

The management of documents is at the heart of every project, yet until now there has been no training to support those who work in it. This training focuses on the principles underlying the function in order to be transferable across companies

## **LEARNING OUTCOMES**

On completion of the course learners should be able to:

- Understand the project life cycle and the role and function of Document Management within it.
- Understand the procedures for document control which need to be written at the start of a project and the factors to be considered when writing them.
- Understand how to run Document Management on a project from a technical perspective.
- Understand the document control requirements for project closure and handover.

## **TRAINING METHOD**

This course is highly interactive and demands the full participation of the delegates to ensure they receive the maximum benefit.

There will be group discussion sessions throughout the day to engage in discussion and use the tools and techniques of the process.

## **COURSE DELIVERY**

1. CLASSROOM (Open course schedule) - 2-day course.
2. IN-HOUSE - (at your location - minimum numbers may apply).

## **CONTACT US:**

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## **WHO SHOULD ATTEND?**

Participants will already be experienced Document Controllers and familiar with carrying out the activities of document management. They should have a minimum of two to three years' experience, preferably on two or three different aspects of the project life cycle.

This is a two day classroom based course consisting of four modules which could be split into different days if required.

## **COURSE CONTENTS**

### **Setting the Scene**

- Understanding Document Management and the role it plays in projects.
- Understanding Projects and Documents within the project and the project lifecycle.
- Document Management Systems

### **Understanding the Requirements**

- Understand Project/Company requirements and the types of documents to be controlled.
- Consider quality legal and contractual requirements for document control.

### **Setting up Project Processes**

- Methods and tools for managing documents.
- Interfacing with 3rd Parties and the contract types that can be used to do so.
- Writing Effective Procedures/ Workflows
- Document communication and distribution methods.
- Matching document procedure to project changes.
- Effective Reporting and record keeping, aligned with project requirements.
- Configuration management.
- Using KPIs to monitor performance and improve the function
- Handover and Creating Packages
- Using the lessons learned process

### **Leading the Document Management Function**

- Role of the Leader
- Manage The Function (from a technical standpoint)



Engineering Construction Industry Training Board

APPROVED PROVIDER

## **OVERVIEW**

This course is delivered in partnership with The Engineering and Construction Industry Training Board (ECITB).

The management of documents is at the heart of every project, yet until now there has been no training to support those who work in it. Document management processes are different on every project, due to the need to integrate the document management requirements of client, contractor and major vendors/ subcontractors.

This training focuses on the principles underlying the function in order to be transferable across companies.

This is an initial training course for Document Managers and potential Document Managers on projects within the engineering construction industry.

**ECITB Training Provider  
of the Year 2015**

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