Fundamentals of Document Control Training Course Details

October 14, 2022

Overview

The 3-day Fundamentals of Document Control training course is a one-of-a-kind course, designed and developed by Mireaux based on more than 18 years of creating, managing, and improving documentation for organizations around the world.

If you have been dealing with a Document Management System (DMS) but never received formal training, this course will help you debunk many of the myths surrounding Document Control. Regardless of the standard your organization complies or is certified to, once you attend our Fundamentals of Document Control course, you will feel empowered to improve your own system and question the status quo.

If you are new to the world of Document Control and the ISO or API standards, you will be amazed at the vast knowledge you will gain upon completion of this course.

This remarkable course touches on the following areas:

- 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.

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 DMS.
- 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.

Prerequisites

The Fundamentals of 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
    - Obsoletion
    - Review & Approval
    - Publishing & Training
- Document Management System Compliance
- Project and Engineering:
    - Project Management
    - Design & Development
    - Reading Drawings
    - Transmittals & Databooks

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 three 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)

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 2.1 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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