

**Role:** Service Provider Administrators

**Task A:** [Navigating Invida](#)

[A: Video guide](#)

**Task B:** [Updating Service Provider details, inc. uploading documentation](#)

[B: Video guide](#)

**Task C:** [Accepting a Job & assigning Operatives](#)

[C: Video guide](#)

**Task D:** [Operatives' Invida Mobile app](#)

**Task E:** [Requesting an NTE Uplift](#)

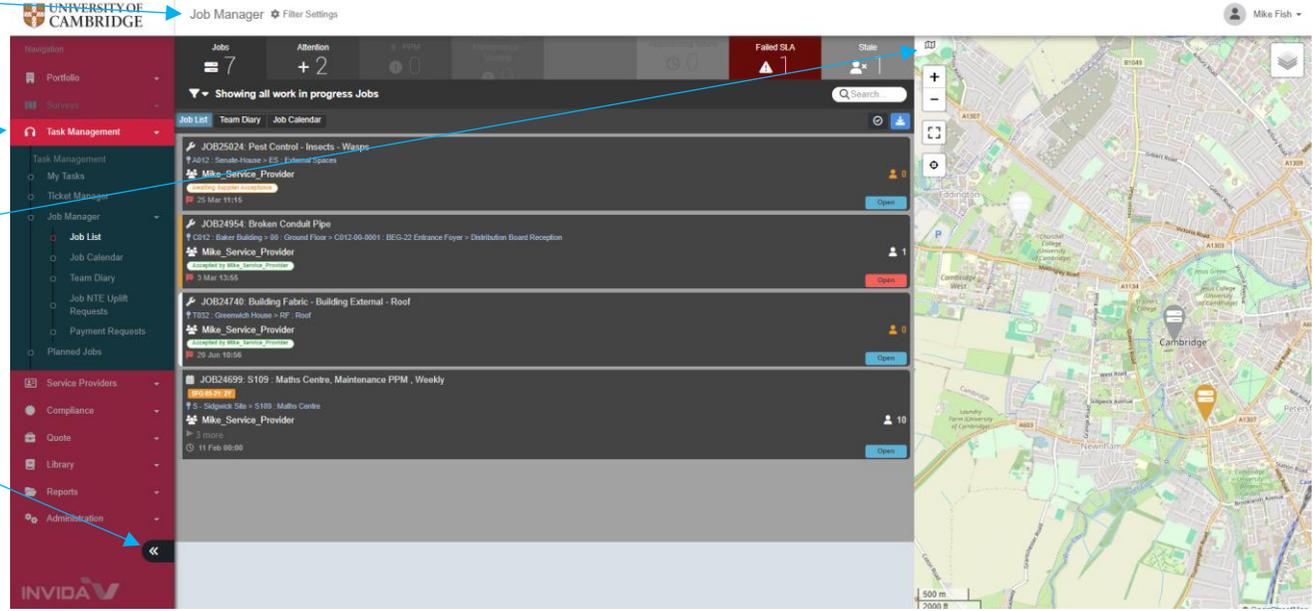
[E: Video guide](#)

**Task F:** [Responding to a Request for Quote \(RFQ\)](#)

[F: Video guide](#)

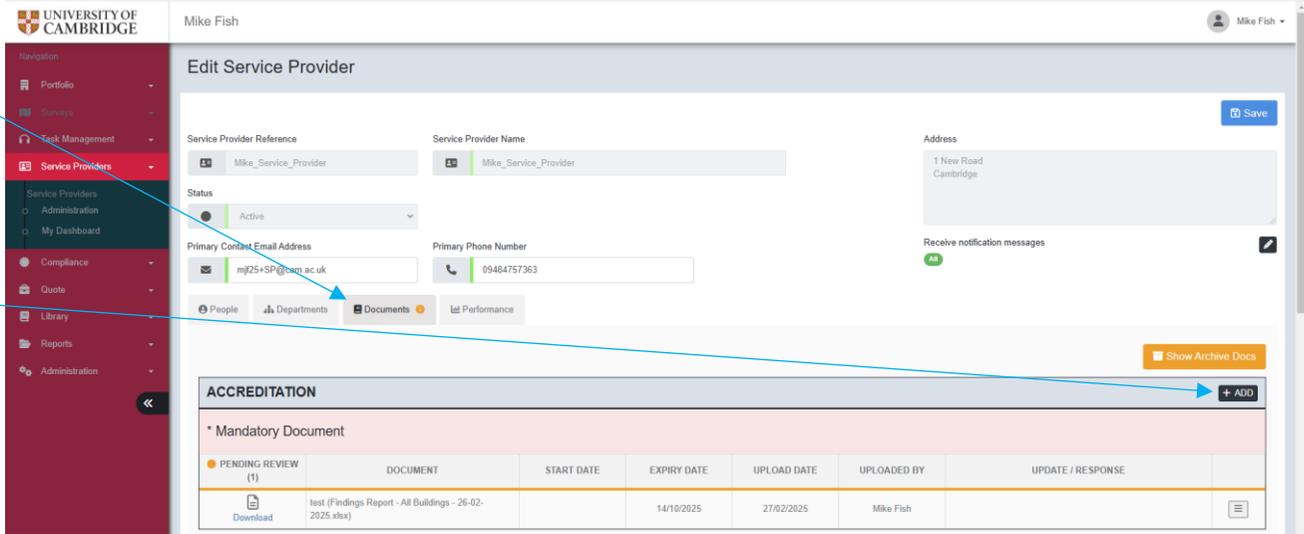
**Task G:** [Submitting a Payment Request](#)

[G: Video guide](#)

Task A: Navigating Invida	
<p><b>A1</b> Breadcrumb trail aids navigation.</p> <p><b>A2</b> Expand sections, such as <i>Task Management</i>, by clicking headings.</p> <p><b>A3</b> Show / hide map.</p> <p><b>A4</b> Expand and contract the navigation menu using the double arrow.</p> <p><b>A5</b> Open <i>Administration &gt; My Profile</i>, to set a startup page, change password and change notification settings.</p>	

**Task B: Updating Service Provider details, inc. uploading documentation**

<p><b>B1</b> Navigate to <i>Service Providers</i> &gt; <i>Administration</i>.</p>	
<p><b>B2</b> Ensure <i>Primary Contact Email Address</i> is appropriate to receive automated email notifications (click pencil to see these).</p>	
<p><b>B3</b> Notifications can be sent to additional email addresses by adding contact details on the <i>Departments</i> tab.</p>	
<p><b>B4</b> Edit <i>User</i> details, send password reset email or deactivate <i>User</i>.</p>	
<p><b>B5</b> Create new user.</p>	

<p><b>B6</b></p>	<p>To add Documentation, Click <i>Documents</i> tab.</p> <p><i>Document requirements can be obtained from <a href="mailto:edcontracts@admin.cam.ac.uk">edcontracts@admin.cam.ac.uk</a> or <a href="mailto:cw@admin.cam.ac.uk">cw@admin.cam.ac.uk</a>.</i></p>	
<p><b>B7</b></p>	<p>Click <b>+ADD</b> and complete required details.</p>	
<p><b>B8</b></p>	<p>Click <b>Save</b> regularly (after every few uploads).</p> <p><i>Documents are reviewed and validated by a contract manager, who will report back any issues or further requirements.</i></p>	

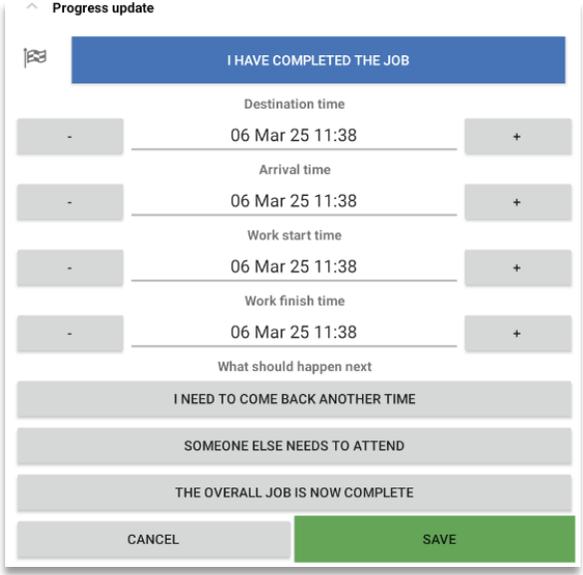
### Task C: Accepting a Job & assigning Operatives

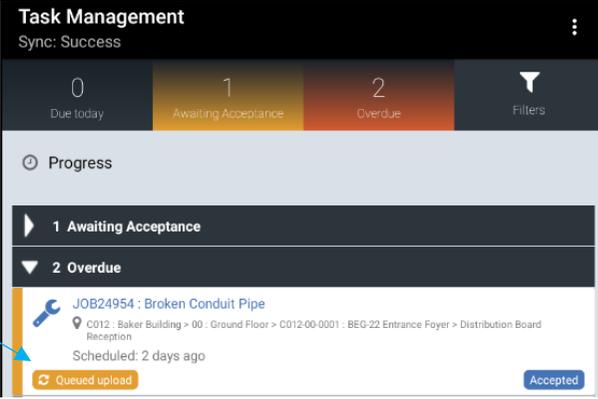
<p><b>C1</b> Follow the link in the email notification, or navigate to <i>Task Management &gt; Job Manager &gt; Job List</i>.</p> <p><b>C2</b> Click <b>Accept</b> and confirm. <i>If you need to Reject the Job, an explanatory comment can be added.</i></p> <p><b>C3</b> To assign an operative, click <i>Focus</i> to open <i>Team Diary</i>.</p>	<p>The screenshot shows the 'Job Manager' interface. A list of jobs is displayed on the left, with 'JOB25024: Pest Control - Insects - Wasps' selected. A modal window for this job is open, showing details like location (Senate-House &gt; ES: External Spaces) and due dates. The 'Accept' button is highlighted with a blue arrow. Other buttons like 'Focus', 'Edit', 'View', 'Job Card', and 'Ticket' are also visible.</p>
<p><b>C4</b> Click a day or time next to the operative's name ... or, to assign without giving a day or time, ...</p> <p>Drag from the blue-highlighted job to the box next to an operative's name. <i>The box will turn orange.</i></p> <p><b>C5</b> Click <b>Save changes</b>. <i>This will send a notification to the operative's Invida Mobile App.</i></p>	<p>The screenshot shows the 'Team Diary' interface. A calendar grid for the week of March 10th to 15th is visible. A list of jobs is shown on the left, with 'JOB25024: Pest Control - Insects - Wasps' highlighted in blue. A blue arrow points from this job to a box next to the name 'Bob Castle' in the calendar. Another blue arrow points to the 'Save changes' button at the top right of the interface.</p>

**Task D: Operatives' Invida Mobile app**

<p><b>D1</b></p> <p>Download the free Invida Mobile app from the device's Apple or Android Store.</p> <p><b>D2</b></p> <p>See B5 above to set up an operative user account.</p> <p><b>D3</b></p> <p>Open the app and use the Customer Code: UOC.</p> <p><i>See Task G for how to complete a Job via a browser, if not possible by app.</i></p>	
<p><b>D4</b></p> <p>The app organises Jobs into sections. This view can be altered using the <i>Filters</i> tile, to organise by:</p> <ul style="list-style-type: none"> <li>- Progress</li> <li>- Due date</li> <li>- Location</li> <li>- Job type</li> </ul>	

<p><b>D5</b></p> <p><b>D6</b></p> <p><b>D7</b></p> <p><b>D8</b></p>	<p>Tap on a Job to open it.</p> <p>The Job (&amp; Ticket) info can be reviewed, including the name and contact details of the Requester.</p> <p>Tap to accept the assignment.</p> <p>Tap to agree to the PoWRA questions.</p>	
<p><b>D8</b></p> <p><b>D9</b></p> <p><b>D10</b></p>	<p>The <i>Job Report</i> section can be used at any point to add photos or notes, or to see existing notes.</p> <p>Click on the asset (if present) to report its condition and add notes.</p> <p>If relevant, <i>Scan Barcode /QR Code</i> can be used.</p>	

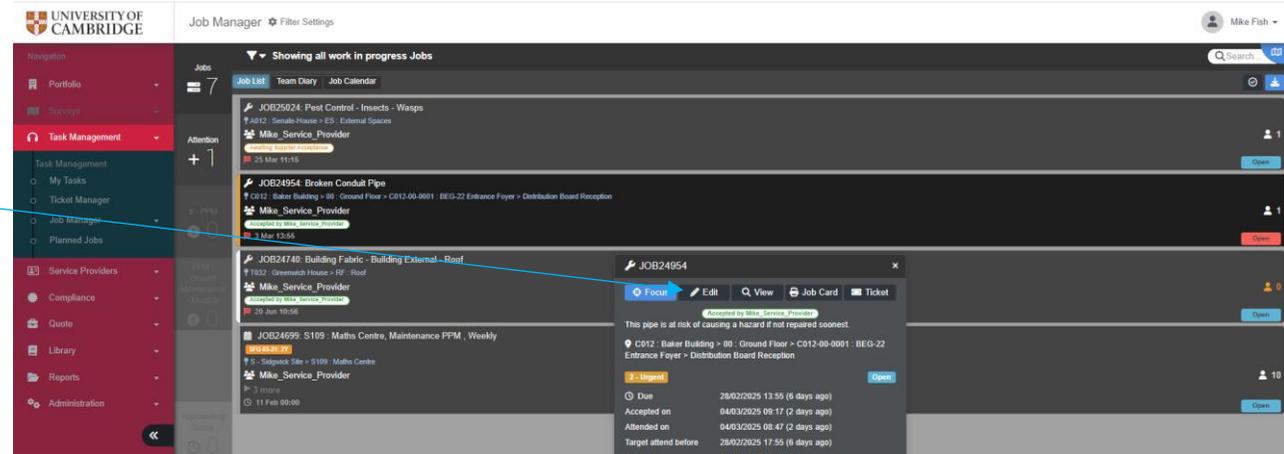
<p><b>D11</b></p> <p><b>D12</b></p>	<p>Tap, following completion of PoWRA, so that attendance on site is known.</p> <p>Tap, when assignment is complete.</p> <p><i>The following screen will open.</i></p>	
<p><b>D13</b></p> <p><b>D14</b></p> <p><b>D15</b></p>	<p>Any previous timings can be changed.</p> <p>Select one of the three options, depending on whether a further visit is required.</p> <p>Add a concluding comment and tap Save.</p>	

<b>D16</b>	<p>If, back on the homescreen, the Job is not badged with green <i>Synchronised</i>, tap the dots (top-right - Android) or lines (top-left - iPhone) and then <i>Sync</i>.</p> <p><i>When all assignments on a Job are Complete, the Job will also be marked as Complete.</i></p>	
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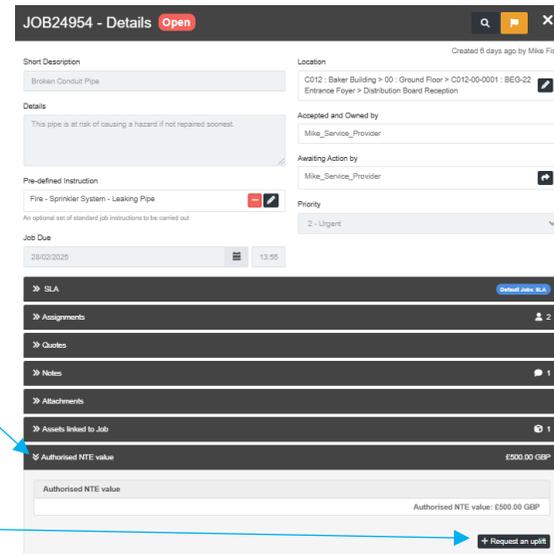
## Task E: Requesting an NTE Uplift

**E1** Click on the Job to open its panel, then on *Edit*.

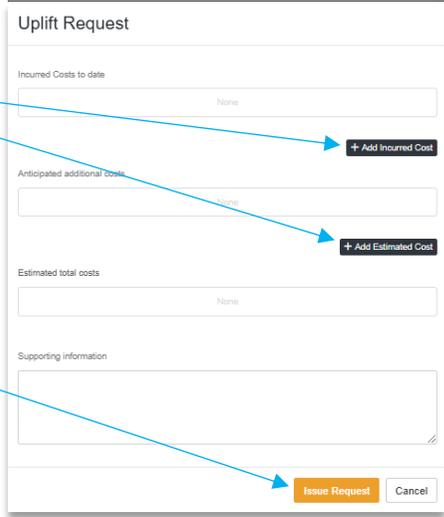
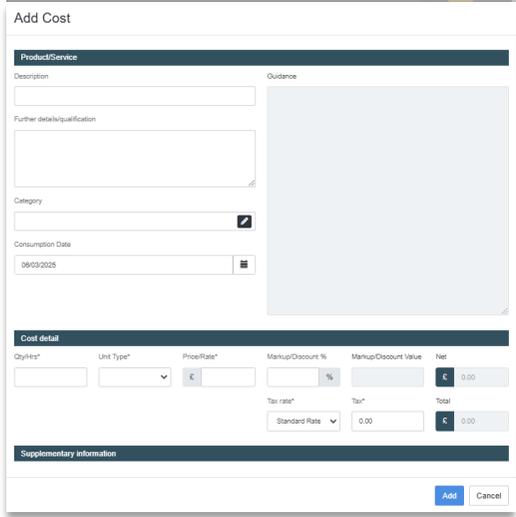
Reactive Jobs, created from a Service Ticket, have a default Not To Exceed value of £500. This value can be increased by requesting an NTE Uplift.



**E2** Open the Authorised NTE value section.



**E3** Click *Request an uplift*.

<p><b>E4</b> Click the <i>Add Cost</i> buttons to include the full NTE value required (including costs within the default £500).</p> <p><b>E5</b> When total costs are added and any <i>Supporting information</i> has been included, click <i>Issue Request</i>.</p> <p><b>E6</b> If the request is urgent, please contact <a href="mailto:efhelpdesk@admin.cam.ac.uk">efhelpdesk@admin.cam.ac.uk</a> to ensure it is approved quickly.</p> <p><i>Once approved, a notification will indicate the increased NTE value. All NTE Uplift Requests can be seen by navigating to Task Management &gt; Job Manager &gt; Job NTE Uplift Requests.</i></p>		 
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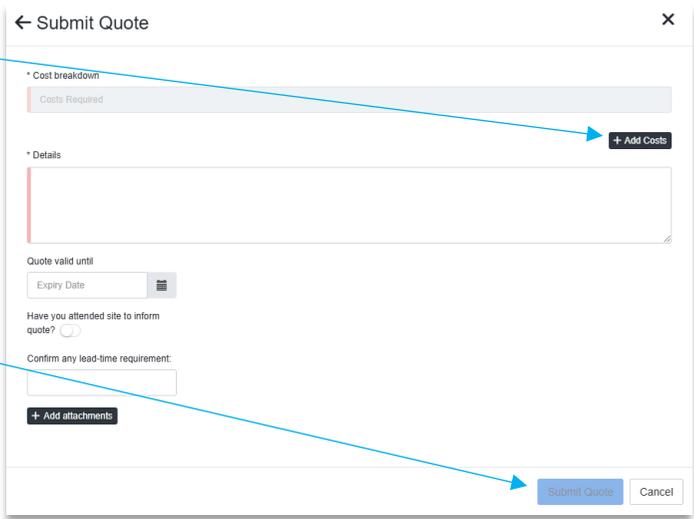
## Task F: Responding to a Request for Quote (RFQ)

- F1** The Invida quote process can only be initiated by a Service Provider from an existing Job. To do so, open the Job *Edit* window and click to open the *Quote* section.
- F2** When a *Request for Quote (RFQ)* is issued, an automated email will be received.
- F3** Open an RFQ from a link in a notification, or by navigating to *Quote > Quote Manager*.
- F4** Review the information and click *Submit Quote* (or *Decline*).  
  
*Decline is followed by the opportunity to add a comment.*

The screenshot shows the 'Quote Manager' interface. On the left is a navigation menu with options like Portfolio, Services, Task Management, Service Providers, Compliance, Quote, and Quote Manager. The main area displays a table of RFQs with columns for Reference, Short Description, Locations, Requested By, RFQ Issued Date, Quote Required By, and Status.

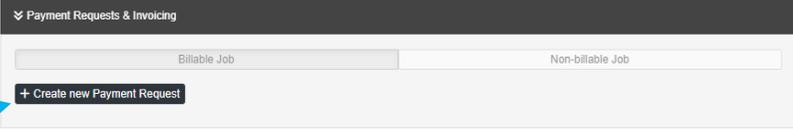
Reference	Short Description	Locations	Requested By	RFQ Issued Date	Quote Required By	Status
<b>RFQ Open</b>						
RFQ535	Install new PRVs on all 5 chillers	E - Old Addenbrookes > E041: Wellcome/CRIUK Gordon Institute	Caroline George	30/01/2025 13:16	31/03/2025 00:00	Open
RFQ697	Toilet refurb	F036 : Park Farm - Barn > 00 : Ground Floor	Mike Fish	14/02/2025 11:13	21/02/2025 00:00	Open
<b>RFQ Complete</b>						
RFQ704	Retiling of slate roof	D - Downing Site > D022: Geography School	Mike Fish (Surveyor)	25/02/2025 08:51	31/03/2025 00:00	Accepted
RFQ706	New epoxy resin floor	W129 : Data Centre > 00 : Ground Floor + 1 more	Alan Gleaves	27/02/2025 13:15	03/03/2025 00:00	Accepted

The screenshot shows the 'Request For Quote (RFQ)' details page for RFQ697. It includes a navigation menu on the left, a 'Details' section with fields for Nature of quote, Classification, Description of Product / Services to be provided, and Details. There are also sections for 'Quote required by', 'Deadline for questions', 'Planned commencement for services / works', and 'Planned completion date for services / works'. A 'Timeline' section on the right shows events like 'RFQ Status Changed' and 'REQUEST CREATED'. At the bottom, there are sections for 'People' (Requested By: Mike Fish) and 'Locations' (F : North West Sector, F036 : Park Farm - Barn, 00 : Ground Floor). Buttons for 'Submit Quote' and 'Decline' are visible at the top right.

<p><b>F5</b></p> <p><b>F6</b></p> <p><b>F7</b></p>	<p>Click <i>Add Costs</i> to give a breakdown.</p> <p>Complete other details, and add attachments, if required.</p> <p>Click <i>Submit Quote</i>.</p> <p><i>This will be reviewed by a contract manager and, if approved, will result in a Job being created and issued, with the quoted NTE value.</i></p>	 <p>The screenshot shows a 'Submit Quote' form with the following elements:</p> <ul style="list-style-type: none"><li><b>Cost breakdown:</b> A section with a 'Costs Required' field and an '+ Add Costs' button.</li><li><b>* Details:</b> A large text area for providing details.</li><li><b>Quote valid until:</b> A date picker field labeled 'Expiry Date'.</li><li><b>Have you attended site to inform quote?:</b> A checkbox.</li><li><b>Confirm any lead-time requirement:</b> A text input field.</li><li><b>+ Add attachments:</b> A button for adding files.</li><li><b>Submit Quote / Cancel:</b> Final action buttons at the bottom right.</li></ul> <p>Blue arrows indicate the sequence of actions: one arrow points from the 'Add Costs' button in the screenshot to the F5 instruction, and another arrow points from the 'Submit Quote' button in the screenshot to the F7 instruction.</p>
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**Task G: Submitting a Payment Request**

<p><b>G1</b></p> <p>A Job has to be marked as <i>Complete</i> before a payment request can be made. If this cannot be achieved by the assigned operative (via Task D, above), their assignment can be completed via the Job <i>Edit</i> window and <i>Assignment</i> section.</p>		<p>The screenshot shows the 'JOB25024 - Details' window. It includes fields for Short Description (Pest Control - Insects - Wasps), Location (A012 : Senate-House &gt; ES : External Spaces), Details (graffiti cleaning required), Team (Mike_Service_Provider), Priority (3 - Routine), and Job Due (05/03/2025 11:15). The 'Assignments' section is expanded, showing 'Bob Castle - Scheduled' with a pencil icon for editing and a flag icon for completion. A blue arrow points from the pencil icon to the G2 instruction.</p>
<p><b>G2</b></p> <p>Click the pencil icon to update the assignment.</p>		<p>The screenshot shows the 'Attachments' section with a large empty box for uploading files and a blue 'Add attachment' button at the bottom. A blue arrow points from the G4 instruction to this button.</p>
<p><b>G3</b></p> <p>If no operative can be assigned, the Job can be marked as Complete by clicking the flag.</p>		<p>This is a second view of the 'JOB25024 - Details' window, focusing on the 'Assignments' section. A blue arrow points from the flag icon to the G3 instruction.</p>
<p><b>G4</b></p> <p>Before submitting a payment request, open the <i>Attachments</i> section to upload a job report (or similar, as well as relevant photos).</p>		<p>This is a second view of the 'Attachments' section, showing the upload area and the 'Add attachment' button. A blue arrow points from the G4 instruction to this button.</p>

<p><b>G5</b></p>	<p>When ready to make a payment request, open the <i>Payment Requests &amp; Invoicing</i> section.</p> <p>Click <i>Create new Payment Request</i>.</p>	
<p><b>G6</b></p> <p><b>G7</b></p> <p><b>G8</b></p> <p><b>G9</b></p> <p><b>G10</b></p> <p><b>G11</b></p>	<p>Attach an Invoice.</p> <p>Add a reference which matches the Invoice, a date of issue and a due date 30 days hence.</p> <p>Multiple Job numbers can be added.</p> <p>Issues (red) prevent submission; whereas warnings (amber) are just for information.</p> <p>Click on the Job to expand the info below, relating to any issues &amp; warnings.</p> <p>Click <i>Submit Payment Request</i> (or <i>Save as Draft</i>) at the bottom of the window.</p>	