



Government of **Western Australia**
Department of **Culture and the Arts**
State Records Office of Western Australia

State Records Office of WA

Online Retention & Disposal Application (ORDA)

Agency User Manual

October 2015

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1. Introduction

About the Online Retention and Disposal Application (ORDA)

ORDA is a secure, web-based system to process the drafting and submitting of your organisation's disposal authority (e.g. Retention and Disposal Schedule).

Through ORDA, you can:

- Use the standard template provided to prepare / draft your disposal authority or import your disposal authority if prepared using other software tools.
- Export your disposal authority in different formats, including as a Word document with traditional look;
- Search across other approved disposal authorities for existing precedents.

The State Records Office (SRO) will review your draft authority within ORDA and mark any comments against it. In this way, collaboration between you and the SRO to progress your disposal authority from draft to final approval can be conducted entirely through ORDA.

About this Guide

This Guide provides step-by-step guidance in developing and submitting your organisation's disposal authority using ORDA.

System requirements

You can access ORDA through any modern web browser – you do not need to download any software to access the system.

NB: *If you are using Internet Explorer you will require version 8 or above for ORDA to display properly.*

Once you are logged into the system, if there is a 30 minute period of inactivity you will be logged out. You will need to log in again to proceed.

Contact details



SRO - State Information Management Services

sro@sro.wa.gov.au

ph. 9427 3661

2. Glossary

The purpose of this glossary is to explain the meaning of certain elements within ORDA.

Element	Description
Activity	Business activities are what an organisation does to carry out its business functions. Taken together, a group of activities will make up a business function. These activities do not overlap, although parts of them may be done by different business units within the organisation.
Class	Disposal classes consist of records performing or recording similar transactions and therefore have (generally) the same retention period and disposal action. In ORDA, sentencing of records (i.e. assigning retention periods and disposal actions) is done at the class level. Classes are identified in ORDA via the  icon.
Context	Context elements assist decisions within a disposal authority to be understood by documenting the wider organisational, legal and administrative framework in which disposal decisions are encompassed. In effect, this forms the introduction of a disposal authority.
Disposal Authority	Each WA government organisation is to retain and dispose of its records in accordance with an approved disposal authority. Disposal authorities can take the form of General Disposal Authorities, Sector Disposal Authorities, Retention & Disposal Schedules, Ad Hoc Disposal Authorities and Disposal Lists.
Function	A Function is a specific responsibility or obligation an organisation is assigned (to perform) by legislation, policy or mandate.
Retention & Disposal Schedule	A Retention and Disposal Schedule (R&D) is a disposal authority that covers a government organisation's core business records.
Term	Terms are keyword elements within which classes belong. Terms effectively contextualise classes and their disposal decisions. A term may be a function, an activity, a series, a subject or another generic element in which classes will form units of. Terms are identified in ORDA via the  icon.

3. Getting started

Please contact the SRO before you commence preparing your organisation's disposal authority.

The SRO will register all relevant details in ORDA and you will then receive an email notification containing a link to the system which lets you activate your user account.

The email notification contains your user name but you will need to set your own password to access ORDA. Your password must be at least 8 characters long. The system provides a password strength meter. Using a password that contains a mix of letters, numbers, lowercase/uppercase, symbols, etc will typically provide a more secure password. It is recommended that you choose a password of at least MEDIUM strength.

For security reasons, your password cannot be retrieved from the system. If you forget your password, please contact the SRO.

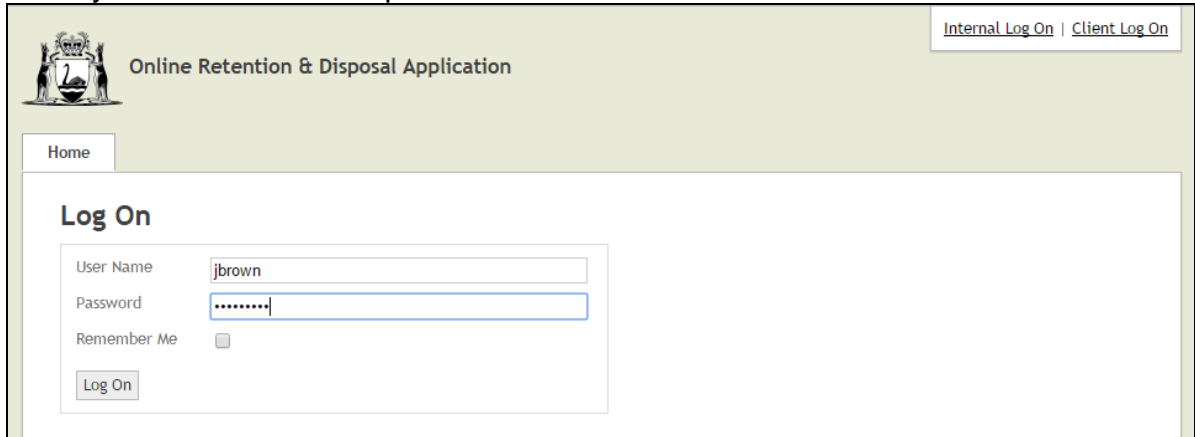
Once you have activated your ORDA account, you can access ORDA through the SRO website at:

<https://orda.sro.wa.gov.au>

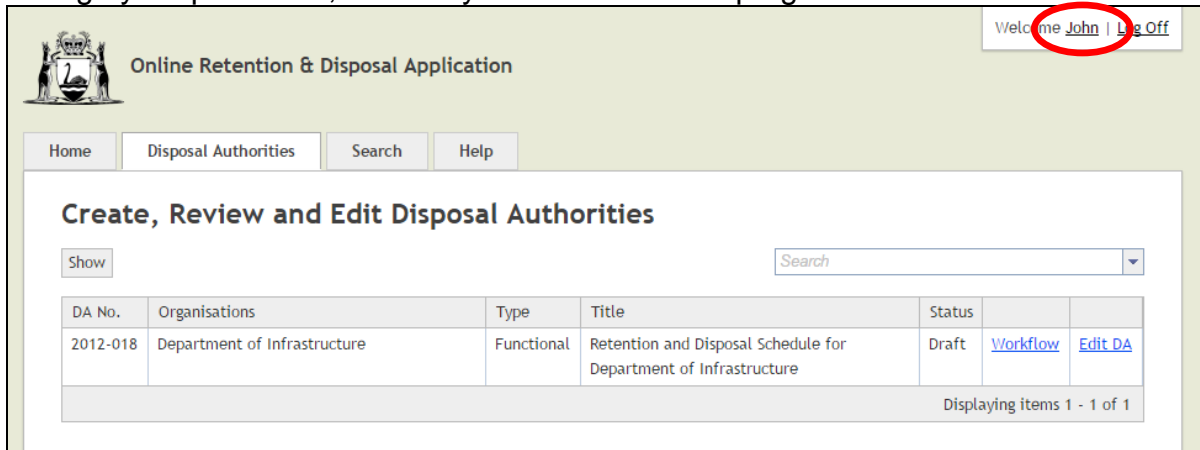
To log into the system, click on "Client Log On" in the top right hand corner of the screen:



Enter your user name and password:



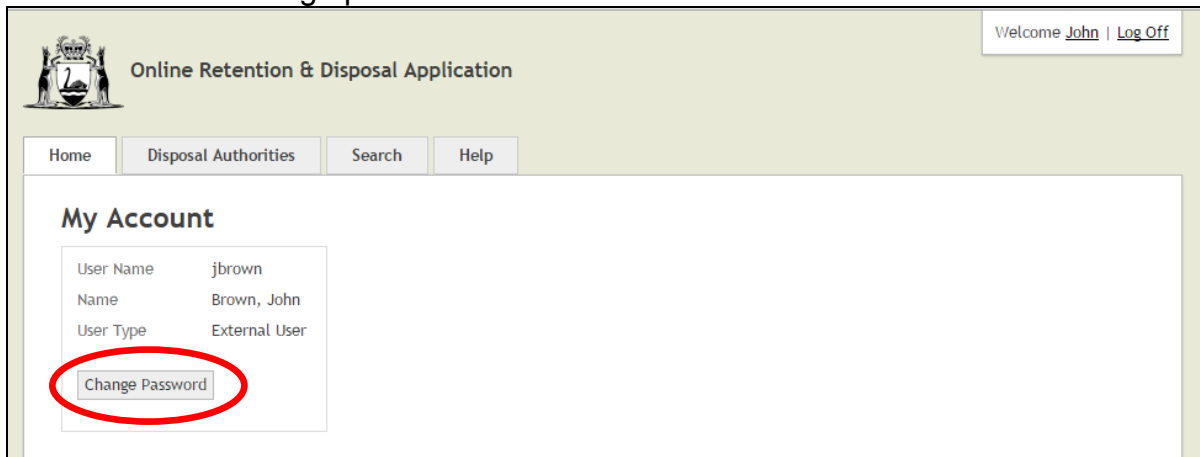
Once you have logged on, you will automatically be taken to the screen in which you can access any disposal authorities assigned to you. If at any stage you wish to change your password, click on your name in the top right corner of the screen:



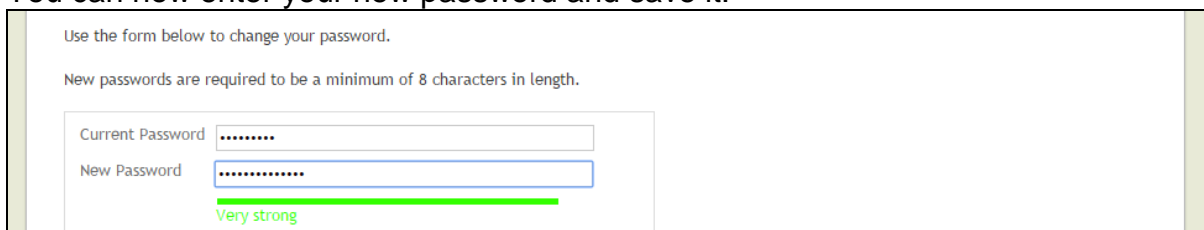
DA No.	Organisations	Type	Title	Status		
2012-018	Department of Infrastructure	Functional	Retention and Disposal Schedule for Department of Infrastructure	Draft	Workflow	Edit DA

Displaying items 1 - 1 of 1

Then click the “Change password” button:



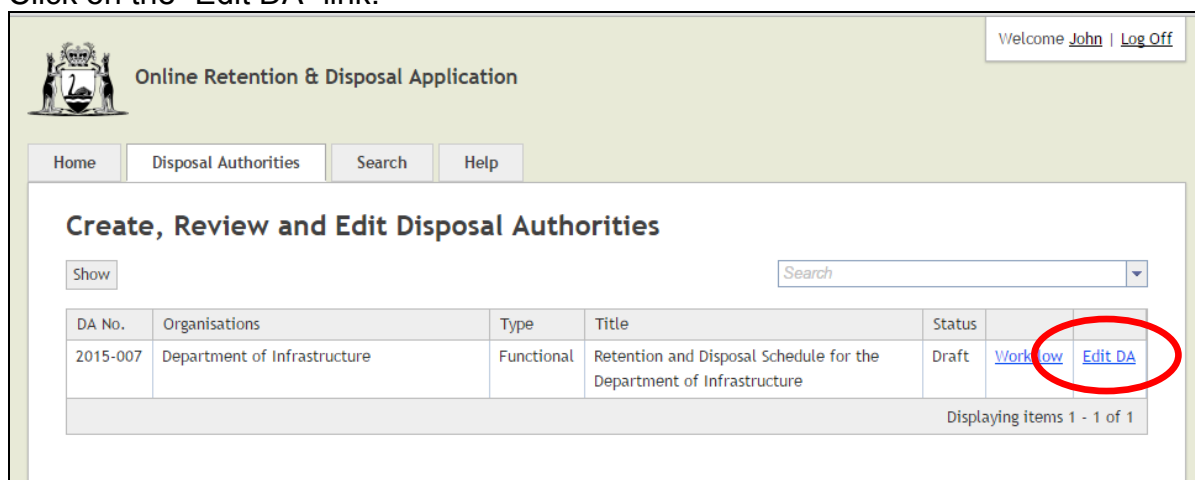
You can now enter your new password and save it:



4. Editing your disposal authority

Click on the “Disposal Authorities” tab to see the table of disposal authorities (or disposal authority) allocated to you.

Click on the “Edit DA” link:



Online Retention & Disposal Application

Welcome [John](#) | [Log Off](#)

Home Disposal Authorities Search Help

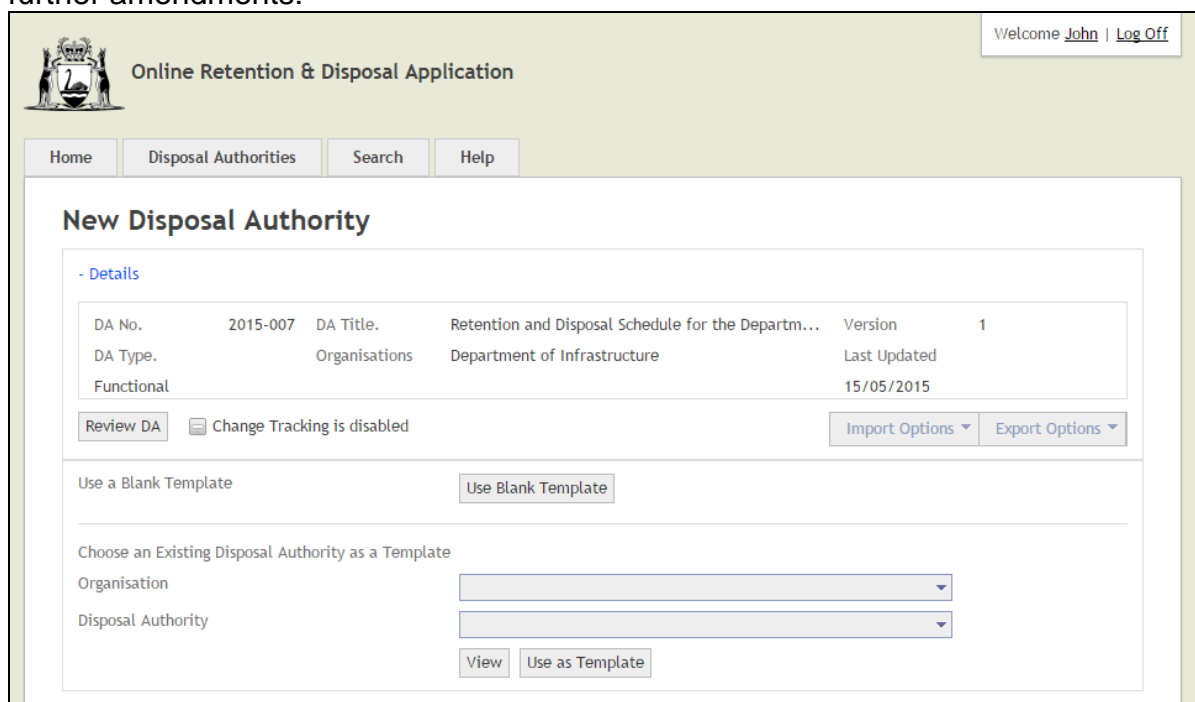
Create, Review and Edit Disposal Authorities

Show

DA No.	Organisations	Type	Title	Status	
2015-007	Department of Infrastructure	Functional	Retention and Disposal Schedule for the Department of Infrastructure	Draft	Workflow Edit DA

Displaying items 1 - 1 of 1

For a new disposal authority, you will be taken to a screen in which you can choose to use a blank template, or re-use an existing disposal authority in ORDA as the basis of further amendments:



Online Retention & Disposal Application

Welcome [John](#) | [Log Off](#)

Home Disposal Authorities Search Help

New Disposal Authority

[- Details](#)

DA No.	2015-007	DA Title.	Retention and Disposal Schedule for the Departm...	Version	1
DA Type.	Organisations	Department of Infrastructure		Last Updated	15/05/2015
Functional					

[Review DA](#) Change Tracking is disabled [Import Options](#) [Export Options](#)

Use a Blank Template [Use Blank Template](#)

Choose an Existing Disposal Authority as a Template

Organisation

Disposal Authority

[View](#) [Use as Template](#)

Unless your organisation has previously used ORDA to develop a disposal authority and you wish to re-use that for your new authority, you should select “Use Blank Template”. You will receive a message asking if you’re sure you want to use the blank template. Select “Yes”.

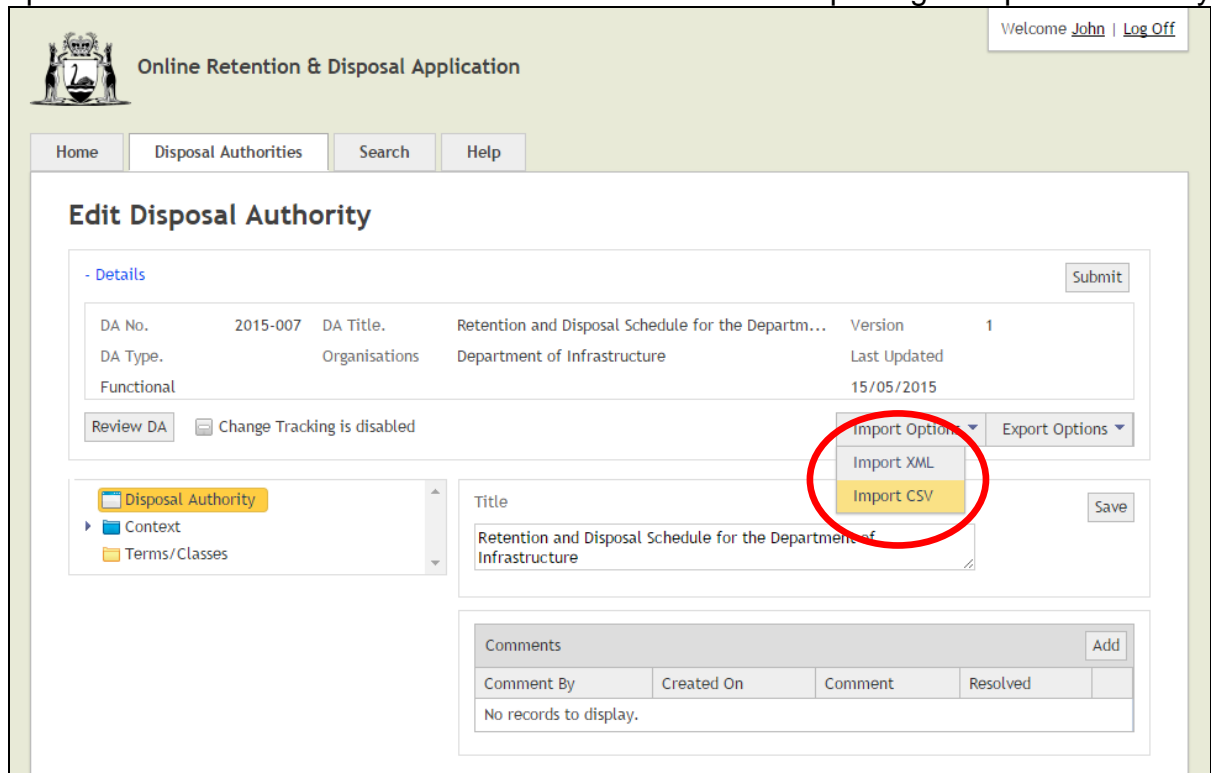
This will lead you to the screen in which you can draft or import your disposal authority:

The top part of this screen provides the basic registration details for your disposal authority, as well as the version number and the date it was last updated:

To collapse this section, click on the “- Details” link. This is recommended while you are drafting your disposal authority as it will provide more usable screen space. Clicking on the “+ Details” link will expand this section again.

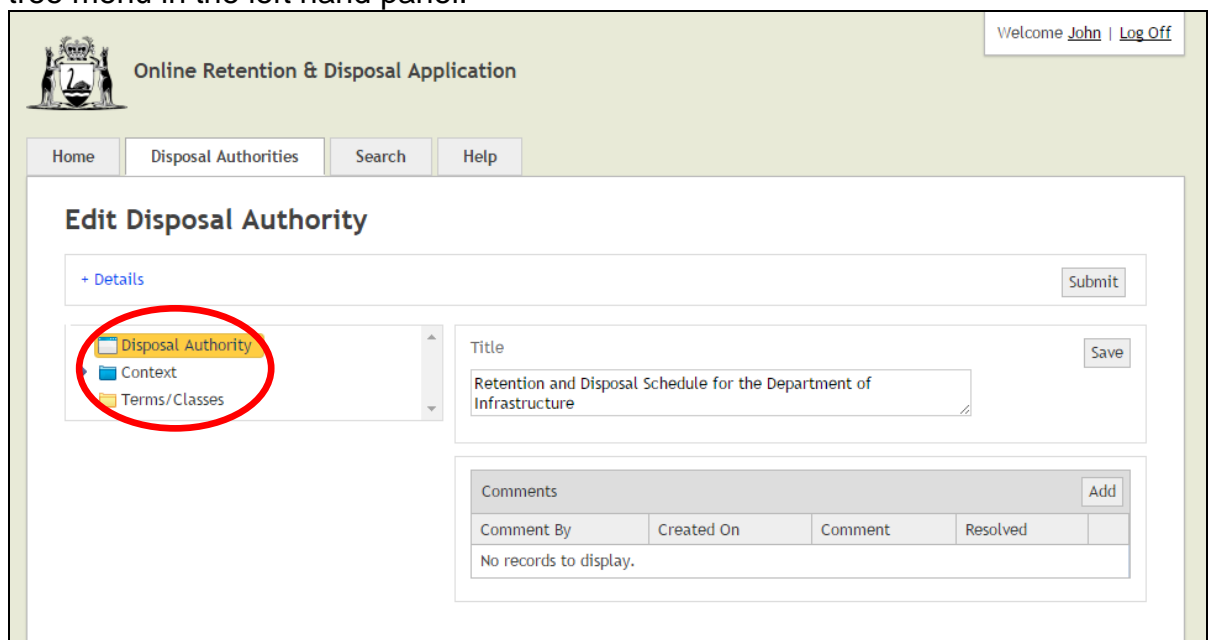
Selecting “F11” on your keyboard will also allow ORDA to display full screen which will assist maximising screen size even further:

If you are importing a disposal authority, this can be done via one of the import options. See Section 6 of this Guide for instructions on importing a disposal authority:



As you develop your disposal authority, you may review it as a single table by clicking on the “Review DA” button. Further information about reviewing your disposal authority is in Section 8 of this Guide.

There are three main “nodes” to the disposal authority template as displayed in the tree menu in the left hand panel:



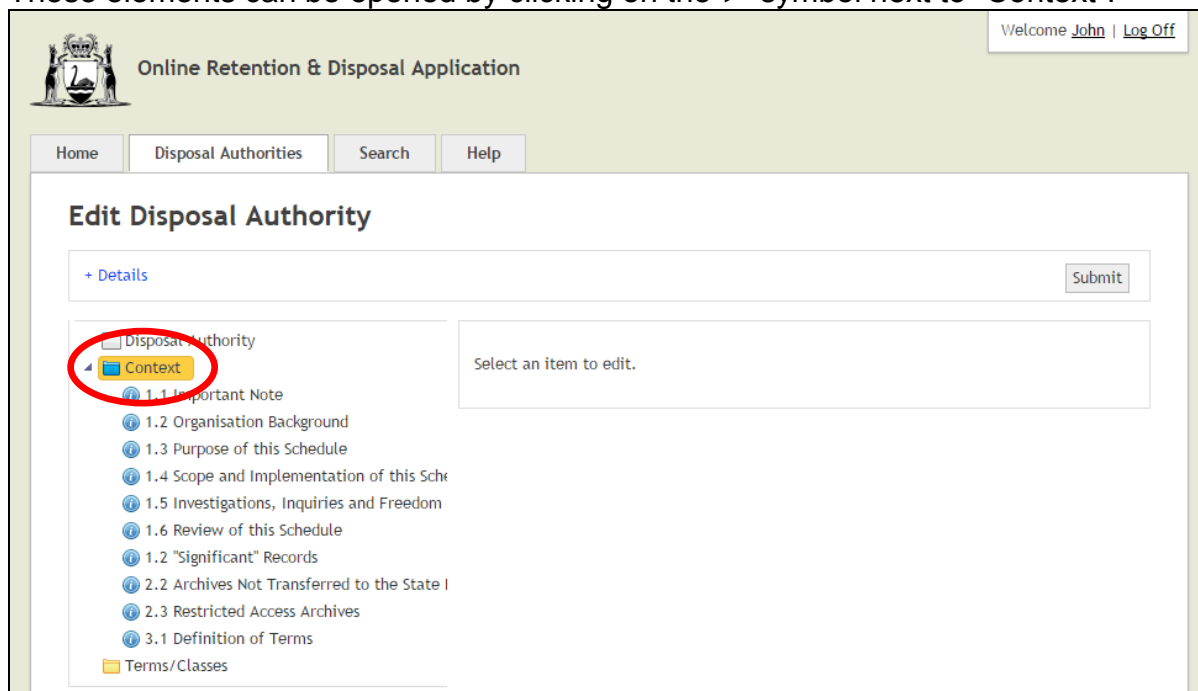
Node	Description
Disposal Authority	This provides the title of the disposal authority. The SRO will also provide general comments about the authority at this level when it is reviewed.
Context	This provides the context of the disposal authority. Background information about the organisation, the scope of the authority and any disposal protocols will be documented at this level. The SRO has pre-populated the main Context elements although you will need to update these where specified.
Terms/Classes	This constitutes the main body of the disposal authority. Information about the functions, activities, etc. of the organisation - as well as disposal classes resulting from these – will be documented at this level. At the class level, you can specify retention and disposal decisions for groups of records.

5. Drafting your disposal authority

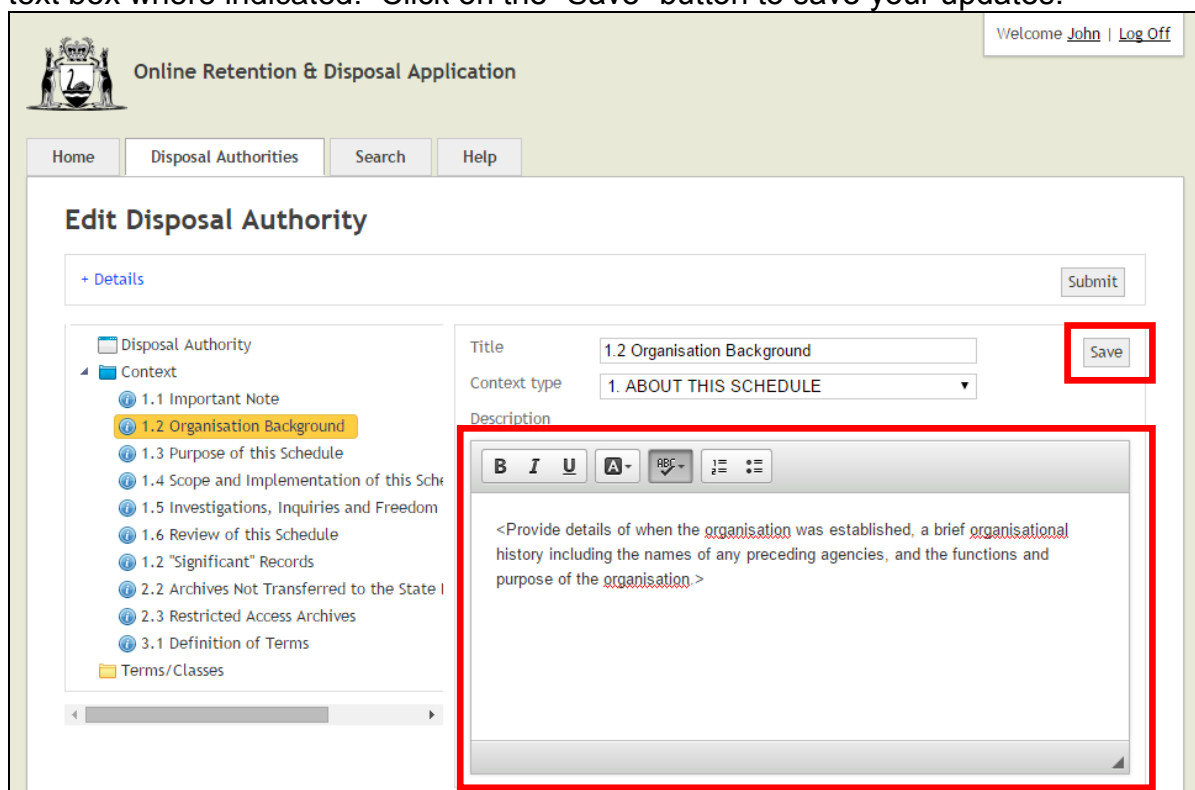
Updating Context

The first part of drafting your disposal authority involves updating the Context (i.e. Introduction) elements.

These elements can be opened by clicking on the ► symbol next to “Context”:

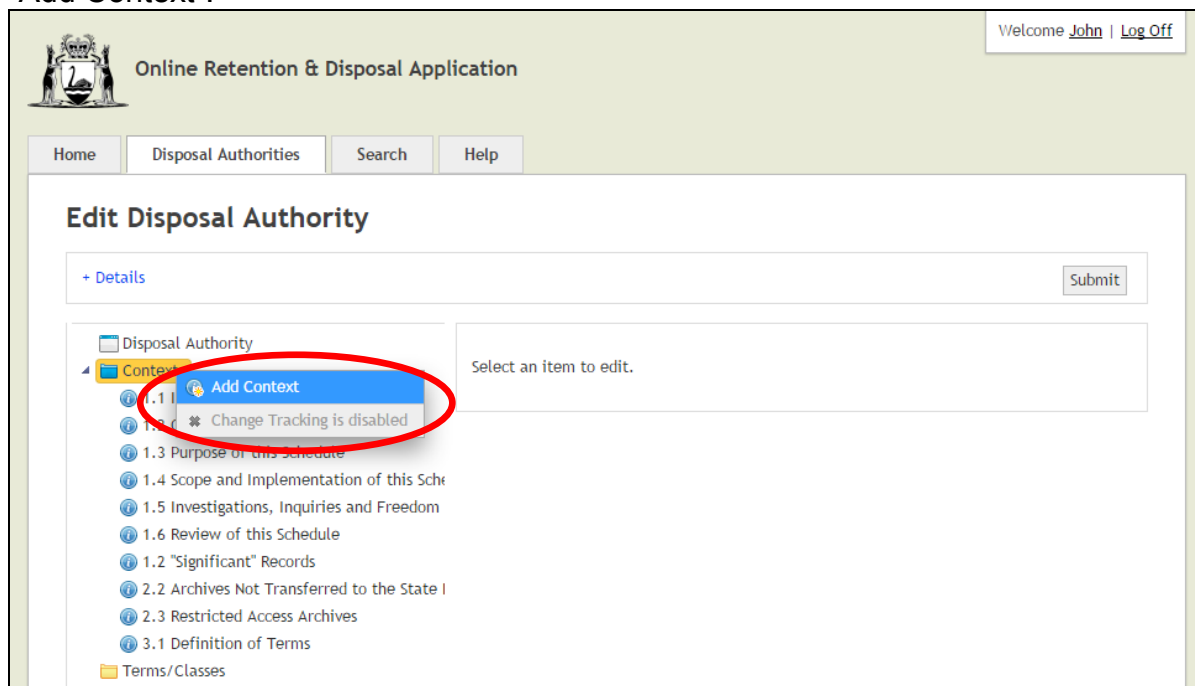


Click on each Context element via the tree menu and update the “Description” in the text box where indicated. Click on the “Save” button to save your updates:



NB: Some of the Context elements contain standard text and will not need updating. If required, you can add new Context elements to provide further background information to your disposal authority (**generally, this will not be required as the existing elements will be sufficient for most authorities**).

To add new Context elements, right-click “Context” in the tree menu and then select “Add Context”:



The new Context element will be placed as the last element in this node (although you can move its position via drag and drop).

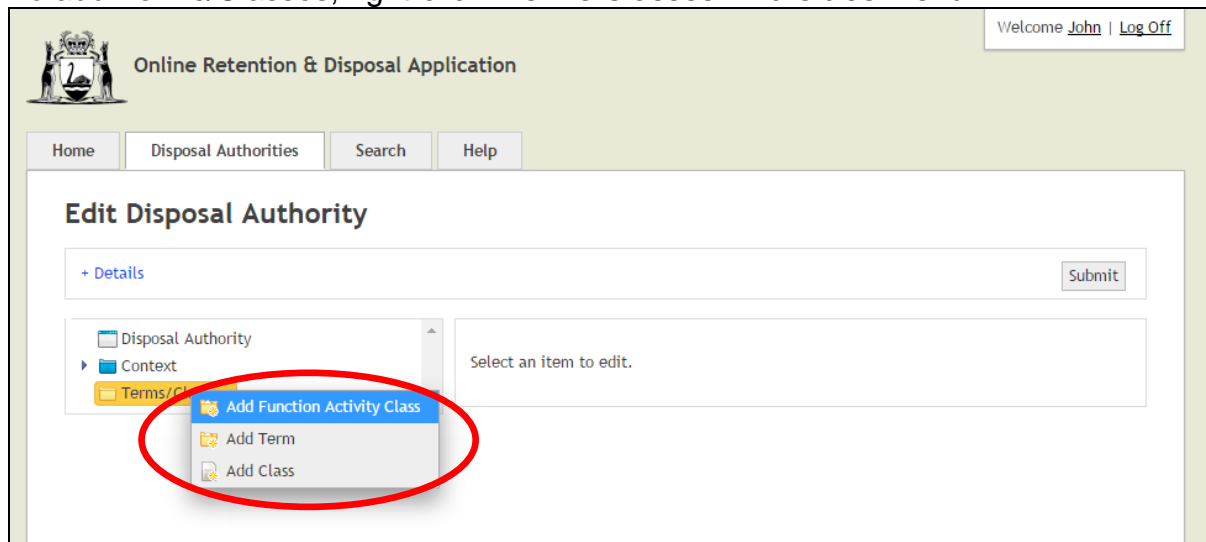
You will need to give the new Context element a title, choose the “Context Type”, complete the “Description” and then click “Save”.

Adding Terms and Classes

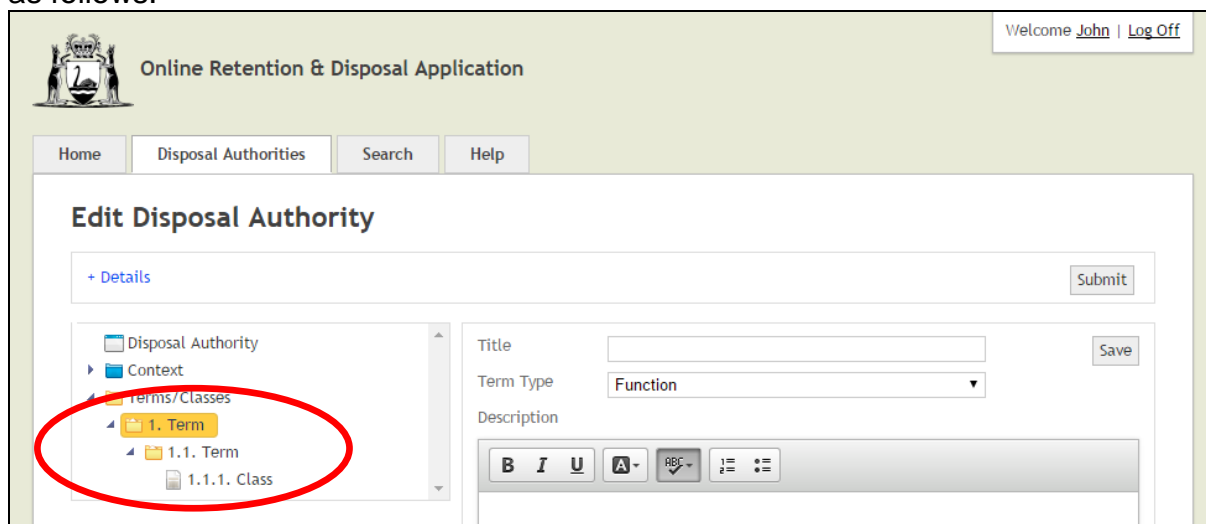
After completing the Context elements, you can now start to build the body of your disposal authority at the Term/Class level.

Add options	Description
<i>Add Function - Activity - Class</i>	Most disposal authorities 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.
<i>Add Term</i>	This option will add a single Term (e.g. a Function, an Activity, etc.) as a first-level term.
<i>Add Class</i>	This option will add a single Class as a first-level class.

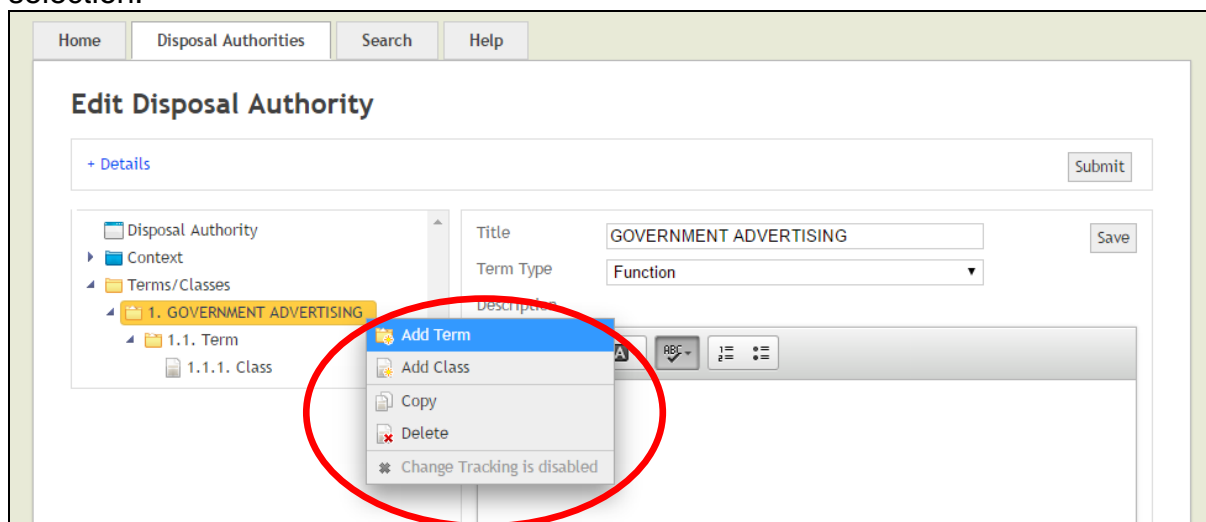
To add Terms/Classes, right-click “Terms/Classes” in the tree menu:



Adding a Function-Activity-Class option will automatically create this nested structure as follows:



Once Terms/Classes are added, Terms/Classes at the ‘same’ level or at 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 the same 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”. **This will however 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 a Term and will automatically re-sequence the numbering order for all Terms/Classes.

In summary, although a three-tier structure of Function-Activity-Class will be the typical structure for a disposal authority, there is flexibility to create other structures when required.

Describing Terms

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

Online Retention & Disposal Application

Welcome John | Log Off

Home Disposal Authorities Search Help

Edit Disposal Authority

+ Details Submit

Disposal Authority

- Context
- Terms/Classes
 - 1. GOVERNMENT ADVERTISING

Title: GOVERNMENT ADVERTISING Save

Term Type: Function

Description

B I U A

The function of central coordination of government advertising including peer reviews of advertising campaigns, central media bookings or advertisements and providing advice and guidance on advertising, media, branding and communications.

"See" Reference Add

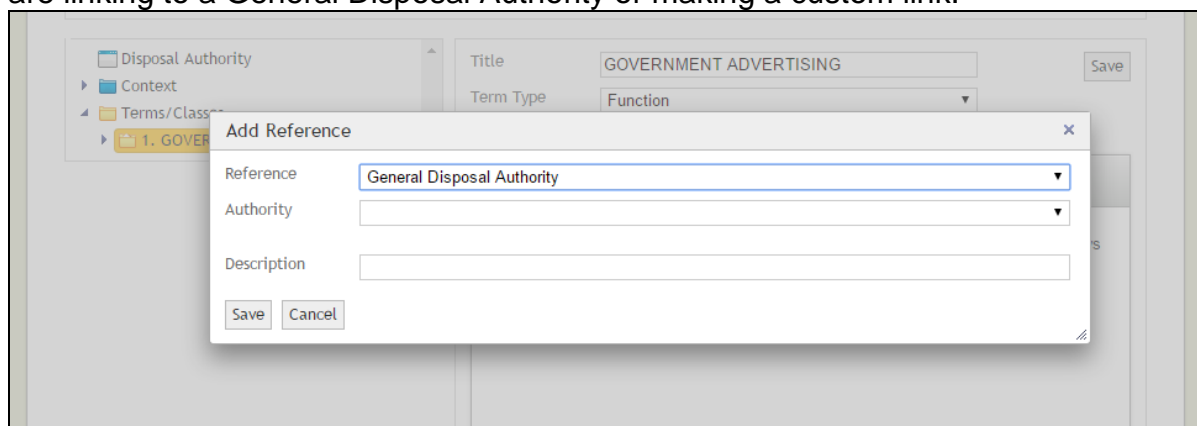
Reference	Authority	Term	Description
No records to display.			

Provide each Term with a title and description. Text in the description can be bolded, italicised, underlined, numbered or dot pointed if required. Text can also be highlighted if needing to draw attention to something for review purposes when the disposal authority is being drafted, although any highlights should be removed when it is being finalised for submission to the State Records Advisory Committee. A spell checker is also enabled.

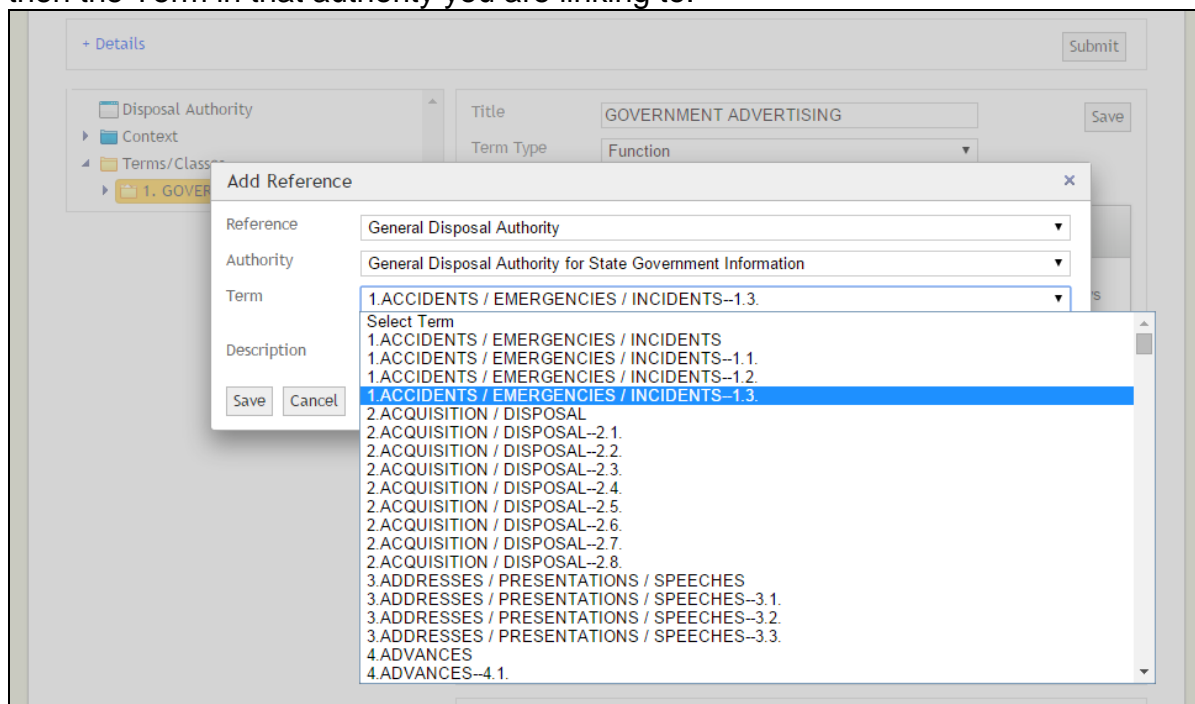
You can use the “See Reference” to provide a cross reference from this term to:

- A Term/Class in the General Disposal Authority for State Government Information produced by the SRO, or
- Another Term/Class elsewhere in the organisation’s disposal authority.

To do this, click “Add” in “See” Reference. You will then need to select whether you are linking to a General Disposal Authority or making a custom link:



When linking to a General Disposal Authority, select the appropriate authority and then the Term in that authority you are linking to:



Once you select save, the cross reference will be captured:

Online Retention & Disposal Application

Welcome John | Log Off

Home Disposal Authorities Search Help

Edit Disposal Authority

+ Details Submit

Disposal Authority

Context

Terms/Classes

1. GOVERNMENT ADVERTISING

Title: GOVERNMENT ADVERTISING Save

Term Type: Function

Description:

B I U

The function of central coordination of government advertising including peer reviews of advertising campaigns, central media bookings or advertisements and providing advice and guidance on advertising, media, branding and communications.

"See" Reference Add

Reference	Authority	Term	Description	
Authority	General Disposal Authority for State Government Information	1.ACCIDENTS / EMERGENCIES / INCIDENTS--1.3.		Edit Delete

When the disposal authority is exported as a Word document this cross reference will appear within the Term description.

Describing Classes and Determining Disposal Decisions

You will need to provide each Class with a description. Providing a title for Classes is optional. Text in the description can be bolded, italicised, underlined, numbered or dot pointed if required (highlighter and spell checker options are also enabled).

Each Class requires a disposal decision, which specifies what will happen to the records.

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

The screenshot shows the 'Edit Disposal Authority' interface. On the left is a tree view with '1.1.1. Class' selected. The main area contains a 'Title' field, a 'Description' field with a rich text editor (containing text about creative briefs and materials), and a 'Disposal' table. The table has columns for 'Action' and 'Custody', and a 'No records to display.' message. An 'Add' button is circled in red in the top right corner of the table area.

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 triggers in the drop down menu or enter your own specific trigger as free text (there is no need to include “after” in this field as the system will insert this automatically).

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

The screenshot shows the 'Add Disposal' dialog box. It has a title bar 'Add Disposal' and a close button. Inside, there is a '+ Disposal Condition' link. Below that are three rows of input fields: 'Retention Period' with a text box containing '5' and a dropdown menu set to 'years'; 'Disposal Trigger' with a dropdown menu set to 'action completed'; and 'Disposal Action' with a dropdown menu set to 'Destroy'. At the bottom, there is a '+ Custom' link and 'Save' and 'Cancel' buttons.

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

The screenshot shows the 'Online Retention & Disposal Application' interface. At the top, there is a navigation bar with 'Home', 'Disposal Authorities', 'Search', and 'Help' buttons. A 'Welcome John | Log Off' link is visible in the top right. The main content area is titled 'Edit Disposal Authority'. On the left, there is a tree view showing the hierarchy: Disposal Authority > Context > Terms/Classes > 1. GOVERNMENT ADVERTISING > 1.1. Term > 1.1.1. Class. The main form area contains a 'Title' field with a 'Save' button. Below it is a 'Description' field with a rich text editor. The description text reads: 'Creative briefs and final creative materials for peer reviewed advertising campaigns, government branding and other communications. Records include:' followed by a bulleted list: 'storyboards', 'scripts', 'artwork', 'press copy', and 'webcopy'. At the bottom, there is a 'Disposal' table with two columns: 'Action' and 'Custody'. The table contains one row: 'Destroy' and 'Retain 5 years after action completed, then Destroy.'. To the right of the table are 'Add', 'Edit', and 'Delete' buttons. The 'Edit' and 'Delete' buttons are circled in red.

Action	Custody
Destroy	Retain 5 years after action completed, then Destroy.

Custom Disposal Decisions

In most cases you will only need to specify the retention period, the disposal trigger and the disposal action. However, customised disposal decisions can be used if required.

Adding a *Disposal condition* allows for disposal decisions to suit specific circumstances. This would occur when there are two (or more) different disposal decisions that apply to the same class of records. This option would however rarely be used. The usual approach which SRO recommends is to provide two (or more) Classes, each with a single disposal decision.

A *Custom* disposal decision can be used in three ways:

Custom options	Description
Transfer	In situations in which records are transferred to a 3 rd party once the retention period has expired, the receiving entity should be stated in the “Transfer To” field. NB: This is NOT to be used when the transfer of State archives will be made to the SRO.
Custom Action	If the records are subject to a disposal action not listed in the main disposal action menu, a customised action can be entered in the “Custom Action” field.
Custom Custody	If the records require a custom custody, this can be stated in the “Custom Custody” field. This would typically be used when records are identified as State archives but which will be retained permanently within the organisation.

Disposal Justifications

The Disposal Justifications table allows information that supports disposal decisions to be provided.

The Archival Justification drop-down list provides criteria against which decisions to archive records can be benchmarked. When a decision is made to archive a class of records, select the appropriate criteria from this drop-down list. You can also choose to add free text to further explain or justify any decision to either destroy or archive classes of records, to note any changes in disposal decisions from a previous schedule, etc.

Optional Elements

Element	Description
"See" Reference	It is possible to add "See" References at the Class level in the same manner as at the Term level. However, this cross referencing is typically conducted at the Term level and is <u>not</u> recommended at the Class level.
Restricted Access Notes	<p>You can state if a restricted access status should apply to any class of records identified as State archives.</p> <p>To enter a restricted access justification, click "Add" in the "Restricted Access Note" table and choose which section of the <i>State Records Act 2000</i> the restriction is being made under. You can enter a free text justification in the "Description" field to further clarify why a restriction should apply. The "Export Restricted Access" report will document all restrictions made.</p>
Links	<p>You can link classes from your organisation's disposal authority to classes of another authority. This is intended to be used when one disposal authority supersedes another and you wish to link the changes in disposal decisions. The "Export Linking" report then provides a table that documents these links.</p> <p>NB: this functionality will not be required until the system is more fully populated with disposal authorities and they become superseded by newer authorities.</p>

Copying / pasting text into Description fields

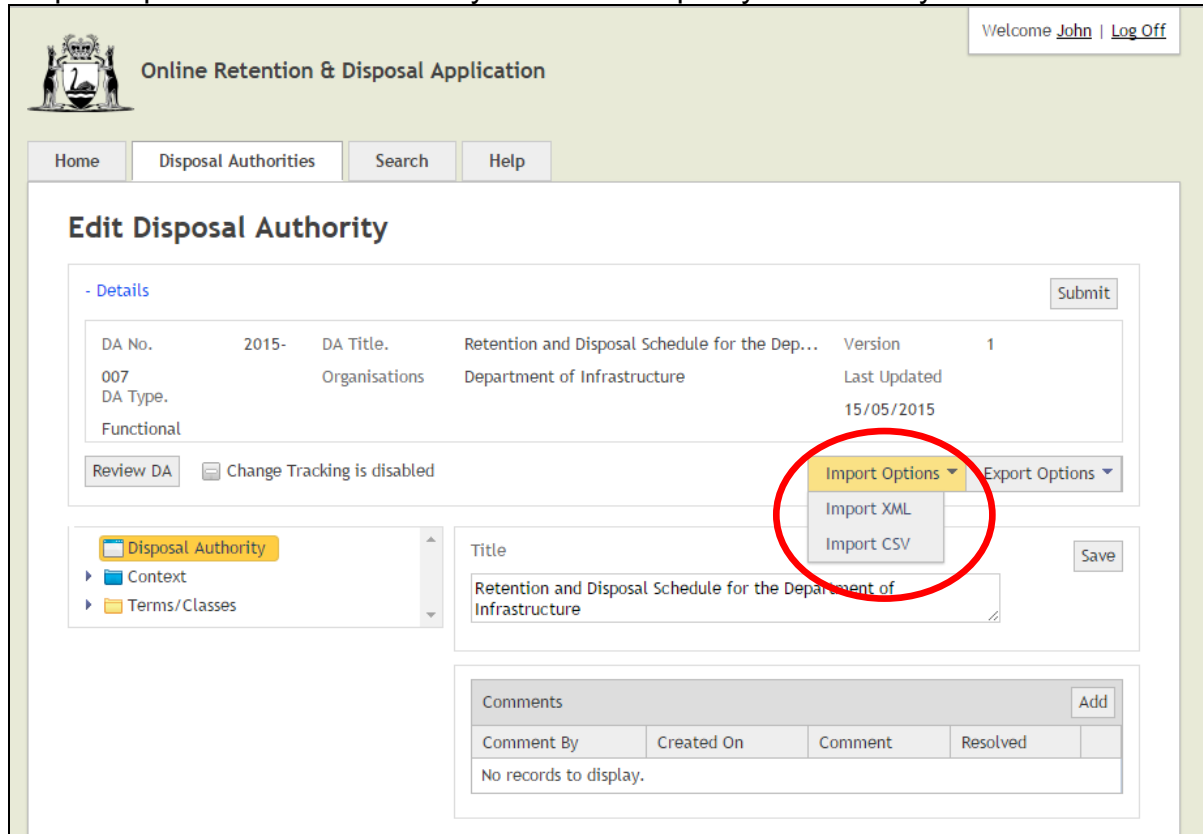
You can copy and paste from existing documentation (e.g. Word or PDF documents) directly into the Description fields in ORDA. Once text has been pasted in, you may need to conduct some further editing in the Description field (e.g. to remove any excess line breaks).

6. Importing your disposal authority

If you have already prepared your disposal authority using desktop or 3rd party software, you can import this into ORDA rather than using the template to manually draft your authority.

You can import your authority in either XML or CSV format.

To conduct an import, navigate to the Edit Disposal Authority screen and click on “Import Options” and select how you want to import your authority:



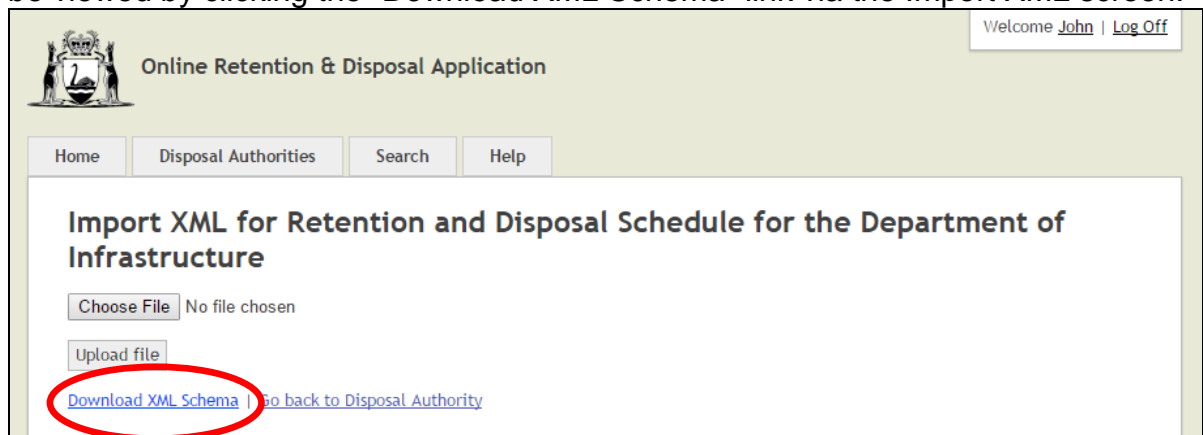
The screenshot shows the 'Edit Disposal Authority' interface. At the top, there is a navigation bar with 'Home', 'Disposal Authorities', 'Search', and 'Help'. Below this, the main content area is titled 'Edit Disposal Authority'. A 'Details' section shows the following information:

DA No.	2015-007	DA Title.	Retention and Disposal Schedule for the Department of Infrastructure	Version	1
DA Type.	Functional	Organisations	Department of Infrastructure	Last Updated	15/05/2015

Below the details, there are buttons for 'Review DA' and 'Change Tracking is disabled'. A sidebar on the left shows a tree view with 'Disposal Authority', 'Context', and 'Terms/Classes'. The main title field contains 'Retention and Disposal Schedule for the Department of Infrastructure'. A red circle highlights the 'Import Options' dropdown menu, which is open to show 'Import XML' and 'Import CSV' options. There is also an 'Export Options' dropdown and a 'Save' button. At the bottom, there is a 'Comments' section with an 'Add' button and a table with columns 'Comment By', 'Created On', 'Comment', and 'Resolved'. The table currently shows 'No records to display.'

XML Import

When importing a XML file, the import must accord with the XML Schema which can be viewed by clicking the “Download XML Schema” link via the Import XML screen:



The screenshot shows the 'Import XML for Retention and Disposal Schedule for the Department of Infrastructure' screen. At the top, there is a navigation bar with 'Home', 'Disposal Authorities', 'Search', and 'Help'. Below this, the main content area is titled 'Import XML for Retention and Disposal Schedule for the Department of Infrastructure'. There is a 'Choose File' button with the text 'No file chosen' and an 'Upload file' button. A red circle highlights the 'Download XML Schema' link, which is followed by a 'Go back to Disposal Authority' link. At the top right, there is a 'Welcome John | Log Off' notification.

To proceed with the import click “Browse” to select the XML file you will be importing and then click “Upload file”.

NB: If your XML import does not accord with the Schema your data may not import correctly.

CSV Import

Alternatively, you can import a disposal authority in CSV format. This is likely to be a better option if you have already prepared your disposal authority in Word or Excel.

When importing a CSV file, the import must accord with the structure of the CSV template which can be viewed by clicking the “Download CSV Template” link via the Import CSV screen:



In importing a CSV file, the following steps are recommended:

- Download the CSV template and save this locally;
- Copy and paste your disposal authority data into the template you have saved;
- Click “Browse” to select your populated CSV file;
- Click “Upload file”.

NB: If your CSV import does not accord with the template your data may not import correctly. The following screen shot shows how you should set out information for you CSV import. You will need to repeat function and activity information in those rows when multiple classes assigned to a single function or activity:

A	B	C	D	E	F	G	H	I	J
Function Title (Term Title)	Function Description (Term Description)	Activity Title (Term Title)	Activity Description (Term Description)	Class Description	Retention Period (Years)	Retention Period (Months)	Disposal Trigger	Disposal Action	
COMMUNITY RELATIONS	The function of establishing rapport with the community and raising and maintaining the organisation's broad public profile. Includes marketing, advertising, media liaison, exhibitions, celebrations, ceremonies, speeches, official representation at functions and participation in community activities. Also includes relationships with professional organisations and industry, the management of customer services, handling reactions to those services, customer consultation and feedback.	Presentations	The activity of delivery presentations and speeches for training, professional, community relations or sales purposes. Includes multimedia presentations.	Addresses and presented by Ministers or senior officers - master copies or transcripts.		5	after last action	Required as state archives	
	The function of establishing rapport with the community and raising and maintaining the organisation's broad public profile. Includes marketing, advertising, media liaison, exhibitions, celebrations, ceremonies, speeches, official representation at functions and								

It is also recommended that you use the **exact** wording for the disposal actions, the options being as follows:

- Destroy
- Required as State archives
- Retain in agency
- Transfer

This will ensure that when the CSV file is imported, the custody statements are correctly expressed.

Unless you are experienced in using XML or have an XML editing tool, importing a disposal authority as a CSV file is likely to be a better option.

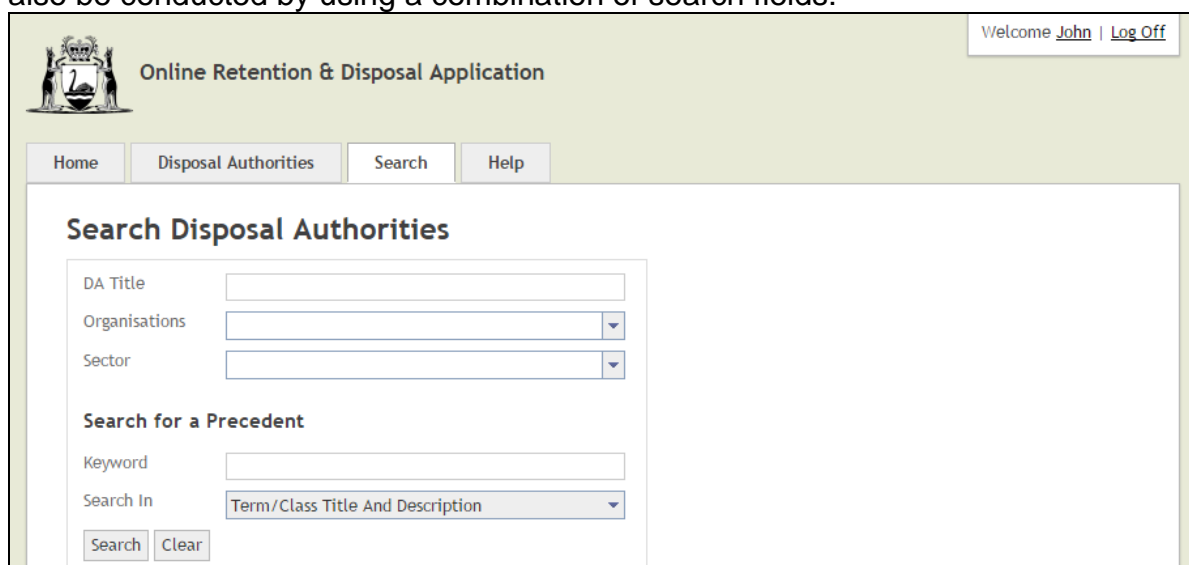
NB: When you conduct an import, this will overwrite any data that is currently at the Term/Class level. Context information will however remain intact.

7. Searching for precedents

To assist informed and consistent decision-making, ORDA can be searched for existing precedents from approved disposal authorities in the system.

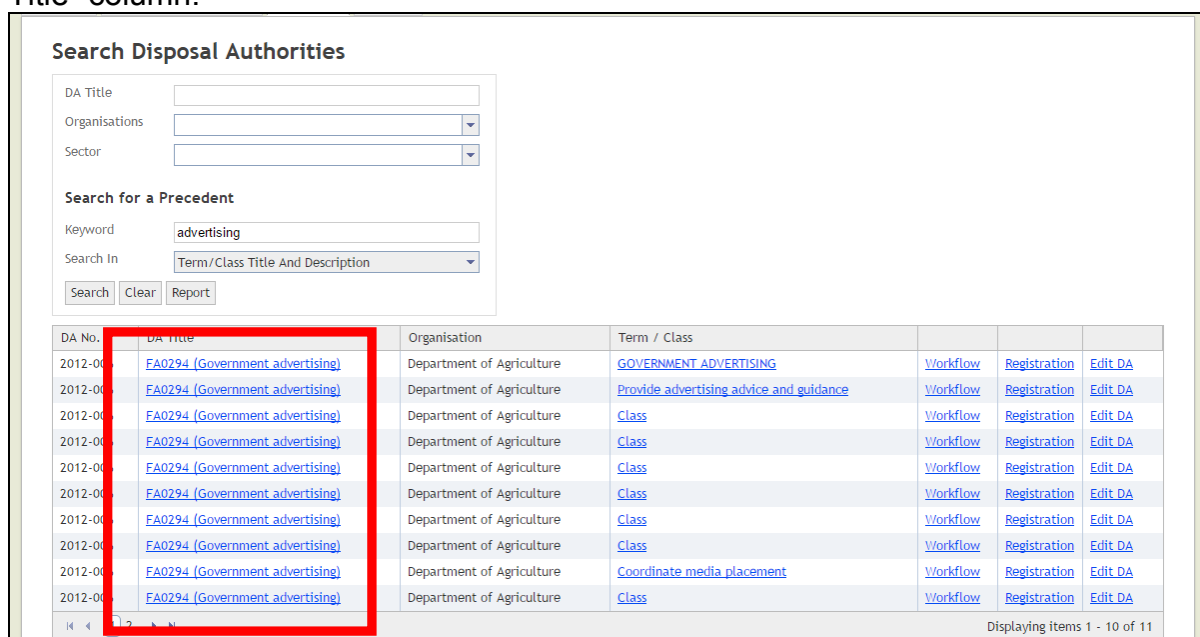
NB: ORDA is being populated progressively as new disposal authorities are developed. More disposal authorities will be searchable across the system over time.

A search can be conducted on specific organisations, government sectors or disposal authorities as well on Terms/Classes across approved authorities. Searching can also be conducted by using a combination of search fields:



The screenshot shows the 'Online Retention & Disposal Application' search interface. At the top right, it says 'Welcome John | Log Off'. Below the header are navigation tabs: 'Home', 'Disposal Authorities', 'Search', and 'Help'. The main section is titled 'Search Disposal Authorities' and contains several search fields: 'DA Title' (text input), 'Organisations' (dropdown menu), 'Sector' (dropdown menu), 'Search for a Precedent' section with 'Keyword' (text input) and 'Search In' (dropdown menu set to 'Term/Class Title And Description'), and 'Search' and 'Clear' buttons.

Search results are presented in several ways. You can view the whole disposal authority in which a matching result has been found by clicking on the link in the “DA Title” column:



The screenshot shows the search results for the keyword 'advertising'. The search filters are: DA Title (empty), Organisations (empty), Sector (empty), Keyword 'advertising', and Search In 'Term/Class Title And Description'. The results are displayed in a table with columns: DA No., DA Title, Organisation, Term / Class, Workflow, Registration, and Edit DA. The DA Title column contains links to 'FA0294 (Government advertising)'. A red box highlights the first row of results.

DA No.	DA Title	Organisation	Term / Class	Workflow	Registration	Edit DA
2012-00	FA0294 (Government advertising)	Department of Agriculture	GOVERNMENT ADVERTISING	Workflow	Registration	Edit DA
2012-00	FA0294 (Government advertising)	Department of Agriculture	Provide advertising advice and guidance	Workflow	Registration	Edit DA
2012-00	FA0294 (Government advertising)	Department of Agriculture	Class	Workflow	Registration	Edit DA
2012-00	FA0294 (Government advertising)	Department of Agriculture	Class	Workflow	Registration	Edit DA
2012-00	FA0294 (Government advertising)	Department of Agriculture	Class	Workflow	Registration	Edit DA
2012-00	FA0294 (Government advertising)	Department of Agriculture	Class	Workflow	Registration	Edit DA
2012-00	FA0294 (Government advertising)	Department of Agriculture	Class	Workflow	Registration	Edit DA
2012-00	FA0294 (Government advertising)	Department of Agriculture	Class	Workflow	Registration	Edit DA
2012-00	FA0294 (Government advertising)	Department of Agriculture	Class	Workflow	Registration	Edit DA
2012-00	FA0294 (Government advertising)	Department of Agriculture	Class	Workflow	Registration	Edit DA
2012-00	FA0294 (Government advertising)	Department of Agriculture	Class	Workflow	Registration	Edit DA

Displaying items 1 - 10 of 11

You can view the specific matching result within the disposal authority by clicking on the link in the “Term/Class” column:

Online Retention & Disposal Application

Welcome John | Log Off

Home Disposal Authorities Search Help

Search Disposal Authorities

DA Title:

Organisations:

Sector:

Search for a Precedent

Keyword:

Search In:

Search Clear Report

DA No.	DA Title	Organisation	Term / Class			
2012-006	FA0294 (Government advertising)	Department of Agriculture	GOVERNMENT ADVERTISING	Workflow	Registration	Edit DA
2012-006	FA0294 (Government advertising)	Department of Agriculture	Provide advertising advice and guidance	Workflow	Registration	Edit DA
2012-006	FA0294 (Government advertising)	Department of Agriculture	Class	Workflow	Registration	Edit DA
2012-006	FA0294 (Government advertising)	Department of Agriculture	Class	Workflow	Registration	Edit DA
2012-006	FA0294 (Government advertising)	Department of Agriculture	Class	Workflow	Registration	Edit DA
2012-006	FA0294 (Government advertising)	Department of Agriculture	Class	Workflow	Registration	Edit DA
2012-006	FA0294 (Government advertising)	Department of Agriculture	Class	Workflow	Registration	Edit DA
2012-006	FA0294 (Government advertising)	Department of Agriculture	Class	Workflow	Registration	Edit DA
2012-006	FA0294 (Government advertising)	Department of Agriculture	Coordinate media placement	Workflow	Registration	Edit DA
2012-006	FA0294 (Government advertising)	Department of Agriculture	Class	Workflow	Registration	Edit DA

Displaying items 1 - 10 of 11

You can view a snapshot of the matching result within the disposal authority by clicking on the link in the “More info” column:

Online Retention & Disposal Application

Welcome John | Log Off

Home Disposal Authorities Search Help

2012-006 : FA0294 (Government advertising)

Department of Agriculture

1. GOVERNMENT ADVERTISING

The function of central coordination of government advertising including peer reviews of advertising campaigns, central media bookings of advertisements and providing advice and guidance on advertising, media, branding and communications.

DA No.	DA Title	Organisation	Term / Class	More info
2012-006	FA0294 (Government advertising)	Department of Agriculture	GOVERNMENT ADVERTISING	More info
2012-006	FA0294 (Government advertising)	Department of Agriculture	Provide advertising advice and guidance	More info
2012-006	FA0294 (Government advertising)	Department of Agriculture	Class	More info
2012-006	FA0294 (Government advertising)	Department of Agriculture	Class	More info
2012-006	FA0294 (Government advertising)	Department of Agriculture	Class	More info
2012-006	FA0294 (Government advertising)	Department of Agriculture	Class	More info
2012-006	FA0294 (Government advertising)	Department of Agriculture	Class	More info
2012-006	FA0294 (Government advertising)	Department of Agriculture	Class	More info
2012-006	FA0294 (Government advertising)	Department of Agriculture	Class	More info
2012-006	FA0294 (Government advertising)	Department of Agriculture	Coordinate media placement	More info
2012-006	FA0294 (Government advertising)	Department of Agriculture	Class	More info

Displaying items 1 - 10 of 11

You can view a consolidated report of matching results by clicking on the “Report” button:

Online Retention & Disposal Application

Welcome John | Log Off

Home Disposal Authorities Search Help

Search Disposal Authorities

DA Title:

Organisations:

Sector:

Search for a Precedent

Keyword:

Search In:

Search

DA No.	DA Title	Organisation	Term / Class			
2012-006	FA0294 (Government advertising)	Department of Agriculture	GOVERNMENT ADVERTISING	Workflow	Registration	Edit DA
2012-006	FA0294 (Government advertising)	Department of Agriculture	Provide advertising advice and guidance	Workflow	Registration	Edit DA
2012-006	FA0294 (Government advertising)	Department of Agriculture	Class	Workflow	Registration	Edit DA
2012-006	FA0294 (Government advertising)	Department of Agriculture	Class	Workflow	Registration	Edit DA
2012-006	FA0294 (Government advertising)	Department of Agriculture	Class	Workflow	Registration	Edit DA
2012-006	FA0294 (Government advertising)	Department of Agriculture	Class	Workflow	Registration	Edit DA
2012-006	FA0294 (Government advertising)	Department of Agriculture	Class	Workflow	Registration	Edit DA
2012-006	FA0294 (Government advertising)	Department of Agriculture	Coordinate media placement	Workflow	Registration	Edit DA
2012-006	FA0294 (Government advertising)	Department of Agriculture	Class	Workflow	Registration	Edit DA

Displaying items 1 - 10 of 11

In this latter example, you can export the report in different formats such as a spreadsheet by clicking on the icon and choosing your preferred format.

This is a recommended option when there is a large number of matching results – the data can then be analysed and refined further via the spreadsheet:

	A	B	C	D	E	F	G	H	I	J	K	L	M
	DA Number	Organisation	Sector	TermRef	TermTitle	TermDescription	ClassDescription	Retention	RetentionF	DisposalTrigger	DisposalAction	Justification	Justific
1	2012-005	Department of Business	1.1	DISPUTE RESOLUTION MANAGEMENT	The function of managing dispute								
2	2012-005	Department of Business	1.1	Dispute cases	The activity of handling dispute	Records relating to		7 years	action completed		Required for state archives		
3	2012-005	Department of Business	1.1	Dispute cases	The activity of handling dispute	Records relating to		7 years	action completed		Destroy		
4	2012-005	Department of Business	1.1	Dispute cases	The activity of handling dispute	Records relating to		2 years	action completed		Destroy		
5	2012-005	Department of Business	1.1	Dispute cases	The activity of handling dispute	Audio recordings of		7 years	action completed		Destroy		
6	2012-005	Department of Business	1.1	Dispute cases	The activity of handling dispute	Records relating to		0 years			Retain in agency		
7	2012-005	Department of Business	1.1	Dispute cases	The activity of handling dispute	Records relating to		7 years	action completed		Destroy		
8	2012-005	Department of Business	1.2	Hearings	The activity of hearing disputes	Published decisions		7 years	action completed		Required for state archives		
9	2012-005	Department of Business	1.2	Hearings	The activity of hearing disputes	Extant hardcopy		7 years	action completed		Required for state archives		
10	2012-005	Department of Business	1.2	Hearings	The activity of hearing disputes	Records relating to		7 years	action completed		Required for state archives		
11	2012-005	Department of Business	1.2	Hearings	The activity of hearing disputes	Records relating to		0 years	superseded		Destroy		
12	2012-006	Department of Business	1	GOVERNMENT ADVERTISING	The function of central coordination								
13	2012-006	Department of Business	1.1	Provide advertising advice and guidance	The activity of providing advice and	Records relating to		5 years	action completed		Destroy		
14	2012-006	Department of Business	1.1	Provide advertising advice and guidance	The activity of providing advice and	Final peer review		5 years			Required for state archives		
15	2012-006	Department of Business	1.1	Provide advertising advice and guidance	The activity of providing advice and	Records relating to		7 years	action completed		Destroy		
16	2012-006	Department of Business	1.1	Provide advertising advice and guidance	The activity of providing advice and	Creative briefs and		5 years			Required for state archives		
17	2012-006	Department of Business	1.1	Provide advertising advice and guidance	The activity of providing advice and	Records relating to		5 years	action completed		Destroy		
18	2012-006	Department of Business	1.1	Provide advertising advice and guidance	The activity of providing advice and	Records relating to		5 years	action completed		Required for state archives		
19	2012-006	Department of Business	1.1	Provide advertising advice and guidance	The activity of providing advice and	Records relating to		5 years	action completed		Destroy		
20	2012-006	Department of Business	1.1	Provide advertising advice and guidance	The activity of providing advice and	Records relating to		5 years			Required for state archives		
21	2012-006	Department of Business	1.2	Coordinate media placement	The activity of coordinating	Records relating to		2 years	action completed		Destroy		
22	2012-006	Department of Business	1.2	Coordinate media placement	The activity of coordinating	Records relating to		2 years	action completed		Destroy		
23	2012-006	Department of Business	2	Government Publishing	The function of publishing and								
24	2012-006	Department of Business	2.1	Publishing agreements	The activity of establishing and	Records relating to					reference use ceased		
25	2012-006	Department of Business	2.2	Publishing	The activity of publishing and	Records relating to					Destroy		
26	2012-006	Department of Business	2.2	Publishing	The activity of publishing and	Master set of proofs		5 years			Required for state archives		
27	2012-006	Department of Business	2.2	Publishing	The activity of publishing and	Master set of proofs		5 years			Required for state archives		
28	2012-006	Department of Business	2.2	Publishing	The activity of publishing and	Master set of proofs		5 years			Required for state archives		
29	2012-006	Department of Business	2.2	Publishing	The activity of publishing and	Records relating to							
30	2012-006	Department of Business	2.3	Provide expertise in publishing	The activity of providing expert	Records relating to		2 years	action completed		Destroy		
31	2012-007	Department of Infrastructure	1	BUS FLEET MANAGEMENT	The function of managing,								
32	2012-007	Department of Infrastructure	1.1	Age and movement	The activity of monitoring and	Records relating to		7 years	disposal of bus		Destroy		
33	2012-007	Department of Infrastructure	1.1	Age and movement	The activity of monitoring and	Records relating to		5 years	last action		Destroy		
34	2012-007	Department of Infrastructure	1.1	Age and movement	The activity of monitoring and	Records relating to		20 years	action completed		Required for state archives		
35	2012-007	Department of Infrastructure	1.2	Compliance	The activity of complying with	Records relating to		7 years	last action		Destroy		
36	2012-007	Department of Infrastructure	1.3	Design	The activity of planning the style,	Final design		2 years			administrative use c		
37	2012-007	Department of Infrastructure	1.3	Design	The activity of planning the style,	Records relating to		5 years			part or equipment is		
38	2012-007	Department of Infrastructure	1.4	Fuel alternatives	The activity of sampling, trialling,	Records relating to		2 years	administrative use c		Required for state archives		

8. Reviewing your disposal authority

You can review your disposal authority by clicking on the “Review DA” button:

This will lead to a screen in which the body of your organisation’s disposal authority will be set out in a single table:

No.	Term Title	Description	Action	Custody	Disposal Justification	Restricted Access	Comments
1.	GOVERNMENT ADVERTISING [Top]	The function of central coordination of government advertising including peer reviews of advertising campaigns, central media bookings or advertisements and providing advice and guidance on advertising, media, branding and communications. See <i>General Disposal Authority for State Government Information 1.ACCIDENTS / EMERGENCIES / INCIDENTS--1.3.</i>					
1.1.							
1.1.1.		Creative briefs and final creative materials for peer reviewed advertising campaigns, government branding and other communications. Records include: <ul style="list-style-type: none"> storyboards, scripts, artwork 	Destroy	Retain 5 years after action completed, then Destroy.			

Any errors in Term/Class descriptions can be amended via this screen by clicking the icon. More substantial editing/correcting will need to be done via the Edit Disposal Authority screen.

There are links back to the relevant sections in the Edit screen in the “No.” column.

9. Adding comments

As you develop your disposal authority you can add comments against specific sections of your authority if you wish to highlight something or seek clarification.

Comments can be added via the Edit screen by selecting the item in the tree menu (left panel) against which you wish to leave a comment and clicking “Add” in the Comments table:

Online Retention & Disposal Application

Welcome John | Log Off

Home Disposal Authorities Search Help

Edit Disposal Authority

+ Details Submit

Disposal Authority

- Context
- Terms/Classes
- 1. GOVERNMENT ADVERTISING**

Title: GOVERNMENT ADVERTISING Save

Term Type: Function

Description:

The function of central coordination of government advertising including peer reviews of advertising campaigns, central media bookings or advertisements and providing advice and guidance on advertising, media, branding and communications.

"See" Reference Add

Reference	Authority	Term	Description
No records to display.			

Comments Add

Comment By	Created On	Comment	Resolved
No records to display.			

A free text field will display in which you can add your comment:

Terms/Classes

1. GOVERNMENT ADVERTISING Description

Add Comment

Comment

Is this an appropriate description for this business function?

Save Cancel

Once you save your comment, this will be captured into the Comments table which will automatically log who added the comment and when. You can edit / delete your comments although you cannot edit / delete comments made by another user or after you have submitted your disposal authority to the SRO.

When a comment is made, a red star will also appear against the commented item in the tree menu as a special alert for commented items:

Edit Disposal Authority

+ Details Submit

Disposal Authority

- Context
- Terms/Classes
 - 1. GOVERNMENT ADVERTISING**

Title: GOVERNMENT ADVERTISING Save

Term Type: Function

Description:

B I U **A** **RBC** **≡** **≡**

The function of central coordination of government advertising including peer reviews of advertising campaigns, central media bookings or advertisements and providing advice and guidance on advertising, media, branding and communications.

"See" Reference Add

Reference	Authority	Term	Description
No records to display.			

Comments Add

Comment By	Created On	Comment	Resolved
John Brown	15/5/2015 3:47 PM	Is this an appropriate description for this business function?	Edit Delete


You can also add comments via the Review screen by clicking on the  icon and adding your comment:

Review Disposal Authority
Retention and Disposal Schedule for the Department of Infrastructure

[Edit Disposal Authority](#)

Table of Contents

[1. GOVERNMENT ADVERTISING](#)

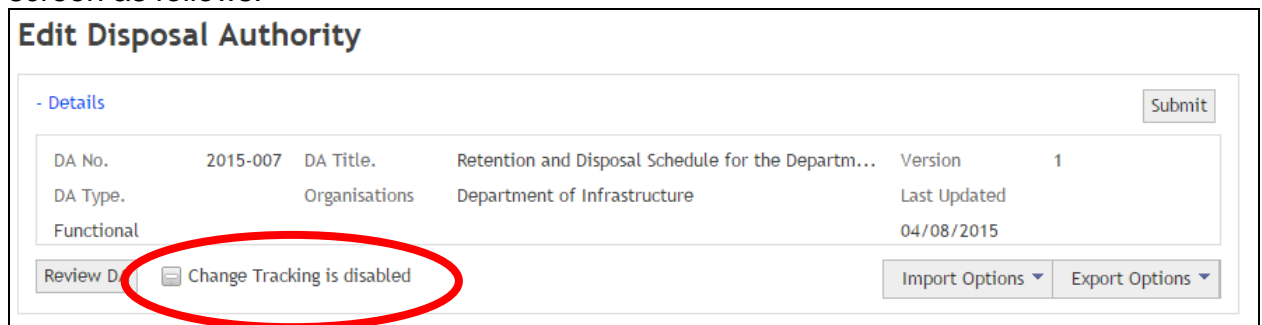
No.	Term Title	Description	Action	Custody	Disposal Justification	Restricted Access	Comments
1.	GOVERNMENT ADVERTISING [Top]	The function of central coordination of government advertising including peer reviews of advertising campaigns, central media bookings or advertisements and providing advice and guidance on advertising, media,					Is this an appropriate description for this business function? <i>John Brown</i> 15/05/2015 

When comments are reviewed by SRO staff and as these matters are resolved, SRO staff will 'untag' the red stars associated with a comment to indicate the matter has been addressed. The comment will remain in the system but the removal of the red star will indicate the matter does not require further attention.

10. Track Changes

ORDA now includes track changes capability. **Please note track changes can only be enabled or disabled for a given disposal authority by the SRO.** Track changes will typically not be used unless circumstances warrant it. If track changes is being used, the SRO officer assigned to your disposal authority will advise you of this.

When track changes is **disabled**, this will be indicated on the Edit Disposal Authority screen as follows:

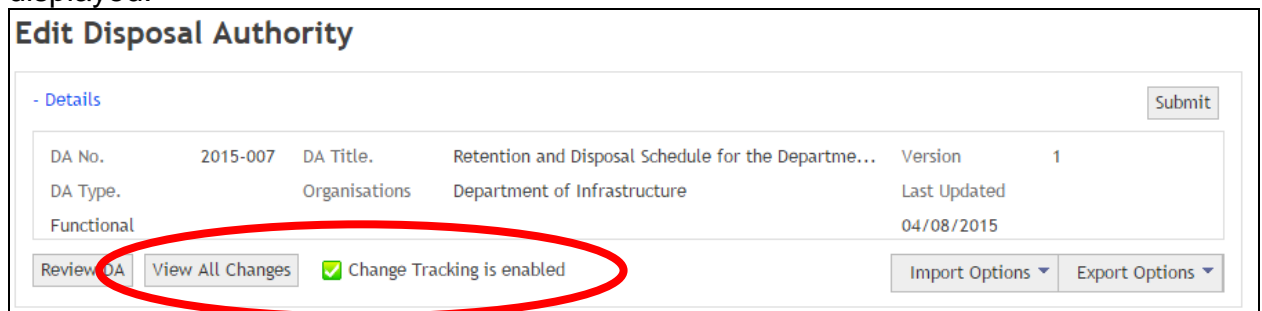


The screenshot shows the 'Edit Disposal Authority' interface. At the top, there is a 'Submit' button. Below it, a table displays details for a disposal authority:

DA No.	2015-007	DA Title.	Retention and Disposal Schedule for the Departm...	Version	1
DA Type.	Organisations	Department of Infrastructure	Last Updated	04/08/2015	
Functional					


Below the table, there is a 'Review DA' button, a checkbox labeled 'Change Tracking is disabled' (which is circled in red), and two buttons: 'Import Options' and 'Export Options'.

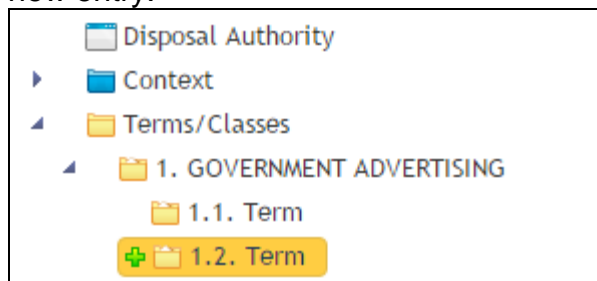
When track changes is **enabled**, this will be indicated on the Edit Disposal Authority screen as follows. An additional button that allows you to view all changes will also be displayed:




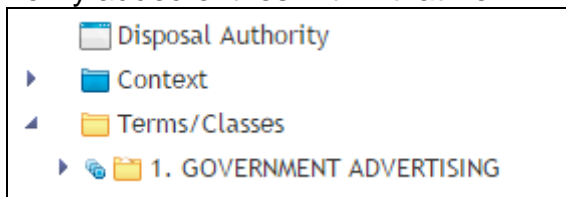
The screenshot shows the 'Edit Disposal Authority' interface, similar to the previous one. The table details are the same. In this version, the 'Change Tracking is enabled' checkbox is checked and circled in red. Additionally, a 'View All Changes' button is visible next to the 'Review DA' button.


When track changes is enabled and changes are then made to the disposal authority, tree menu will display icons which indicate a change has been made and where this change is. The following section provides an overview of these icons for different changes made to a disposal authority.

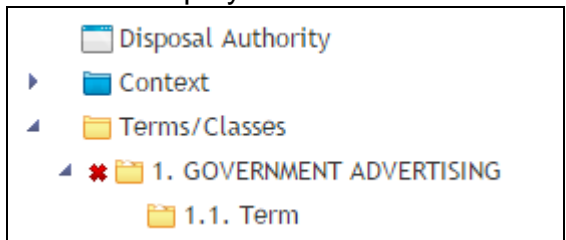
When a Term or Class is **added**, the  icon will display on the tree menu against the new entry:




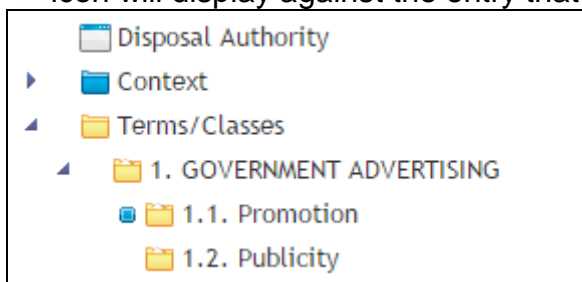
When the tree menu is **compressed**, the  icon will display to indicate there are newly added entries within that Term:





When a second level (e.g. Activity) Term, or Class, is **deleted** the next higher level Term will display the  icon:



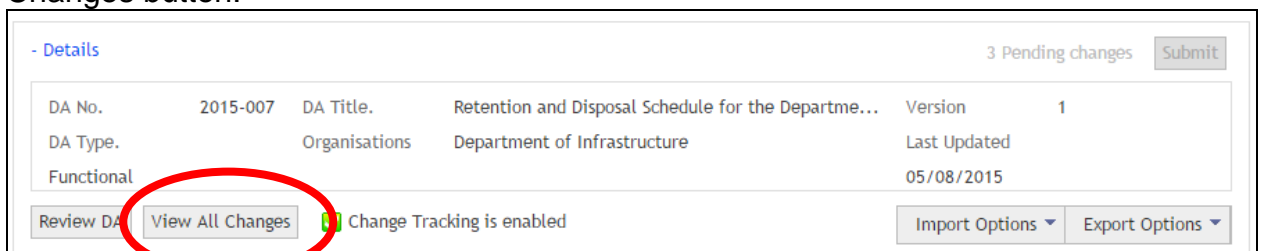
When a Term or Class is **changed**, such as the Description being updated, the  icon will display against the entry that has changed:



When a Term or Class is moved within the tree structure, the  or  icons will display to indicate that a change has occurred and the direction of the change:



To view all track changes before they have been accepted, click on the View All Changes button:



All track changes will then display in a table as follows. The Key legend on the right side of the screen provides clarification on what in the disposal authority has changed (i.e. modification, addition or deletion):

Online Retention & Disposal Application

Welcome John | Log Off

Home Disposal Authorities Search Help

View Changes

Retention and Disposal Schedule for the Department of Infrastructure

Edit Disposal Authority Export to Word Accept All Changes Reject All Changes

Context

Terms / Classes

1.1. Publicity

Changes		
Change	Detail	
Changed Description	Here is some next text.	Accept Reject
Moved	▲ This node was moved up by 1	Accept Reject

1.2. Promotion

Changes		
Change	Detail	
Moved	▼ This node was moved down by 1	Accept Reject

Key:

- Aa Modified
- Aa Added
- Aa Removed
- 1 x Changed
- 0 x Added
- 0 x Removed
- 2 x Moved

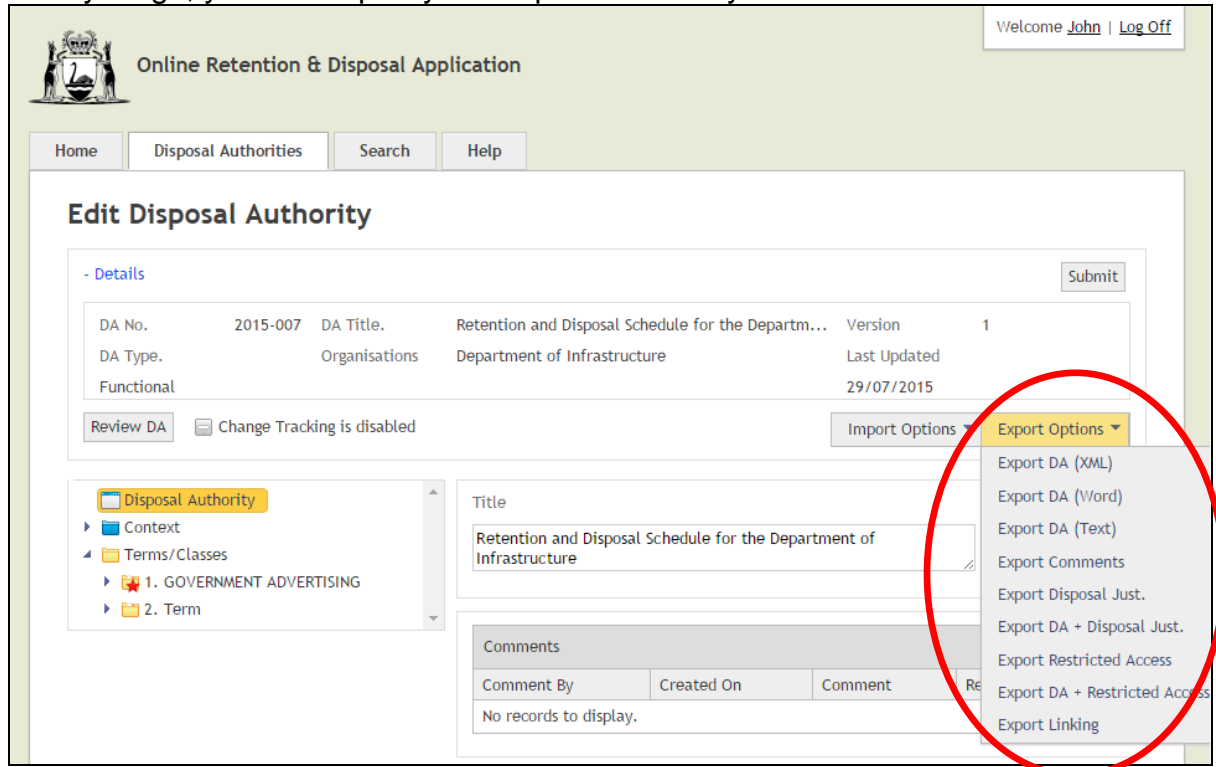
A report of these track changes can also be exported as a Word document.

Changes can be accepted or rejected, either individually or as a whole.

As mentioned, track changes will rarely be enabled but can be useful in the later stages of some disposal authorities when final changes are required to be made and for those changes to be easily identifiable.

11. Exporting your disposal authority

At any stage, you can export your disposal authority in various formats:



You can do this via the Edit screen by clicking the “Export Options” button and then selecting the format / report you want to export.

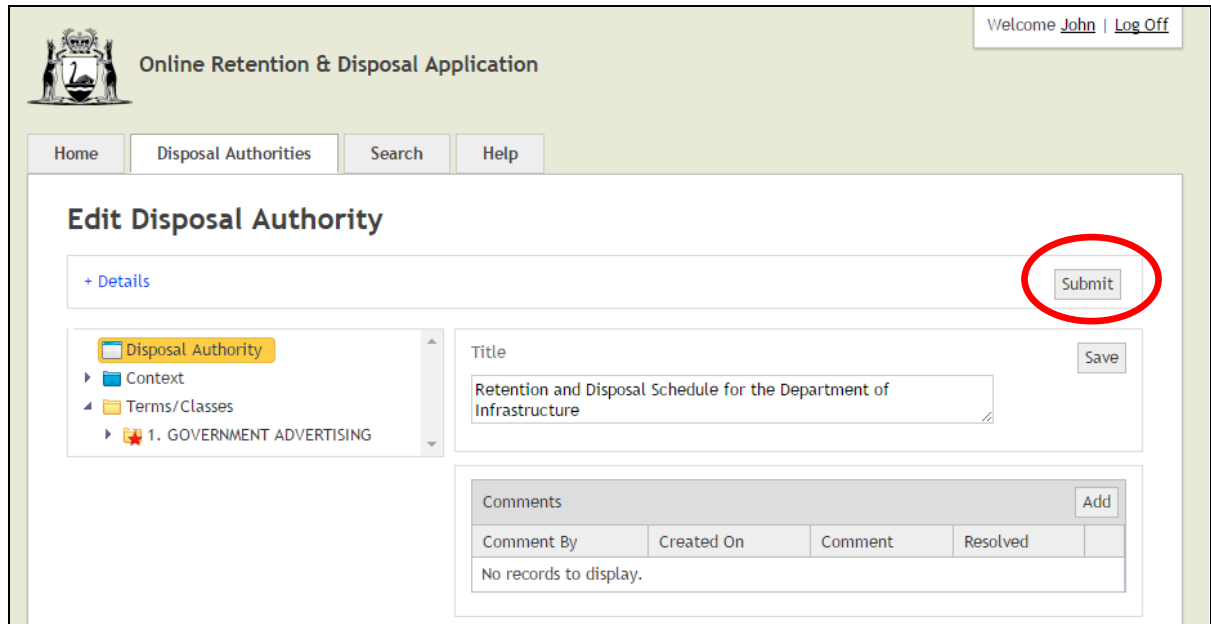
Selecting the “Export DA (Word)” option will produce your disposal authority with the traditional look.

Options are also available for exporting:

- Your disposal authority in xml;
- Your disposal authority as a .txt file which can then be opened as a spreadsheet;
- All comments made against your disposal authority (including who has made each comment, the date/time comments were made and the disposal authority version comments were made against);
- All Disposal Justifications as a summary report;
- Your disposal authority with Disposal Justifications included;
- All Restricted Access decisions as a summary report;
- Your disposal authority with Restricted Access decisions included;
- A Linking Table report which cross references entries from a superseded disposal authority to a new authority (when such linking has been made).

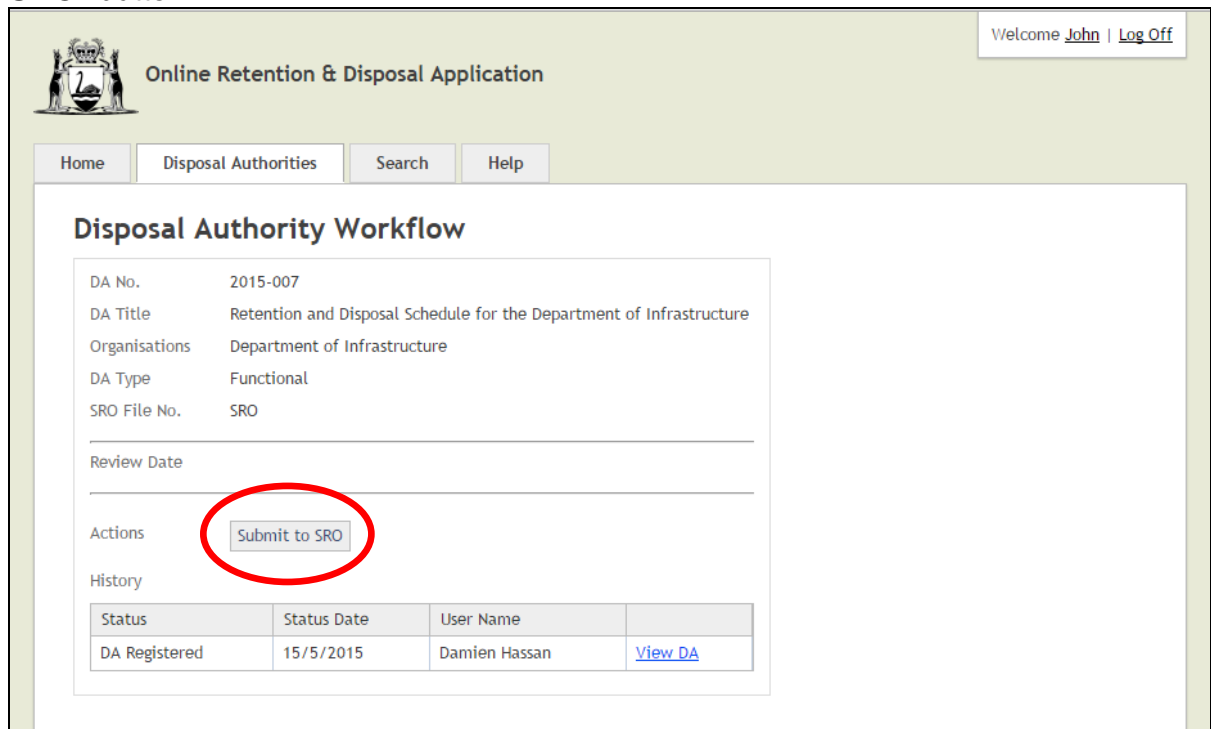
12. Submitting your disposal authority

Once you have completed drafting your disposal authority and you are ready to submit it to the SRO for review, navigate to the Edit screen and click the “Submit” button:



The screenshot shows the 'Edit Disposal Authority' interface. At the top, there is a navigation bar with 'Home', 'Disposal Authorities', 'Search', and 'Help'. The main content area is titled 'Edit Disposal Authority' and includes a '+ Details' link. A sidebar on the left shows a tree view with 'Disposal Authority' selected, containing 'Context', 'Terms/Classes', and '1. GOVERNMENT ADVERTISING'. The main form has a 'Title' field with the text 'Retention and Disposal Schedule for the Department of Infrastructure' and a 'Save' button. Below this is a 'Comments' section with an 'Add' button and a table with columns 'Comment By', 'Created On', 'Comment', and 'Resolved'. The table currently shows 'No records to display.' A red circle highlights the 'Submit' button in the top right corner of the form area.

This will take you to the Disposal Authority Workflow screen. Click the “Submit to SRO” button:



The screenshot shows the 'Disposal Authority Workflow' interface. At the top, there is a navigation bar with 'Home', 'Disposal Authorities', 'Search', and 'Help'. The main content area is titled 'Disposal Authority Workflow' and displays the following information:

- DA No. 2015-007
- DA Title Retention and Disposal Schedule for the Department of Infrastructure
- Organisations Department of Infrastructure
- DA Type Functional
- SRO File No. SRO

Below this information is a 'Review Date' field and an 'Actions' section containing a 'Submit to SRO' button, which is circled in red. At the bottom, there is a 'History' section with a table:

Status	Status Date	User Name	
DA Registered	15/5/2015	Damien Hassan	View DA

Once this has been done, your disposal authority has been submitted to the SRO for review. The system will send you an email notification confirming this.

The SRO officer assigned to your disposal authority will conduct their review. While this process is being undertaken, you will not be able to make any updates to your disposal authority.

As the SRO conducts its review, the SRO officer will add comments to any items that need further clarification or amendment. These will be marked up against your disposal authority (as the next version).

When the SRO review has been completed you will receive an email notification informing you of such. You can then log back into the system to access your reviewed disposal authority.

In making further amendments to your disposal authority, you need only focus on those items that are identified with a red star. The red stars identify where the SRO has made comments and where something in the Term/Class will need further clarification or amendment.

In providing clarification, you can also add your own comments.

When you have addressed all matters that the SRO has commented on, either by amending the sections as appropriate or by providing additional clarification, you can submit your disposal authority again in the same way as you did previously.

Some disposal authorities may need to go through several iterations to reach a stage of finalisation, but often just one stage of revision is required.

Once the SRO is satisfied that the disposal authority is ready to be submitted to the State Records Advisory Committee (SRAC) for independent review, the SRO will progress this through the system's workflow and you will receive a notification of such.

If the SRAC requests that further changes be made to the authority, the SRO will identify these sections via ORDA and you will receive a further email notification to log into the system and address these items. Again, such items will be identified with a red star so you only need focus on these. After amending your authority, you will need to submit it as per above.

Upon SRAC endorsement, the next stage in the workflow is for your disposal authority to be submitted to the State Records Commission for approval. Once approved, the SRO will write to your organisation confirming that your disposal authority has received legal sanction.

Typically, once your disposal authority is approved by the State Records Commission, your access to ORDA will be deactivated.

When it comes time for your disposal authority to be reviewed (within 5 years of the date of approval) there will be an option to use the existing disposal authority within ORDA as the basis to make further amendments if required OR to use a blank template.

13. Troubleshooting

Should you experience any difficulties accessing or using ORDA at any stage, please contact the SRO officer assigned to your disposal authority.