A Short Guide to using the Online Retention and Disposal Application (ORDA)

This guide is intended to provide new users of ORDA with a quick overview for using the system.

For further information about using ORDA, including advanced functions, searching precedents and importing a disposal authority, please refer to the detailed User Manual available on the State Records Office (SRO) website.

What is ORDA?

ORDA is a secure, web-based system that allows you to draft and submit your organisation's disposal authority (e.g. Retention and Disposal Schedule) to the SRO. SRO staff use ORDA to review your authority and provide comments back to you via the system. ORDA manages the full workflow for disposal authority development: from initial preparation to final approval by the State Records Commission.

Getting started

Please contact the SRO <u>before</u> you commence preparing your organisation's disposal authority. The SRO will establish your access to ORDA. Once registered, you will receive an email notification containing a link to ORDA which lets you activate your user account and start drafting your disposal authority through the template provided.

The website address for ORDA is: https://orda.sro.wa.gov.au. To log into ORDA, click on "Client Log On" and enter your user name and password. Once you are logged in, click the "Edit DA" link to start preparing / editing your disposal authority. You can continue to access the system for the time it takes for your disposal authority to receive approval from the State Records Commission.

Preparing your disposal authority

Your disposal authority can be drafted via the "Edit Disposal Authority" screen. Basic information for your disposal authority will be pre-populated already. For example, by clicking on the small arrow (▸) next to "Context" in the left menu, this will open all the elements of the Introduction to your authority (see Figure 1). You will need to click on each of these elements (e.g. "Organisation Background") to update details in the Description field, where identified.

Figure 1: Context elements displayed

"Terms/Classes" in the left panel menu is where you will build the body of your disposal authority. By right-clicking on "Terms/Classes, you will be provided options to "Add Function Activity Class", "Add Term" or "Add Class" (see Figure 2). Although the Function-Activity-Class structure is the standard approach and will be most often used, you have the option of building other classification structures that meet your organisation's need.

Figure 2: Right-clicking "Terms/Classes" allows new elements to be added
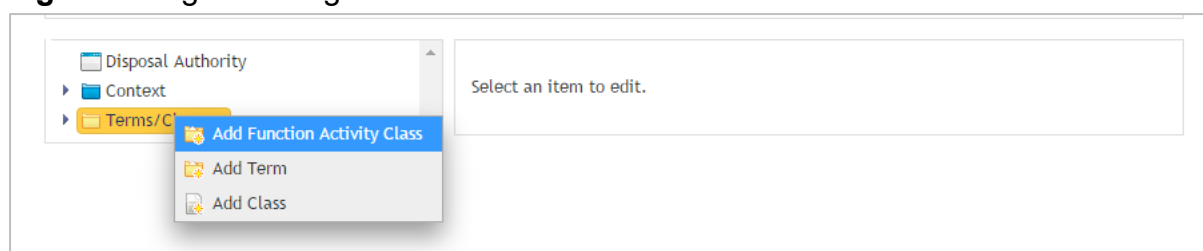
Once you start adding in terms and classes, you will need to add titles for terms (e.g. the title of the function/activity that is being described) as well as descriptions for both terms and classes (e.g. a description of functions, activities and record classes). You can add **_rich text_** elements (e.g. bold, italicise, etc.) to text in the Description field (see Figure 3).

Figure 3: An activity description with rich text added

You can add additional terms and classes <u>within</u> an existing term by right-clicking that term and selecting the appropriate option (see Figure 4). In this manner, you

can add different activities for a given function, or different classes for a given activity, etc.

Figure 4: Adding terms or classes <u>within</u> an existing term
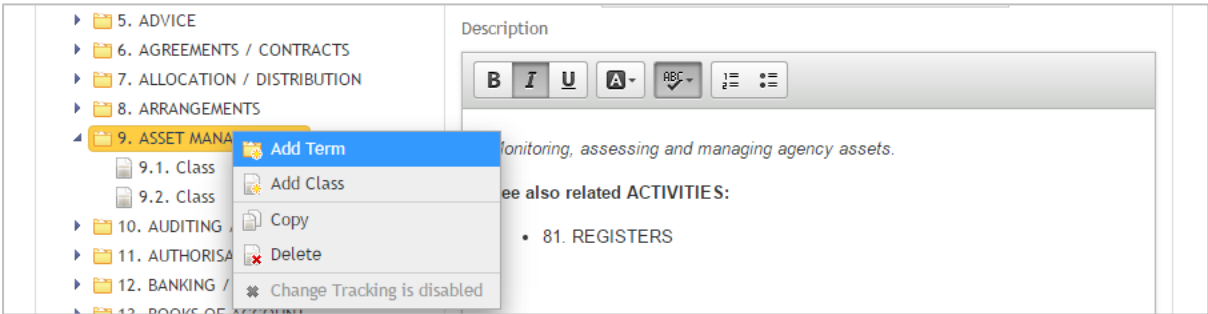
For each class, you will also need to add a disposal statement to identify the retention period and disposal action for those sets of records (see Figure 5).

Figure 5: Adding a retention period, disposal trigger and disposal action for a class
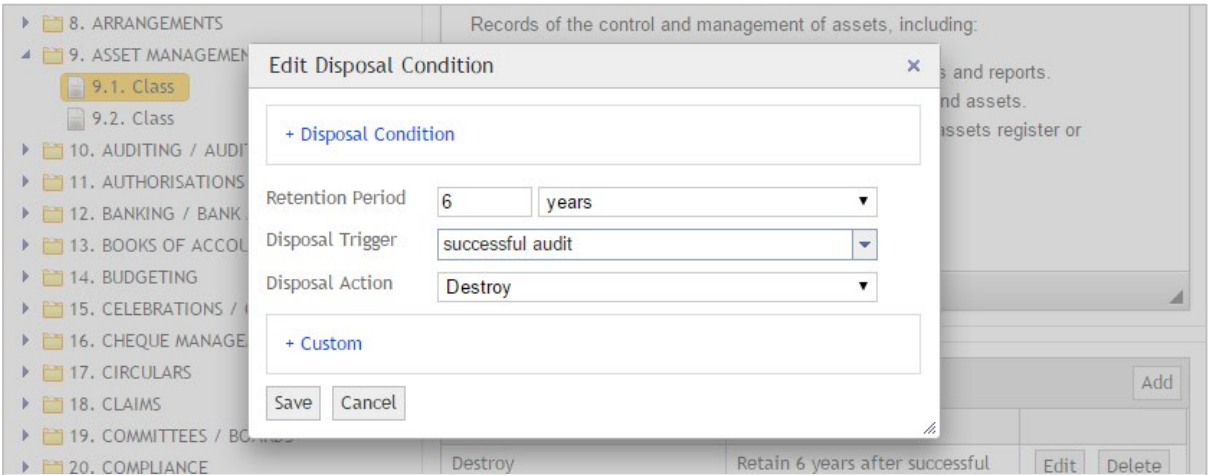
In this manner, you can prepare your complete disposal authority via ORDA. You can export a copy of the authority at any stage as a Word document, or in other formats, by selecting the Export option (see Figure 6).

Figure 6: Exporting a disposal authority as a Word document
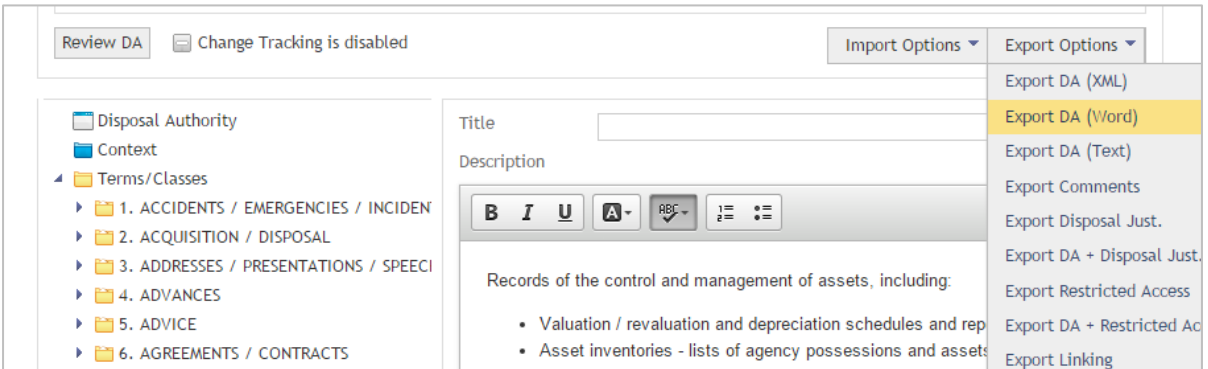
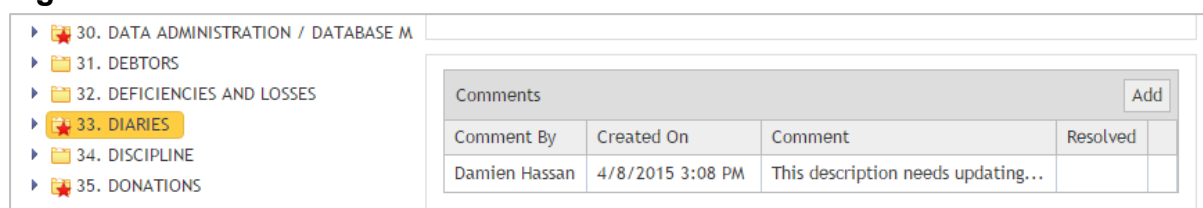You can also review your disposal authority in a table view by selecting the "Review DA" option. Via the Review screen, you can make basic edits to the term/class descriptions.

Submitting your disposal authority

When you have finished drafting your disposal authority and have completed any internal approval processes within your organisation, click the "Submit" option on the "Edit Disposal Authority" screen. This will take you to the "Disposal Authority Workflow" screen. Click "Submit to SRO" - this will notify the SRO officer assigned to your disposal authority that the SRO can commence its review. Once you have submitted your disposal authority to the SRO, you will not be able to edit it further unless the SRO 'returns' the authority to you for further amendment.

As the SRO officer reviews your disposal authority, comments against the authority will be added where matters need clarification or amendment. Once the SRO review is complete and if further matters need to be addressed, you will receive an email notification advising you of this. You will then need to log into ORDA to see what matters need addressing. Any such matters will be clearly identified against the relevant terms/classes via red stars (see Figure 8).

Figure 8: SRO comments identified with red stars

Once all matters identified by the SRO have been addressed, you will need to submit your disposal authority back to the SRO in the same way as outlined above. Once the SRO is satisfied with the disposal authority, the SRO will submit it to the State Records Advisory Committee for further review, and ultimately the State Records Commission for final approval. The SRO officer assigned to your disposal authority will advise you of progress through endorsement / approval processes. A final copy of your disposal authority can be exported from ORDA once it has been approved by the State Records Commission.

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

Contact details: sro@sro.wa.gov.au

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