

Overview

This standard is about storing, sharing, retrieving and archiving information using relevant systems in accordance with organisational procedures and legal requirements. The systems that you use may be electronic or paper based. You identify, collect, store, update and delete information in approved locations, using organisational procedures and legislation. You access information systems to locate, share, retrieve and provide required information within the agreed timescales. You identify and agree the information to be archived and maintain records of archived information for the retention period. For any problems that occur, you resolve or report them to a colleague when storing, sharing, retrieving and archiving information.

It is for professionals in business administration roles who store, share, retrieve and archive information.

Performance criteria

You must be able to:

1. identify information for storing, sharing or retrieval
2. use organisational procedures for accessing information
3. use the relevant systems for information storage, sharing and retrieval
4. follow the cyber security requirements for storage, sharing or retrieval of information
5. resolve or report problems with the system that occur during information storage
6. confirm requirements and timescales for information storage, retrieval or sharing with colleagues or customers
7. locate the required information in the information systems
8. retrieve required information from the information systems
9. resolve or report any problems that occur during retrieval of information
10. provide information in the agreed format to colleagues or customers
11. meet the agreed timescales for retrieving information
12. retrieve archived information on request
13. follow legal and organisational procedures to maintain the security and confidentiality of the information
14. identify information to be archived
15. agree the retention period for archived information
16. archive information within agreed timescales
17. comply with organisational policies, procedures and legislation requirements when archiving information
18. maintain archive records following legal and organisational procedures
19. update archived information records
20. delete information from the archive following legal and organisational policy and procedures
21. resolve or report problems that occur when archiving information
22. follow the legal, organisational, codes of practice and policies relevant to information management and the activities being carried out

Knowledge and understanding

You need to know and understand:

1. how information is stored, shared, retrieved or archived
2. the methods that can be used to collect information for storage and sharing
3. the requirements of cyber security for storage, sharing or retrieval of information
4. the types of internal and external information systems and their main features
5. the different filing locations for storage and sharing information
6. how to meet agreed timescales for storing, sharing, retrieving and archiving information
7. the legal and organisational requirements in relation to security and confidentiality of information during storage, sharing, retrieval and archiving
8. the legislation and organisational procedures covering data protection
9. the organisational and external supplier procedures to be followed to access storage systems
10. the legal and organisational procedures for deleting information and why they must be followed
11. how to check that information is accurate before storing or sharing it
12. the problems that occur with systems during storage, retrieval and archiving
13. who to report filing system problems to
14. how to agree timescales with colleagues and customers
15. how to check that retrieved information meets colleague or customer requirements
16. how to provide information in the required format for colleagues or customers
17. why it is important to meet agreed timescales and the potential impacts if they are missed
18. why information is archived
19. how to archive information
20. how to maintain archive records using organisational and supplier procedures
21. when information is deleted from storage and archive filing systems
22. how information is deleted from storage and archive filing systems
23. the legal, organisational, codes of practice and policies relevant to information management and the activities being carried out

Skills

1. communicating
2. organising
3. planning
4. problem solving
5. using technology

Store, share, retrieve and archive information

Developed by Skills CFA

Version Number 1

Date Approved 08 Feb 2021

Indicative Review Date 01 Mar 2026

Validity Current

Status Original

Originating Organisation Instructus

Original URN CFABAD332, CFABAD334

Relevant Occupations Administration, Administration and Secretarial Occupations, Business, Business and Related Associate Professionals, Administration and Law

Suite Business and Administration, Water Fittings Regulations/Byelaws Enforcement

Keywords Business; administration; data; store, retrieve; archive
