

Advanced Document Control Training Course Details

November 15, 2021

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, P&ID, Project Plans, etc.
- The commonalities of the various ISO and API management system 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

By the end of the course, participants should have attained 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 regard to document control and record keeping, among the most widely used ISO and API management system 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.

Summary Agenda

The topics in this course include:

- 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
- Document Management System Compliance
- 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

Training Methods and Requirements

This course can be delivered via:

- Public Training via **Live Stream**
- Private Training at your facility, via **Live Stream**, or both

Live Stream Participants will need the following tools to effectively complete this course:

- Computer or laptop with MS Windows software or operating system compatible with MS Teams
- Audio and Visual equipment (i.e., webcam, microphone, headset, etc.)
- Strong Internet Connection

Course Materials

Participants will receive printed comprehensive reference material, including:

- Training Course Workbook
- Workshops

Live Stream: Training course material will be shipped to participants, 3-5 days prior to the start of training, to the shipping address provided at the time of registration.

In-Person: Training course material will be provided to participants on the first day of their arrival.

Duration and Course Hours

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

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

Successful Completion of Course and Test

Participants' successful completion of the course is determined by:

- Active participation and completion of workshops administered at various stages of the class.
- Completion of Test.

Certificate and Continuing Education Units (CEUs)

A Certificate of Completion is provided to all participants upon successful completion of the course. The Certificate awards a total of 2.8 CEUs to participants who attend the entire duration of the course and pass the Test with a minimum score of 70%.

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