

# ORDA Agency User Guide 5

## Creating/Editing Terms, and Classes

When accessing an RDA the screen will initially display the details panel, and in a panel on the left hand side the RDA Tree menu (table of content). The example below displays only the highest level as this is a new blank RDA and no Terms/Classes have yet been added.

### Edit Retention & Disposal Authority

- Details Submit

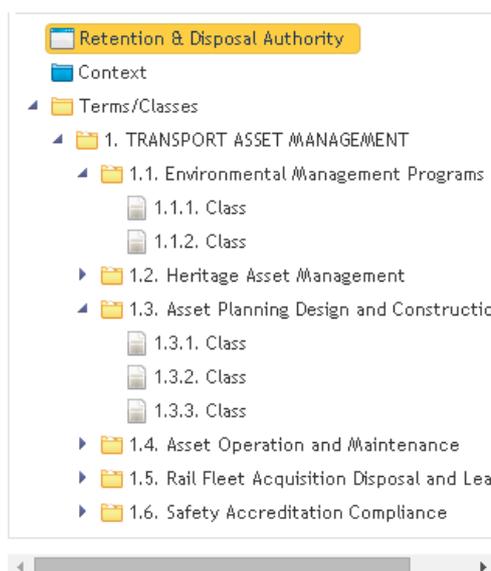
RDA No.	Draft Test	RDA Title.	Blank RDA registration - Test	Version	1
RDA Registration		Agencies	Department of Transport II	Last Updated	26/03/2015
RDA Type.	Function				
Specific					

Change Tracking is enabled

- Retention & Disposal Authority
- Context
- Terms/Classes

## 1.1 Tree Menu (table of contents)

Once content has been added to the RDA the tree menu can be expanded to display Terms/Classes. The example below has been expanded to show down to Class level for some Activities.

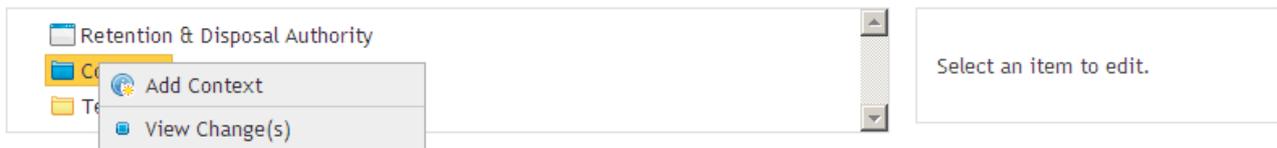


## 1.2 Definitions

Item	Description
Retention & Disposal Authority	Title of the RDA.
Context	Background information about the RDA. It is possible to add additional elements if required.
Terms/Classes	The main body of the RDA is nested below this heading.
Function	Functions are nested immediately below the Terms/Classes heading. A function is a major responsibility that is managed by the agency to fulfil its objectives. A function may be a high level aggregate of the agency's activities
Activity	Activities (where they are used) are nested below Functions. Activities are the major processes performed by an agency to accomplish its functions.
Class	Class entries may be nested below either a function or activity. Each class entry is for a group of related records produced by the same activity and/or function, and which require the same disposal action.

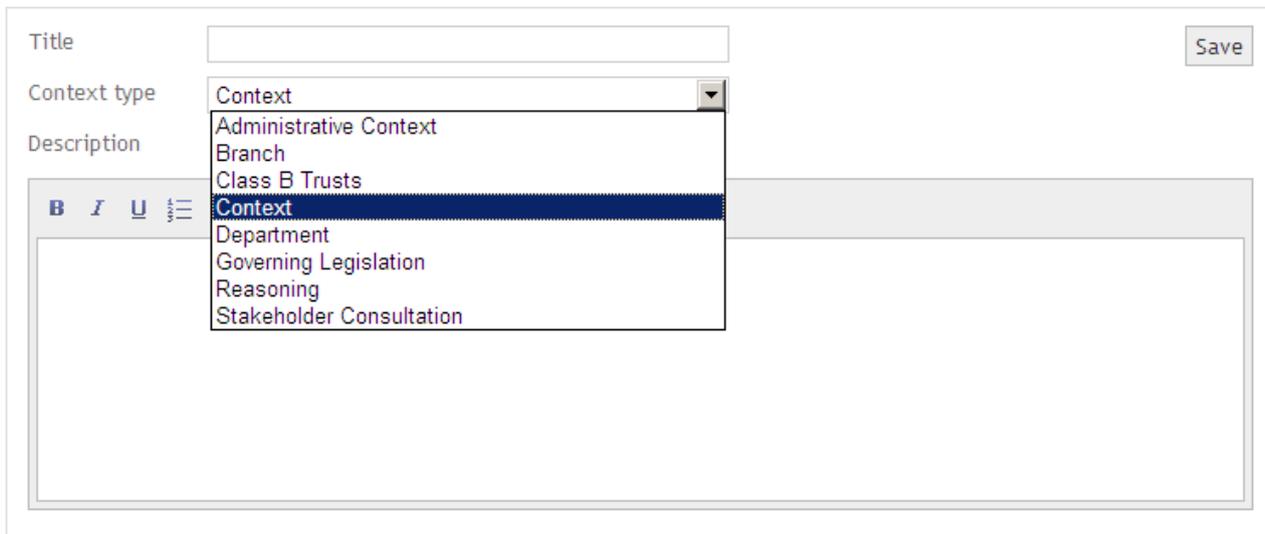
## 1.3 Adding or editing 'Context' elements

To add detail to a Context element right-click on the 'Context' heading in the tree menu, as shown below, and select 'Add content'



The example below shows a blank Context entry in the edit screen

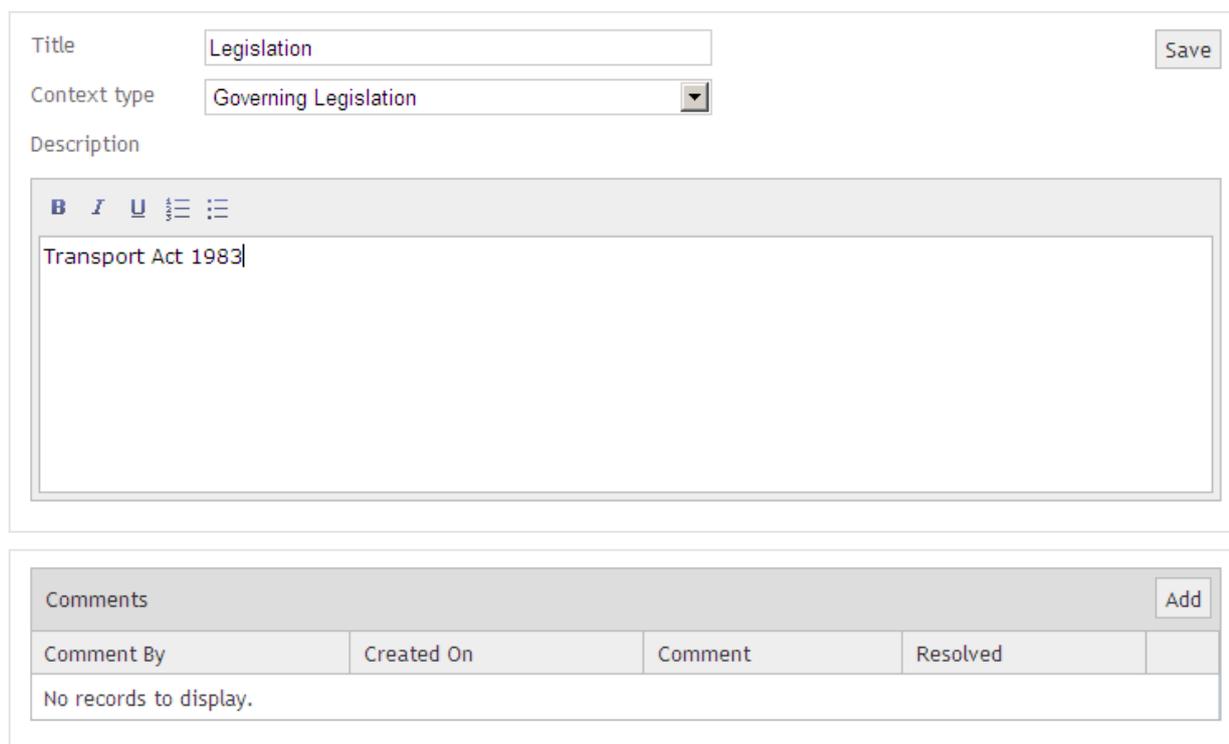
Context elements may be one of a number of 'types' as shown in the drop down list below. This list may alter over time. Selecting some Context types may automatically populate the context field with default content.



The screenshot shows a form with the following fields:

- Title:** An empty text input field.
- Context type:** A dropdown menu currently showing 'Context'. The dropdown list is open, showing the following options: Administrative Context, Branch, Class B Trusts, Context (highlighted), Department, Governing Legislation, Reasoning, and Stakeholder Consultation.
- Description:** A rich text editor with a toolbar containing Bold (B), Italic (I), Underline (U), and a list icon. The text area is empty.
- Save:** A button in the top right corner.

The example below shows an entry in the edit screen for a 'Governing Legislation' Context element.



The screenshot shows a form with the following fields:

- Title:** A text input field containing 'Legislation'.
- Context type:** A dropdown menu showing 'Governing Legislation'.
- Description:** A rich text editor with a toolbar containing Bold (B), Italic (I), Underline (U), and list icons. The text area contains 'Transport Act 1983'.
- Save:** A button in the top right corner.

Below the form is a 'Comments' section:

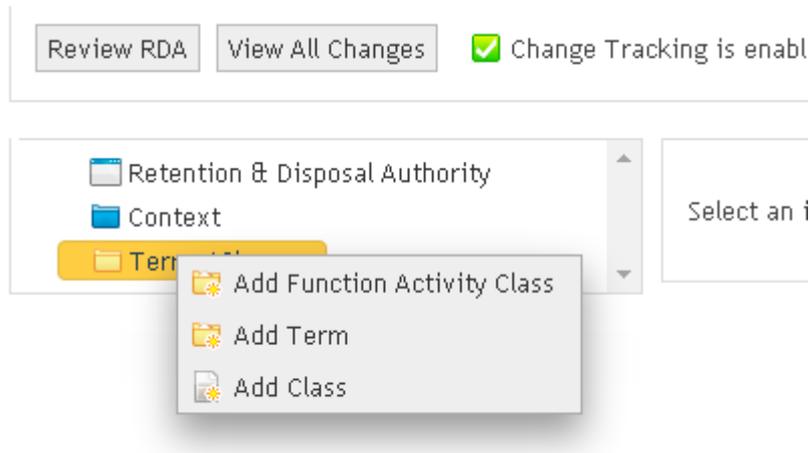
- Comments:** A section with an 'Add' button in the top right.
- Table:** A table with the following columns: Comment By, Created On, Comment, Resolved, and an empty column.
- Content:** The table contains the text 'No records to display.'

**Important:** You must click the 'Save' button after entering data in the Title/ Description fields, and before exiting or moving on, or your changes will be lost.

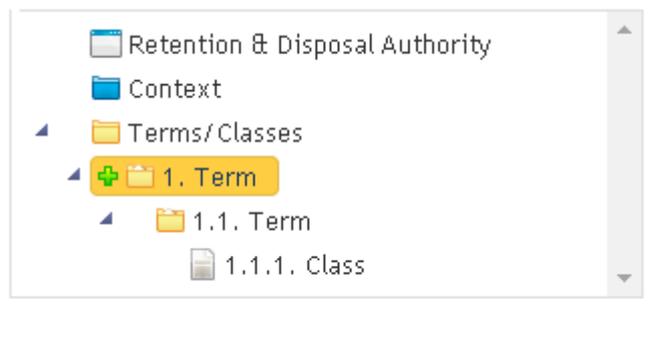
To edit a Context element simply click on the element heading and enter any changes in the edit screen. To delete a Context element right click on the element header and select 'Delete' from the drop list.

## 1.4 Adding Terms/Classes

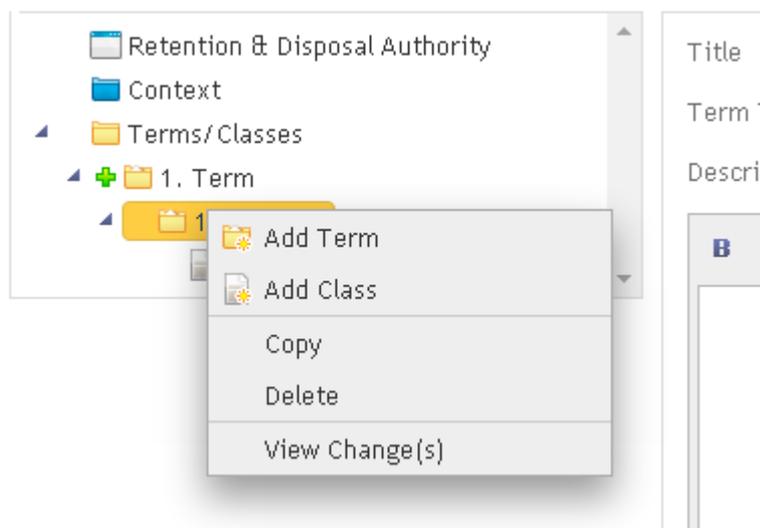
Functions, Activities, or Classes can be added individually it is also possible to simply add a nested set of a Function, an Activity and a Class. To add Terms/Classes right click on the 'Terms/Classes' heading on the Table of Content/Tree menu:



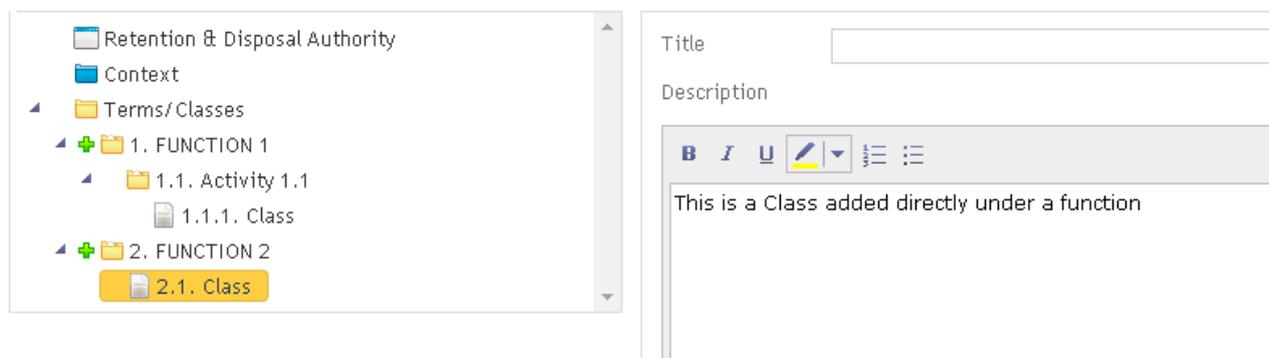
Selecting 'Add Function Activity Class' will add a combined nested set with default headings:



A right click on any heading will provide the option of an adding Terms or Classes at the next level down, copying the term or Class, or allow the term (and any lower nested sections) to be deleted.



The example below shows a Class added directly below the Function level.



#### Practice Note:

While ORDA allows Classes to be added by right clicking 'Terms/Class' and selecting 'Add Class' this option is not supported by PROV

Classes should always be nested under either a Function or an Activity. PROV's preference is for Class to be defined and nested at as high a level as possible (i.e. under a Function)

Selecting 'Copy' from the right click options will place a duplicate of the term at the same level; it will not however duplicate levels that are nested within the duplicated term/class.

**Important:** Deleting a term will also remove any Terms/Classes that are nested within that term.

It is also possible to 'Drag & Drop' any term within the tree menu by clicking on the term and dragging it to where you wish to reposition it. Elements nested within the term being dragged will also be moved. ORDA will automatically re-sequence the numbering for all Terms/Classes.

## 1.5 Editing Terms/Classes

- 'Functions' should have a 'Title'; a 'Term Type' of "Function"; and a 'Description'; they may also have an 'Appraisal Context'.
- 'Activity's should have a 'Title'; a 'Term Type' of "Activity"; and a 'Description'; they may also have an 'Appraisal Context'.
- 'Class's are generally not titled, (they default to "Class") but still require a 'Description'.

#### Practice Note:

Function title entries should be capitalised; Activity titles should use normal sentence case; and Classes are generally not titled, they default to the generic "Class" title.

The editing window example below is at the 1st or “Function” level but is otherwise identical to the “Activity” level. The ‘Term Type’ field is omitted for Classes but additional ‘Disposal’ fields are available.

The screenshot shows a web-based editing interface. On the left is a tree view under 'Retention & Disposal Authority' with a sub-tree for 'Terms/Classes'. The main area contains a form for 'FUNCTION A'. The form includes a 'Title' field with 'FUNCTION A', a 'Term Type' dropdown set to 'Function', and a 'Save' button. Below these are two rich text editors: 'Description' (containing 'This is Function A') and 'Appraisal Context'. At the bottom are two tables: a 'See' Reference table with one entry for 'Patient Information Records' and a 'Comments' table with the message 'No records to display.'

Text entered into the ‘Description’ and ‘Appraisal Context’ fields can be formatted using the included editor functions.

**Important:** Ensure you click ‘Save’ before moving on or exiting, otherwise changes may be lost.

## 1.6 Adding/Editing “See” References

“See” References are used to provide a cross reference from this term to a term in a ‘General Disposal Authority’ RDA, or to another term or class within this RDA. They help reduce duplication and make it easier for users to locate the appropriate guidance.

This is a close-up of the 'See' Reference table. It has a header row with columns: Reference, Authority, Term, and Description. Below the header, the text 'No records to display.' is shown. An 'Add' button is located in the top right corner of the table area.

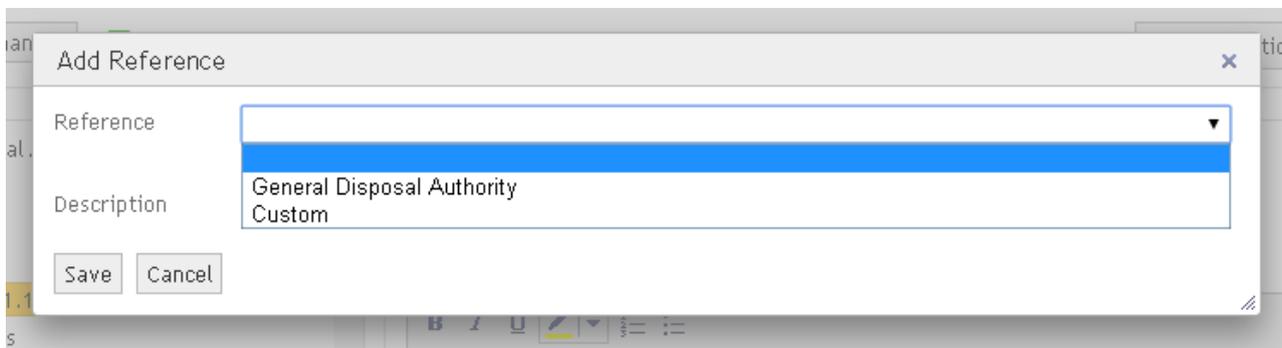
### Practice Note:

It is possible to reference any document using the “See” Reference capability, PROV’s practice is to limit references to documents maintained by PROV. In order of preference, references could link to:

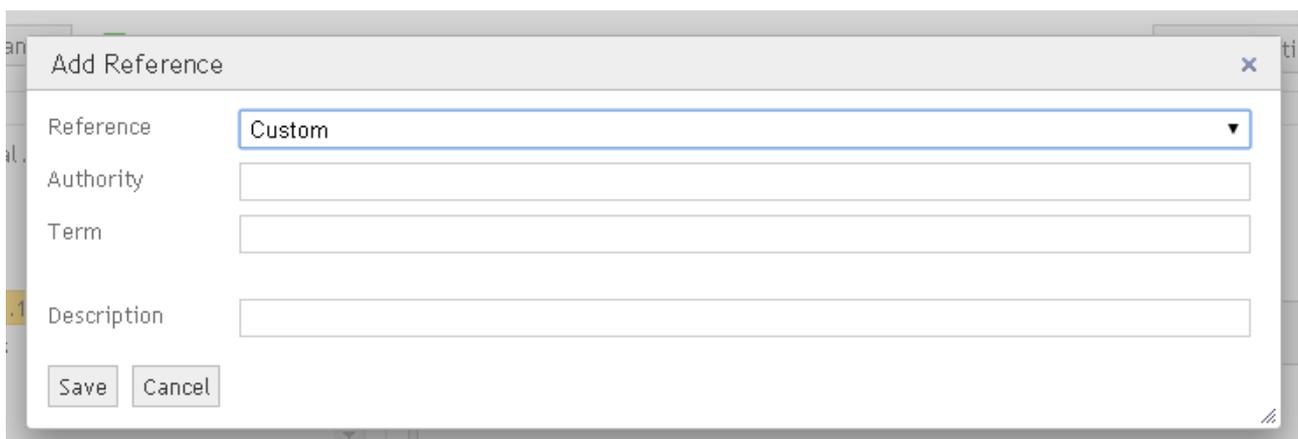
- Another Term or Class within the RDA being drafted
- A PROV ‘General Disposal Authority’
- Another PROV published RDA

While it is possible to add references at Function, Activity and Class level in ORDA, PROV’s practice is to limit these to Function and Activity level entries.

Clicking on ‘Add’ opens an entry window and the drop list in the Reference field offers a choice of either a ‘General Disposal Authority’ or ‘Custom’ option. (see example below)



If you wish to reference another term or class within this RDA selecting ‘Custom’ in the ‘Reference’ field will open 3 entry fields (Authority; Term; and Description), selecting ‘General Disposal Authority’ will open 2 entry fields (Authority; and Description). For ‘General Disposal Authority’ the Authority field will provide a drop list of RDA’s, while for ‘Custom’ the field will be a free text entry.



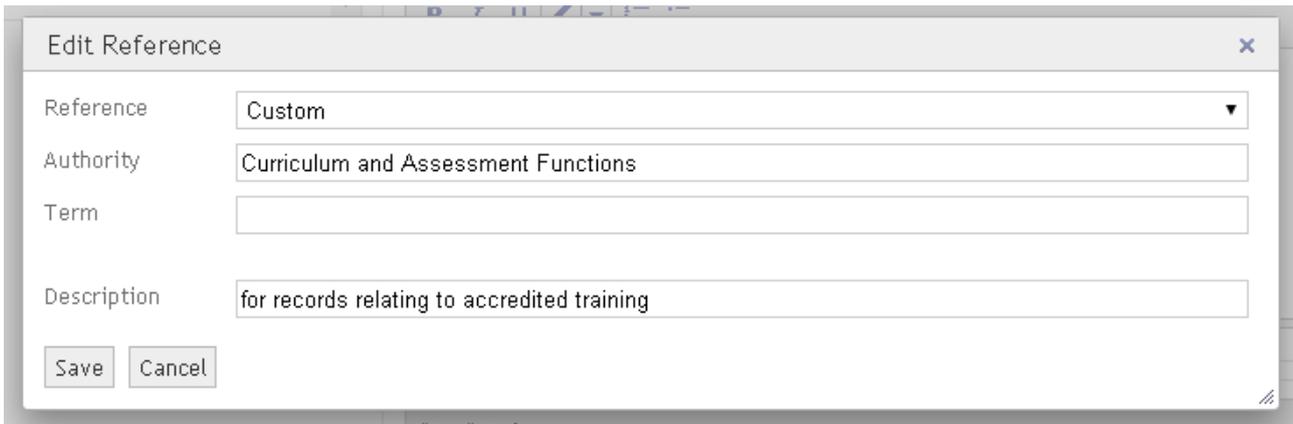
**Practice Note:**

‘Authority’ entries should comprise the title of the referenced document, for PROV RDA’s this does not include the RDA number.

‘Term’ entries should always be used when referencing another Term or Class within the RDA being drafted

‘Description’ entries should start with “for” and detail of the specific area in the referenced document that links with the Function or Activity.

This is an example of a ‘See’ Reference entry for a reference to a separate published PROV RDA.



The following example shows how references are displayed in an RDA exported as a Word document

No	Function/Activity	Description	Status	Disposal Action
1	<b>FUNCTION 1</b>	This is Function 1		
1.1	<b>Activity 1</b>	This is Activity 1 of Function 1 See <b>3.1.1</b> for records related to Risk Management		
1.2	<b>Activity 2</b>	This is Activity 2 of Function 1 See <i>Water Industry Functions</i> for records related to water treatment		
2	<b>FUNCTION 2</b>	This is another Function level entry See <i>Curriculum and Assessment Functions</i> for records relating to accredited training		
2.1		This is a Class added directly under a function		

- The reference for Activity 1 is within this RDA, and is a ‘Custom’ reference that includes a term and description.
- The reference for Activity 2 is a ‘General Disposal Authority’ entry that has selected ‘Water Industry Functions’ from the Authority options, has no Term entry, and has a description.
- The reference for Function 2 is to another PROV published RDA, and is a ‘Custom’ reference that has no Term entry, and has a description. This is how the example reference entry above would be presented in an exported Word document.

## 1.7 More information

For more information on using ORDA go to:

<https://prov.vic.gov.au/recordkeeping-government/learning-resources-tools/orda>

For a step-by-step advice on developing an RDA go to:

<https://prov.vic.gov.au/recordkeeping-government/how-long-should-records-be-kept/rda-development-step-by-step>

For further information regarding disposal go to:

<https://prov.vic.gov.au/recordkeeping-government/how-long-should-records-be-kept>

Should you require further assistance or advice with ORDA, or the Retention and Disposal of public records, email the PROV Appraisal and Documentation team at: [agency.queries@prov.vic.gov.au](mailto:agency.queries@prov.vic.gov.au)