



## End of Academic Year Housekeeping Guide

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## 1. Introduction

This guide explains the processes for re-use and archiving of Moodle courses. Moodle provides considerable flexibility when it comes to archiving and “clearing out” courses for a new academic year or cohort.

As with paper-based work, each Department is responsible for making and storing archive copies of Moodle courses which may be required for audit at a later date. Although central backups are made by BUCS, these are for disaster recovery purposes only.

Although no data is automatically deleted from Moodle at the end of an academic year or any other point, students will be unenrolled from their Moodle courses if these are linked to SAMIS units or programmes which they have completed.

**N.B Staff are able to override this in Moodle and specify their own unenrolment date by using the SAMIS block. More details at: <http://go.bath.ac.uk/qhou>**

If a student logs into Moodle after they have been removed from the respective unit or programme in SAMIS (or if they are no longer part of the current cohort) then they will be removed from the relevant Moodle courses automatically. Rather than wait for your students to log in before they are unenrolled, it is possible to remove them manually yourself, as described in section 4 of this guide.

### The options

Before proceeding with either of the options outlined below it is strongly recommended that you first make a complete backup of your existing course including user data. This can then easily be restored if you encounter any difficulties.

There are 2 main options if you wish to re-use your existing Moodle course in a subsequent year:

1. Restore a “clean” copy of the course. This will remove all previous user data (and all other resources/activities if these are not required).
2. Unenrol the previous year’s students from the course. This will remove students, but records of their participation, for example forum posts or wiki contributions will remain and be visible to new students (unless groups have been used).

There are other possible options:

- Keep using the same course but set up separate groups for each year cohort, so all user data remains in one course but you separate different cohorts’ participation. Managing groups in Moodle courses can be complicated, so please contact the e-Learning team about this.
- You could simply delete or hide activities and resources which you do not want the current cohort to use.

## 2. How to backup and save a Moodle course for archiving

Before removing students or re-using a Moodle course for another academic year or cohort you should first make a complete backup and save this file in a secure location outside of Moodle. Given the importance of creating backups for audit purposes, your Department may have a specific space available for this (perhaps a shared network drive).

To backup a course in Moodle, go to the course that you would like to backup. In the **Administration** block, click on **Backup**.

During the next step of the backup process, you can select all or just some of the activities/resources within your Moodle course.

To backup the entire course, select **All**. You can also choose to backup user data if you wish.

**Course backup: What's new in 1.9 presentation (WNP)**

Include All/None: All/None

- Assignments  User Data
- Uses of a VLE  User Data
- Databases  User Data
- Nitin's Crisps Database  User Data
- Moodle activities database  User Data
- Forums  User Data
- News forum  User Data
- Quizzes  User Data
- Quiz demo  User Data
- Resources  User Data
- JISC Infonet Introduction to VLEs  User Data
- Test Document  User Data
- Wikis  User Data
- My First Wiki  User Data
- Presentation wiki  User Data

**Users** Course

**Logs** No

**User Files** Yes

**Course files** Yes

**Site files used in this course** Yes

**Grade histories** No

**Backup role assignments for these roles**

- Administrator
- Course creator
- Teacher
- Non-editing teacher
- Student
- Guest
- Authenticated user
- Shared Question Creator
- Shared Question User
- Pharm\_Mentor
- Teacher Read only
- Inspector

All/None

Continue Cancel

### Granular Backup Options

You can select specific elements of your course to backup.

#### Users

Selecting “All” will backup users, both Teachers and Participants, in the course.

#### Logs

Selecting “Yes” will backup the activity logs associated with this course.

#### User Files

Selecting “Yes” will backup user documents, such as those uploaded during the Assignment and Wiki activities.

#### Course Files

Selecting “Yes” will backup uploaded documents / pictures

If in doubt, backup everything! You can always select specific resources or activities in the course to restore later if necessary.

Once you have made your selections, click on **Continue**. The next step is to confirm the file name (we suggest that you leave this as the default), as well as your backup options. Click on **Continue** again to confirm.

Once the backup is completed, it will be confirmed. Click on **Continue**.

The backup, in zip file format, will appear in the “BackupData” folder in your Moodle course files. This can be found by clicking on **Files** in the Administration block.



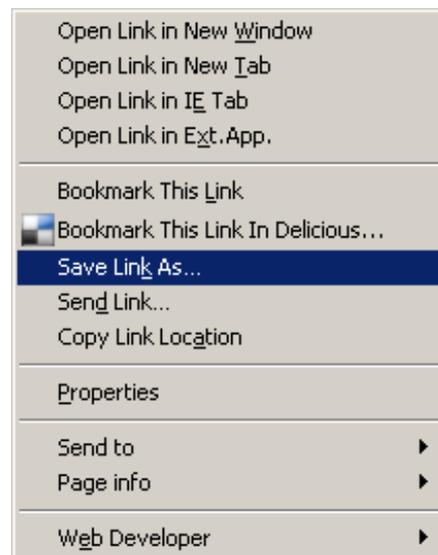
The filename will contain the course short name, the date and time of when the backup was created - as above.

### Saving the backup file outside Moodle

If you wish to save this backup file outside of Moodle:



in **Internet Explorer**, right click on the backup file that you wish to save, and from the drop down menu, select “Save Target As...”



in **Firefox**, right click on the backup file that you wish to save, and from the drop down menu, select “Save Link As...”

### 3. How to restore a “clean” copy of a course

This process involves making and then restoring another backup, which overwrites the existing course. The first option is to exclude just user data. This will retain all activities and resources in your course, but remove user data. You may alternatively wish to make a completely blank backup without user data, activities or resources. Restoring this will give you a completely empty course shell.

Prior to replacing an existing course with a “clean” copy, it is recommended that you back up the course, including user data, in case it is needed for any reason in the future (see Section 2 for instructions).

- Firstly you need to make a backup of the course without user data (and without activities/resources if these are not required).
- Click on **Backup** in the course administration menu.
- If you wish to keep activities and resources ensure all of the items in the left-hand column are ticked (see Figure 1). If you wish to delete everything in your course and start again with a completely blank course untick all the items on the left.
- Untick all of the **User data** boxes.
- For the further backup options choose:
  - Metacourse - No
  - Users - None
  - Logs - No
  - User files - No
  - Course files - Yes (or for a completely blank course with no copies of previously uploaded files select No)
- Click on **Continue**.
- Edit the Backup file name at the top of the screen so that you can recognise the backup as not containing user data. e.g. backup-mycourse-no-user-data.zip
- Scroll down and click on **Continue**.
- Click on **Continue** again.
- You will see the backup file which has been created listed in your course files area.
- Click on **Restore** to the right of the backup file name (Figure 5), then click on **Yes** to continue (Figure 6).



Figure 5: Backup file in files area

You are about to start the restore process for:

backup-staff\_area-20090804-1227.zip

Later in this process you will have a choice of adding this backup to an existing course or creating a completely new course.

Do you want to continue?

**Figure 6: Continue restore process**

- On the next page scroll down and click on **Continue** again.
- Select **Restore to current course, deleting it first** (Figure 7)

**Course restore: backup-staff\_area-20090804-1227.zip**

<b>Restore to</b>	<input type="text" value="New course"/>	
Category	<input type="text" value="Existing course, deleting it first"/>	
Short name	<input type="text" value="Existing course, adding data to it"/>	
Full name	<input type="text" value="Staff Area"/>	
Course start date	<input type="text" value="26"/> <input type="text" value="April"/> <input type="text" value="2006"/>	
<b>Include</b>	<b>All/None</b>	<b>All/None</b>
	<input checked="" type="checkbox"/> Choices <ul style="list-style-type: none"> <li><input checked="" type="checkbox"/> Which Moodle activities would you like to learn more about?</li> </ul>	without user data
	<input checked="" type="checkbox"/> Forums <ul style="list-style-type: none"> <li><input checked="" type="checkbox"/> Staff Area News forum</li> <li><input checked="" type="checkbox"/> Staff Area Discussion forum</li> <li><input checked="" type="checkbox"/> Staff development opportunities in e-learning</li> </ul>	without user data
	<input checked="" type="checkbox"/> Glossaries <ul style="list-style-type: none"> <li><input checked="" type="checkbox"/> Frequently Asked Questions (FAQs)</li> </ul>	without user data
	<input checked="" type="checkbox"/> Personal Journals <ul style="list-style-type: none"> <li><input checked="" type="checkbox"/> Your reflections and comments on Moodle</li> </ul>	without user data
	<input checked="" type="checkbox"/> Labels <ul style="list-style-type: none"> <li><input checked="" type="checkbox"/> ...for general advice and support</li> <li><input checked="" type="checkbox"/> To discuss or share ideas and practice with other...</li> <li><input checked="" type="checkbox"/> Moodle Docs for Teachers from Moodle community we...</li> <li><input checked="" type="checkbox"/> The tutorial below introduces some of the new fea...</li> <li><input checked="" type="checkbox"/> If you have any comments about the tutorial, plea...</li> </ul>	without user data

**Figure 7: "Restore to" options screen**

- Click on **Continue**
- Click on **Restore this course now!** (Figure 8).



Figure 8: confirmation to restore course

- You should see a message saying **Restore completed successfully**.
- Click on **Continue** again.

## 4. How to unenrol students from a course

Prior to unenrolling students from an existing course, it is recommended that you back up the course, including user data, in case it is needed for any reason in the future (see Section 2 for instructions).

Although most data from unenrolled students will still be accessible in the course, for example forum and wiki contributions, some will not, for example submitted assignments. These can however be accessed from a course backup file.

To unenrol all students from a course:

- In the course administration menu click on, **Assign Roles** and then **Students**.
- Click on the name of the first student.
- Hold down the Shift key and click on the name of the last student.
- Students should now be selected (see figure 9)

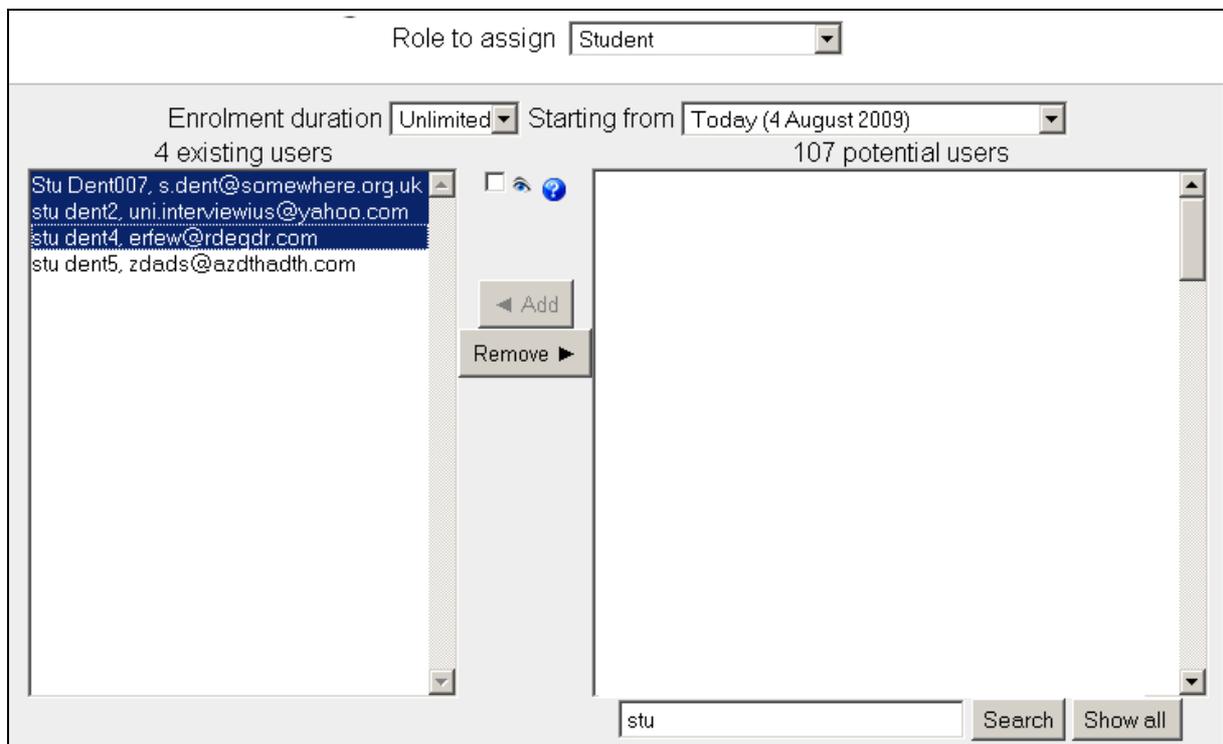


Figure 9: Unenrolling students

- Click on the **Remove** button to remove the students from the 'existing users' column.

## **5. How to restore an archived version of a Moodle course**

If you need to restore an archived Moodle course for any reason, please contact the e-Learning team at: [e-learning@bath.ac.uk](mailto:e-learning@bath.ac.uk).

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