

VZ Annual Open System Prep Guide (From Archive to Go-Live)

Use this article each year when preparing to open your VZ system for a new season. It explains the archive and push-to-production process, required scheduling, and provides a chronological checklist to guide your setup through 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** – Students, reservations, and events are cleared; production is refreshed into preproduction.
3. **Setup & Testing** – Configure and test the upcoming season in preproduction.
4. **Push to Production** – Preproduction is copied to production (system is ready, but not yet live to students).
5. **Go-Live** – Once students are imported and the URL is open, students 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/>
- Avoid scheduling on Mondays or Fridays, as these are peak support and development days.
- Schedule your push-to-production approximately one week before go-live to allow time for testing in production.
- If desired, you can request VZ to lock student access before a specific go-live date/time (submit via support request).

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 ready to go live.
- Coordinate with your IT team to pause automated imports during archive and resume only once ready.
- Use Task List and Communication Configuration start dates to prevent early access.
- Align orientation reservation start dates with your intended open date/time.
- Announce access only when the system is ready and tested.
- If using VZ's lockout feature, submit a support ticket during preproduction setup to configure an unlock date/time for launch.

3. Chronological Checklist

Immediately After Archive

- ☐ **Confirm** with IT and Payment Processor if integration updates are needed.
- ☐ **Notify** IT that imports must pause until production is back online.
- ☐ **Review** and update student data tables (majors, colleges, campuses, etc.).
- ☐ **Confirm** with your data team if any code changes are planned for majors, colleges, or student types.
- ☐ **Notify** VZ of changes to data codes or file structure at least 1 month before opening.
- ☐ **Verify** archive access for all staff. If new users need archive access, an existing admin can add them as a user to that archive.

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.
- **Confirm** admin visibility and permissions for managing Optional Events.
- **Set** event capacity and filter capacities (if applicable).

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.
- **After pushing to production**, re-import one test student and confirm that the system behaves as expected.

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.
- **Confirm** start dates align with your go-live date/time.

During Preproduction Setup - System Review

- **Check** all reservation pages (Personal Info, Questionnaire, Dates, Guests, etc.).
- **Test** all custom programming.
- **Confirm** that all dashboards and widgets load correctly.

During Preproduction Setup - Module Review

- **Task List** — review each item's start/end dates, content, filtering; ensure correct assignment 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/time.

□ **Import** students only when ready.

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

□ **If using a VZ lockout**, confirm the unlock time/date matches your official launch.

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