

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 6.1 – Workflow

Most of the collaboration between the agency editor and the GISU reviewer assigned to the disposal schedule is managed by an underlying workflow within the ORDA system. It is this workflow, and the selection of different options (by users) along the way, that dictate the path the process follows until finalisation by the State Archivist. The workflow stage, and the 'status' assigned to the schedule at a given point in time can also inform other functionality such as reporting, version control and search filtering/results.

To view the completed workflow steps of a specific RDS, you can click on the workflow hyperlink from the RDS table on the Retention & Disposal Schedule tab:

The screenshot shows the ORDA system interface. At the top, there are navigation tabs: Home, Retention & Disposal Schedules (selected), Search, and Help. Below the tabs is the heading "Create, Review and Edit Retention & Disposal Schedules". There is a "Show" button and a search box. The main content is a table with the following data:

RDS No.	Agencies	Type	Title	Status		
TEST04	Ambulance Tasmania	General	Common Administrative Functions	Draft	Workflow	Edit RDS
TEST03	Brighton Municipal Council	Sector	Testing UAT5 fixes - Local Government Records	Approved by State Archivist	Workflow	View RDS
TEST02	Department Of Health And Human Services	Functional	Testing UAT5 fixes - DHHS - Oral Health Records	Approved by State Archivist	Workflow	View RDS

At the bottom right of the table, it says "Displaying items 1 - 3 of 3". The "Workflow" link for TEST02 is circled in red.

This takes you to the Workflow screen, where you can view the stages that the schedule has passed through:

Review Date	26/08/2020		
Actions	No actions currently available		
History			
Status	Status Date	User Name	
State Archivist Approves RDS	26/8/2015	Samantha Foster-Davies	View RDS
Revised RDS Submitted	26/8/2015	Sam Foster-Davies	View RDS
State Archivist Revisions Issued	26/8/2015	Samantha Foster-Davies	View RDS
RDS Submitted to State Archivist	26/8/2015	Allegra Huxtable	View RDS
RDS Submitted to State Archivist	26/8/2015	Allegra Huxtable	View RDS
RDS Submitted to GISU Manager	26/8/2015	Sam Foster-Davies	View RDS
GISU Revisions Complete	26/8/2015	Samantha Foster-Davies	View RDS
GISU Revisions Issued to Agency	26/8/2015	Sam Foster-Davies	View RDS
RDS Submitted for GISU Review	25/8/2015	Samantha Foster-Davies	View RDS
RDS Registered	25/8/2015	Sam Foster-Davies	View RDS

In the above example (a schedule that has already been authorised by the State Archivist) you can clearly see the stages that the workflow has passed through before being authorised.

Status	Status Date	User Name	
State Archivist Approves RDS	26/8/2015	Samantha Foster-Davies	View RDS
Revised RDS Submitted	26/8/2015	Sam Foster-Davies	View RDS
State Archivist Revisions Issued	26/8/2015	Samantha Foster-Davies	View RDS
RDS Submitted to State Archivist	26/8/2015	Allegra Huxtable	View RDS
RDS Submitted to State Archivist	26/8/2015	Allegra Huxtable	View RDS
RDS Submitted to GISU Manager	26/8/2015	Sam Foster-Davies	View RDS
GISU Revisions Complete	26/8/2015	Samantha Foster-Davies	View RDS
GISU Revisions Issued to Agency	26/8/2015	Sam Foster-Davies	View RDS
RDS Submitted for GISU Review	25/8/2015	Samantha Foster-Davies	View RDS
RDS Registered	25/8/2015	Sam Foster-Davies	View RDS

Clicking on the [View RDS](#) link (see previous screenshot), will allow a view of the version of the RDS to display within ORDA, at the stage of the process selected. (Note that the import/export options have been greyed out - you cannot export a copy at this stage of the process, as the schedule has already been finalised).

Retention & Disposal Schedule

- Details

RDS No.	TEST02	RDS Title.	Testing UAT5 fixes - DHHS - Oral Health Records	Version	6
RDS Type.	Functional	Agencies	Department Of Health And Human Services	(Previous Version)	
				Last Updated	24/11/2014

Change Tracking is enabled

Retention & Disposal Schedule
 Context
 Terms/Classes
 01. ORAL HEALTH RECORDS

When there are a number of schedules under development, you can also use the 'status' as a filter to identify where schedules are sitting in terms of workflow progress. This is done by selecting the "Show" button on the Retention & Disposal Schedules tab:

Create, Review and Edit Retention & Disposal Schedules

Show

- Draft
- Submitted to GISU
- GISU Requires Revision
- GISU Revisions Complete
- Submitted GISU Mgr
- GISU Mgr Requires Revision
- GISU Mgr Revisions Complete
- Submitted to State Archivist
- State Archivist Requires Revision
- State Archivist Revisions Complete
- Approved by State Archivist
- Submitted Direct to State Archivist
- RDS Cancelled
- RDS Superseded
- [Show All]

	Type	Title
	Functional	testing the gisu changes
	Functional	test
	Functional	Common administrative functions
	Functional	Test

Of course, the most important part of the workflow is in the drafting, review and final approval process. A full diagram of ORDA's workflow can be found in Appendix I of this document.

Related TAHO Resources:

Appraisal Statement for State records required as State Archives
Retention and disposal of State records (2005: Guideline 2)
Agency determination of access restrictions (2005: Guideline 4)
Developing a functional records disposal schedule (2005: Guideline 6)

Records appraisal (2005: Advice 2)
Writing disposal classes (2005: Advice 13)
Getting Started on the Development of an Agency Functional Disposal Schedule (2012: Advice 28)

Relevant training courses include “Disposal Procedures” and “Developing an Agency disposal schedule”. Visit the training schedule at <http://www.linc.tas.gov.au/global/govtrecordkeeping/services/trainingevents/training>

Contact us:

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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
1.0	December 2014	Sam Foster-Davies	Initial Release	All

Amendments in this Release

Section Title	Section Number	Amendment Summary
		This is the first release of this document

Issued: December 2014

Ross Latham
State Archivist

1	<ul style="list-style-type: none"> • ORDA Admin creates agency/users and Disposal Schedule registration, and assigns [GISU reviewer] and [Agency editor/s]. • ORDA notification email received by [GISU reviewer] – advising they are the officer assigned as GISU reviewer for [name] schedule. • ORDA notification email received by [Agency editor] providing hyperlink to access ORDA, set password and commence drafting. 		
2	<ul style="list-style-type: none"> • [Agency editor] imports/manually completes drafting. The [Agency editor] must 'View all Changes' and 'Accept all Changes' to enable the 'submit' button (greyed out). • To advance the workflow, the Agency editor selects the 'submit' button on the Edit RDS screen. This opens the workflow screen, where the editor selects the 'Submit to GISU' button. • ORDA notification email received by [GISU reviewer] – advising [name] schedule submitted by [agency editor]. 		
3	<ul style="list-style-type: none"> • [GISU reviewer] logs in ORDA and selects relevant RDS from Retention & Disposal Schedule table, by selecting "edit RDS" link, and reviews schedule, adding comments as required. 		
4	<ul style="list-style-type: none"> • To advance the workflow, the GISU reviewer must return to ORDA's Retention and Disposal Schedule main tab, and select the "Workflow" link against the relevant schedule. There are two options: 		
5	(a) If GISU Require Revisions button is selected:	(b) If Submit to GISU Mgr button is selected:	
	<ul style="list-style-type: none"> • ORDA notification email received by [agency editor]. • Agency editor responds to comments/additional development undertaken, and resubmits to GISU • ORDA notification email received by [GISU reviewer] – advising [name] schedule submitted by [agency editor]. • [GISU reviewer] logs in to ORDA and selects "edit RDS" link of relevant schedule, and undertakes additional review. <p>To advance the workflow, the GISU reviewer must return to ORDA's Retention and Disposal Schedule main tab, and select the "Workflow" link against the relevant schedule. There are two options:</p>	<ul style="list-style-type: none"> • ORDA notification email received by GISU Manager advising review to be undertaken of [name] schedule. • GISU Manager logs into ORDA and selects relevant RDS to review, by selecting "edit RDS" link. • GISU Manager undertakes review. <p>To advance the workflow, the GISU manager must return to ORDA's Retention and Disposal Schedule main tab, and select the "Workflow" link against the relevant schedule. There are two options:</p>	
6	(a) If GISU Require Revisions button is selected [repeat step 5 (a)].	(b) If Submit to GISU Mgr button is selected [go to step 5 (b)]	(c) If GISU Mgr requires Revisions button is selected:
			<ul style="list-style-type: none"> o ORDA notification email received by [GISU reviewer] <p>When review is completed, to advance the workflow, the GISU reviewer must return to ORDA's Retention and Disposal Schedule main tab, and select the "Workflow" link against the relevant schedule. There are three options:</p> <p>(a) Return to agency for additional development [repeat step 5 (a)] OR</p> <p>(b) Make (minor) corrections and re-submit to GISU Mgr [repeat step 5 (b)] OR</p> <p>(c) Make (minor) corrections and submit direct to State Archivist for final review/endorsement [go to step 6 (d)]</p>
			(d) If Submit to State Archivist button is selected:
			<ul style="list-style-type: none"> o ORDA notification email received by State Archivist advising review to be undertaken of [name] schedule. o Notification email that the schedule has been submitted to the State Archivist is simultaneously sent to the Agency Editor. o State Archivist logs in and reviews schedule. <p>When review is completed, to advance the workflow, the State Archivist must return to ORDA's Retention and Disposal Schedule main tab, and select the "Workflow" link against the relevant schedule. There are two options:</p>
7			If State Archivist requires revision button is selected:
			<ul style="list-style-type: none"> o ORDA notification email received by [GISU reviewer] <p>To advance the workflow, the GISU reviewer selects from one of three options:</p> <ul style="list-style-type: none"> o Return to agency for additional development [repeat step 5 (a)] OR o Make (minor) corrections and re-submit to GISU Mgr [repeat step 5 (b)] OR o Make (minor) corrections and submit direct to State Archivist for final review/endorsement [repeat step 6 (d)]
			If State Archivist Approves button selected:
			<ul style="list-style-type: none"> o Notification email sent to [Agency editor] and cc GISU reviewer approving schedule.

