


**Role:** Supplier Admin      **Task:** Completing an asset related PPM Job

[A. Accessing pre-planned Jobs](#)   [B. Assigning operatives](#)   [C. Uploading documentation](#)   [D. Uploading Findings](#)



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>The screenshot shows the 'Planned Jobs' page with a sidebar navigation menu. The 'Planned Jobs' section is active, displaying a list of schedules. A search bar is visible at the top right. Three specific schedules are highlighted with blue arrows pointing to their details: JB5457, JB5406, and JB5407. Each entry shows the location, frequency, and the next job date.</p>					
<p><b>A5</b> Use the <i>Calendar</i> tab to see schedules by month.</p> <p><b>Key:</b></p> <table border="1" style="margin-left: 20px;"> <tr><td style="background-color: #e0e0e0;">Future</td></tr> <tr><td style="background-color: #FFD700;">Due/Can Start</td></tr> <tr><td style="background-color: #FF0000;">Overdue</td></tr> <tr><td style="background-color: #00FF00;">Completed</td></tr> <tr><td style="background-color: #808080;">Cancelled/Stopped/Skipped</td></tr> </table>	Future	Due/Can Start	Overdue	Completed	Cancelled/Stopped/Skipped	<p>The screenshot shows the 'Planned Jobs' page with the 'Calendar' tab selected. A calendar for August 2025 is displayed, showing various jobs as colored blocks. A blue arrow points from the 'Calendar' tab in the interface to the calendar view. The key below explains the colors: Future (grey), Due/Can Start (yellow), Overdue (red), Completed (green), and Cancelled/Stopped/Skipped (black).</p>
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 Warnings/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> or <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.

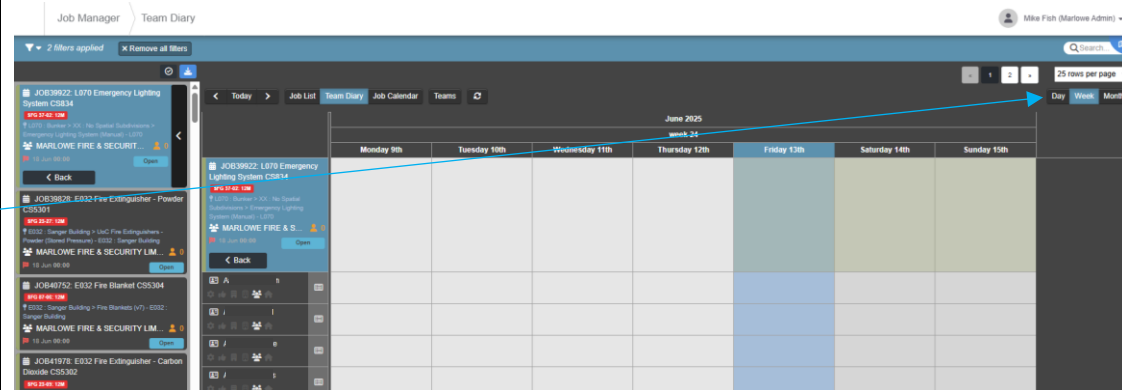
Click  to finish.

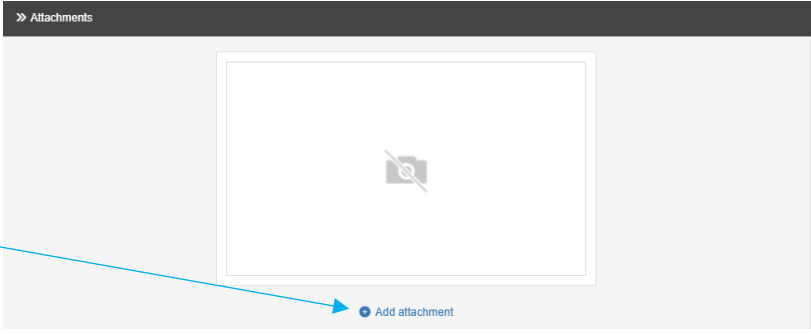
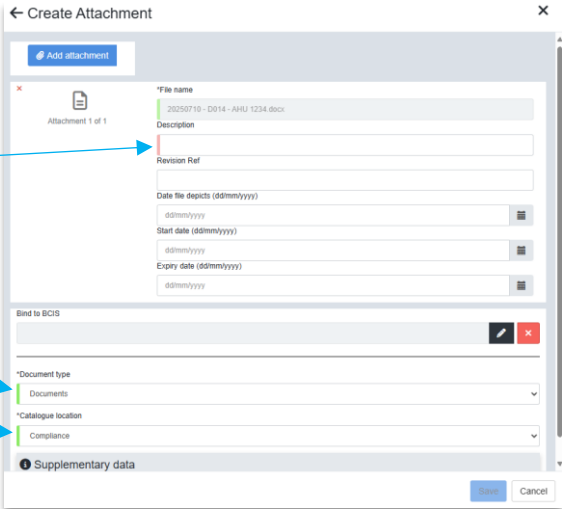
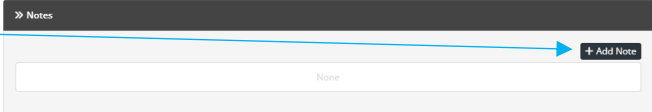
This will send a notification to the operative's mobile app. See guide: [Mobile App – PPM Jobs](#).

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

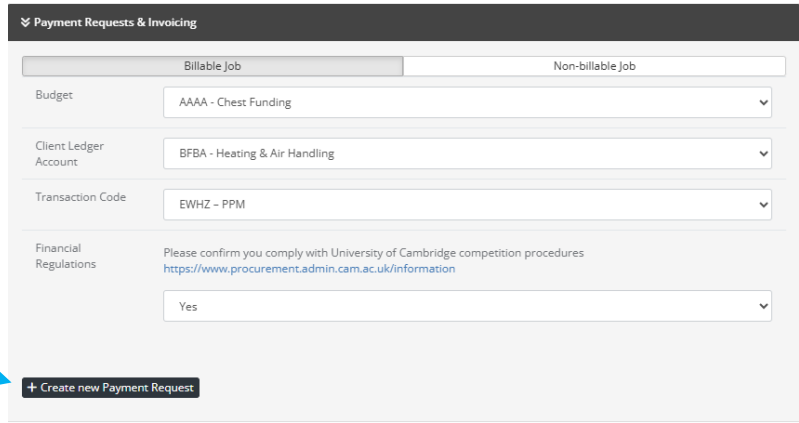
If an operative cannot be found in the list, check there are enough rows displayed by changing the 'rows per page' setting (top-right). If they do not yet have an account, they can be added via your *Service Provider* section in the navigation bar.

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. Uploading documentation (If building-level risk assessment, e.g. EICR, LRA, FRA, STOP and follow alternative guide: <i>Completing building-level PPM Job</i> )		
<p><b>C1</b> Click <i>Edit</i> in <i>Job Panel</i> to open the Edit window.</p> <p><b>C2</b> Open the <i>Attachments</i> section.</p> <p><b>C3</b> Upload a certificate, service sheet or job report.</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><b>C4</b> Please use the file naming convention: <i>Date – Building – Inspection – Asset or system</i> E.g. <i>20260123-M032-Cistern 12457</i> <i>20260609-W011-Fire Alarm System</i></p> <p><b>C5</b> Add a short description for the uploaded file.</p> <p><b>C6</b> Click <i>Document Type</i> and select <i>PPM Reports</i>.</p> <p><b>C7</b> In <i>Catalogue location</i>, select <i>PPM Catalogue</i>.</p> <p><b>C8</b> Click <i>Save</i> to close window.</p>		
<p><b>C8</b> Add a brief note within the Job Edit window to indicate whether the asset(s) are Compliant or Non-Compliant.</p>		

D. Uploading Findings (If building-level risk assessment, e.g. EICR, LRA, FRA, STOP and follow alternative guide: <i>Completing building-level PPM Job</i> )	
<p><b>D1</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><i>Note: Upload will be blocked if any cells contain more than 200 characters.</i></p>	
<p><b>D2</b> Click <i>Upload Findings ...</i></p>	
<p><b>D3</b> ... then click <i>Upload Findings</i> and browse to your saved file.</p>	
<p><b>D4</b> Review the <i>Findings to be added</i>.</p>	
<p><b>D5</b> If any Findings are coloured amber or red, click on them to see description of potential issue.</p>	
<p><b>D6</b> Details can be edited below, before clicking <i>Create</i>.</p>	

<b>D7</b>	If an updated certificate is required once remedials have been addressed, steps in section C can be repeated at any point.	
<b>D8</b>	When ready, a Payment Request can be submitted via the Job Edit window.  See guide: <a href="#">Submit Payment Request</a> .	