

Course Overview

The management of documents is essential to all projects. The aim of this course is to help delegates to develop their understanding of how to set up, implement and close out document management on a project.

Accordingly, the course consists of four modules: *Setting the Scene*, *Definition*, *Implementation* and *Handover and Closeout* that follow a typical project life cycle.

The underlying principles for the function are considered, based on a *real-world* engineering construction project scenario, in which the document management processes and requirements of client, main contractor, sub-contractors and major vendors must be integrated.

Course Style

Course style is virtual instructor led. Delegates are provided with access to the GO FORTH Microsoft Teams environment that is specially configured for enhanced collaboration. The rich and high-quality interactive virtual learning workspace helps replicate the physical classroom environment, whilst providing all the advantages of a structured virtual learning environment

Course Duration

3 x 4 ½ -hour virtual days (9.00am to 1.30pm) = **13.5 hours**

Course Content

- Project lifecycle & contract types
- Role of document management
- Quality, legal and contractual requirements
- Methods and tools for controlling documents.
- Types of procedures and workflows needed.
- Document communication and distribution
- Changing procedures to suit project changes
- Project reporting and records
- Configuration management
- Project handover and closeout
- Using KPIs to improve the function.
- Using lessons learned processes

Who Should Attend?

Document Managers (or equivalent), potential Document Managers, Document Controllers and others, such as Information Managers, Procurement Staff, Administration Staff, Office Managers, Technical Clerks

Learning Objectives

- Understand the project life cycle and the role and function of Document Management
- Understand the procedures 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 requirements for project closure and handover.

Assignments

Delegates are required to complete a pre-course assignment (on how Document Management is handled within your own organisation and two post-course assignments to produce a detailed Document Management Procedure document for the 'real world' engineering construction project scenario.

Certification

Those who successfully complete the course and assignments (requires overall score 70%), will receive a Certificate of Achievement.

***ECITB grant support may be available to member companies,
please contact your account manager to discuss your requirements.***

To arrange a course or placement or find out more

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