

Salesforce for School-led Project Management Forms – For Schools

This document contains the processes for schools for Kura | School-led projects in Salesforce as of October 2023. To ensure that you have the current processes please see the live training modules in the [Learning Management System](#).

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1. Haere mai, welcome

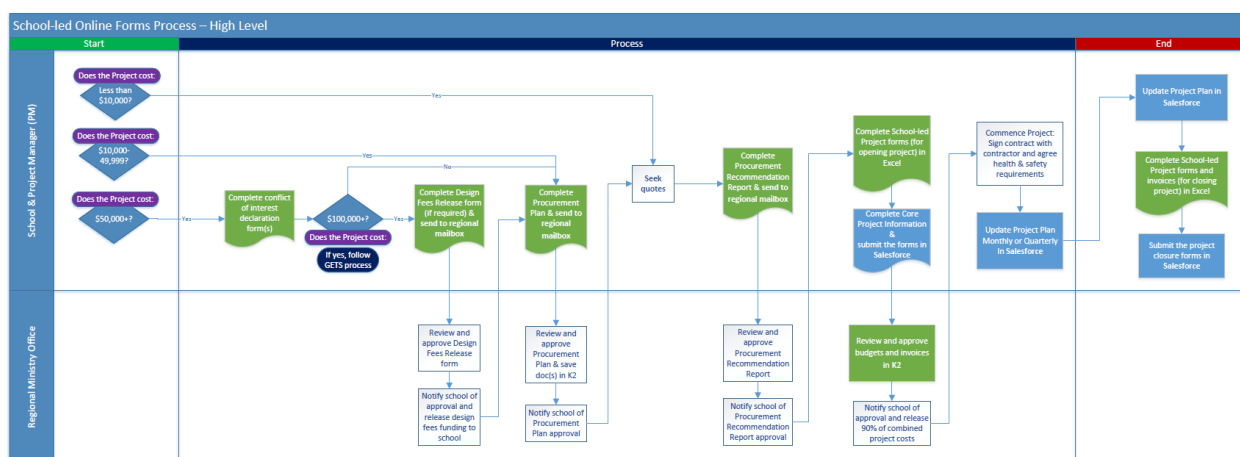
In the past, Kura | School-led projects were solely managed using a suite of Excel and Word-based project management templates. Salesforce has been introduced to streamline and digitise the way we capture Kura | School-led project information.

Salesforce will enable the automatic update of project data, improve data accuracy, and provide better visibility of Kura | School-led projects for schools and the Ministry.

This document will help you through the process of starting a Kura | School-led project using Salesforce. A hybrid model (using both Salesforce and existing Excel and Word-based templates) will be used for new projects until the full end-to-end processes are implemented in Salesforce for procurement and other processes for Kura | School-led projects.

1.1. Process

The process map below shows which parts of the process are completed in Salesforce, and which parts are completed using existing templates.



When a project starts the school and project manager must do the following:

1. If the project is over \$10,000, a procurement plan must be completed and sent to the school's Property Advisor for endorsement.
2. If the project is over \$50,000, conflict-of-interest forms must be completed by each member of the procurement evaluation panel and a procurement plan must be completed and sent to the school's Property Advisor for endorsement.
3. If the project is \$100,000 or more, the school can complete a Design Fees Release form to release up to 10% of the project budget to pay for design fees. This form must be sent to the Regional Ministry Office mailbox for approval. A procurement plan must be completed and sent to the school's Property Advisor for endorsement.
4. Project Managers and schools must seek quotes for the project. For further information on Ministry requirements for quotes please see the [Planning Property Procurement webpage](#).
5. A Procurement Recommendation Report must be completed and sent to the school's Property Advisor for endorsement.
6. The school-led project opening must be completed in the required templates and submitted through the Salesforce platform.
7. The core project Information must be completed in Salesforce. Once approved by the Ministry, the school and project manager will receive notification and the project can progress.
8. The project commences and the project manager arranges contracts to be signed and Health and Safety requirements.

March 2024 v2

9. During the project, the Project Plan must be updated in Salesforce monthly if the project is over \$200,000 or quarterly for projects under \$200,000.

To close a project, the Project Manager must:

1. Update the Project Plan in Salesforce.
2. Complete the closing Kura | School-led forms and have them approved by the school.
3. Submit the closing forms in Salesforce.

2. Requesting Access to Salesforce through Education Sector Logon (ESL)

Access to Salesforce is managed through your ESL account. You will need to ask your school's ESL Online Delegated Authoriser to give you access to Salesforce.

If you do not know who your school's ESL Online Delegated Authoriser is, please contact the Education Service Desk at service.desk@education.govt.nz.



2.1. ESL Online Delegated Authoriser to Invite User

ESL Online Delegated Authorisers are responsible for giving and removing access to Salesforce for their school's Property Delegated Financial Authorisers and other school users. Note, if a Project Manager needs access to Salesforce they will need to use the process found [here](#).

Step 1: Log into the ESL Delegated Authoriser Account

Log into your ESL Online Delegated Authoriser account. You can access this link through the [Ministry Website](#).

Ensure that you have clicked on the ESL Online Delegated Authoriser link.

Role name	Login link
Delegated Authoriser	ESL Online Delegated Authoriser 
Users (e.g. School Administrators, Principals)	ESL Self-Service 

Step 2: Invite User

The fields marked *requires EOI* can only be changed where you have sighted Evidence of Identity (EOI) documentation in accordance with your delegated authority and the Terms of Use.

Select "Invite user" from the left-hand menu.

Delegated authoriser | [Logout](#)

User management

- Search users >
- Invite user >**
- Search invites >
- Review users' access >

Reporting

- Create >
- Download >

Access

- Self service >
- Feedback survey >
- Delegated authoriser help >

Title

Given name (requires EOI)
User

Middle name (requires EOI)

Preferred name

Surname (requires EOI)*
One

Date of birth (DD/MM/YYYY) (requires EOI)*
11/11/70

Gender (requires EOI)*
Female

Email address*

Phone number

Date of EOI check (I have sighted EOI documentation in accordance with my delegated authority and the Terms of Use.)*
DD/MM/YYYY

Organisation*
(6001) Aoraki Polytechnic

Step 3: Enter User Details

Enter the user's details as they appear on their Evidence of Identity documents.

Delegated authoriser | [Logout](#)

Invite user

The fields marked *requires EOI* can only be changed where you have sighted Evidence of Identity (EOI) documentation in accordance with your delegated authority and the Terms of Use.

Title

Given name (requires EOI)
User

Middle name (requires EOI)

Preferred name

Surname (requires EOI)*
One

Date of birth (DD/MM/YYYY) (requires EOI)*
11/11/70

Gender (requires EOI)*
Female

Email address*

Phone number

Date of EOI check (I have sighted EOI documentation in accordance with my delegated authority and the Terms of Use.)*
DD/MM/YYYY

Once the required fields have been filled out, a list of standard roles will display.

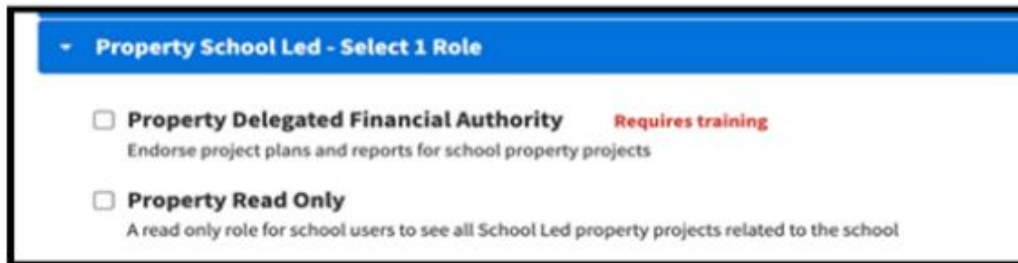
Step 4: Choose a role

From the list of standard roles find the **'Property School Led – Select 1 Role'**

Select the **Property Delegated Financial Authority** role if you are inviting a school user who will be approving your school's projects. This is usually the Presiding Member of the Board. If this is not the Presiding Member of the Board, then the user (such as the school Principal) will have to attach the Board minutes in which delegation was transferred over to them. Please refer to the [Financial Information for Schools Handbook section 2.5 for more information.](#)

Select the **Property Read Only** role for users who will need to view information on your projects, but who will not be authorising in Salesforce.

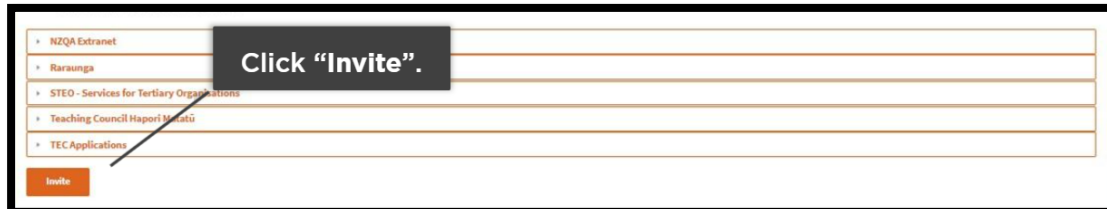
If you are a **School Project Manager** you must complete the [Access Request Form](#) on the Ministry website. This should then be submitted to your regional office.



Property School Led - Select 1 Role

- Property Delegated Financial Authority** Requires training
Endorse project plans and reports for school property projects
- Property Read Only**
A read only role for school users to see all School Led property projects related to the school

Step 5: Finish inviting User



Click "Invite".

- NZQA Extranet
- Raranga
- STEO - Services for Tertiary Organisations
- Teaching Council Hapori Mātahi
- TEC Applications

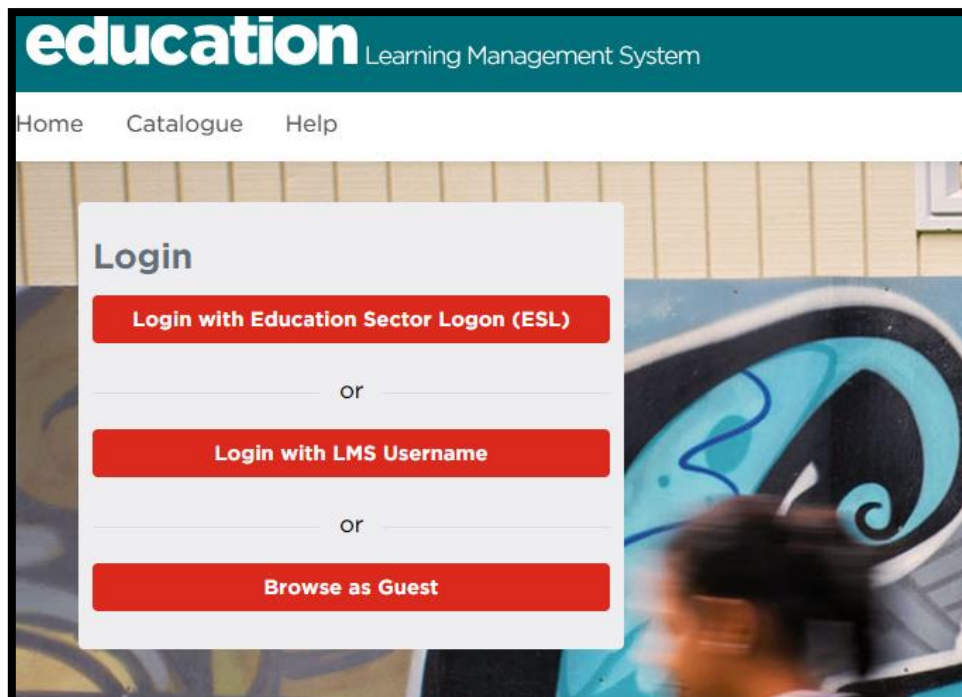
Invite

2.2. Salesforce Training for the Property Delegated Financial Authority

Once you have been given access to Salesforce by your School ESL Online Delegated Authoriser you will be sent an invitation to complete the required training.

Step 1 - Access the Learning Management System

Once you have received the invitation from the Ministry's Training Services Team, go to our [Education Learning Management System](#) and Login with your **ESL account**.



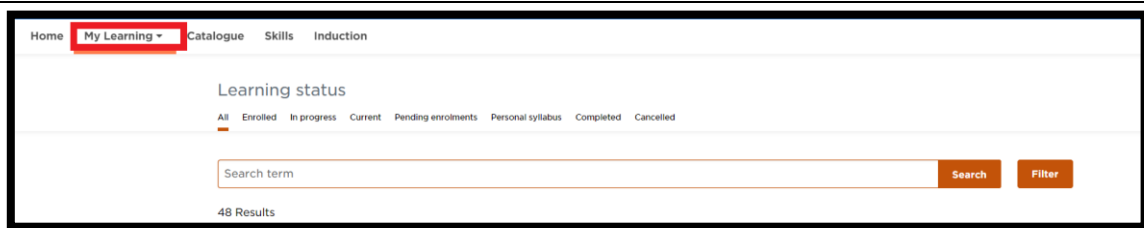
education Learning Management System

Home Catalogue Help

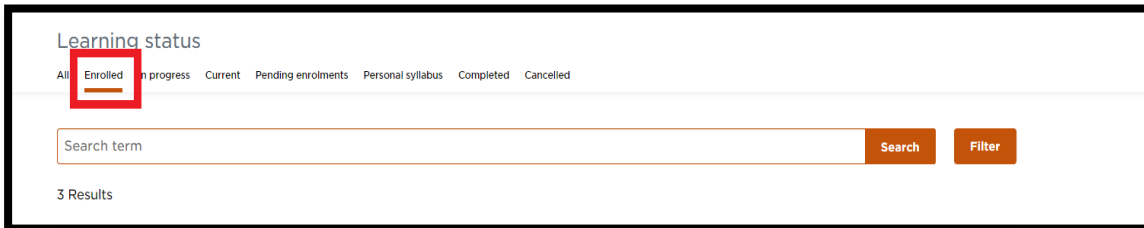
Login

- Login with Education Sector Logon (ESL)
- or
- Login with LMS Username
- or
- Browse as Guest

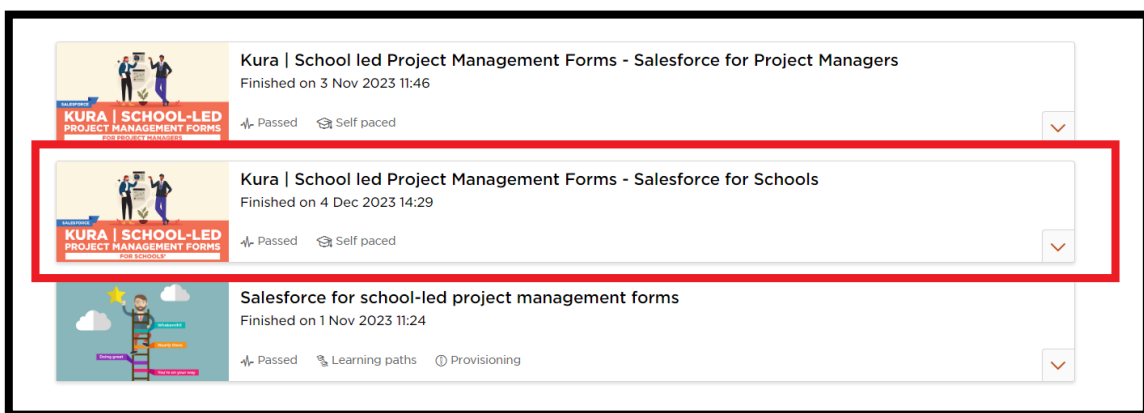
Step 2 - Click on the 'My Learning' tab



Step 3 - Click on 'Enrolled'



Step 4 - Search for 'Kura | School led Project Management Forms – Salesforce for Schools'



Once training has been completed, the Ministry Education Service Desk will approve your access to Salesforce. Please allow 1-2 business days for this to occur.

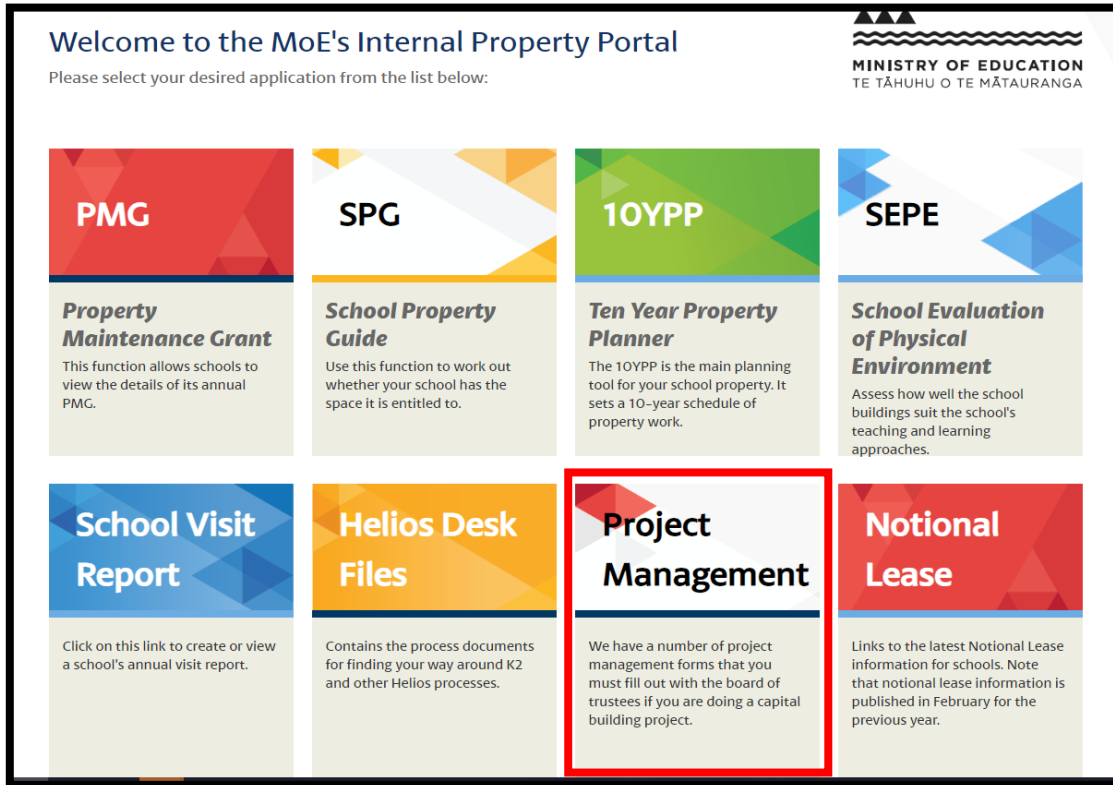
Please log into [Salesforce](#) once you have been approved by the Education Service Desk. Logging in activates your account and allows your Project Manager to submit your school's projects.

3. Logging into Salesforce

To log into Salesforce, follow the steps below:

Step 1 - Open the Property Portal

You can access Salesforce through your browser by using this [link](#) or going to the [Property Portal](#) and clicking the Project Management tab.

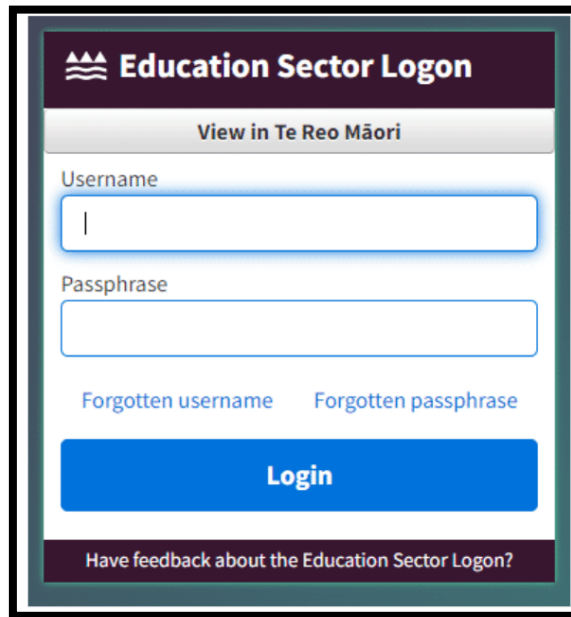


This will lead you to the website containing the link to Salesforce and other Kura | School-led project templates.

You can save the link to your bookmarks to make finding Salesforce easier.

Step 2 – Login with your ESL account

When logging into ESL choose 'Ministry of Education' as your organisation



The image shows a login form for the Education Sector Logon. At the top, there is a dark purple header with a logo of three white triangles above the text "Education Sector Logon". Below this is a grey button labeled "View in Te Reo Māori". The form contains two input fields: "Username" with a blue border and a vertical cursor, and "Passphrase" with a blue border. Below the fields are two links: "Forgotten username" and "Forgotten passphrase". A large blue button labeled "Login" is positioned below the links. At the bottom of the form is a dark purple footer with the text "Have feedback about the Education Sector Logon?".

Education Sector Logon

[View in Te Reo Māori](#)

Username

Passphrase

[Forgotten username](#) [Forgotten passphrase](#)

Login

[Have feedback about the Education Sector Logon?](#)

4. Support and Resources

Support

You can see the [live module](#) at any point to support you in completing project paperwork. If you have questions on the project forms or the process, please contact your regional office or local Property Advisor.

For technical questions related to ESL or Salesforce, you can contact the Ministry of Education Service Desk on 0800 422 599

Schools can also complete the *Kura | School Led Project Management Forms - For Project Managers* in the [Learning Management System](#) to gain an understanding of the process that project need to go through to submit a project.

You can also contact your regional office if you have any further questions or need support.

ESL Delegated Authorisers can find extra information on their role by going to the [Education Learning Management System](#) and completing the *ESL Delegated Authoriser Training* module.

Resources

[Kura | School-led Project Forms](#)

[Property Portal](#)

[Contracts for School-led Property Projects and Maintenance](#)

[How to get Access to Helios and Salesforce for School-led Projects](#)