

## 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 3.5 – Disposal elements - recommendations, actions and triggers

Each disposal class requires disposal recommendations, which specify what will happen to the records, and disposal justifications, which explain the reasoning behind each recommendation.

To enter disposal recommendations, click “Add” in the Disposal table:

The screenshot shows the ORDA interface. On the left is a tree view with the following structure:

- Items/Classes
  - 01. COMPLIANCE MANAGEMENT
    - 01.01. Breaches
      - 01.01.01. Class

The main content area contains a rich text editor with the text: "Records relating to serious breaches or failures by the Corporation resulting in significant penalties from regulatory bodies." Below the editor is a table with the following structure:

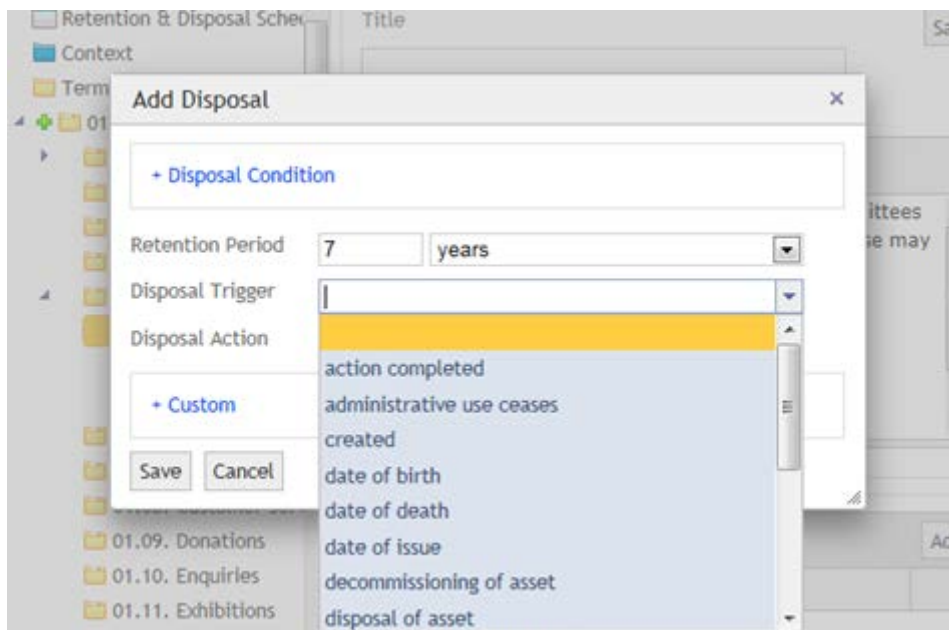
Disposal		Add
Disposal Action	Status	
No records to display.		

The "Add" button in the table header is circled in red.

For the **retention period**, enter the (minimum) number of years or months the records will be retained, and choose “years” or “months” from the drop down menu.

For the **disposal trigger**, choose from the generic ADRI triggers<sup>1</sup> provided in the drop down menu. Where business needs dictates, you may enter your own specific trigger as free text (there is no need to include the word “after” in this field as the system will insert this automatically). However, the need to enter non-standard triggers should be the exception rather than the rule, as the ADRI triggers are the widely accepted convention for disposal triggers.

<sup>1</sup> <http://www.adri.gov.au/content/products/disposal-triggers.aspx>



For the **disposal action**, select the appropriate action from the drop down menu.

The disposal actions should be assigned as follows:

**Destroy** – assigned to all temporary value records (including long term temporary retained in agency).

**Retain as State Archives** - permanent value records which will eventually transfer to TAHO

**Retain in Agency** - permanent value records which will be retained in agency (e.g. Acquisition registers for Museums).

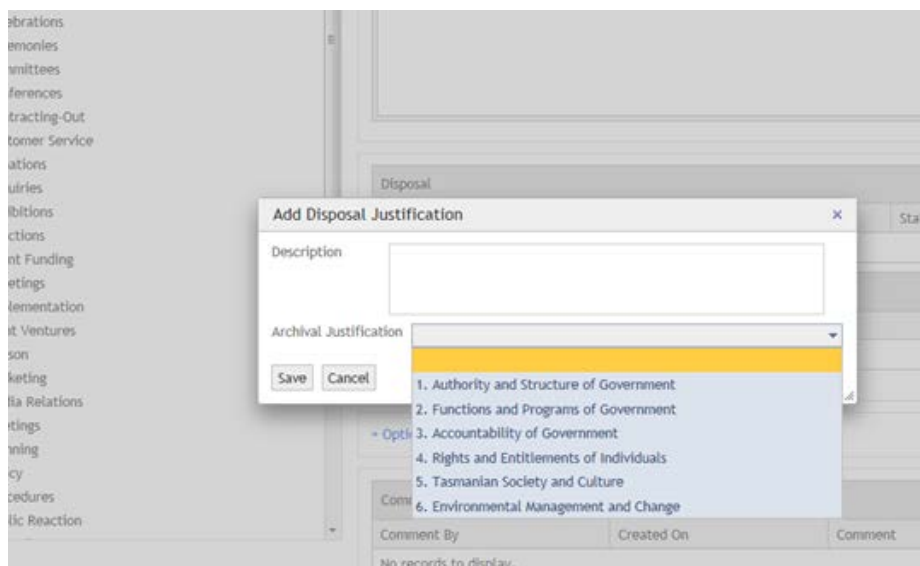
**Transfer** - those records that will need to transfer custody to another agency (as part of Government Administrative change, for example. Note this does NOT include permanent records for transfer to TAHO).

Once you click “Save”, the status information will automatically be expressed as a single statement. Note that the disposal recommendations can at any time be edited, deleted or added to:

Disposal		Add
Disposal Action	Status	
Destroy 7 years after action completed.	Temporary	Edit Delete

The Disposal Justifications table provides the basis for disposal recommendations to be supported by adding your rationale to the 'Description' field in this table. This free text field can be used to justify any decision to destroy or archive classes of records, cite schedule/class numbers of comparative records in other jurisdictions or legislative requirements, and to note any changes in disposal recommendations from a previous schedule, etc.

The Archival Justification drop-down list is intended to provide criteria against which decisions to archive records can be benchmarked against. All records recommended for transfer as State archives **must** be assigned a specific archival justification, in addition to any disposal justification criteria provided.



Once the selection from the menu has been made, click save.

Note that more than one archival justification can be applied - if required, simply click add, choose the appropriate menu selection and save to continue adding:

Disposal Justification		Add
Justification	Description	
1. Authority and Structure of Government		Edit Delete
3. Accountability of Government		Edit Delete

For more information on appraisal, including the list of disposal justification criteria and their definitions, see the TAHO Appraisal Statement available from the GISU website.

## 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.

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## 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

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