Maintain P3 Registers

Field	Description	Tailoring Required
Reference	CF.2.2.01A	
Service Name	Maintain P3 Registers	
Service Description	Capturing, recording and updating information ensuring entries are: • aligned to the delivery framework • complete • written in accessible language • accurate and timely • formatted consistently • Specific, Measurable, Accountable, Realistic & Timely (SMART) It is assumed that the process, template and tools have been agreed and provided. It is worth noting that the contents of the register belong to the P3M or a delegated person for the P3M.	
Why do the service at all?	To facilitate effective management and decision making To provide visibility, traceability and accountability To enable review and learn lessons To provide an audit trail	
Why should the PMO do it?	Objectivity Consistent application of the delivery framework specifically tools and templates Information captured centrally from multiple resources providing a single source of truth Could be cost effective to have a central resource across all projects Development opportunity for PMO Team	
How the PMO will measure the value of the service	Time and effort to provide accurate decision support information Stakeholder confidence Compliance Reduction of costs due to compliance and complete information	

Field	Description	Tailoring Required

SIPOC
  - Suppliers
  - Inputs
  - Processes
  - Outputs
  - Customers
	PMO Service Catalogue - Miro	

What the PMO will do in delivering the service	1 – Initial population of the register. 2 – Based on P3 standards in the delivery framework, identify where information is incorrect, inconsistent, missing or out of date. 3 – Contact record and action owners for more accurate and timely information. 4 – Update information held within the register, including the addition of new records. Close records that are no longer relevant 5 – Communicate changes to Register, Record and/or Action Owners (Impacted Stakeholders) *The types of Registers that the PMO will maintain are included in Appendix 1 of this Service.*	
Connected services	Develop, implement and maintain a delivery framework *Other services to be connected once tailoring of Annex A has been completed.*	
INFORMATION REQURIED FOR EACH SERVICE TO BE DETERMINED AT SET UP – specific to organisations.		

Field	Description	Tailoring Required
Performance expectations and service level agreements	Timely and accurate information. How many days is the data required prior to the Governance meeting. Register owner should be aware of any release of updates. There needs to be clear accountability for those who need to provide the information for the register.	
Eligibility	Advised for all registers to provide consistency	
Recharging arrangements	Consider external and internal recharging including recharge to clients	

HELPFUL HINTS FOR FIELDS IN THE OPERATIONS HANDBOOK – Internal PMO review		
Tailoring guidelines	The contents/ columns of each register will differ from organisation to organisation.

When determining the update frequency and deadlines, consider when the information is required for decision making.

If they are going to be tailored for your project/ programme/ department, consider how the data may be consolidated at the next level up.

This service may be combined with another service which requires contribution to the creation of the data in the register. (i.e. Risk Register being an output of the Risk Workshop)

Where the register is maintained by more than one person, clarity is required on RACI for each entry.

Access (particularly update access) needs to be managed carefully to avoid overwriting other updates.

Records may not be able to be deleted due to Archive and Data Retention policies and learning

Configuration Control of documents is important. Most registers don't have a version but do have an 'as at date'.

Access to the data held in the registers need to be considered as this may need to be controlled to only those roles that need the information.

A field showing the associated change and the date is useful to highlight where and when changes have been made | |

	Actual structure and content of the register needs to be tailored and adapted to strategy of the portfolio/s being worked on. The register must be aligned to the terms of reference of the Governance body. Think about presentation of the data, it can be produced by a defined view in a system, and you would need to consider how the data is translated into information and storytelling. Predefined templates may be used if documented in the Delivery Framework. A unique reference may be required for records to support tracking Ensure the register supports assurance reviews and reporting timelines Highlight where integration is needed with other registers and how that's managed. Consider tagging entries by project lifecycle stage (initiation, delivery, closure) Include a column or ruleset for escalation paths If automating the registers, ensure the notifications are set up At the end of the project the registers should be stored to be used on future delivery to avoid starting from a blank sheet of paper.	
PMO Capabilities needed to provide the service	*KSB to be added prior to publication*	
Connected services		

Named PMO Service Owner, PMO Service Manager and PMO Service Operatives, including associated RASCI	This role is typically provided by a PMO administrator. Where the role is provided by a PMO analyst, it is typically combined with the service that contributes to the creation of the data and the evaluation of the records.	
Which offices in the PMO structure offer the service	Project or programme office.	
Supporting tools, techniques, and systems	Office software e.g. SharePoint, Excel, Word, Specialist software (with integration into other registers).	
Templates and user instructions	*Link out to templates and user instructions*	
Costs associated with service delivery.	Primarily time spent delivering the service IT costs may be apportioned if using a system.	
MISCELLANEOUS		
Additional reading and guidance		
Critical success factors (CSF's)	Register template and relevant framework. Strong Leadership Support	

Appendix 1 - Types of Registers

	Type of Register	Purpose	Additional Notes and Tips
	Actions Register	List of actions relating to the project, programme or portfolio	
	Approvals Register	Lists the approvals made during the P3 lifecycle and who gave the approval This may be merged with the decisions register	
	Asset Register	List of all Assets that are owned or used by the project, programme or portfolio.	Can be used to track depreciation of assets and maintenance requirements
	Assumptions Register	Assumptions raised during the project. These are factors that are believed to be true or certain though cannot be fully confirmed	Assumptions should be reviewed regularly to confirm that they are still relevant
	Assurance Recommendations Register	Log of recommendations raised from Assurance reviews	
	Audit & Assurance Actions Register	This will include both internal and external Audit and Assurance Actions to ensure that these are completed and fed back to close the audit report.	
	Benefits Register	Captures and tracks all the identified benefits of a project throughout its lifecycle	
	Change Control Register	Details of all changes including decision on the approval status	Should include the version of the Project Baseline and the impact on the Project Budget.
	Communication Register	List of communications sent out from the project	
	Concessions/Derogation Register	Compromises or adjustments made to accommodate constraints, demands or challenges	These may be included in the decisions register

	Type of Register	Purpose	Additional Notes and Tips
	Conditions Register	Circumstances or factors that must be present or met for the project to proceed or be successful (e.g. regulatory requirements)	
	Constraints Register	List of limitations or restrictions that the project must operate within	
	Contractual Obligations (Commitments) Register	A centralized list used to track and manage all contractual commitments. It includes details about the terms, start and end dates, value, and status of each contract. This register helps ensure that all parties fulfil their contractual duties and provides a clear overview of the organization's legal and regulatory requirements.	
	Consultation Register	List of conversations with Union/Professional Body Representatives where the record of what was discussed is key.	
	Cost Tracker	Maintain a tracker of project expenses	
	Current and Potential P3M Register (Backlog & Pipeline)	A list of projects and programmes or Portfolio with their relevant details and status including costs and expected delivery date. This may include ideas for projects which have not yet been agreed.	Having this register supports project prioritisation and prevents potentially duplicating projects. Initially starting with the active projects, it should be expanded to include ideas and projects which have not yet been approved or started.
	Decision Register	List of decisions relating to the project, programme or portfolio	Capturing the decisions and the dates that they were made, ensures when the project is being reviewed

Type of Register	Purpose	Additional Notes and Tips
Delegation of Authority Register	If not included in your Delivery Framework, a separate register may be required to confirm who has the authority for approval	
Departure Registers	Departures refer to significant deviations from the original plan or methodology i.e. changing the primary objective	These are often strategic and involve a deliberate decision to change course based on new information or insight.
Dependency Register	Capturing P3M Dependencies to capture whether there is potential for risks and issues with delivery These could be just internal to the project or external to the project (Interdependency)	The PMO should check that each project has a dependency register and confirm that the dependency is not one way i.e. in one project register but not in the dependent register The PMO can also highlight where a risk or issue has arisen on the dependent activity and highlight to the Programme or Portfolio Manager.
Engagement Register	List of engagements with Customer or key stakeholders	This helps inform the project team of conversations that may have happened from another member of the team prior to their interaction.
Exclusion Registers	List of components that are not included in the project to set expectations and avoid scope creep	
Information (Data) Requests	List of requests for information such as GDPR requests. Will include the outcome of the request and the information sent	If multiple information is requested by a single person consider if they should be added to the Stakeholder Register
Interfaces Register	The points of interaction between different components, such as projects, teams, functions, processes	Could be included in the dependencies register

	Type of Register	Purpose	Additional Notes and Tips
	Issues Register	Recording and updating of issues on behalf of a project or programme	If issues are not getting resolved this should be escalated in the first instance to the project manager and in line with the delivery framework Issues can be deemed important because a due date is imminent, and it has a high severity
	Lessons Register	Capturing of any lessons identified during a project or programme At Portfolio Level this will common lessons that are seen on all projects	Lessons should be captured if both positive and negative. The lessons learnt register should be available to all Project and Programme Managers so that lessons are both captured and learnt from in future projects.
	Organisation Chart/ Team Register	List of personnel contact details and roles	Can be combined with the Stakeholder Register if it has an internal/external filter GDPR considerations should be applied if shared outside of the organisation. *Linked to the Onboarding service*
	Preferred Suppliers Register	List of Suppliers that the company prefer to use usually due to agreements being in place	
	Project/Programme Calendar	Centralised diary containing all key events in relation to the Project/Programme	
	Purchase Order and Invoice Register		

	Type of Register	Purpose	Additional Notes and Tips
	Quality Register	Used to track and document all quality-related activities throughout a project's lifecycle. It serves as a comprehensive diary of quality events, such as workshops, reviews, inspections, testing, pilots, acceptance, and audits.	The Quality Register is created during the project's initiation phase and is continuously updated as the project progresses.
	Register of Interests	Documents the financial and other interests of the P3M stakeholders.	This register aims to ensure transparency and accountability by listing interests that might influence or appear to influence the stakeholders' duties Can be used to declare any financial interests, gifts, or other benefits they receive.
	Resource Register	List of all individuals (personnel and assets) along with details such as role, cost rate and financial details, skills, location and status	This will likely be captured in the PPM tool for resourced schedules Ensure that name is recorded consistently and when there is a duplicate name i.e. John Smith there is a unique identifier
	Risk Register	Details of risks relating to the project, programme or portfolio	When a risk has materialised, it should be closed on the risk register and recorded in the issues register unless the Risk remains
	Role Access Register	Detailed List of P3 System Access Requirements against each role	Could contain cost information for each role to inform business case and lead time for access info to inform project mobilisation period
	Stakeholder Register	List of contacts that are associated with the project and how and when they should be communicated to.	

	Type of Register	Purpose	Additional Notes and Tips
	Training Register	Record of who has received training. This is particularly important if rolling out a new system or process	
	Value Register	Captures where efficiencies and cost savings have occurred.	