Course Archive & Purge

<table>
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<th>Guidelines</th>
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**Purpose**

This operational guideline defines how long a course site will be retained in the Blackboard Learning Management system (LMS) before it is archived and removed from the active Blackboard LMS, and how long archives will be stored before they are permanently deleted (purged).

**Guiding Principles**

- To comply with federal or state laws and university policies related to course material retention.
- To retain centrally stored online course materials for a period of time that is adequate and useful.
- To ensure that online storage space is used efficiently and to minimize the financial impact of constantly increasing disk storage.
- To allow faculty/staff opportunity to review courses and request exemptions as necessary prior to archiving.

**Key Terms:**

- **Archiving**: The process of backing up a Blackboard course site, and saving all the course content and user interactions in a Blackboard-proprietary compressed (.zip) file (*Blackboard course archive file*). The course site is then removed from the Blackboard LMS.

- **Purging**: The process of permanently deleting existing Blackboard course archive files. The purge process can be based on the age of the data or the type of data.

- **Restoring**: The process of recovering the course contents and user interactions from an existing Blackboard course archive file. The course archive files may originate from secondary (divisional) storage or the central Blackboard archive storage.

**End of Term:** (for simplicity)

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<thead>
<tr>
<th>Term</th>
<th>Ends</th>
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<tbody>
<tr>
<td>Intersession</td>
<td>Jan 31</td>
</tr>
<tr>
<td>Spring</td>
<td>May 31</td>
</tr>
<tr>
<td>Summer</td>
<td>Aug 30</td>
</tr>
<tr>
<td>Fall</td>
<td>Dec 31</td>
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**Scope**


This operational guideline covers courses and materials stored in Blackboard course sites provisioned manually or automatically from SIS. Manually created template course sites and organization sites will be archived/purged on request by the site instructor/leader. Archive materials are not intended for distribution to students; archive materials are intended to serve as a non-official reference copy of materials available to instructors and other university staff with a need to access the contents.

Affected Data

Course Content and Materials: Includes structure, links or files uploaded in Course Files or posted in Content as well as local features of a Blackboard course site such as Discussion Forums, Assignments, Assessments, Grade Center columns, etc.

Student Interactions/Data: Includes Grades, Assessment attempts, Assignment submissions, Discussion posts, etc.

Outside of Scope

External Content/Interactions: While the course archive would retain a link to external content, the archive would not capture content hosted or interactions that take place outside of the Blackboard course, e.g., Panopto videos, Voicethreads, Piazza discussions, and so on.

Student Portfolios: The portfolio exists outside the course-context, so would not be captured typically by an archive.

Organizations: Will not be included in the course archive process.

Timeline for Data Archiving and Purging

Course archiving will take place (at least) once a year. Course sites and materials will be archived 4 years after the end of the term the course was executed in. The course archives will be removed from the Blackboard LMS and moved to an archive storage location. The course archives will be purged after 1 year.

An example, a course run in Fall 2013 will be archived no earlier than Spring 2018 (term after Fall 2017) and subsequently purged no earlier than Spring 2019; a course executed in Spring 2014 will be archived no earlier than Summer 2018 (term after Spring 2018) and subsequently purged in Summer 2019.

- Each cycle will start with purging
- Earliest archive period will be Summer 2018
- The first archiving may include several years-worth of courses

<table>
<thead>
<tr>
<th>Course Execution Term</th>
<th>Course Archived (+ 4 years)</th>
<th>Course Archive purged (+1 year)</th>
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</thead>
<tbody>
<tr>
<td>Spring 2013</td>
<td>Summer 2017</td>
<td>Summer 2018</td>
</tr>
<tr>
<td>Summer 2013</td>
<td>Fall 2017</td>
<td>Fall 2018</td>
</tr>
<tr>
<td>Fall 2013 (or earlier)</td>
<td>Spring 2018</td>
<td>Spring 2019</td>
</tr>
<tr>
<td>Spring 2014</td>
<td>Summer 2018</td>
<td>Summer 2019</td>
</tr>
<tr>
<td>Summer 2014</td>
<td>Fall 2018</td>
<td>Fall 2019</td>
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Process & Procedures
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1) Purge course archives > 1 yr (retention period of archive)

2) Determine and mark courses eligible for archival as part of the next Archive Review period.

3) Open faculty/staff Archive Review period with accompanying notifications to leadership, faculty and staff as necessary.

4) Allow faculty to exclude course(s) from archiving:
   - Present a list of courses eligible to be archived
   - Provide a mechanism to exclude course(s) from the current archive run
   - During the next archive run the excluded course(s) will become eligible for archiving again

5) Execute archives:
   - Take into account course(s) to be excluded from archiving
   - Archives will be generated and stored in an archive location for one year
   - Schools will have (readonly) access to their archived course files
     - Access to be determined by domain admin roles or other school-groupings
     - Schools will have the ability to copy their archived course files to their own secondary storage location
   - Courses that were archived will be removed from the Blackboard LMS

6) Restoring archives:
   - There will be a mechanism to allow faculty and school staff to request restores from the course archive.
   - Blackboard support team will (typically) review requests for restoration and process the restore within one working day
   - The course will be restored for a temporary period of time onto the Blackboard LMS
   - After the temporary period of time, the course will be removed from the Blackboard LMS

How To's

The following page gives step by step instructions on how to navigate the Course Archive & Purge feature for Instructors and Domain Administrators.

- How to Access the "Course Archive" Tab
- Archive Review
  - How to View Courses Eligible for Archiving
  - Navigating the Page
    - How to Filter Results
    - How to Sort Results
    - Paging
  - Completing an Archive Review
    - When to Review Courses Eligible for Archiving
    - How to Archive a Course
    - How to Defer a Course from being Archived
- Restore Courses
  - How to Request a Course Restore
    - Viewing Courses Eligible for Restore
    - Requesting a Restore
  - Navigating the Restore Page

How to Access the "Course Archive" Tab

Login to Blackboard and go to the "Faculty/Staff" tab:
Click "Course Archive":

Make sure to agree to READ (so you know what you're agreeing to) and agree to the archive terms, check the box, and click submit:

By clicking submit, you will be directed to the "Archive Review" tab, and see the list of courses eligible to be archived.

Archive Review

How to View Courses Eligible for Archiving

Click the "Archive Review" button to display a list of courses eligible to be archived.
Navigating the Page

How to Filter Results

- **Contains** should yield courses containing only what is typed... i.e. AS, EN, 101
- **Equal to** should yield the exact value
- **Start with** should yield all courses that match the value that was typed in
- **Not Blank** should yield all courses
Example: The following results are filtered by using "Course Name", "Contains", and "General Biology I". Notice how the results include "General Biology II" as it contains "General Biology I" in the title.

How to Sort Results

Clicking on the column headers (Course ID, Course Name, Term, Archive Deferred) will sort the results by that field. The column headers circled below can all be sorted by clicking on their names.

Paging

Page direction can be found at both the top and bottom of the pages.

Clicking "Show All", in this case, would allow the user to see all 65 items.

The double arrow takes you to the first or last page (respectively), the single arrow takes you to the previous or next page (respectively).
Completing an Archive Review

When to Review Courses Eligible for Archiving

Archive Reviews can only be completed during the given archive review period. This archive review period will be noted at the top of the Archive Review page.

You are not able to take action unless the review period is open.

How to Archive a Course

Don't do anything! If you're okay with all of courses being archived, there is nothing left to do. These courses will automatically be archived.

How to Defer a Course from being Archived

First, use the check box to mark which course(s) you'd like to defer from this archive period.

Next click the "Defer Archive" button at either the top or bottom of the list.

You'll see a confirmation message that your course(s) will not be archived after this review period, as well as a green check mark in the row of the deferred course:
A reminder that archived courses may be restored for a limited amount of time during the one year period that the courses are archived. Courses that have been purged may NOT be restored.

How to Request a Course Restore

Viewing Courses Eligible for Restore

Click the "Restore Courses" tab, and you'll have access to all of your courses that have previously been archived.

Requesting a Restore

Here are the steps to request a restore. Without performing ALL of the following, your request will not be processed:

1. Select the corresponding radio button to the course you'd like to request to restore.
2. Select how many days you'd like that course restored for. The options are 15, 30, or 45 days.
3. Give a reason why you need this course restored.
4. Click the "Request Restore" button, located either at the top and bottom of the page.
Note: we expect restore requests to be typically processed within one working day.

Navigating the Restore Page

Go to the “Restore Courses” page.

Filter by the course status by moving the statuses (Archived, Purged, Restore Requested, Restored) between “Statuses to Exclude” to “Statuses to Include”.

Then click on “Go” to register filters.

FAQs

Send questions to blackboard@jhu.edu with “Course Archive” included in the email title.