
Engineering Document Control: Revision Workflows, Transmittals and Asset Handover Training Course

22 – 26 March 2027
New York





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Programme Summary

Engineering document control for revision workflows, transmittals and asset handover is a five-day training course for document control leads at advanced level, culminating in an engineering document control improvement plan for a live or upcoming project. On capital projects, a construction team working from a superseded drawing or an operator receiving incomplete as-built records creates cost and risk that surface years later. The approach follows a document from numbering and revision control through review, transmittal and system management to handover. Mars Training Centre UK delivers this programme in engineering document control.

The Business Case

Every engineering decision on site depends on the right revision of the right document reaching the right person. When numbering is inconsistent, review cycles stall or transmittals go untracked, rework rises, claims become harder to defend and handover drags on after mechanical completion. A disciplined function protects schedule, supports contractual positions and gives operations the information to run the asset.

- Rework from Superseded Information: Falls as revision status and withdrawal of old copies are controlled.
- Review Cycle Time: Shortens as workflows, response codes and overdue reporting are standardised.
- Handover Completeness: Improves as as-built records and asset data are planned from the start.

Principles and Evidence Base

- ISO 9001 Clause 7.5 Documented Information: Its requirements for identification, review, approval and version control frame Sessions 1 and 2.
- ISO 19650 Series: Its information management roles, common data environment states and asset information model structure Sessions 1, 4 and 5.
- ISO 15489-1 Records Management: Its principles for retention and disposition guide close-out archiving in Session 5.

Intended Participants

- Professionals who lead document control teams on engineering, construction or plant projects.
- Information managers who configure electronic document management systems for project partners.
- Project administration heads responsible for correspondence and contractual records.
- Leads preparing handover information for operations and maintenance teams.

The programme serves oil and gas, utilities, infrastructure, construction and manufacturing organisations.



Learning Outcomes

1. Participants will be able to diagnose the maturity of a project's document control procedure against ISO 9001 and ISO 19650 requirements.
2. Participants will be able to design numbering, metadata and revision conventions for multi-party projects.
3. Participants will be able to construct review, approval and transmittal workflows with measurable turnaround times.
4. Participants will be able to evaluate an electronic document management system or common data environment against project needs.
5. Participants will be able to audit document control compliance and prioritise corrective actions.
6. Participants will be able to plan as-built capture, asset information handover and records retention at close-out.

Programme Structure

Day 1: Engineering Document Control Principles and Standards

What must a document control system guarantee on an engineering project?

- ISO 9001 Clause 7.5 Documented Information Requirements
- ISO 19650 Information Management Roles and Responsibilities
- Document Control Procedure and Responsibility Matrix
- Master Document Register and Deliverables List
- Document Control Maturity Diagnostic

Day 2: Numbering, Metadata and Revision Control

How is every document identified, versioned and given a status that all parties trust?

- Document Numbering Schemes and Originator Codes
- Metadata Fields and Classification Rules
- Revision and Version Conventions
- Status Codes from Work in Progress to Approved for Construction
- Superseded Document Withdrawal and Uncontrolled Copies

Day 3: Review, Approval Workflows and Transmittals

How do documents move between contractor, consultant and client without loss or delay?

- Review and Approval Workflow Design
- Review Comment Sheets and Response Codes
- Transmittal Forms and Distribution Matrices
- Correspondence Registers and Technical Queries
- Turnaround Time Tracking and Overdue Reporting



Day 4: Electronic Document Management and Common Data Environments

Which system configuration keeps information secure, current and auditable?

- EDMS Selection and Configuration Criteria
- ISO 19650 Common Data Environment Information States
- Access Rights and Security Classification
- Document Control Key Performance Indicators
- Internal Audit of Document Control Compliance

Day 5: Applying Engineering Document Control to Asset Handover

Is the project ready to hand over complete and accurate information to operations?

- As-Built Drawing Capture and Redline Management
- Asset Information Model and Handover Data Requirements
- ISO 15489-1 Records Retention and Archiving at Close-Out
- Checking Day 2 Status Codes Against the Day 3 Transmittal Log
- Engineering Document Control Improvement Plan Completion

Methodology

The programme uses structured exercises built on a simulated multi-party engineering project, with drawings, registers and transmittals that participants control from issue to handover. Case analysis from infrastructure and process plant projects shows the cost of weak practice, and each session closes with peer review.

- Suggested activity: Designing a numbering and metadata scheme for a three-contractor project.
- Suggested activity: Tracing an incident back through a register to a superseded drawing.
- Suggested activity: Auditing a sample handover package against asset data requirements.

Capstone Output

Each participant completes an engineering document control improvement plan for a live or upcoming project. It covers the maturity diagnostic, numbering and status conventions, workflow and transmittal design, system and access configuration, performance indicators and a handover and archiving plan, ready to present to the project director.



Frequently Asked Questions

Is engineering document control training suitable for experienced document controllers?

Yes. It is set at advanced level and assumes experience on at least one engineering or construction project, and suits controllers moving into lead roles.

Which standards does the engineering document control programme rest on?

It rests on ISO 9001 clause 7.5 for documented information, the ISO 19650 series for information management and common data environments, and ISO 15489-1 for records retention.

How is the improvement plan from engineering document control training used at work?

You can present it to your project director as the basis for procedure updates, system configuration and handover planning on your current project.

How does engineering document control differ from records and information governance courses?

It concentrates on day-to-day control of drawings and project documents through revision, transmittal and handover, rather than enterprise-wide information policy.