CONCEPT

Document Controller Course: EDMS, Transmittals, Revision Control and Project Records



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Introduction:

Document controller training covering EDMS, transmittals, revision control and project records is a 1-week course for document control, project administration, engineering records and vendor documentation staff, ending with a Project Document Control Procedure and Master Document Register. On many projects drawings are issued at the wrong revision, comments are lost between reviewers and handover dossiers arrive incomplete, which delays construction, approvals and asset handover. Nominees already register, issue or file project documents and practise on case studies drawn from engineering, construction and facilities projects. CoreConcept Training Center delivers this document controller course.

Course Objectives:

- Apply document numbering, metadata and classification rules consistently across a project or organisation
- Set up EDMS folders, workflows and access rights that match the project's review and approval cycle
- Issue, receive and track transmittals and submittals with correct revision and status codes
- Maintain a master document register and vendor document requirements list from first issue to final as-built
- Control review comments, supersession and correspondence so that only current documents reach site and suppliers
- Assemble handover dossiers and apply retention and audit checks based on ISO 15489-1:2016 records principles

Target Audience:

- Document control staff responsible for registering, issuing and tracking project documents
- Project administrators responsible for correspondence, submittals and meeting records
- Engineering records staff responsible for drawings, revisions and as-built files
- Vendor documentation staff responsible for supplier document submissions and returns
- Quality and records staff responsible for document audits and retention schedules

Course Outline:

Day 1: Document Control Foundations and the Project Document Life Cycle

- Document Controller Roles Within Project and Organisation Structures
- Project Document Life Cycle From Creation to Archive
- Document Types, Deliverables and Correspondence Classification
- Document Numbering Schemes and Metadata Field Definitions
- Current-State Document Control Health Check Template

Day 2: Standards, Registers and EDMS Architecture

- ISO 15489-1:2016 Records Principles Applied to Project Documents
- Master Document Register Structure and Required Fields
- Vendor Document Requirements List Setup and Supplier Codes
- EDMS Folder Structure, Access Rights and Naming Rules
- Revision Schemes and Status Codes for Review and Construction

Day 3: Daily Document Control Operations

- Transmittal Preparation, Distribution Matrix and Acknowledgement Tracking
- Submittal Review Cycle and Comment Return Codes
- Incoming Document Registration and Quality Checks
- Supersession Control and Withdrawal of Obsolete Revisions
- Correspondence Logs, Letters and Meeting Minutes Filing

Day 4: Vendor Documents, Problem Cases and Control Improvement

- Vendor Document Overdue Tracking and Expediting Reports
- Conflicting Revisions and Duplicate Numbering Resolution Methods
- Document Control KPIs and Weekly Status Reporting
- Document Audit Checklist and Non-Conformance Follow-Up
- Retention Schedule and Disposition Rules for Project Records

Day 5: Case Study Practice and the Document Control Procedure

- Case Study on a Drawing Issued at the Wrong Revision
- Case Study on Late Vendor Documents Delaying Fabrication
- As-Built and Handover Dossier Assembly Exercise
- Master Document Register Build for a Sample Project
- Project Document Control Procedure Completion and Peer Review

Skills You Will Gain:

- Document Numbering
- Metadata Management
- EDMS Workflow Set-Up
- Transmittal Management
- Revision Control
- Vendor Document Expediting
- Handover Dossier Preparation
- Records Retention

Why Attend This Course:

- Deliver a Project Document Control Procedure and Master Document Register to the project manager and the document control lead
- Decide which revision and status a document carries before it is issued to site, suppliers or the client
- Avoid rework, approval delays and incomplete handover caused by superseded drawings, lost comments and late vendor documents
- Train colleagues on the numbering rules, transmittal steps and register fields practised during the case studies

Conclusion:

Back at work, the participant gives the Project Document Control Procedure and Master Document Register to the project manager, the engineering leads and the document control team. They use them to agree numbering rules, issue documents through one transmittal route and track every deliverable and vendor document to final status. After the first month of use, the project should review overdue documents, rejected submittals and audit findings against the register and adjust the procedure where documents still slip.

Frequently Asked Questions FAQ:

What should participants know before a document controller course on EDMS and transmittals?

Participants should already register, issue or file documents on a project or in an organisation. Bringing an anonymised document register, a transmittal sample and the current numbering procedure helps them apply the case studies to their own work.

How does a document controller course differ from a general records management course?

This course concentrates on live project documents: numbering, transmittals, revisions, vendor documents and handover. A records management course concentrates on organisational records policy, classification schemes and long-term retention across all business functions.

Why do document controllers need strict revision control on projects?

Strict revision control makes sure site teams, suppliers and reviewers always work from the current approved document. Without it, superseded drawings reach construction or fabrication, which causes rework, disputes and delays that are expensive to correct.

What do participants take back from the document controller course?

Participants take back a Project Document Control Procedure and a Master Document Register for a sample project, with numbering rules, status codes, transmittal steps, KPIs and a handover checklist they can adapt to their own project or organisation.