



## Mastering Document Control and Management Outlines *From Fundamentals to Advanced Practices*

### **COURSE DESCRIPTION:**

The **Document Control Management** course provides comprehensive training on the principles and practices of managing documents within an organization. It covers core concepts of document control, including regulatory requirements, standards, and procedures for maintaining compliance and quality.

Participants will learn how to effectively classify, distribute, and manage both manual and electronic documents throughout their lifecycle.

The course also emphasizes the technical aspects of document management, such as coordination with contractors and vendors, and the development of skills necessary for career advancement in document control.

By the end of the course, attendees will be equipped to implement efficient document control systems, optimize review and approval processes, and ensure high standards of quality and compliance.

## TARGET AUDIENCE:

- **Document Control Professionals:** Individuals currently working in or aspiring to enter the field of document control, including document controllers, coordinators, and specialists.
- **Project Managers and Engineers:** Professionals who manage projects requiring robust document control, especially in industries like construction, engineering, oil & gas, and manufacturing.
- **Compliance and Quality Assurance Personnel:** Staff responsible for ensuring organizational adherence to regulatory and industry documentation standards, such as quality managers, auditors, and compliance officers.
- **IT and Information Management Professionals:** Individuals managing electronic document management systems (EDMS) and supporting IT infrastructure for document control processes.
- **Administrative and Support Staff:** Office managers, executive assistants, and clerical staff involved in maintaining records and managing documents.
- **Consultants and Trainers:** Professionals providing consultancy, training, or advisory services on document control and management processes.

## COURSE OBJECTIVES:

1. **Grasp Core Concepts:** Understand the fundamental principles of document control, including its importance, requirements, and the types of documents that need managing.
2. **Develop Effective Procedures:** Learn how to create, implement, and maintain document control procedures that align with regulatory requirements and industry standards.
3. **Improve Technical Skills:** Enhance skills in managing document lifecycles, classifications, and technical documentation, including coordinating with contractors, vendors, and other stakeholders.
4. **Optimize Distribution and Approval Processes:** Master best practices for controlled document distribution, tracking, review, and expediting approvals.
5. **Advance Career Development:** Explore career development opportunities for document control professionals, including training, certifications, and skill-building for career growth.
6. **Strengthen Information and Knowledge Management:** Learn to manage organizational information and knowledge effectively, ensuring accurate data capture, management, and utilization.



7. **Ensure Quality and Compliance:** Implement quality assurance practices to maintain high standards in document control, ensuring accuracy and adherence to compliance requirements.

## COURSE OUTLINES

### Day 1: Introduction to Document Control Management

#### **Session 1: Introduction to Document Control Concepts**

- Overview of Document Control
- Importance in Organizational Processes
- Key Terminology and Definitions

#### **Session 2: Requirements for Document/Records Control**

- Legal and Regulatory Requirements
- Standards (ISO, FDA, etc.)
- Establishing Control Mechanisms

#### **Session 3: Documents Classification**

- Types of Documents (Technical, Corporate, etc.)
- Classification Systems and Schemes
- Managing Sensitive and Confidential Information

### Day 2: Building an Efficient Document Control System

#### **Session 1: Document Control Procedures and Standards**

- Best Practices for Document Control Procedures
- Implementing Industry Standards
- Creating and Maintaining Document Control Procedures

#### **Session 2: Document Control Staff and Organization**

- Roles and Responsibilities of Document Controllers
- Structuring a Document Control Department
- Skills and Competencies for Effective Document Control

#### **Session 3: Document Controller Career Development Plan / Training**

- Career Pathways for Document Controllers
- Training Programs and Certifications
- Developing a Personal Career Development Plan



## Day 3: Technical Document Control

### **Session 1: Information and Knowledge Management**

- Distinguishing Between Data, Information, and Knowledge
- Managing Knowledge Assets
- Best Practices for Information Governance

### **Session 2: Document Identification, Types, and Lifecycle Management**

- Document Identification Systems
- Types of Technical Documents
- Document Lifecycle: Creation, Review, Approval, Distribution, and Archiving

### **Session 3: Deliverables List During Contract Phase and Master Document Register**

- Defining Deliverables and Their Importance
- Creating and Managing a Master Document Register
- Technical Data Required from Contractors

## Day 4: Document Distribution and Approvals

### **Session 1: Controlled Distribution and Distribution Metrics**

- Setting Up a Controlled Distribution System
- Tracking and Measuring Distribution Effectiveness
- Managing Document Access and Permissions

### **Session 2: Review and Approval Processes**

- Techniques for Effective Review and Approval
- Commenting and Annotations (CDRC, MS Word Track Changes)
- Expediting Approvals and Meeting Deadlines

### **Session 3: Final Documentation and Quality Checks**

- Final Documentation and As-Built Requirements
- Vendor Document Control and Coordination with Contractors
- Quality Checklists for Document Controllers