Role: Supplier Admin **Task**: Completing a building-level PPM Job

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

<table>
<tr><th colspan="3">A. Accessing pre-planned maintenance (PPM) Jobs</th></tr>
<tr><td>A1

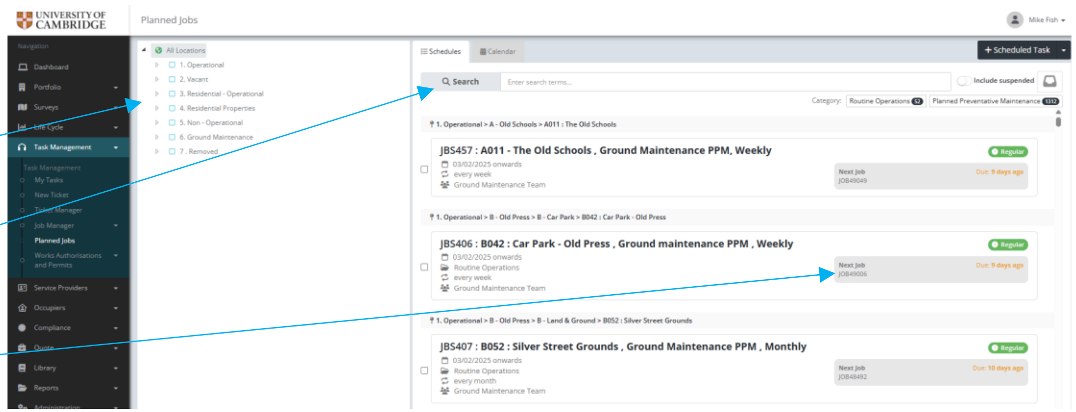
A2

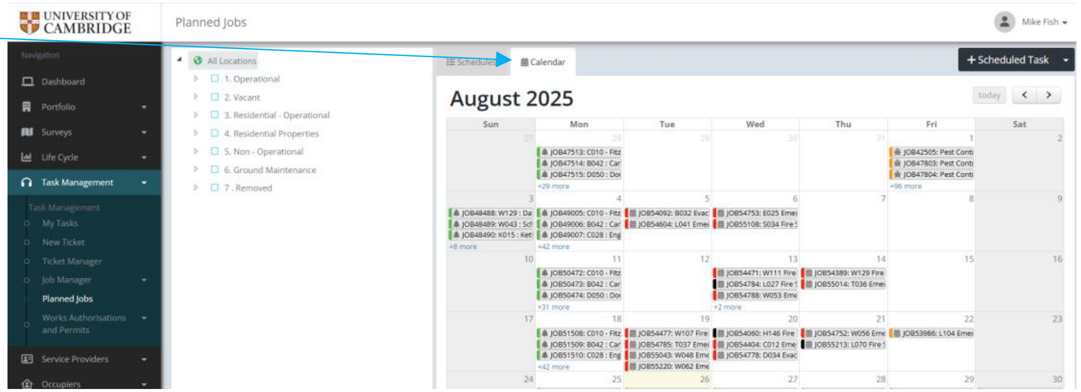
A3

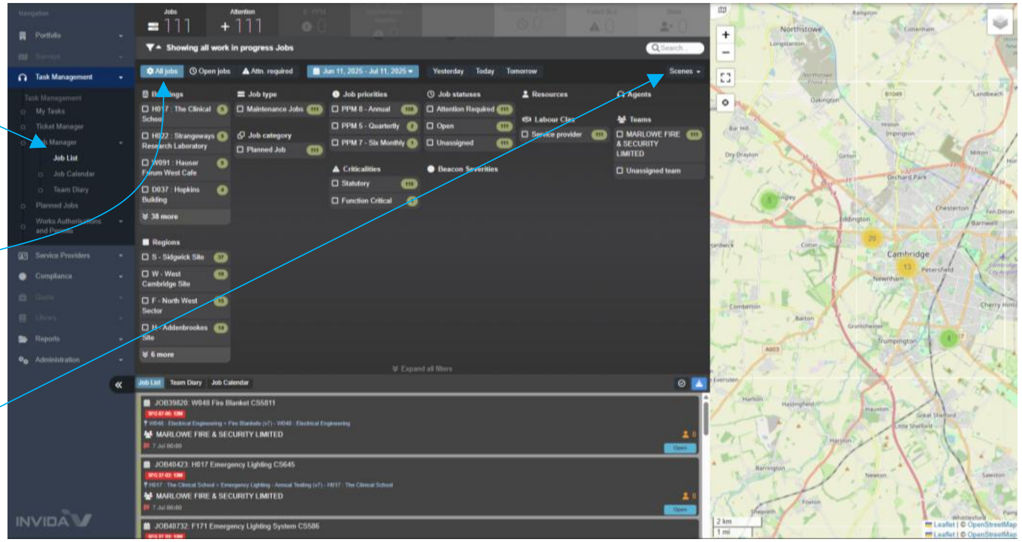
A4</td><td>To see the list of PPM schedules to which your company has been assigned, navigate to Task Management > Planned Jobs.

Schedules are organised according to portfolio locations, and can be filtered by these. (See guide: Searching the Portfolio.)

Schedules can be searched by keyword.

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 Job List (see step A6).</td><td>
</td></tr>
<tr><td>A5</td><td>Use the Calendar tab to see schedules by month.

Key:
Future
Due/Can Start
Overdue
Completed
Cancelled/Stopped/Skipped</td><td>
</td></tr>
</table>

<table>
<tr>
<td></td>
<td>Email notifications for Pre-planned Jobs are scheduled 30 days in advance of when targeted for completion.</td>
<td rowspan="5"></td>
</tr>
<tr>
<td>A6</td>
<td>Navigate to Task Management > Job Manager > Job List.

By default, only Jobs having reached their Due date will be listed.</td>
</tr>
<tr>
<td>A7</td>
<td>To see Jobs scheduled but not yet due, click to open Filters, then select ‘All jobs’, plus a suitable date range.

Scheduled Jobs can also be searched for, using a Job number found via Task Management > Planned Jobs (Step A4).

Other filter settings, including dates, can also be changed here and views can be saved as ‘Scenes’ for future use.</td>
</tr>
<tr>
<td>A8</td>
<td>Click again to close the Filter settings.

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.</td>
</tr>
<tr><td></td><td></td></tr>
<tr>
<td>A9

A10</td>
<td>In Job List, click on a Job to open its Job Panel.

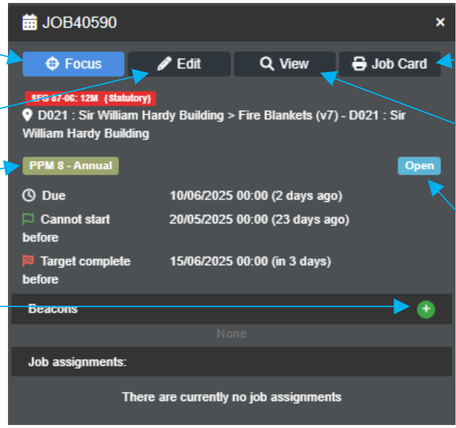
Contact the relevant building manager, outside of Invida, to arrange visit times.

Building manager contact details can be obtained via the helpdesk: efhelpdesk@admin.cam.ac.uk.
Building addresses and postcodes can be found in the Portfolio section of Invida.
These details will soon be available within the Warning/Hazards section of a Job edit window.</td>
<td>Focus: Link to Team Diary (see B1 below).

Edit: Job interactions (see C1 below).

SLA

Add Beacon to flag a message for the helpdesk, inc. requesting an SLA break.



Job Card: Simplified view of details for printing or saving as pdf.

View: Screen-friendly view of details, inc. timeline of actions taken.

Job Status: Scheduled, Open, Complete or Closed</td>
</tr>
</table>

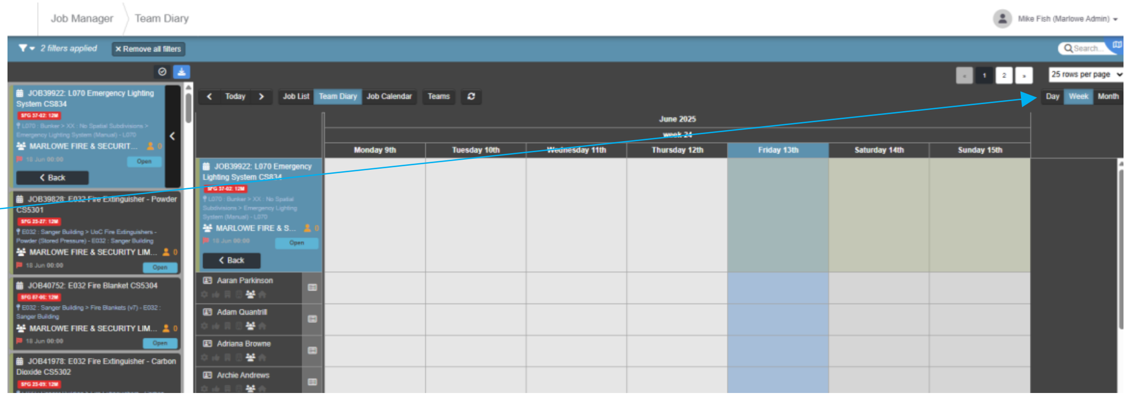
B. Assigning operatives to Jobs

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 Save changes 1 to finish.

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

B3 Click the list icon 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.

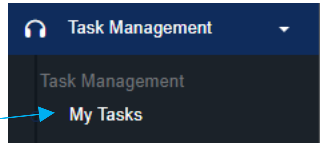
When all operatives assigned to a Job have completed their assignment, the Job status will change to Complete. If necessary, this can be done on their behalf via the Assignments section of the Job Edit window. Alternatively, complete the Job via the Flag (top-right in Edit window).

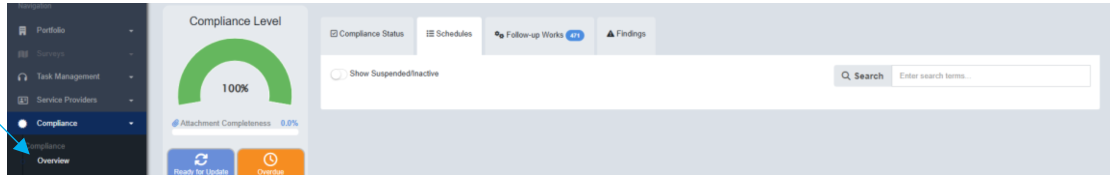
<table>
<tr><th colspan="3">C. Accessing the related Compliance Schedule
(If asset-related risk assessment, STOP and follow alternative guide: Completing asset related PPM Job)</th></tr>
<tr><td>C1

C2

C3</td><td>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)

Access the related Compliance Schedule, either via an email notification, My Tasks, or the Schedules tab in Compliance > Overview.

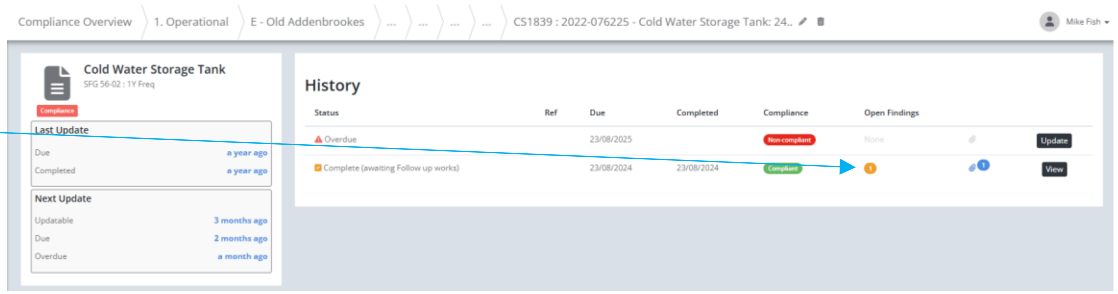
Use the search box to find the required schedule, if necessary.</td><td>

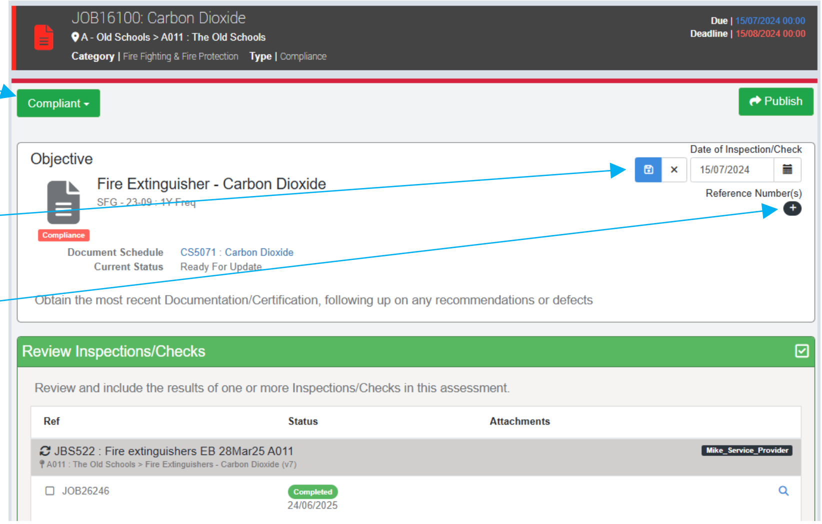

</td></tr>
<tr><td>C4

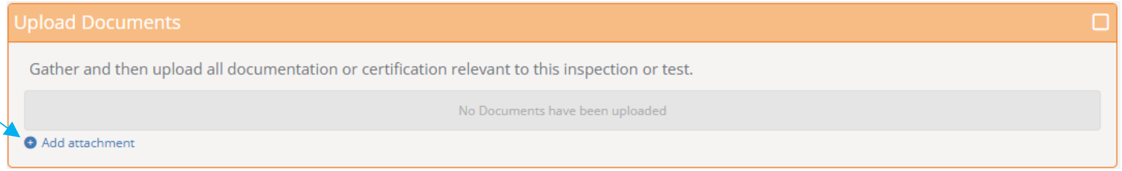
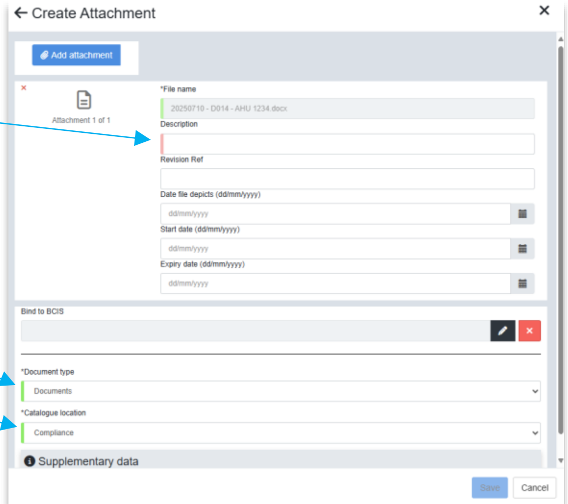
C5

C6</td><td>Click on a Schedule to open its History page.

If a previous inspection listed shows Open Findings, click View, to the right, to make sure duplicates are not uploaded. Please seek guidance if required.

Click Update next to current inspection listed, to open it.</td><td>
</td></tr>
</table>

C7	If necessary, click **Compliant ▾** to change to Non-compliant.	
C8	After giving a reason for the change, the schedule status will change to: **Non-compliant ▾**	
C9	Set the date of the inspection and save.	
C10	If the inspection could not be carried out, NOT INSPECTED can be added as a temporary reference, plus . (If used don't *Publish for Review* or *Publish*.)	
C11	The related Job will be shown as *Completed*. (Leave this unticked.)	

<table>
<tr><th colspan="3">D. Uploading a certificate</th></tr>
<tr><td>D1</td><td>Click Add attachment in the Upload Documents sections.</td><td>
</td></tr>
<tr><td>D2</td><td>Add a short description for the uploaded file.</td><td rowspan="4">
</td></tr>
<tr><td>D3</td><td>In Document type, select Certificates.</td></tr>
<tr><td>D6</td><td>In Catalogue location, select the most appropriate item beginning Compliance >.</td></tr>
<tr><td>D7</td><td>Click Save to close window and return to compliance record.</td></tr>
</table>

E. Upload Findings and Recommendations

E1 Download and complete the relevant Excel *Remedial Action Template* from: www.em.admin.cam.ac.uk/what-we-do/estate-operations/estate-maintenance/remedial-action-templates

E2 Click *Upload Findings*.

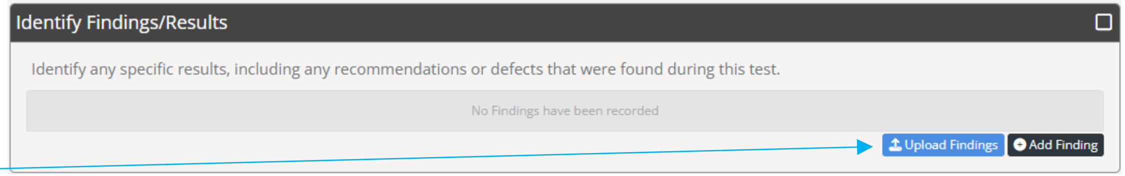
E3 In the Upload window, click *Upload Findings*.

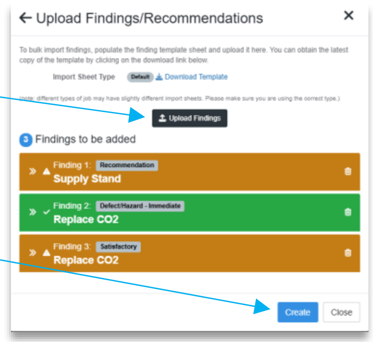
E4 Review the *Findings to be added*.

E5 Click *Create* to add the *Findings* to the record.

Note: Upload will be blocked if any cells contain more than 200 characters.

E6 Click **Publish for Review** (or *Publish*) to finish and send a notification to the relevant Estates team.





F. Submitting a Payment Request

F1 A Payment Request and invoice can now be submitted from the Job Edit window.

See guide: Submit Payment Request.