

DOCUMENT CONTROL SPECIALIST



GENTEX[®]

TRAINING CENTER



Introduction

In regulated and technical environments, the document is the evidence. A drawing at the wrong revision, an unapproved procedure, or a form with no signature trail can invalidate work and expose an organization to serious risk. This Document Control Specialist Training Course prepares participants to own that responsibility professionally. Furthermore, it covers document numbering, revision control, distribution, transmittals, registers, approval workflows, and audit readiness across technical and administrative environments. Participants also learn to work within EDMS platforms and quality management systems. As a result, they leave able to run document control that holds up to any audit.

Document Control Specialist Course Objectives

- Apply document control principles across the document lifecycle.
- Build numbering systems, registers, and revision conventions.
- Control revision status for drawings, procedures, and specifications.
- Manage distribution lists, transmittals, and acknowledgment records.
- Administer approval workflows and signature authority.
- Apply ISO 9001 document control requirements and quality system practice.
- Manage EDMS platforms, metadata, and permissions.
- Ensure legal admissibility and evidence integrity for controlled documents.
- Support audits, inspections, and client documentation requirements.
- Measure document control performance with accuracy and timeliness indicators.

Course Methodology

- Interactive workshops built around real controlled document sets.
- Guided practice in numbering, registers, and transmittal preparation.
- Revision control and distribution exercises with live documents.

LEARN BOLD. LEAD BEYOND

GENTEX Training Center LLC | Orlando - FL, USA
Info@gentextraining.com



- Simulation of an audit and document retrieval request.
- Case studies from engineering, construction, healthcare, and energy.
- Action planning that links each practice to the participant's own function.

Who Should Take This Course

- Document controllers and document control officers.
- Project and engineering document coordinators.
- Quality assurance and QMS documentation staff.
- Technical records and drawing office personnel.
- Administrative staff assigned document control duties.
- IT and EDMS administrators supporting document workflows.

Document Control Specialist Course Outlines

Day 1: Document Control Foundations

- Defining document control and its role in compliance.
- Explaining the document lifecycle from creation to obsolescence.
- Applying ISO 9001 documented information requirements.
- Understanding quality management system documentation tiers.
- Identifying risks created by uncontrolled documents.
- Assessing current document control maturity.
- Completing a personal document control audit.

Day 2: Numbering, Registers, and Revision Control

- Building numbering schemes for documents and drawings.



LEARN BOLD. LEAD BEYOND

GENTEX Training Center LLC | Orlando - FL, USA
Info@gentextraining.com



- Designing document registers and master lists.
- Applying revision conventions and status codes.
- Managing superseded, voided, and archived documents.
- Tracking effective dates and distribution status.
- Handling urgent revisions and interim changes.
- Drafting a numbering and revision standard.

Day 3: Distribution, Transmittals, and Approvals

- Managing controlled distribution lists and holders.
- Preparing transmittals and acknowledgment records.
- Administering review and approval workflows.
- Applying signature authority and delegation rules.
- Coordinating comments, mark-ups, and consolidation.
- Controlling external issue to clients, vendors, and authorities.
- Practicing transmittal and workflow administration.

Day 4: EDMS Platforms and Digital Control

- Working with EDMS and document management platforms.
- Applying metadata, indexing, and search configuration.
- Managing permissions, access levels, and audit trails.
- Handling scanning, digitization, and conversion.
- Managing workflows, notifications, and approval routing.
- Applying backup, retention, and migration practices.
- Reviewing an EDMS configuration.





Day 5: Audits, Evidence, and Continuous Improvement

- Preparing records for internal and external audits.
- Responding to document retrieval and evidence requests.
- Managing nonconformities related to document control.
- Training project teams on document control discipline.
- Measuring performance with accuracy and timeliness indicators.
- Reviewing systems and planning improvements.
- Preparing a 90-day document control action plan.

Conclusion

By successfully completing Document Control Specialist, participants will gain the knowledge to number, register, revise, and distribute documents under proper control, and to prove that control during audits. They will acquire skills in revision and register management, distribution and transmittal control, EDMS administration, and audit readiness that protect technical and regulatory compliance. Gentex Training Center builds this course around real controlled document sets, so learners return ready to perform as dependable document control specialists.

FAQs

Q1 What is the "Document Control Specialist" course about?



It prepares participants to manage controlled documents across their full lifecycle. The course covers numbering and registers, revision control, distribution and transmittals, approval workflows, EDMS administration, ISO 9001 documented information requirements, and audit readiness.

Q2 What are the key benefits of the "Document Control Specialist" course?

Participants prevent the use of superseded documents, keep registers and transmittals accurate, and pass audits with complete evidence. They also reduce rework caused by uncontrolled changes, manage EDMS workflows properly, and become the reliable point of control on technical projects.

Q3 What skills will I gain from the "Document Control Specialist" course?

You will gain document numbering and register management, revision control and status tracking, distribution, transmittal and approval administration, and EDMS administration and audit readiness. These four skills work together to make document control reliable and verifiable.

Q4 What tools, methods, or standards are covered in the "Document Control Specialist" course?

The course covers ISO 9001 documented information requirements, quality management system documentation tiers, numbering schemes for documents and drawings, document registers and master lists, revision conventions and status codes, superseded and voided document management, controlled distribution lists, transmittals and acknowledgment records, approval workflow and signature authority rules, EDMS metadata and permission configuration, audit trails, retention and migration practices, and audit checklists.



Q5 How is the "Document Control Specialist" course applied in real-world practice?

Participants build a numbering and revision standard, prepare a register and a transmittal set for their own project, and configure an EDMS permission structure. They also respond to a simulated audit retrieval request and complete a 90-day plan for strengthening document control in their function.