



DOCUMENT CONTROLLER &



MANAGEMENT TRAINING

DOCUMENT CONTROLLER & MANAGEMENT

Course Objectives

By the end of this training, participants will be able to:

- Champion best practices in understanding their requirements and benefits
- Explain the requirements for their traceability, auditability, quality, and consistency
- Benchmark their current practices against best practices
- Understand the role of the document controller , his/her interfaces, the boundaries of the profession
- Identify possible improvements to their current practices/system and contribute more effectively to the success of their organization.
- Understand the theory and rationale behind Document Control practices
- Be more proficient and effective in daily Document Controller tasks and activities.



Target Audience

Professionals (Beginners or experienced) who wish to understand best practices and to gain, improved, formalize and certify their knowledge.

Units to be covered

Unit 1: Introduction to Document Control

- What is document control
- Role and tasks of a document controller

Unit 2: The basis of document control

- Document control checks
- Gatekeeping

Unit 3: Document Identification



- How to make sure that documents are identifiable
- Means of identification (numbering, metadata, document description, file naming

- Document classification / security

Unit 4: How to organize documents

- Filing structures

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- Managing information security and confidentiality

Unit 5: Document Life Cycle

- Steps of the document lifecycle
- Document creation, modification, review cycle, approval. How to manage documents at each stage of their life
- How to avoid misuse of obsolete documents

Unit 6: Document Distribution

- How to ensure an efficient and relevant distribution of documents
- Means and tools for document distribution
- Transmission sheets

Unit 7: Project Document Control

- Specifics of Project Document Control
- Managing Deliverables
- Interactions with clients, contractors, subcontractors, suppliers, vendors, etc.
- Master Deliverable Register (MDR)

Unit 8: As –Built and Final Documentation

- Why we need procedures
- Content to be covered in Document Control Procedures

Unit 9: Electronic Document Management Systems



- Benefits and capabilities of Document Control Software packages / EDMS

Unit 10: Interactions with Technical Teams and Users

- How to support users and technical teams
- How to manage work pressure and manage difficult situations

Train. Equip. Perfect