

ORDA Agency User Guide 10

Track Changes & Comments

ORDA has a number of features to assist in the iterative review/update development cycle for a draft RDA. These include track changes, which covers both structural and text changes, and comments.

Comments are always enabled but track changes are enabled or disabled by PROV when the RDA is initially registered.

1 Track Changes

1.1 Enabling/Disabling Track Changes

The 'Track changes' functionality is enabled or disabled for a specific RDA by PROV. The current status will be indicated by a ticked checkbox in the 'Details' pane on the 'Edit RDA' screen.

Edit Retention & Disposal Authority

- Details

RDA No.	Draft Test	RDA Title.	Draft for documentation development
RDA Type.	Function Specific	Agencies	Test Agency

Review RDA

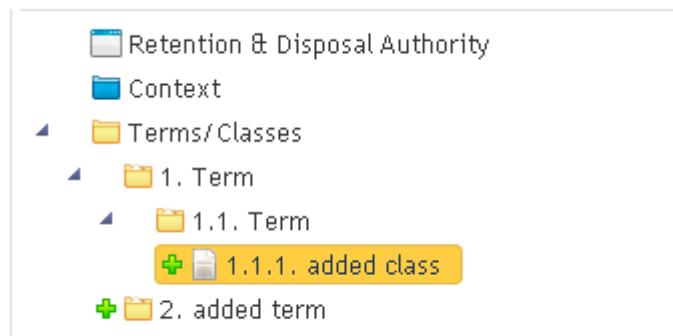
View All Changes

Change Tracking is enabled

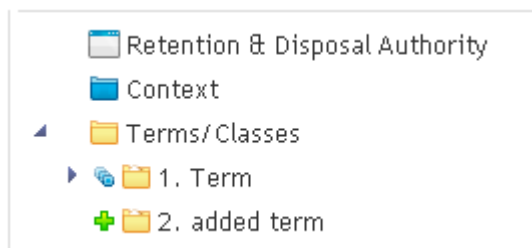
Changes made to the RDA with Track changes enabled will flag entries on the Tree menu with icons, with the changes themselves having visible effect on the 'Edit RDA' and 'View RDA' screens. Detail of the changes themselves can be viewed or exported from the 'View all changes' screen and must be either individually accepted or rejected before the RDA is approved.

1.2 Structural changes – Added terms or classes

When a Term or class is added a **+** icon will appear on the tree menu next to the newly added entry.

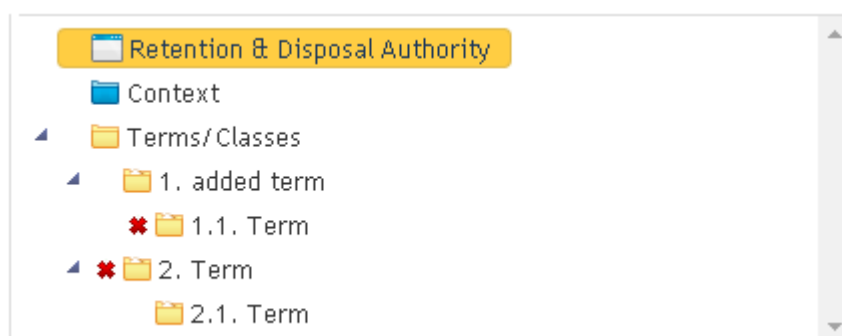


When the tree menu is compressed the **+** icon is used to indicate that there is an added term/class at a lower level.



1.3 Structural changes - Deleted Terms or Classes

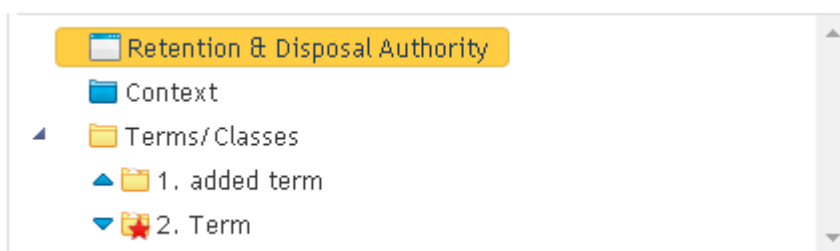
When a second level (Activity) Term or Class is deleted the next higher level will display the ***** icon. The example below has had the 1.1.1 Class deleted and the 2.2 Activity also deleted. If a term is deleted the ***** icon will not be displayed, however the deletion will still appear in the 'View all Changes' screen and will need to be accepted.



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

1.4 Structural changes - Moved Terms or Classes

When a Term or Class is moved within the tree structure, the ▲ or ▼ icon will be used to indicate both a that a change has occurred and the direction of the change.



1.5 Track changes for text entries

When text is added, edited, reformatted, or deleted from the description fields in an RDA, or an additional element such as a disposal action or justification is added, a change alert icon (■) will display next to the entry in the tree menu that has been changed. If the tree menu has been compressed the ■ icon will appear alongside the next highest visible term.

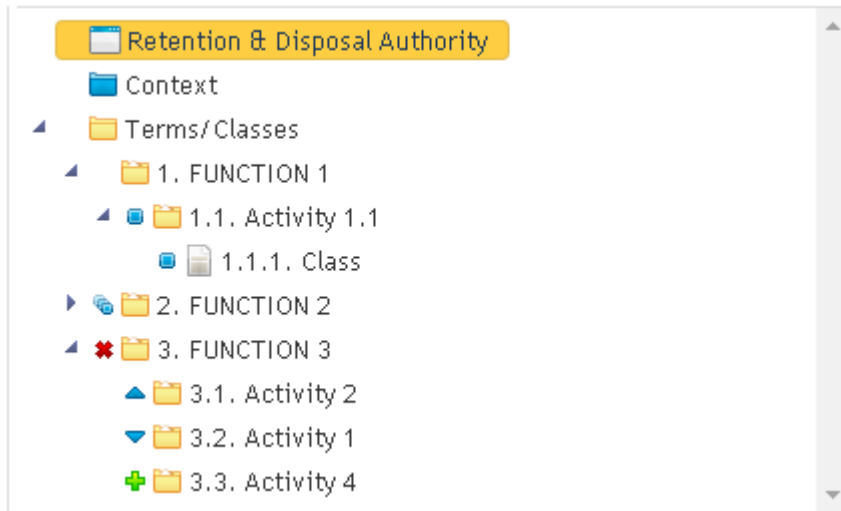


It is possible to view all unaccepted changes made to the RDA by clicking on the 'View all changes' button.

1.6 Accepting or rejecting changes

Changes that are made to the RDA structure or to text in various description fields will display in 'Edit RDA' and 'View RDA' with all the changes applied. However each change can be individually reviewed and accepted or rejected. Changes can be reviewed by clicking 'View all changes' button on the 'Edit RDA' screen, or by exporting the changes to a Word document by clicking the 'Export to Word' button on the 'View Changes' screen.

The examples below show the Tree menu and the 'View Changes' screen. Individual changes show each change - what text has been added, modified, or removed, and what nodes, terms, classes or other elements have been added, moved or deleted.



View Changes

Draft for documentation development

Terms / Classes

1.1. Activity 1.1

Changes	
Change	Detail
Changed Description	This is edited text (by deletion and addition)
<input type="button" value="Accept"/> <input type="button" value="Reject"/>	

1.1.1. Class

Changes	
Change	Detail
Changed Description	This is added text for track changes - have also added Disposal justification
<input type="button" value="Accept"/> <input type="button" value="Reject"/>	
Justification Condition(s)	
This is added text for disposal justification	
Changes	
Change	Detail
Added	+ This node was added.
<input type="button" value="Accept"/> <input type="button" value="Reject"/>	

Key:

- Aa Modified
- Aa Added
- ✖ Removed
- 3 x Changed
- + 2 x Added
- ✖ 1 x Removed
- ▼ 2 x Moved

2.1. Activity 2.1

Changes	
Change	Detail
Changed Description	This is Activity 1 of function 2
<input type="button" value="Accept"/> <input type="button" value="Reject"/>	

3.1. Activity 2

Changes	
Change	Detail
Moved	▲ This node was moved up by 1
<input type="button" value="Accept"/> <input type="button" value="Reject"/>	

3.2. Activity 1

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

3.3. Activity 4

Changes		
Change	Detail	
Added	➕ This node was added.	Accept Reject

Removed Node

Changes		
Change	Detail	
Removed	Term: Activity 3 ✖ This node was removed.	Accept Reject

Each individual change can be either accepted or rejected. Accepting or rejecting the changes will remove them from the 'View Changes' screen, remove the ➕ and 🗑️ icons from the tree menu in 'Edit RDA' screen, and add a system generated comment to each of the terms and classes.

2 Comments

2.1 Adding Comments

Comments can be made manually by Agency Editors and PROV Reviewers, or automatically by the ORDA application itself. Comment entries are possible at RDA, Term, or Class level. To add a manual entry click the 'Add' button in the 'Comments' pane of the 'Edit RDA' screen.

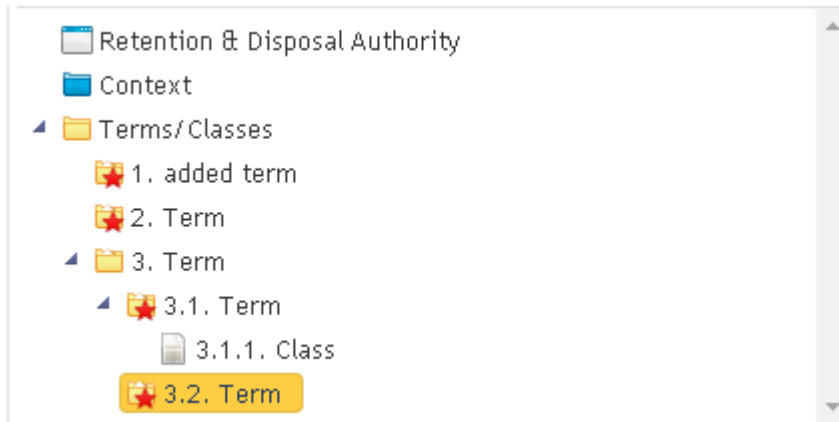
Comments					Add
Comment By	Created On	Comment	Resolved		
No records to display.					

This will open a free text field where the comment can be entered and saved. ORDA will automatically add details of when the comment was made, and who made it. ORDA will also enable additional buttons to either allow the comment to be deleted, edited, or resolved. The actual buttons enabled by ORDA will depend on the identity and role of the user, the status of the RDA and the workflow status transitions that have occurred since the comment was made.

Comments					Add
Comment By	Created On	Comment	Resolved		
Testuser Surname	18/6/2015 1:49 PM	This is a manually entered comment		Edit	Delete

2.2 Editing / Deleting / and Resolving Comments

Unresolved comments are indicated by a red star icon (★). When the menu tree is compressed the icon will displayed at the next higher level.



While an Agency editor can add new comments, only in certain cases can they edit or delete their own or system generated comments. Agency editors however cannot resolve existing comments. Once an RDA is referred to PROV for review an Agency editor is unable to add or make any changes including to comments. If PROV returns the RDA to the agency for revision the Agency editor can add new comments but is unable to edit or delete any previous comments. The following table provides an overview of an Agency editor’s capabilities before and after the RDA is referred to PROV and returned for revision.

Comment action capabilities					
Before workflow status change			After workflow status changes		
New Comment	Add	<input checked="" type="checkbox"/>	New Comment	Add	<input checked="" type="checkbox"/>
Agency comment (Unresolved)	Edit	<input checked="" type="checkbox"/>	Agency comment (Unresolved)	Edit	<input type="checkbox"/>
	Delete	<input checked="" type="checkbox"/>		Delete	<input type="checkbox"/>
	Resolve	<input type="checkbox"/>		Resolve	<input type="checkbox"/>
System comment (Unresolved)	Edit	<input checked="" type="checkbox"/>	System comment (Unresolved)	Edit	<input type="checkbox"/>
	Delete	<input checked="" type="checkbox"/>		Delete	<input type="checkbox"/>
	Resolve	<input type="checkbox"/>		Resolve	<input type="checkbox"/>
PROV comment (Unresolved)	Edit	<input type="checkbox"/>	PROV comment (Unresolved)	Edit	<input type="checkbox"/>
	Delete	<input type="checkbox"/>		Delete	<input type="checkbox"/>
	Resolve	<input type="checkbox"/>		Resolve	<input type="checkbox"/>
Agency comment (resolved)	Edit	<input type="checkbox"/>	Agency comment (resolved)	Edit	<input type="checkbox"/>
	Delete	<input type="checkbox"/>		Delete	<input type="checkbox"/>
	Resolve	<input type="checkbox"/>		Resolve	<input type="checkbox"/>
System comment (resolved)	Edit	<input type="checkbox"/>	System comment (resolved)	Edit	<input type="checkbox"/>
	Delete	<input type="checkbox"/>		Delete	<input type="checkbox"/>
	Resolve	<input type="checkbox"/>		Resolve	<input type="checkbox"/>
PROV comment (resolved)	Edit	<input type="checkbox"/>	PROV comment (resolved)	Edit	<input type="checkbox"/>
	Delete	<input type="checkbox"/>		Delete	<input type="checkbox"/>
	Resolve	<input type="checkbox"/>		Resolve	<input type="checkbox"/>

2.3 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