SeniorSystems
Advantage

Admissions
Release Bulletin
August 2012

In this bulletin...

About Release 92_3 Admissions Features

Release 92_3 introduces a major new feature set to Advantage Admissions--Archive & Publish Decision Letters--providing significantly expanded functionality around the decision letters work flow and delivery options, including the ability to approve and individually edit letters, and to attach letters to email or publish them via My BackPack. We are also introducing a brand new online Advantage Admissions User Guide, available via the Admissions Help menu. We've made several other changes and enhancements to Admissions and Enrollment Management. Please see the individual topics in this bulletin for further details.

Please contact Support@senior-systems.com if you have any questions about any of these new features.

Admissions/Enrollment Management Enhancements

New Decision Letter Workflow and Publishing

The new Archive and Publish Decision Letters features are optional, but schools that wish to implement or accommodate an approval workflow and/or publish decision letters electronically will need to enable and use the new options. See the following topics for further details:

Archive & Publish Decision Letters - Overview
Archive & Publish Decision Letters - Setup
Archive & Publish Decision Letters - Processing Steps

New Admissions Online User Guide

The Admissions User Guide has been updated and is now available from the Help menu in the Advantage application. This is an online help-style user guide, with a completely new design and organization. This is the first in a series of updates planned for the Advantage product line. Next time you have a question or need a refresher on a topic, try it out and see what you think!

Enrollment Management Enhancements

Additional Custom Merge Fields for Enrollment Contract Editor - Two new merge field dropdowns have been added to the Enrollment Contract Editor to allow for insertion of the any of the first 50 Registrar custom fields and any of the first 50 Accounts Receivable custom fields. (Previously, the Merge field dropdown allowed for any of the fist 10 Registrar custom fields, and these 10 fields remain in the Merge field dropdown as well, so that no existing contract templates will be affected.) These new fields allow schools greater flexibility in customizing enrollment contracts.
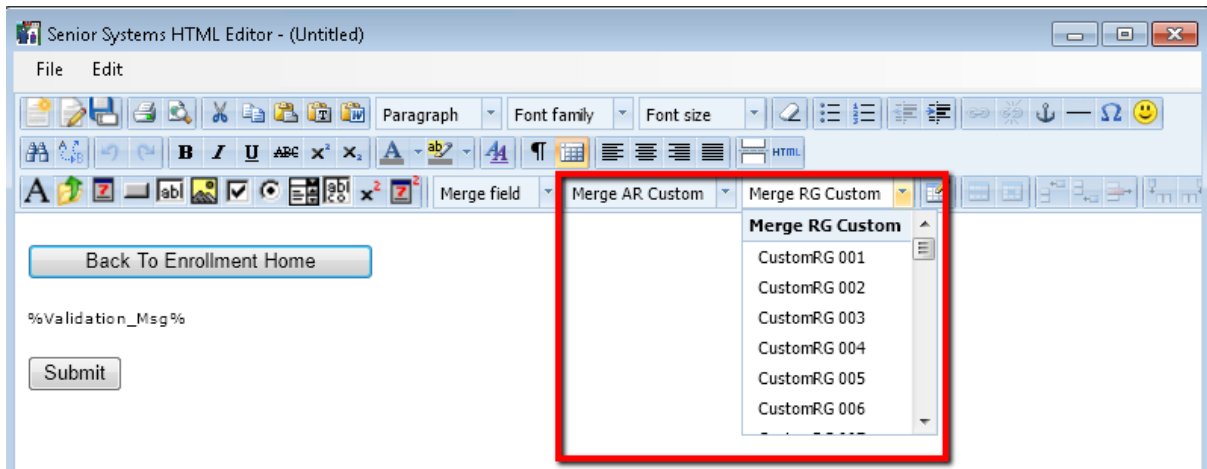
Withdrawal Notifications - Previously, if you withdrew a student from Next Year in Enrollment Management, and then changed the withdrawal to This Year (to correct a mistake, perhaps), Withdrawal Notifications would not be posted to reflect the change. Now, the system will always post the notifications for these cases.

Email Address Field in Student Maintenance - The Email address field for parents in the Enrollment Management version of Student Maintenance had a smaller field size, making it hard to view longer email addresses. The field size has been increased to match the other Advantage applications.

Old Selections Removed From Online Enrollment Setup Screen in My BackPack - The options relating to the now superseded method of creating and displaying enrollment contracts have been removed from the Online Enrollment Setup screen in the Admin Community of My Back-Pack since they are no longer used.

Fixed Blank Submission Problem for Additional Forms with Online Enrollment - In some cases, when a parent viewed, but did not submit, an additional form in Online Enrollment, a pending record was created for approval and it could not be approved or deleted. The system now only creates the pending record after the parent has submitted the form.

Archive & Publish Decision Letters - Overview

The Archive & Publish Decision Letters enhancement provides a whole new set of capabilities around the decision letter process in the Admissions application. Schools can utilize several new features to implement a process that meets their requirements and complements their office work-flow.

Previously, creating decision letters was similar to other types of letters in the system: you would build a merge data file for all applicants with a particular decision but without a letter print date, perform a mail merge in MS Word using the data file and your letter template to create and print the letters, and then have the system update the letter print date in the applicant records. There was no way to facilitate a review and customization process, or to see or otherwise publish/email a decision letter unless you had a manual procedure in place to do so. In addition, decision letters could only be created for parent P1 and P2 type addresses.

Now, with the Archive & Publish Decision Letters feature, the mail merge process is done auto-matically for you. You can then use the new Edit/Approve function to review, edit/customize, and approve the letters individually. Once approved, the letters can be published, which archives a PDF version to each applicant's Media tab. The letters can still be printed and mailed if desired, but they can also be attached to an email and/or published for secure online access for parents via My BackPack. In addition, in a related enhancement, decision letters can now optionally be created for students (applicants) and any 'Other' (Z type) addresses which are designated as 'Send Mail'.

VERY IMPORTANT:

FOR SELF-HOSTED SCHOOLS, Archive & Publish Decision Letters requires MS Word ver-sion 2007 or later, as well as .NET Framework 4 or higher: http://www.microsoft.com/net. These two components MUST be installed on any workstation that will be using this feature!

For Advantage Cloud (hosted) schools, these upgrades have been handled for you, includ-ing access to MS Word version 2010 which is now installed for your Advantage Cloud work environment (see the 923 Advantage Cloud Release Bulletin for details).

Archive & Publish Decision Letters - Setup

Before using these new features, you will need to perform some setup tasks to enable the new menu options, review/assign security keys, review and/or create new letter templates, set new defaults in Admissions Administration Maintenance, create review and approval status definitions for the approval workflow, and possibly create new email templates. Use this checklist to make sure you have all the pieces in place:

- **Enable New Process and Features** - This new set of features must be turned on using a new system preference in Admissions Administration Maintenance. You must log in <u>as the schema owner</u>, navigate to Maintenance > Administration Maintenance > Preferences and set the 'Use new Decision Letter Build/Archive process' preference value to 'Y'.
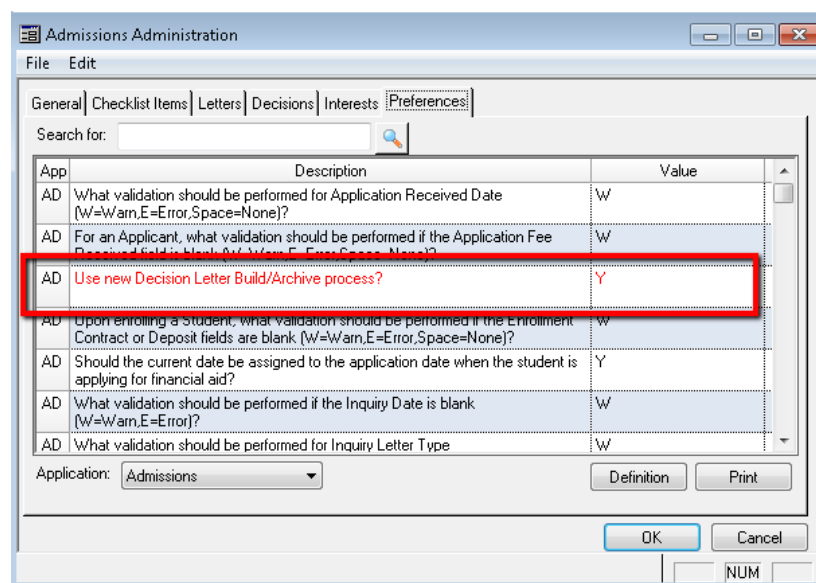
Once turned on, the Letters > Decision choice on the Admissions application main menu will change to 'Decision (with Archive & Publish)' and will have 3 sub-menu choices:

- Build - create decision letters with automatic mail merging
- Edit/Approve - review, edit/customize individual letters, and approve them for release and publishing
- Archive/Publish - finalize approved letters and store them on the Media tab for individual applicants; this function also makes letters available for email attachments and/or posting online for parent access

- **Assign Security Keys** - There are 3 new branches on the security key tree under the Letters > Decision Letters key, which correspond to the 3 new menu choices listed above, plus an additional sub-key for the Edit/Approve function, to control permission for letter

approval. During database update, none of these new keys are automatically assigned to any users or groups. In the System Administration application, you will need to assign the security keys to grant access to particular sub-functions for the appropriate users and/or groups.

> **Note:** You may also need to review/assign some new security keys or groups for My BackPack users to access email functions in the Admin Community if you have Admissions Office personnel who will be using broadcast email for the first time. See the My BackPack Admin Community online help or the My BackPack Administrator's Guide for details about security setup for My BackPack.

- **Review/Create Decision Letter Templates** - If you don't have existing MS Word documents set up as templates with merge fields, you will need to create those. Even if you do have existing templates (which you may continue to use), you may still need to set up new ones, especially if you plan to use the new options to create additional versions of the decision letters for students or Other (Z type) addresses (rather than just P1 and P2 parents). These templates will be used to automatically generate decision letters, so you will need to have a template for each combination of Decision Letter Type and Recipient Type (P1, P2, Student (Applicant), or Z address) for which you plan to create letters. The same template can be used for multiple combinations, if the text is appropriate. If you will be using any existing templates, these should be reviewed for completeness and accuracy.

> **Note:** It is generally a good idea to place your merge templates in a commonly accessible network location, so that all users who create decision letters will use the same templates.

To assist you in the process of creating templates when you don't yet have a merge data file to work with, there is an option to create a sample file that contains the applicable merge field headers. Just select **Letters > Decision (with Archive & Publish) > Build** and then click **CREATE SAMPLE MERGE HEADER FILE**. Name and save the file on your network (preferably in a location where all users can access it). Use this sample file as the data file to create decision letter templates in MS Word, so that you can access the appropriate merge fields.

> **VERY IMPORTANT:**
>
> **FOR SELF-HOSTED SCHOOLS,** Archive & Publish Decision Letters <u>requires that you use MS Word version 2007 or later</u>, as well as .NET Framework 4 or higher: http://www.microsoft.com/net. These two components MUST be installed on your workstation before using this feature!
>
> For Advantage Cloud (hosted) schools, these upgrades have been handled for you, including access to MS Word version 2010 which is now installed for your Advantage Cloud work environment (see the 923 Advantage Cloud Release Bulletin for details).

- **Set Up New Decision Letters/Defaults in Administration Maintenance** - To save time when generating decision letters, you can optionally specify a default merge template for each Decision Letter Type and Recipient Type combination in Admissions Administration Maintenance. These defaults can be changed at the time of actual letter creation, but setting up defaults helps to ensure consistency and accuracy for your output.

  There is a new Default Word Merge File (.docx) field on the Letters tab for decision letters (scroll to the right to see the Default Word Merge File field). The system will only build a data file if you request it, but you must designate a Merge File (.txt) even if you don't plan to use it.

  To create new letters or update decision letter defaults, select **Maintenance > Administration Maintenance** from the main menu in the Admissions application, then select the **Letters** tab and select 'Decision' from the Letter Type drop-down.

  To specify the default merge templates for existing letters, just scroll to the right to view the new Default Word Merge File (.docx) column. Click in each row as appropriate, click the ⌨ button to navigate to the template file, and then click **OPEN**.
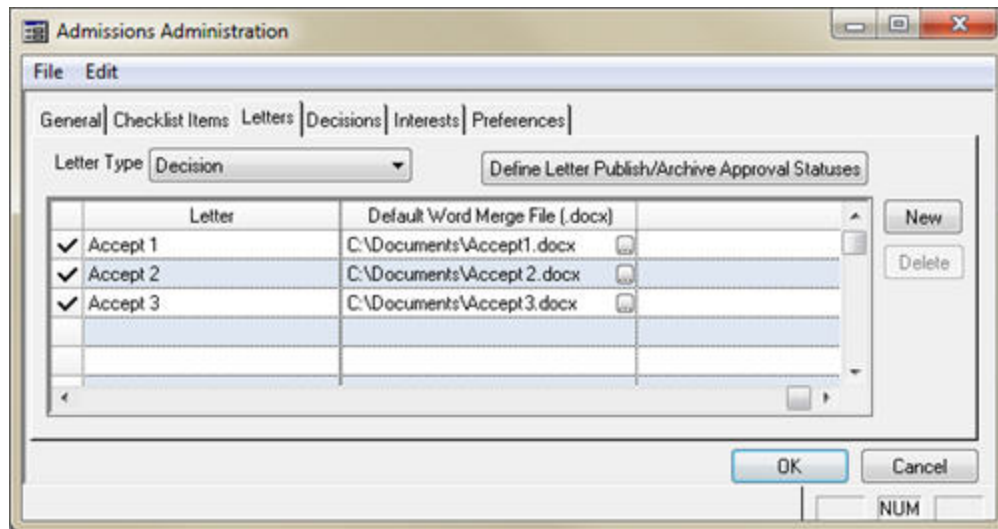
If you need to add any new letters, click **NEW**, and enter or select the data for each field on the new line. Note that the Address To field now includes choices for 'Students' and 'Other' (Z type) addresses (will only include those that are designated as 'Send Mail').

When all letters are set up as desired, click **OK** to close and save changes.

- **Create Status Definitions** - For the review and approval features, you will need to set up the values that will be available to users as they review, customize, and approve decision letters. On the **Letters tab** in **Administration Maintenance**, when you select the 'Decision' letter type from the drop-down, there is a new button to access and maintain the list of approval status values.
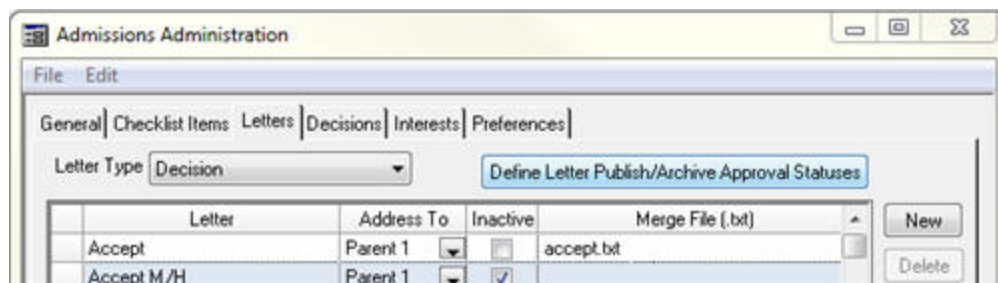

There is one Status value of 'Pending' that is system-defined and cannot be changed or removed. You can define as many other status codes or intermediate levels as you require for your school's workflow.
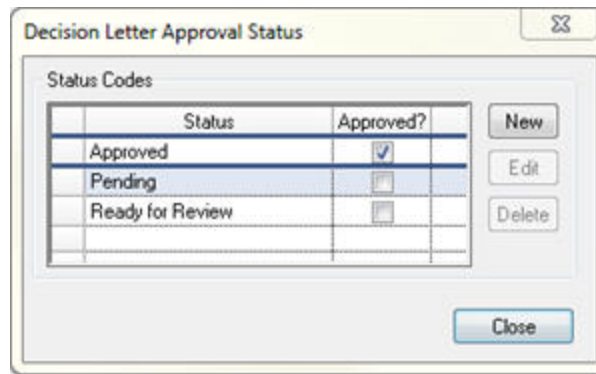
You must define at least one Status value that represents approval. You may also choose to have more than one type or level of approval, so there can be multiple Status values that represent approval. This is set via checkbox when creating or editing the Status value:
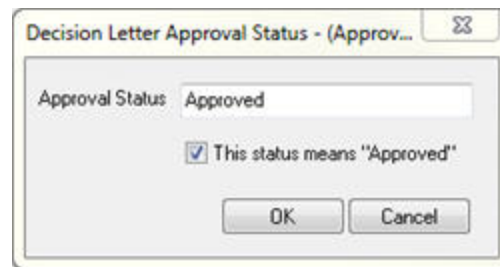
- **Create Email Templates** - If you plan to attach decision letters to an email and/or publish them for parents to access online, you will want to create one or more email templates. This task is performed in My BackPack using **Email > Template Maintenance in the Admin Community (select the Admissions tab)**. There are two new merge fields available for admissions email templates; these are only for use if you plan to have parents log in to view an electronic version of the decision letter. (If you plan to only attach decision letters to emails, you will NOT need to use these merge fields.)

    - **Link To Decision Letter** - This merge field inserts a direct link to the decision letter online. It shows up in the recipient's email as 'Decision Letter for [Applicant Full Name]'. Upon receipt of the email, the recipient will click the link to go directly to an electronic (PDF) version of the letter, after logging in with his/her user name and password for security purposes. Although the My BackPack login screen is used, the recipient does not see any My BackPack pages or menus. The recipient must already be set up as a parent web user in order to access this link.

    - **Link To My Documents Page** - This merge field inserts a direct link to the recipient's My Documents page in My BackPack. It shows up in the recipient's email as 'My Documents Page Link'. Upon receipt of the email, the recipient will

click the link to go directly to his/her My Documents page in My BackPack, after logging in with his/her user name and password for security purposes. From there, he/she can navigate normally within My BackPack (users who are not current parents will only be able to access the Prospects Community menus). The recipient must already be set up as a parent web user in order to access this link.

Note: These links will only work for parent users who currently have a My BackPack parent web account. Other recipients, including students (applicants) or temporary online application accounts that have not been converted to parent web accounts will not have a valid user name and password to log in to view the letter. You will need to have previously set up the My BackPack parent user accounts before sending the emails. This can be done in the Admissions application in several ways, or you can use the Auto Assign function in System Administration. See the Academics-Admissions Release Bulletin 91_9 (December 2010) for more details about how to create parent web users for applicants, or see the My BackPack Administrator's Guide (or online help for the Admin Community) for more details about how to auto-assign parent web accounts to applicant parents.

Archive & Publish Decision Letters - Processing Steps

The exact sequence of steps from the entering of decisions to the final publishing of decision letters will vary somewhat from school to school. These steps provide a general sequence and highlight all available options for the process.

1. **Enter decisions for applicants as you have done previously.**

   You may notice that there is a new Letter Archive column on the Decision tab in Inquiry/Applicant Maintenance. After the decision letter has been created and approved and/or published, this column will contain a View link to the document(s).

2. **If necessary, set up parent web user accounts for anyone who will be accessing an electronic version of the decision letter via direct link or the My Documents page in My BackPack.**

   > **Note:** This step is NOT necessary if you only plan to email the decision letters as attachments.

   If you intend to provide direct links to an online version of the decision letter, or if you intend for parents to view the decision letters via the My Documents page in My BackPack, each of these recipients will need to have a pre-existing parent web account (online application accounts are NOT the same as parent web accounts, although they may be converted to parent web accounts as part of the approval process). Also, keep in mind that only parents (including 'Other' (Z type) addresses) can be provided with My BackPack accounts, as the system does not support accounts for students (applicants) until after enrollment. This step can be done at any time prior to sending the email links, but if it has not been done as part of the application processing, it is often easiest to do this prior to, or along with, the letter build process.

   You may have already set up parent web users as part of your standard admissions workflow, but if not, it can be done in the Admissions application in several ways, or you can use the Auto Assign function in System Administration. See the Academics-Admissions Release Bulletin 91_9 (December 2010) for more details about how to create parent web users for applicants, or see the My BackPack Administrator's Guide (or online help for the Admin Community) for more details about how to auto-assign parent web accounts to applicant parents.

3. **Build the decision letters.**

The build process for the letters is now more fully automated. The Build Decision Letters screen shows all combinations of Decision Letter Type and Recipient Type for which there are any letters to be built (i.e. the Sent Date for the letter is currently blank). From this screen, you will select the letter(s) you want to create, but instead of building a merge data file, the system will actually perform the mail merge to create the letters as individual MS Word documents. If you have not specified a default template for one or more letters on the build list (or if you wish to override the default with a new choice), you will need to specify the template to be used for the build process.

You will need to specify a Document Description at the time of building (used for archiving purposes and also as the file name for documents as email attachments), and you can also optionally choose to do any or all of the following:

- Create a merge data file (.txt format, for your own use in other tasks or types of letters)
- Print labels or envelopes
- Print the decision letters

Note: Until the letters have been approved (next step), you can rebuild and replace them if desired. Clicking the 'Show letters already built but not yet approved' checkbox includes rows on the screen for all letters that have been created but have not yet been approved.

Note: The Letter Print Date (Sent Date) is no longer updated at the time of build; depending on your workflow, it is updated either at the time of approval or at the time of archiving/publishing.

This screen also includes a handy List Applicants button that brings up a quick report, showing all applicants for whom letters will be created at this time, based on your selections from the screen for processing.

See How To Build Decision Letters for details about the initial build process.

4. **Review, edit/customize, and approve the decision letters.**

After decision letters have been built, the new Edit/Approve function makes it easy to review, customize, and approve each letter. If you do not need to review each individual letter, you can quickly approve them all as a group, but otherwise, you will review each applicant's letter(s) one at a time. If you wish to edit or customize the text in any way, you can do so and re-save, and the edited version of the letter replaces the prior version. Using this review screen, you can also change the Approval Status to signify approval of the letter, or to indicate any intermediate approval steps you may have set up for your school's workflow.

Once approved, the letters are temporarily saved as MS Word documents on the Media tab for each applicant, and they are also available for viewing (only) via a link on the Decision tab in Inquiry/Applicant Maintenance. Until they are published, the individual letters can still be edited using MS Word from the applicant Media tab.

You can optionally choose to update the Letter Print Date at the time of approval by checking the appropriate box at the bottom of the window; otherwise, the Letter Print Date will be updated automatically at the time of archiving and publishing (next step). Once the Sent Date is updated, letters cannot be rebuilt unless you manually edit the Decision tab in Inquiry/Applicant Maintenance to remove the Sent Date for the letter. (In this case, you will ALSO need to manually delete the document from the Media tab, since the first version is NOT automatically deleted when creating the new one.)

See How To Edit/Approve Decision Letters for details about the review, edit/customization, and approval process.

5. **Archive and publish the decision letters.**

The archive process converts the individual decision letters to PDF files and re-saves them on the Media tab, updates the Sent Date for the letter on the Decision tab (if it has not been updated already), and makes the PDF file available for viewing from the Decision tab. Publishing is an optional step, but is needed to make the letters available for online access OR for emailing as attachments. Archiving and publishing is accomplished via a wizard that walks you through the process of setting all appropriate values for the documents on the Media tab screens. For more general information about the new Media tab fields and functionality for Admissions, see the All Applications Release Bulletin 92_1.
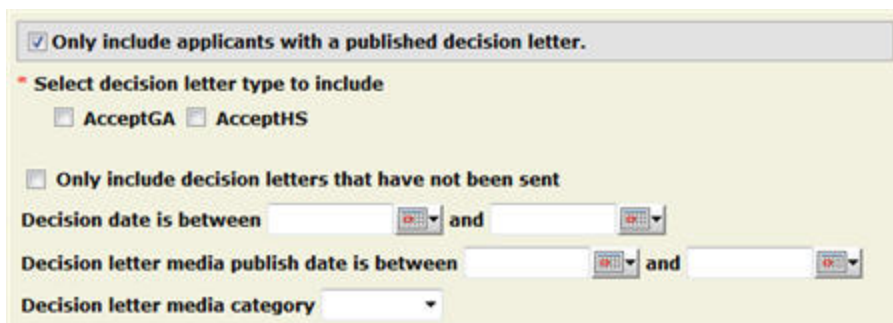
> **Note:** If you just wish to attach decision letters to emails, but do not want to provide direct online access via My BackPack, be sure to select a Publish Date in the distant future (e.g. 1/1/2020). This will make the document available for emailing, but existing My BackPack users will not see it on their My Documents Pages.

Alternately, you can set a specific future date/time that the letters will become viewable to parent users in My BackPack.

See How To Archive/Publish Decision Letters for details about the archive/publish process.
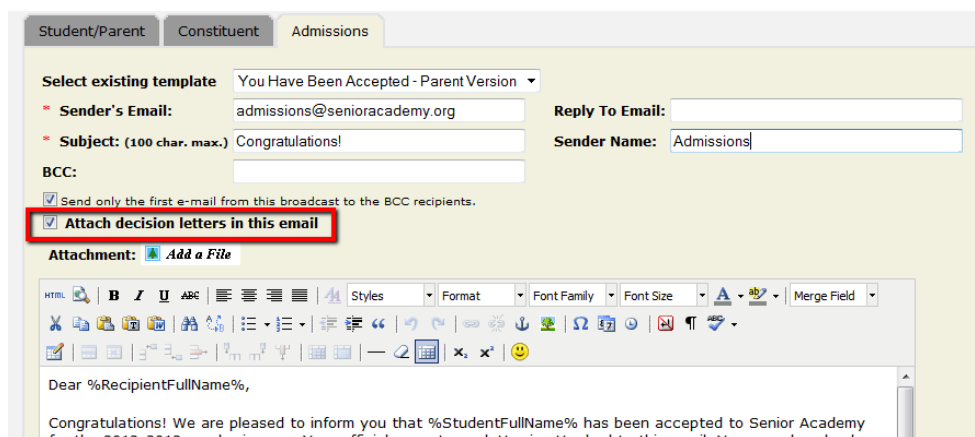
6. **If you want to email decision letters as attachments, or alert applicants that decision letters are available online, create and send the broadcast emails to letter recipients as needed.**

There is a new checkbox on the Basic recipient selection tab for Admissions emails that allows you to select 'Only include applicants with a published decision letter'. When you check this box, an additional set of criteria opens up so that you can specify which decision letter types to include (based on your prior selection(s) for decisions to include), whether or not to include only those recipients for whom an email has not yet been sent, and whether to filter for a range of decision dates, decision letter publish dates, and/or a specific media category.

Also, when you get to the email composition screen, there is a new checkbox to indicate that you want to attach decision letters to the email. You can also add other attachments and include any type of HTML content, as is the case for any broadcast email.

Remember that if you use a template or compose an email that uses either of the new merge fields to send a link to an online version of the letter or the My Documents page, these can only be accessed by parents who have a My BackPack web account. See step 2 above for more details about who will be able to view the online documents. Note that ANY recipient with an email address may receive the document as an email attachment and will not need a My BackPack parent account to view it.

See How To Send Decision Letters In Broadcast Email for details about using the broadcast email function with decision letters.

How To Build Decision Letters

1. Select **Letters > Decision (with Archive & Publish) > Build** from the main menu in the Admissions application, or click the ![Decision Letters] Decision Letters button in the shortcut bar and select **Build**.

2. The Decision Letter Build screen displays a list of all un-built decision letters, with one line for each unique combination of letter Type and Addressed To type. You can filter the list by division, and/or you can choose to include previously built but not yet approved letters.
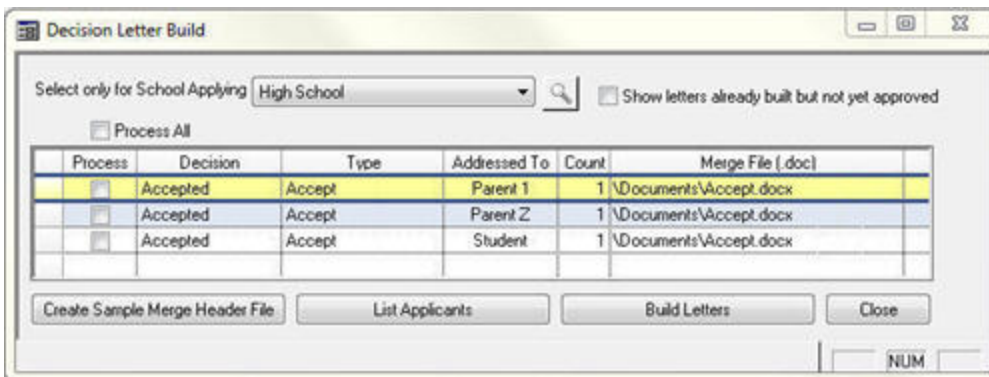
> **Note:** The Count indicates how many letters will be created for each type. Remember that a single decision for a single applicant can result in multiple letters being created.

3. Use the 'Process' checkbox to select the letters you would like to build at this time (or click to select the Process All checkbox). If you want to specify a different Merge File (or if there is no default value for the Merge File), click ⬚ in the Merge File column, navigate to the desired file, and click **OPEN**.

4. You can optionally click **LIST APPLICANTS** to view a report showing all applicants whose decision letters you have selected to process.

5. Once you have set the desired options, click **BUILD LETTERS** to continue.

6. Enter a document description. Keep in mind that this description will appear in several places, including the Media tab for the applicant, the Decision Letter Edit/Approval screen, and as the file name for an online document or email attachment, should you choose to publish. You can also select whether to print letters, print labels, and/or save a copy of the data file(s) associated with your decision letter build.

If you check the box to 'Save copy of data file (.txt)', the screen expands to show the data file(s) that will be created. You can edit the Merge File name if desired.
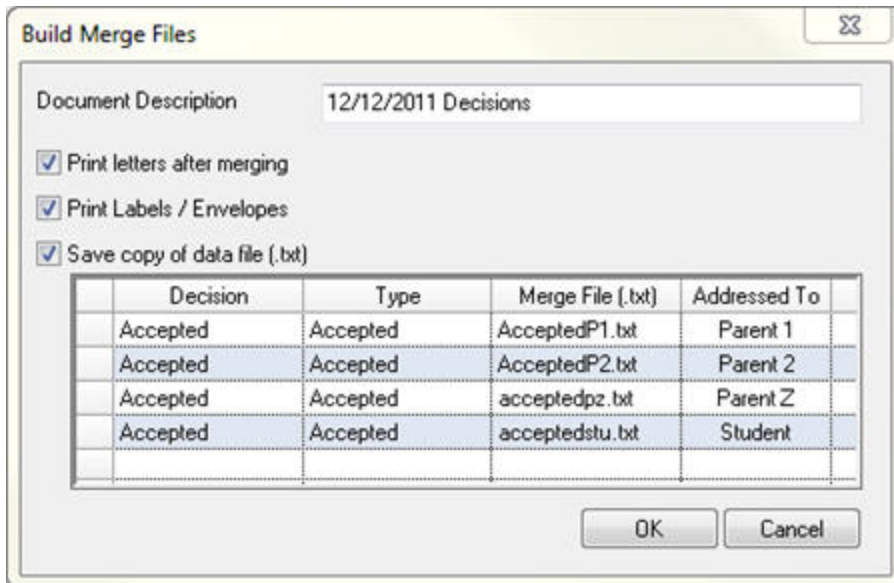

7. Click **OK** to build your letters. When the process is complete, a message is displayed with the number of letters created. Click **OK**. If there is a problem with the results, you can repeat the build process as many times as needed prior to letter approval (after selecting the 'Show letters already built but not yet approved' checkbox).

8. Once you have built your decision letters, see How To Edit/Approve Decision Letters to continue processing your decision letters.

How To Edit/Approve Decision Letters

After decision letters have been built, they can be reviewed and customized if desired, and then must be approved to make them available for archiving and publishing.

1. Select **Letters > Decision (with Archive & Publish) > Edit/Approve** from the main menu in the Admissions application, or click the [Decision Letters] Decision Letters button in the shortcut bar and select **Edit/Approve**.

2. The system displays a search screen listing applicants for whom decision letters have been built but not yet approved. If needed, you can use the filter options to locate the record(s) you want to work with.
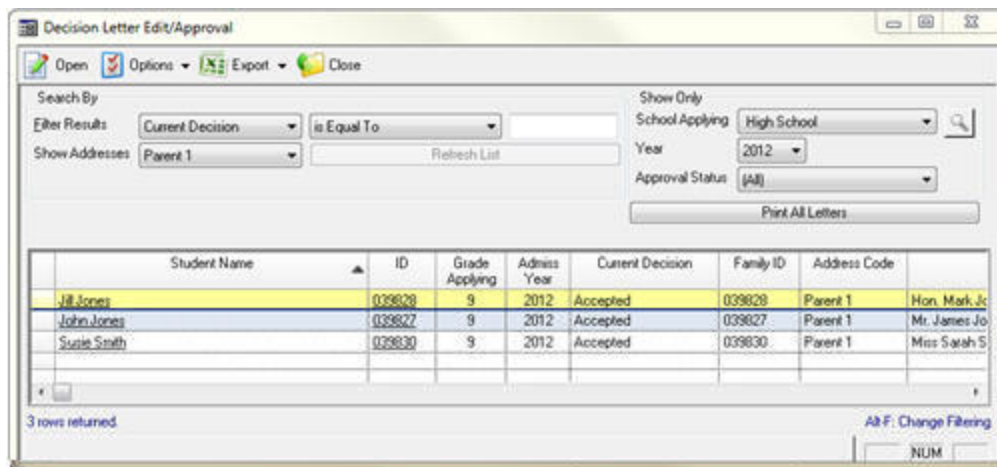
3. If you want to change the approval status for all of the letters on the screen at once, click **APPROVE ALL LETTERS**. Select the Approval Status value to apply, use the checkboxes if you want to print the letters and/or labels/envelopes, and indicate if you would like to update the Letter Print Date at this time (if you do not select this option, the system will automatically assign the Print Date later when letters are archived and published). Then click **OK**.
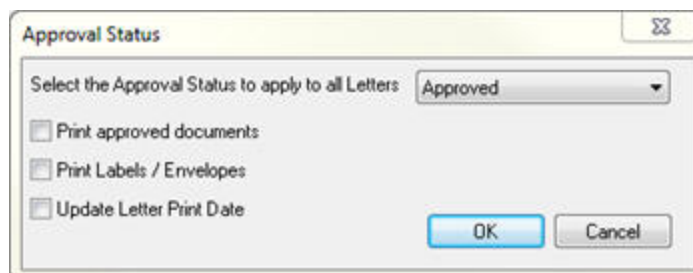
4. Click on an applicant's name to view a list of all un-approved decision letters in the system for the applicant.

> **Tip:** If you start with the first applicant on the list, you can use the 'Next' option to work through the list sequentially without having to return to the search screen.

5. For each applicant, you can view, customize, and/or print any of the decision letters, and/or you can change the Approval Status:

- **To preview a letter**, click the **VIEW** link for it in the Decision Letter column. The document opens in MS Word (view only). Close the preview window when you have finished viewing.

  > **Note:** This option is for viewing only! Even though it appears that you can edit in MS Word, you will not be able to save any changes that you make. Be sure to use the **EDIT** link to open a letter for customization.

- **To customize a letter**, click the **EDIT** link for it in the Decision Letter column. The document opens in MS Word. Make changes as desired and re-save the document using **File > Save** or the ⊟ Save icon in MS Word. (If you decide you want to return to the previously saved version, just click the **REVERT** link.)

  > **IMPORTANT:** DO NOT use Save As or attempt to save in a different location! If you do so, your changes will NOT be saved in the Admissions application.

- **To print a letter**, click the **PRINT** link for it in the Decision Letter column.

- **To change the Approval Status for an individual letter,** click in the Approval Status column for the letter and use the drop-down to select a new Status value.

- **To change the Approval Status for all letters in the list,** use the 'Set all Approval Statuses to' drop-down to select a Status value and click **APPLY**.

IMPORTANT: To save any changes you make in this window, including changes you make to letters in MS Word, you <u>MUST</u> click **OK** when you close the Edit/Approve window or proceed to the next record. If you do not click **OK** and instead click **CANCEL** or use 'X' to close the window, NONE of your changes to Approval Status and NONE of your letter customizations will be saved, even if you already saved them in MS Word.

6. If you want to work through the list without returning to the search screen (after clicking **OK** to save changes), click the 'Open Next Student' checkbox.

7. If you want the system to assign the current date as the Letter Print Date at this time, select the 'Update Letter Print Date' checkbox. If you do not select this option, the system will automatically assign the Print Date later, when letters are archived and published.

8. Click **OK** to save all changes OR click **CANCEL** to close without saving any changes.

9. Once you have completed the approval process, you are ready to archive and/or publish your letters. See How To Archive/Publish Decision Letters for details.

How To Send Decision Letters In Broadcast Email

You can provide decision letters via broadcast email in three different ways:

- as attachments to the individual emails
- by emailing direct links to online versions of the letters (users log in with user name and password for security)
- by emailing links to users' My Documents pages in My BackPack, where the letters are available

IMPORTANT: You can send decision letters as attachments to any P1, P2, Other (Z address), or Student (applicant) with an email address on record, but the email links to letters or My Documents pages will ONLY work if recipients have My BackPack user accounts. If you plan to use email links, see Archive & Publish Decision Letters - Processing Steps for more details about creating parent web accounts before sending decision letter emails.

1. In the Admin Community of My BackPack, select **CREATE BROADCAST EMAIL TASK** from the Email menu.

2. Select the **Admissions** tab and then the **Basic** sub-tab. Select one or more decisions to include from the first set of checkboxes, and then check the 'Only include applicants with a published decision letter' checkbox to see new options specific to decision letters. You must select at least one decision letter type to include, and you can optionally set other options to further limit the recipient list.

Continue to select other options on the screen as appropriate to filter/specify recipients and set other preferences, and enter a Mail History Description at the bottom. Then click **NEXT**.

3. Review recipients as you normally do. You can click the **VIEW DETAILS** link to see the full list and to remove recipients if necessary, then click **BACK** when you are finished. Then click **NEXT**.

4. On the email composition page, you can either select an existing email template or create a new broadcast email. Along with the usual information and merge fields, you can include links to your recipients' My Documents pages or directly to their decision letter via the 'Link to Decision Letter' and 'Link to My Documents Page' merge fields.
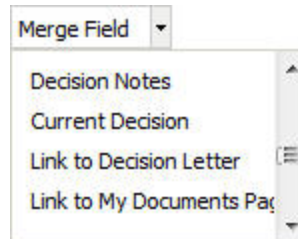
5. If you want to attach the letters as PDF files to the emails, click the 'Attach decision letters in this email' checkbox.

6. Once you have created your email, specified the desired options, and verified that everything is correct, you can click **SEND EMAILS IMMEDIATELY**, or click **NEXT** to schedule your broadcast email.

    Tip: You can use the Send Test Email option to double check your settings before sending or scheduling your broadcast email.

7. On the Schedule screen, specify the date and time you wish your broadcast email to be sent. You can optionally enter an email address to receive a job log from the system when the scheduled broadcast email task is complete. Click **FINISH** to schedule the broadcast email.

8. Double check your selections on the Confirmation screen. Note that you can check the status of your broadcast email task by selecting **VIEW SCHEDULED EMAIL TASKS** from the Email menu in the Admin Community of My BackPack.

How To Archive/Publish Decision Letters

After decision letters have been approved, they are eligible for archiving and publishing. Archiving saves the letters as PDF files to the applicant Media tab, and the optional publishing step makes the letters available for email attachments or for online access.

If the Letter Print Date has not been updated during the approval process, it is automatically updated at this time, and you can optionally print letters and labels or envelopes as well.

Note: If you plan to send decision letters as email attachments or post them online for direct access by parents, you must choose to publish them.

1. Select **Letters > Decision (with Archive & Publish) > Archive/Publish** from the main menu in the Admissions application, or click the [Decision Letters] Decision Letters button in the shortcut bar and select **Archive/Publish**.

2. The Decision Archive/Publish Options screen lists all decision letters that have completed the approval process. Select the item(s) you wish to archive and publish (or use the 'Archive/Publish All' checkbox to select all listed items) and click **Next** to continue.

3. Select the desired Archive options. These fields correspond with fields on the Inquiry/Applicant Media tab, and you can adjust these if needed to set the values correctly for this document. (See the All Applications Release Bulletin 92_1 for more details about the fields on the Inquiry/Applicant Media tab.) When all values are set to your satisfaction, click **NEXT** to continue.

4. Select the desired Publish options. If you do NOT want to publish to My BackPack, simply un-check 'Publish Document'. Otherwise, modify the Publish Beginning On date and time and/or select a Display Group Folder for display in My BackPack. Click **NEXT** to continue.

> **Tip:** If you want to send decision letters as attachments to email, but do NOT want to make them available for online access via My BackPack, set a publish date in the distant future (e.g. 1/1/2020).
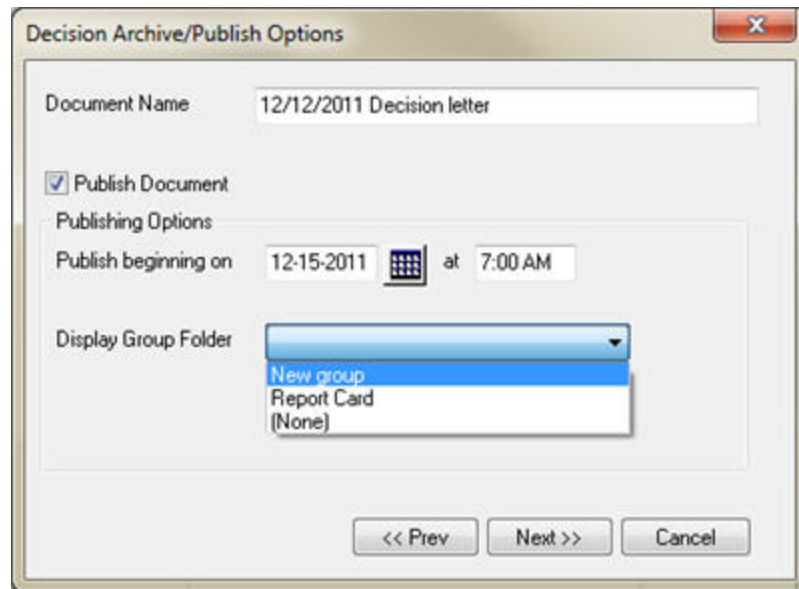
5. Check your settings, then click **FINISH** to complete the archive process. (Click **PREVIOUS** if you need to revise your selections.)
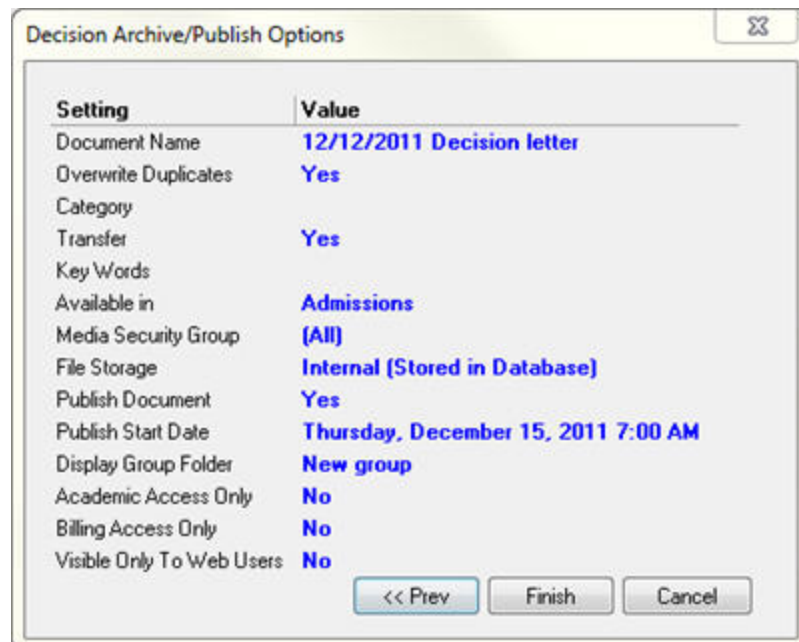
6. Once the files have been archived, the decision letter is available on the Media tab for each applicant, and, if you chose to publish to My BackPack, the published letter appears on the My Documents screen for the appropriate users, depending on the options you selected. You can make adjustments to document access for individual users from the Media tab in Inquiry/Applicant Maintenance. (See the All Applications Release Bulletin 92_1 for more details about controlling online document access using the Inquiry/Applicant Media tab.)