Course Archive & Purge

Guidelines

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>
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<td>Fall</td>
<td>Dec 31</td>
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</tbody>
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Scope
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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
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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.
Click the “Archive Review” button to display a list of courses eligible to be archived.

Navigating the Page

How to Filter Results
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:

**Archive Review**

*Please review carefully the list of courses to be archived. You should only select a course from being archived if you truly need it. Courses that are archived will be removed from Blackboard when the archive review period ends.*

**Restore Courses**

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.

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”:

Note: we expect restore requests to be typically processed within one working day.
Then click on “Go” to register filters.

FAQs

I don’t use Blackboard, why am I getting this email?

The notification(s) you received are based on historical data. At one point, you were listed as instructor for a course in Blackboard for the courses we are archiving. You might not have actually used Blackboard during that time.

If you want to check what course(s), see below (How do I see my list of courses).

If you no longer care about those courses, there's nothing more you actually need to do.

Why didn’t I get the email at the start of the review period?

We had a pilot phase in July where the Schools could get a look at the interface and provide feedback. The pilot phase would end at the time we sent out the first notification to the instructors (August 17th). In hindsight, we could have closed the pilot phase, and opened an actual review period starting August 17th. We extended the review period through September to give additional time for faculty/staff.

How do I see my list of courses?

You should be able to see your own list once you go through the Course Archive tab.

How To Steps at http://help.sset.jhu.edu/x/CgBqAw

What does archive mean?

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.

Course Archive and Purge Operational Guidelines page (http://help.sset.jhu.edu/x/DABqAw) > Scope section has more detail about what materials are or are not included in the archive.

I don’t have time for this, who can assist?

We would encourage you to work with your School's faculty support.

Can I archive my courses myself? Can I download my content?
There are a few options available to instructors:

1) Archive or Export (Recommended)

The **archive** course feature creates a frozen snapshot or permanent record of your course. An archive includes all the content, course statistics, users, and course interactions, such as blog posts, discussions, and grades.

The **export** course feature creates a ZIP file of your course content that you can import to create a new course. Unlike the archive course feature, the export course feature doesn't include any users or user interactions with the course.

Note: The Archive is a Blackboard-proprietary compressed (.zip) file, and would only be useful if restored/imported into another Blackboard LMS (of similar or later version).

How-to link: https://help.blackboard.com/Learn/Instructor/Course_Content/Reuse_Content/Export_and_Archive_Courses

2) Common cartridge format

Common cartridge is an initiative led by the IMS Global Learning Consortium. The initiative supports course packages you can use across learning management systems (LMS) such as Blackboard Learn.

To enable reuse in a broad number of LMSs, the package is limited to widely available features. Types of content not supported by common cartridge won't be included when a course is exported and imported in common cartridge format.

- Files, items, discussion forums, web links (URLs), and assessments are exported, but certain components may be excluded. For example, topics in discussion forums are exported, but grading, which is not supported by other LMSs, is not.
- The IMS common cartridge standards don't currently support all assessment question types or attributes, so exported tests and pools won't include incompatible questions.

Common cartridge exports a course into a single folder of content. Each content area is then exported as a sub-folder inside the main course folder. For example, you export a common cartridge package from a Blackboard Learn course and then re-import it. Your course has a single content area that contains a folder for each original content area and a content area that contains all the web links.

How-to link: https://help.blackboard.com/Learn/Instructor/Course_Content/Reuse_Content/Export_and_Archive_Courses

3) Download files from the Content Collection

If you are interested in primarily the files you have uploaded to your course, then you can download those files and folders in a Zip file.

How-to link: https://help.blackboard.com/Learn/Instructor/Course_Content/Content_Collection/Create_and_Edit_Content/Upload_and_Download_Packages

Or use BbDrive to access your Content Collection directly on your PC Desktop for copying files and folders (http://help.sset.jhu.edu/download/attachments/10485887/Bb_Drive_instructions.pdf)

**Do I have to notify you (OK to archive, don’t archive)?**

You do not have to notify us if it’s OK to archive, or which course(s) not to archive. Please use the Course Archive interface if you want to defer certain courses from this round of archiving.

How To Steps at http://help.sset.jhu.edu/x/CgBqAw

**Will linked content break?**

No, content should not be removed if there is more than one link to a particular file. However, we will also retain the archive(s) for one year in case you need to retrieve content.

**I’ve left, can you contact X whose taken over the course?**

We would be glad to contact another person to follow up. However, we would encourage them to work with your School's faculty support.

**Will you tell students?**

We are not contacting students.
Have More Questions?

Send questions to blackboard@jhu.edu with "Blackboard Course Archiving" in the Email Subject.