

## ORDA Quick Tips Library

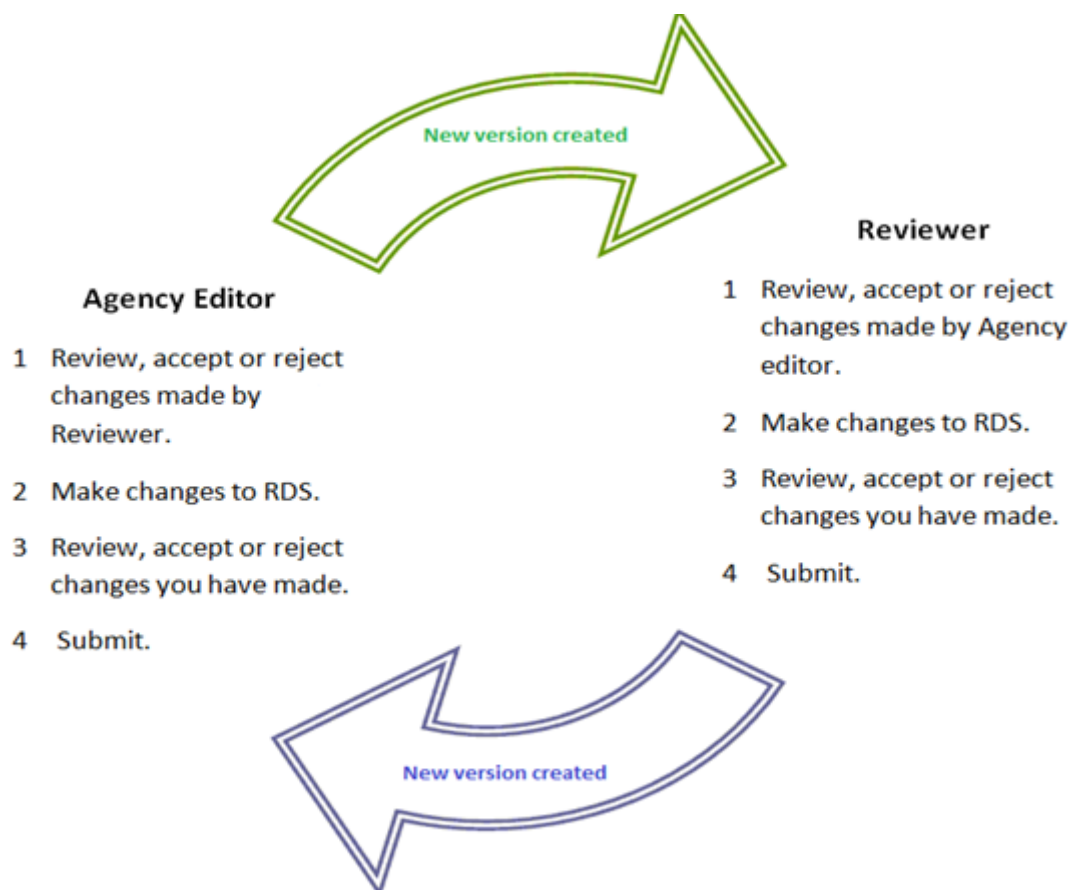
**ORDA is a secure, web-based system to manage the drafting and submission of your agency's Retention and Disposal Schedule.**

**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 6.2 –Track changes functionality

Track Changes automatically captures changes to text as well as the structure of the Retention & Disposal schedule (RDS), comparing the content of the current version of the RDS with the version immediately prior.



The tracking of changes is automatically captured by the ORDA application. The content and structure of the RDS is compared with the version immediately prior. A new version of the Retention & Disposal Schedule is created each time an RDS is 'Submitted.'

Two types of changes are tracked;

- Textual Differencing
- Changes to Structure (i.e. movement up/down tree).

Scope of changes that are tracked includes;

**Term** (e.g. Function, Activity)

Capture changes to term title, term type and term description.

**Class**

Capture changes to class title, class description, disposal justification, disposal action and custody.

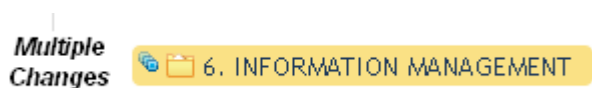
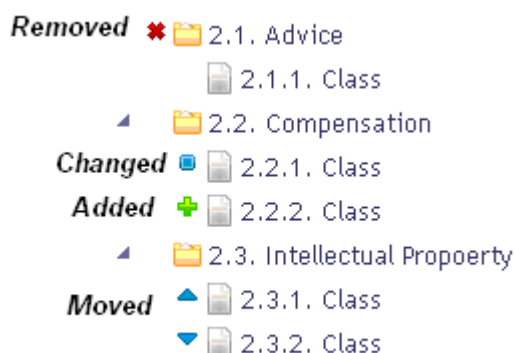
**Context**

Capture changes to context title, context type and description

The ORDA tree structure displays an indicator that there is a change in the RDS content that is either new or unresolved (Rejected).

When changes are made to the RDS, this triggers the creation of a flag in the tree structure that appears as an icon on the tree.

Similar to 'comments' functionality, the flag is initially at the Function level and then guides the user as they drill down to the appropriate level (i.e. Activity, Class).



**Key to tree icons, representing Change Tracking**

There are multiple ways users can review descriptions of what changed, comparison of prior/proposed changed and accept or reject changes.

Via the 'Edit Retention & Disposal Schedule' screen, the user can view changes by:

- Right clicking on individual nodes via Tree and selecting 'View Changes', or
- Clicking on 'View all Changes' button on 'Edit Retention & Disposal Schedule' screen, or
- Exporting Changes to Word via 'Export to Word' button.

The Change Tracking information displayed includes:

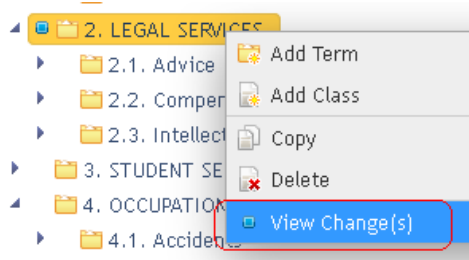
- Description of the change

- Prior version/value of what changed
- Buttons to 'Accept' or 'Reject' change

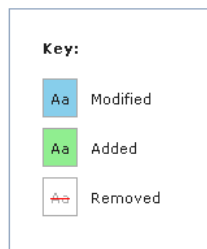
This functionality supports the User in systematically working through a review of changes.

When the change is accepted or rejected, information regarding the user, date and summary of change is captured and displayed via the existing Comments functionality.

### View Changes via Tree



Right click on tree



View Changes key

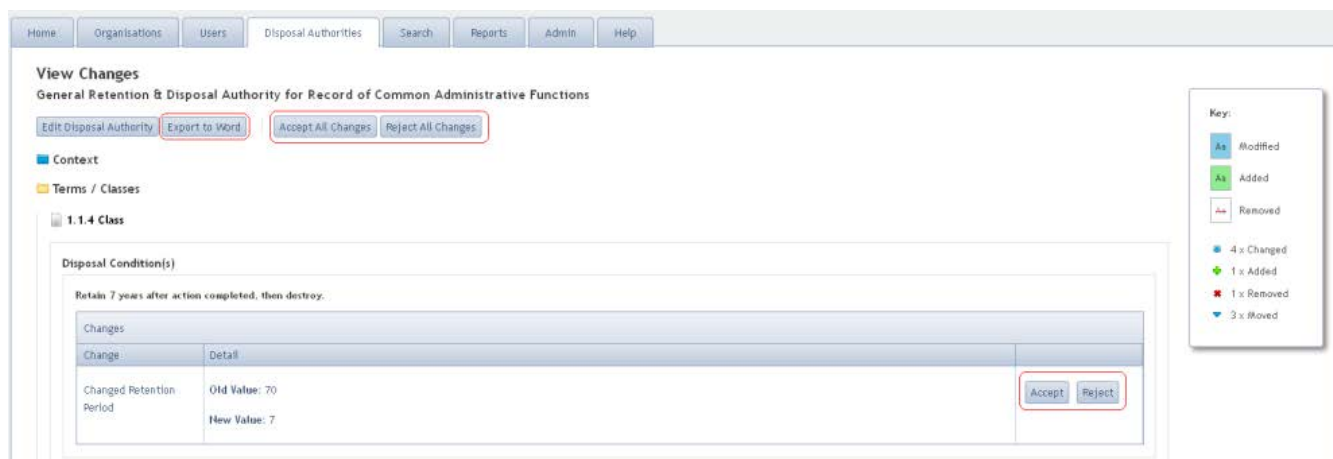


Changes to be reviewed and either Accepted or Rejected

### View All Changes



View all Changes – with ability to 'Accept all Changes', 'Reject all Changes', or Accept/Reject each individual change



View all Changes – option to Export to Word

### Comments – capture of user, date and summary of change

Comment By	Created On	Comment	Resolved
Edit Er	16/6/2014 11:11 AM	Change Rejected - A Disposal Condition was removed. Comment: should be reinstated	24/06/2014 by Michelle Novacco
Edit Er	16/6/2014 11:11 AM	Change Rejected - A Disposal Condition was added. Comment: this is not correct	24/06/2014 by Michelle Novacco
PROV Admin	13/6/2014 2:27 PM	Change Accepted - A Disposal Condition was removed.	16/06/2014 by Michelle Novacco

Accepting / rejecting comments automatically creates Comments to track user, date and action summary

Track Changes are initially indicated at the time the change has been made to the RDS.

The capture and flagging of changes at the time they are made supports that User in identifying, reviewing and validating their work before ‘submitting’ the draft RDS.

**The ‘Submit’ button is not enabled until the User either Accepts or Rejects changes they have made to that version of the RDS.**



Upon receipt of a new version of an RDS, changes that were made (and were accepted) in the version immediately prior are indicated, as well as changes from prior versions that remain rejected and have not been resolved / accepted.

For example – when a GISU reviewer receives a draft RDS, changes made by the Agency editor in the draft immediately prior are indicated / flagged. [Note, the Agency editor had reviewed and accepted changes they had made, as a validation, before submitting the draft.]

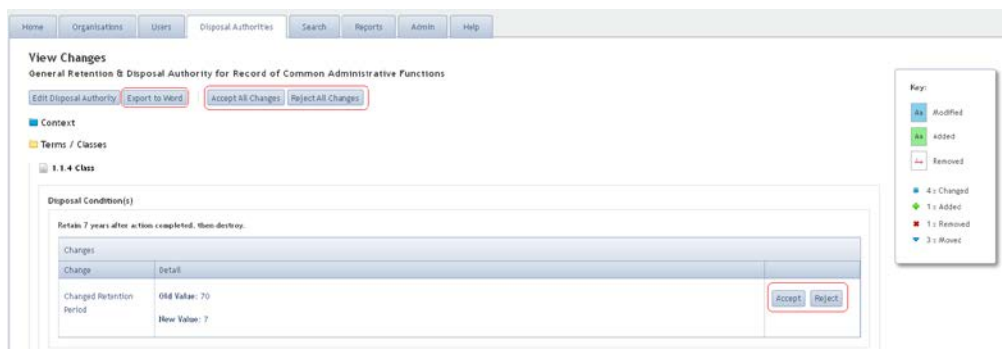
The GISU reviewer proceeds with their review of the Agency editor’s changes and either accepts or rejects them. Changes made by the Agency editor that are accepted by the GISU reviewer are no longer flagged as ‘changes’ in subsequent drafts of the RDS.

**Accept Changes made to previous version of RDS** - icon is removed from tree and the proposed change is applied. Comment automatically created that captures user, date and change summary data.

**Reject Changes made to previous version of RDS** - User is prompted to add a Comment (i.e. to detail why the proposed change was not accepted.) The change is not applied and the value before the change was made is restored.

A user has the option of Accepting or Rejecting changes all at once or the user can work through each change separately.

Track Changes should not accumulate from version to version of a Disposal schedule. They must be either Accepted or Rejected to ensure complete and systematic review of the Disposal schedule.



Track Changes are captured when change is applied to the application via either manual data entry or XML Import functionality.

The tracking of changes occurs for changes made via manual data entry directly into the application or via the ORDA XML Import functionality.

**NB:** change tracking via the CSV Import has not been developed at this time.

*Note that Node Ids must exist for Track Changes to occur via Import functionality. There must be an initial import or data entry (from which Node Ids are assigned). User can then export data, undertake edits outside of ORDA and then perform import. It is at the time of that import that Track Changes can occur.*

## 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