

# Unit 225

## Principles of business document production and information management

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### STORING INFORMATION



# THE MANAGEMENT OF INFORMATION

- The method an organisation adopts for this will depend on
  - the information held
  - the size of the organisation.
- Information can be held
  - manually
  - electronically.



# MANUALLY HELD (PAPER) INFORMATION

- paper files
- card indexes – eg client addresses
- petty cash records – petty cash account, vouchers
- stock control records – stock control cards, requisitions, etc
- business transaction records – invoices, orders, etc.



# MANUAL FILING CABINETS

- lateral
- vertical
- Horizontal.



# LATERAL SYSTEMS

- Files are held in hanging wallets in rows in large often open wall cabinets.
- The suspended files have a tab stating the name of the file.
- Make the most of the space available as they can be extended as far as the ceiling.
- Several people can use the system at once.
- Not so secure as other systems.
- Files can become dusty.



# VERTICAL SYSTEMS

- Files are placed in drawers in suspension pockets that hang from side to side.
- The top of the suspension pocket will have a tab that will indicate the name of the file.
- Only one person at a time can use the system.
- The most popular system.
- Easy to use.
- Files can be kept clean and secure in locked drawers.



# HORIZONTAL SYSTEMS

- Used for storing small quantities of documents lying flat in shallow drawers.
- Suitable for plans and drawings.
- Surface can be used for other equipment.



# DOCUMENT HOLDERS

- Information can be held in
  - ring binders
  - box files
  - wallets
  - hanging files.





# ELECTRONICALLY HELD INFORMATION

- Must be controlled like manual information.
- Recognised system is needed that is understood and used by all in the organisation.
- Electronic records are likely to be held in databases.
- Advantages of storing information electronically are
  - space saving
  - speed of access/retrieval
  - may be used by many people at the same time
  - ease of updating.



# SECURITY AND CONFIDENTIALITY

- The security and confidentiality of the information is critical.
- The Data Protection Act controls the use of personal information.
- Confidential – it must be secured
  - if manual, then held in a locked area or cabinet
  - if electronically held, password controlled.

