

Role: Supplier Admin

Task: Completing a building-level PPM Job

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A. Accessing pre-planned maintenance (PPM) Jobs

A1 To see the list of PPM schedules to which your company has been assigned, navigate to *Task Management > Planned Jobs*.

A2 Schedules are organised according to portfolio locations, and can be filtered by these. (See guide: [Searching the Portfolio](#).)

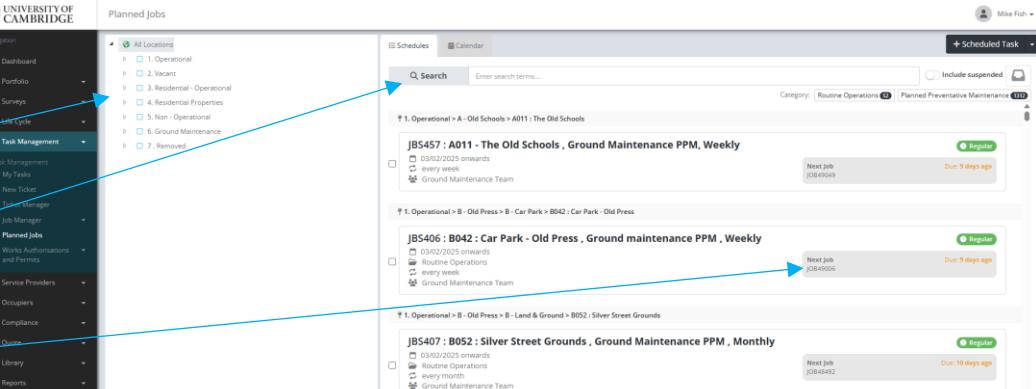
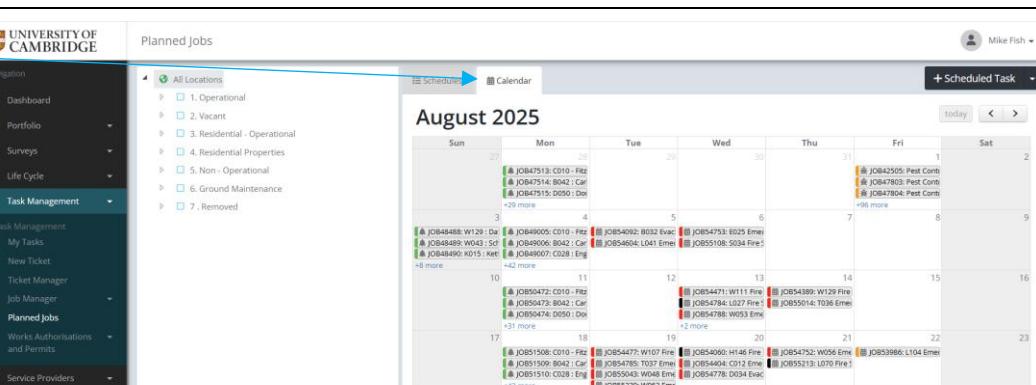
A3 Schedules can be searched by keyword.

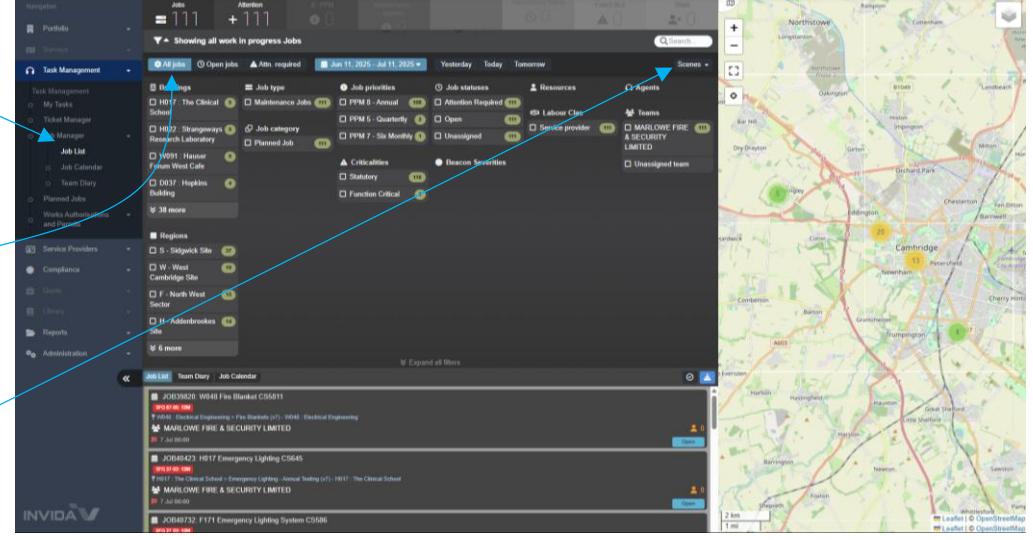
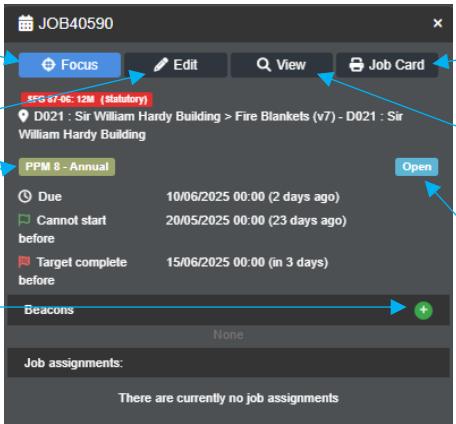
A4 The date of the next upcoming Job for each schedule is given, along with its reference number. This can be used to search for the job in *Job List* (see step A6).

A5 Use the *Calendar* tab to see schedules by month.

Key:

Future
Due/Can Start
Overdue
Completed
Cancelled/Stopped/Skipped

<p>A6 Email notifications for Pre-planned Jobs are scheduled 30 days in advance of when targeted for completion.</p> <p>A7 Navigate to <i>Task Management > Job Manager > Job List</i>. By default, only Jobs having reached their Due date will be listed.</p> <p>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 > Planned Jobs</i> (Step A4).</p> <p>Other filter settings, including dates, can also be changed here and views can be saved as 'Scenes' for future use.</p> <p>A8 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>A9 In <i>Job List</i>, click on a Job to open its <i>Job Panel</i>.</p> <p>A10 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><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: Scheduled, Open, Complete or Closed</p>

B. Assigning operatives to Jobs

B1 In the *Job Panel*, click  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    to navigate between days.

To assign to an arranged time on a particular day, click *Day* to display time slots.

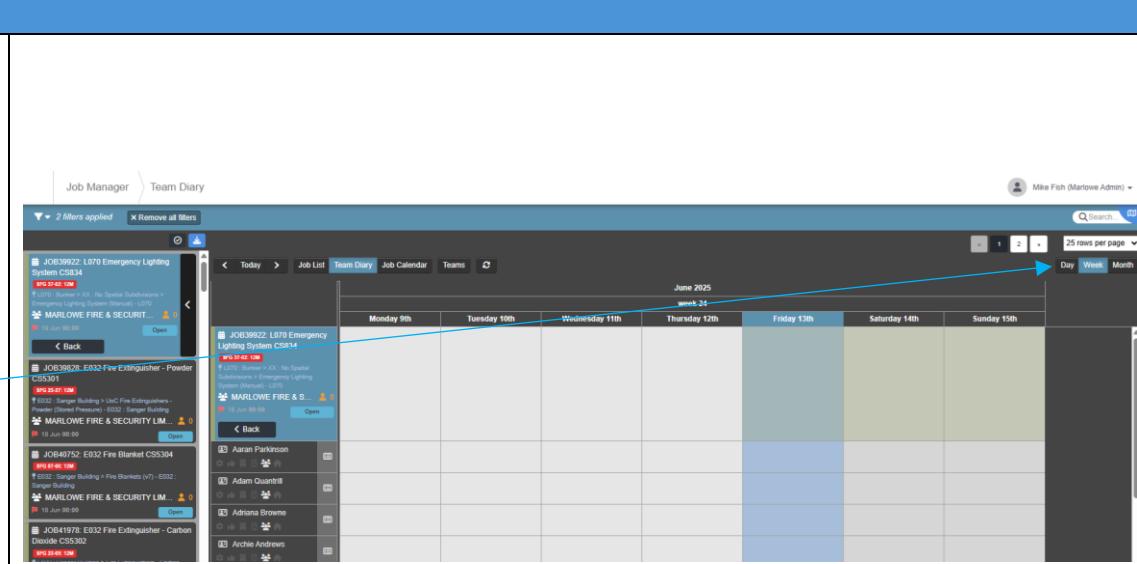
Click   to finish.

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.

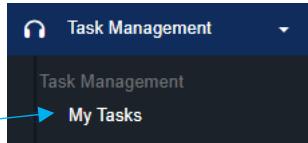
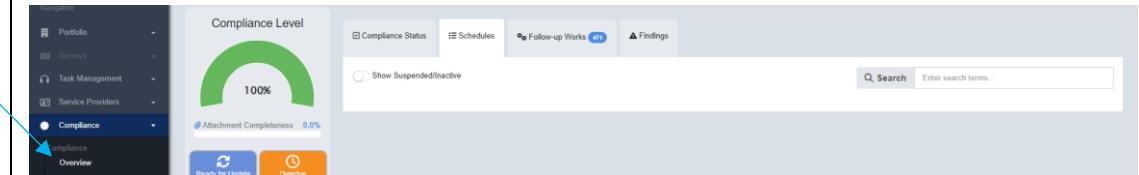
If an operative cannot be found in the list, check there are enough rows displayed by changing the 'rows per page' setting (top-right). If they do not yet have an account, they can be added via the Service Provider section in the navigation bar.

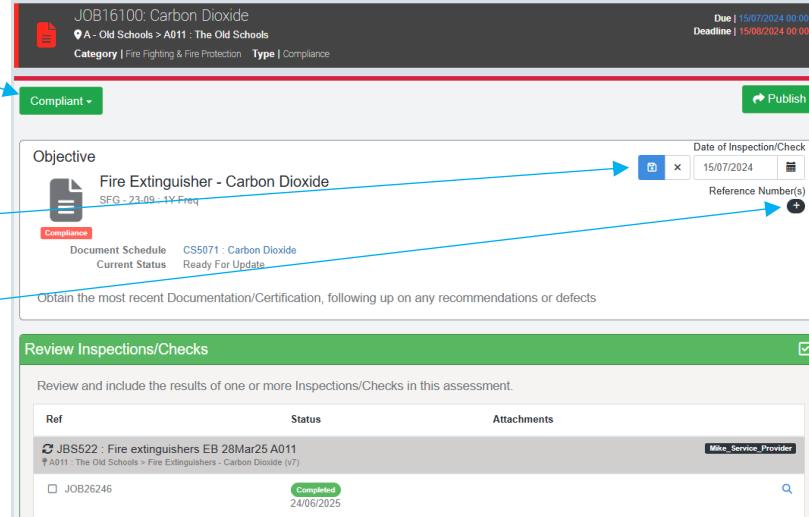
When all operatives assigned to a Job have completed their assignment, the Job status will change to Complete. If necessary, this can be done on their behalf via the Assignments section of the Job Edit window. Alternatively, complete the Job via the Flag (top-right in Edit window).

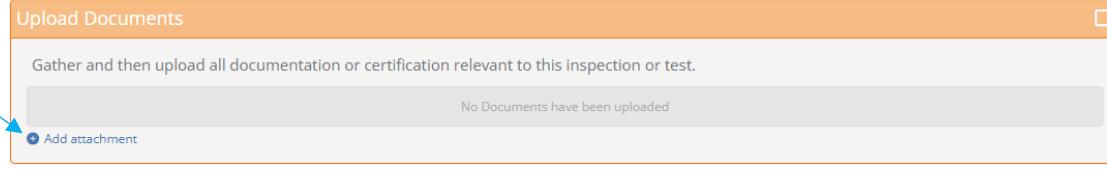
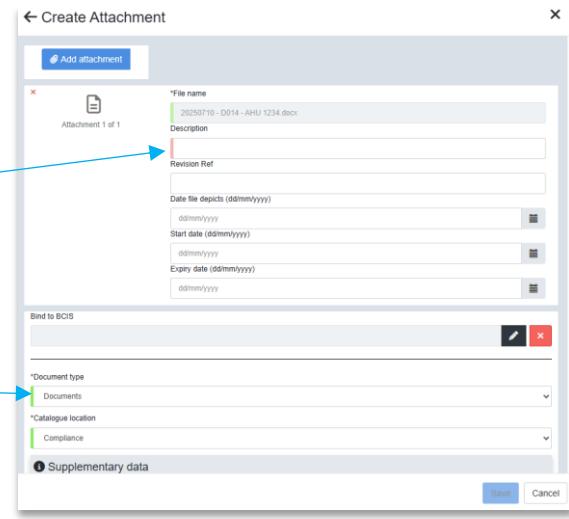


C. Accessing the related Compliance Schedule

(If asset-related risk assessment, STOP and follow alternative guide: *Completing asset related PPM Job*)

C1	<p>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>	
C2	<p>Access the related Compliance Schedule, either via an email notification, <i>My Tasks</i>, or the Schedules tab in <i>Compliance > Overview</i>.</p>	
C3	<p>Use the search box to find the required schedule, if necessary.</p>	
C4	<p>Click on a Schedule to open its History page.</p>	
C5	<p>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>	
C6	<p>Click <i>Update</i> next to current inspection listed, to open it.</p>	

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 <i>Publish for Review</i> or <i>Publish</i> .) C11 The related Job will be shown as <i>Completed</i> . (Leave this unticked.)	

D. Uploading documents	
D1	In the Compliance Schedule (not the PPM Job), click <i>Add attachment</i> in the <i>Upload Documents</i> sections.
	
D2	<p>Please use the file naming convention: <i>Date – Building – Inspection – Asset or system</i></p> <p>E.g. 20260123-M032-Cistern 12457 20260314-F131-Generator 16767 20260609-W011-Fire Alarm System</p>
D3	Add a short description for the uploaded file.
D4	See Appendix 1 for details of which <i>Document type</i> and <i>Catalogue Location</i> to select.
D5	Click <i>Save</i> to close window and return to compliance record.
	

E. Upload Findings

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*.

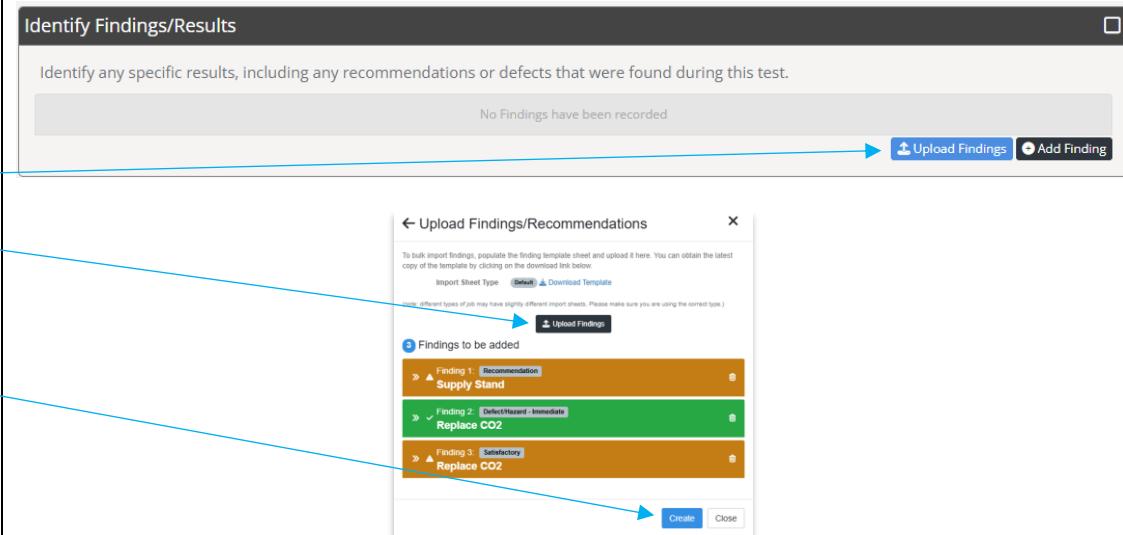
E3 In the Upload window, click *Upload Findings*.

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



Identify Findings/Results

Identify any specific results, including any recommendations or defects that were found during this test.

No Findings have been recorded

Upload Findings **Add Finding**

Upload Findings/Recommendations

To bulk import findings, populate the finding template sheet and upload it here. You can obtain the latest copy of the template by clicking on the download link below.

Import Sheet Type: **Default** **Download Template**

Note: Different types of job may have slightly different import sheets. Please make sure you are using the correct type.

Findings to be added

- » **Finding 1: Recommendation**
Supply Stand
- » **Finding 2: Defect/Hazard - Immediate**
Replace CO2
- » **Finding 3: Satisfactory**
Replace CO2

Create **Close**

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](#).



Payment Requests & Invoicing

Billable Job **+ Create new Payment Request** Non-billable Job

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](#)