



Project Document Managers' Course

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Overview

This course has been produced by the ECITB as a result of a request from employers across the Engineering Construction Industry (ECI). The content has been developed by a subject specialist to meet a specification agreed by an Industry Working Group made up of employer representatives from the engineering construction industry.

Document Manager is the title of the individual who leads the Document Management process on a project (the actual title may vary between companies). This is an initial training programme for Document Managers and potential Document Managers. 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 projects covering different aspects of the project life cycle.

Course Aims

The aim is to enable an individual to understand the requirements for setting up, running and closing down Document Management on a project. Training focuses on the principles underlying the function in order to be transferable across companies.

Learning Objectives

On completion of the course learners should be able to:

- 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 (ie not Leadership)
- Understand the requirements for project closure and handover

Course Duration

The course is delivered either face to face or virtually, and consists of four half-day modules which can be delivered as a two day course or split as appropriate.

Certification

There are assignments to be completed by delegates before and after the course. Those who successfully complete the course and assignments will receive a Certificate of Achievement.

Course Content

During the course the following content will be addressed:

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

ECITB grants are available to Registered Employers.

To book a course, or a course place, and to confirm grant availability, please discuss your requirements, in the first instance, with your ECITB Account Manager.



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