FAQ: How to create mass mailing with Mail Merge and Patron Record Set- Polaris, Excel, Microsoft Word 2010

You first want to create a Patron Record containing the information you wish you utilize for the mailing. [Ex. Using the PSTAT3 field to narrow down head of households in a library region.]

<u>Step One</u>: Go to the Patron Records Find Tool in the Polaris browser by clicking on the **Patron Services** tab and selecting **Patron Records**. You may also use the shortcut <u>F7</u> to access this tab.



<u>Step Two</u>: Search by preferred parameters. For this example, we used the *PSTAT3* field to isolate those patrons who were listed as the head of household in their residence. You could substitute for any field to suit your intended targets. You can narrow your results by using the limit by bar to concentrate on a single library or any other parameter you need.

General Setti	ings								
Object:	Patron Records	✓ Limit by: Patro	on's registered library	•	Search Mode Normal Power SQL		Search Stop New Search		
Search by:	PSTAT3		dor - Candor Free Library (C)						
Type:	Exact match (implicitly truncated)	Cinci	 Stewart B. Lang Memorial innatus - Kellogg Free Library 						
			land - Cortland Free Library (len - Southworth Library (DR		Count	Delu	Clear		
Sort by:	(None)	Fair	Fair Haven - Fair Haven Public Libra FLLS - Finger Lakes Library System			Count Only			
For:	head					Help			
			on - Groton Public Library (Gi	<u></u>					
Barcode	Name	Street	City	State	Zip	Library			
					Zip 13053		- Southw		
D2027064855	BLECK, SCHINELL		City	State	•	Dryden -	- Southw - Southw		
D2027064855 D2027033749	BLECK, SCHINELL TESORIERO, MELISSA		City DRYDEN	State NY	13053	Dryden - Dryden -			
D2027064855 D2027033749 D2027006085	BLECK, SCHINELL TESORIERO, MELISSA ELLINWOOD, MARIAN		City DRYDEN DRYDEN DRYDEN DRYDEN	State NY NY NY	13053 13053 13053	Dryden Dryden Dryden	- Southw - Southw		
Barcode D2027064855 D2027033749 D2027006085 D2027020172 D2027007560	BLECK, SCHINELL TESORIERO, MELISSA ELLINWOOD, MARIAN HANSON HAMES EVERETT, ANNE M		City DRYDEN DRYDEN DRYDEN DRYDEN FREEVILLE	State NY NY NY NY	13053 13053 13053 13053 13053 13068	Dryden - Dryden - Dryden - Dryden -	- Southw - Southw - Southw		
D2027064855 D2027033749 D2027006085	BLECK, SCHINELL TESORIERO, MELISSA ELLINWOOD, MARIAN HANSON HAMES EVERETT, ANNE M		City DRYDEN DRYDEN DRYDEN DRYDEN	State NY NY NY	13053 13053 13053	Dryden - Dryden - Dryden - Dryden -	- Southw - Southw		
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D2027064855 D2027033749 D2027006085 D2027006085 D2027007560 D2027101348	BLECK, SCHINELL TESORIERO, MELISSA ELLINWOOD, MARIAN HANSON HAME EVERETT, ANNE M ARNOLD, CAREN D BRANTLEY, CYNTHIA A		City DRYDEN DRYDEN DRYDEN FREEVILLE DRYDEN	State NY NY NY NY NY	13053 13053 13053 13053 13068 13053	Dryden - Dryden - Dryden - Dryden - Dryden - Dryden - Dryden -	- Southw - Southw - Southw - Southw		

Remember to press *CTRL* + *SHIFT* + *A* to access all the records that were found. If not, you will not be able to select all of them. <u>Step Three</u>: You can choose which records you would like to use or press CTRL+ALT+A to select all the records. Then right click to **Add to Record Set**, then **New**.

Type:	Exact match (implicitly truncated)		•	Cincinnatus - Kellogg Free Library (Cortland - Cortland Free Library (C			Count Only		Clear	
Sort by: (None) For: head		•	Dryden - Southworth Library (DRY) Fair Haven - Fair Haven Public Libra		RY I					
		d	•	PLLS - Finger Lakes Library System Groton - Groton Public Library (GRI		em	•		Help	
Barcode		Name	Street		City	State	Zip	Library		
020270648	55	BLECK, SCHINELL	2.		DRYDEN	NY	13053	Dryden -	Southw	P
D20270337	49	TESORIERO, MELISSA			DRYDEN		13053	Dryden -	Southw	
020270060	85	ELLINWOOD, MARIAN			DRYDEN		13053	Dryden -	Southw	
D20270701		HANSON, JAMES			DRYDEN		13053	Dryden -	Southw	
020270856		PALMER, FRANKLIN W			DRYDEN		13053	Dryden -	Southw	
020270885		RHINEHART, MARTHA			CORTLAND		13045	Dryden -	Southw	
D20271044	43	COOLEY, Ryan			NEWFIELD		14867	Dryden -	Southw	
020270067	34	MCDONOUGH, DIANE D			DRYDEN		13053	Dryden -	Southw	
020270586	84	KELEMEN, OERS			DRYDEN		13053	Dryden -	Southw	
020270068	57	YAEGER, CAROLYN A		7.	FREEVILLE		13068	Dryden -	Southw	
D20270075	60	EVERETT, ANNE M			FREEVILLE	NY	13068	Dryden -	Southw	
D20271013	48	ARNOLD, CAREN D	1000		DRVDEN	NY	13053	Dryden -		
D20270448	13	BRANTLEY, CYNTHIA A	20 9	Open		NY	13068	Dryden -	Southw	
020270839	22	SHIRK, BARBARA J	7 BI	Check Out		NY	13053	Dryden -	Southw	
D20270449	60	Perry, Misty	29.8	Place Hold		NY	13053	Dryden -	Southw	k
one			Status Print		recorc					
			ti	Add to Record S	Set 🔸	N	lew			
				Add to Mailing		E	xisting			

<u>Step Four:</u> After creating a **Title** and **Note**, after saving your new **Record Set**, make a note of the **Record Set number** located in the header. (If you lose this number, you can always search for it under **Patron Services** \rightarrow **Record Sets** \rightarrow **Search by title**.) You will need it to use **Mail Merge**.

Name:	DRY-Head Of	Household	Owner: aheilig			▼ Recor	rd type: Patron	
Note:	created using	PSTAT3 field/head				Numb	Number of records: 74	
					Q	w 🔤	i 🖻 🖨	
Barcode		Name	Street	City	State	Postal	Library	
D202700	0097	SANTIAGO, JENNIFER	23	DRYDEN	NY	13053	Dryden - South	
D202700	0110	BULLOCK, VALERIE H		DRYDEN	NY	13053	Dryden - South	
D202700	0241	LEVAN, LINDA J		FREEVILLE	NY	13068	Dryden - South	
D202700	0429	PROULX, MARGARET	E	ETNA	NY	13062	Dryden - South	
D202700		CANFIELD, DONNA G		RICHFORD	NY	13835	Dryden - South	
D202700		YEAGER, AMY E		FREEVILLE	NY	13068	Dryden - South	
D202700		MCGORY, BETTY J		FREEVILLE	NY	13068	Dryden - South	
D202700		REED, JACK T		DRYDEN	NY	13053	Dryden - South	
D202700		BUTTON, CHERYL D		DRYDEN	NY	13053	Dryden - South	
D202700		HARRIS, FRED		DRYDEN	NY	13053	Dryden - South	
D202700		GOODENOUGH, TRIC	IA R	DRYDEN	NY	13053	Dryden - South	
D202700		KIEFER, PATRICIA A		FREEVILLE	NY	13068	Dryden - South	
D202700		CHAMBERLAIN, JOYC	EE	DRYDEN	NY	13053	Dryden - South	
		GILBERT, MARY C		DRYDEN	NY	13053	Dryden - South	
D202700				DRYDEN	NY	13053	Dryden - South	
D202700 D202700	2081	WAKEMAN, CATHERI	NE 5	DRIDEN	IN I	13033	Di yuchi - Souu	

<u>Step Five</u>: Create an Excel file containing your new **Patron Record Set**.

In the Polaris Toolbar, click on:

Utilities → Reports and Notices (New window will open) Custom → Public Services → Patron Services → Patron Mailing List By Patron Record Set

Polaris ILS 4.1.760 - aheilig [FLLS]				
File Acquisitions Serials Catalog	ging Patron Services Circulation Administration	Utilities Window H	elp	
	i in	Reports and Notic	ces	
		Importing		•
🖷 Polaris Reports				
		Quick-circ hern Re	on da	
Report Categories:	Available Reports:			
Polaris Acquisitions ⊡ Cataloging	Name AA-Patron List by Patron Code and Stat Class AA-Patron List for Off-Line Circ by Barcode		Type Report Report	Date Modified 10/10/2012 9:41 AM 10/10/2012 9:41 AM
Circulation	AA-Patron Mailing List		Report Report	10/10/2012 9:42 AM 10/10/2012 9:41 AM
Circulation Deposit Collections	AA-Patron Stat Class Count by Patron Code AA-Patron Statistical Class Count by Library AA-Patrons Without A Password		Report Report Report	10/10/2012 9:42 AM 10/10/2012 9:42 AM 10/10/2012 9:42 AM
PAC Public Services Patron Financial Patron Services Patron Services	AA-Patrons without Stat Class by Library		Report	10/10/2012 9:42 AM
PAC				

Make sure that you select Excel as your **Output Type** by clicking the printer icon in the top right corner and selecting Excel.

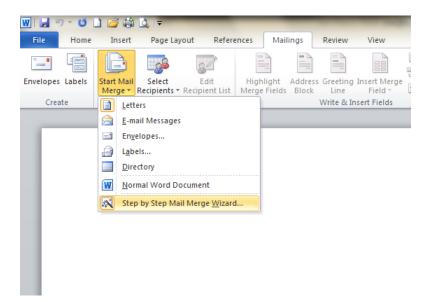
Polaris Reports					<u> </u>
				<u> </u>	
Polaris Cataloging Crculation Custom Custom Custom Custon Difference Circulation Difference Circulation Difference Pace Pace Pace	Available Reports: Name AA-Patron List by Patron Code and Stat Class AA-Patron List for Off-Line Cric by Barcode AA-Patron Mailing List AA-Patron Mailing List by Record Set AA-Patron Stat Class Count by Patron Code AA-Patron Statistical Class Count by Library AA-Patron Statistical Class Count by Library AA-Patrons Without A Password AA-Patrons without Stat Class by Library	Type Report Report Report Report Report Report	Date Modified 10/10/2012 9:41 AM 10/10/2012 9:41 AM 10/10/2012 9:42 AM		Adobe PE HTML 4.0 MHTML Excel CSV Word

Step Six: Use the Patron Record Number to generate the Excel file and then save to an appropriate file.

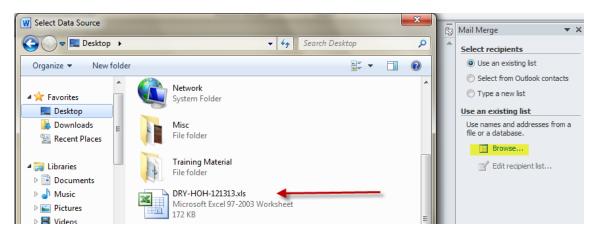
You are now ready to use Microsoft Word 2010 to use the Mail Merge feature to create labels, envelopes, etc.

Microsoft Word 2010 Mail Merge

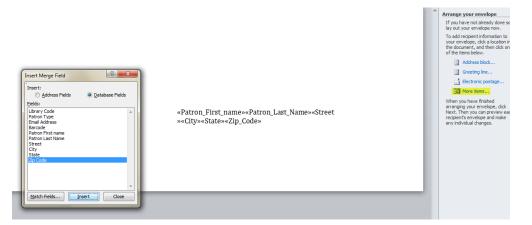
<u>Step One</u>: After opening your Word document, select the **Mailings** tab at the top. Click on the **Start Mail Merge** icon then select the **Step by Step Mail Merge Wizard**.



<u>Step Two</u>: On the right hand side, select which item you would like to use, and follow the template to select the size of the item you are wishing to create. When prompted to select recipients, **Use an existing list**, and **Browse** to find your **Excel Patron Record Set**.

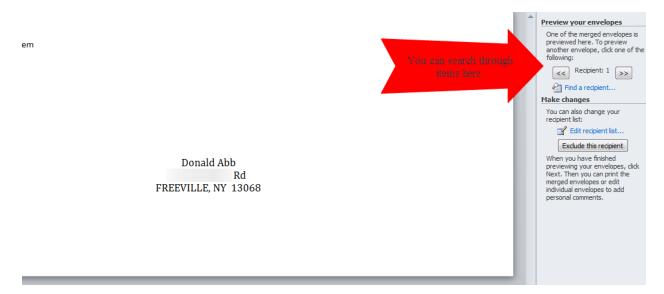


<u>Step Three</u>: Move on to step four of six of the template to arrange your envelope. Click on the text box where you would like to add the Patron Record Set information, and select more items under the Arrange header.



Note: You can edit the placement of the data so it resembles the format that you need.

<u>Step Four</u>: By going to the next step of the template, you will be able to see if the data transferred correctly.



Step Five: If satisfied with the results, follow the prompts to print.

Notes:

- Use this technique to target groups for reading groups, programs, and other events that does not require a full mailing to your district
- Save lists to contact lists easier to access