Using Mail Merge to Print Spine Labels from Evergreen

These instructions are to print spine labels on label stock for laser or desk jet printers using Mail Merge in MS Word 2010. The initial set-up in Mail Merge is time consuming; however, you can save the file and not have those steps every time. These instructions assume familiarity with Evergreen spine label printing functionality and do not fully illustrate those steps.

Creating a spine label file in Evergreen 2.1

Populate Item Status (F5) with barcodes of items needing spine labels. You can do this by:

- Scanning barcodes directly into Item Status (F5).
- Uploading a file of barcodes created from a report.
- Transferring from an Item Bucket.

Whichever method you use, make sure **Trim List** box is unchecked. If you have nonstandard barcodes, make sure **Strict Barcode** is unchecked.

Highlight all entries.

Right click or choose Actions for Catalogers or Actions for Selected Items then, Print Spine Labels.

It may take a few moments for a large file to open in the **Print Spine Label** interface.

Make sure your settings are correct and that **Pocket Labels** are not **Enabled**. **Re-generate** if you make any changes.

Click on the **Preview and Print** button.

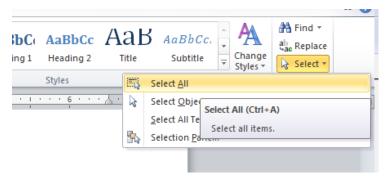
Click somewhere in the white space of the printing preview screen, then press **CTRL+A** to highlight the entire group and then **CTRL+C** to copy.

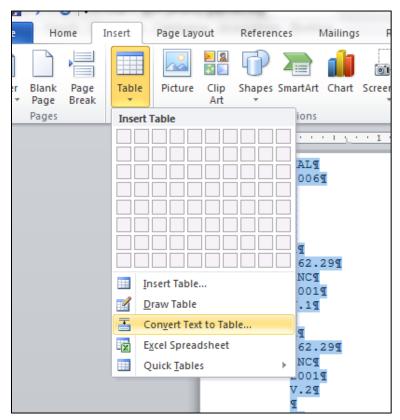
Setting up a spine label file in MSWord 2010

Open MSWord.

Paste file of call numbers copied from Evergreen's spine label preview screen.

Select all either using CTRL+A or Select, then Select All:





With the contents highlighted, go to the Insert tab, Table, Convert Text to Table:

Make sure **Paragraphs** under **Separate text at** is selected and change the number of columns to an appropriate number (This should conform to the number of lines set in **Label Length** in the Evergreen **Spine Label Printing** interface.):

R¶	
362.29¶	
ENC¶	
2001¶	
V.19	Convert Text to Table 2
P	Convert Text to Table
R¶	Table size
362.29¶	Table size
ENC¶	Number of <u>c</u> olumns: 6
2001¶	
V.2¶	Number of rows: 41
P	AutoFit behavior
J¶	
613.85¶	I ● Fixed column width: Auto
EVA¶	AutoFit to contents
2009¶	
P	AutoFit to window
T	Constate tout at
J¶	Separate text at
641.84¶	Paragraphs O Commas
BLA¶	○ Tabs ○ Other:
2009¶	
T	
T	OK Cancel
E¶	
EDW¶	
2009¶	

MAL¤	2006¤	×	¥	¥	¥	×
R¤	362.29×	ENC¤	2001¤	V.1×	Ħ	×
R¤	362.29¤	ENC¤	2001¤	V.2¤	Ħ	¥
Ĵ¤	613.85×	EVA¤	2009×	×	Ħ	¥
Ĵ¤	641.84¤	BLA¤	2009×	¥	¥	¥
E¤	EDW¤	2009×	Ħ	¥	¥	×
070.4¤	KIN¤	2010¤	×	×	×	¥
R¤	394.2¤	HAT¤	Ħ	Ħ	Ħ	×
DVD¤	970¤	TRA¤	2009¤	×	Ħ	¥
DVD¤	COW¤	2008×	V.22×	¥	¥	×
DVD¤	COW×	2008×	V.10×	×	×	×
DVD¤	COW¤	2008×	V.9¤	Ħ	Ħ	×
DVD¤	COW¤	2008×	V.8¤	¥	Ħ	¥
DVD¤	COW¤	2008×	V.7¤	¥	¥	Ħ
DVD¤	COW¤	2008×	V.6×	×	¥	Ħ
DVD¤	COW×	2008×	V.5×	×	×	¥
DVD¤	COW¤	2008×	V.4¤	Ħ	Ħ	×
DVD¤	COW¤	2008¤	V.3¤	Ħ	Ħ	×
DVD¤	COW¤	2008×	V.2¤	Ħ	Ħ	×
DVD¤	COW¤	2008×	V.24×	Ħ	Ħ	×
DVD¤	COW×	2008×	V.23¤	Ħ	Ħ	×
DVD¤	COW×	2008×	V.21¤	Ħ	Ħ	¥
DVD¤	COW¤	2008¤	V.20×	Ħ	Ħ	×
DVD¤	COW¤	2008×	V.19¤	Ħ	Ħ	×
DVD¤	COW×	2008×	V.18¤	Ħ	¥	Ħ
DVD¤	COW×	2008×	V.17¤	Ħ	Ħ	×
DVD¤	COW¤	2008¤	V.16¤	Ħ	Ħ	×
DVD¤	COW¤	2008×	V.15×	Ħ	Ħ	×
DVD¤	COW¤	2008×	V.14¤	Ħ	Ħ	¥
DVD¤	COW×	2008×	V.13¤	Ħ	Ħ	×
DVD¤	COW¤	2008¤	V.12¤	Ħ	Ħ	×
DVD¤	COW¤	2008¤	V.11¤	Ħ	Ħ	×
DVD¤	COW¤	2008×	V.1¤	¥	¥	×
R¤	382¤	NOR¤	1997¤	Ħ	Ħ	×
R¤	423¤	OFF¤	1933¤	¥	¥	Ħ
R¤	911×	OLIN	×	×	×	¥

Your file will now look something like this:

Insert an empty row at the top of the table:

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- X	Cu <u>t</u>			E	NC¤	2001¤	
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-	Delete Rows			ŀ	Insert Columns to	o the <u>R</u> ight -	_
-	Sele <u>c</u> t	F			Insert Rows Abo	/e	-
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- 📑	Distribute Rows Evenly				Insert Cells	-	_
- 🔛	Distribute Columns Evenly			_	.008×	V.6×	-
				2	008×	V.5¤	
- 🗋	Borders and Shading			2	2008¤	V.4¤	
	Text Direction			2	×800	V.3¤	
	Cell Alignment	►			2008×	V.2¤	
	-				2008¤	V.24¤	
	<u>A</u> utoFit	•			2008¤	V.23¤	
	Table Properties				×800	V.21¤	
5.5			1	2	2008×	V.20¤	

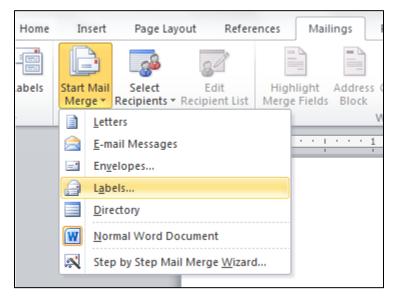
Make any format changes to your call numbers and delete blank columns.

Save the document. Remember what you named it and where you saved it. You can save over any file used previously or give it a new name each time.

Setting up Mail Merge in MS Word

Open a new MSWord document.

Go to Mailings, Start Mail Merge, and then Labels:



Set up your labels, based on the stock you are using, in **New Labels**. For example:

abel Options	Label Details		1.1.1	8 ×
Printer information	Preview			
Continuous-feed printers		Side margir	ns	
Page printers <u>T</u> ray: Stack Bypass		Top margin	orizontal pitch	
Label information		Ť II		
Label vendors: Other/Custom	-	Vertical pitch	/idth→ Number do Heighi	wn
Find updates on Office.com				
Product number:		* }	-*	
ID strips			imber across	
Spine label test				
	Label name:	Spine label test		
	Top margin:	0.1"	Label h <u>e</u> ight:	1.5" 🚖
Details New Label Delete	Side margin:	0.1"	Label <u>w</u> idth:	1"
	Vertical pitch:	1.5" ≑	Number <u>a</u> cross:	8
	Horizontal pitch:	1"	Number <u>d</u> own:	7 🚖
	Page size:	Letter (8 ½ x 11	in)	-
	Page width:	8.5"	Page <u>H</u> eight:	11" ×
			ОК	Cancel

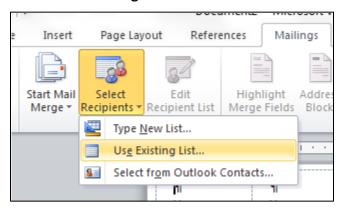
Click on **OK** when you are done. Once you set up the stock you will see the name in the **Label Options** window under **Other/Custom**:

Printer information					
Continuous-fe					
Page printers	<u>I</u> ray:	Stack Bypass		•	
abel information					
Label vendors:	Other/Custo	m	•		
Find updates on Of	ffice.com				
Product number:			Label info		
ID strips Spine label test			 Type: Height: 	Custom laser	
			Width:		
			Page size	: 8.5" × 11"	
Details	New Label	Delete		OK	Cancel

Clicking on **OK** loads the labels.

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Next, you want to load the call number file you saved previously. From **Select Recipients** choose **Use Existing List**:

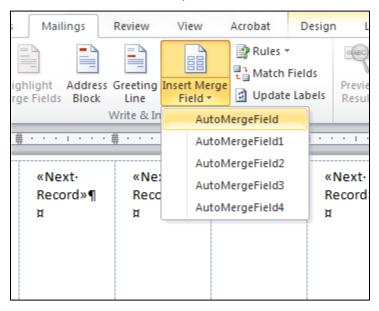


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Your file will now look similar to:

ku H	«Next• Record»¶ ष्र	«Next• Record»¶ ដ	«Next• Record»¶ ដ	«Next• Record»¶ ដ	«Next• Record»¶ ដ	«Next• Record»¶ ¤	«Next• Record»¶ ដ	Ħ
«Next-	«Next-	«Next∙	«Next-	«Next∙	«Next-	«Next-	«Next-	¤
Record»¶	Record»¶	Record»¶	Record»¶	Record»¶	Record»¶	Record»¶	Record»¶	
ਸ਼	¤	¤	¤	¤	¤	پ	¤	
«Next-	«Next-	«Next∙	«Next-	«Next-	«Next-	«Next-	«Next-	¤
Record»¶	Record»¶	Record»¶	Record»¶	Record»¶	Record»¶	Record»¶	Record»¶	
দ্র	ম	¤	¤	ম	¤	¤	দ্র	
«Next-	«Next•	«Next∙	«Next•	«Next•	«Next	«Next-	«Next-	¤
Record»¶	Record»¶	Record»¶	Record»¶	Record»¶	Record»¶	Record»¶	Record»¶	
¤	ष्र	¤	ष्र	ष्र	¤	¤	ष्र	

Next, from **Insert Merge Field**, insert each **AutoMergeField** listed. The number present will be the number of columns in your saved document.



Once they are added, your file will now look similar to this:

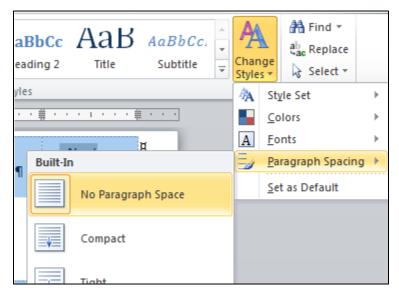
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«AutoMe	«Next-	«Next·	«I
rgeField»	Record»¶	Record»¶	Re
«AutoMe	¤	¤	¤
rgeField1			
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ergeField			
2»«Auto			
MergeFiel			
«Next-	«Next-	«Next-	«
Record»¶	Record»¶	Record»¶	Re
¤	¤	¤	¤

Highlight the whole document by highlighting the rows of the table at the top. The gold **Table Tools** tab will appear when you have it highlighted correctly:

Docu	ment2 - Microsoft W	ord	100 Mar 10 - 10 - 10	Table Tools	and and			
out Refere	nces Mailings	Review View	Acrobat	Design Layout				
Edit Recipient List erge	Highlight Merge Fields Block	Greeting Insert Me Line Field Write & Insert Field	s 🖞 Update La	abels Results P	Auto Check for Ereview Results	Finish & Merge * Finish	Merge to Adobe PDF Acrobat	
«AutoM rgeField «AutoM rgeField »«Autol ergeFiel 2»«Auto	> Record>¶ le ¤ 1 d	«Next- Record»¶ ष्र	«Next- Record»¶ म्र	«Next- Record»¶ স	«Next- Record»¶ ¤	«Next- Record»¶ म्र	«Next Record»¶ ¤	Ø
«Next- Record» بع	«Next	«Next- <u>Record»</u> ¶ ¤	«Next- Record»¶ لا	«Next- Record»¶ ¤	«Next- Record»¶ ¤	«Next- Record»¶ म्र	≪Next∙ Record»¶ ¤	Ø

Click the Home Tab. And go to Change Styles:



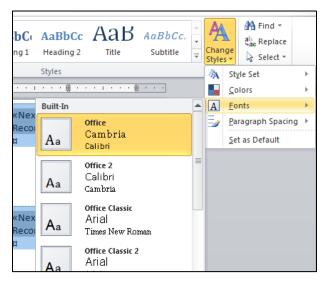


From there, go to **Paragraph Spacing** and then **No Paragraph Space**:

You may have to make changes under **Custom Paragraph Spacing** if too much space is between the lines in your document:

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Built-In		E	P
	No Paragraph Space		<u>s</u>
	Compact		
	Tight		
—	Open		
	Relaxed		
_	Double		
<u>C</u> u	stom Paragraph Spacing		
н			

You can also choose the font and size you want to use from the **Change Styles** area:



Once you have made your changes, Return to the **Table Tools** tab and click on **Layout** and choose **Align Center Left**:

Table Tools Design Layout		
Height: 1.5° +	Distribute Rows	Cell Sort
«Next- »¶ Record»¶	«Next «Nt the left side of the Record» Record» Record» Record Rec	cell.

Click inside the first label at the end of the last AutoMergeField (you may have to enlarge the row to see it):

«AutoMe rgeField» «AutoMe rgeField1 »«AutoM ergeField 2»«Auto MergeFiel d3»«Auto MergeFiel d4»¶ ¤	«Next∙ Record»¶ ¤	«Next∙ Record»¶ ¤
«Next- Record»¶	«Next- Record»¶	«Next· Record»¶
a Kecolu»¶	a Kecola »¶	Kecora»¶ ¤

Press the delete key to take out the last blank row.

Now move the cursor in between each of the AutoMergeFields and press Enter:

.4.		
	«AutoMe rgeField»¶	e F
	«AutoMe rgeField1 »¶	r
	«AutoMe rgeField2 »¶	
	«AutoMe rgeField3 »«AutoM ergeField	
	«Next· Record»¶	¢ F

Your label should look similar to this:

			·
«AutoMe rgeField»¶	«Next· Record»¶	«Next• Record»¶	«Ne Reco
«AutoMe rgeField1 »¶	¤	¤	¤
«AutoMe rgeField2 »¶			
«AutoMe rgeField3 »¶			
«AutoMe rgeField4 »¤			
«Next∙ Record»¶ ¤	«Next∙ Record»¶ ¤	«Next• Record»¶ ष्र	«Ne Reci ¤

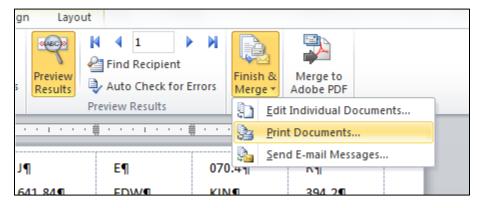
Click back on the **Mailings** tab and then **Update Labels**. Your labels should now look like similar to this:

ut	Referenc	es Mailings	Review View		Design Layou				
	Edit pient List N	Highlight Addres Aerge Fields Block	s Greeting Insert Me	Rules *	Ids Preview	Find Recipient	Finish & Merge +	Merge to Adobe PDF	
ge	pierie eise in	lergerields block	Write & Insert Field			Preview Results	Finish	Acrobat	
#	<u></u>	<u>2</u> ∰ + + + + + + +	• # • • • • • • • • •		# · · · 1 · · ·	# • • • • • • • •		# • • • • • • •	
•	«AutoMe	«Next·	«Next·	«Next·	«Next·	«Next-	«Next·	«Next-	¤
	rgeField»	Record»«	Record»«	Record»«	Record»«	Record»«	Record»«	Record»«	
	«AutoMe	AutoMerg	AutoMerg	AutoMerg	AutoMerg	AutoMerg	AutoMerg	AutoMerg	
	rgeField1	eField»¶	eField»¶	eField»¶	eField»¶	eField»¶	eField»¶	eField»¶	
	»¶	«AutoMe	«AutoMe	«AutoMe	«AutoMe	«AutoMe	«AutoMe	«AutoMe	
	«AutoMe rgeField2	rgeField1 »¶	rgeField1 »¶	rgeField1 »¶	rgeField1 »¶	rgeField1 »¶	rgeField1 »¶	rgeField1 »¶	
	»¶	«AutoMe	«AutoMe	«AutoMe	«AutoMe	«AutoMe	«AutoMe	«AutoMe	
		rgoEiold2	rgeField2	rgeField2	rgeField2	rgeField2	rgeField2	rgeField2	
	«AutoMe rgeField3	»¶	»¶	»«	»¶	»¶	»¶	»«	
	»¶	«AutoMe	«AutoMe	«AutoMe	«AutoMe	«AutoMe	«AutoMe	«AutoMe	
	«AutoMe rgeField4	rgeField3 »¶	rgeField3 »¶	rgeField3 »¶	rgeField3 »¶	rgeField3 »¶	rgeField3 »¶	rgeField3 »¶	
	»¤	«AutoMe	«AutoMe	«AutoMe	«AutoMe	«AutoMe	«AutoMe	«AutoMe	
	«Next·	«Next·	«Next·	«Next·	«Next·	«Next·	«Next·	«Next-	¤
	Record»«		Record»«	Record»«	Record»«	Record»«	Record»«	Record»«	
	AutoMerg eField»¶	g AutoMerg eField»¶	AutoMerg eField»¶	AutoMerg eField»¶	AutoMerg eField»¶	AutoMerg eField»¶	AutoMerg eField»¶	AutoMerg eField»¶	
	«AutoMe	«AutoMe	«AutoMe	«AutoMe	«AutoMe	«AutoMe	«AutoMe	«AutoMe	
	rgeField1 »¶	rgeField1 »¶	rgeField1 »¶	rgeField1 »¶	rgeField1 »¶	rgeField1 »¶	rgeField1 »¶	rgeField1 »¶	
	«Next-	«Next-	«Next	«Next-	«Next·	«Next-	«Next	«Next-	¤
	Record»«		Record»«	Record»«	Record»«	Record»«	Record»«	Record»«	
	AutoMerg eField»¶	AutoMerg eField»¶	AutoMerg eField»¶	AutoMerg eField»¶	AutoMerg eField»¶	AutoMerg eField»¶	AutoMerg eField»¶	AutoMerg eField»¶	
	«AutoMe	«AutoMe	«AutoMe	«AutoMe	«AutoMe	«AutoMe	«AutoMe	«AutoMe	
	rgeField1 »¶	rgeField1 »¶	rgeField1 »¶	rgeField1 »¶	rgeField1 »¶	rgeField1 »¶	rgeField1 »¶	rgeField1 »¶	

ut Refere	nces Mailings	Review View	Acrobat	Design Layout				
Edit Recipient List ge	Merge Fields Block	Greeting Insert Me Line Field	s 🖞 Update L	elds abels	Auto Check for Preview Results	Finish	Merge to Adobe PDF Acrobat	· # · ·
MAL¶	R¶	R¶	٩L	٩L	E¶	070.4¶	R¶	¤
2006¶ ¶ ¤	362.29¶ ENC¶ 2001¶ V.1¤	362.29¶ ENC¶ 2001¶ V.2¤	613.85¶ EVA¶ 2009¶ ¤	641.84¶ BLA¶ 2009¶ ¤	EDW¶ 2009¶ ¶ ¤	KIN¶ 2010¶ ๆเ ¤	394.2¶ HAT¶ ¶ ¤	
DVD¶ 970¶ TRA¶ 2009¶ ¤	DVD¶ COW¶ 2008¶ V.22¶ ¤	DVD¶ COW¶ 2008¶ V.10¶ ¤	DVD¶ COW¶ 2008¶ V.9¶ ¤	DVD¶ COW¶ 2008¶ V.8¶ ¤	DVD¶ COW¶ 2008¶ V.7¶ ¤	DVD¶ COW¶ 2008¶ V.6¶ ¤	DVD¶ COW¶ 2008¶ V.5¶ ¤	¤
DVD¶ COW¶ 2008¶ V.4¶ ¤	DVD¶ COW¶ 2008¶ V.3¶ ¤	DVD¶ COW¶ 2008¶ V.2¶ ¤	DVD¶ COW¶ 2008¶ V.24¶ ¤	DVD¶ COW¶ 2008¶ V.23¶ ¤	DVD¶ COW¶ 2008¶ V.21¶ ¤	DVD¶ COW¶ 2008¶ V.20¶ ¤	DVD¶ COW¶ 2008¶ V.19¶ ¤	¤
DVD¶ COW¶ 2008¶ V.18¶ ¤	DVD¶ COW¶ 2008¶ V.17¶ ¤	DVD¶ COW¶ 2008¶ V.16¶ ¤	DVD¶ COW¶ 2008¶ V.15¶ ¤	DVD¶ COW¶ 2008¶ V.14¶ ¤	DVD¶ COW¶ 2008¶ V.13¶ ¤	DVD¶ COW¶ 2008¶ V.12¶ ¤	DVD¶ COW¶ 2008¶ V.11¶ ¤	¤
DVD¶	R¶	¤						

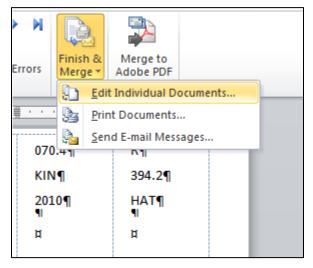
Click **Preview Labels** to view all your labels:

If no formatting or other changes need to be made to the labels, you are ready to print. Under **Mailings**, go to **Finish & Merge**, then **Print Documents**:



A dialog box will open allowing you to print the entire file or individual records (call numbers). Choose **All** and then **OK**. You can then choose your printer and print.

If you need to make changes to any of the call numbers, click **Finish & Merge** and then **Edit Individual Documents**, **All**:



A new screen will open with an editable version of your call number file. After you have made your edits, print from the **File** tab:

File	Home Insert	Page Layout	References	Mailings	Review	View	Acrobat	Design
📄 Sa 🐼 Sa 🔊 Sa 🎯 Oj	we As we as Adobe PDF	Print	Print Copies:	L ‡			MAL 2006	R 362.29 ENC
📄 ci	ose	Printer			()			2001 V.1
Info		Canon	6570 PS3 on TR	EVOR	•		DVD	DVD
Recen	ıt			Print	er Properties		970	COW
New		Settings					TRA 2009	2008 V.22
Print			II Pages he entire docum	ent	•		DVD	DVD
Save a	& Send	Pages:			0		cow	cow
Help			ne Sided rint on one side	of the page	•		2008 V.4	2008 V.3
i o	ptions	Collate 1,2,3	ed 1,2,3 1,2,3		•			
🔀 Ex	it	늘 No Sta			•		DVD COW 2008	DVD COW 2008
		Portrai	t Orientation		•		V.18	V.17

Close that window after printing and go back to the Mail Merge file and save it. Saving the file allows you to re-use the formatting steps, so remember the name and where you saved it.

Printing spine labels once Mail Merge is set-up

Once you have set-up and saved the Mail Merge file in MSWord 2010, you can re-use it to print subsequent labels so that you do not have to go through the laborious set up each time. You do have to set up the label file in Evergreen and MS Word following the instructions in the sections "Creating a Spine Label File in Evergreen" and "Setting up a spine label file in MSWord 2010" It is very important to use the same number of columns as in your first file in each of your subsequent files to prevent problems with auto merge fields in Mail Merge.

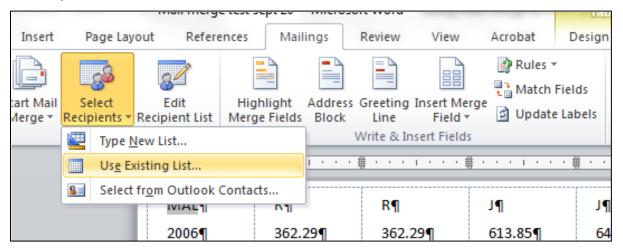
Open MSWord and the file for Mail Merge you saved earlier. A dialog box warning you that the SQL commands for the Mail Merge will run on the file will open. Click **Yes**:

Microsoft	Word
<u>^</u>	Opening this document will run the following SQL command: SELECT * FROM P:\PINES\Evergreen\Spine label printing\Testing mail merge\spine pocket label test sept 20.docx Data from your database will be placed in the document. Do you want to continue? Show Help >>
	Yes No Help

Your formatted file will open:

MAL	R¶	R¶	٦٩	٦¶	E¶	070.4¶	R¶	p
2006¶	362.29¶	362.29¶	613.85¶	641.84¶	EDW¶	KIN¶	394.2¶	
1	ENC¶	ENC¶	EVA¶	BLA¶	2009¶	2010¶	HAT¶	
¤	2001¶	2001¶	2009¶	2009¶	¶ ¤	¶ ¤	¶ g	
	V.1¤	V.2¤	¤	¤	[°]		Î	
DVD¶	DVD¶	DVD¶	DVD¶	DVD¶	DVD¶	DVD¶	DVD¶	þ
970¶	cow¶	cow¶	cow¶	cow¶	cow¶	cow¶	cow¶	
TRA¶	2008¶	2008¶	2008¶	2008¶	2008¶	2008¶	2008¶	
2009¶	V.22¶	V.10¶	V.9¶	V.8¶	V.7¶	V.6¶	V.5¶	
¤	¥	р	¥	¤	р	д	¤	
DVD¶	DVD¶	DVD¶	DVD¶	DVD¶	DVD¶	DVD¶	DVD¶	Þ
COW¶	COW¶	cow¶	COW¶	cow¶	COW¶	COW¶	COW¶	
2008¶	2008¶	2008¶	2008¶	2008¶	2008¶	2008¶	2008¶	
V.4¶	V.3¶	V.2¶	V.24¶	V.23¶	V.21¶	V.20¶	V.19¶	
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DVD¶	DVD¶	DVD¶	DVD¶	DVD¶	DVD¶	DVD¶	DVD¶	þ
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2008¶	2008¶	2008¶	2008¶	2008¶	2008¶	2008¶	2008¶	
V.18¶	V.17¶	V.16¶	V.15¶	V.14¶	V.13¶	V.12¶	V.11¶	
¤	¤	р	¤	¤	¤	д	¤	
DVD¶	R¶	R¶	R¶	R¶	R¶	R¶	R¶	ä

Next, open your current call number file. Under **Select Recipients**, go to **Use Existing List** and choose your file:



It will open looking similar to this:

×AutoMe	«Next·	«Next•	«Next·	«Next·	«Next·	«Next-	«Next·
rgeField»¶	Record»«						
«AutoMe	AutoMerg						
rgeField1	eField»¶						
»¶	«AutoMe						
≈1 «AutoMe rgeField2	rgeField1 »¶						
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