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Document Controlling and Information Management Training Course

Introduction:

Managing documents, records and content can be difficult. How do you best capture, manage and store the documents and records in your organization? Does your approach meet compliance requirements, regulations and standards? What is the best way to manage emails, web pages and electronic documents and records? How do you find the right documents and records when you need them? How does workflow and business process management work with documents and records management to help increase efficiency within your company?

This programme covers the strategies, tools, and technologies used to capture, categories, manage, store, preserve (archive), and deliver documents and records in support of business processes. In this programme you will learn how to:

- Understand the key concepts and overall architectural scope
- Develop business cases and business requirements
- Use the concepts of document and records management to deliver business drivers
- Link how document and records management can be implemented across your organization
- Explore the implications of an Enterprise Content Management (ECM) strategy in conjunction with document and records management

Who Should Attend?

This programme will prove to be a useful and productive for all those who are interested in understanding document and records management and how it can be implemented successfully. It will be of benefit to:

- IT Management
- Technical staff
- Document and Records Management personnel
- Document Management Supervisors
- Suppliers, Solution Providers and Vendors
- Executives
- Users of Document and Records Management
- Personnel seeking to enhance their skills

Objectives

This course will give each participant a professional foundation within technical document control, and will focus on relevant practical issues.

- Explain the requirements for document control traceability, auditability, quality and consistency
- ISO 9001:2008 regulatory requirements and common client requirements and security
- Understand the role of document controller and his/her interfaces
- List out and perform the critical quality checks to run on technical documentation
- Understand what a deliverable is and how it is managed

- Ensure traceability of documents, comments, distribution and transmittals
- Understand and explain the requirements of electronic document management system (EDMS)
we will cover numbering, registration, distribution and auditing follow-up for various types of documents through the different phases of projects up to and including final documentation.

By the end of the course, participants will have a solid understanding of technical documentation management.

Contents:

- **Module 1 Document control managements**
 1. Introduction for Document control concepts
 2. Requirements for documents / records control
 3. Documents classifications
 4. Technical document control
 5. Corporate document control
- **Module 2 How to build efficient document control?**
 1. Document control procedures / standards
 2. Document control staff and organization
 3. Document controller career development plan / training
 4. Manual and electronic document control comparison
- **Module 3 Technical document control**
 1. Information and Knowledge Management

2. Document identifications and types
3. Life cycle data management
4. Deliverables list during contract phase
5. Master Document Register
6. Technical data required from contractors
7. Interface with contractors and subcontractors
8. Vendor document control
9. Final documentation / As built
10. Document controller quality check lists

- **Module 4 Document distribution and approvals**

1. Controlled distribution
2. Distribution metrics
3. Review and approval commenting by annotations / CDRC / MS Word track changes
4. Expediting / meeting deadlines
5. Transmittals

- **Module 5 Management of change MOC**

1. Type of MOC
2. Organization MOC
3. Technical MOC
4. As built

- **Module 6 Planning for Electronic Document Management System (EDMS) Project**

1. Business Case & Situation Analysis
2. Gap analysis

3. Business requirements
4. Functional requirements
5. Selection / evaluation

- **Module 7 Implementing EDMS**

1. System infrastructure
2. Folder structure
3. Defining document attributes/ Metadata
4. Revisions and versioning
5. Transmittals
6. Search and retrieval
7. Workflow management / Business Processes Management (BPM)
8. Integrations
9. Document capturing
10. Scanning and OCR
11. Audit trails

Question and Answers