

# **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.

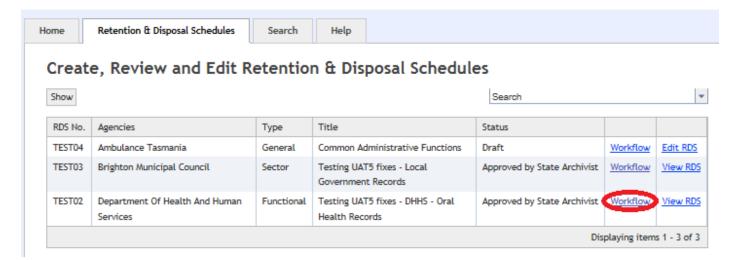
Through ORDA, you can draft or import your disposal schedule, export your disposal schedule in different formats, and search across other approved disposal schedules for existing precedents. The Government Information Strategy Unit (GISU) within the Tasmanian Archive + Heritage Office (TAHO) will review 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:





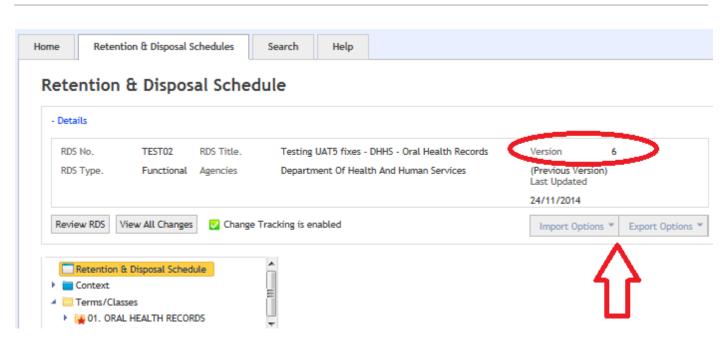
This takes you to the Workflow screen, where you can view the stages that the schedule has passed through:

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 RD.		
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		
GISM 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		

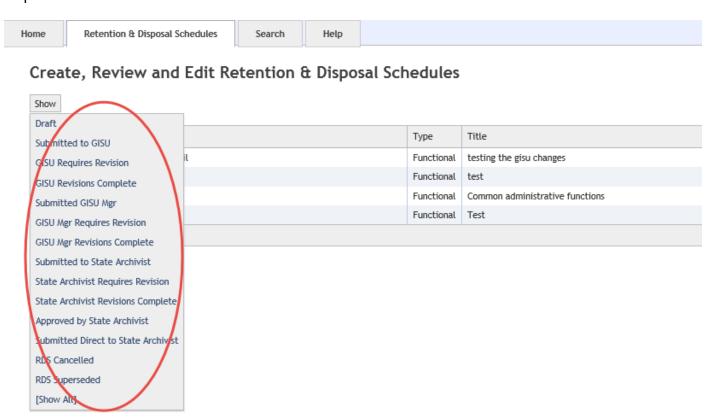
In the above example (a schedule that has already been authorised by the State Archivist) you can clearly see the stages that the workflow has passed through before being authorised.

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	<u>View RDS</u>
RDS Submitted to State Archivist	26/8/2015	Allegra Huxtable	View RDS
RDS Submitted to State Archivist	26/8/2015	Allegra Huxtable	<u>View RDS</u>
RDS Submitted to GISU Manager	26/8/2015	Sam Foster-Davies	<u>View RDS</u>
GISU Revisions Complete	26/8/2015	Samantha Foster-Davies	View RDS
GISU Revisions Issued to Agency	26/8/2015	Sam Foster-Davies	<u>View RDS</u>
RDS Submitted for GISU Review	25/8/2015	Samantha Foster-Davies	<u>View RDS</u>
RDS Registered	25/8/2015	Sam Foster-Davies	<u>View RDS</u>

Clicking on the <u>View RDS</u> 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).



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:



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 <a href="http://www.linc.tas.gov.au/global/govtrecordkeeping/services/trainingevents/training">http://www.linc.tas.gov.au/global/govtrecordkeeping/services/trainingevents/training</a>

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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



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1	<ul> <li>ORDA Admin creates agency/users and Disposal Schedule registration, and assigns [GISU reviewer] and [A</li> <li>ORDA notification email received by [GISU reviewer] – advising they are the officer assigned as GISU reviewer</li> </ul>				
	ORDA notification email received by [Agency editor] providing hyperlink to access ORDA, set password a	and commence drafting.			
2	<ul> <li>[Agency editor] imports/manually completes drafting. The [Agency editor] must 'View all Changes' and 'A</li> <li>To advance the workflow, the Agency editor selects the 'submit' button on the Edit RDS screen. This oper</li> </ul>				
	ORDA notification email received by [GISU reviewer] – advising [name] schedule submitted by [agency edited by [agen	itor].			
3	• [GISU reviewer] logs in ORDA and selects relevant RDS from Retention & Disposal Schedule table, by sele	ecting " <u>edit RDS</u> " link, and reviews schedule, adding comment	cs as required.		
4	To advance the workflow, the GISU reviewer must return to ORDA's Retention and Disposal Schedule management	ain tab, and select the "Workflow" link against the relevant so	chedule. There are two options:		
5	(a) If GISU Require Revisions button is selected:	evisions button is selected:  (b) If Submit to GISU Mgr button is selected:			
	<ul> <li>ORDA notification email received by [agency editor].</li> <li>Agency editor responds to comments/additional development undertaken, and resubmits to GISU</li> <li>ORDA notification email received by [GISU reviewer] – advising [name] schedule submitted by [agency</li> </ul>	<ul> <li>ORDA notification email received by GISU Manager advising review to be undertaken of [name] schedule.</li> <li>GISU Manager logs into ORDA and selects relevant RDS to review, by selecting "edit RDS" link.</li> <li>GISU Manager undertakes review.</li> </ul>			
	<ul> <li>editor].</li> <li>[GISU reviewer] logs in to ORDA and selects "edit RDS" link of relevant schedule, and undertakes additional review.</li> </ul>	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:			
	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:				
6	(a) If GISU Require Revisions button is selected [go to step 5 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:	(d) If <b>Submit to State Archivist</b> button is selected:		
		ORDA notification email received by [GISU reviewer]  When review is completed, to advance the workflow, the	<ul> <li>ORDA notification email received by State Archivist advising review to be undertaken of [name] schedule.</li> <li>Notification email that the schedule has been submitted to the State Archivist is simultaneously sent to the Agency Editor.</li> <li>State Archivist logs in and reviews schedule.</li> <li>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:</li> </ul>		
		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:			
		<ul> <li>(a) Return to agency for additional development [repeat step 5 (a)] OR</li> <li>(b) Make (minor) corrections and re-submit to GISU Mgr</li> </ul>	and relevante semestation fine to all o time options.		
		<ul> <li>[repeat step 5 (b)] <u>OR</u></li> <li>(c) Make (minor) corrections and submit direct to State Archivist for final review/endorsement [go to step 6 (d)]</li> </ul>			
7			If State Archivist requires revision button is selected:	If State Archivist Approves button selected:	
			ORDA notification email received by [GISU reviewer]	Notification email sent to     [Agency editor] and cc GISU	
			To advance the workflow, the GISU reviewer selects from one of three options:	reviewer approving schedule.	
			<ul> <li>Return to agency for additional development [repeat step 5 (a)] OR</li> <li>Make (minor) corrections and re-submit to GISU Mgr [repeat step 5 (b)] OR</li> <li>Make (minor) corrections and submit direct to State Archivist for final review/endorsement [repeat step 6 (d)]</li> </ul>		

