Course Archive & Purge Operational Guideline

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)

<table>
<thead>
<tr>
<th>Term</th>
<th>Ends</th>
</tr>
</thead>
<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>
</tr>
</tbody>
</table>

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>
</tr>
</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>
</tr>
</tbody>
</table>

Process & Procedures

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