**Training Agenda**

1. Team structure
2. UCL structure - SLMS/Beams/SLASH/IoE/Professional Services
3. Estates Structure
4. Project procedures in 14.11.00
5. Project Lifecycle (minor works to large projects) - use 14.5, 14.11.02 workflows
   1. Project sponsor doc looks useful 14.16
   2. Business Case/PID examples
   3. Stage Gates
   4. Order of stage gates
   5. Approvers (update safety at SG3) - show where distribution lists are kept
   6. The stage gate weekly tracker
   7. 14.15.2 - stage gate templates inc checklist
   8. 14.15.8 guidance
6. Approvals chain
   1. Look at committee dates Look at approval amounts
   2. Look at committee forward look
7. Review a project Report 14.2
   1. Reporting timescales
   2. Reporting checks in 14.2.05
   3. Axiom (send axiom set up form to finance) 14.11.01 axiom guide
   4. 14.15.8 - guidance
8. Programme Board - 14.12
   1. ToR
   2. When are they, who are the attendees, what does it do
   3. What papers go there
9. Programme Report
   1. Go through the last one for SMP
   2. Cashflows
   3. Project summary
   4. Dashboard
   5. Exception reports
   6. Other data
10. The Tracker
11. PSO filing convention
12. Workload allocation to team leaders
13. 14.13 - project folders
14. 14.15.8 - guidance docs
15. Risk
16. Finance
    1. Finance responsibilities
    2. How task codes get raised
    3. How does a PO get raised and approved
    4. Axiom

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| **Training Checklist** | | |
|  | **EMPLOYEE** | |
| **TASK** | **Ellen Herrod - 22/01/18** | **Aisha - 05/02/18** |
| ***PSO Inbox*** | X |  |
| ***PSO Calendar*** | X |  |
| ***S-Drive and location of folders*** | X |  |
| ***Templates*** | X |  |
| ***PID's/PAR's*** | X |  |
| ***Minor Works Process*** | X |  |
| ***Monthly Reporting*** | X |  |
| ***Tracker & Project Register*** | X |  |
| ***Capital Programme Report*** | X |  |
| ***Axiom Reports*** | X |  |
| ***RIBA Stage Gates & Weekly Tracker*** | X |  |
| ***Setting up project boards*** | X |  |
| ***Comms update*** | X |  |
| ***Committee Tracker*** | X |  |
| ***Finding Minutes on intranet*** | X |  |
| ***Workload Allocation to Team Leaders*** | X |  |
| ***PSO Filing Convention*** | X |  |