

VZ Annual Open System Prep Guide

(From Archive to Go-Live)

Quick Links

- **Schedule your Archive & Push-to-Production dates (required):**

<https://secure.visualzen.com/vzevents/vz/>

- **Reference: How to archive your system and push updates to production**

<https://www.govzo.com/en/vzo-knowledge-base/how-to-archive-your-system-and-push-updates-to-production>

1. Process Overview

1. **Archive:** Your current production system is archived to an offline URL.
2. **Clear & Refresh:** All students/events are cleared from production, and this cleared system refreshes your preproduction environment.
3. **Setup & Testing:** You configure and test your upcoming season in preproduction.
4. **Push to Production:** Preproduction is copied to the production URL. (This does not mean the system is live to students—only that it could be.)
5. **Go-Live:** Once students are imported and have access to the URL, they can begin using VZ.

Scheduling (Required)

- You **must schedule** both your Archive and Push-to-Production dates via the scheduling portal:

<https://secure.visualzen.com/vzevents/vz/>

- For additional **Archive and Push to Production** information, see the knowledgebase article above.

2. Guidelines

Important: Follow these to prevent early access or configuration issues.

Request timelines to plan around

- **Upgrades** — 16 weeks from full scope approval
- **Maintenance** — 4 weeks from full scope approval
- **If VZ staff assists with setup** — 4 weeks from full scope approval

Access control & communications

- **Delay student imports** until you are truly ready to go live.
- Use **Task List start dates** and **Communication Configuration start dates** to control early access.
- For **orientation reservations**, ensure start dates align with your intended open date.
- **Announce access** to VZ via email or external site only when ready.

3. Chronological Checklist

Immediately After Archive

- ☐ **Confirm** with IT and Payment Processor contacts if any updates to integrations are needed.
- ☐ **Notify IT** that production is offline and all student imports must be paused until production is back online.
- ☐ **Review/update** student data tables (majors, colleges, semesters, campuses, etc.).
- ☐ **Confirm** student data file/API feed format and notify VZ of changes at least 1 month before opening.

During Preproduction Setup - Content Updates

- ☐ **Emails** — update copy and test links. If you need new shells: send VZ a list of titles → VZ creates subject/body shells → you add content.
- ☐ **FAQs, Help Pages, Instructions** — update content and links based on testing review.

During Preproduction Setup - Event Setup

- ☐ **Create events** for orientation and additional sessions.
- ☐ **Ensure** at least one item is checked under every filtering option.
- ☐ **Enable guests**; set guest fees by type (use overall guest fee only for flat rates regardless of # of guests).
- ☐ **Add student fees** under the Student Type filter.

During Preproduction Setup - Test Students

- ☐ **Imported Students > New** — manually create records with codes replicating real student data. Do not test with live student records.
- ☐ **Or request VZ** to add a few test students for you.
- ☐ **Complete test reservations** for all variations to confirm filtering, fees, and event setup.

During Preproduction Setup - Communication Configurations

- ☐ **Review** last year's configurations: start/end dates (none earlier than open date), filtering, type/frequency.
- ☐ **Event-filtered communications** can only be updated after events are built.
- ☐ **Delete** any configurations you no longer need.
- ☐ **Run** the canned report showing all configurations with details.

During Preproduction Setup - System Review

- ☐ **Check** all reservation pages (Personal Info, Questionnaire, Dates, Guests, etc.).
- ☐ **Test** all custom programming.

During Preproduction Setup - Module Review

- ☐ **Task List** — review each item's start/end dates, content, filtering; ensure correct assignment for each list and prevent overlap (1-1 relationship).
- ☐ **Event Grouping** — update event group leaders in Users; leaders can be assigned after events are built; complete before the first event where used.

☐ **Review/update:** Housing, Course Preference/Ranking, E-confirmation Packet (send updates to VZ), Online Orientation, Merchandise, Event/Groups/Advising, Reservation Downloader.

During Preproduction Setup - Reports

☐ **Review and update reports;** submit change requests to VZ.

Before Go-Live

☐ **Test** all updates in production with test students to confirm accuracy.

☐ **Ensure** all start dates align with the planned opening date.

☐ **Import** students only when ready.

☐ **Notify IT** to begin the import process again when ready to go live.

4. Request Timelines

Maintenance Requests — 4 weeks from scope approval

Upgrade Requests — 16 weeks from scope approval

If VZ assists with client-responsible tasks — 4 weeks from scope approval