

Unit 318 (B&A 57): Principles of business communications and information

Handout 6: Manual information systems

Storage systems for manually held information (hardware)

- Lateral
- Vertical
- Horizontal

Classification systems

- Alphabetical
- Numerical
- Alphanumeric
- Chronological



Alphabetical

Documents will be placed in alphabetical order:

- by **name** of the company or the person concerned
- by **location**
- by **subject**.

Numerical

- Information is stored by number, eg invoice or employee number.
- A separate alphabetical card index of names is required to provide the key to the file number.
- This system is easy to expand as new files are simply assigned the next number.

Alphanumerical

- Information is filed first of all alphabetically and then by number, eg A1, A2, etc.
- Again, a card index is required.



Chronological

- Information is in date order.
- Used when the date is the most important information, eg bank statements.
- The most recent date is at the front.

Centralised filing

- A central filing department where all the records will be kept, controlled by filing clerks.
- In large organisations, eg hospitals.
- When files are required, application must be made to the department.
- This is useful where records are likely to be used by more than one department.

Cross referencing

- Where a document could be in one or more files.
- A decision is made on where the most appropriate place is for the document.
- A card is placed in the other locations giving reference to where it has been filed.
- This saves the document being copied to each file.

Absent card/outguide

- Individual documents should not be removed from files.
- If they are required a photocopy should be given instead, so as not to split up the file.
- When a whole file needs to be borrowed, a card should be put in its place stating the date and name and contact details of the borrower.
- This avoids time being wasted in looking for files.

File accurately

Failure to correctly file documents makes them difficult or impossible to find.

Failure to find a document can be expensive and time consuming.

It is important that a filing procedure is established for any manual system to ensure that no documents are lost.

Missing files

Check if someone else has taken it.

Check the files nearby in case of misfiling.

Report it missing and work with others to find it.

Over-full files should be split into two or three separate files clearly labelled to show what they contain.

Filing should be done on a regular basis to safeguard documents.

Storage should be regularly assessed for adequacy.