



Beyond the Basics. Beyond the Job.  
Your Professional Journey Starts with  
Us.

## Sri Lanka Document Controllers Academy

# PROFESSIONAL DOCUMENT CONTROL MANAGEMENT SYSTEM

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# Module 1 – Introduction to Document Control

- Introduction of Document
- Document lifecycle & process
- Explaining Document Control
- Definition, importance of document control in industries
- Different Roles in Document Control
- Responsibilities of a Document Controller

## General Overview:

In this module, students will gain a foundational understanding of documents and the concept of document control. They will learn why document control is essential in industries, how documents move through their lifecycle, and the key roles and responsibilities involved in managing them. This knowledge will provide the base for applying document control practices in real workplace situations.

## Subtopics & Learning Focus

- **Introduction of Document**  
Students will learn what a document is, its forms, and why documentation is important in professional environments.
- **Document Life-cycle & Process**  
Learners will explore the different stages a document goes through from creation to archiving and how each step is managed.
- **Explaining Document Control**  
Students will understand the meaning of document control, its purpose, and how it ensures accuracy and efficiency in organizations.
- **Definition, Importance of Document Control in Industries**  
This section highlights the value of document control in maintaining compliance, preventing errors, and supporting quality systems.
- **Different Roles in Document Control**  
You'll learn about all the people involved, like the person who create Doc to until approval & different jobs & Level in document control career.
- **Responsibilities of a Document Controller**  
This subtopic introduces the role of a Document Controller, outlining their duties in managing, distributing, and safeguarding documents.

## Module 2 – Document Types & Document Management

- Document Control industries
- Types of documents (technical, quality, legal, HR, finance, etc.)
- Document Register/Log
- Hard Copy Management
- Soft Copy Management

### General Overview:

In this module, students will learn how documents are classified and managed within different industries. They will understand the importance of organizing documents properly, keeping accurate records, and ensuring both hard copy and digital documents are maintained effectively. This module builds practical skills in handling and controlling various types of documents.

### Subtopics & Learning Focus

- **Document Control Industries**  
Students will discover in which industries document control plays a key role and why it is essential for compliance, safety, and efficiency.
- **Types of Documents (technical, quality, legal, HR, finance, etc.)**  
Learners will get familiar with the common categories of documents used in workplaces, each serving specific functions such as quality assurance, legal compliance, financial tracking, or HR processes.
- **Document Register/Log**  
This section introduces the concept of a document register or log, showing students how documents are recorded, numbered, and tracked for easy retrieval and traceability.
- **Hard Copy Management**  
Students will learn about methods for managing physical documents, including filing systems, labelling, storage security, and access procedures.
- **Soft Copy Management**  
Learners will explore digital document management practices, such as electronic filing, naming conventions, version control, and the use of software systems.

## Module 3 – Document Control Processes

- Document numbering system, versioning, revisions
- Metadata, indexing, file naming conventions
- Distribution methods (hard copy vs. digital)
- Document security, confidentiality, and access control

### General Overview:

In this module, students will learn about the practical processes involved in controlling documents. They will understand how documents are numbered, updated, and tracked, as well as how they are distributed and protected. This module provides essential knowledge of the systems and standards that keep document management consistent, secure, and reliable.

### Subtopics & Learning Focus

- **Document Numbering System, Versioning, Revisions**  
Students will study how documents are uniquely identified, updated through versions, and revised to maintain accuracy and avoid confusion.
- **Metadata, Indexing, File Naming Conventions**  
Learners will explore how documents are labelled and organized using metadata, indexing methods, and consistent naming rules for easier search and retrieval.
- **Distribution Methods (Hard Copy vs. Digital)**  
This section teaches how documents are distributed, comparing traditional hard copy circulation with faster and more controlled digital distribution methods.
- **Document Security, Confidentiality, and Access Control**  
Students will understand the importance of protecting sensitive information by applying access rights, confidentiality protocols, and security measures in both paper and electronic systems

## Module 4 – Document Management Systems (DMS)

- Overview of electronic systems (Aconex, Inaxus, SharePoint, EDMS, etc.)
- Digital transformation of document control
- Practical exercises with free/open-source DMS

### General Overview:

In this module, students will explore modern electronic systems used to manage documents effectively. They will understand how digital platforms have transformed document control practices, making processes faster, more secure, and accessible. Students will also gain hands-on experience by practicing with free or open-source DMS tools.

### Subtopics & Learning Focus

- **Overview of Electronic Systems (Aconex, Inaxus, SharePoint, EDMS, etc.)**  
Students will be introduced to popular document management platforms used in industries, learning their key features and applications.
- **Digital Transformation of Document Control**  
Learners will understand how traditional paper-based control has shifted into digital systems, improving efficiency, collaboration, and global accessibility.
- **Practical Exercises with Free/Open-Source DMS**  
This section gives students the chance to practice real document control tasks using free or open-source software, building confidence in applying DMS tools.

## Module 5 – Records Management & Archiving

- Retention schedules and archiving policies
- Digital vs. physical storage best practices
- Legal implications of poor record-keeping
- Project Handover

### General Overview:

In this module, students will learn how organizations manage records and ensure proper archiving. They will explore policies for retaining documents, compare digital and physical storage methods, and understand the legal risks of poor record-keeping. The module also covers how records are organized and transferred during project handover.

### Subtopics & Learning Focus

- **Retention Schedules and Archiving Policies**  
Students will study how long different types of documents should be kept and the policies organizations follow for archiving them securely.
- **Digital vs. Physical Storage Best Practices**  
Learners will compare methods for storing documents electronically and in hard copy, focusing on efficiency, security, and accessibility.
- **Legal Implications of Poor Record-Keeping**  
This section highlights the risks and consequences of not maintaining proper records, including compliance issues, penalties, and loss of business reputation.
- **Project Handover**  
Students will understand how records are prepared, organized, and transferred at the end of a project to ensure continuity and accountability.

## Module 6 – Standards, Quality & Compliance

- Role of Document Control in audits (internal & external)
- International standards: ISO 9001, ISO 27001, ISO 15489 (Records Management), GDPR basics
- Compliance with ISO/industry standards
- Case studies: construction, IT, government

### General Overview:

In this module, students will understand how document control supports quality management, audits, and compliance with international standards. They will gain knowledge of key ISO frameworks and data protection requirements, and see how compliance is applied across different industries through real-world case studies.

### Subtopics & Learning Focus

- **Role of Document Control in Audits (Internal & External)**  
Students will learn how document control ensures readiness for audits by keeping records accurate, traceable, and easily accessible.
- **International Standards: ISO 9001, ISO 27001, ISO 15489 (Records Management), GDPR Basics**  
Learners will be introduced to global standards for quality, information security, and records management, as well as basic data protection regulations.
- **Compliance with ISO/Industry Standards**  
This section shows how organizations align document control practices with ISO and industry-specific requirements to maintain credibility and avoid non-compliance.
- **Case Studies: Construction, IT, Government**  
Students will review practical examples of how document control standards are applied in different sectors, helping them connect theory with workplace realities.

# Module 7 – Evolution of AI in Document and Content Management

- Key Benefits of AI for Efficiency, Accuracy, and Collaboration
- ChatGPT & Gemini
- Microsoft Copilot – AI Inside Word, Excel, and Teams
- Voice-to-Text AI- Otter.ai, Fireflies

## General Overview:

In this module, students will explore how Artificial Intelligence (AI) is transforming document and content management. They will learn the benefits AI brings to efficiency, accuracy, and collaboration, and gain awareness of popular AI tools being integrated into workplace systems. This module highlights how emerging technologies are shaping the future of document control.

## Subtopics & Learning Focus

- **Key Benefits of AI for Efficiency, Accuracy, and Collaboration**  
Students will understand how AI reduces manual effort, improves precision in managing documents, and enhances teamwork through smart automation.
- **ChatGPT & Gemini**  
Learners will be introduced to advanced AI platforms that assist with content generation, summarization, and information management.
- **Microsoft Copilot – AI Inside Word, Excel, and Teams**  
This section explains how Microsoft integrates AI into everyday office tools, helping professionals draft, edit, analyze, and collaborate more effectively.
- **Voice-to-Text AI – Otter.ai, Fireflies**  
Students will discover how voice-to-text AI tools capture meeting notes, transcribe conversations, and improve documentation speed and accuracy.

## Module 8 – Communication & Soft Skills

- Professional communication for document controllers
- Team coordination & stakeholder management
- Problem-solving in high-pressure environments

### **General Overview:**

In this module, students will develop the professional communication and interpersonal skills required for effective document control. They will learn how to coordinate with teams, manage stakeholders, and handle challenges in high-pressure situations. This module emphasizes the human side of document control, complementing the technical skills gained in earlier modules.

### **Subtopics & Learning Focus**

- **Professional Communication for Document Controllers**  
Students will practice clear and professional communication, including email etiquette, reporting, and correspondence within organizations.
- **Team Coordination & Stakeholder Management**  
Learners will understand how to work with different teams and stakeholders, ensuring smooth document flow and collaboration across departments.
- **Problem-Solving in High-Pressure Environments**  
This section equips students with techniques to stay calm, organized, and solution-focused when facing urgent requests, deadlines, or document-related issues.

## Module 9 – Practical Workshops

- Hands-on projects (setting up a document control system for a mock company)
- Using templates for registers, transmittals, logs, reports
- Simulated audit preparation

### General Overview:

In this module, students will apply the knowledge and skills learned throughout the course in hands-on exercises. They will practice setting up a document control system, using standard templates, and preparing for audits in a simulated environment. This module bridges theory and practice, giving learners real-world experience in document management.

### Subtopics & Learning Focus

- **Hands-on Projects (Setting up a Document Control System for a Mock Company)**  
Students will design and implement a complete document control system, practicing tasks such as document registration, version control, and workflow management.
- **Using Templates for Registers, Transmittals, Logs, Reports**  
Learners will gain experience using pre-designed templates to maintain organized records and streamline document processes.
- **Simulated Audit Preparation**  
This section allows students to prepare for internal and external audits in a controlled setting, learning how to demonstrate compliance and readiness effectively

## Module 10 – Assessment

- Quizzes, assignments, case studies
- Final project: design and present a document control procedure for a real-life scenario

### General Overview:

In this module, students will be evaluated on their understanding and application of document control concepts. Assessments include quizzes, assignments, and case studies, culminating in a final project where learners design and present a document control procedure for a real-life scenario. This module ensures that students can confidently apply their knowledge in practical situations.

### Subtopics & Learning Focus

- **Quizzes, Assignments, Case Studies**  
Students will be tested on key concepts through multiple-choice quizzes, written assignments, and analysis of real-world scenarios.
- **Final Project: Design and Present a Document Control Procedure for a Real-Life Scenario**  
Learners will create a comprehensive document control procedure, demonstrating their ability to organize, manage, and control documents effectively, and present their solution for evaluation.

**Sri Lanka  
Document Controllers Academy**

**Thank You!!!**