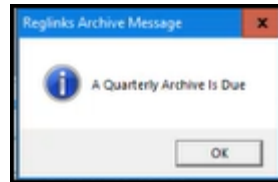


Quarterly Archives Flash Card

When a Quarterly Archive is due, when you access **Registration Links**, the 'A Quarterly Archive is Due' message displays:



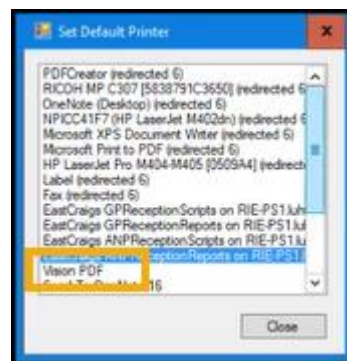
Before you run your Quarterly Archive

If you are ready to run your archive, with **Registration Links** closed, you must first:

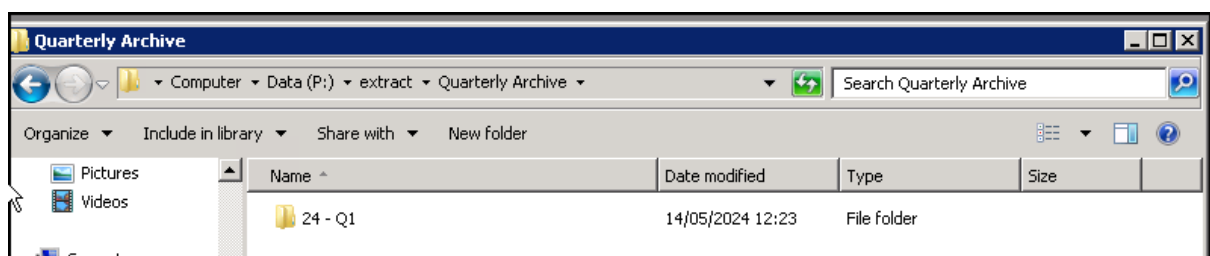
- **Set your Default Printer to Vision PDF** - From your Desktop, double click **Default**



Printer and from the **Set Default Printer** screen, select **Vision PDF** from the available list:



- **(Initial run only) Create a Quarterly Archive folder** - The next time you run the Quarterly Archive, from **File Explorer**, navigate to **p:\extract**. Right click within the white space and select **New - Folder**. Name the folder 'Quarterly Archive'.
- **Before each Quarterly Archive is run** - From **File Explorer**, navigate to and open **p:\extract\Quarterly Archive**. Right click within the white space and select **New - Folder**. Name the folder 'yy - QN' where 'yy' is the year and 'n' is the quarter you are about to run, for example, '24 - Q1' for the first quarter of 2024:

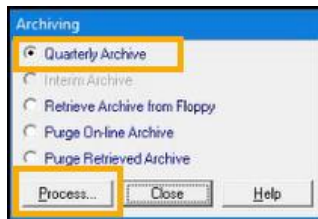


Running your Quarterly Archive

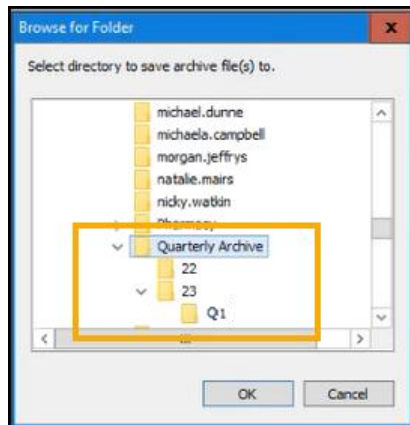
To run your quarterly archive:

i Important - Ensure you complete the **Before you run your Quarterly Archive** on page 1 before you start this process.

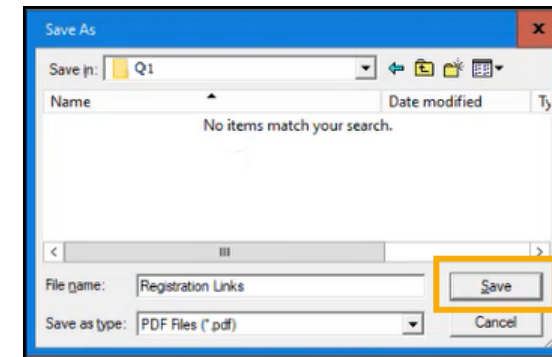
1. From the **Vision 3** front screen, select **Messaging - Registration Links**.
2. The 'A Quarterly Archive is Due' message displays, select **OK**.
3. Select **Actions - Archive - Quarterly Archive** and then **Process**:



4. The **Browse for Folder** screen displays, navigate to the **p:\extract\Quarterly Archive\YY - Qn** folder you created before starting the archive:



5. Select **OK** and the archive starts an **Archive** progress bar displays.
6. The **Save As** screen displays, ensure you have the correct desination selected in **Save in, p:\extract\Quarterly Archive\YY - Qn** and select **Save**:



7. You may be prompted to rename and save each certificate, simply adding a 1, 2 and then 3 after Registration Links works very well.
8. The Archive process now completes saving your certificates as PDFs.
9. From **File Explorer**, you can now navigate to your **p:\extract\Quarterly Archive\YY - Qn** folder, select, open and print your Quarterly Archive Certificates.