

## ORDA Quick Tips Library

**ORDA is a secure, web-based system to manage the drafting and submission of your agency's Retention and Disposal Schedule.**

**Through ORDA, you can draft or import your disposal schedule, export your disposal schedule in different formats, and search across other approved disposal schedules for existing precedents. The Government Information Strategy Unit (GISU) within the Tasmanian Archive + Heritage Office (TAHO) will review your draft schedule within ORDA and provide comments to guide your development project. Collaboration between you and GISU to develop your disposal schedule, from draft to final approval, is conducted entirely through ORDA.**

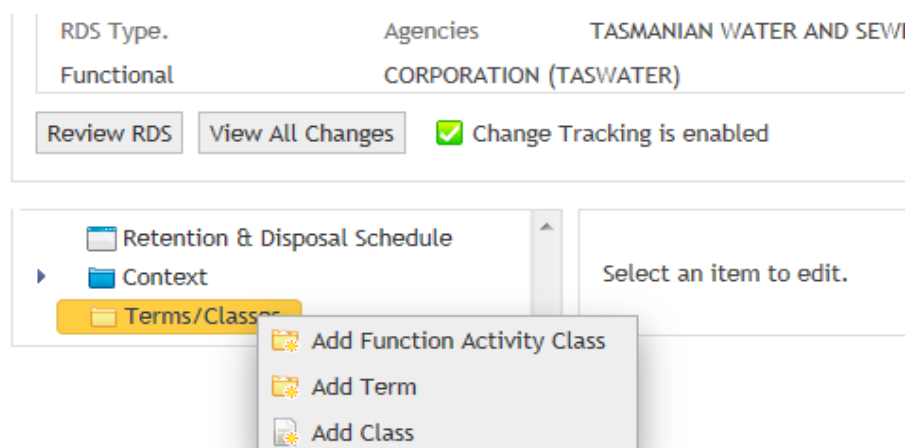
**The ORDA Quick Tips Library is a series of 'how to' documents designed to provide staged instruction to agency staff and representatives responsible for drafting schedules through ORDA.**

### OQT 3.4 – Adding terms and classes

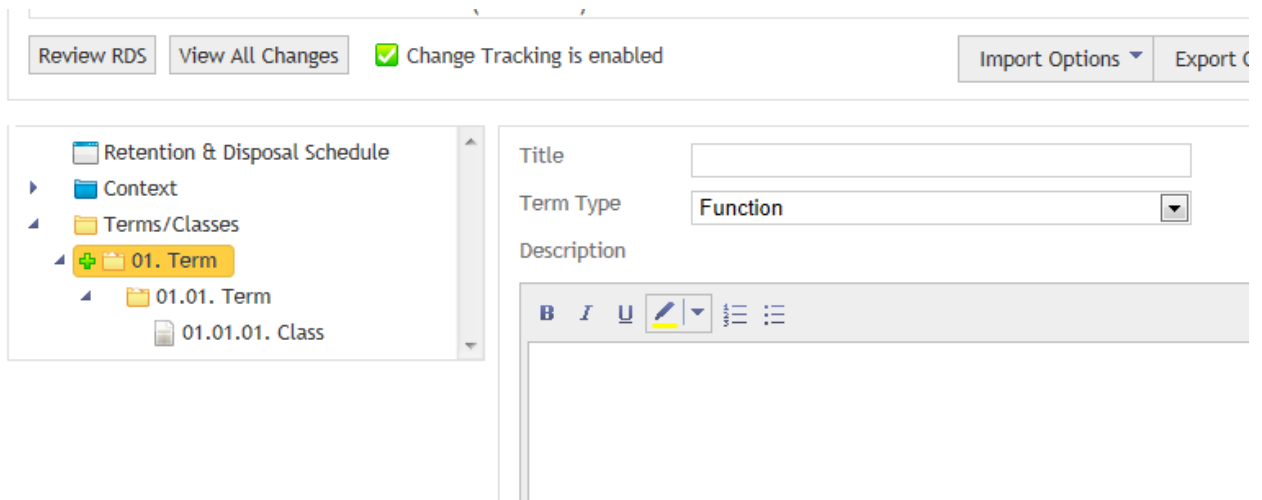
You can now start to build the body of your disposal schedule at the Term / Class level.

Add options	Description
Add Function – Activity - Class	Most disposal schedules will conform to the Function – Activity – Class structure. Selecting this option will automatically 'nest' the Activity within the Function, and the Class within the Activity.
Add term	This option will add a single Term (eg a Function, an Activity, etc).
Add Class	This option will add a single Class as a first level class.

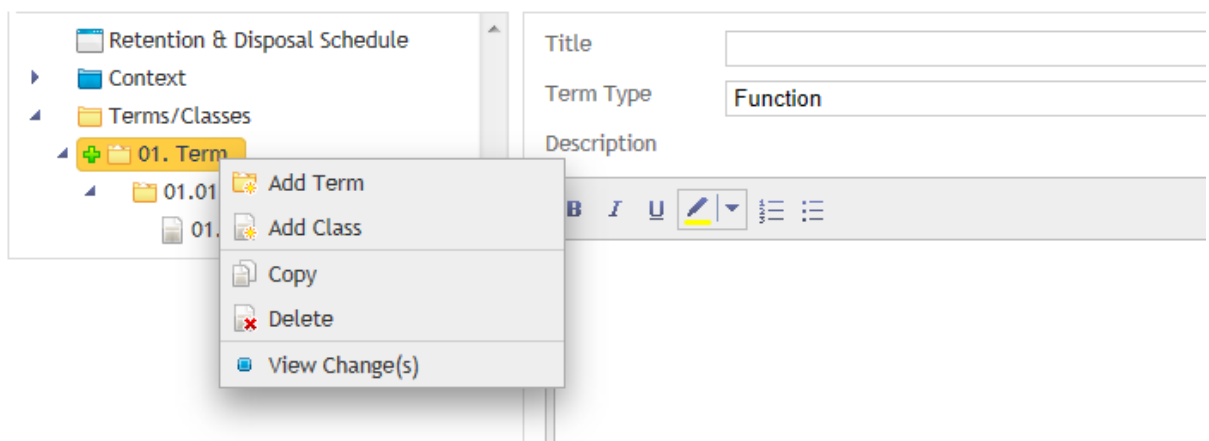
To add Terms / Classes, right-click "Terms / Classes" in the tree menu:



Selecting the **Add Function – Activity – Class** option will automatically create this nested structure as shown:



Once Terms / Classes are added, additional Terms / Classes at the same level, or the next level down, can be added by right-clicking the appropriate Term / Class and making a selection:



“Add Term” should be used when adding multiple activities that are part of a given business function.

“Add Class” should be used when adding multiple disposal classes that are part of a given activity.

Selecting “Copy” will place a duplicate of the selected Term (or Class) at the same level as that which is being copied. This can be used when wanting to re-use an existing description or to use that as the basis for further editing. Once a Term or Class has been copied, it can also be moved elsewhere in the tree menu.

If you wish to remove a Term or Class, right-click that entity and choose “Delete”.

**WARNING:** *Deleting a term will also remove any Terms/Classes that are nested within that entity.*

You can move any Terms/Classes within the tree menu by clicking on the Term/Class and, keeping your finger on the mouse, dragging it to where you wish to place it elsewhere in the tree menu. Using drag and drop will move any elements which are nested under a Term and will automatically re-sequence the numbering order for all Terms/Classes.

## Describing Terms

When Terms are added via the tree menu, you need to provide further information about them in the corresponding form:

The screenshot displays the ORDA system interface for adding a term. On the left is a tree menu with the following structure:

- Retention & Disposal Schedule
  - Context
  - Terms/Classes
    - 01. COMPLIANCE MANAGEMENT
      - 01.01. Term
        - 01.01.01. Class

The main form on the right contains the following fields:

- Title:** COMPLIANCE MANAGEMENT
- Term Type:** Function
- Description:** A large text area with a rich text editor toolbar (Bold, Italic, Underline, Bulleted List, Numbered List).

Below the form are two tables:

**"See" Reference**

Reference	Authority	Term	Description
No records to display.			

**Comments**

Comment By	Created On	Comment	Resolved
No records to display.			

You will need to provide each Class with a description. (Note that TAHO does not *require* agencies to provide a title for Classes, however it may be help to accommodate certain AKA exports). Text in the description field can be bolded, italicised, underlined, numbered or dot pointed if required.

The preferred titling format is as follows:

**Function title:** Capitalised

**Activity title:** Sentence case

**Class title:** not required

Ensure you click 'save' after entering descriptive information before moving on to the next element: the disposal table.

## Related TAHO Resources:

*Appraisal Statement for State records required as State Archives*

*Guideline 2 Retention and disposal of State records*

*Guideline 4 Agency determination of access restrictions*

*Guideline 6 Developing a functional records disposal schedule*

*Advice 2 All about appraisal*

*Advice 13 Writing disposal classes*

*Advice 28 Getting started on the development of an agency functional disposal schedule*

Information is available via the GISU website on relevant training programs recommended for agencies undertaking Retention + Disposal Schedule development projects.

## Contact us:

Government Information Strategy Unit  
Tasmanian Archive and Heritage Office  
91 Murray Street  
HOBART TASMANIA 7000

Telephone: 03 6165 5581

Email [GISU@education.tas.gov.au](mailto:GISU@education.tas.gov.au)

## Information Security Classification

This document has been security classified using the Tasmanian Government Information Security classification standard as PUBLIC and will be managed according to the requirements of the Tasmanian Government Information Security Policy.

## Document Development History

### Build Status

Version	Date	Author	Reason	Sections
2.0	August 2015	Sam Foster-Davies	Review	Introduction; Resources; Contact Us
1.0	December 2014	Sam Foster-Davies	Initial Release	All

## Amendments in this Release

Section Title	Section Number	Amendment Summary
Contact Us; Introduction		Updated Unit name and email address
Resources		Removed hyperlinks and updated to reflect revised tools

**Issued:** August 2015

**Ross Latham**  
State Archivist