Survey Research Operations
Survey Research Center ▪ Institute for Social Research

Archiving Blaise 5 Projects

As of September 15, 2021

For more information or feedback, contact:
SRO Blaise Archive Team (SroBlaiseArchive@umich.edu)

Introduction

SRO maintains an archive of project records and documentation that supports the design and management of new studies and ongoing longitudinal projects. As the technologies used in a study change, so too do the archiving processes needed to preserve access to these records over time.

Blaise 5 provides a rich environment for collecting survey data and paradata in different modes. This technical initiative will provide instructions on how to fully archive a Blaise 5 study so that all the data and paradata collected is still accessible and available over time.

As project resources are often in flux and resources may be reassigned, it is strongly recommended that the **project lead/tech lead** request that each project be archived as soon as data collection has been completed, the Blaise instrument is no longer active and is not needed for case finalization or anything else. It should be no later than 4 months after the Blaise instrument has been closed out. This prevents loss of project knowledge as tech leads and data managers move on to other projects. This also keeps the back-end servers clean and eliminates points of failure. Once archived, the live instrument will no longer be accessible, but **the data model and back-end data will be available to project staff upon request.**

Archiving will occur when the project data and instruments are moved to their respective archive locations which are accessible to project staff or others as needed. Once the data has successfully moved to its archive location the original data on the production server will be deleted. All test data is also deleted, but test data is NOT archived.

While it may be possible to bring an archived project back into a production state, it would be difficult or likely impossible to exactly replicate the entire environment due to the fact that as new builds of Blaise 5 software are released, which add new features and fix

existing bugs, the Blaise servers are upgraded which affects accessibility of older surveys. Projects that do need to be restored can be done on a case by case basis on a non-production server. A number of issues would need to be addressed, including an underlying reason of why the restoration is needed so that the archive team can make an appropriate determination of where to restore the project. This is a manual process and will be labor intensive. Cost estimation is dependent on the project request.

Blaise 5 File System Architecture

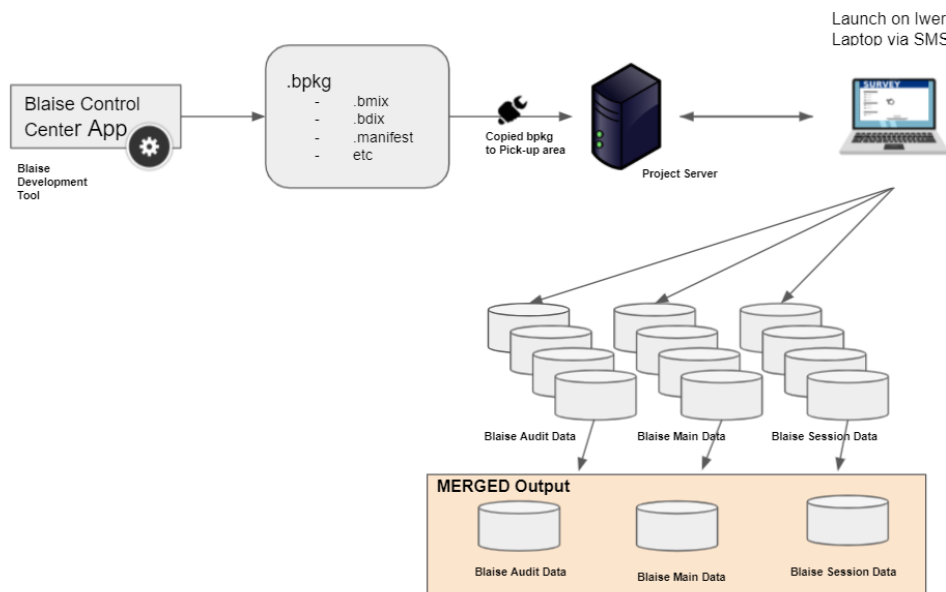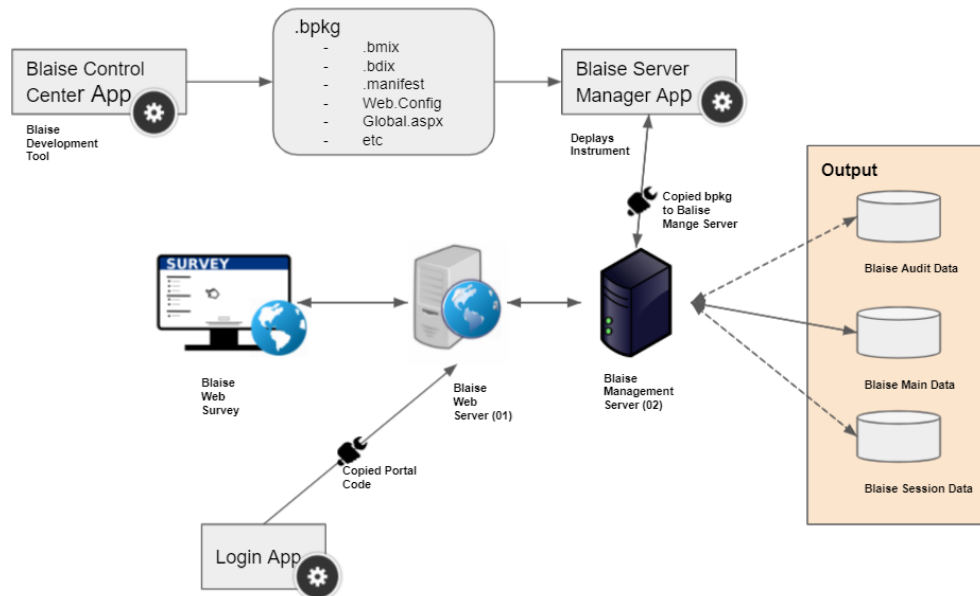**Figure1 - Blaise Desktop System Architecture**

Figure 2 - Blaise Web System Architecture
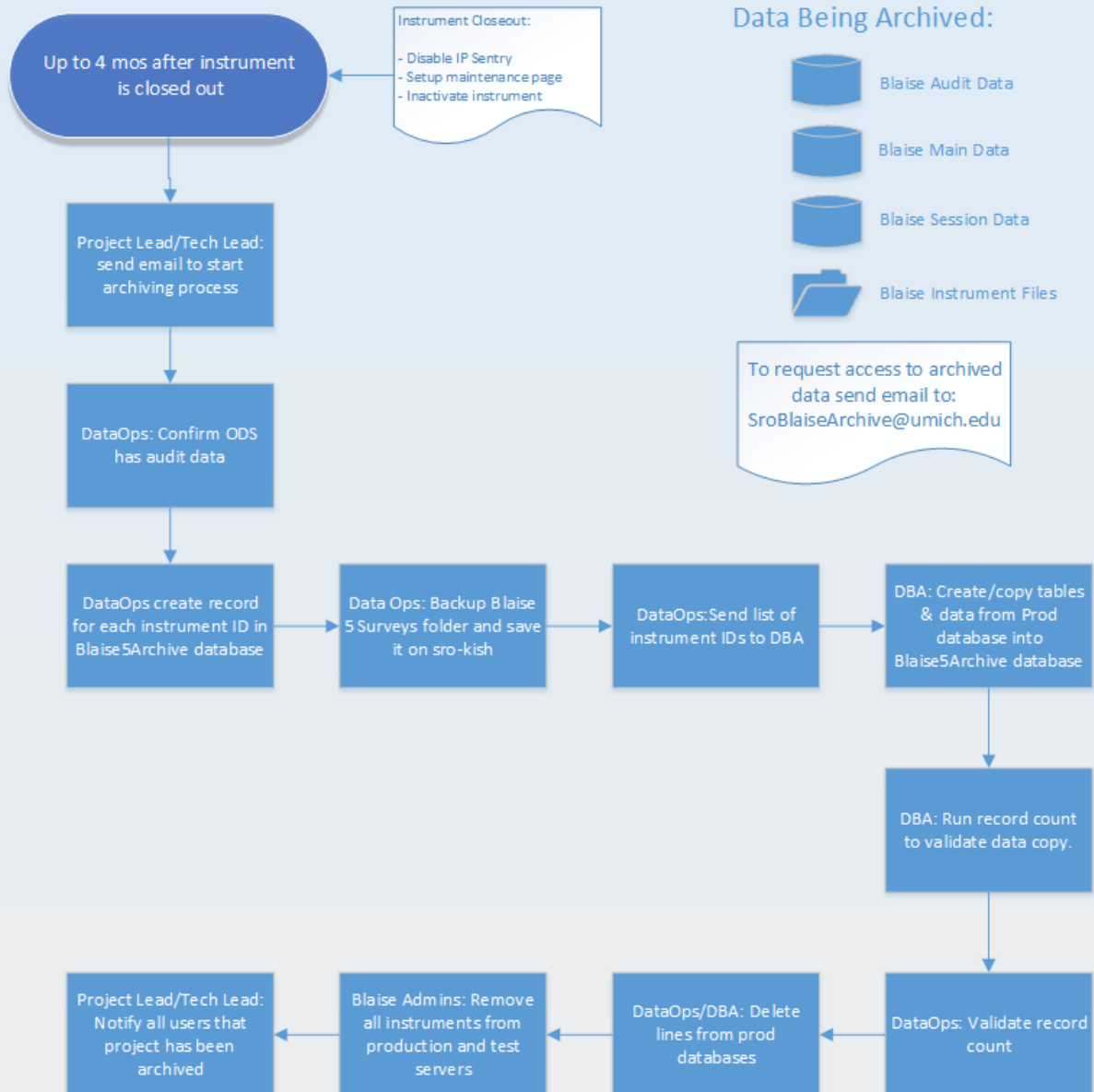
Archiving Projects

Figure 3 - Archive Workflow Overview

Survey Research Operations
Survey Research Center ▪ Institute for Social Research

Blaise 5 Archiving Workflow

Instrument Closeout:

- Disable IP Sentry
- Setup maintenance page
- Inactivate instrument

Up to 4 mos after instrument is closed out

Data Being Archived:

Blaise Audit Data

Blaise Main Data

Blaise Session Data

Blaise Instrument Files

To request access to archived data send email to: SroBlaiseArchive@umich.edu

Project Lead/Tech Lead: send email to start archiving process

DataOps: Confirm ODS has audit data

DataOps create record for each instrument ID in Blaise5Archive database

Data Ops: Backup Blaise 5 Surveys folder and save it on sro-kish

DataOps: Send list of instrument IDs to DBA

DBA: Create/copy tables & data from Prod database into Blaise5Archive database

DBA: Run record count to validate data copy.

Project Lead/Tech Lead: Notify all users that project has been archived

Blaise Admins: Remove all instruments from production and test servers

DataOps/DBA: Delete lines from prod databases

DataOps: Validate record count

Archive Workflow Steps

Step 1

The project's lead/tech lead sends an email to **SroBlaiseArchive@umich.edu**, **TSDataops@umich.edu**, and cc **sroBIPrdAdmin@umich.edu** to request a project be archived. Example text:

> "Blaise data collection for the following project(s) has been inactivated/closed out. Please archive project {Project Name} on Production Server Set {production server name} on/after {date}. {Project Data Manager} is the data manager for this project.
>
> Requested by: {your name}, {your role}"

NOTE: Please list all of the instruments that need to be archived.

Step 2

The project's data manager/DataOps must confirm the audit data has been parsed and included in ODS before the archiving can begin.

Step 3

The project's data manager creates a record for each instrument in Blaise5Archive.dbo.ArchiveList table with the following columns:

    a. ServerName - **(PK)**
    b. DatabaseName
    c. BlaiseVersion
    d. InstrumentName
    e. **InstrumentId - (PK)**
    f. **VersionDate - (PK)**
    g. **VersionTime - (PK)**
    h. **VersionNumber**
    i. StartDMDateTime **NULLABLE; UPDATABLE**

j. EndDMDateTime **NULLABLE; UPDATABLE**
k. Environment - {TRAIN|TEST|PROD}
l. ArchiveSchema (example: [Blaise5Archive].**[swel])**
m. ArchiveStatus - {If Archived then COMPLETE; else INCOMPLETE)
n. CreatedOn (DEFAULT getdate())
o. CreatedBy (current_user())

Step 4

The project's data manager backs up the ENTIRE Blaise5\Surveys\{Project Name} folder for the project from here:

SroBlPrd**01X** AND SroBlPrd**02X** \\{SERVERNAME}\Blaise5\Surveys

and places it here:

\\src-kish\sro\archiveData\Blaise 5 Project Archive\{Specific Project Name}

Step 5

The project's data manager sends the DBA (please CC Blaise Production Admin team and the Blaise Archive team) a list of all instrument IDs to be archived from the following databases where "X" denotes a server set:

SroBlPrd02X_Audit
SroBlPrd02X_Session
SroBlPrd02X_Main

Step 6

The DBA creates new tables in Blaise5Archive database based on that project's schema and copies the data over from the production databases. Some, but not all, projects WILL have data for SroBlPrd02X_Main and that DOES need to be archived as well. DBA needs to check every time! Access to these tables should be set to Read Only.
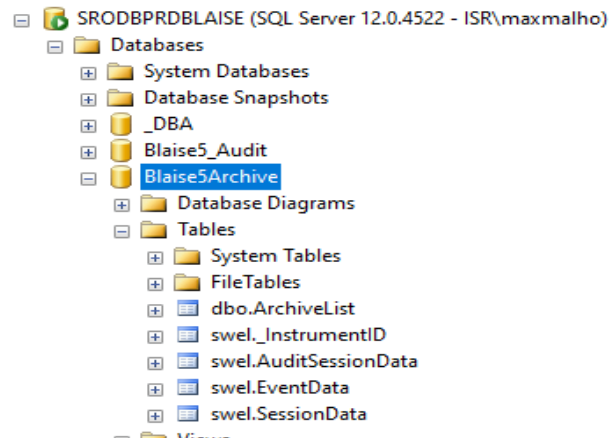
Example (With OLD SQL Production Server shown):

Step 7

The DBA runs a record count to validate the data has been copied in its entirety.

Step 8

After confirmation of record counts, the Blaise DBA sends email to SroBlaiseArchive@umich.edu and the project data manager:

> "The {Project name(s)} has/have been archived. Please cross check the expected count and perform line deletion on the originating database(s) once your cross checks are confirmed."

Step 9

The project's data manager performs a final records count verification and validates all data has been successfully copied over to the archive.

Step 10

The project's data manager deletes lines from the production database and then sends an email notification to the following groups:

    i. {PROJECT TEAM}

    ii. SRO Blaise Archive **SroBlaiseArchive@umich.edu**

    iii.   SRC Sysadmins **SrcSysAdmins@umich.edu**

    iv.   TS Data Ops **tsdataops@umich.edu**

    v.   SRO Blaise Production Admin **sroBlPrdAdmin@umich.edu**

    vi.   Kelly Chatain **kchatain@umich.edu**

    vii.   {Specific Project Stakeholders Email(s)}

With the following Message:

"Good Afternoon Team,

The {Project Name} project has successfully been archived.

Blaise Admins: Please remove {Project Name} instrument from {server names include tstcur and prdstg and prd}

The archived data can be found at {provide exact database and schema location and windows folder location.}

If you have any further questions or need any further Information please send your request to SRO Blaise Archive SroBlaiseArchive@umich.edu

Best Regards,
SRO Blaise Archive Group"

Step 11

Remove the {Project Name} from the production and test servers. (**Note:** this will remove any static or maintenance pages that existed for this project)

Step 12

Blaise Admins respond to previous email received from DataOps with the following message:

> "{Project Name} from {server names (include tstcur and prdstg and prd)} have been removed and the appropriate supporting files and IPSentry notifications have been deactivated.
>
> Best Regards,
>
> SRO Blaise Admins"

Archive Locations

There are two archive source locations: One for database tables containing audit, event, and session data, and another for the Blaise data model, database, and associated files for the project. The audit, event, and session data are typically stored as files (SQLite) or databases within SQL Server. Note: most projects store the survey data in SQLite, and then have audit, event, and session data with SQL Server. This is subject to change.

> a. Archived audit session data, event data, and session data are stored here:
>   i. Server: **SroDbPrdBl01** Database: **Blaise5Archive** (same READ rights as ODS)
>
> b. Archived Blaise files are stored here:
>   i. **\\src-kish\sro\archiveData\Blaise 5 Project Archive**

Other Notes

The Blaise server version can be upgraded during any point and is not linked to the archive process. This means even if the project has not been archived the server can still be upgraded. The archive process is not linked to the Blaise server upgrade schedule.

All projects MUST be archived prior to performing a **WINDOWS Server** upgrade. This is due to the fact that CMT highly recommends not doing an in-place server upgrade

(leaving old files in place), but rather start by clearing the server, and then recreate the server (no old files remain on the server).