

How to avoid an Ugly Mailing List

Some of the least productive and most frustrating times of my IT Manager career came just after those fateful words, “I need to create mailing labels for 400 envelopes, and I can’t get it to work.” Unfortunately, these projects usually started when someone sat down and typed in 400 names and addresses on their computer, and ended (for them!) at my door because the format of the data was all wrong.

It might have been a beautiful mailing list to the person holding it—nice columns, and everything lined up and fitting a maximum number of addresses on a page, but to anyone who has had to re-format or re-enter it all so that it can be manipulated as *data*, well, it’s just plain ugly.

Computer programs like to be able to recognise data boundaries. Where does the first address end, and the second begin? Which part is the postal code? What happens if there are two e-mail addresses, or none? The most elementary way many programs do this is to say that an entity ends at the end of a “line”. Typically that’s a paragraph in Word, or a row in Excel. If someone has entered addresses so that each one flows across several paragraphs or rows, then many advantages are lost. Within a line, it’s really nice if there’s an unambiguous way to separate the pieces of data: first name, last name, the pieces of the address, phone numbers, e-mail addresses and so on.

If you have data in an ugly format, it’s probably worth your while to make it readable. If you’re just starting out, enter it the right way first time.

Try to imagine all of the ways the data will be used: mailing labels, a printed directory, a page on the internal web-site, emergency call list etc. Some of these uses will require extra data, which should be added from the start. For instance, the people on the emergency call list should be uniquely

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identified. If you want to address the envelope “Dr. John Smith”; have a personalised letter which starts “Dear John”, and the internal directory listing “Smith, Dr. John”, then you should separate the salutation, first name and last name.

If thinking about all of this is making your head spin, now may be a good time to buy your favourite IT person a coffee, and get some advice. If you’re hanging in there, the coffee thing may still pay off, because (a) it never hurts to have a friend in IT and (b) there might be some things you haven’t thought of.

Want to go further? OK, fasten your seat belt.

- Decide on which program you will use. Access is most flexible, but it has a learning curve, and not everyone has a copy, so if you’re sharing the data, others may have problems. (It’s beyond the scope of this short article to go into details on Access.) Excel is next best as a data repository, but may not be good for presenting results. Word presents well, but has less data handling. A good combination which most people can relate to is storing data on Excel and creating output with Word. In a pinch, create the data in a Word table; but someone will need to copy and paste it to a Excel spreadsheet before you can use it in a mail merge.
- Each row of data should refer to one *and only one* set of data. For example, one address.
- Each column should contain only one type of data. Don’t put a fax number in an e-mail address column because the person only has a fax. (You may want to add a “Notes” column for this kind of exception.)
- Make one column for each data element (e.g. Salutation, First Name, Last Name) that you will need and never enter more than one data element in a cell. If the person has two phone numbers, enter only the main one, and put the other in Notes. If you want to capture an unlimited number of possible phone numbers (home, business, cell, fax etc.) then you’re reading the wrong article. You need a database or contact manager!

If you follow these rules, you’ll be in good shape for your next step. Your IT guy will be impressed with your formatting if you go there for help, or if you start to delve into the “Mailings” tab in Word (2007) you won’t find that you’ve already shot yourself in the foot and wasted two days entering data in the wrong (ugly) format.