HR1**, and **HR2**.

**Note:** Clicking the **Go Back** button will take you back to the **Basic** tab.

Demographic Extract screen – Results tab



- d. Click **Exit** to return to the **Student Information System Reports** screen.

**Step 3: Create Label Parameters**

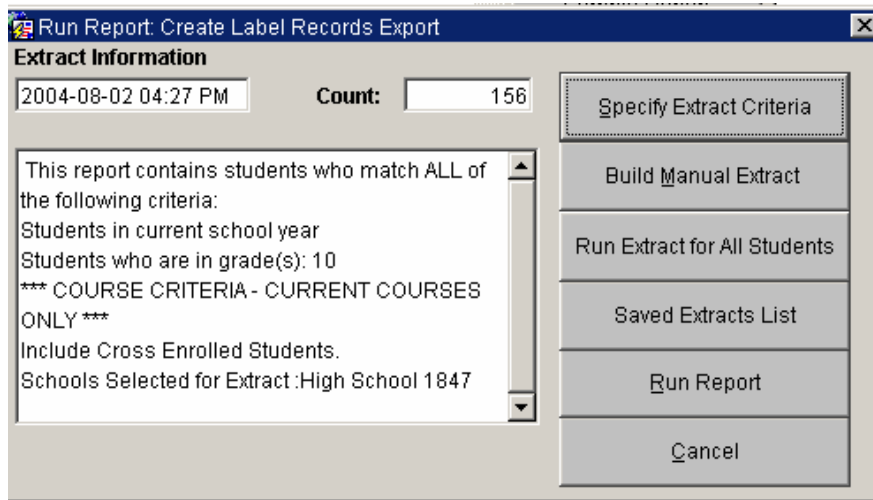
To create the label parameters:

1. In the **Student Information System Reports** screen, expand the **Mailing and Correspondence** report group.
2. Double click the **Create Label Records Export** report.

Student Information Systems Reports screen

The **Run Report: Create Label Records Export** screen displays.

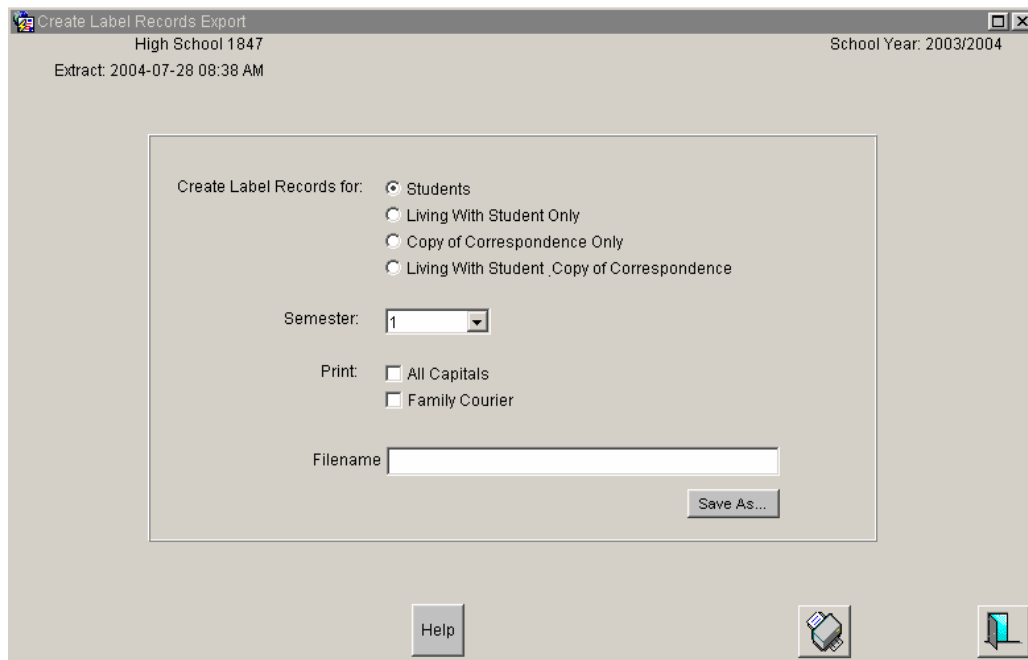
Run Report: Create Label Records Export screen



**Note:** The data from the previously run extract is now displayed on the **Run Report: Create Label Records Export** screen.

3. Click the **Run Report** button. The **Create Label Records Export** parameter form displays, allowing the user to make selections.

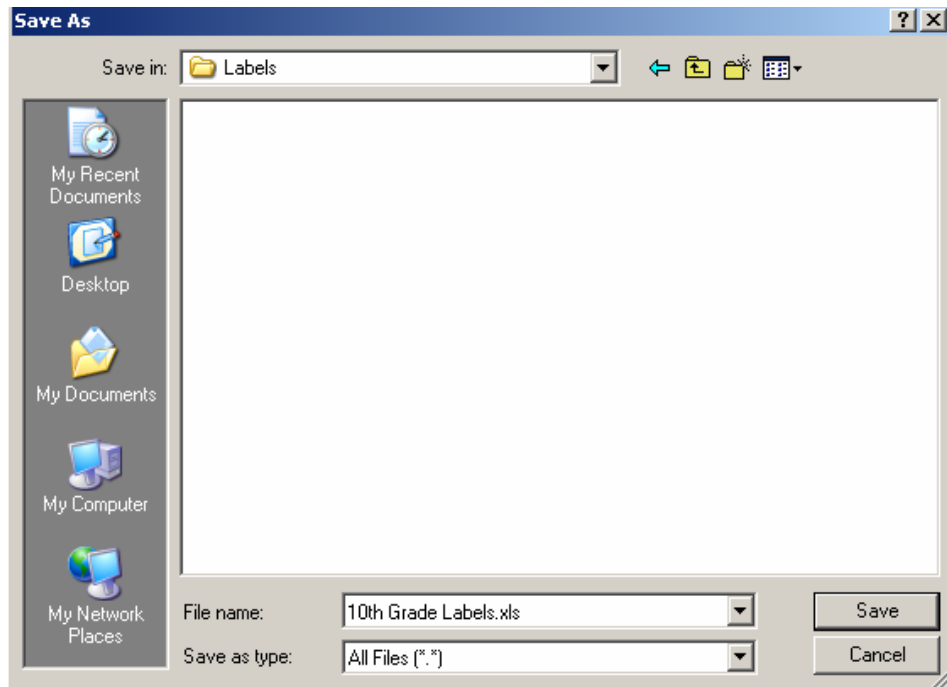
Create Label Records Export parameter form



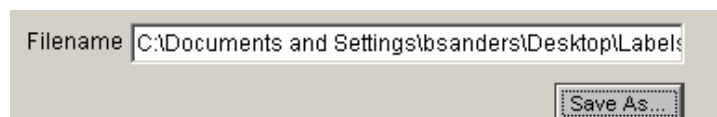
4. Four options for labels are available on the **Create Label Records Export** parameter form. Select the option that you prefer for your label export.
  - **Students** – Generates one record for each student in the demographic extract using the student’s mailing address.
  - **Living with Student Only** – Generates one record for each student included in the demographic extract. The export uses the parent/guardian mailing address on the **Parent Information** screen if the **Living With** checkbox is selected.
  - **Copy of Correspondence Only** – Generates one record for each parent/guardian with the **Copy of Correspondence** checkbox selected on the **Parent Information** screen.
  - **Living with Student, Copy of Correspondence** – Generates records combining the **Living with Student Only** and **Copy of Correspondence Only** options.
5. Other fields on the parameter are **Semester**, **Print**, and **Filename**. Set any of these options that you prefer for your label export:
  - **Semester** – Allows the user to select the semester for which the label records are to be generated. For example, if homeroom information is selected as part of the demographic extract for students and if Semester 1 were selected here, then the label records export would only include those homeroom assignments for the first semester.
  - **Print** – The **All Capitals** checkbox allows the user to indicate if the data to be exported should be capitalized. The **Family Courier** checkbox allows the user to indicate if the data to be exported should be based on the **Family Courier** field in eSIS. If the school uses the **Family Courier** function, only one record per family will be produced.
  - **Filename** will be populated with the name the user gives to the export file as well as the path to the directory in which the file is saved. This will be addressed in the next step.

**Note:** If multiple parent information records exist and there are differences in the parent/guardian mailing address or home phone numbers, multiple records will be created for this student (listing both addresses, phone numbers, etc). If a student does not have any parent/guardian information entered, a record using that student’s mailing address will be created.
6. Click the **Save As** button beside the **Filename** field. This opens the **Save As** screen.

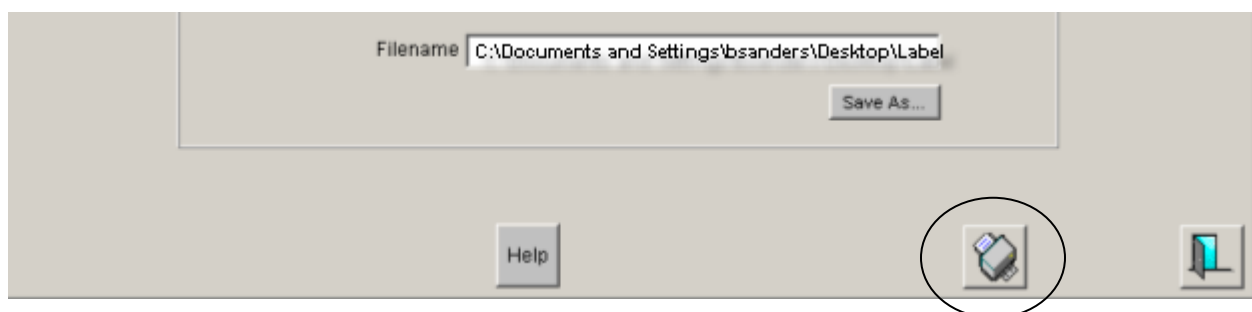
## Save As screen



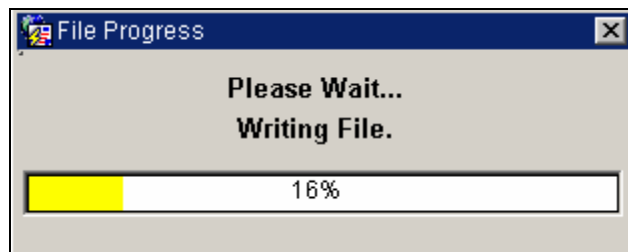
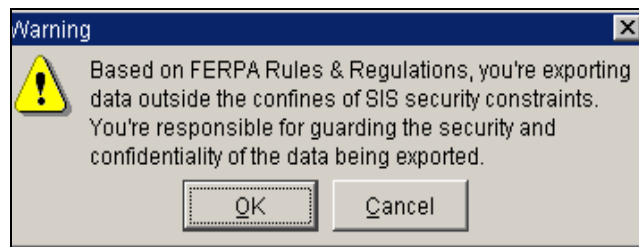
7. In the **Save in** field, navigate to the location where the original **Label s** folder was created. For this example, the path would be  
C:\Documents and Settings\bsanders\Desktop\Labels\
8. In the **File name** field, specify a name for the labels file. For example, "Grade10Labels.xls". You must add the file extension of **.xls** to the end of the file name for the export to work properly.
9. Click the **Save** button to return to the **Create Label Records Export** parameter form. The path and filename that you specified are displayed in the **Filename** field. For example:



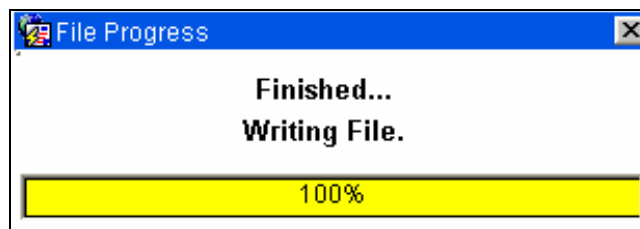
10. From the **Create Label Records Export** parameter form, click the **Print** button.



11. A warning message appears to warn you that data is being exported outside of eSIS and the eSIS security no longer protects access to this data. Click **OK** to continue. The **File Progress** window displays as the system is exporting the file.



12. When the **Finished...Writing File** message displays, click the  button.



13. Exit from the Reports screen.

## Step 4: Import the Label Data into Excel

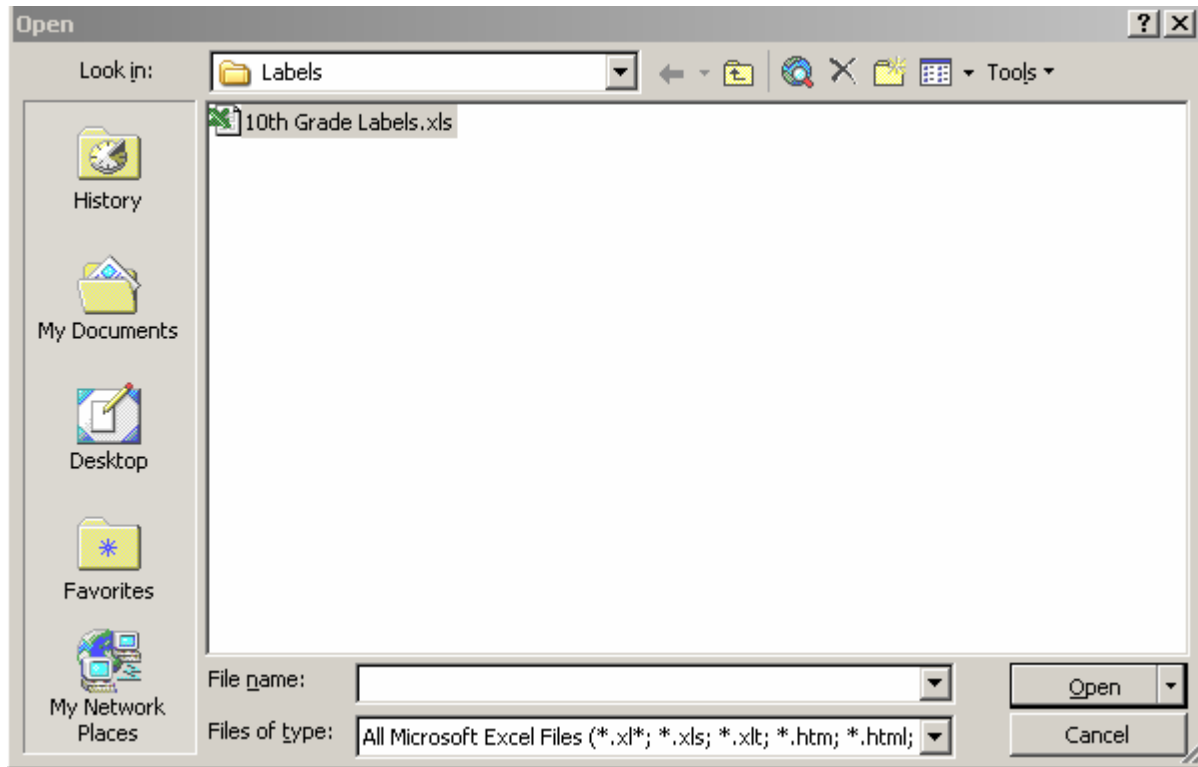
To import the label data into Excel:

1. Open the Excel program by:
  - Clicking the Microsoft Excel® icon on the user desktop, or
  - Navigating to the program from the workstation desktop as follows:

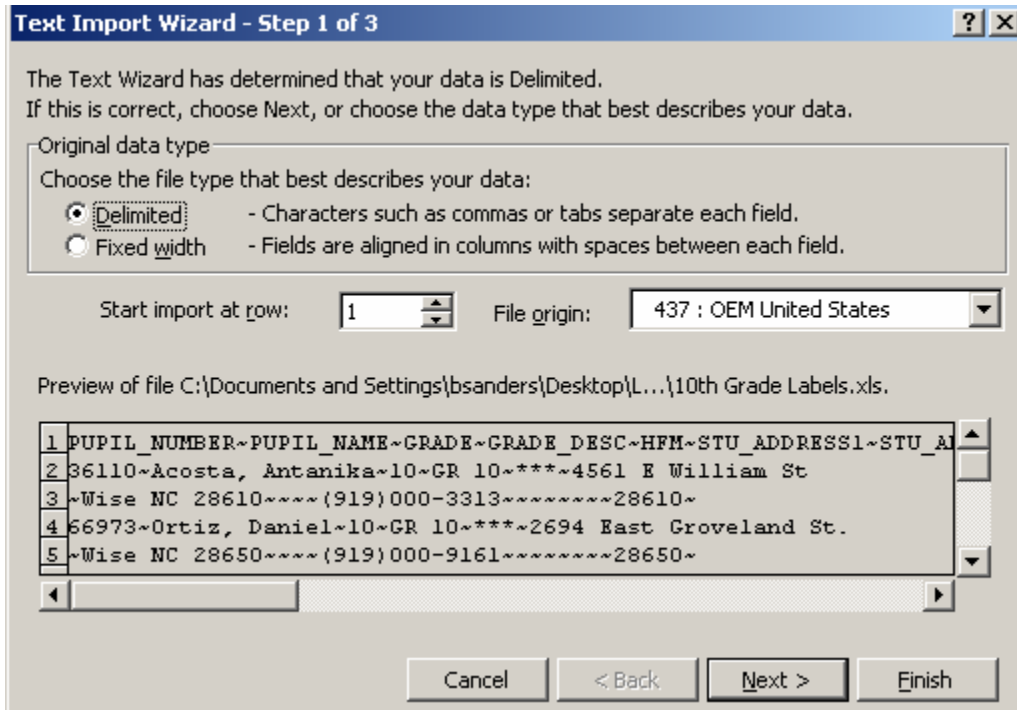
**Navigation:** Start > Programs > Microsoft Excel

**CAUTION:** DO NOT open Excel by opening the label file created from eSIS or the following steps will not work.

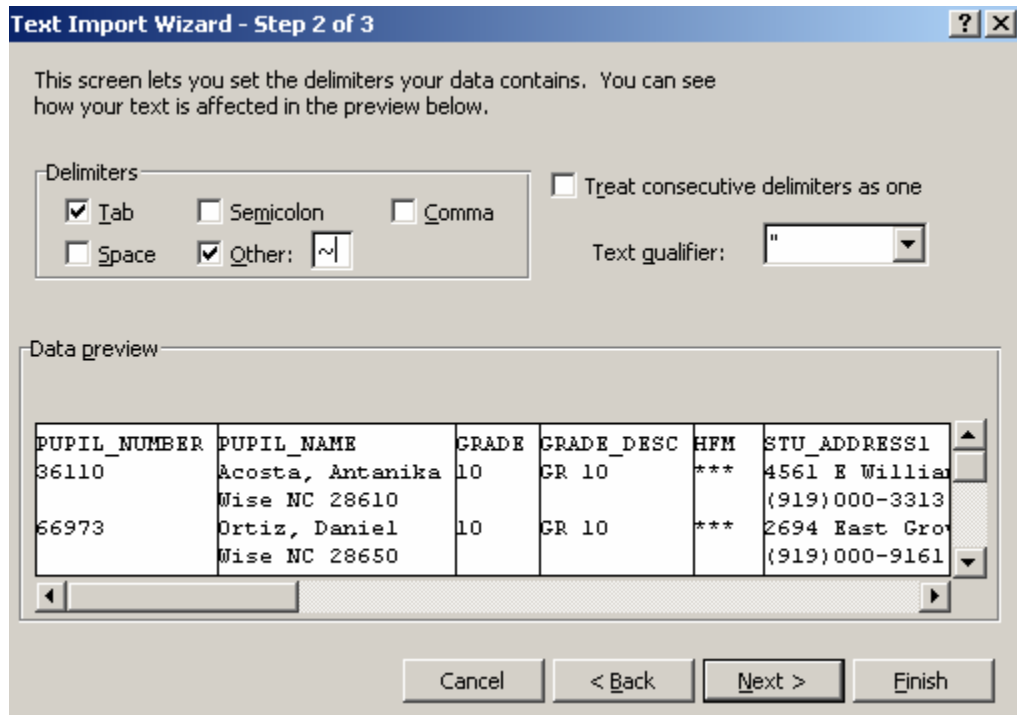
2. From the Menu Bar, select **File > Open**. The **Open** screen appears.



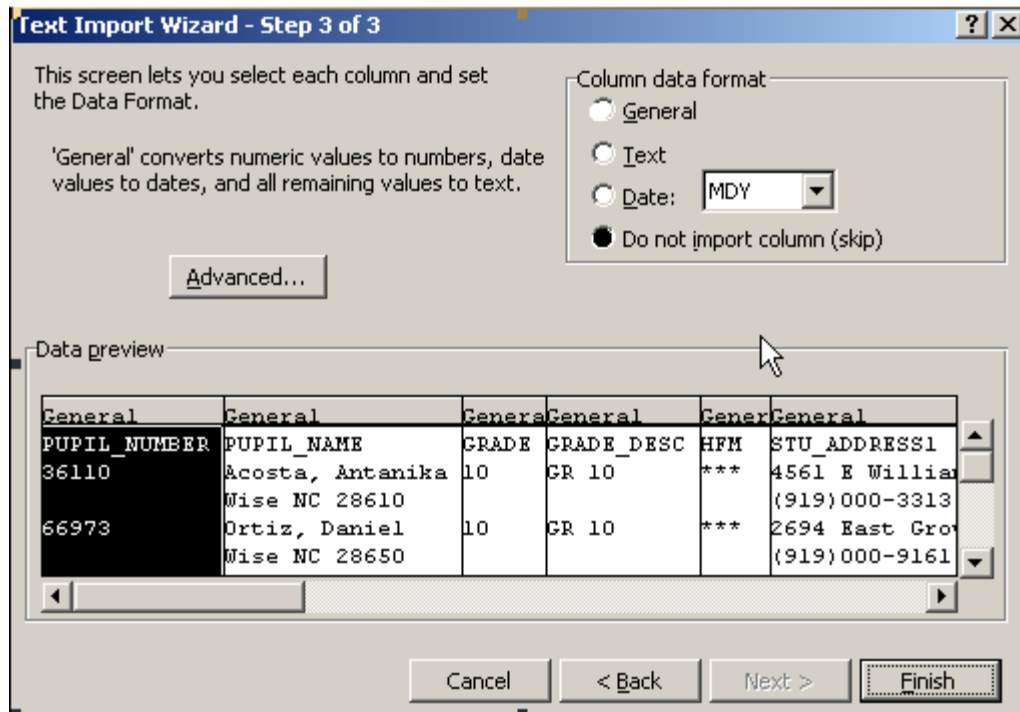
3. In the **Look In** field, select the path to where the label file was saved.  
**Note:** Make sure that the **Files of Type** field is set to **All Microsoft Excel Files**.
4. Click the filename to select it, then click the **Open** button. This begins the **Text Import Wizard** process.



- In Step 1 of the Wizard, select the **Delimited** radio button and click the **Next** button. Leave all other fields at the default settings.



6. In Step 2 of the Wizard, change the **Del i mi ter** field from **Tab** to **Other**:
  - a. Click the **Tab** checkbox to deselect it.
  - b. Check **Other**. In the field beside **Other**, insert a **Ti l d e** (~). The tilde key is located to the left of the 1 key on your keyboard.
7. Click the **Next** button. The **Text Import Wizard – Step 3 of 3** opens.



8. Step 3 of the Wizard allows users to perform additional formatting on the data or to elect to not import a column. For example, if you wanted to prevent the **Pupil I Number** from appearing on the label, you would:
  - a. Highlight the column by clicking on the **General** header button above Pupil\_Number.
  - b. Select the **Do not import column (skip)** radio button.
9. Click the **Finish** button. The data is now imported into Excel.

B	C	D	E	F	G	H	I	J	K	L
PUPIL_NA	GRADE	GRADE_D	HFM	STU_ADD1	STU_ADD1	STU_ADD1	STU_ADD1	STU_ADD1	STU_PHO	PAR_ADD
Acosta, Ar	10	GR 10	***	4561 E William St						
Wise NC 28610				(919)000-3313						
Ortiz, Dani	10	GR 10	***	2694 East Groveland St.						
Wise NC 28650				(919)000-9161						
Grant, Ché	10	GR 10	***	510 Saint James Place						
Wise NC 28650				(919)000-5224						
Waddell, N	10	GR 10	F10	5103 Saint James Place						
Wise NC 28610				(919)000-5143						
Blackburn,	10	GR 10	***	2935 S Education Lane						
Wise NC 28658				(919)000-2564						
Estevez, J	10	GR 10	***	2331 S Education Lane						
Wise NC 28658				(919)000-2054						
Schreiber,	10	GR 10	***	3455 S Education Lane						
Wise NC 28658				(919)000-1567						
Rivenbark,	10	GR 10	***	411 S Education Lane						
Wise NC 28650				Unlisted						
Brock, Jak	10	GR 10	F10	310 S Education Lane						
Wise NC 28650				(919)000-1579						
Martinez J	10	GR 10	***	4812 S Education Lane						
Wise NC 28650				(919)000-1548						

**Note:** The columns are often skewed and may require resizing to view the data. Place the cursor on a line between two column headings to change it to the crossbow and double click. All fields will be adjusted to the correct width.

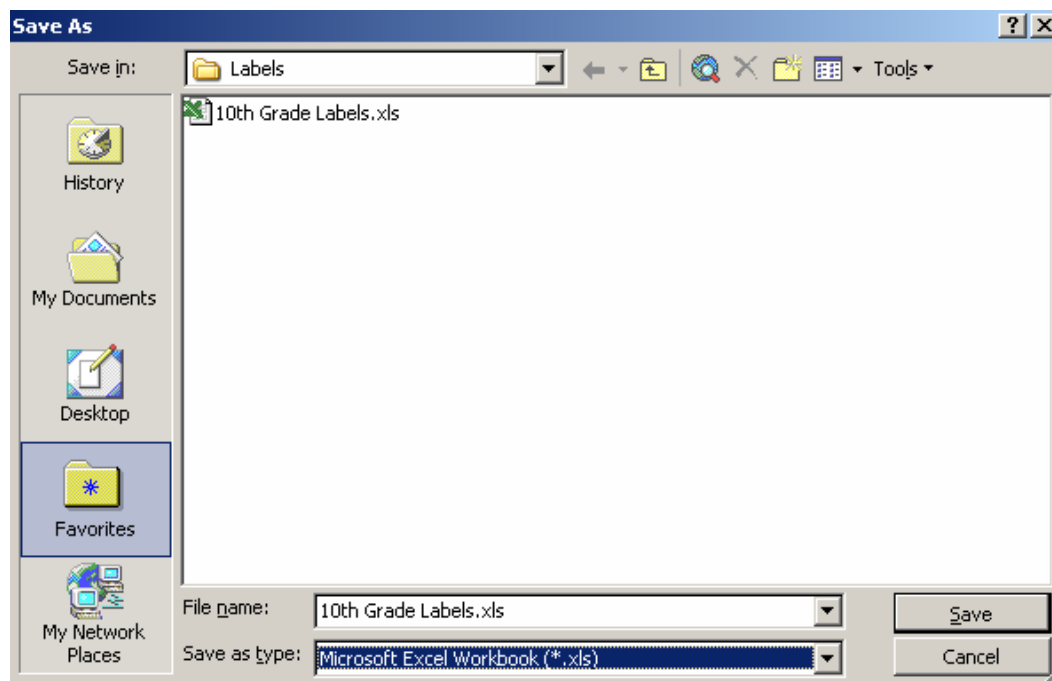
### Saving the File

To save the file:

1. From the Excel Menu Bar, select **File > Save As**. The existing filename will have quotes around it for example, "10<sup>th</sup> Grade Labels.xls" and the **Save as Type** will be **Text** (tab delimited).
2. In the **Save in** field, select the location where you want to save the file.
3. Highlight the existing filename and quotes and type the name you prefer for the file in the **File name** field.

**Note:** If you do not specify a different name for the file, then a message will appear asking whether you want to overwrite the existing file.

4. In the **Save as type** field, select **Microsoft Excel Workbook (\*.xls)**. The **xls** extension will be added to the file.

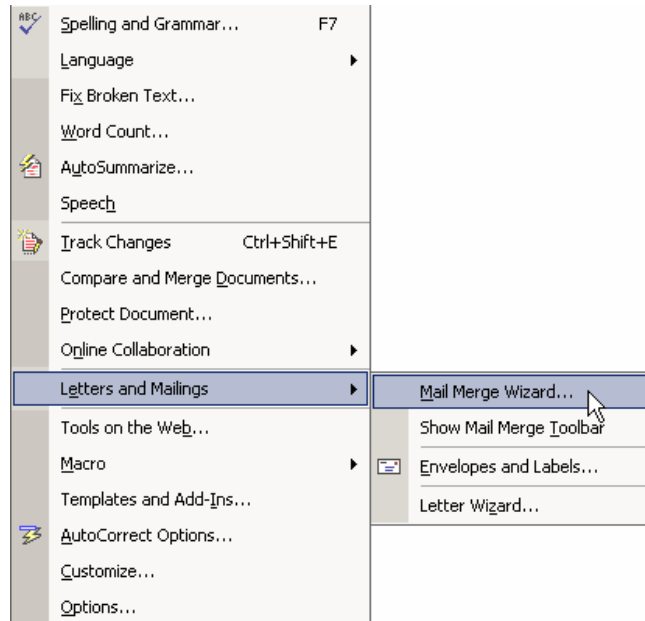


5. Click the **Save** button.

## Step 5: Mail Merge the Label File into Microsoft Word®

To open the Mail Merge window in Microsoft Word®:

1. From the user desktop, launch Microsoft Word®.
2. From the Menu Bar, select **File > New** (Blank Document).



3. Using the Menu Bar, open the **Mail Merge** window by selecting:

**Navigation:** Tools > Letters and Mailings > Mail Merge

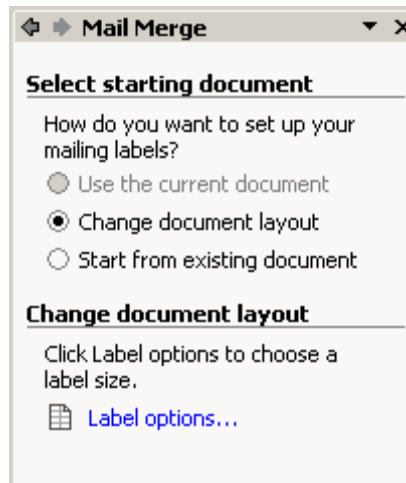
### Step 1: Setting up the Labels

1. In the **Mail Merge** pane that appears, select the **Labels** radio button.

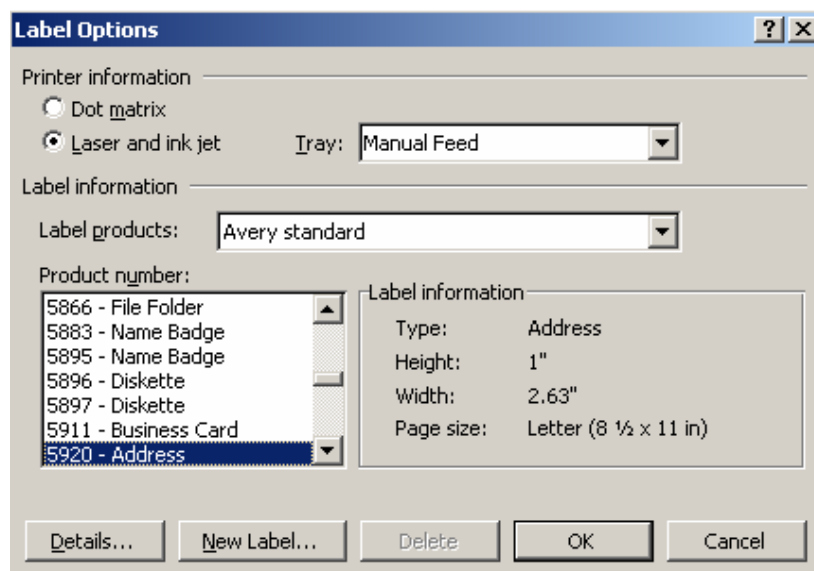


2. At Step 1, click the **Next: Starting Document** link at the bottom right hand side of the screen to proceed to the next step in the mail merge process.

3. Select the **Change document layout** radio button.



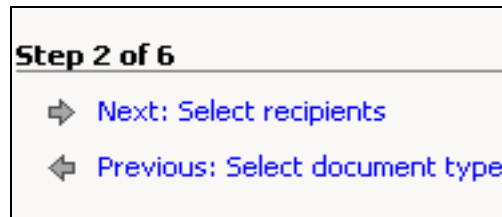
4. Click **Label Options** to open the **Label Options** window.



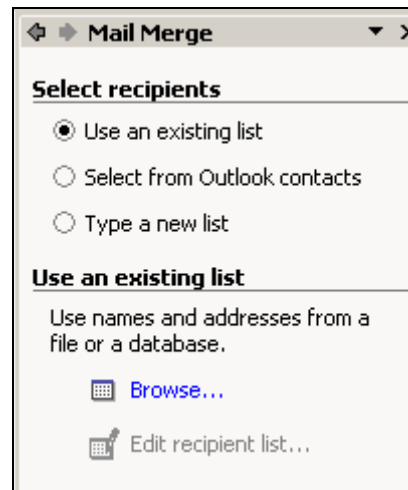
5. The radio buttons in the **Printer Information** area allow the user to select either **Dot Matrix** or **Laser and Ink Jet**. Tray is used to indicate where the labels will be loaded. Select the **Label products** and **Product number** that best matches the type and measurements of the label to be printed.
6. Click the **OK** button. A blank document appears on the screen. This document shows formatting changes to accommodate the label type selected by the user.

**Step 2: Selecting Recipients**

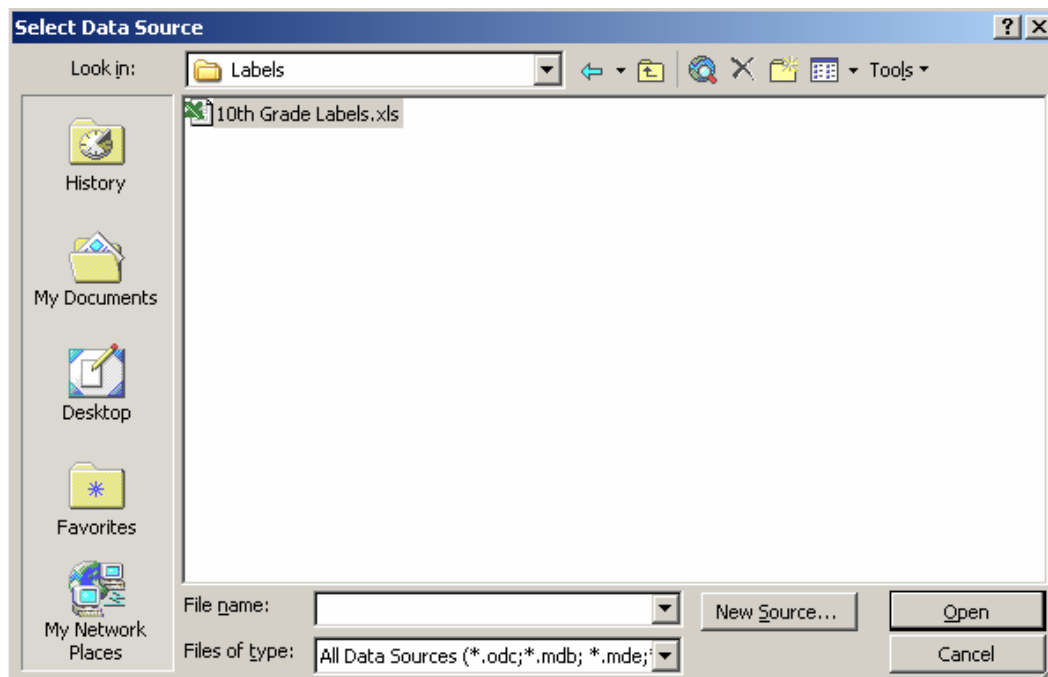
1. In the Step 2 area, click the **Next: Select recipients** link at the bottom right corner of the screen.



2. In the window that appears, select the **Use an existing list** radio button.

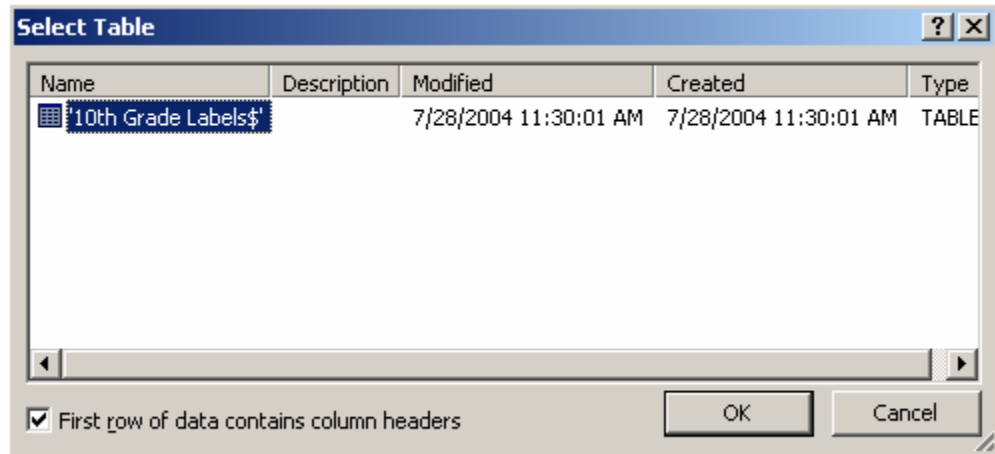


3. Click the **Browse** link.

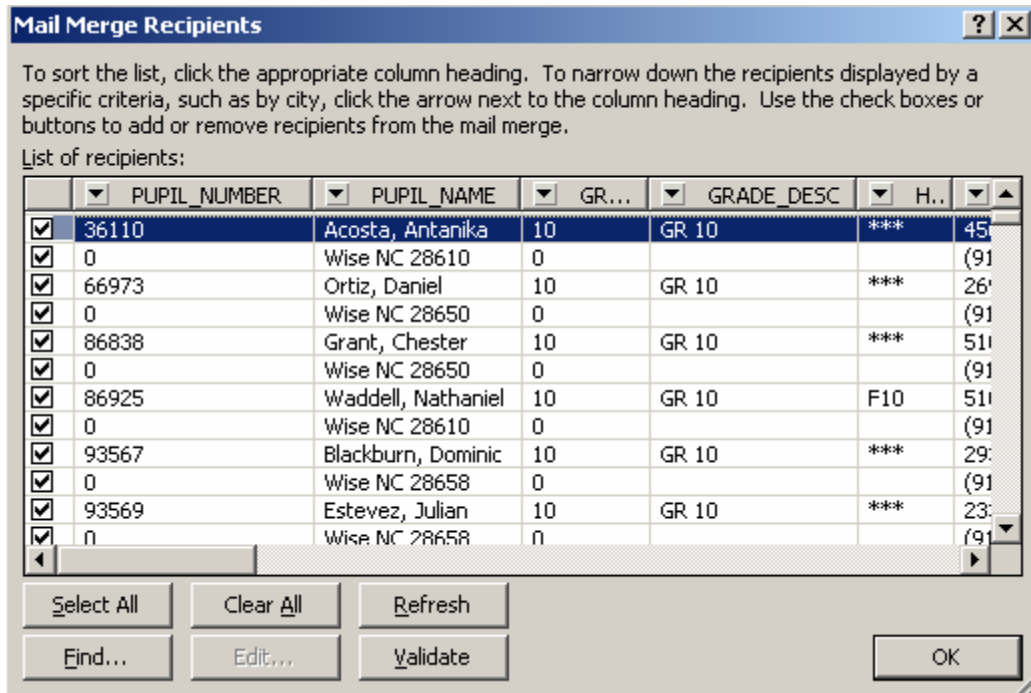


**Note:** Be sure to verify that the **Files of Type** field is set to All Data Sources (\*.odc; \*.mdb; \*.mde; , etc.).

4. In the **Look In** field, select the correct destination where the label file was saved.
5. Click the **Open** button. The **Select Table** window opens.



6. Verify that the correct label file displays, and click the **OK** button. This opens the **Mail Merge Recipients** screen.

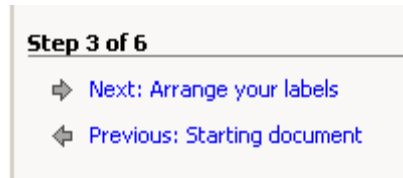


7. Click the **Select All** button.
8. Click the **OK** button.

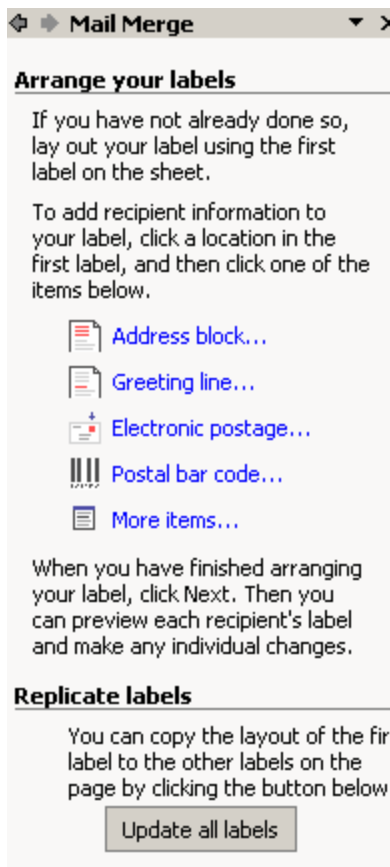
### Step 3: Arranging the Labels

To arrange the labels:

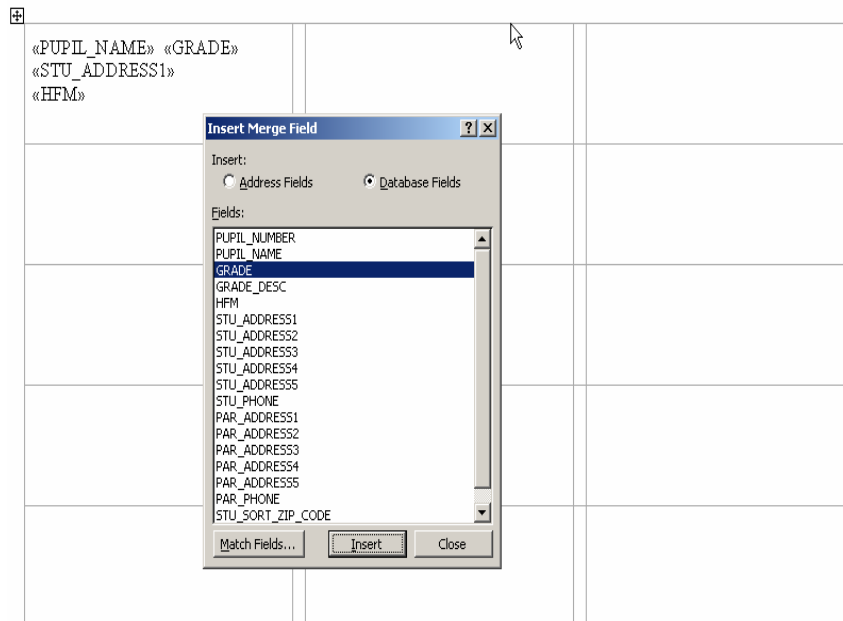
1. Select Step 3 – Next: **Arrange your Labels** at the bottom right hand corner of the screen.



2. The **Arrange your Labels** pane opens. Select the **More Items** link in order to set the format of the label.



3. On the **Insert Merge Field** window, verify that the **Database Fields** radio button is selected.



4. Select the fields one by one in the order in which they should appear on the label:
  - a. Select the first field to be included on the label, and click the **Insert** button.
  - b. Click the **Close** button.
  - c. Move the cursor on the label to the position where the second field should appear.
  - d. Select the More Items link to choose the next field to be included.
  - e. Select the field to add and click the **Insert** button.
  - f. Click the **Close** button.
  - g. Repeat this process for all fields needed on the label.
5. Click the **Update All Labels** button to add the field names to each label.

**Step 4: Previewing Labels**

To preview your labels:

1. Click the Step 4 – Next: **Preview your labels** link.

**Step 4 of 6**

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[➡ Next: Preview your labels](#)  
[⬅ Previous: Select recipients](#)

2. Labels are displayed on the screen populated with the data fields selected and formatted by the user. View your labels to verify that they are formatted correctly.

Acosta, Antanika 10 4561 E William St *** Wise NC 28610 0 (919)000-3313	Schreiber, Randy 10 3455 S Education Lane *** Wise NC 28650 0 Unlisted	Ortiz, Daniel 10 2694 East Groveland St. *** Wise NC 28650 0 (919)000-5224
Wise NC 28650 0 (919)000-9161 Grant, Chester 10 510 Saint James Place ***	Rivenbark, Arthur 10 411 S Education Lane *** Wise NC 28650 0 (919)000-1579	Blackburn, Dominic 10 2935 S Education Lane *** Wise NC 28658 0 (919)000-2054
Waddell, Nathaniel 10 5103 Saint James Place F10 Wise NC 28610 0 (919)000-5143	Martinez Jr, Jim 10 4812 S Education Lane *** Wise NC 28658 0 (919)000-1567	Brock, Jake 10 310 S Education Lane F10 Wise NC 28650 0 (919)000-1548

**Step 5 of 6**

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[➡ Next: Complete the merge](#)  
[⬅ Previous: Arrange your labels](#)

**Step 5: Completing the Merge**

To complete the merge:

1. Select Step 5 – Next: **Complete the merge** link at the bottom right corner of the screen.
2. In the Menu Bar, select **File > Save As** to save the new labels. As mentioned in the previous steps, insert the name that you want to appear for the labels (for example, “Final 10<sup>th</sup> Grade Labels.doc”). The file extension will automatically be added if the **File Save as** field is set to **Word Document**.

**Note:** At this point in the process, it is recommended that before you print the entire job, you only print one page of the labels onto plain paper. Hold it up to the light with a sheet of the labels lined up behind the printout. Verify all data lines up correctly. If it does not, open the label document and reformat either the label size or type.

## Additional Label Examples

Listed below are some examples of other types of labels that can be created using exported data from eSIS.

### Mailing labels for all ninth grade students

To the Parent / Guardian of: Cohen, James Anthony 617 N Main St Wake Forest, NC 27587	To the Parent / Guardian of: Miller , Michael Jason 610 N Main St Wake Forest, NC 27587	To the Parent / Guardian of: Sutay, Kevin Scott 617 N Main St Wake Forest, NC 27587
To the Parent / Guardian of: Weathersby, Cassidy Arin 610 N Main St Wake Forest, NC 27587	To the Parent / Guardian of: Utt, Nicole C 619 N Main St Wake Forest, NC 27587	To the Parent / Guardian of: Smith, Alisha L 617 N Main St Wake Forest, NC 27587
To the Parent / Guardian of: Pickard, Kyle Thomas 619 N Main St Wake Forest, NC 27587	To the Parent / Guardian of: Baker, Andrew Kevin 617 N Main St Wake Forest, NC 27587	To the Parent / Guardian of: Collins A, Jomarcus D 616 N Main St Wake Forest, NC 27587
To the Parent / Guardian of: Strickland, Matthew H 610 N Main St Wake Forest, NC 27587	To the Parent / Guardian of: Shaw, Stephanie 619 N Main St Wake Forest, NC 27587	To the Parent / Guardian of: Kornaus, Dinh 617 N Main St Wake Forest, NC 27587
To the Parent / Guardian of: Laufer, Timothy D 619 N Main St Wake Forest, NC 27587	To the Parent / Guardian of: Riley, Pamela Ruth 610 N Main St Wake Forest, NC 27587	To the Parent / Guardian of: Kehler, Tanya Marie 610 N Main St Wake Forest, NC 27587
To the Parent / Guardian of: Johnson, Summer Diane 610 N Main St Wake Forest, NC 27587	To the Parent / Guardian of: Young, Joseph 619 N Main St Wake Forest, NC 27587	To the Parent / Guardian of: Williams, Arron Richard 610 N Main St Wake Forest, NC 27587

### File folder labels with student's name and address

Cohen, James Anthony 617 N Main St Wake Forest, NC 27587
Miller , Michael Jason 610 N Main St Wake Forest, NC 27587
Sutay, Kevin Scott 617 N Main St Wake Forest, NC 27587

Index Card with sample added text – “Homeroom, Student Phone & Parent Phone”

<p>Cohen, James <u>Anthony 42668</u> GR 09 Homeroom 622          617 N Main St          Wake Forest, NC 27587</p> <p>Student Phone (919)821-2123</p> <p>Parent Phone</p>
--

1.63” for round or square labels with student’s name and address.

<p>Cohen, James          Anthony          617 N Main St          Wake Forest, NC          27587</p>	<p>Miller , Michael Jason          610 N Main St          Wake Forest, NC          27587</p>
<p>Utt, Nicole C          619 N Main St          Wake Forest, NC          27587</p>	<p>Smith, Alisha L          617 N Main St          Wake Forest, NC          27587</p>

Identification Card format.

<p>Cohen, James <u>Anthony 42668</u> GR 09          Homeroom # 622</p> <p>(919)821-2123</p> <p>617 N Main St          Wake Forest, NC 27587</p>
---

Fold over Name Tent (Actual size – 1.75” x 7.5”)

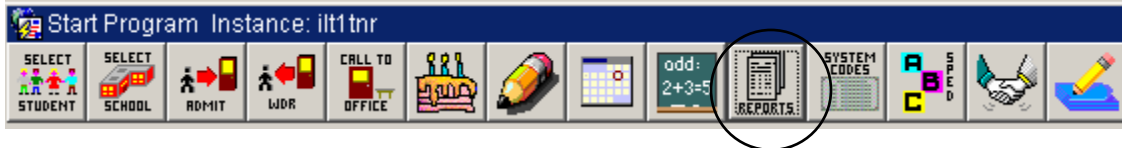
<p>Cohen, James <u>Anthony 42668</u> GR 09</p> <p>(919)821-2123</p> <p>617 N Main St          Wake Forest, NC 27587</p>
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## Creating Specific Labels

There are specific labels available in eSIS that may be generated based on demographic extract information. To generate these labels, the process is the same as discussed previously in this document with the exception that data does not have to be exported, and there is no need for the use of Microsoft Excel® and/or Microsoft Word®.

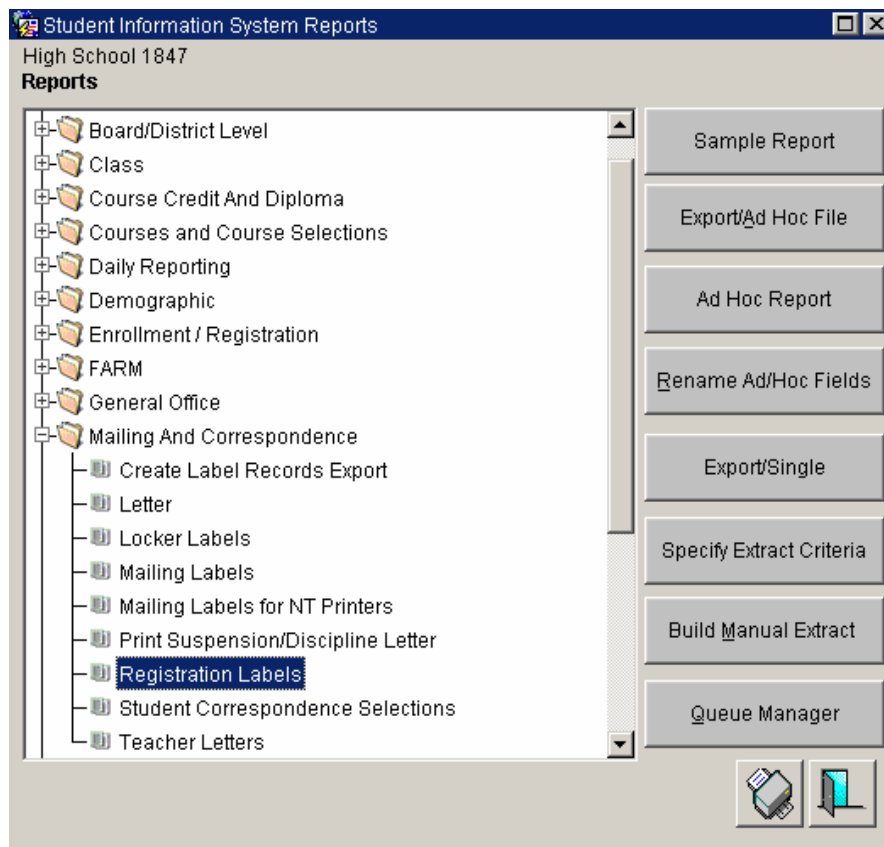
To create labels in eSIS:

1. Click the **Reports** icon on the **eSIS Main Start** screen.



2. The **Student Information System Reports** screen appears. Expand the **Mailing and Correspondence Report Group**.

### Student Information System Reports screen



3. Double click the canned label to be created (for example, **Registration Labels**, **Mailing Labels**, **Locker Labels**, etc).

4. Click the **Specify Extract Criteria** button on the **Student Information System Reports** screen. Follow the instructions included in Step 2 in order to produce a data extract containing students needed to appear on the labels.
5. The **Registration Labels** parameter form displays, allowing the user to make selections.

### Registration Labels parameter form

The screenshot shows a window titled "Registration Labels" with the following fields and controls:

- School: High School 1847
- School Year: 2003/2004
- Extract: 2004-07-28 08:38 AM
- Home Room Semester: 1 (dropdown menu)
- Home Room Term: (empty dropdown menu)
- Report Title: Registration Labels (text input field)
- Sort: Alpha (dropdown menu)
- Print in background?: No (dropdown menu)
- Printer icon and Adobe Acrobat Reader icon

6. Select the appropriate parameters from the drop-down fields. In this example, the **Home Room Semester** chosen is **1** and the **Sort** method is **Alpha**.
7. Click the **Print** button to preview the labels in Adobe Acrobat Reader®.