

Role: Supplier Admin **Task:** Completing a PPM or Compliance Inspection Job

A. Accessing pre-planned Jobs B. Assigning operatives C. Adding PPM Findings D. Updating Compliance schedule E. Payment Request

| A. Accessing pre-planned Jobs | |
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| <p>A1 Pre-planned Jobs are scheduled 30 days in advance of when they are due. At this time, email notifications are generated.</p> <p>Navigate to <i>Task Management > Job Manager > Job List</i>.</p> <p>By default, only Jobs having reached their Due date will be listed.</p> <p>A2 To see scheduled Jobs, click to open Filters, then select 'All jobs'.</p> <p>Other filter settings, including dates, can also be changed here and views can be saved as 'Scenes' for future use.</p> <p>A3 Click again to close the Filter settings.</p> <p>PPM Jobs are indicated by the icon , a khaki strip on their left edge and an SFG code. (If you cannot find the Job you are looking for, the Job ref can be searched for (top-right). When there are further jobs scheduled, these can be seen by clicking 2 more .</p> | |
| <p>A4 In <i>Job List</i>, click on a Job to open its <i>Job Panel</i>.</p> <p>A5 Contact the relevant building manager, outside of Invida, to arrange visit times.</p> <p><i>Building manager contact details can be obtained via the helpdesk: efhelpdesk@admin.cam.ac.uk.</i></p> <p><i>Building addresses and postcodes can be found in the Portfolio section of Invida.</i></p> | <p>Focus: Link to <i>Team Diary</i> (see B1 below).</p> <p>Edit: Job interactions (see C1 below).</p> <p>SLA</p> <p>Add Beacon to flag a message for the helpdesk, inc. requesting an SLA break.</p> <p>Job Card: Simplified view of details for printing or saving as pdf.</p> <p>View: Screen-friendly view of details, inc. timeline of actions taken.</p> <p>Job Status: <i>Scheduled</i> <i>Open</i> <i>Complete</i> or <i>Closed</i></p> |

B. Assigning operatives to Jobs

- B1** In the *Job Panel*, click **Focus** to open *Team Diary*.
- B2** To assign to the arranged day, click the cell next to the required operative's name and below the required date.
- Use **< Today >** to navigate between days.
- To assign to an arranged time on a particular day, click *Day* to display time slots.
- Click **Save changes 1** to finish.
- This will send a notification to the operative's mobile app. See guide: [Mobile App – PPM Jobs](#).*
- B3** Click to see all existing assignments for an operative.
- If an operative cannot be found in the list, check there are enough rows displayed by changing the 'rows per page' setting (top-right).
If they do not yet have an account, they can be added via the Service Provider section in the navigation bar.*

The screenshot displays the 'Team Diary' interface. At the top, there's a navigation bar with 'Job Manager' and 'Team Diary'. Below that, a search bar and a '25 rows per page' dropdown are visible. The main area is a calendar for June 2025, showing days from Monday 9th to Sunday 15th. On the left, there's a list of jobs with details like 'JOB3922: L870 Emergency Lighting System CSS14' and 'JOB3928: E032 Fire Extinguisher - Powder'. On the right, there's a list of operatives including 'Aaran Parkinson', 'Adam Quantill', 'Adriana Browne', and 'Archie Andrews'. A blue arrow points from the 'Day' tab in the top right to the calendar grid.

C. Adding PPM findings (If Compliance Inspection and not PPM, go to section D)

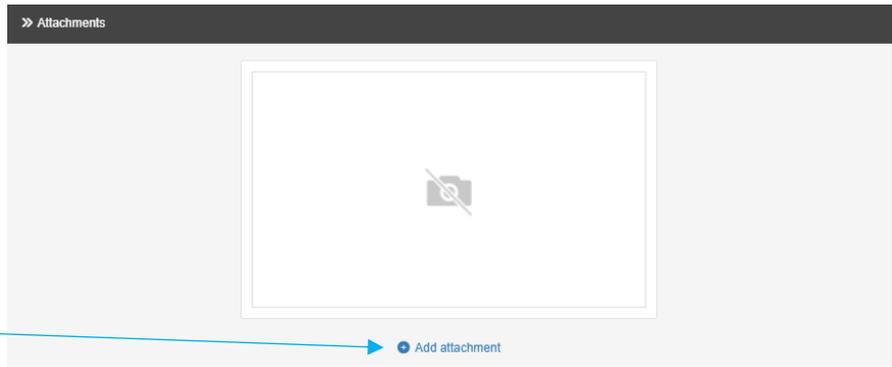
When all operatives assigned to a Job have completed their assignment, the Job status will change to Complete. If necessary, this can be done on their behalf via the Assignments section of the Job Edit window.

C1 Click *Edit* in *Job Panel* to open the Edit window.

C2 Open the *Attachments* section.

C3 Upload a service sheet or job report.

Notes can also be added to the Job by opening the Notes section. Notes submitted via the operative's mobile app also appear here.

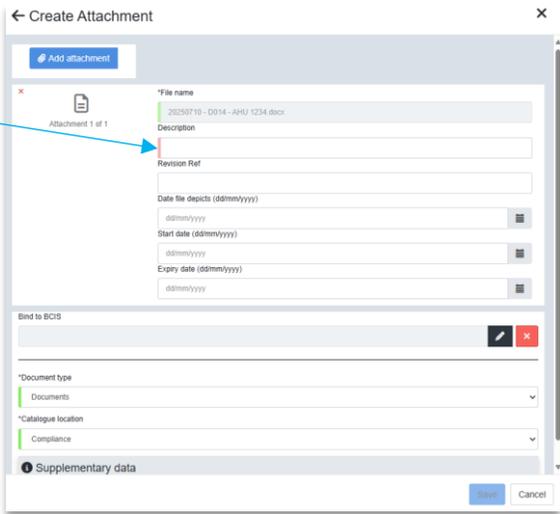


C4 Add a short description for the uploaded file.

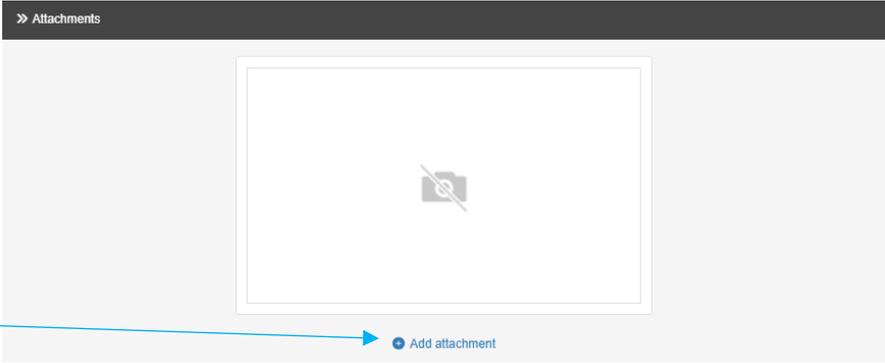
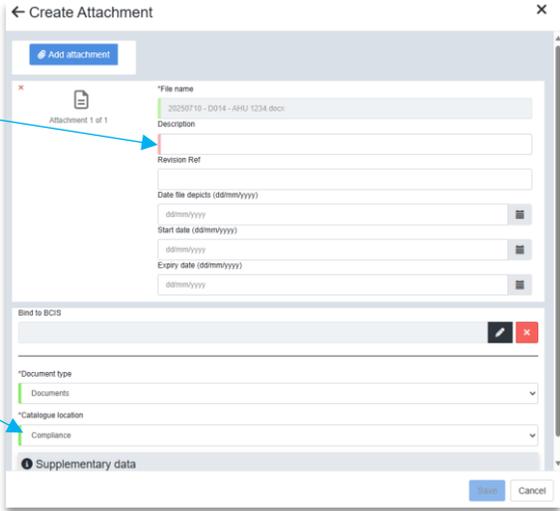
C5 Leave *Document type* as *Documents*.

C6 Leave *Catalogue location* as *Other*.

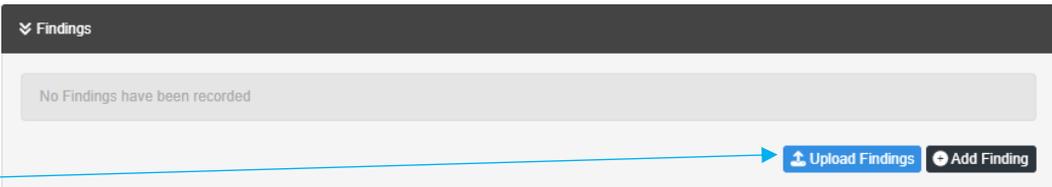
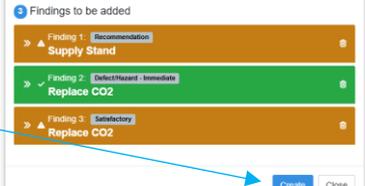
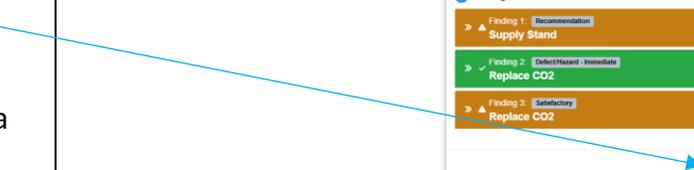
C7 Click *Save* to close window and return to compliance record.



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| <p>C8</p> | <p>Download and complete the relevant <i>Remedial Action Template</i> from: www.em.admin.cam.ac.uk/what-we-do/estate-operations/estate-maintenance/remedial-action-templates</p> |  |
| <p>C9</p> | <p>If any Findings are likely to result in assets or systems being <i>non-compliant</i>, go to section D to continue.</p> | |
| <p>C10</p> | <p>Click <i>Upload Findings</i>.</p> |  |
| <p>C11</p> | <p>In the Upload window, click <i>Upload Findings</i> and browse to the completed template.</p> |  |
| <p>C12</p> | <p>Review the <i>Findings to be added</i>.</p> |  |
| <p>C13</p> | <p>Click <i>Create</i> to add the <i>Findings</i> to the Job.</p> |  |

| D. Updating Compliance Schedule | |
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| <p><i>When all operatives assigned to a Job have completed their assignment, the Job status will change to Complete. If necessary, this can be done on their behalf via the Assignments section of the Job Edit window.</i></p> <p>D1 Click <i>Edit</i> in <i>Job Panel</i> to open the Edit window.</p> <p>D2 Open the <i>Attachments</i> section.</p> <p>D3 Upload an inspection report or certificate as a PDF file (Not PDF image of document, or Word doc).</p> <p><i>Notes can also be added to the Job by opening the Notes section. Notes submitted via the operative's mobile app also appear here.</i></p> |  |
| <p>D4 Add a short description for the uploaded file.</p> <p>D5 Leave <i>Document type</i> as Documents.</p> <p>D6 Click <i>Catalogue location</i> and select the most appropriate item beginning <i>Compliance ></i>.</p> <p>D7 Click <i>Save</i> to close window and return to compliance record.</p> |  |

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| <p>D8</p> | <p>Access the associated compliance schedule, either via an email notification, <i>My Tasks</i>, or the Schedules tab in <i>Compliance > Overview</i>.</p> | |
| <p>D9</p> <p>D10</p> <p>D11</p> <p>D12</p> | <p>If necessary, click Compliant and Change to Non-compliant</p> <p>After giving a reason for the change, the schedule status will change to: Non-compliant</p> <p>Set the date of the inspection and click to save.</p> <p>Tick the previously completed Job, to automatically pull through the inspection report uploaded to it.</p> | |

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| <p>D13</p> | <p>Download and complete the relevant <i>Remedial Action Template</i> from: www.em.admin.cam.ac.uk/what-we-do/estate-operations/estate-maintenance/remedial-action-templates</p> |  |
| <p>D14</p> | <p>Click <i>Upload Findings</i>.</p> |  |
| <p>D15</p> | <p>In the Upload window, click <i>Upload Findings</i>.</p> |  |
| <p>D16</p> | <p>Review the <i>Findings to be added</i>.</p> |  |
| <p>D17</p> | <p>Click <i>Create</i> to add the <i>Findings</i> to the Schedule.</p> |  |
| <p>D18</p> | <p>Click  to finish and send a notification to the relevant Estates team.</p> |  |

| E. Submitting a Payment Request | |
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| <p>E1 A Payment Request and invoice can now be submitted from the Job Edit window.</p> <p>See guide: Submit Payment Request.</p> |  |