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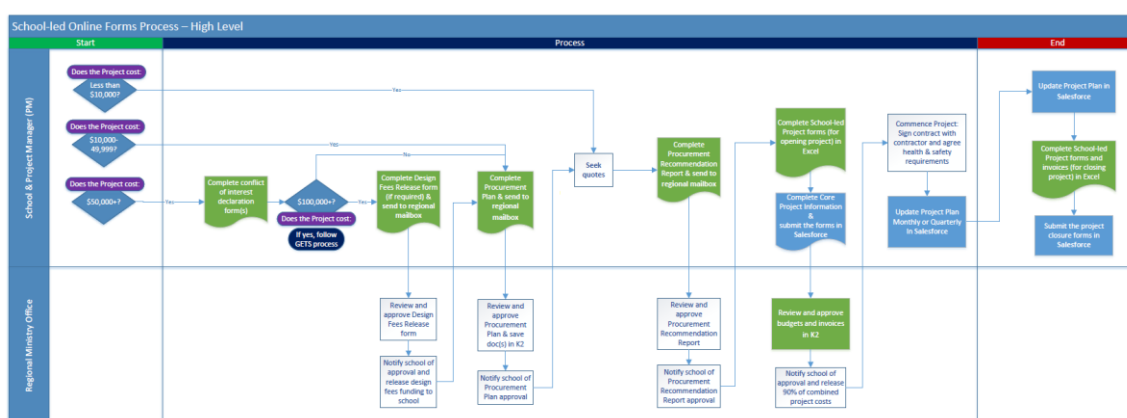
When a project starts the school and project manager must do the following:

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.

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

Step 3: Enter User Details

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.

Step 5: Finish inviting User

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**.

Step 2 - Click on the 'My Learning' tab
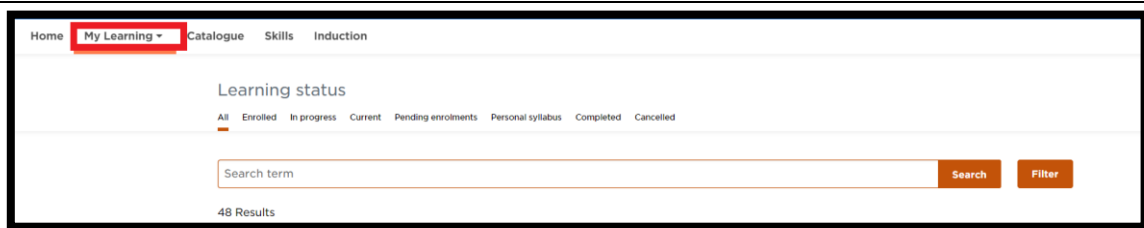
Step 3 - Click on 'Enrolled'
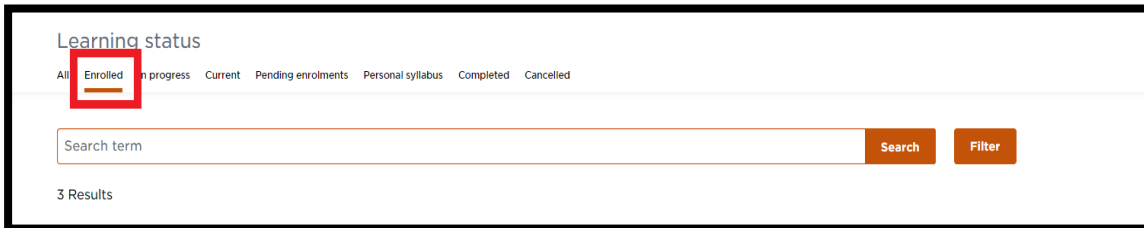
Step 4 - Search for '*Kura | School led Project Management Forms – Salesforce for Schools*'
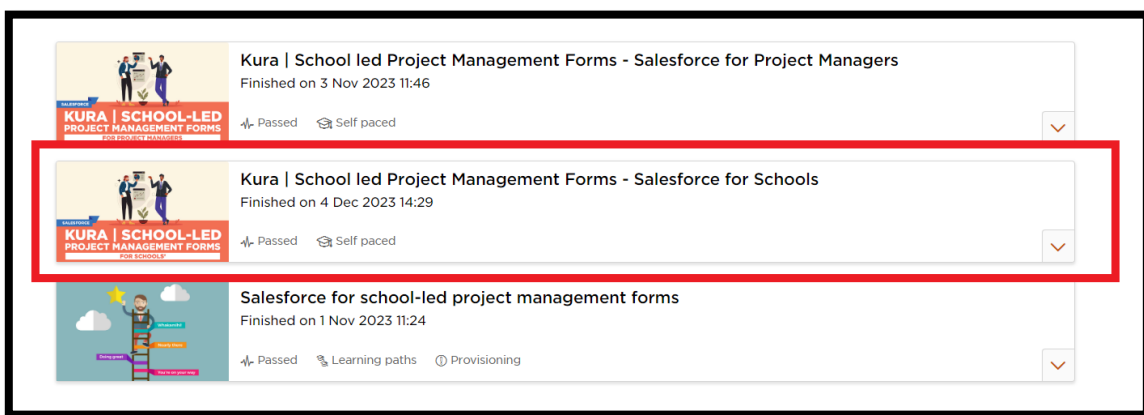
Once training has been completed, the Ministry Education Service Desk will approve your access to Salesforce. Please allow 1-2 business days for this to occur.

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.
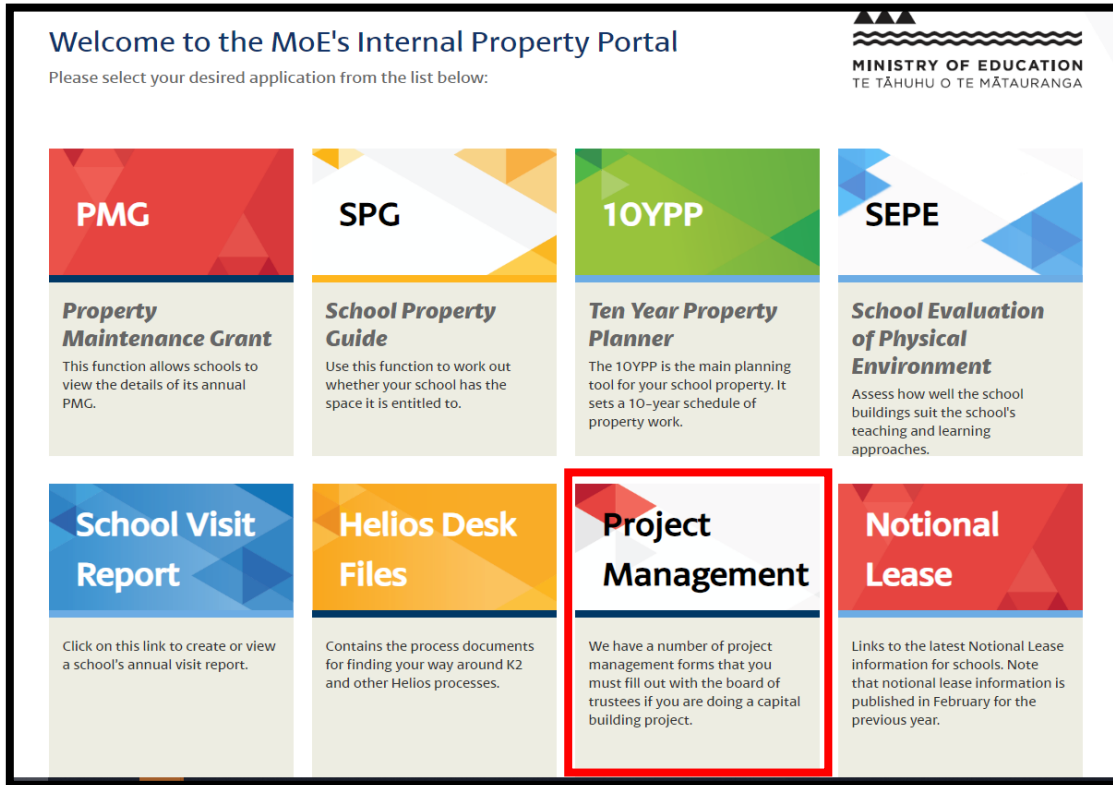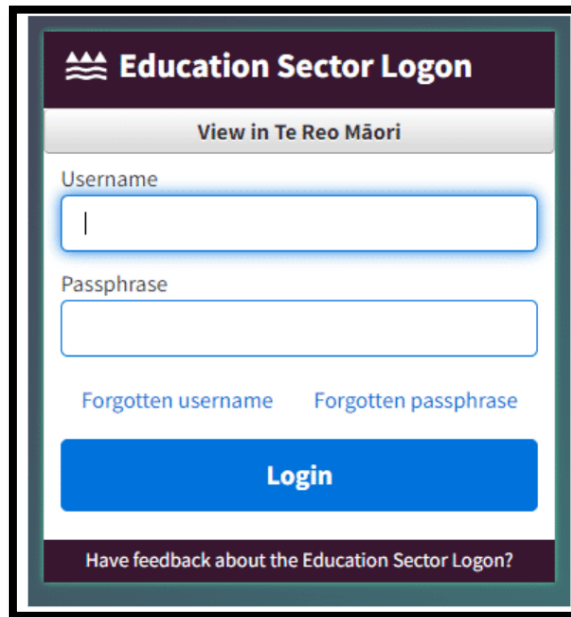
This will lead you to the website containing the link to Salesforce and other Kura |School-led project templates.
You can save the link to your bookmarks to make finding Salesforce easier.

Step 2 – Login with your ESL account

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

Step 3 – Go to the 'Project List'

When you reach the landing page click on 'Projects list'
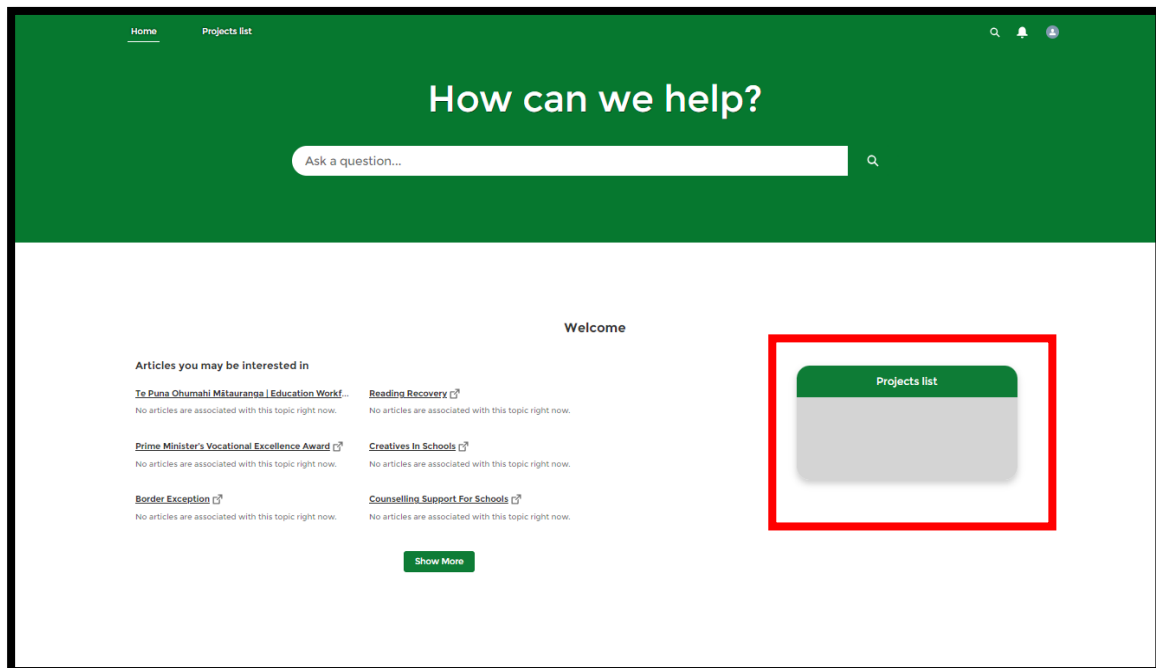
4. How to Find a Project

Once you have logged into Salesforce and selected the school, the landing page will allow you to find a project easily.

Selecting your Project
Click on the 'Project Reference' of the project you want to open or click 'View All' to navigate to the full list of projects available at your school.

The 'Project Name' column will give you a description of each project.

The 'Project Number' corresponds to the Ministry of Education K2 project number.

If you are unsure of the 'Project Number' and 'Project Reference number', please check the email notification you received to review this project. This email will also have a link that will bring you to the relevant project.

Project Details

Clicking on a project reference will bring you to the 'Project Details' screen.
Click 'Project List' on the top left of the screen to return to the list of Kura | School-led projects.

5. How to View Project Scope

Step 1 - Click on the 'Scope' tab.

Step 2 - Click on each project activity to get more information.

Step 3 – The 'Project Activity Detail' Screen

The 'Project Activity Detail' screen will appear.

6. Project Endorsement

When a project is submitted by your Project Manager, the Property Delegated Financial Authority (DFA) will be sent a notification requesting them to review and endorse or decline the project.

The school's Property DFA is responsible for reviewing the project information submitted by the Project Manager. They will either endorse the project to proceed through for Ministry of Education approval or reject it so that the Project Manager can update the information.

To endorse a project, you need to:

- endorse each associated project document
- ensure that the suppliers listed are in accordance with the procurement documentation
- review and endorse the costs associated with the project

- endorse the baseline plan.

To reject a project, you need to do both of the following actions:

- reject the relevant project document or project baseline plan,
- reject the whole project in the project detail screen.

6.1. Review and Endorse or Reject the Project Baseline Plan

Step 1 – Find the Project Baseline Plan

Click on the Project Plan hyperlink in the 'Project Plans' section. This can be found on the right-hand side of your screen.

Step 2 – The 'Project Plan Screen'

Once you have selected a Project Plan you will be taken to the 'Project Plan screen'. The key areas of this screen are:

1. Return to 'Project Detail' screen by clicking this link.
2. 'Project Costs' shows the amount of funds already spent (Work in Progress) and the forecast for when funding will be spent throughout the project.
3. The project timeframes by phase.
4. 'Estimated total project costs' is the estimated total project cost, including both Ministry budgets and Board contributions.

Step 3 – Estimated Project Costs

Click on 'View All' in the 'Project Costs' Section.

This will show you the Work in Progress (funds already spent on the project) and the monthly forecast of future project spend. The forecast shows when Ministry budgets will be spent. Check the project forecast to ensure it is as expected.

To return to the 'Project Plan' screen, click the 'Project Plan' link at the top left corner.

Step 4 – Endorse or Reject Project Plan
Once you have reviewed all sections of the project baseline plan, record your review outcome by changing the Project Baseline Plan status to endorsed.

You can do this by clicking 'Endorsed' or 'Rejected' in the 'Project Plan Status' bar at the top of the screen and clicking on 'Mark as Current Project Plan Status'.

NOTE: You need to endorse the project baseline plan before endorsing the project as a whole.

OR
Click the pencil next to the 'Project Plan Status'

Choose endorse or reject from the drop-down field by choosing either 'Rejected' or 'Endorsed' from the drop-down menu then click 'Save'.

6.2. Review and Endorse or Reject Project Documents

The Project Manager is responsible for providing all project documents required for approval of the project. The school's Property DFA is required to review all documents to check they are comfortable with the project. This includes ensuring that each required project document is attached and that this attachment has been reviewed.
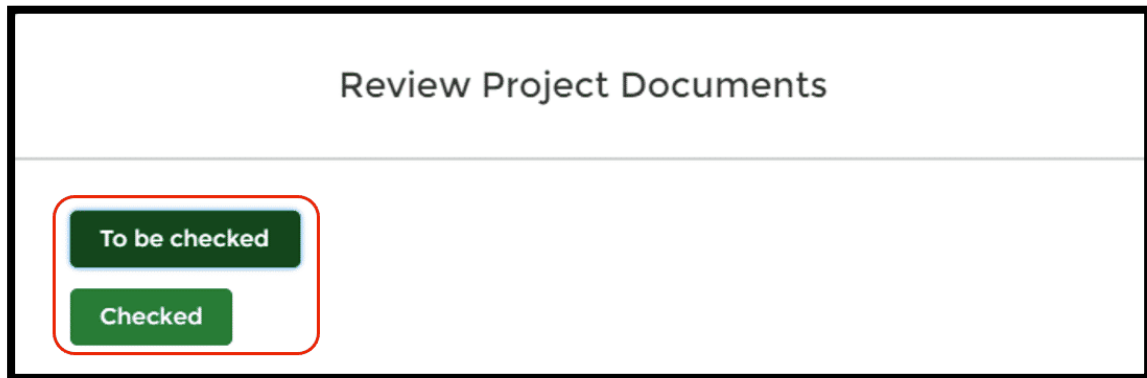
Step 1 – Review the Project Documents
When in the Project Detail Screen click on 'Review Project Documents' on the top right of your screen.
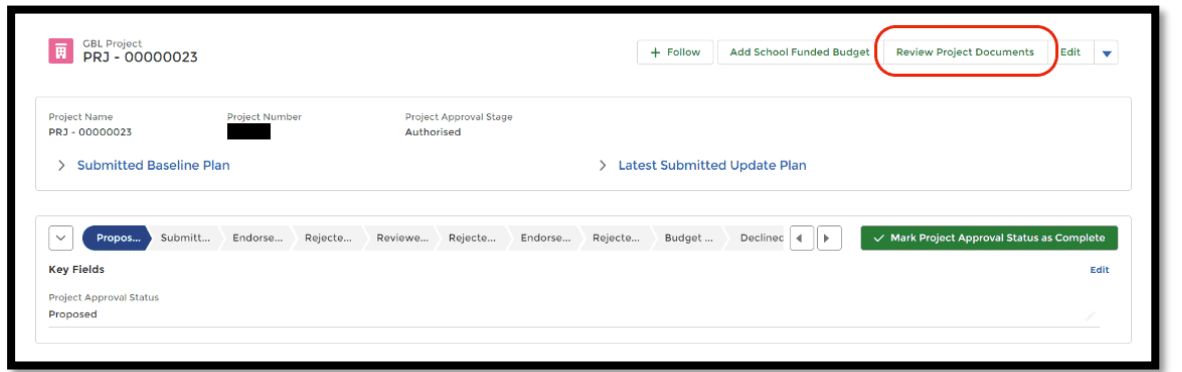
Step 2 – Go to 'To be Checked'

To view project documents that need to be endorsed by the school, click on 'To Be Checked'.

To view project documents that you have already endorsed click 'Checked'

Step 3 - Review or Decline Project Documents

You will now see the document details screen. From here you can:

1. Select the preview screen to view the full document and review its content.
2. Once you have reviewed the document, select 'Reviewed' to endorse the document or 'Decline' to decline the document from the 'School DFA Review' drop down.
3. Leave any notes required.
4. Click 'Next' to see the next document.

Step 5 – Complete reviewing project documents
Complete for all project documents. Click 'Done' once you have reached the end.

6.2.1. Attaching a Project Document

You can attach an additional project document in Salesforce, such as the Board Minutes where the Board officially delegates the Delegated Financial Authoriser to a school staff member.

To attach a project document, click the 'New Checklist Record' button on the top of the screen.
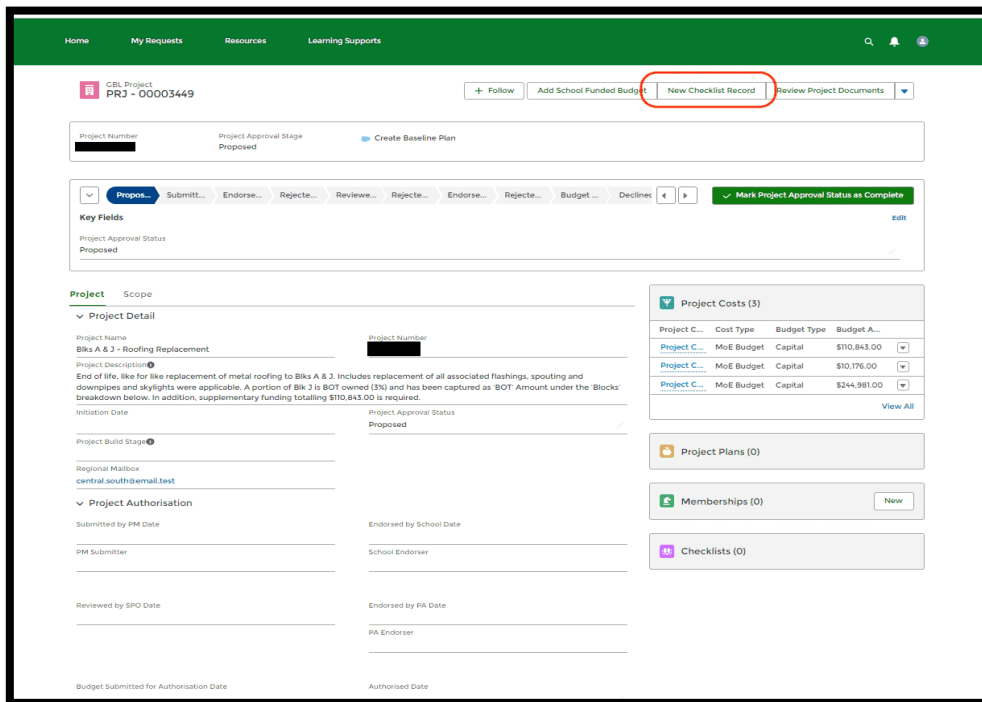
Choose the document stage from the drop-down. For opening a project, this should be 'Opening'.
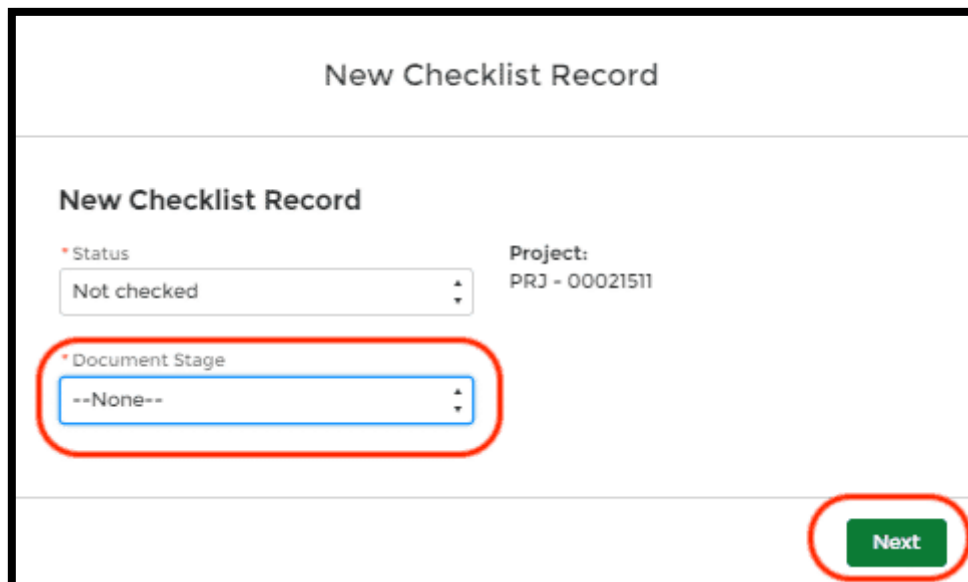
Choose the type of project document it is from the Document Name drop-down (e.g., Design Certificate).
Click 'Next' to create the checklist record.

The checklist item will now appear in the 'Checklist' section of the page, and you can now attach the corresponding document.

Click on the checklist document link.

Click on the 'Upload Files' button in the top right-hand corner. You can now upload or drag and drop the document to be saved.

6.3. How to Review Suppliers

Suppliers are the Contractors who have tendered for the project and are recorded in the Procurement Recommendation Report.

Step 1 – Memberships

You will find the suppliers in the membership area of the 'Project Plan' screen.

Step 2 – More Supplier Information

Click on the supplier's name for more detailed information.

Step 3 – Review Suppliers

Review that the supplier list is reflected in the Procurement Recommendation Report and that it is in accordance with the procurement process.

When you are ready, you can return to the project detail screen by clicking on the blue link under the title project.
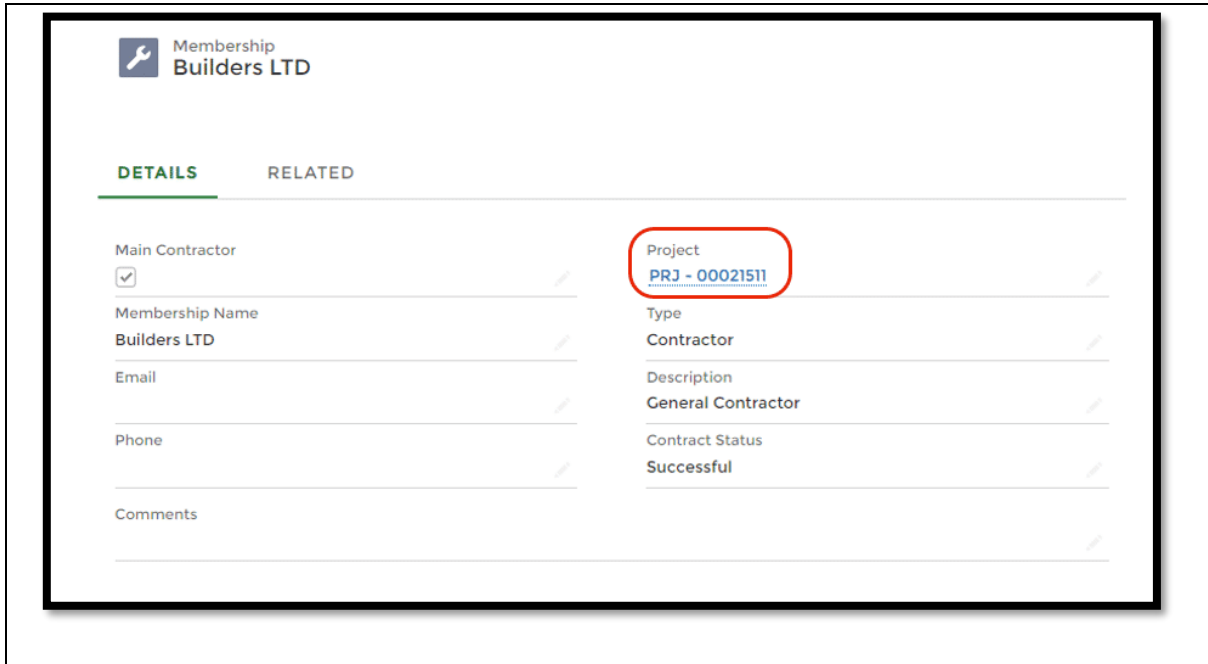
6.4. Endorse or Reject the Project

Once you have reviewed the Project Plans, endorsed the project documents and reviewed the project memberships you can now endorse or reject the project.

Step 1 – Project Detail Screen
Navigate to the 'Project Detail' Screen

Step 2 – Endorse or Reject a Project

You can then either choose to endorse the project by clicking the 'Endorsed by the school' project status or reject the project by clicking the 'Rejected by the school' project status.

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Step 3 – 'Mark Project Approval Status as Complete'

Click on 'Mark Project Approval Status as Complete'

NOTE: If a Project Plan or the relevant project documents have not been endorsed, you will be unable to proceed with endorsing a project.

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](#)