

<b>Title:</b>	Storing and Organising Business Information Digitally
<b>Level:</b>	Entry Level 3
<b>Credit value:</b>	2
<b>GLH:</b>	20
<b>Unique Reference Number:</b>	L/652/0531
<b>Sector Subject Area:</b>	14.1 Foundations for Learning and Life
<b>Aim:</b>	The aim of this unit is to develop learners' knowledge and skills in storing, organising, retrieving and sharing business information digitally in a safe and appropriate way.
<b>Assessment Type:</b>	Assessment of this unit will be through an internally set and internally assessed portfolio of evidence.
<b>Assessment Guidance:</b>	<p>Assessment decisions for skills-based learning outcomes must be made during the learner's normal work activity. Direct observation should form a primary source of evidence and be supported, where appropriate, by discussion, annotated screenshots or photographs, saved documents, or witness statements.</p> <p>Skills-based assessment must be carried out over an appropriate period of time to ensure consistency and independence of performance.</p> <p>Evidence must confirm that the learner can independently store, organise, retrieve and manage digital business information using appropriate digital tools and in line with organisational procedures.</p>

## Learning outcomes

*The learner will:*

1. Be able to store digital business information appropriately.

### Delivery content:

The aim of this learning outcome is to provide learners with the knowledge and skills to store digital business information appropriately.

The learner must demonstrate that they can:

- 1.1 **Identify types of digital business information** that may need to be stored.
- 1.2 **Save digital files in appropriate locations.**
- 1.3 **Use simple file names** that make information easy to identify.

<b>1.4 Store digital information in line with local or organisational guidelines.</b>
2. Be able to organise digital business information for easy retrieval.
<b>Delivery content:</b> The aim of this learning outcome is to provide learners with the skills to organise digital business information for easy retrieval.  The learner must demonstrate that they can: <ul style="list-style-type: none"><li>2.1 <b>Create and use folders</b> to organise digital information.</li><li>2.2 <b>Organise digital files into folders for a given purpose.</b></li><li>2.3 <b>Retrieve stored digital information</b> when required.</li><li>2.4 <b>Identify why organising digital information is important</b> in a business setting.</li></ul>
3. Be able to manage digital business information using common digital tools.
<b>Delivery content:</b> The aim of this learning outcome is to provide learners with the knowledge and skills to manage digital business information using common digital tools.  The learner must demonstrate that they can: <ul style="list-style-type: none"><li>3.1 <b>Store email messages appropriately</b> for future use.</li><li>3.2 <b>Save and retrieve attachments</b> from email messages.</li><li>3.3 <b>Enter and locate simple digital information using a basic digital tool.</b></li><li>3.4 <b>Check digital information is accurate and make simple corrections</b> when needed.</li></ul>
4. Understand the importance of security and confidentiality when handling digital business information.
<b>Delivery content:</b> The aim of this learning outcome is to provide learners with the knowledge to understand the importance of security and confidentiality when handling digital business information.  The learner must demonstrate that they can: <ul style="list-style-type: none"><li>4.1 Identify why <b>digital business information needs to be kept secure.</b></li><li>4.2 Follow <b>procedures to keep digital information confidential.</b></li><li>4.3 Identify <b>common risks to digital information security.</b></li><li>4.4 <b>Work responsibly</b> when handling digital business information.</li></ul>

<p><b>Scope of Training</b></p> <p>The Scope of Training identifies areas that must be covered during the delivery of this unit. This is the minimum that is expected but tutors are expected to include other areas, knowledge of which will benefit their learners, based on location, types of work available and from the tutors own professional experience.</p>	
<p><b>Requirements</b></p>	
<p><b>Identify types of digital business information:</b></p>	<p><b>Definition:</b> Electronic information used in a business context.</p> <p><b>Teaching must include:</b></p> <ul style="list-style-type: none"> <li>• Learners must be able to identify examples such as: <ul style="list-style-type: none"> <li>○ Emails</li> <li>○ Letters</li> <li>○ Reports</li> <li>○ Spreadsheets</li> <li>○ Customer information</li> <li>○ Forms</li> </ul> </li> <li>• They must understand that business information can contain sensitive data.</li> </ul> <p><b>Teaching could include:</b></p> <ul style="list-style-type: none"> <li>• Internal vs external information.</li> <li>• Personal data examples.</li> </ul>
<p><b>Save digital files in appropriate locations:</b></p>	<p><b>Definition:</b> Storing digital files in suitable locations so they can be accessed, managed and protected appropriately.</p> <p><b>Teaching must include:</b></p> <ul style="list-style-type: none"> <li>• Saving files to personal and shared drives.</li> <li>• Selecting an appropriate folder location.</li> <li>• Understanding why location matters.</li> <li>• Avoiding saving in incorrect or temporary locations.</li> <li>• Learners must demonstrate they can independently: <ul style="list-style-type: none"> <li>○ Save a file in the correct location for a given task.</li> </ul> </li> </ul> <p><b>Teaching could include:</b></p> <ul style="list-style-type: none"> <li>• Difference between local, shared and cloud storage.</li> <li>• Recognising restricted or secure folders.</li> </ul>

	<ul style="list-style-type: none"> <li>• Using “Save As” to change file location.</li> <li>• Moving files between folders.</li> <li>• Basic version control e.g. adding dates to file names.</li> <li>• Awareness of automatic saving or backups.</li> </ul>
<p><b>Use simple file names:</b></p>	<p><b>Definition:</b> Naming files clearly so they can be easily identified.</p> <p><b>Teaching must include:</b></p> <ul style="list-style-type: none"> <li>• Using meaningful names e.g. “ClientInvoice_Jan2026”.</li> <li>• Avoiding vague names e.g. “Document1”.</li> <li>• Following any naming conventions provided.</li> <li>• Learners must demonstrate: <ul style="list-style-type: none"> <li>○ Creating clear and logical file names.</li> </ul> </li> </ul> <p><b>Teaching could include:</b></p> <ul style="list-style-type: none"> <li>• Adding dates or project names.</li> <li>• Using consistent naming formats.</li> <li>• Avoiding unclear names e.g. “Document1”.</li> <li>• Adding simple version numbers e.g. v1, v2.</li> </ul>
<p><b>Store digital information in line with local or organisational guidelines:</b></p>	<p><b>Definition:</b> Following workplace rules for storing information.</p> <p><b>Teaching must include:</b></p> <ul style="list-style-type: none"> <li>• Awareness of organisational storage procedures.</li> <li>• Understanding restricted access areas.</li> <li>• Following basic data handling expectations.</li> <li>• Learners must demonstrate they can: <ul style="list-style-type: none"> <li>○ Store files in accordance with given guideline</li> </ul> </li> </ul> <p><b>Teaching could include:</b></p> <ul style="list-style-type: none"> <li>• Following folder structures set by the organisation.</li> <li>• Applying naming conventions.</li> <li>• Saving files in restricted or shared areas appropriately.</li> <li>• Following basic data protection expectations.</li> <li>• Understanding retention or deletion rules.</li> </ul>
<p><b>Create and use folders:</b></p>	<p><b>Definition:</b> Creating and managing folders to organise digital files in a clear and logical way.</p>

	<p><b>Teaching must include:</b></p> <ul style="list-style-type: none"> <li>• Creating new folders in an appropriate location.</li> <li>• Naming folders clearly and logically.</li> <li>• Moving files into folders.</li> <li>• Opening and navigating between folders.</li> <li>• Understanding why folders are used to organise information.</li> <li>• Learners must be given opportunity to practise:             <ul style="list-style-type: none"> <li>○ Creating at least one folder structure.</li> <li>○ Moving files into that folder.</li> </ul> </li> </ul> <p><b>Teaching could include:</b></p> <ul style="list-style-type: none"> <li>• Creating subfolders within main folders.</li> <li>• Renaming folders.</li> <li>• Deleting empty folders.</li> <li>• Moving folders to new locations.</li> <li>• Using simple date- or project-based folder structures.</li> <li>• Using search functions to locate folders.</li> </ul>
<p><b>Organise digital files into folders for a given purpose:</b></p>	<p><b>Definition:</b> Arranging digital files into an appropriate folder structure based on a specific task, project or business need.</p> <p><b>Teaching must include:</b></p> <ul style="list-style-type: none"> <li>• Grouping files logically e.g. by client, date, project.</li> <li>• Structuring folders clearly.</li> <li>• Avoiding disorganised storage.</li> <li>• Learners must demonstrate:             <ul style="list-style-type: none"> <li>○ Organising files according to a given scenario.</li> </ul> </li> </ul> <p><b>Teaching could include:</b></p> <ul style="list-style-type: none"> <li>• Creating subfolders within a main folder.</li> <li>• Reorganising an untidy folder structure.</li> <li>• Using consistent folder naming conventions.</li> <li>• Applying simple chronological structures (e.g. year/month).</li> <li>• Comparing two different folder structures and discussing suitability.</li> </ul>

<p><b>Retrieve stored digital information:</b></p>	<p><b>Definition:</b> Locating and accessing previously saved digital files when required.</p> <p><b>Teaching must include:</b></p> <ul style="list-style-type: none"> <li>• Navigating folder structures.</li> <li>• Opening stored files.</li> <li>• Using search functions where available.</li> <li>• Learners must demonstrate: <ul style="list-style-type: none"> <li>○ Locating a specified file independently.</li> <li>○ Opening the correct file without assistance.</li> </ul> </li> </ul> <p><b>Teaching could include:</b></p> <ul style="list-style-type: none"> <li>• Sorting files by name or date.</li> <li>• Using file previews to confirm content.</li> <li>• Filtering search results.</li> <li>• Retrieving files from shared or cloud-based locations.</li> <li>• Recovering recently accessed files.</li> </ul>
<p><b>Identify why organising digital information is important:</b></p>	<p><b>Definition:</b> Understanding the reasons why digital information should be organised in a clear and structured way within a business environment.</p> <p><b>Teaching must include:</b></p> <ul style="list-style-type: none"> <li>• How organisation improves efficiency (saving time).</li> <li>• How organisation reduces errors (avoiding duplicate or incorrect files).</li> <li>• How organisation supports teamwork (shared access and clarity).</li> <li>• How organisation helps meet business or organisational requirements.</li> <li>• Learners must explain: <ul style="list-style-type: none"> <li>○ At least one reason why organising digital information is important.</li> </ul> </li> </ul> <p><b>Teaching could include:</b></p> <ul style="list-style-type: none"> <li>• Examples of problems caused by poor organisation.</li> <li>• Simple case scenarios showing time lost searching for files.</li> </ul>

	<ul style="list-style-type: none"> <li>• Links to data protection or compliance requirements.</li> <li>• Impact on customer service or professional image.</li> </ul>
<b>Store email messages appropriately:</b>	<p><b>Definition:</b> Saving and organising email messages so they can be accessed later and retained in line with business needs.</p> <p><b>Teaching must include:</b></p> <ul style="list-style-type: none"> <li>• Creating and using email folders.</li> <li>• Moving emails from the inbox into appropriate folders.</li> <li>• Recognising which emails need to be retained.</li> <li>• Understanding basic reasons for retaining business emails e.g. records, evidence, communication history.</li> <li>• Learner must demonstrate:             <ul style="list-style-type: none"> <li>○ Filing an email into an appropriate folder.</li> <li>○ Selecting a suitable folder for a given scenario.</li> </ul> </li> </ul> <p><b>Teaching could include:</b></p> <ul style="list-style-type: none"> <li>• Renaming or organising email folders.</li> <li>• Using flags or categories to organise emails.</li> <li>• Archiving emails.</li> <li>• Deleting unnecessary emails appropriately.</li> <li>• Identifying emails that may contain sensitive information.</li> </ul>
<b>Save and retrieve attachments:</b>	<p><b>Definition:</b> Downloading, storing and reopening files received as email attachments in an appropriate and secure location.</p> <p><b>Teaching must include:</b></p> <ul style="list-style-type: none"> <li>• Downloading attachments from email messages.</li> <li>• Choosing an appropriate save location.</li> <li>• Naming the attachment appropriately where required.</li> <li>• Opening saved attachments safely.</li> <li>• Understanding basic awareness of suspicious attachments.</li> <li>• Learners must demonstrate:             <ul style="list-style-type: none"> <li>○ Saving an attachment to the correct folder.</li> <li>○ Reopening the saved attachment independently.</li> </ul> </li> </ul> <p><b>Teaching could include:</b></p> <ul style="list-style-type: none"> <li>• Renaming attachments before saving.</li> </ul>

	<ul style="list-style-type: none"> <li>• Saving attachments to shared or cloud locations.</li> <li>• Checking file type before opening.</li> <li>• Scanning attachments where security tools are available.</li> <li>• Deleting attachments when no longer required.</li> </ul>
<p><b>Enter and locate simple digital information using a basic digital tool:</b></p>	<p><b>Definition:</b> Inputting and finding simple digital information using a common workplace digital system.</p> <p><b>Teaching must include:</b></p> <ul style="list-style-type: none"> <li>• Entering simple data accurately into a digital tool.</li> <li>• Saving entered information where appropriate.</li> <li>• Locating specific information within the tool.</li> <li>• Using basic features to find information e.g. search or simple sort functions.</li> <li>• CRM-style simple system.</li> <li>• Learner must demonstrate:             <ul style="list-style-type: none"> <li>○ Inputting information correctly.</li> <li>○ Locating specified information independently.</li> </ul> </li> </ul> <p><b>Teaching could include:</b></p> <ul style="list-style-type: none"> <li>• Editing or updating existing entries.</li> <li>• Using simple filters.</li> <li>• Sorting data alphabetically or by date.</li> <li>• Using column headings effectively.</li> <li>• Checking entries for accuracy before saving.</li> </ul>
<p><b>Check digital information is accurate and make simple corrections:</b></p>	<p><b>Definition:</b> Reviewing digital information to ensure it is correct, complete and up to date, and making basic amendments where necessary.</p> <p><b>Teaching must include:</b></p> <ul style="list-style-type: none"> <li>• Reviewing digital entries for errors.</li> <li>• Identifying incorrect or incomplete information.</li> <li>• Making simple amendments e.g. correcting spelling, numbers or dates.</li> <li>• Saving changes after corrections are made.</li> <li>• Learner must demonstrate:             <ul style="list-style-type: none"> <li>○ Identifying at least one error.</li> </ul> </li> </ul>

	<ul style="list-style-type: none"> <li>○ Correcting the error independently.</li> </ul> <p><b>Teaching could include:</b></p> <ul style="list-style-type: none"> <li>• Checking information against a source document.</li> <li>• Using basic spellcheck or validation features.</li> <li>• Identifying duplicate entries.</li> <li>• Correcting formatting inconsistencies.</li> <li>• Peer-checking digital entries.</li> </ul>
<p><b>Digital business information needs to be kept secure:</b></p>	<p><b>Definition:</b></p> <p>Understanding why digital business information must be protected from unauthorised access, loss or misuse.</p> <p><b>Teaching must include:</b></p> <ul style="list-style-type: none"> <li>• The need to protect personal data.</li> <li>• Preventing financial loss.</li> <li>• Meeting legal or regulatory requirements.</li> <li>• Maintaining organisational reputation and trust.</li> <li>• Learner must identify: <ul style="list-style-type: none"> <li>○ At least two reasons why keeping digital information secure is important.</li> </ul> </li> </ul> <p><b>Teaching could include:</b></p> <ul style="list-style-type: none"> <li>• Real-life examples of data breaches.</li> <li>• Impact of poor security on customers or staff.</li> <li>• Links to data protection legislation.</li> <li>• Consequences of security failures e.g. fines, loss of business.</li> <li>• Difference between secure and non-secure handling practices.</li> </ul>
<p><b>Procedures to keep digital information confidential:</b></p>	<p><b>Definition:</b></p> <p>Following workplace processes and security measures to ensure digital information is only accessed or shared by authorised individuals.</p> <p><b>Teaching must include:</b></p> <ul style="list-style-type: none"> <li>• Using password protection.</li> <li>• Using secure login procedures.</li> <li>• Applying access permissions appropriately.</li> </ul>

	<ul style="list-style-type: none"> <li>• Locking devices when unattended.</li> <li>• Not sharing sensitive or confidential information inappropriately.</li> <li>• Learners must identify:             <ul style="list-style-type: none"> <li>○ At least two procedures used to keep digital information confidential.</li> </ul> </li> </ul> <p><b>Teaching could include:</b></p> <ul style="list-style-type: none"> <li>• Using multi-factor authentication.</li> <li>• Changing passwords regularly.</li> <li>• Using secure networks e.g. avoiding public Wi-Fi for sensitive work.</li> <li>• Encrypting files where available.</li> <li>• Logging out of systems after use.</li> <li>• Clear desk and screen practices.</li> </ul>
<p><b>Common risks to digital information.</b></p>	<p><b>Definition:</b> Typical threats or situations that could result in digital information being lost, accessed without permission, or misused.</p> <p><b>Teaching must include:</b></p> <ul style="list-style-type: none"> <li>• Risks from:             <ul style="list-style-type: none"> <li>○ Weak passwords.</li> <li>○ Phishing emails.</li> <li>○ Malware.</li> <li>○ Accidental sharing of information.</li> <li>○ Leaving devices unsecured.</li> </ul> </li> <li>• Learners must identify:             <ul style="list-style-type: none"> <li>○ At least two common risks to digital information security.</li> </ul> </li> </ul> <p><b>Teaching could include:</b></p> <ul style="list-style-type: none"> <li>• Social engineering tactics.</li> <li>• Clicking unsafe links or downloads.</li> <li>• Using unsecured public Wi-Fi.</li> <li>• Lost or stolen devices.</li> <li>• Failing to update software.</li> <li>• Sharing login details with others.</li> </ul>

<p><b>Work responsibly</b></p>	<p><b>Definition:</b> Acting in a professional and accountable way when handling digital business information to ensure it remains secure, accurate and confidential.</p> <p><b>Teaching must include:</b></p> <ul style="list-style-type: none"> <li>• Following organisational policies and procedures.</li> <li>• Reporting security concerns or incidents.</li> <li>• Logging out of systems when not in use.</li> <li>• Using secure networks when accessing business information.</li> <li>• Understanding personal responsibility when handling digital information.</li> <li>• Learners must explain: <ul style="list-style-type: none"> <li>○ What responsible behaviour looks like in practice when managing digital information.</li> </ul> </li> </ul> <p><b>Teaching could include:</b></p> <ul style="list-style-type: none"> <li>• Challenging unsafe practices appropriately.</li> <li>• Avoiding use of personal devices for sensitive work.</li> <li>• Not sharing passwords or login details.</li> <li>• Checking recipient details before sending information.</li> <li>• Maintaining professional conduct when using digital systems.</li> </ul>
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