

Advanced Document Control Training Course Details

January 1, 2019

Overview

The Advanced Document Control training course is a 4-day course, encompassing the following:

- Mireaux's 3-day Fundamentals of Document Control course
- 1-day of Document Control concepts for Engineering and Project Management

The course is essentially three days of training on the basics of Document Control, plus one day of training in enhanced document control practices, focusing on the following:

- The establishment of a document management system, from creation of documents, to review, approval, and distribution of those documents.
- The commonalities of the various ISO and API standards and the specific requirements for control of documents and records.
- Process mapping techniques that lead to the creation of well-rounded procedures.
- The additional requirements associated with engineering and project management documents, such as Databooks, Transmittals, PI&D, Project Plans, etc.

The course is filled with practical exercises and real application examples, to help participants develop a hands-on understanding that will facilitate the implementation of a world-class document management system.

Learning Objectives

At the end of the course, participants should have the knowledge and understanding of the following concepts:

- The similarities and differences in regards to document control and record keeping, among the most widely used ISO and API standards.
- How to establish a document management system, including the creation, review, approval, saving, and the distribution of internal documents.
- The basic document control requirements and misconceptions that will empower participants to challenge their existing or legacy document management systems.
- How to map a process and create effective procedures that can be actively used.
- How to maintain and retain management system documentation, such as NCRs, Corrective Actions, Audit Plans and Reports, Management Review Meeting minutes, Calibration Certificates, etc.
- The structure and components of a Databook; the review and approval of such, as well as the distribution.
- How to maintain and retain project and engineering documentation, such as Project Plans, Project Reports, Engineering Drawings, P&ID, Transmittals, etc.

Prerequisites

The Advanced Document Control training course does not have any prerequisite courses.

This course has been designed for individuals with absolutely no previous knowledge of management systems or for those individuals who have inherited or been put in charge of document control but have no prior experience of management systems.

Course Materials

Students receive comprehensive course manuals with reference materials, including:

- Presentation slides
- Workshop exercises

Summary Agenda

- Management System Standards and Document Control
- Lifecycle of a Document
 - Creating a Document: Document Numbering, Document Revision
 - Review and Approval
 - Saving and Distribution
 - Improvement
- Obsolete Documents
- Process Mapping and creation of procedures
- Improving document content
 - Commonly Used Acronyms
 - Grammar
 - Lists
 - Punctuation
 - Format
 - Alignment
 - Spacing
 - Useful MS Excel and MS Word functions
 - Useful PDF functions
- Recordkeeping:
 - External Documents
 - Corrective Actions, NCRs, MOCs
 - Certificates of Calibration
 - Internal Audits, and Management Reviews Documentation
 - Databooks
 - Project plans, Project Documentation, Project Reports, Lessons Learned
 - Engineering Drawings, Transmittals
- Audit of the Document Control function
- Typical findings in the Document Control area

Duration and Class Hours

The duration of this course is four days, as follows:

- Day 1 8:30 AM to 4:30 PM
- Day 2 8:30 AM to 4:30 PM
- Day 3 8:30 AM to 4:30 PM
- Day 4 8:30 AM to 4:30 PM

Test and Certificate

This course has:

- A practical examination, completed and graded at various stages throughout the duration of the class.
- A final test, completed and graded at the end of the class.

A Certificate of Completion is provided to all participants at the end of the class.