

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

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8. 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.

Fields in the form include: Title, Given name (requires EOI), Middle name (requires EOI), Preferred name, Surname (requires EOI)*, Date of birth (DD/MM/YYYY) (requires EOI)*, Gender (requires EOI)*, Email address*, Phone number, Date of EOI check (I have sighted EOI documentation in accordance with my delegated authority and the Terms of Use.)*, and Organisation*.

Step 3: Enter User Details

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

Fields in the form include: Title, Given name (requires EOI), Middle name (requires EOI), Preferred name, Surname (requires EOI)*, Date of birth (DD/MM/YYYY) (requires EOI)*, Gender (requires EOI)*, Email address*, Phone number, Date of EOI check (I have sighted EOI documentation in accordance with my delegated authority and the Terms of Use.)*, and Organisation*.

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".

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

Home **My Learning** Catalogue Skills Induction

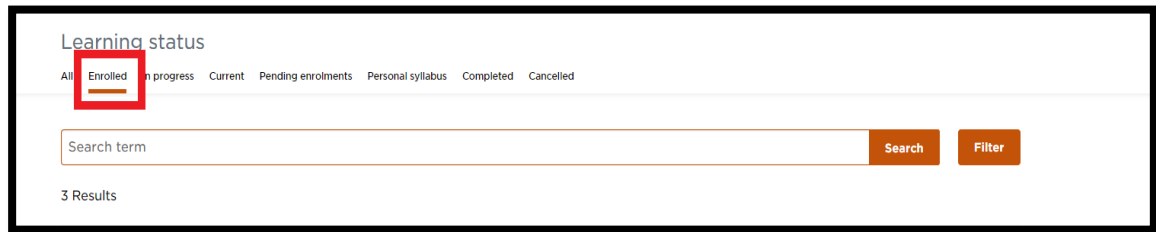
Learning status

All Enrolled In progress Current Pending enrolments Personal syllabus Completed Cancelled

Search term Search Filter

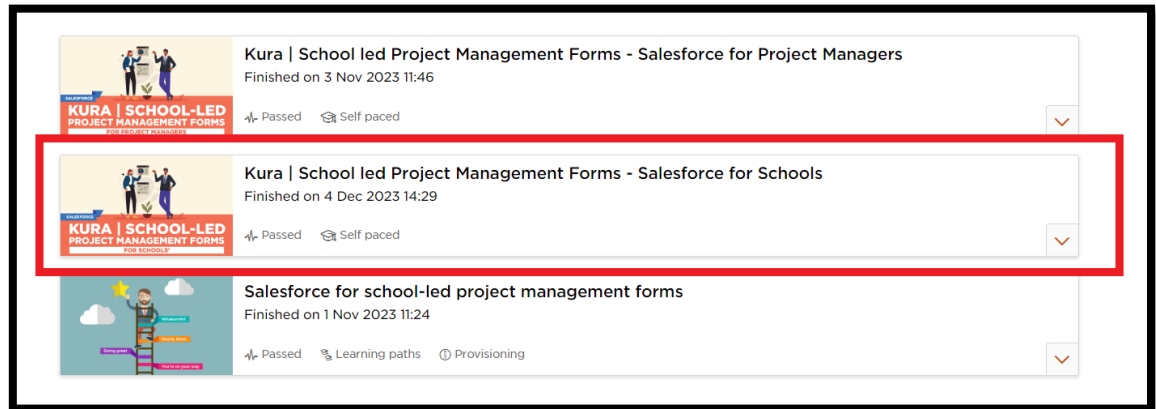
48 Results

Step 3 - Click on 'Enrolled'



The screenshot shows the 'Learning status' page. At the top, there are tabs: 'All', 'Enrolled', 'In progress', 'Current', 'Pending enrolments', 'Personal syllabus', 'Completed', and 'Cancelled'. The 'Enrolled' tab is highlighted with a red box. Below the tabs is a search bar with the placeholder text 'Search term' and two buttons: 'Search' and 'Filter'. Below the search bar, it says '3 Results'.

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



The screenshot shows a list of search results. The second result is highlighted with a red box. It is titled 'Kura | School led Project Management Forms - Salesforce for Schools' and shows it was finished on 4 Dec 2023 14:29. The first result is 'Kura | School led Project Management Forms - Salesforce for Project Managers' finished on 3 Nov 2023 11:46. The third result is 'Salesforce for school-led project management forms' finished on 1 Nov 2023 11:24. Each result includes a status icon (Passed) and a self-paced icon.

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.

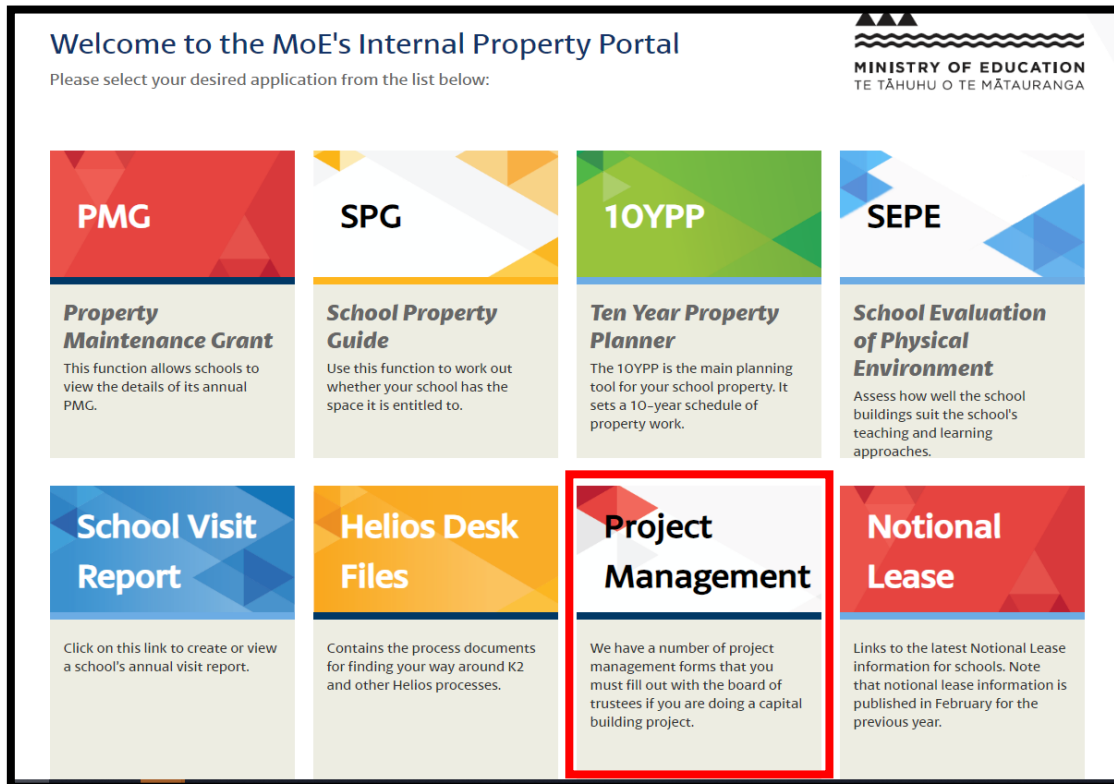
Please log into [Salesforce](#) once you have been approved by the Education Service Desk. Logging in activates your account and allows your Project Manager to submit your school's projects.

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.

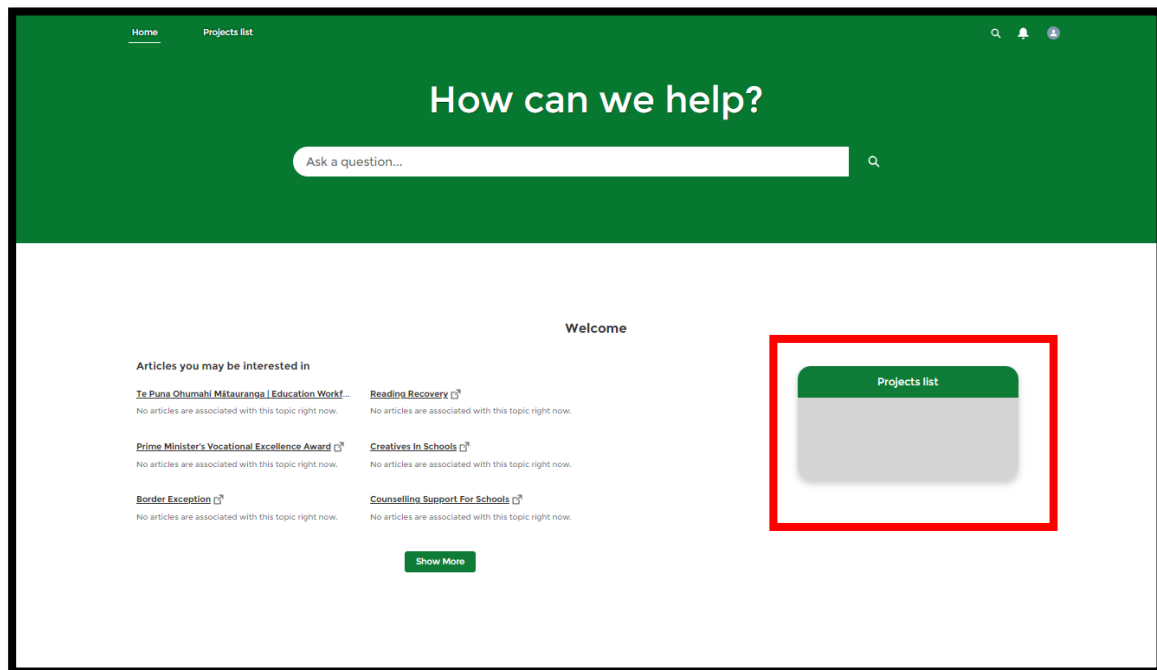
Step 2 – Login with your ESL account

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

The image shows a screenshot of the 'Education Sector Logon' form. At the top, it has the 'Education Sector Logon' header with a logo. Below this is a button that says 'View in Te Reo Māori'. The form has two input fields: 'Username' and 'Passphrase'. Below these fields are two links: 'Forgotten username' and 'Forgotten passphrase'. At the bottom of the form is a large blue button labeled 'Login'. Below the login button is a link that says '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.

School Led Projects			
ALL			
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
View All			

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.

Home **Projects list**

GBL Project
PRJ - 00021511

+ Follow Add School Funded Budget New Checklist Record Review Project Documents

Project Number: ██████ Project Approval Stage: Authorised Create/Update Update Plan

> Submitted Baseline Plan > Latest Submitted Update Plan

[>] [Proposed] [Submit] [Endorse] [Reject] [Review] [Reject] [Endorse] [Reject] [Budget] [Decline] [Mark Project Approval Status as Complete]

Project Scope

Project Detail

Project Name: 11,2,5,9,10,12,14,A,B,C,J,E YR7STA,GYM Electrical SB & LED Lighting Replacement

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

Initiation Date: 13/07/2023

Project Build Stage: Proposed

Project Approval Status: Proposed

Regional Mailbox: northern@mail.test

Project Authorisation

Submitted by PM Date: PM Submitter: School Endorser:

Reviewed by SPO Date: SPO Reviewer: PM Endorser:

Project Costs (3)

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

[View All](#)

Project Plans (3)

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

[View All](#)

Memberships (1)

Members...	Type	Description	Main Contr...
Builders L...	Contractor	General Co...	✓

[View All](#)

5. How to View Project Scope

Step 1 - Click on the 'Scope' tab.

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

Project Scope			
Project Activities (4)			
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.

The screenshot shows a web interface for 'Project Activity' with the identifier 'ACT - 00000005'. It features two tabs: 'DETAILS' (active) and 'RELATED'. The 'DETAILS' tab contains several fields: '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.), 'Scope of Work Comments' (Replace clear sheet with new trafficable sheeting. Install cap flashing over split sheet. Replace gutter.), 'Created By' (redacted), 'Created' (7/06/2023, 2:51 pm), 'Last Modified By' (redacted), and 'Last Modified' (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
- endorse the Project Plan.

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

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

6.1. Review and Endorse or Reject the Project Plan

Step 1 – Find the Project Plan

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

Project Approval Status
Submitted by PM

Project Scope

Project Detail

Project Name
T, A, B, C, F, P, M, R, V, W: Roofing and Electrical Works

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

PM Submitter

Reviewed by SPO Date

Budget Submitted for Authorisation Date

Closed by PM Date

Closed by PM

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

View All

Project Plans (1)

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

View All

Memberships (1)

Members...	Type	Description	Main Contr...
bob	Contractor	Builder/ C...	<input checked="" type="checkbox"/>

View All

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’: This 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’. This is the estimated total project cost, including both Ministry and Board contributions.

Project Plan PP-0000112 + Follow Edit Printable View

Endorsed Rejected [Mark Project Plan Status as Complete](#)

Key Fields Edit

Project Plan Status: Endorsed

Project Plan Details

Project Plan Status: Endorsed

PM Submitted by: [Redacted]

PM Submitted Date: 23/06/2023, 12:00 pm

Project Costs (3)

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...

[View All](#)

Planning Phase

Planning Baseline Start Date: 4/06/2023

Planning Baseline Finish Date: 25/06/2023

Design Phase

Design Baseline Start Date: 2/07/2023

Design Baseline Finish Date: 25/06/2023

Construction Phase

Construction Baseline Start Date: 2/07/2023

Construction Baseline Finish Date: 25/06/2023

Close Out Phase

Close Out Baseline Start Date: 6/06/2023

Close Out Baseline Finish Date: 25/06/2023

Estimated Total Costs

Recommended Tender / Construction: \$100.00

2.1 Project Management Fees: \$100.00

2.2 Design Fees: \$100.00

Consent Fees: \$100.00

2.3 Contingency: \$100.00

Please note that budget forecast is only for the Ministry budget expenditure.

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 Edit

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

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](#)

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

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
1	Project Cost 026346	Jun/2023	CAPEX	Monthly	
2	Project Cost 026347	Jul/2023	CAPEX	Monthly	\$9,000.00
3	Project Cost 026348	Aug/2023	CAPEX	Monthly	\$1,000.00
4	Project Cost 026349		OPEX	Work in Progress	
5	Project Cost 026350		CAPEX	Work in Progress	

Step 4 – Endorse or Reject Project Plan

Once you have reviewed all sections of the Project Plan, record your review outcome by changing the Project 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 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'

Endorsed

Key Fields

Project Plan Status
Endorsed

Project Plan Details

Update Type

Project Plan Status
Endorsed

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 Phase

Planning Baseline Start Date
12/06/2023

Planning Baseline Finish Date
31/08/2023

Design Phase

Planning Actual Start Date

Planning Actual Finish Date

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

Project Plan Details

Update Type

Project Plan Status
Endorsed

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 Phase

Planning Baseline Start Date
12/06/2023

Planning Actual Start Date

Planning Baseline Finish Date
31/08/2023

Planning Actual Finish Date

Design Phase

Design Baseline Start Date
12/06/2023

Design Actual Start Date

Design Baseline Finish Date
28/07/2023

Design Actual Finish Date

Construction Phase

Construction Baseline Start Date
5/06/2023

Construction Actual Start Date

Construction Baseline Finish Date
29/06/2023

Construction Actual Finish Date

Close Out Phase

Close Out Baseline Start Date
11/06/2023

Close Out Actual Start Date

Close Out Baseline Finish Date
30/06/2023

Close Out Actual Finish Date

Project Forecast Costs

Forecast MoE OPEX Costs
\$0.00

Forecast WIP Costs

Forecast MoE CAPEX Costs

Cancel 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.

GBL Project
PRJ - 00000023

+ Follow Add School Funded Budget Review Project Documents Edit

Project Name
PRJ - 00000023

Project Number
[Redacted]

Project Approval Stage
Authorised

> Submitted Baseline Plan > Latest Submitted Update Plan

Propose Submit Endorse Reject Review Reject Endorse Reject Budget Decline

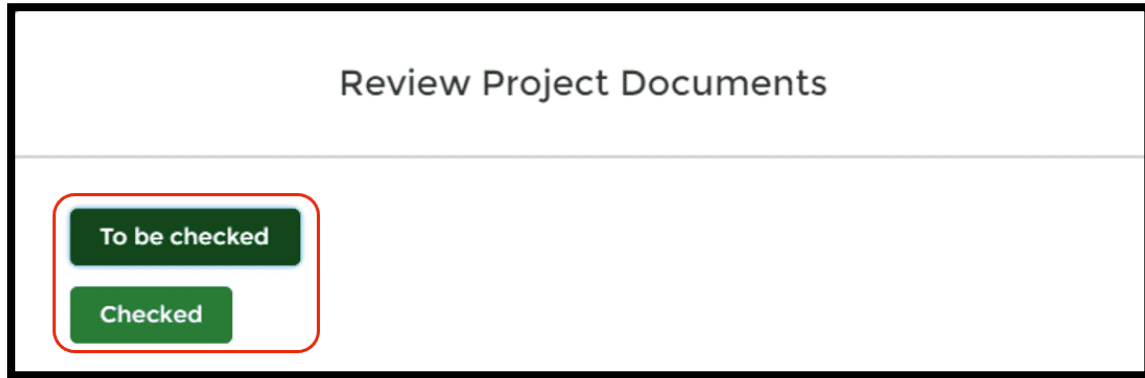
Mark Project Approval Status as Complete

Key Fields

Project Approval Status
Proposed

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'

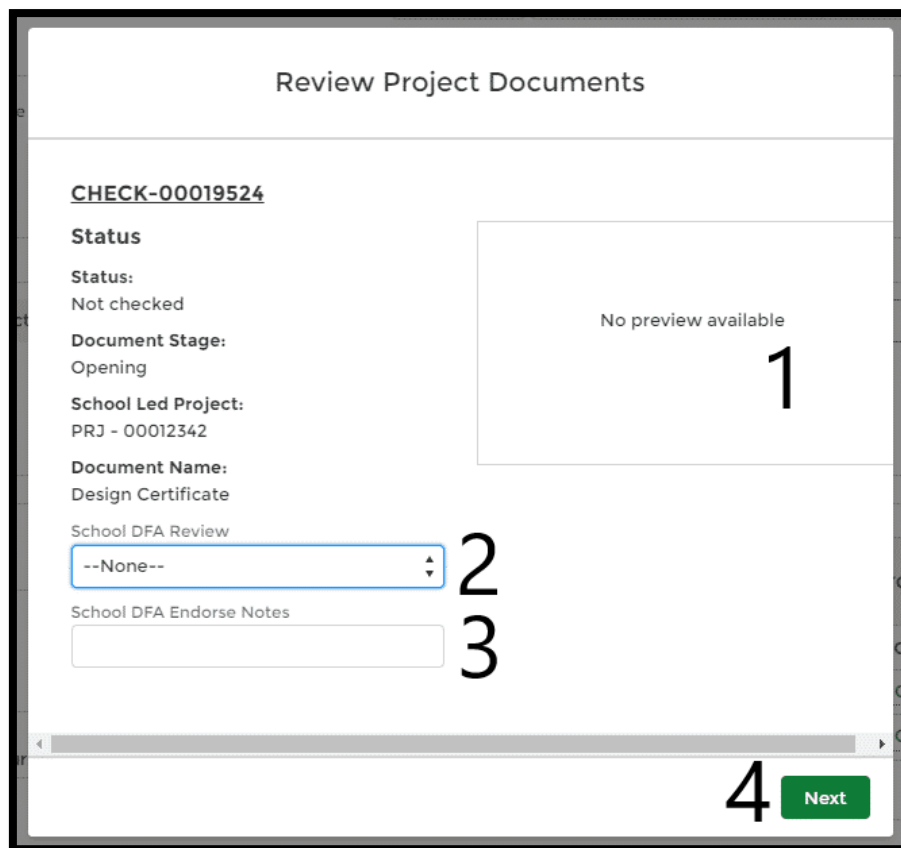


The screenshot shows the top section of the 'Review Project Documents' interface. It features a title 'Review Project Documents' and two green buttons: 'To be checked' and 'Checked'. A red rectangular box highlights both buttons.

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.



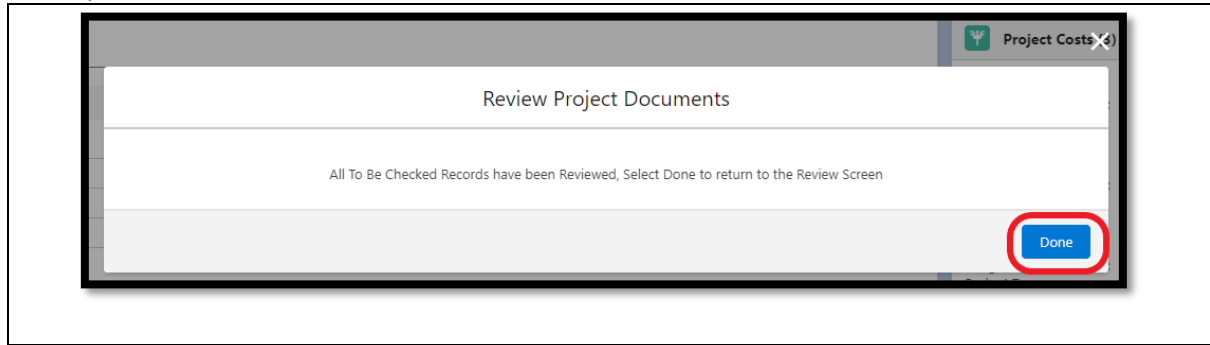
The screenshot displays the 'Review Project Documents' details screen. It includes the following elements with numbered callouts:

- 1:** A preview area on the right side of the screen displaying 'No preview available'.
- 2:** A dropdown menu labeled 'School DFA Review' with '--None--' selected.
- 3:** A text input field labeled 'School DFA Endorse Notes'.
- 4:** A green 'Next' button at the bottom right of the screen.

Other visible text on the screen includes: 'CHECK-00019524', 'Status: Not checked', 'Document Stage: Opening', 'School Led Project: PRJ - 00012342', and 'Document Name: Design Certificate'.

Step 5 – Complete reviewing project documents

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



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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.

The screenshot shows the Salesforce interface for a project record. At the top, there is a green navigation bar with tabs: Home, My Requests, Resources, and Learning Supports. Below this, the project details for 'PRJ - 00003449' are displayed. The 'New Checklist Record' button is highlighted with a red circle in the top navigation bar. The main content area shows the project details, including the project name 'Blks A & J - Roofing Replacement', the project description, and the project approval status 'Proposed'. The 'Key Fields' section shows the project approval status and the project build stage. The 'Project Costs' table shows three rows of data. The 'Project Plans' section shows zero plans. The 'Memberships' section shows zero memberships. The 'Checklists' section shows zero checklists.

Choose the document stage from the drop-down. For opening a project, this should be 'Opening'.

The screenshot shows the 'New Checklist Record' form. The 'Status' field is set to 'Not checked'. The 'Project' field is set to 'PRJ - 00021511'. The 'Document Stage' drop-down menu is highlighted with a red circle, and the 'Next' button is also highlighted with a red circle.

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

* Document Stage: Opening

Project: PRJ - 00021511

* 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...
CHECK-0...	Opening	Not checked	Helios Ass...
CHECK-0...	Opening	Not checked	Building U...

[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

Document Name: Building Update Form for new building, as Built Drawings is required, so that a proposed building can be created in K2

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

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.

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 > Latest Submitted Update Plan

Propos... Submit... Endorse... Reject... Review... Reject... Endorse... Reject... Budget... Decline... Mark Project Approval Status as Complete

Project Scope

Project Detail

Project Name: T1.2.5.9.10.12.14.A.B.C.3.E.YR7STA.GYM Electrical SB & LED Lighting Replacement

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

Initiation Date: 13/07/2023

Project Approval Status: Proposed

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]

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, CAPI...	Capital	\$4,922.00

View All

Project Plans (3)

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

View All

Memberships (1)

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

View All

Step 2 – More Supplier Information

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

Projects > PRJ - 00021511

Memberships

1 item • Updated a few seconds ago

	Membership Name	Type	Description	Main Contractor	Contract Status
1	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.

Membership Builders LTD

DETAILS RELATED

Main Contractor ☒

Membership Name Builders LTD

Email

Phone

Comments

Project [PRJ - 00021511](#)

Type Contractor

Description General Contractor

Contract Status Successful

January 2024 v1

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... Submit... Endorse... Reject... Review... Reject... Endorse... Reject... Budget ... Decline

Mark Project Approval Status as Complete

Project

Scope

Project Detail

Project Name
11,2,5,9,10,12,14-A,B,C,J,E YR7/STA,CYM Electrical SB & LED Lighting Replacement

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

Initiation Date
13/07/2023

Project Build Stage

Regional Mailbox
northern@email.test

Project Authorisation

Submitted by PM Date

PM Submitter

Reviewed by SPO Date

SPO Reviewer

Budget Submitted for Authorisation Date

Budget Submitter

Closed by PM Date

Closed by PM

Project Team

Project Manager type
School Project Manager

Project Manager Name

Project Number
[REDACTED]

Project Approval Status
Proposed

Endorsed by School Date

School Endorser

Endorsed by PA Date

PA Endorser

Authorised Date

School Delegated Financial Auth Type
BoT Chair

School Delegated Financial Auth Name

Project Costs (3)

Project C...	Budget Pu...	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...	

View All

Checklists (6+)

Checklist ...	Document ...	Status	Document ...
CHECK-0...	Opening		Design Cer...
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... Reject... Review... Reject... Endorse... Reject... Budget ... Decline

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... Reject... Review... Reject... Endorse... Reject... Budget ... Decline 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

[View All](#)

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](#)