

# Information Matters™

## Document Control Essentials

Understand the value of your document control activities & apply best practices to develop a robust document control framework

Public and in-house presentations

Two day training course, workshop and knowledge exchange

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## About your course facilitator



Nigel Loadman is a Senior Information Management Consultant with over 30 years experience.

Capitalise on our expert knowledge to understand key issues:

**OVERSEE** the issues and challenges faced by document controllers in the oil and gas sector

**RECOGNISE** the key components of an excellent document control programme

**UNDERSTAND** how to resolve issues using document control best practice methodology

**IDENTIFY** different types of risks facing the oil and gas sector and understand how to reduce risk through good practice

**EXAMINE** carefully selected case studies to understand how poor document control contributes to failures and accidents

**ACQUIRE** practical tools and techniques to reduce the risk of improvement failure

**DISCUSS** the most common reasons for poor document control and how to improve the process

## Programme schedule

Day one - Day two

09:00	Register
09:30	Morning session begins
11:00 – 11:15	Refreshments and networking break
13:00	Lunch
13:45	Afternoon session begins
15:00 – 15:15	Refreshments and networking break
16:30	Course ends

Nigel has a degree in oil exploration and a masters degree in records management and has worked in various industry sectors where document control plays a critical role.

Nigel has considerable hands on experience of various records management subject areas and has a comprehensive understanding of the needs and requirements of effective document control systems having spent most of his career working within environments where document control plays a significant role.

His main area of interest, focus and specialism throughout his career has been the governance and control of critical documents and records and has written corporate strategies focussing on such diverse areas as enterprise content management, records management, information governance and digital asset management.

More recently Nigel has managed a team of 76 records professional and transitioned the team from 11 locations spread across the UK into one national centre containing over 4 million engineering drawings and other controlled documents. Nigel and his team were subsequently awarded "records management team of the year" by the records management society.

Nigel's drawing control and standards management experience extends throughout his career and has both established and maintained document control standards and processes that were audited and certified by such authorities as the FDA and BSI.

He also has a thorough understanding of document control issues, standards management across large diverse organisations together with the legislative requirements for document control.

Nigel's wealth of experience managing records in controlled environments makes him ideally placed to introduce the concepts of document control and provides him with the opportunity to draw from numerous examples and scenarios that he has encountered over the years enriching the learning experience.

## Workshop overview

The importance of effective document control within the oil & gas sector is widely underestimated, yet in many cases it can be the critical factor determining success or failure of a company initiative. This exponential data growth and increasing methods of capturing and communicating information presents a considerable challenge for companies to develop good document control frameworks to remain competitive in the marketplace.

This 2 day workshop has been designed to help oil and gas company staff recognise the importance of document control and understand the issues and challenges of controlling documents in regulated environments.

With time-proven methodologies and techniques, the course facilitator, Nigel Loadman, will help the delegates understand the key document control issues and introduce methods to improve the key processes.

The course will also highlight the different types of risks facing the oil and gas sector and provides guidance on mitigating those risks through effective document control.

This workshop is highly practical and informative. It introduces a number of methods and techniques that could form the basis of the delegates' own document control activities. It also provides case histories and access to the experience of one of the leading experts in this field.

## Why should you attend

This workshop introduces the fundamentals of document control good practice. After introducing the basic concept of document control, the workshop develops the concepts, discusses the risks and issues, requirements for an effective system and ways to improve the current document control processes within your organisation.

At the end of this workshop delegates will leave with a thorough understanding of the need and concepts of document control and how to create document control process that can impact the successful management and operation of an effective asset rich environment.

## Who should attend

Attendance at this workshop would be ideal for:

**New starters** who need to gain a clear understanding of the need, benefits and method of document control process and procedures

**Members of project teams** who require access to controlled documents

**Any employee** who would benefit from a greater understanding of the impact of document control, the part they play in the existing document control process and the benefits of implementing effective document control

To register your attendance please contact Nigel Loadman:  
[nigel.loadman@tribalgroupp.com](mailto:nigel.loadman@tribalgroupp.com)

## Programme schedule

### Day one

#### Issues and challenges

This section introduces the concepts and definitions of documents, records and document control, and explains the differences in the different terms. It also takes time to describe how documents are controlled in different industries as well as outlining the aims and objectives for the workshop

#### Risks, issues and consequences

This section provides an overview of the risks, issues and consequences faced by document controllers in the oil and gas sector.

- Case studies of poor document control across regulated industries
- The risks and consequences of poor document control

#### Document and records management essentials

This section introduces all of the key components of a document and records management programme, including:

- Physical and electronic document management
- Classification schemes and file plans
- Retention & disposal schedules
- Vital records and business continuity
- Electronic records management
- Email management
- Storage and disposal

### Day two

#### What needs to be controlled

This section introduces the critical activities that support document control. Key topics covered:

- Revision control
- Document numbering
- Impact of external regulation
- Configuration management

#### Components of a document control system

This section identifies the key components used in document control including:

- Document control manual
- Master document register
- Standards and work instructions
- Distribution matrix
- Transmittals
- Master documents

#### Managing deliverables

This section explains how to control documents in both project and operational environments. Key topics include:

- Handover of project information
- Managing vendor documentation
- Document control in an operational environment
- Managing an MOC process

#### What help can you get?

This section highlights the different forms of help and advice you can get when you are starting off in document control.

- Industry specific standards
- Subject specific standards
- Benchmarking
- Professional associations and societies
- Qualifications

#### Document control case study

This section provides students with the opportunity to hear a detailed case study that clearly demonstrates the consequences of poor document control.