

## Advanced Document Control Training Course Details

October 14, 2022

### 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 design of a DMS, from defining the types of documents to be used in your organization, to the numbering, version, approval, distribution, and training of those documents.
- Process mapping and writing techniques that lead to the creation of useful documents.
- Controlling changes to the DMS, such as issuing new documents, making updates or obsoleting documents.
- Best practices associated with engineering and project management documents, such as Databooks, Transmittals, P&ID, Project Plans, etc.
- Common requirements of the various ISO and API management system standards which impact the control of documents and records functions.

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 DMS, 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 (DMS)
- Designing a Document Management System:
  - Document Types & Sections
  - Language & Media
  - Formatting & Layout
  - Numbering & Version Control
  - Folder Structure & Access Rights
  - File Name & Saving
  - Creating Templates
  - External Documents
  - Control of Records
- Creating Content within the DMS
  - Understanding the needs
  - Interviewing & Process Mapping
  - Writing tools
- Controlling Changes to the DMS
  - Issuing new documents
  - Changing existing documents
  - Temporary deviations
  - Obsolescence
  - Review & Approval
  - Publishing & Training
- Document Management System Compliance
- Project and Engineering:
  - Project Management
  - Design & Development
  - Reading Drawings
  - Transmittals & Databooks
- Document Control and Record Keeping across Management Systems:
  - Policy & Objectives
  - Training & Competency
  - Risk Assessment
  - Maintenance & Calibration
  - Nonconformances (NCRs)
  - Internal Audits & Management Reviews
  - Corrective Actions

## Training Methods and Requirements

This course can be delivered via:

- Public Training via **Live Stream** or In-Person at the Mireaux Training Center located in Houston, TX (for select class dates)
- 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 comprehensive reference material, including:

- Training Course Workbook
- Workshops

## 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%.

### **Training Services Disclosure Policy**

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