

ACADEMIC AFFAIRS COUNCIL

AGENDA ITEM: 5 – B (2)

DATE: March 31, 2016

SUBJECT: LMS Administration Guidelines

Since Desire2Learn (D2L) was selected as the common learning management system in 2007, a number of guideline documents have been developed to establish a common approach to the implementation of D2L across the system. Over time, these guidelines have come forward to AAC for review and discussion (i.e., purging and archiving, early access, etc.); however, the lack of an overarching guideline structure has resulted in a number of questions about the current system approach for managing the LMS environment. Considering the staff transitions that have resulted since D2L was selected in 2007, a set of guidelines have been developed and vetted through the D2L management committee with a goal of formalizing many of the decision points that have been made over the past decade.

AAC first discussed the proposed guidelines at the February 2016 meeting, and members requested an opportunity to have campus personnel review and make recommended changes one more time before approving. As a result of that discussion the guidelines were vetted with the D2L management committee one final time and agreed on a number of minor revisions, which have been incorporated into the guidelines draft. One area that did generate a great deal of discussion was the following paragraph in the proposed guidelines, which came from an earlier set of template guidelines approved by the committee in 2013:

As was previously the case, instructors can add additional links after these standard navigation items, but can neither remove nor rearrange these items, thus ensuring consistency from course to course, institution to institution. That said, due to the flexibility these link groups provide, institutions are allowed to determine the default content of the link groups themselves, in order to meet the unique needs of each institution; however, whatever tools are selected to be the default for an institution must be categorized as follows, for the sake of navigation consistency:

The source document of this statement was originally phrased as a recommendation to the D2L Management Committee, and thus contained verbiage such as “propose” and “recommend.” These were stripped when added to the overall guidelines—attached to this agenda item—as they had been approved and implemented by the committee in 2013. SDSU voiced concerns about this,

(Continued)


RECOMMENDED ACTION

Discussion and recommendation.

stating that their interpretation was that they were free to change the order of the standard navigation items to accommodate their institutional needs. The leadership of the committee—Ruth Peters, RIS, and Eric Mosterd, AAC—did not share this interpretation, as AAC’s position has always been to have a standard navigation order, so as to provide consistency for multi-institutional students, and recalled that the committee had voted to approve the standard navigation order.

To clarify this, the committee held another vote on whether or not to have a standard navigational layout for D2L. The vote was 5-1 in favor of leaving the verbiage cited above intact; ergo, requiring all institutions to use the same standard navigational layout (Course Home, Content, Assessments, Communications, Resources). While SDSU supported the common naming for the standard links and for the link groups, as well as the ordering options for the items in the link groups, they did not support a standard ordering of the main navigational layout, again, citing the needs of the institution, and recommended that the section cited above be amended to allow for this.

AAC representatives should be prepared to discuss the final set of guidelines and take action to implement for future management of the common LMS platform for the system.

		<h1>ACADEMIC AFFAIRS GUIDELINES</h1>	
Section 18:7_ :		E-Learning Guidelines	
Title:		Learning Management System Guidelines	
Number (Current Format)		Number (Prior Format)	
---		XVII	
Reference		Date Last Revised	
BOR Policy 3.5: Confidentiality of Student Records BOR Policy 3:22 Public Access to Student Directory Information BOR Policy 7:6 Technology Purchases		02/2016	
Related Form(s)			

I. Policy Overview

This document serves as an omnibus of various guidelines governing the administration and use of the BOR Learning Management System (LMS), Desire2Learn (D2L).

In August of 2006, a thirty-one member LMS task force was assembled with student, faculty and staff representation from across the South Dakota Board of Regents' system. As a result of the LMS selection process a comprehensive Request for Proposal (RFP) document was created with professional consultation from WICHE/WCET staff. This process led to the recommendation that Desire2Learn be accepted as the system's Learning Management System ¹.

Per D2L's RFP response, "[D2L's] learning platform is the result of seven years of intense R&D and close work with our institutional and academic clients, including the University of Wisconsin System, University of Guelph (Ontario's largest Distance Education program), Minnesota State Colleges and Universities, Florida Distance Learning Consortium, and hundreds of additional schools, colleges and universities. The result is an exceptional platform with an easy-to-use and learner-centric interface and a minimal learning curve, allowing you to get started quickly and grow with ease toward your stated future objectives of increasing eLearning capabilities and positioning the University system to further evolve as a learning organization."

II. D2L Management Committee

The D2L Management Committee was established shortly after the adoption of D2L, in 2007, to manage various aspects of the central LMS. This included providing both academic and technical guidance as D2L was implemented, as well as developing recommendations as to the proper academic and technical management of the system. To that end, each [institution is] allowed to appoint one academic representative and one technical representative². When voting, each institution has one vote.

The committee [is] lead by a staff member of RIS and the BOR office, with RIS taking the more active leadership role in the day-to-day activities of the committee.¹

III. Use of Other LMS Tools

D2L is the official LMS of the BOR. Any use of an LMS beyond July 1, 2008 [should] be with D2L (per Agenda Item O, June 28-29, 2007 Board of Regents meeting).³

¹ https://www.sdbor.edu/services/academics/aac/documents/09-07AAC_5.A_D2L_implementation.pdf

² https://www.sdbor.edu/services/academics/aac/documents/5_G_AAC0614.pdf

³ https://www.sdbor.edu/services/academics/aac/documents/09-07AAC_5.A_D2L_implementation.pdf

The BOR's position is that it has made a significant investment into D2L—in terms of licensing, support, instructional design, QA, etc.—so it is the LMS designated for online course delivery. If an institution is interested in using an alternative to D2L—other than BOR-approved products (e.g. Pearson's My Labs Plus)—then that discussion needs to be worked through the appropriate councils, and must abide by existing policies (e.g. [BOR 3:5](#), [BOR 3:22](#), [BOR 7:6](#)), as it may impact a number of these areas.

IV. Template Standards for Current Version of D2L

With the new version of D2L—v10—there was a need to change the course template to accommodate changes in the D2L interface. Specifically, the amount of horizontal real estate has been dramatically reduced, so a new template needs to be created to address this. The changes in v10 afforded the management committee the opportunity to evaluate the current template standards and propose revisions.

A. Layout

Please see Appendix I for examples on current layout requirements for course templates.

B. Widgets

Please see Appendix II for examples on current requirements for widgets.

C. Navigation

Please see Appendix III for examples on current requirements for D2L Navigation.

V. Course Access Guidelines

The official start and end dates of courses facilitated via D2L follow the academic dates for courses as reflected in Colleague/WebAdvisor. That said, access to courses before the official start date, and after the official end date, have been modified to accommodate a variety of scenarios and to accommodate learners.

A. Start Dates

1. Students are allowed to access their courses in D2L thirty (30) days before the official start date, as reflected in Colleague/WebAdvisor, starting in the 2014FA Term. This is done to ensure students can identify any technical or access issues, and so that they can become familiar with the course's requirements prior to the start of the semester.
2. Faculty should not make any assignments prior to the first day of the term. This should be clearly communicated by the campuses to their instructors.
3. Regardless of this expanded start date, instructors ultimately govern student access to their courses by activating the courses: inactive courses are always inaccessible to students, regardless of the date. Any questions from students regarding early access to a course should be directed to the instructor.

B. End Dates

1. Students are able to access their courses in D2L thirty (30) days after the official end of the course, as reflected in Colleague/WebAdvisor.
2. Instructors must leave their courses activated during this timeframe.

VI. Add-Ons & Third-Party Integrations

Like other LMSes, D2L provides a number of add-on products for its core LMS, and has the ability to integrate with a variety of third-party solutions. Should an institution want to investigate a D2L add-on product, or have a third-party tool integrated into D2L, it must follow the process outlined below.

A. Approval Process for Add-ons and Third-Party Integrations

Requests to review or utilize any D2L add-on, or integrate third-party tools into D2L, must first be vetted through the appropriate committees:

1. For publisher integrations, this would be the eText Committee.
2. For all other third-party integrations (e.g. those like Collaborate, Turnitin, etc.) this would be the D2L Management Committee. Part of this requirement is to determine if other institutions are also interested in integrating the tool.

These committees will discuss merits of the add-on or third-party tool—as well as any ramifications the tool might have with respect to student privacy, data use and protection, compliance with BOR policies (e.g. [BOR 3:5](#), [BOR 3:22](#), [BOR 7:6](#))—and then vote as to whether or not to approve moving forward with the evaluation of the add-on or integration of the third-party tool. The committee leadership (RIS and BOR representatives) will then determine how to best proceed.

If there is a cost involved with the add-on or third-party tool, institutions requesting the add-on/tool will be expected to secure funding for any one-time and on-going cost. With respect to the latter, such integrations may require additional approval from one or more of the BOR standing councils (AAC, BAC, or TAC).

VII. Course Retention Policy

The primary purpose for a system Learning Management System (LMS) is to provide a method for the common delivery of course content and tools delivering content and tools that are used to enhance the teaching and learning environment. Because the Student Information System (SIS) and course enrollment procedures employed throughout the system allow students to be enrolled for course delivered by multiple institutions in a given semester a common LMS is utilized. The LMS maintained by the South Dakota Board of Regents is only for the use of system employees and/or contractors who are teaching approved courses.

A. LMS Utilization

1. Instructors teaching credit or non-credit bearing courses that lead to degrees offered by one of the Regental institutions. Master Teachers instructing high school courses for the Center for Statewide E-learning (CSEL). Employees providing training courses to Regental system employees and/or enrolled students.
2. Students are eligible to take courses using the LMS if they are officially enrolled in the course at the time it is offered.

B. Training and Consultation

1. Instructors, contractors or employees using the system LMS must complete training provided by their primary campus.
2. Each Regental institution offers a series of classes and/or workshops on the use of the system LMS. The schedule of classes and/or workshops can be obtained by contacting the primary campus.
3. Course sites can be activated by any instructors, contractors or employees who have completed the required training at which time the course can be developed to include LMS features that support the learning outcomes of the course.
4. While using the system LMS instructors should recognize and prepare for occasional technical problems (i.e., server and network downtime).

C. Copyright and Intellectual Property

1. System and institutional polices pertaining to copyright of intellectual property, software and instructional materials govern ownership of course content on the LMS. All copyright regulations will be observed.

D. Hardware & Software Management

1. The LMS vendor owns the hardware and holds the software licenses required to manage the material on the course sites.

VIII. Purging Procedures

LMS course sites and materials are retained centrally for a period of time to allow instructors and students' ability to access valuable course information within a limited timeframe after a course has ended. Purging is a process of permanently removing course sites and content from the LMS. Routine purging of inactive course sites is necessary to increase disk space, further enhance performance, and ease system recovery for active courses.

A. Scope of Purging Procedures

1. This policy covers course sites and materials stored on disk space managed by the system LMS.
2. This policy does not cover materials stored in an individual's home directory, personal Web space, institutionally supported services, school-based media servers or departmental/school-based file storage space.
3. Purging an inactive course site permanently removes it from the LMS so that it is no longer accessible. When a course site is deleted it is also automatically removed from a user's course list. Instructors may restore purged materials by archiving items and then entering them into newly created courses at a later time.
4. All materials stored in the course site are deleted. This includes all files, grades, assignments, quizzes, surveys, links and anything else associated with the course site that is stored in the LMS database and file system areas.
5. Content stored outside of the system LMS and linked from within the course web site is not deleted. Rather, the links are deleted and would need to be re-established by the instructor. Instructors are required to develop their own procedures for long-term storage of their LMS materials which are detailed further in Section III of this policy.
6. Unused courses (i.e. inactive and have not been used, no content, no activities, etc.) will be purged in October each year. Those instructors who would like to retain the material in an unused course are responsible for branding the course before the purging timeline described in section II.B.

B. Purging Timeline

1. Beginning with the Fall 2010 semester all course sites will be retained for up to two years and then purged in compliance with other system and institutional policies related to course material retention.
2. Automatic deletions will occur once a year in October and will affect those courses that are more than two years old.

C. Purging Notification

1. RIS personnel will generate a list of courses with instructors slated for deletion according to the guidelines specified in section II.A. These lists will be distributed to campus personnel who are then responsible for communicating with faculty using the notification requirements detailed below.
2. An email reminder will be sent to instructors with courses slated for deletion two months prior to the October deletion date.
3. A second email reminder will be sent to instructors with courses slated for deletion one week prior to the October deletion date.
4. A final email reminder will be sent to instructors with courses slated for deletion on day prior to the October deletion date.

D. Course Retention Exceptions

1. Instructors who wish to use items or interactions from their archived courses in professional research, publications, or accreditation portfolios (or for any other professional purpose) should make arrangements with a system administrator to restore and maintain the most appropriate access to those materials in the system LMS.
2. Sandbox courses or course sites employed for orientation/training and faculty experimentation will be exempt from the purging policy.
3. Accreditation exception classes must present accreditation requirement to the D2L Committee for justification and approval.
4. Instructors may contact an institutional LMS administrator to assist in this process.
5. Faculty may also request that their course sites and materials be deleted earlier than this policy describes, by contacting the institutional LMS administrator.

IX. Archiving Procedures**A. Archived Records**

1. Archived course material will include items from the following LMS tools:
 - i. Checklist
 - ii. Competency
 - iii. Conditions
 - iv. Content
 - v. Custom Forms (i.e., attendance, self-registration, etc.)
 - vi. Discussions
 - vii. Dropbox
 - viii. Files
 - ix. Grade items and Settings (not student grades; see section 4 below)
 - x. Group Types
 - xi. Homepage
 - xii. Navigation Bars
 - xiii. News
 - xiv. Quizzes/Surveys
 - xv. Schedule
2. Faculty can archive the items specified above from the system LMS making them available for future use in active course sites. It is the responsibility of the instructor to restore any archived items as needed.
 - i. Instructors can archive or export a course using features available in the system LMS and save a copy to any desired backup location (i.e., local PC, flash drive, CD/DVD, etc.). Course data saved to a local hard drive should be included in the regular backup procedures for that computer.
 - ii. Instructors can also store files in other university systems when available.
3. When a new course is created in the future it is the responsibility of the instructor to move archived items into the new course. Instructors can use materials from older courses in newer courses.
4. The course export tool in D2L exports course content only, and no student data (grades, submissions, postings). There are other ways to archive student data, including the export grades to CSV files in Grades, downloading Dropbox folder submissions, and generating quiz reports (including student answers).

B. Non-Archived Records.

1. The system LMS does not serve as the archival record for certain types of course materials. There are other university systems which serve as the archival record of course, and the following course materials/content will not be backed up during the archival process:
 - i. Enrollments
 - ii. Attendance
 - iii. Web links
 - iv. HTML documents

X. Student Material

- A. In the event that student portfolio materials are available in the system LMS, the files will be stored in their entirety for two calendar years following the last date of attendance.

- B. Students are required to retain their portfolio or course materials, and the system or institution is not responsible for archiving materials prior to the deletion date.
- XI. Addendum A**
- A. For accreditation purposes only, exceptions have been made for courses in specific disciplines. Beginning with Fall 2007 the following courses will be available for 7 years:
 - 1. College of Education:
 - 2. College of Nursing:

APPENDIX I – D2L Course Template Layout

The template layout for D2L, prior to v10, consisted of three columns, as illustrated below:

The screenshot shows a D2L course page for 'MUS-100-U820T-2013SP Music Appreciation: Jazz-Mosterd' at the University of South Dakota. The page is organized into three columns. The left column contains navigation links such as 'Welcome Letter', 'Syllabus', 'Class Schedule', 'Course Walkthrough (Collaborate)', 'Peer Advice', and 'CDE Online Orientation Guide'. Below these is a 'Need Help?' section with a list of instructions. The middle column features a 'Welcome to MUS 100: Jazz Appreciation' message with a photo of students and a 'News Item' for 'Week 6: Swing'. The right column shows 'Updates' with 75 unread discussion messages, 3 quizzes not attempted, 1 new email, and 51 ungraded quiz attempts. Below this is an 'Events' section for 'Jazz @ the Icon Lounge' at 7:00 PM, and a 'YouTube Jazz Video of the Week' section.

The content filled the entire screen of the browser, so this worked well; however, in v10, D2L placed vertical bars on either side of the content area, shrinking the horizontal real estate:

The screenshot shows a D2L course page for 'CET-758-D01-2013SP Adv Instructional Programming-Wang' at DSU. The page is organized into two columns. The left column contains navigation links such as 'Getting Started', 'Calendar', and 'DSU Resources'. The right column features 'Instructor-Student Communication' with office hours and contact information, a 'News' section with no news to display, and a 'Content Browser' section with no content to display. The page is more compact than the previous version.

With these new restrictions—ostensibly part of making the overall interface more mobile friendly—the three-column layout from our previous template was too compressed. To that end, the subcommittee developed a two-column layout that was more suitable to v10, as illustrated above.

APPENDIX II - Widgets

Because of the elimination of one column of content, it was necessary rearrange the current widgets. Fortunately, new features of D2L v10 replaced some of the old widgets' functionality; namely, the Updates widget. To that end, many of the widgets that were previously in the right-hand column were simply been moved to the bottom of the left-hand column:

The screenshot displays a D2L course interface with two columns. The left column contains the following widgets:

- USD Getting Started**: A list of links including Welcome Letter, Syllabus, Course Walkthrough, Peer Advice, and CE Online Orientation. Below these are links for Academic Services, Student Services, and Technology Services.
- Calendar**: Shows the date Wednesday, February 13, 2013, and a section for upcoming events with a message: "There are no events to display. Create an event."
- USD Resources**: A link for I.D. Weeks Library.
- Role Switch**: A dropdown menu currently set to "My Role (Univ Instructor)" and a "Change Role" button.

The right column contains:

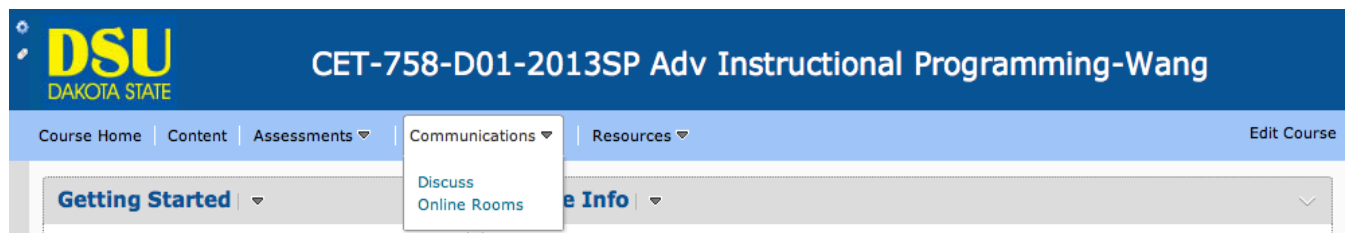
- USD Course Info**: A header with a dropdown arrow and a large image of a man playing a saxophone.
- News (times listed below are in Central Time)**: A section titled "Week Sixteen: Jazz Since the 1950s" with a close button (X). The news content includes:
 - Greetings all!
 - Welcome to the final week of Jazz! I don't know about you, but it went by pretty quickly for me. Anyway, here's what's on tap for this week:
 - Discussions/Lectures - the same, as per usual
 - Exam V review - this will be held after the lecture, just like the last review
 - In terms of Exam V, and finals week, here's how that will work:
 - Exam V will only cover two topics: John Coltrane and Jazz Since the 1950s; it will not be "comprehensive" per se, but you will still need to know basic facts about the previous movements in the context of these topics
 - Exam V will be available during finals week from midnight next Monday (5/4) at 12:00 AM in the morning to 5:00 PM next Friday (5/8) @ 5:00 PM CT
 - Other than that, Exam V will be like every other exam: a listening and written portion, with the same time limits and restrictions as the other exams
 - Finally, other loose ends:
 - Your final concert/album review is due at 5:00 PM CT on Friday (5/8). Late papers will NOT be accepted, as I need to have them graded and submitted by midnight.
 - Your grades will be available for another few weeks past finals, so if you are curious as to how you did, you can come back in and check on things.
 - IDEA EVALUATIONS: you should have received--or will soon be receiving--notifications to do an evaluation of the course. As was before, in order to "encourage" you to do so, I will be giving five

Not shown above are the Teacher and Student Guides widgets, which are below the Role Switch widget.

This layout preserved the same basic functionality of the previous template, but accommodated changes in the D2L interface for v10. As was previously the case, instructors can add additional widgets below these stock widgets, but can neither remove nor rearrange the widgets, thus ensuring consistency from course to course, institution to institution.

APPENDIX III – Navigation

Because of the limitation in horizontal real estate, the navigation bar needed to be revised as well. D2L v10 introduced a feature called link groups that accommodated this change. Link groups allow for a group of subordinate links to appear under headers in the navigation bar, as illustrated below:



Three of the items in the new v10 navigation bar are link groups: Assessments, Communications, and Resources. When a user clicks on one of these, a submenu appears, which in the case above, lists communication tools. This allows for both the preservation of space and flexibility.

As illustrated in the image above, the v10 template consists of five, standard navigation bar items:

- **Course Home:** takes the user to the course's front (home) page
- **Content:** takes the user to the course's content page
- **Assessments:** lists general assessment-related tools, like the Dropbox, Grades, Quizzes, etc.
- **Communications:** lists general communication-related tools, like Discuss, Collaborate, etc.
- **Resources:** lists other general tools, like Classlist, FAQ, etc.

As was previously the case, instructors can add additional links after these standard navigation items, but can neither remove nor rearrange these items, thus ensuring consistency from course to course, institution to institution. That said, due to the flexibility these link groups provide, institutions are allowed to determine the default content of the link groups themselves, in order to meet the unique needs of each institution; however, whatever tools are selected to be the default for an institution must be categorized as follows, for the sake of navigation consistency:

ASSESSMENTS	COMMUNICATIONS	RESOURCES
Awards	Blog	Calendar
Attendance	Chat	Classlist
Checklist	Collaborate	Clickers
Dropbox	Discuss	FAQ
Grades	Groups	Glossary
Quizzes	Journal	Links
Rubrics	Locker	User Progress
Self-Assessment		
Surveys		

Institutions are also allowed to order these alphabetically, or by priority.

Instructors can add/remove items from these link groups, but must also adhere to the categorization above. Note: an instructor cannot change the templates, so in order to change the link groups, the instructor needs to create his/her own, and then add them to the template. For this reason, the committee suggested that institutions populate the link groups with the most commonly/frequently used tools to avoid the need to do this.