

**Role:** Supplier Admin

**Task:** Completing a building-level PPM Job

- A. Accessing pre-planned Jobs   B. Assigning operatives   C. Accessing the related Compliance Schedule   D. Uploading documents  
 E. Upload Findings   F. Payment Request   Appendix 1: Document Upload Locations   Appendix 2: Process flowcharts

A. Accessing pre-planned maintenance (PPM) Jobs						
<p><b>A1</b> To see the list of PPM schedules to which your company has been assigned, navigate to <i>Task Management &gt; Planned Jobs</i>.</p> <p><b>A2</b> Schedules are organised according to portfolio locations, and can be filtered by these. (See guide: <a href="#">Searching the Portfolio.</a>)</p> <p><b>A3</b> Schedules can be searched by keyword.</p> <p><b>A4</b> The date of the next upcoming Job for each schedule is given, along with its reference number. This can be used to search for the job in <i>Job List</i> (see step A6).</p>						
<p><b>A5</b> Use the <i>Calendar</i> tab to see schedules by month.</p> <p>Key:</p> <table border="1" data-bbox="324 1109 627 1244"> <tr><td>Future</td></tr> <tr><td>Due/Can Start</td></tr> <tr><td>Overdue</td></tr> <tr><td>Completed</td></tr> <tr><td>Cancelled/Stopped/Skipped</td></tr> </table>	Future	Due/Can Start	Overdue	Completed	Cancelled/Stopped/Skipped	
Future						
Due/Can Start						
Overdue						
Completed						
Cancelled/Stopped/Skipped						

<p><b>A6</b> Navigate to <i>Task Management &gt; Job Manager &gt; Job List</i>.</p> <p><i>By default, only Jobs having reached their Due date will be listed.</i></p> <p><b>A7</b> To see Jobs scheduled but not yet due, click  to open Filters, then select 'All jobs', plus a suitable date range.</p> <p>Scheduled Jobs can also be searched for, using a Job number found via <i>Task Management &gt; Planned Jobs (Step A4)</i>.</p> <p><i>Other filter settings, including dates, can also be changed here and views can be saved as 'Scenes' for future use.</i></p> <p><b>A8</b> Click  again to close the Filter settings.</p> <p><i>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.</i></p>	
<p><b>A9</b> In <i>Job List</i>, click on a Job to open its <i>Job Panel</i>.</p> <p><b>A10</b> 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: <a href="mailto:efhelpdesk@admin.cam.ac.uk">efhelpdesk@admin.cam.ac.uk</a>.</i></p> <p><i>Building addresses and postcodes can be found in the Portfolio section of Invida.</i></p> <p><i>These details will soon be available within the Warning/Hazards section of a Job edit window.</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> <i>Closed</i></p>

## B. Assigning operatives to Jobs

**B1** In the *Job Panel*, click  **Focus** to open *Team Diary* (or via *Assignment* section in *Edit* window).

**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.

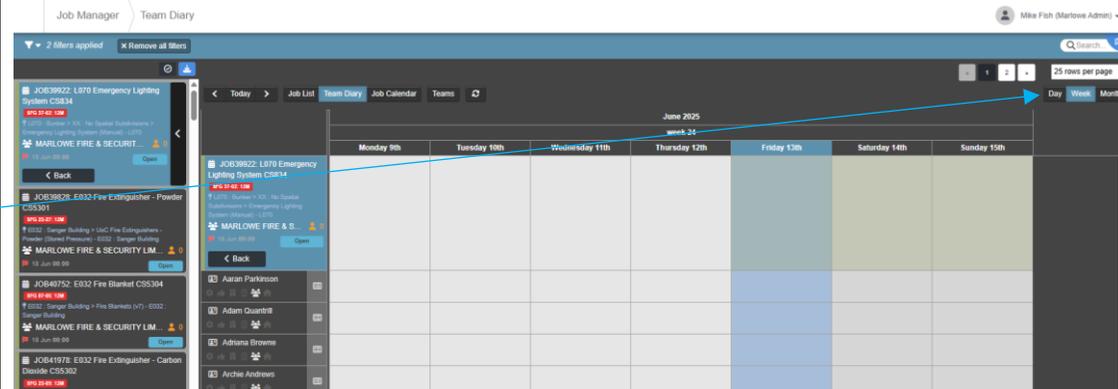
Click  to finish.

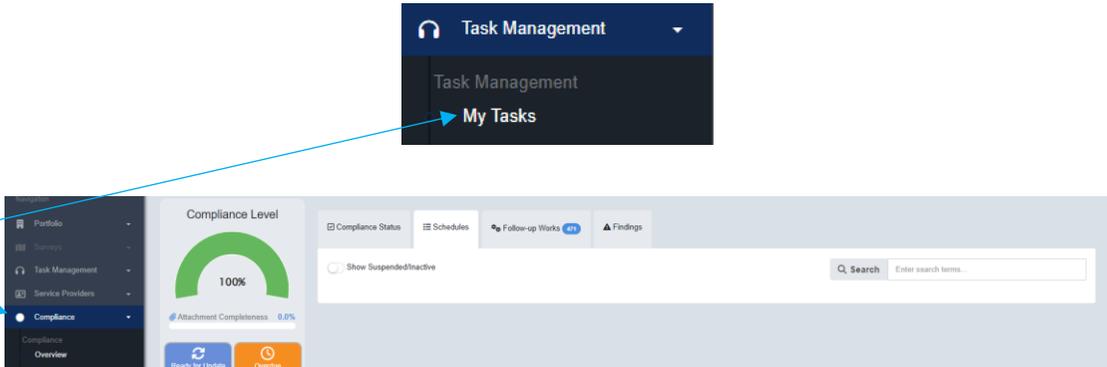
This will send a notification to the operative's mobile app. See guide: [Mobile App – PPM Jobs](#).

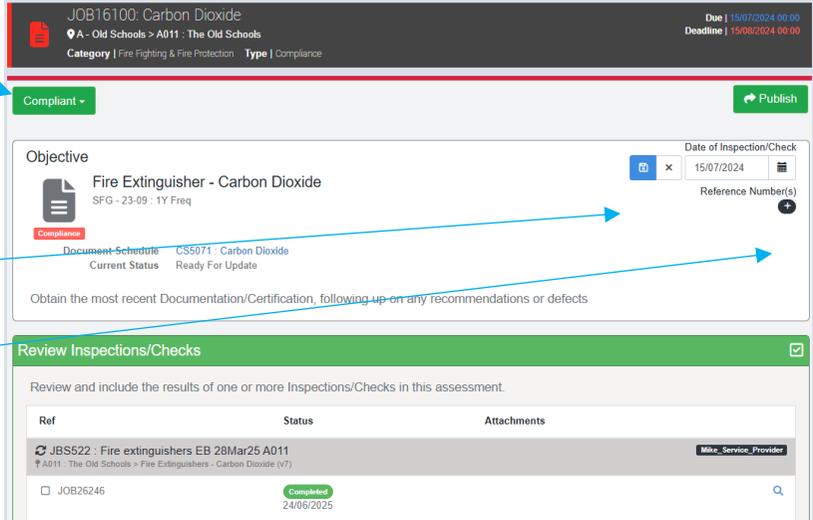
**B3** Click  to see all existing assignments for an operative.

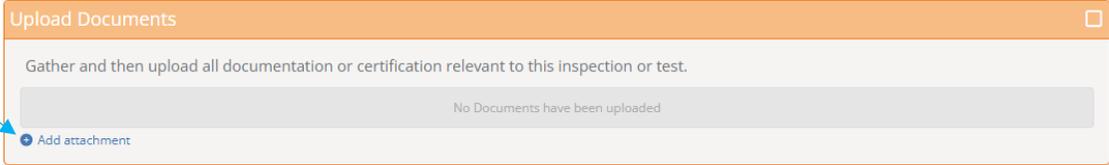
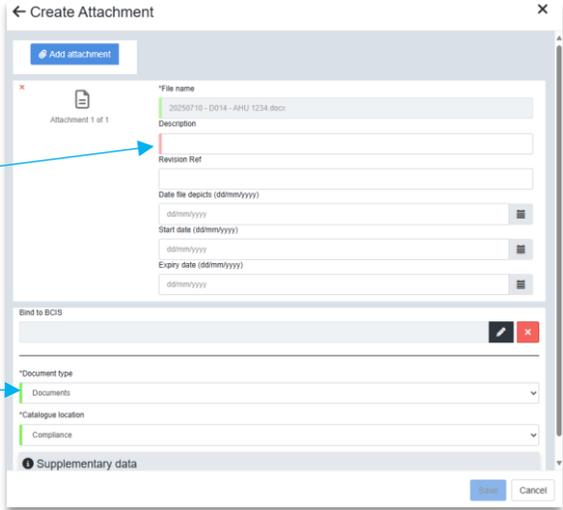
If an operative cannot be found in the list, check there are enough rows displayed by changing the 'rows per page' setting (top-right). If they do not yet have an account, they can be added via the *Service Provider* section in the navigation bar.

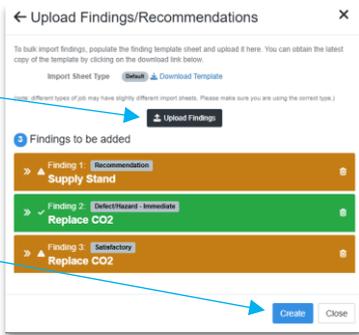
When all operatives assigned to a Job have completed their assignment, the Job status will change to *Complete*. If necessary, this can be done on their behalf via the *Assignments* section of the *Job Edit* window. Alternatively, complete the Job via the *Flag* (top-right in *Edit* window).



<b>C. Accessing the related Compliance Schedule</b> (If asset-related risk assessment, STOP and follow alternative guide: <i>Completing asset related PPM Job</i> )	
<p><b>C1</b> Make sure the related Job is <i>Complete</i>.</p> <p><b>C2</b> The reference number of the Compliance Schedule related to the completed PPM Job begins CS and can be found at the end of the Job's short description. (E.g. CS1234)</p> <p><b>C3</b> Access the related Compliance Schedule, either via an email notification, <i>My Tasks</i>, or the Schedules tab in <i>Compliance &gt; Overview</i>.</p> <p><b>C4</b> Use the search box to find the required schedule, if necessary.</p>	
<p><b>C5</b> Click on a Schedule to open its History page.</p> <p><b>C6</b> If a previous inspection listed shows Open Findings, click <i>View</i>, to the right, to make sure duplicates are not uploaded. Please seek guidance if required.</p> <p><b>C7</b> Click <i>Update</i> next to current inspection listed, to open it.</p>	

<p><b>C8</b> If necessary, click <b>Compliant</b> to change to Non-compliant. <i>Note: LRAs and FRAs can always be left as Compliant.</i></p> <p><b>C9</b> After giving a reason for the change, the schedule status will change to: <b>Non-compliant</b></p> <p><b>C10</b> Set the date of the inspection and save.</p> <p><b>C11</b> If the inspection could not be carried out, NOT INSPECTED can be added as a temporary reference, plus . (If used don't <i>Publish for Review</i> or <i>Publish</i>.)</p> <p><b>C12</b> The related Job will be shown as <i>Completed</i>. (Leave this unticked.)</p>		 <p>The screenshot shows the INVIDA system interface for a job titled 'JOB16100: Carbon Dioxide'. The job is currently marked as 'Compliant'. The interface includes a 'Publish' button and a 'Date of Inspection/Check' field set to '15/07/2024'. The objective is 'Fire Extinguisher - Carbon Dioxide' with a current status of 'Ready For Update'. Below this, there is a 'Review Inspections/Checks' section with a table of related jobs. The table has columns for 'Ref', 'Status', and 'Attachments'. One job is listed: 'JBS522: Fire extinguishers EB 28Mar25 A011' with a status of 'Completed' and a date of '24/06/2025'.</p>
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D. Uploading documents	
<p><b>D1</b> In the Compliance Schedule (not the PPM Job), click <i>Add attachment</i> in the <i>Upload Documents</i> sections.</p>	
<p><b>D2</b> Please use the file naming convention: <i>Date – Building – Inspection – Asset or system</i> E.g. <i>20260123-M032-Cistern 12457</i> <i>20260314-F131-Generator 16767</i> <i>20260609-W011-Fire Alarm System</i></p>	
<p><b>D3</b> Add a short description for the uploaded file.</p>	<p><b>D4</b> See <a href="#">Appendix 1</a> for details of which <i>Document type</i> and <i>Catalogue Location</i> to select.</p>
<p><b>D5</b> Click <i>Save</i> to close window and return to compliance record.</p>	

E. Upload Findings	
<p><b>E1</b> Download and complete the relevant Excel <i>Remedial Action Template</i> from:  <a href="http://www.em.admin.cam.ac.uk/what-we-do/estate-operations/estate-maintenance/remedial-action-templates">www.em.admin.cam.ac.uk/what-we-do/estate-operations/estate-maintenance/remedial-action-templates</a></p> <p><b>E2</b> Click <i>Upload Findings</i>.</p> <p><b>E3</b> In the Upload window, click <i>Upload Findings</i>.</p> <p><b>E4</b> Review the <i>Findings to be added</i>.</p> <p><b>E5</b> Click <i>Create</i> to add the <i>Findings</i> to the record.</p> <p><i>Note: Upload will be blocked if any cells contain more than 200 characters.</i></p> <p><b>E6</b> Click <span style="background-color: #28a745; color: white; padding: 2px 5px;">➔ Publish for Review</span> (or <i>Publish</i>) to finish and send a notification to the relevant Estates team.</p>	 

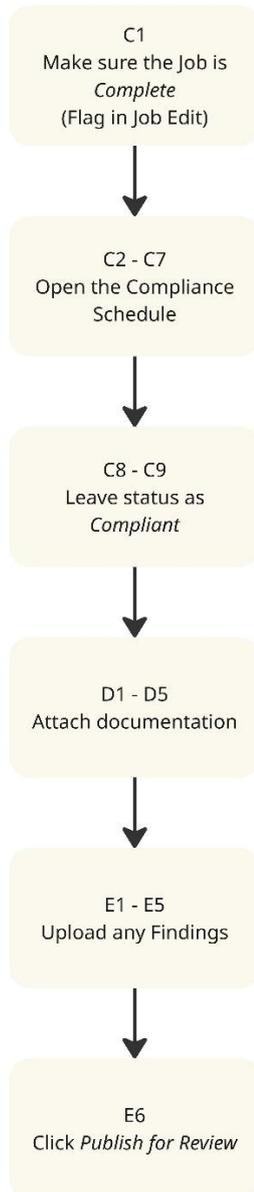
F. Submitting a Payment Request	
<p><b>F1</b> A Payment Request and invoice can now be submitted from the Job Edit window.</p> <p>See guide: <a href="#">Submit Payment Request</a>.</p>	

Appendix 1: Document upload locations		
Inspection Type	Document Type	Catalogue Location
Legionella Risk Assessment	Risk Assessment	Compliance > Management Assessment and Review Tasks > Independent Legionella Risk Assessment
Fire Risk Assessment	Risk Assessment	Compliance > Risk Assessment & Review > Fire Risk Assessment
Asbestos Reinspection Reports	Risk Assessment	Compliance > Risk Assessment & Review > Asbestos Register Re-inspection
Electrical Installation Condition Reports	Surveys & Inspection	Compliance > Electrical Installations > Electrical Safety Checks (EICR)
TM44 Survey Reports	Risk Assessment	Compliance > Risk Assessment & Review > Air Conditioning Inspection (TM44)

[Return to D. Uploading documents](#)

## Appendix 2 – Process flowcharts

### LRA & FRA process:



### EICR inspection process:

