

Advanced Document Control Training Course Details

September 24, 2020

Overview

The Advanced Document Control training course is a 4-day course that encompasses:

- Mireaux's 3-day Fundamentals of Document Control course
- 1-day exploring concepts common to ISO and API standards

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 Document Life Cycle and the requirements regarding Document Control.
- The implementation of a Document Management System, from defining the types of documents to be used in your organization, to the numbering, version, content writing, review, approval, distribution, training, and improvement of those documents.
- Process mapping and writing techniques that lead to the creation of well-rounded documents.
- Best practices associated with engineering and project management documents, such as Databooks, Transmittals, PI&D, Project Plans, etc.
- The commonalities of the various ISO and API standards and the specific requirements for control of documents and records.

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:

- How to establish a Document Management System, including the creation, review, approval, saving, and the publishing of internal documents.
- How to map a process and create effective procedures or work instructions.
- The basic document control requirements and misconceptions that will empower participants to challenge their existing or legacy Document Management Systems.
- How to maintain and retain project and engineering documentation, such as Project Plans, Project Reports, Engineering Drawings, P&ID, Transmittals, etc.
- The structure and components of a Databook; the review and approval of such, as well as the distribution.
- The similarities and differences in regards to document control and record keeping, among the most widely used ISO and API standards.
- How to maintain and retain management system documentation, such as NCRs, Corrective Actions, Audit Plans and Reports, Management Review Meeting Minutes, Calibration Certificates, 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 Document Management Systems who would like to develop a DMS on their own; or for those individuals with little to moderate knowledge who would like to enhance or improve upon their current DMS.

Course Materials

Students receive comprehensive course manuals with reference materials, including:

- Presentation slides
- Workshop exercises

Summary Agenda

- Introduction to Document Management System
- Document Life Cycle:
 - Select Document Templates
 - Assign Number and Version
 - Creating Content
 - Saving
 - Review and Approval
 - Publishing and Training
 - Improving Documents
- Control of Records
- External Documents
- Obsolete Documents
- Typical findings in the Document Management System
- Project Management
- Design and Development
- Drawings, Transmittals, and Databooks
- Management of Change
- Document Control and Record Keeping across Management Systems:
 - Policy
 - Objectives
 - Risk Assessment
 - Maintenance
 - Calibration
 - Training and Competency
 - Nonconformance (NCRs)
 - Internal Audits
 - Management Reviews
 - Corrective Actions

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.