

**COURSE OVERVIEW TM0735**  
**Document Control and Record Management (CDCRM)**

**Course Title**

Document Control and Record Management (CDCRM)

**Course Date/Venue**

Session 1: July 13-17, 2025/Tamra Meeting Room, Al Bandar Rotana Creek, Dubai, UAE

Session 2: October 12-16, 2025/Meeting Plus 9, City Centre Rotana, Doha, Qatar



**Course Reference**

TM0735



**Course Duration/Credits**

Five days/3.0 CEUs/30 PDHs

**Course Description**



***This practical and highly-interactive course includes real-life case studies and exercises where participants will be engaged in a series of interactive small groups and class workshops.***

This course is designed to provide participants with a detailed and up-to-date overview of document control, archiving and documentation. It covers the document management, policies and procedures, specifications, standard operating procedures/forms, logbooks, material handling documentation, maintenance documentation, quality control documentation, quality assurance documentation, production documentation, validation documentation, records inventories, retention schedules, indexes and filing classification system.



Further, the course will also discuss the document responsibilities; identify the relationship between documents and records; the document accessibility; the revisions and deviations; and the document control procedures.



During this interactive course, participants will learn the policies, procedures, specifications, standard operating procedures (SOP), forms and logbooks; the documentation for material handling, maintenance, quality control, quality assurance, production and validation functions; and the records inventory, specify the documents retention schedules and perform filing indexing.

## Course Objectives

Upon the successful completion of this course, each participant will be able to:-

- Apply and gain an in-depth knowledge on document control, archiving and documentation
- Define document responsibilities and identify the relationship between documents and records
- Specify document accessibility and handle revisions and deviations
- Write document control procedures
- Control policies, procedures, specifications, standard operating procedures (SOP), forms and logbooks
- Manage the documentation for material handling, maintenance, quality control, quality assurance, production and validation functions
- Compile the records inventory, specify the documents retention schedules and perform filing indexing

## Exclusive Smart Training Kit - H-STK®



Participants of this course will receive the exclusive “Haward Smart Training Kit” (H-STK®). The H-STK® consists of a comprehensive set of technical content which includes **electronic version** of the course materials conveniently saved in a **Tablet PC**.

## Who Should Attend

This course provides an overview of all significant aspects and considerations of certified document controller for those who required to develop, manage or control technical documentation, including specifications, procedures and standards.

## Training Methodology

All our Courses are including **Hands-on Practical Sessions** using equipment, State-of-the-Art Simulators, Drawings, Case Studies, Videos and Exercises. The courses include the following training methodologies as a percentage of the total tuition hours:-

- 30% Lectures
- 20% Practical Workshops & Work Presentations
- 30% Hands-on Practical Exercises & Case Studies
- 20% Simulators (Hardware & Software) & Videos

In an unlikely event, the course instructor may modify the above training methodology before or during the course for technical reasons.

## Accommodation

Accommodation is not included in the course fees. However, any accommodation required can be arranged at the time of booking.

**Course Certificate(s)**

(1) Internationally recognized Competency Certificates and Plastic Wallet Cards will be issued to participants who completed a minimum of 80% of the total tuition hours and successfully passed the exam at the end of the course. Certificates are valid for 5 years.

**Recertification is FOC for a Lifetime.**

**Sample of Certificates**

The following are samples of the certificates that will be awarded to course participants: -



- (2) Official Transcript of Records will be provided to the successful delegates with the equivalent number of ANSI/IACET accredited Continuing Education Units (CEUs) earned during the course.

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**Haward Technology Middle East**  
Continuing Professional Development (HTME-CPD)

CEUs

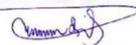
### CEU Official Transcript of Records

**TOR Issuance Date:** 05-Oct-17  
**HTME No.** PAR21925  
**Participant Name:** Jamal Al Sebaie

Program Ref.	Program Title	Program Date	No. of Contact Hours	CEU's
TM735	Document Control Process & Practical Solutions	October 01-05, 2017	30	3.0

Total No. of CEU's Earned as of TOR Issuance Date **3.0**

**TRUE COPY**

  
 Maricel De Guzman  
 Academic Director

Haward Technology has been approved as an Authorized Provider by the International Association for Continuing Education and Training (IACET), 1760 Old Meadow Road, Suite 500, McLean, VA 22102, USA. In obtaining this approval, Haward Technology has demonstrated that it complies with the ANSI/IACET 1-2013 Standard which is widely recognized as the standard of good practice internationally. As a result of their Authorized Provider membership status, Haward Technology is authorized to offer IACET CEUs for programs that qualify under the ANSI/IACET 1-2013 Standard.

Haward Technology's courses meet the professional certification and continuing education requirements for participants seeking Continuing Education Units (CEUs) in accordance with the rules & regulations of the International Association for Continuing Education & Training (IACET). IACET is an international authority that evaluates programs according to strict, research-based criteria and guidelines. The CEU is an internationally accepted uniform unit of measurement in qualified courses of continuing education.

Haward Technology is accredited by











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\* Haward Technology \* CEUs \* Haward Technology \* CEUs \* Haward Technology \* CEUs \* Haward Technology \*

**Certificate Accreditations**

Certificates are accredited by the following international accreditation organizations: -

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British Accreditation Council (BAC)

Haward Technology is accredited by the **British Accreditation Council** for **Independent Further and Higher Education** as an **International Centre**. BAC is the British accrediting body responsible for setting standards within independent further and higher education sector in the UK and overseas. As a BAC-accredited international centre, Haward Technology meets all of the international higher education criteria and standards set by BAC.

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The International Accreditors for Continuing Education and Training (IACET - USA)

Haward Technology is an Authorized Training Provider by the International Accreditors for Continuing Education and Training (IACET), 2201 Cooperative Way, Suite 600, Herndon, VA 20171, USA. In obtaining this authority, Haward Technology has demonstrated that it complies with the **ANSI/IACET 2018-1 Standard** which is widely recognized as the standard of good practice internationally. As a result of our Authorized Provider membership status, Haward Technology is authorized to offer IACET CEUs for its programs that qualify under the **ANSI/IACET 2018-1 Standard**.

Haward Technology’s courses meet the professional certification and continuing education requirements for participants seeking **Continuing Education Units** (CEUs) in accordance with the rules & regulations of the International Accreditors for Continuing Education & Training (IACET). IACET is an international authority that evaluates programs according to strict, research-based criteria and guidelines. The CEU is an internationally accepted uniform unit of measurement in qualified courses of continuing education.

Haward Technology Middle East will award **3.0 CEUs** (Continuing Education Units) or **30 PDHs** (Professional Development Hours) for participants who completed the total tuition hours of this program. One CEU is equivalent to ten Professional Development Hours (PDHs) or ten contact hours of the participation in and completion of Haward Technology programs. A permanent record of a participant’s involvement and awarding of CEU will be maintained by Haward Technology. Haward Technology will provide a copy of the participant’s CEU and PDH Transcript of Records upon request.

**Course Fee**

Dubai	<b>US\$ 5,500</b> per Delegate + <b>VAT</b> . This rate includes H-STK® (Haward Smart Training Kit), buffet lunch, coffee/tea on arrival, morning & afternoon of each day.
Doha	<b>S\$ 6,000</b> per Delegate. This rate includes H-STK® (Haward Smart Training Kit), buffet lunch, coffee/tea on arrival, morning & afternoon of each day.

### **Course Instructor(s)**

This course will be conducted by the following instructor(s). However, we have the right to change the course instructor(s) prior to the course date and inform participants accordingly:



**Mr. Drag Zic** is a **Senior Project Management Consultant** with over **30 years** of extensive experience. His expertise mainly covers **Project & Contract Management; Project Management, Planning, Budgeting & Cost Control, Scheduling, Budgeting & Cost Control; Project Management Essentials, Advanced Project Management, Project Reporting, Best Practices** for Managing Multiple Projects, **Document Management, Record Management, Leadership & Business, Performance Management, Customer Service Management, Quality Management, Risk Management, Data Management Systems, R&D, Research Management, Leading Effective Meetings, Leadership & Business, Presentation Skills, Decision Making Skills, Communication Skills, Negotiation Skills, Coaching & Mentoring, Performance Management, Customer Service Management, Critical Thinking & Creativity, Quality Management and Risk Management.** Further, he is well-versed in Analytical & Chemical Laboratory Management, Statistical Analysis of Laboratory Data, Statistical Method Validation & Laboratory Auditing, Sample Development & Preparation in Analytical Laboratory, Data Analysis Techniques, Laboratory Quality Management (ISO 17025), Applied Research & Technology, Basic Geology, Quality Assurance Assessment, Quantified Risk Assessment (**QRA**) as well as in Seismic Monitoring Systems, Seismological Software (4di, Xmts, OptiNet and ErrMap), Data Analysis, Rock Mass Stability Analysis, Seismic Budget Planning & Productivity Improvement Analysis, HazMap, ISO Standards as well as Balance Scorecard. He is currently the **Director & Principal Consultant** of **DRAMI** wherein he is responsible in formulating and executing the plans for applied research and technology transfer.

**During Mr. Zic's career life, he had occupied several significant positions as the Project Manager, Contract Manager, Programme Manager, Safety & Engineering Manager, Rock Engineering Manager, Laboratory Manager and Mine Seismologist with different international companies.**

Mr. Zic is a **Professional Natural Scientist**, has a **Bachelor** degree in **Geology**, a **Diploma in Management Development Programme** and currently enrolled for **Phd in Wits University**. Further, he is a **Certified Instructor/Trainer**, a **Certified Trainer/Assessor** by the **Institute of Leadership & Management (ILM)** and an active member of various professional engineering bodies internationally like the European Geosciences Union (**EGU**), the Canadian Institute of Mining (**CIM**), the Project Management South Africa (**PSMA**), the European Association of Geoscientists and Engineers (**EAGE**), the South African Council for Natural Scientific Professions (**SACNASP**), the International Society for Rock Mechanics (**ISRM**) and the South African Geophysical Association (**SAGA**). He has further delivered numerous trainings, workshops, conferences and seminars internationally.

**Course Program**

The following program is planned for this course. However, the course instructor(s) may modify this program before or during the course for technical reasons with no prior notice to participants. Nevertheless, the course objectives will always be met:

**Day 1**

0730 – 0800	<i>Registration &amp; Coffee</i>
0800 – 0815	<i>Welcome &amp; Introduction</i>
0815 – 0830	<b>PRE-TEST</b>
0830 – 0930	<b>Document Management</b> <i>Information Flow &amp; Information Float • The Information Audit: Basic Inventories • Centralized &amp; Decentralized Records Systems • The Role of Computerized Information Systems (IS) in the Modern Organization</i>
0930 – 0945	<i>Break</i>
0945 – 1100	<b>Document Management (cont'd)</b> <i>Forms Design &amp; Creation: Art Direction &amp; Print Production • Interviewing for Needs Analyses • Needs Analysis Variables for Records Managers • Compilation of Needs Analysis Surveys</i>
1100 – 1230	<b>Policies &amp; Procedures</b> <i>Institutional Structure &amp; the Record Group • Policy as Internal Law: The Role of the Board &amp; Senior Management in Records Policy Formulation &amp; Approval • The Mission Statement, Goals &amp; Objectives: The Impact on Records Management</i>
1230 – 1245	<i>Break</i>
1245 – 1420	<b>Policies &amp; Procedures (cont'd)</b> <i>The Records Manual: Clarity &amp; Concision in Action • Active, Semi-Active &amp; Inactive Records • Flexibility in Policy &amp; Procedures</i>
1420 – 1430	<b>Recap</b> <i>Using this Course Overview, the Instructor(s) will Brief Participants about the Topics that were Discussed Today and Advise Them of the Topics to be Discussed Tomorrow</i>
1430	<i>Lunch &amp; End of Day One</i>

**Day 2**

0730 – 0930	<b>Specifications</b> <i>Specification Document Categories • Specification Document Format • Specification Document Control</i>
0930 – 0945	<i>Break</i>
0945 – 1100	<b>Standard Operating Procedures/Forms</b> <i>SOP Format • Who Writes SOPs? • SOP Language &amp; Detail • SOP Review &amp; Approval • SOP Topics • Data Collection Forms</i>
1100 – 1230	<b>Logbooks</b> <i>Logbooks as Controlled Documents &amp; Records • Types of Logbooks</i>

1230 – 1245	Break
1245 – 1420	<b>Material Handling Documentation</b> Material Handling Resources • Material Handling Practices & Procedures • Material Receipt & Material Receiving Logbook • Inspection, Labelling & Storage of Materials • Movement of Materials & Inventory Control • Warehousing Practices
1420 – 1430	<b>Recap</b> Using this Course Overview, the Instructor(s) will Brief Participants about the Topics that were Discussed Today and Advise Them of the Topics to be Discussed Tomorrow
1430	Lunch & End of Day Two

### Day 3

0730 – 0930	<b>Material Handling Documentation (cont'd)</b> Production Scheduling • Distribution Control Practices & Shipping Logbooks/Databases • Returned Goods • Files in Material Handling • Procedures for Material Handling • Records Created in Materials Handling
0930 – 0945	Break
0945 – 1100	<b>Maintenance Documentation</b> Maintenance Department Resources • Facility Control Practices & Procedures • Equipment Control Practices & Procedures
1100 – 1230	<b>Maintenance Documentation (cont'd)</b> Equipment History Files • Maintenance Procedures • Records Created by Maintenance
1230 – 1245	Break
1245 – 1420	<b>Quality Control Documentation</b> Resources for Quality Control • Quality Control Practices & Procedures • QC Procedures • Records Generated by QC
1420 – 1430	<b>Recap</b> Using this Course Overview, the Instructor(s) will Brief Participants about the Topics that were Discussed Today and Advise Them of the Topics to be Discussed Tomorrow
1430	Lunch & End of Day Three

### Day 4

0730 – 0930	<b>Quality Assurance Documentation</b> Quality Assurance Resources • QA Practices & Procedures • QA Procedures • Records Created by QA
0930 – 0945	Break
0945 – 1100	<b>Production Documentation</b> Production Resources • Production Practices & Procedures • Primary Manufacturing Processes • Secondary Manufacturing Processes • Product-Specific Manufacturing Processes • Secondary Manufacturing Preparation Records vs. Procedures & Forms
1100 – 1230	<b>Production Documentation (cont'd)</b> Logbooks • The Documentation Process in Production • Making Changes to Original Data "Afterwards" • Printouts • Contract Manufacturing • Documents & Records of Production

1230 - 1245	Break
1245 - 1420	<b>Validation Documentation</b> Validation Study Master Plans • Validation Practices & Procedures • Records of Validation
1420 - 1430	<b>Recap</b> Using this Course Overview, the Instructor(s) will Brief Participants about the Topics that were Discussed Today and Advise Them of the Topics to be Discussed Tomorrow
1430	Lunch & End of Day Four

**Day 5**

0730 - 0930	<b>Records Inventories, Retention Schedules &amp; Indexes</b> Compilation of the Records Inventory • Compilation of the Retention Schedule: Business & Legal Issues
0930 - 0945	Break
0945 - 1100	<b>Records Inventories, Retention Schedules &amp; Indexes (cont'd)</b> Compilation of Indexes Developed from Inventories & Retention Schedules • Authority Control for Records Managers • Senior Management Sign-Off
1100 - 1230	<b>Filing Classification System</b> Files Management & Filing Systems • Alphabetic Filing Classification Systems • Numeric Filing Classification Systems
1230 - 1245	Break
1245 - 1300	<b>Filing Classification System (cont'd)</b> Alphanumeric Filing Classification Systems
1300 - 1315	<b>Course Conclusion</b> Using this Course Overview, the Instructor(s) will Brief Participants about the Course Topics that were Covered During the Course
1315 - 1415	<b>COMPETENCY EXAM</b>
1415 - 1430	Presentation of Course Certificates
1430	Lunch & End of Course

### **Practical Sessions**

This practical and highly-interactive course includes real-life case studies and exercises:-



### **Course Coordinator**

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