

## 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 3.2 – Importing

If you have already prepared your disposal schedule using MS Office (or third party software e.g. AKA), you can import this data into ORDA rather than manually drafting your schedule.

Schedules can be imported in either XML or CSV format.

To conduct an import, navigate to the Edit Retention & Disposal Schedule screen and click on "Import Options" and select how you want to import your schedule:

#### Edit Retention & Disposal Schedule

- Details 4 Pending changes

RDS No.	0003	RDS Title.	Disposal Schedule for Functional records of th...	Version	1
RDS Type.	Functional	Agencies	TASMANIAN WATER AND SEWERAGE CORPORATION (TASWATER)	Last Updated	01/10/2014

Change Tracking is enabled

Retention & Disposal Schedule

- Context
- Terms/Classes

### XML Import

When importing an XML file, the import file **must** accord with the ORDA XML Schema. This can be viewed by clicking the "Download XML Schema" link via the Import XML screen:

## Import XML for Disposal Schedule for Functional records of the Tasmanian Water Corporation

[Download XML Schema](#) | [Go back to Disposal Authority](#)

Once the file has been appropriately prepared for import, click “Browse” to select the XML file you will be importing and then click “Upload file” to proceed.

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

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

### CSV Import

You can import your disposal schedule in CSV format, particularly if you have already prepared your disposal schedule 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:

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## Import CSV for Disposal Schedule for Functional records of the Tasmanian Water Corporation

[Download CSV Template](#) | [Go back to Disposal Authority](#)

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

- Download the CSV template and save this locally;
- Copy and paste your disposal schedule 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 are assigned to a single function or activity:

A	B	C	D	E	F	G	H	I
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 maintaing the organisation's broad public profile.	Addresses	The activity of giving addresses for community relations purposes. Includes speeches and multimedia presentations.	Final versions of addresses and other public information released by the Minister, statutory officers and senior agency officers.				Retain as State Archives
COMMUNITY RELATIONS	The function of establishing rapport with the community, and raising and maintaing the organisation's broad public profile.	Addresses	The activity of giving addresses for community relations purposes. Includes speeches and multimedia presentations.	Final versions of addressed not considered significant.	2		action completed	Destroy
COMMUNITY RELATIONS	The function of establishing rapport with the community, and raising and maintaing the organisation's broad public profile.	Addresses	The activity of giving addresses for community relations purposes. Includes speeches and multimedia presentations.	Records documenting the preparation of addresses and speeches.	2		action completed	Destroy
COMMUNITY RELATIONS	The function of establishing rapport with the community, and raising and maintaing the organisation's broad	Arrangements	The activities involved in arranging for a journey or trip.	Records documenting arrangements to support the community relations	2		action completed	Destroy

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

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

This will ensure that when the CSV file is imported, the disposal statements are correctly expressed. An alternative may be to remove all values from this column, and add this data manually (once the bulk of the data has been imported).

Also note the CSV import is limited to importing core disposal schedules data (ie: it excludes elements such as Disposal justifications).

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

## Related TAHO Resources:

*Appraisal Statement for State records required as State Archives*

*Guideline 2 Retention and disposal of State records*

*Guideline 4 Agency determination of access restrictions*

*Guideline 6 Developing a functional records disposal schedule*

*Advice 2 All about appraisal*

*Advice 13 Writing disposal classes*

*Advice 28 Getting started on the development of an agency functional disposal schedule*

Information is available via the GISU website on relevant training programs recommended for agencies undertaking Retention + Disposal Schedule development projects.

## Contact us:

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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
2.0	August 2015	Sam Foster-Davies	Review	Introduction; Resources; Contact Us
1.0	December 2014	Sam Foster-Davies	Initial Release	All

## Amendments in this Release

Section Title	Section Number	Amendment Summary
Contact Us; Introduction		Updated Unit name and email address
Resources		Removed hyperlinks and updated to reflect revised tools

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