

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

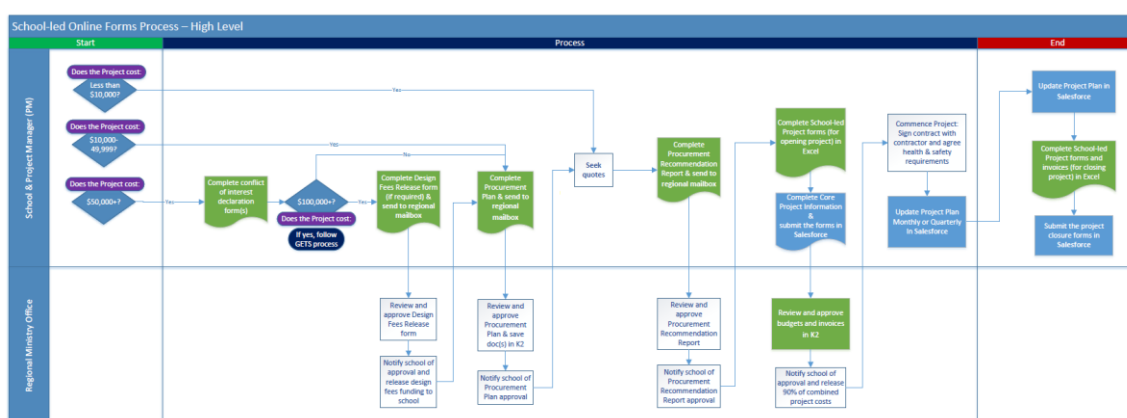
In the past, Kura | School-led projects were solely managed using a suite of Excel and Word-based project management templates. Salesforce has been introduced to streamline and digitise the way we capture Kura | School-led project information.

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.

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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.

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)

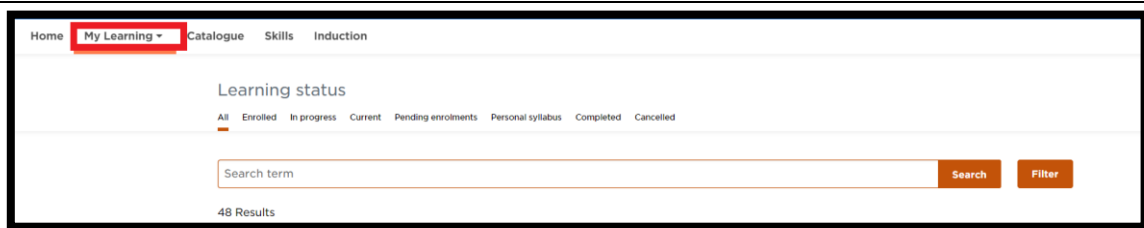
or

Login with LMS Username

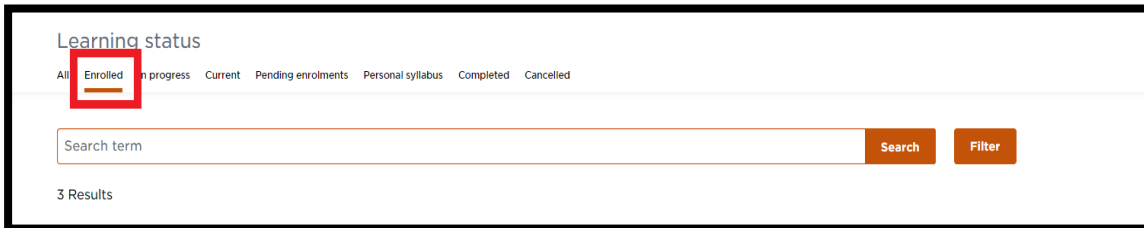
or

Browse as Guest

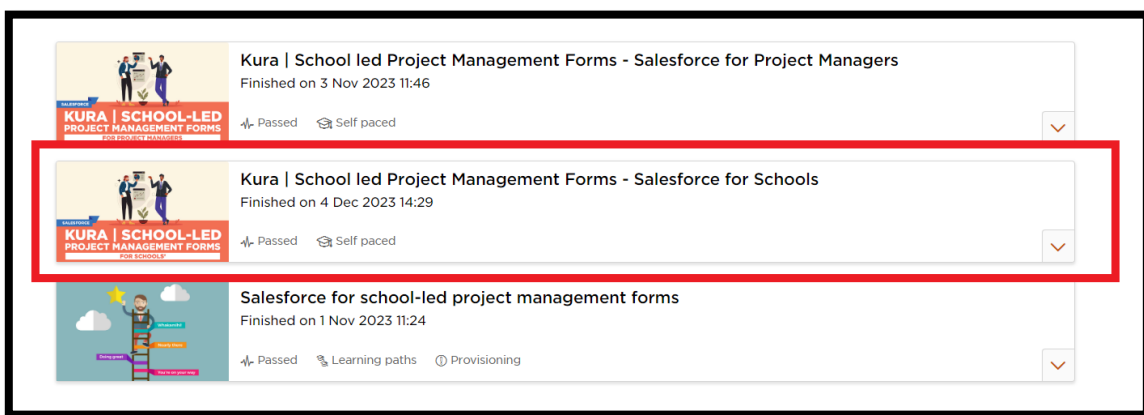
Step 2 - Click on the 'My Learning' tab



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.

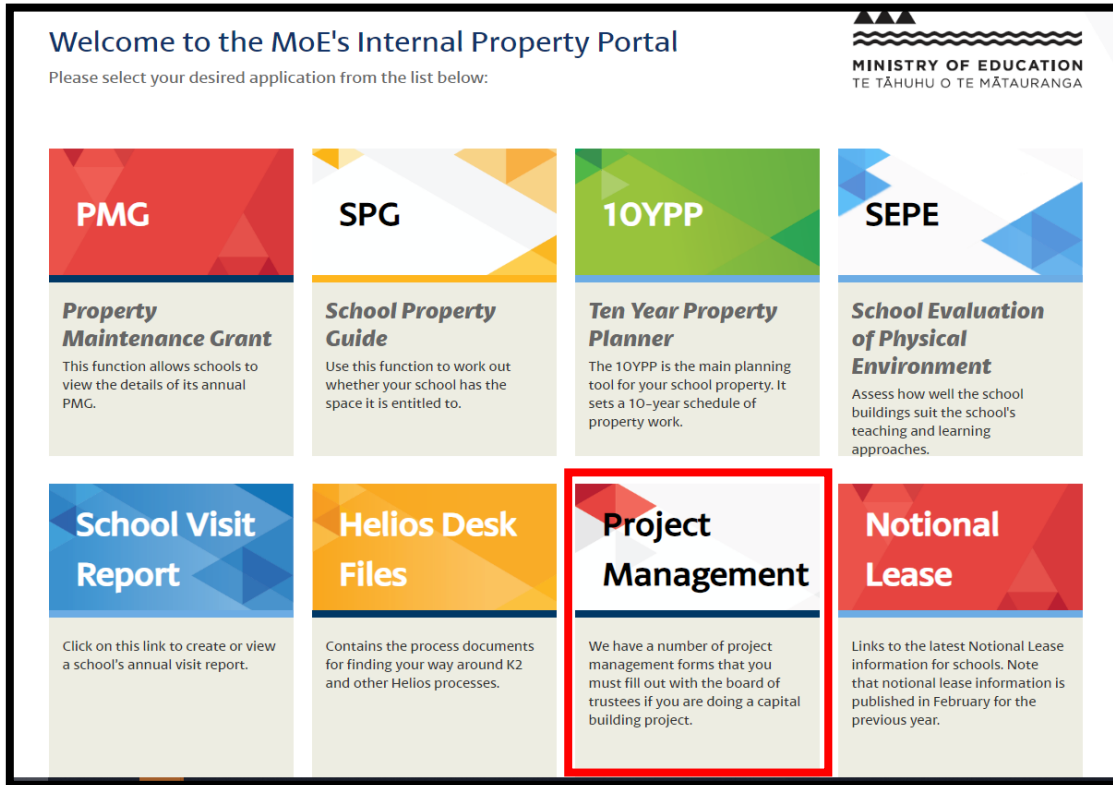
Please log into [Salesforce](#) once you have been approved by the Education Service Desk. Logging in activates your account and allows your Project Manager to submit your school's projects.

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.

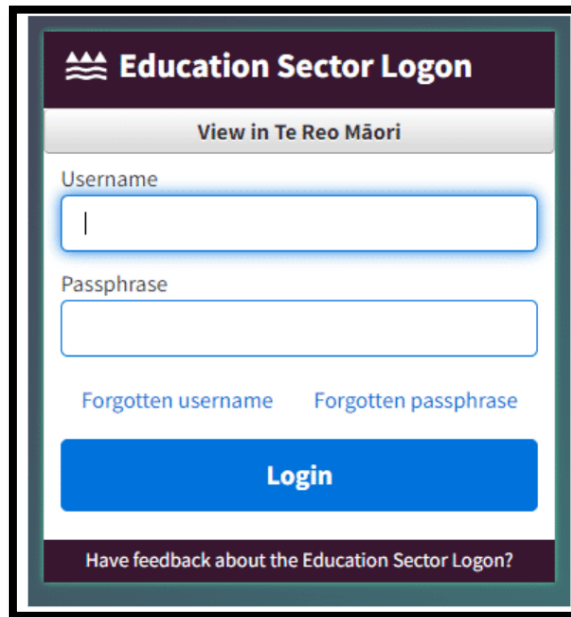


This will lead you to the website containing the link to Salesforce and other Kura | School-led project templates.

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

Step 2 – Login with your ESL account

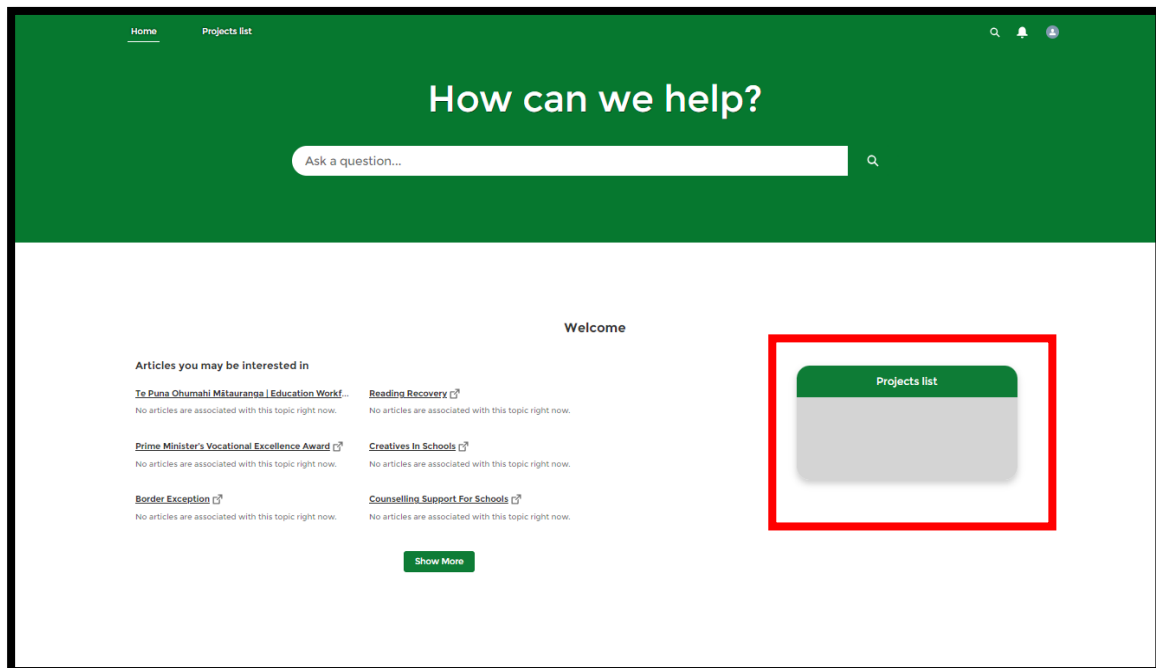
When logging into ESL choose 'Ministry of Education' as your organisation



The image shows a login form for the Education Sector Logon. At the top, there is a dark purple header with the Education Sector logo (three white triangles above three wavy lines) and the text "Education Sector Logon". Below the header is a grey button that says "View in Te Reo Māori". The form contains two input fields: "Username" and "Passphrase". Below these 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?".

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.

Project Reference	Project Name	Project Number	Project Approval Status
PRJ - 00021511	11,2,5,9,10,12,14,A,B,C,J,E YR7STA,GYM Electrical SB & LED L...	██████	Proposed
PRJ - 00021515	9, 10, 12: Accessway Handrails	██████	Proposed
PRJ - 00021517	Block 9: Gym Entry & Roller Doors	██████	Proposed
PRJ - 00021518	SIP, 10,11: Work space creation and kitchen benches	██████	Proposed
PRJ - 00021519	SIP, 12: Dividing wall and kitchen bench	██████	Proposed
PRJ - 00021520	SIP, 9: New office space upstairs	██████	Proposed
PRJ - 00021521	SIP, Site: Field Drainage	██████	Proposed
PRJ - 00021522	SIP, Site: Seats and Shading	██████	Proposed
PRJ - 00021523	Site: CCTV	██████	Proposed

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.

The screenshot shows the 'Project Details' page for project 'PRJ - 00021511'. The top navigation bar has 'Home' and 'Projects list' (circled in red). The main content area includes:

- Project Name: 11,2,5,9,10,12,14,A,B,C,J,E YR7STA,GYM Electrical SB & LED Lighting Replacement
- Project Description: and replacement of fuses to RCD fuses. Lighting in Block A, B, C, STA, CYM require replacement with LED lighting. Switchboards in Block A, B, C STA & Gym require upgrades
- Initiation Date: 13/07/2023
- Project Approval Status: Proposed
- Project Build Stage: Proposed
- Regional Mailbox: northern@mail.kura.govt.nz
- Project Authorisation: Submitted by PM Date, Endorsed by School Date, PM Submitter, School Endorser, Reviewed by SPO Date, Endorsed by PA Date, SPO Reviewer, PA Endorser
- Project Costs (3): Table with columns Project C..., Budget Fa..., Budget Type, Budget A...
 - Project C... SVA Capital \$124,271.45
 - Project C... FIVE SPDIS... Capital \$58,005.77
 - Project C... JNO_CAPL... Capital \$4,922.00
- Project Plans (3): Table with columns Project Pl..., Record Type, Project Pla..., Project Pla...
 - PP-00001... School Led... Endorsed 13/07/2023
 - PP-00001... School Led... Submitted 13/07/2023
 - PP-00001... School Led... Draft 13/07/2023
- Memberships (1): Table with columns Members..., Type, Description, Main Contr...
 - Builers L... Contractor General Co... [checked]

5. How to View Project Scope

Step 1 - Click on the 'Scope' tab.

The screenshot displays a project management dashboard for 'CBL Project PRJ - 00021511'. At the top, there are navigation options: '+ Follow', 'Add School Funded Budget', 'New Checklist Record', and 'Review Project Documents'. Below this, the project details are shown, including the 'Project Approval Stage' as 'Authorised' and a 'Submitted Baseline Plan' link. A central navigation bar contains several action buttons: 'Propos...', 'Submitt...', 'Endorse...', 'Rejecte...', 'Reviewe...', 'Rejecte...', 'Endorse...', 'Rejecte...', 'Budget ...', 'Decline', and a green 'Mark Project Approval Status as Complete' button. The 'Scope' tab is highlighted with a red circle. The main content area is divided into 'Project Detail' and 'Project Authorisation' sections. The 'Project Detail' section includes fields for Project Name, Project Number, Project Description, Initiation Date, Project Build Stage, Regional Mailbox, Project Approval Status, and Budget Submitted for Authorisation Date. The 'Project Authorisation' section includes fields for Submitted by PM Date, PM Submitter, Reviewed by SPO Date, SPO Reviewer, Budget Submitter, Closed by PM Date, and Closed by PM. The right-hand sidebar contains four sections: 'Project Costs (3)', 'Project Plans (1)', 'Memberships (1)', and 'Checklists (6+)'. Each section contains a table of related items with links to view more details.

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

Activity Number	Block/Asset Name	Scope of Work Comments	Scope of Work Description
ACT - 00000005	Block 1 -Boiler Room/Roofing	Replace clear sheet with new trafficable sheeting.\n- Install cap flashing over split sheet.\n- Replace gutter.	Specialist roofing report identified defects that need to be addressed.\t
ACT - 00000006	Block A -Roofing	- Replace clear sheet with new trafficable sheeting.\n- Install cap flashing over split sheet.\n- Replace gutter.	Specialist roofing report identified defects that need to be addressed.\t
ACT - 00000007	Block A -Classrooms/Windows	- Replace roof overhang flashings above window joinery with a greater drip edge to prevent water tracking under and onto window frames. \n	High level windows currently allow water to track and pool at the base.

Step 3 – The ‘Project Activity Detail’ Screen

The ‘Project Activity Detail’ screen will appear.

Project Activity
ACT - 00000005

DETAILS RELATED

Activity Number
ACT - 00000005

Project
[PRJ - 00000023](#)

Owner
School Led Central South

Block/Asset Name
Block 1 -Boiler Room/Roofing

Scope of Work Description
Specialist roofing report identified defects that need to be addressed.\t

Scope of Work Comments
Replace clear sheet with new trafficable sheeting.\n- Install cap flashing over split sheet.\n- Replace gutter.

Created By
[Redacted], 7/06/2023, 2:51 pm

Last Modified By
[Redacted], 8/06/2023, 9:43 am

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

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- 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.

The screenshot displays a project detail interface. At the top, there is a navigation bar with buttons for 'Submit...', 'Endorse...', 'Reject...', 'Review...', 'Decline', and 'Mark Project Approval Status as Complete'. Below this is a 'Key Fields' section with 'Project Approval Status' and 'Submitted by PM'. The main content area is divided into several sections:

- Project Detail:** Includes 'Project Name' (1, A, B, C, F, P, M, R, V, W, Roofing and Electrical Works), 'Project Number' (redacted), 'Project Build Stage' (Initiation), and 'Project Description' (This project addressed the priority 2 roofing and electrical works identified in the specialist reports and condition assessment.).
- Project Authorisation:** Includes fields for 'Submitted by PM Date', 'PM Submitter', 'Reviewed by SPO Date', 'Budget Submitted for Authorisation Date', 'Closed by PM Date', and 'Closed by PM'.
- Project Costs (2):** A table showing project costs with columns for Project C..., Cost Type, Budget Type, and Budget A....
- Project Plans (1):** A table showing project plans with columns for Project Pl..., Record Type, Project Pla..., and Project Pla... The entry 'PP-0000...' is circled in red.
- Memberships (1):** A table showing memberships with columns for Members..., Type, Description, and Main Contr... The entry 'bob' is listed as a Contractor.

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.

The screenshot shows a 'Project Plan' page for 'PP-0000112'. At the top, there are buttons for '+ Follow', 'Edit', and 'Printable View'. Below this is a progress bar with 'Endorsed' and 'Rejected' segments, and a green button 'Mark Project Plan Status as Complete'. A 'Key Fields' section shows 'Project Plan Status' as 'Endorsed'. The main content is divided into sections: 'Project Plan Details', 'Planning Phase', 'Design Phase', 'Construction Phase', 'Close Out Phase', and 'Estimated Total Costs'. A 'Project Costs (3)' table is also visible. Annotations 1-4 are placed on the interface: 1 points to the 'Project Name' field, 2 points to the 'Project Costs' table, 3 points to the 'Design Actual Finish Date' field, and 4 points to the 'Estimated Total Costs' section.

Project C...	Month / Y...	Forecast T...	Forecast P...
Project C...	Jun/2023	CAPEX	Monthly
Project C...		OPEX	Work In Pr...
Project C...		CAPEX	Work In Pr...

Step 3 – Estimated Project Costs

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

Project Plan PP-0000785

+ Follow Edit Printable View

Submitted Endorsed Rejected **Mark Project Plan Status as Complete**

Key Fields
Project Plan Status Submitted

Project Plan Details

Project Plan Status Submitted
PM Submitted by Luisa Agas-PM
PM Submitted Date 23/08/2023, 9:41 am

Planning Phase

Planning Baseline Start Date 6/08/2023
Planning Baseline Finish Date 11/08/2023

Design Phase

Design Baseline Start Date 11/09/2023
Design Baseline Finish Date 1/10/2023

Construction Phase

Construction Baseline Start Date 29/10/2023
Construction Baseline Finish Date 3/12/2023

Project Name PIR2 - 00022218
Record Type School Led Baseline
Project Plan Date

Project Costs (6+)

Project C...	Month / Y...	Forecast T...	Forecast P...
Project C...	Aug/2023	CAPEX	Monthly
Project C...	Sep/2023	CAPEX	Monthly
Project C...	Oct/2023	CAPEX	Monthly
Project C...	Nov/2023	CAPEX	Monthly
Project C...	Dec/2023	CAPEX	Monthly
Project C...	Jan/2024	CAPEX	Monthly

View All

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.

Project Plans > PP-0000168
Project Costs

5 items • Updated a few seconds ago

Project Cost Name	Month / Year	Forecast Type	Forecast Period Type	Amount
Project Cost 026346	Jun/2023	CAPEX	Monthly	
Project Cost 026347	Jul/2023	CAPEX	Monthly	\$9,000.00
Project Cost 026348	Aug/2023	CAPEX	Monthly	\$1,000.00
Project Cost 026349		OPEX	Work in Progress	
Project Cost 026350		CAPEX	Work in Progress	

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.

Project Plan PP-0000177

+ Follow Edit Printable View

Submitted Endorsed Rejected **Mark as Current Project Plan Status**

Key Fields
Project Plan Status Submitted

OR

Click the pencil next to the 'Project Plan Status'

The screenshot shows a web interface for managing project plan status. At the top, there is a progress bar with three segments: a green segment with a checkmark, a grey segment with a checkmark, and a blue segment labeled 'Endorsed'. Below this is a 'Key Fields' section with a dropdown menu and the text 'Project Plan Status' and 'Endorsed'. The main section is titled 'Project Plan Details' and contains several fields: 'Update Type' (with a dropdown), 'Project Plan Status' (with a dropdown and a pencil icon circled in red), 'Project Plan Date' (8/06/2023), 'Project Name' (PRJ - 00000023), 'PM Submitted by' (redacted), 'PM Submitted Date' (8/06/2023, 12:00 pm), 'Project Build Stage' (Initiation), 'Planning Baseline Start Date' (12/06/2023), 'Planning Baseline Finish Date' (31/08/2023), 'Planning Actual Start Date', and 'Planning Actual Finish Date'. There are also sections for 'Planning Phase' and 'Design Phase'.

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

The screenshot shows a web form titled "Project Plan Details". The form is organized into several sections, each with a dropdown arrow on the left:

- Project Plan Details:** Includes fields for "Update Type", "Project Name" (PRJ - 00000023), "Project Plan Status" (a dropdown menu with "Endorsed" selected and highlighted by a red box), "Project Plan Date" (8/06/2023), "PM Submitted by" (redacted), "PM Submitted Date" (8/06/2023, 12:00 pm), and "Project Build Stage" (Initiation).
- Planning Phase:** Includes "Planning Baseline Start Date" (12/06/2023), "Planning Baseline Finish Date" (31/08/2023), "Planning Actual Start Date", and "Planning Actual Finish Date".
- Design Phase:** Includes "Design Baseline Start Date" (12/06/2023), "Design Baseline Finish Date" (28/07/2023), "Design Actual Start Date", and "Design Actual Finish Date".
- Construction Phase:** Includes "Construction Baseline Start Date" (5/06/2023), "Construction Baseline Finish Date" (29/06/2023), "Construction Actual Start Date", and "Construction Actual Finish Date".
- Close Out Phase:** Includes "Close Out Baseline Start Date" (11/06/2023), "Close Out Baseline Finish Date" (30/06/2023), "Close Out Actual Start Date", and "Close Out Actual Finish Date".
- Project Forecast Costs:** Includes "Forecast MoE OPEX Costs" (50.00) and "Forecast WIP Costs".

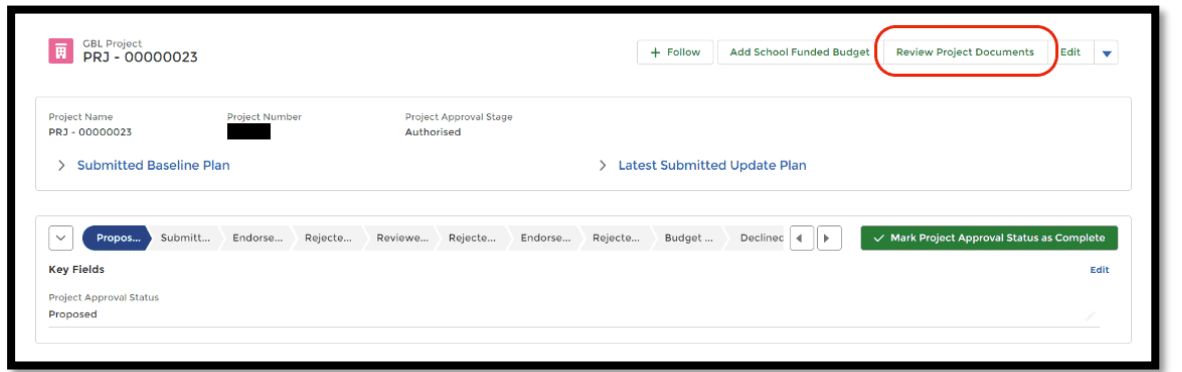
At the bottom of the form, there are two buttons: "Cancel" and "Save". The "Save" button is highlighted with a green box.

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.

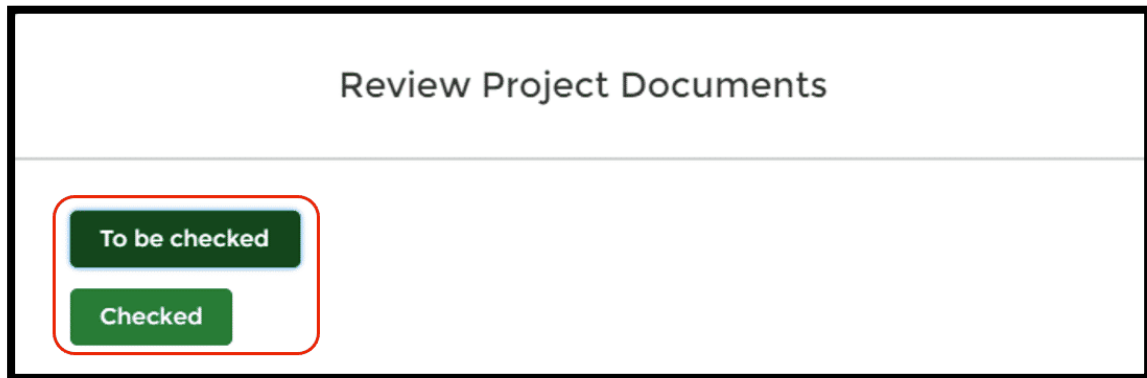
Step 1 – Review the Project Documents

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.

Review Project Documents

CHECK-00019524

Status
Status: Not checked

Document Stage:
Opening

School Led Project:
PRJ - 00012342

Document Name:
Design Certificate

School DFA Review
--None--

School DFA Endorse Notes

No preview available

1

2

3

4 **Next**

Step 5 – Complete reviewing project documents

Complete for all project documents. Click 'Done' once you have reached the end.

Review Project Documents

All To Be Checked Records have been Reviewed, Select Done to return to the Review Screen

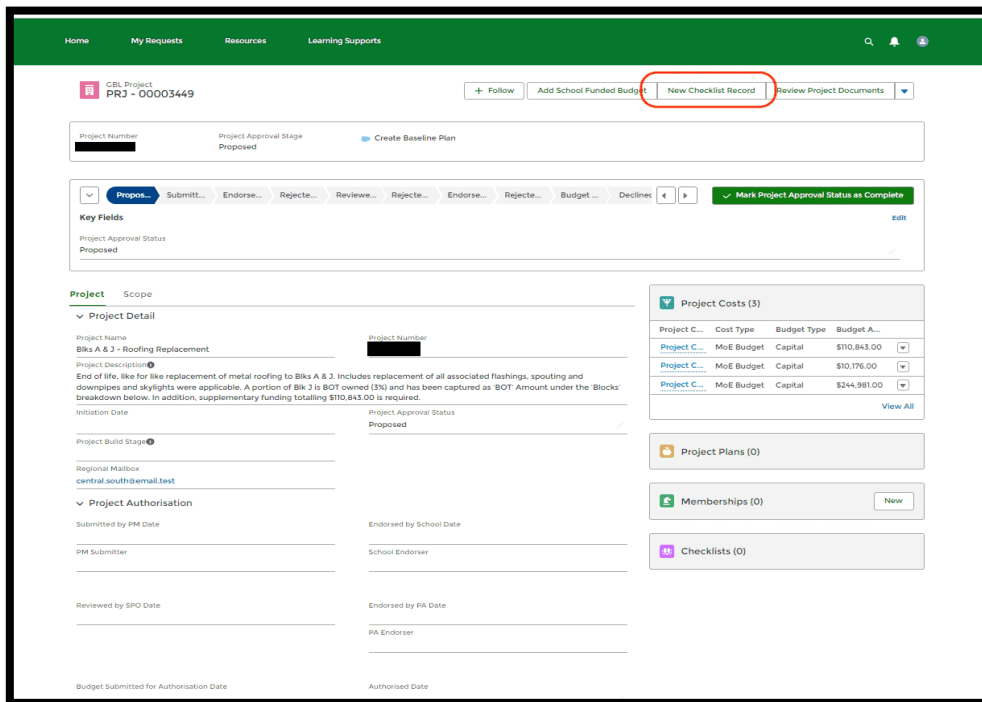
Done

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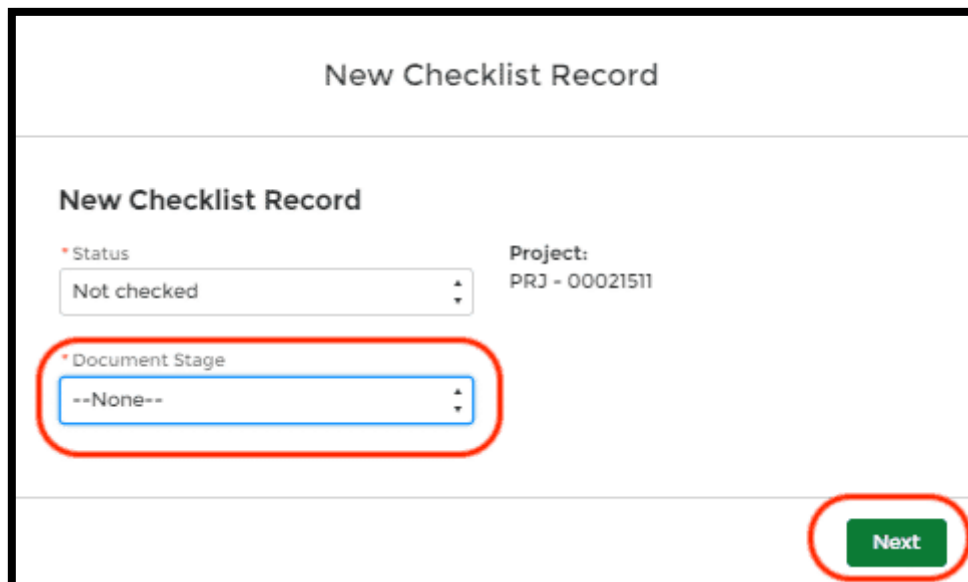
6.2.1. Attaching a Project Document

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.

New Checklist Record

New Checklist Record

* Status: Not checked

Project: PRJ - 00021511

* Document Stage: Opening

* Document Name: --None--

Next

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.

Checklists (3)

Checklist ...	Document ...	Status	Document ...
CHECK-0...	Opening	Not checked	Design Cer... <input type="button" value="v"/>
CHECK-0...	Opening	Not checked	Helios Ass... <input type="button" value="v"/>
CHECK-0...	Opening	Not checked	Building U... <input type="button" value="v"/>

[View All](#)

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.

Checklist: CHECK-00019551

+ Follow Edit New Note Clone

Project Document Detail

Status: Not checked

Document Stage: Opening

Project: PRJ - 00021511

Document Name: Building Update Form for new building, as Built Drawings is required, so that a proposed building can be created in KZ

Approval Details

School DFA Review

School DFA Endorser

School DFA Endorse Date

School DFA Endorse Notes

Property Advisor Endorse

Property Advisor Endorser

Property Advisor Endorse Date

Property Advisor Endorse Notes

Files (0)

Upload Files

Or drop files

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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.

The screenshot displays the 'Project Plan' screen for project PRJ - 00021511. The 'Memberships (1)' section is highlighted with a red circle, showing a table with one entry:

Members...	Type	Description	Main Contr...
Builders L...	Contractor	General Co...	<input checked="" type="checkbox"/>

Step 2 – More Supplier Information

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

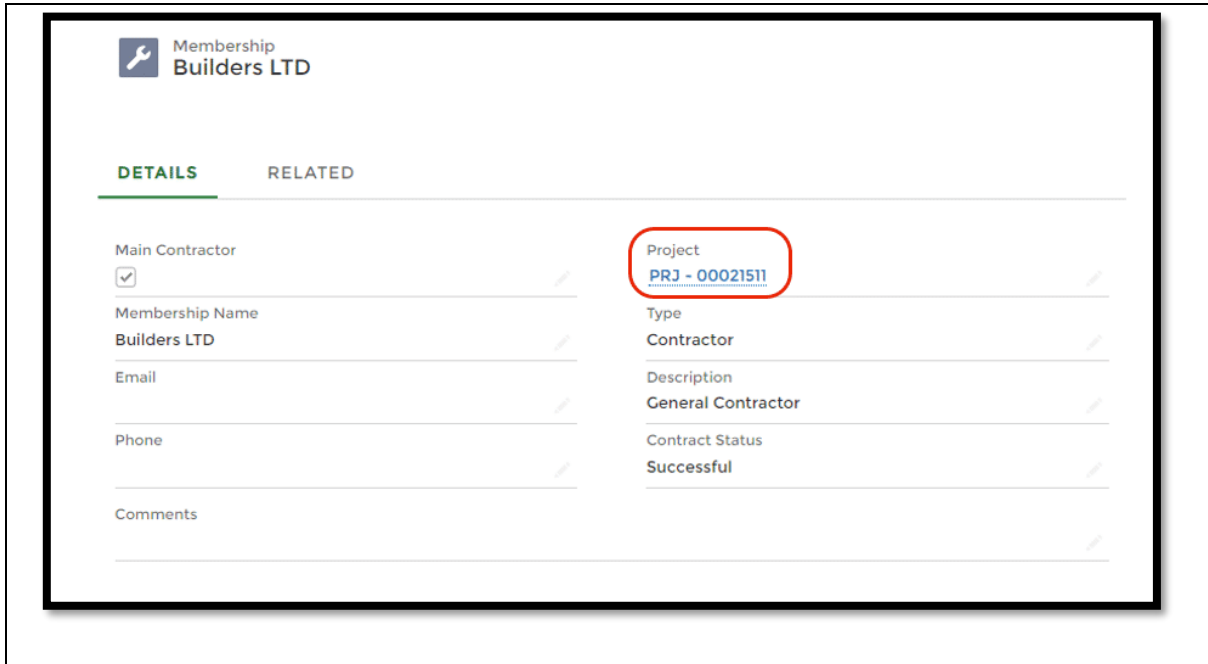
The screenshot shows the 'Memberships' page for project PRJ - 00021511. The table below shows the details for the supplier 'Builders LTD':

Membership Name	Type	Description	Main Contractor	Contract Status
Builders LTD	Contractor	General Contractor	<input checked="" type="checkbox"/>	Successful

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

GBL Project
PRJ - 00021511
+ Follow Add School Funded Budget New Checklist Record Review Project Documents

Project Number: [REDACTED] Project Approval Stage: Authorised [Create/Update Update Plan](#)

> Submitted Baseline Plan

Propose... Submitt... Endorse... Rejecte... Reviewe... Rejecte... Endorse... Rejecte... Budget... Decline
Mark Project Approval Status as Complete

Project Scope

Project Detail

Project Name: TL2,5,9,10,12,H,A,B,C,J,E YR7/STA,GYM Electrical SB & LED Lighting Replacement

Project Description: and replacement of fuses to RCD fuses. Lighting in Block A, B, C, STA, GYM require replacement with LED lighting. Switchboards in Block A, B, C STA, & GYM require upgrades

Initiation Date: 13/07/2023

Project Build Stage: [REDACTED]

Regional Mailbox: northern@email.test

Project Authorisation

Submitted by PM Date: [REDACTED] Endorsed by School Date: [REDACTED]

PM Submitter: [REDACTED] School Endorser: [REDACTED]

Reviewed by SPO Date: [REDACTED] Endorsed by PA Date: [REDACTED]

SPO Reviewer: [REDACTED] PA Endorser: [REDACTED]

Budget Submitted for Authorisation Date: [REDACTED] Authorised Date: [REDACTED]

Budget Submitter: [REDACTED]

Closed by PM Date: [REDACTED]

Closed by PM: [REDACTED]

Project Team

Project Manager Type: School Project Manager

Project Manager Name: [REDACTED] School Delegated Financial Auth Type: Bot Chair

[REDACTED] School Delegated Financial Auth Name: [REDACTED]

Project Costs (3)

Project C...	Budget Fu...	Budget Type	Budget A...
Project C...	SYA	Capital	\$124,271.43
Project C...	FIVE SPDIS...	Capital	\$58,005.77
Project C...	JNO CAPL...	Capital	\$4,922.00

[View All](#)

Project Plans (1)

Project PL...	Record Type	Project Pla...	Project Pla...
PP-00001...	School Led...	Endorsed	13/07/2023

[View All](#)

Memberships (1) [New](#)

Members...	Type	Description	Main Contr...
Builders L...	Contractor	General Co...	<input checked="" type="checkbox"/> <input type="checkbox"/>

[View All](#)

Checklists (6+)

Checklist ...	Document ...	Status	Document ...
CHECK-0...	Opening	Design Cer...	<input type="checkbox"/>
CHECK-0...	Opening	Checked	Helios Ass...
CHECK-0...	Opening	Checked	Building U...
CHECK-0...	Opening	Checked	Procureme...
CHECK-0...	Opening	Checked	Procureme...
CHECK-0...	Opening	Checked	Procureme...

[View All](#)

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.

GBL Project
PRJ - 00000023

+ Follow Add School Funded

Project Name PRJ - 00000023 Project Number [REDACTED] Project Approval Stage Proposed

> Submitted Baseline Plan

Submit... Endorse... Rejecte... Reviewe... Rejecte... Endorse... Rejecte... Budget ... Declinec

Key Fields
Project Approval Status Submitted by PM

Project Scope

Project Detail

Project Name 1. A. B. C. F. P. M. R. V. W: Roofing and Electrical Works Project Number [REDACTED]

Project Build Stage Initiation

Project Description This project addressed the priority 2 roofing and electrical works identified in the specialist reports and condition assessment.

Initiation Date Project Approval Status Submitted by PM

Project Authorisation

Submitted by PM Date 8/06/2023 Endorsed by School Date

Step 3 – ‘Mark Project Approval Status as Complete’

Click on ‘Mark Project Approval Status as Complete’

GBL Project
PRJ - 00000023

+ Follow Add School Funded Budget Review Project Documents Edit

Project Name PRJ - 00000023 Project Number [REDACTED] Project Approval Stage Proposed

> Submitted Baseline Plan

Submit... Endorse... Rejecte... Reviewe... Rejecte... Endorse... Rejecte... Budget ... Declinec Mark Project Approval Status as Complete

Key Fields
Project Approval Status Submitted by PM

Project Scope

Project Detail

Project Name 1. A. B. C. F. P. M. R. V. W: Roofing and Electrical Works Project Number [REDACTED]

Project Build Stage Initiation

Project Description This project addressed the priority 2 roofing and electrical works identified in the specialist reports and condition assessment.

Initiation Date Project Approval Status Submitted by PM

Project Authorisation

Submitted by PM Date 8/06/2023 Endorsed by School Date

Project Costs (2)

Project C...	Cost Type	Budget Type	Budget A...
Project C...	MoE Budget	Capital	\$80,000.00
Project C...	School Fun...	Third Party...	\$1,000.00

Project Plans (1)

Project Pl...	Record Type	Project Pla...	Project Pla...
PP-0000...	School Led...	Submitted	8/06/2023

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](#)