

Tutorial

Objective: Creating a Spreadsheet from the Data source for a Standard WORD Document

Step 1: Open **People/Listing** tab.

- a. Create a **Filter** for information that you would like to contain in your Spreadsheet. For this tutorial we will create a filter that contains people with the last name “Smith” whose affiliation is “Your Health.”
- b. Click the **Reports** tab. (Fig. A)

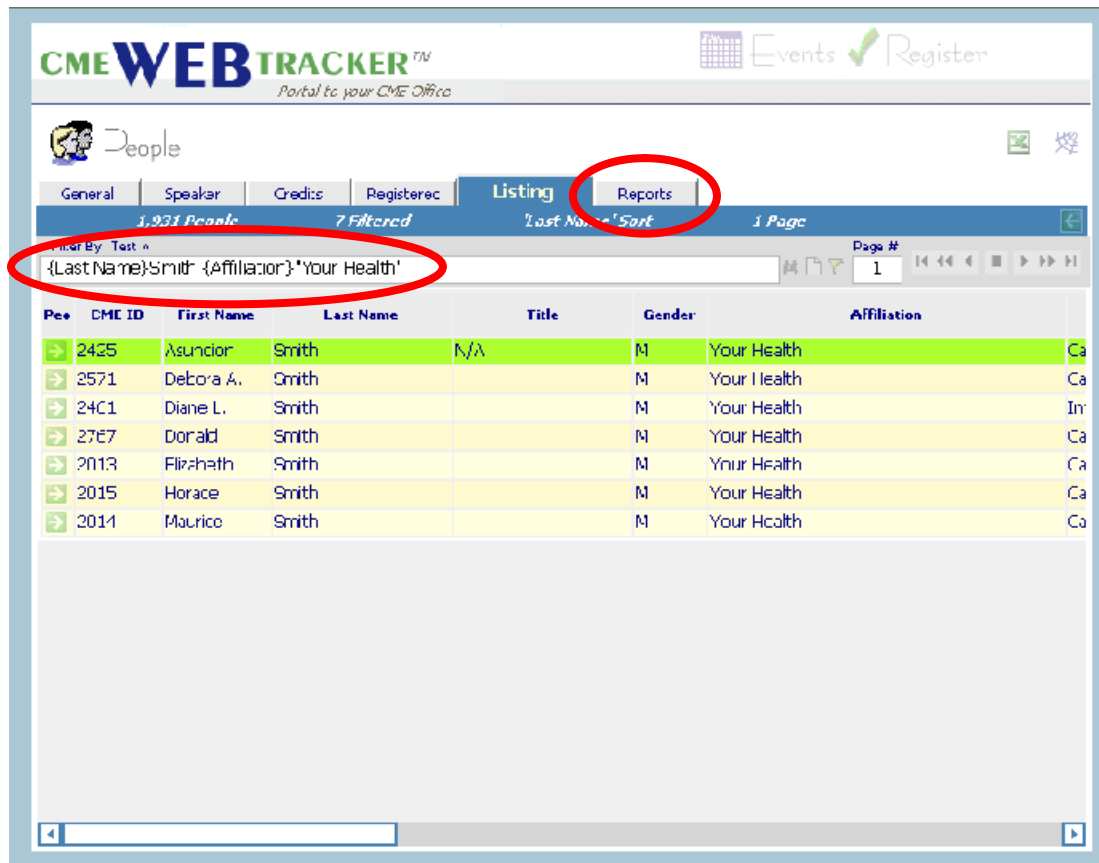


Fig. A

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Note: We will be using the WORD Report “Mailing Labels-Primary”, but you may use any Standard Word Document.

Step 2: Click to highlight the “**Mailing Labels-Primary**” report.

- a. Click the **radio button** next to **Test**. (This will be your filter. If you don't click on this radio button the report will run for ALL people in the listing!)
- b. Click the **Word Process Document Icon**. (Fig. B)

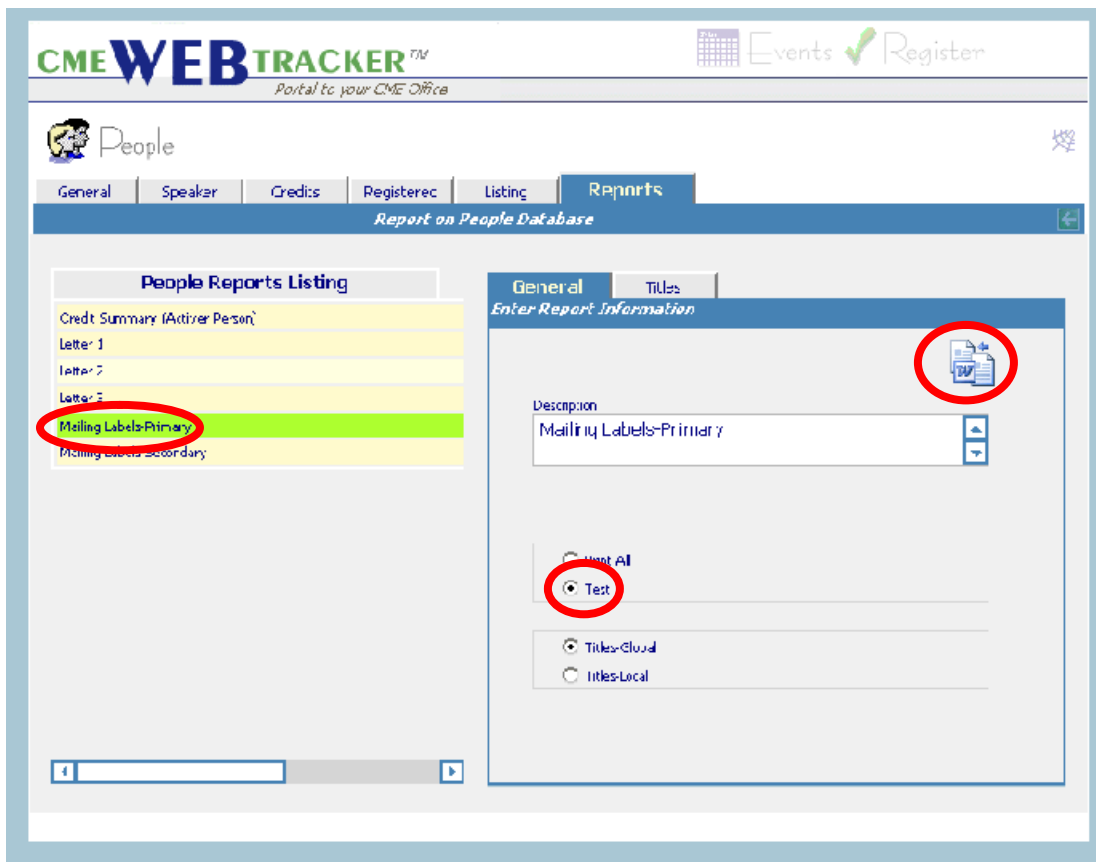


Fig. B

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Step 3: The **File Download** popup appears.

- a. Click **Save**. (Fig. C)

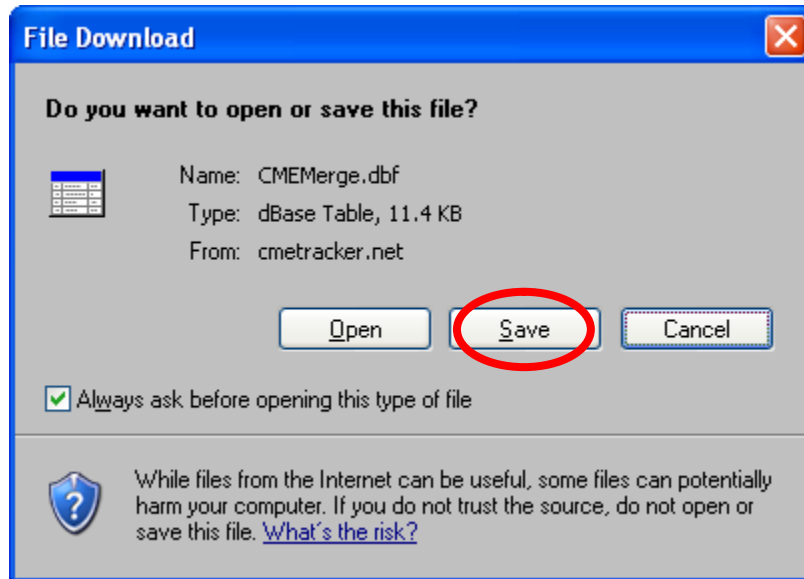


Fig. C

Step 4: The **Save As** popup appears.

- a. Click **Desktop** from the dropdown list.
- b. Click **Save**. (Fig. D)

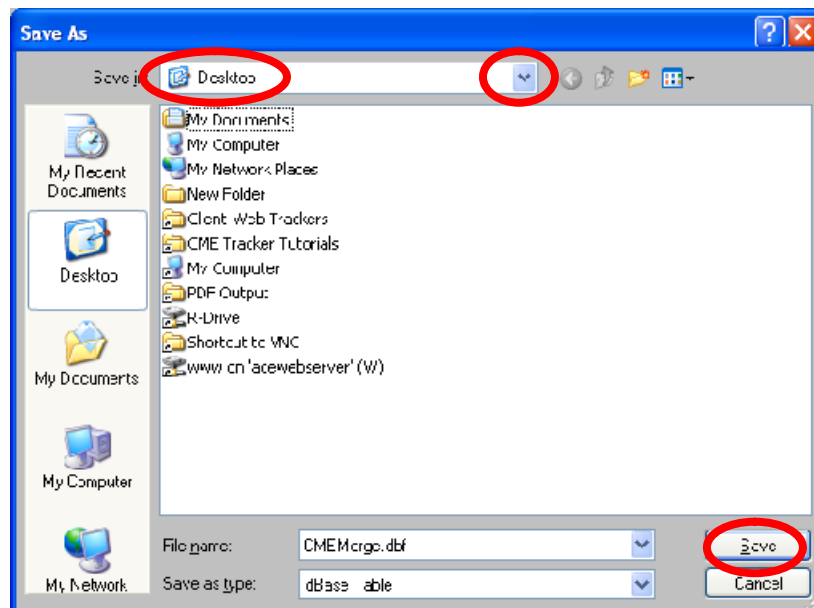


Fig. D

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Step 5: Right click on the **CMEMerge.dbf** icon that is now found on your desktop. (Fig.E)



Fig. E

Step 6: A popup appears.
a. Highlight **“Open With”**.
b. Click **“Microsoft Excel for Windows”**. (Fig.E)

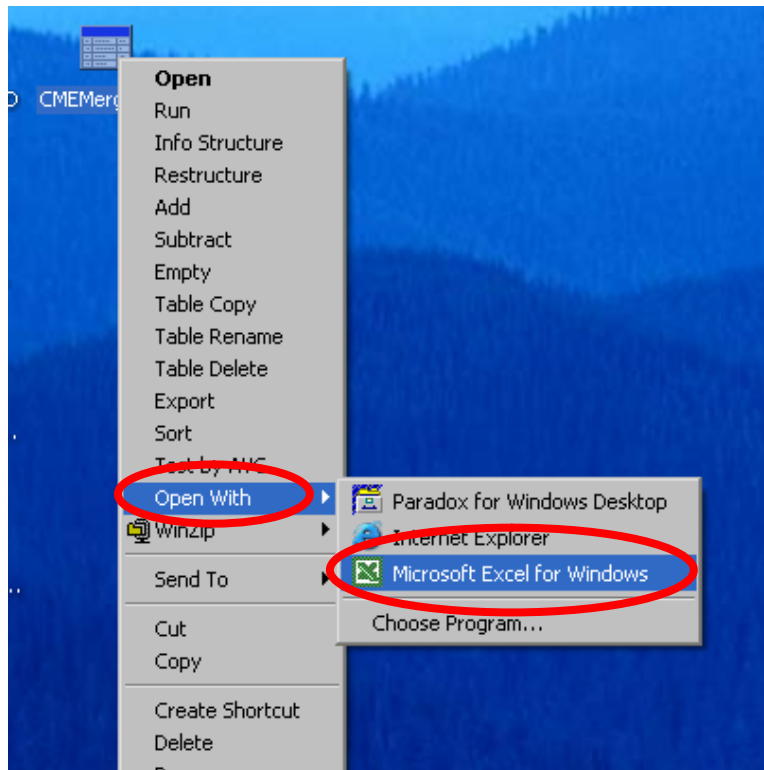


Fig. F

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Result: You now have an **Excel** spreadsheet created from the data source for a standard **Word Document**. (Fig. G)

	D	E	F	G	H	I
1	ATTENDEE_T	EADDE_NAME	BIRTH_DATE	BIRTH_PLACE	CME_ID	CITY
2	Physician	Mr. S. M's. Smith	#####	Some City, XX	2425	Some City
3	Physician	Dr. & Mrs. Smith	#####	Some City, XX	2421	Some City
4	Physician	Dr. & Mrs. Smith	#####	Some City, XX	2401	The City
5	Physician	Dr. & Mrs. Smith	#####	Some City, XX	2414	Some City
6	Physician	Dr. & Mrs. Smith	#####	Some City, XX	2413	Some City
7	Physician	Dr. & Mrs. Smith	#####	Some City, XX	2410	Some City
8	Physician	Dr. & Mrs. Smith	#####	Some City, XX	2414	Some City
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Fig. G