**Registering a new Project:**

When a [PID/PAR](file:///S%3A%5CEFD_14.0%20Portfolio%20Services%5C14.15%20Current%20Templates%5C1.%20PIDs%2C%20PAR%27s%2C%20Business%20Case%20Templates%5CPSO_Med_and_Large_PID%26PAR_Template.xlsx) is received the following steps should be taken to register this:

1. QA the PID/PAR. Ensure all relevant information has been completed as best as possible. Request further information from the UPO if necessary.
2. Open the [Master Projects List](file:///S%3A%5CEFD_14.1%20Project%20Registers%5CMaster%20Projects%20List.xlsm) and determine the next PSO number in the sequence. Enter this under ‘Unique Project Reference’ on the PID, then import the PID into the Master Projects List.
3. Create a new Folder in [S:\EFD\_14.13 Projects](file:///S%3A%5CEFD_14.13%20Projects) using the new PSO number.
4. Create a Stage Gate 1 folder and save the PID/PAR.
5. Create a new Project in the Portfolio Services Inbox, under ‘Capital Projects’.
6. Send the PID/PAR out for Stage Gate 1 Approval.
7. Add the project to the weekly [comm’s approvals spreadsheet](file:///S%3A%5CEFD_14.0%20Portfolio%20Services%5C14.0%20PMO%20Admin%5C06.%20SG%20Tracker%20and%20Comms%5CW.E.%2003.02.18.xlsx).
8. Once approval has been sought, send the approved PID/PAR, along with the corresponding confirmation of funding (committee/minutes, confirmation email etc.) to Estates Finance to request a task code.
9. Set up a [monthly report](file:///S%3A%5CEFD_14.0%20Portfolio%20Services%5C14.15%20Current%20Templates%5C6.%20Reporting%20Templates%5CReport%20Template%20MASTER2.xlsm) for the new project and save to the [Live Highlights Reports](file:///%5C%5Cad.ucl.ac.uk%5CGroupFolders%5CEFD_14.0%20Portfolio%20Services%5C14.2%20Reporting%5C02%20Live%20Highlight%20Reports) Folder.
10. Establish the [Terms of Reference](file:///S%3A%5CEFD_14.0%20Portfolio%20Services%5C14.15%20Current%20Templates%5C3.%20Board%20and%20Meeting%20Templates%5CPSO_Template_ProjectBoardToR_V2.docx) with the UPO and set up initial project boards.
11. Add project to the following trackers:
12. [Stage Gate Tracker](file:///S%3A%5CEFD_14.0%20Portfolio%20Services%5C14.0%20PMO%20Admin%5C06.%20SG%20Tracker%20and%20Comms%5CCP%20SG%20Tracker%5CStage%20Gates%20Update%20List%20V2.xlsx)
13. [Project Board Tracker](file:///S%3A%5CEFD_14.0%20Portfolio%20Services%5C14.0%20PMO%20Admin%5C06.%20SG%20Tracker%20and%20Comms%5CProject%20Board%20Tracker%5CProject%20Board%20Calendar_Tracker.xlsx)
14. [Master Tracker](file:///S%3A%5CEFD_14.0%20Portfolio%20Services%5C14.2%20Reporting%5C03%20Master%20Database%5CCopy%20of%20Master%20Tracker%20V2.xlsm) (To do this: Copy and paste the line from above, then Ctrl F, and put the exact title of the report of the above project, click find all, then in the ‘Replace’ box, put the exact file name of the report of the new project. Highlight all values on the current spreadsheet line and click ‘Replace All’).
15. If the project is funded through the Capital Plan, add to the [CP Cashflow](file:///S%3A%5CEFD_14.0%20Portfolio%20Services%5C14.2%20Reporting%5C03%20Master%20Database%5CCP%20Cashflow.xlsx). (Follow the instructions above).
16. Add to the [CP Summary](file:///S%3A%5CEFD_14.0%20Portfolio%20Services%5C14.2%20Reporting%5C03%20Master%20Database%5CCP%20Summary.xlsx) under Stage Gate 1. (Follow the instructions above).
17. Add to the [Reporting Checklist.](file:///S%3A%5CEFD_14.0%20Portfolio%20Services%5C14.2%20Reporting%5C05%20Reporting%20Process%5CCapital%20Projects%20Monthly%20Reports%20Checklist.xlsx)