

**Role:** Service Provider Administrators

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

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

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

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

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

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For support contact:

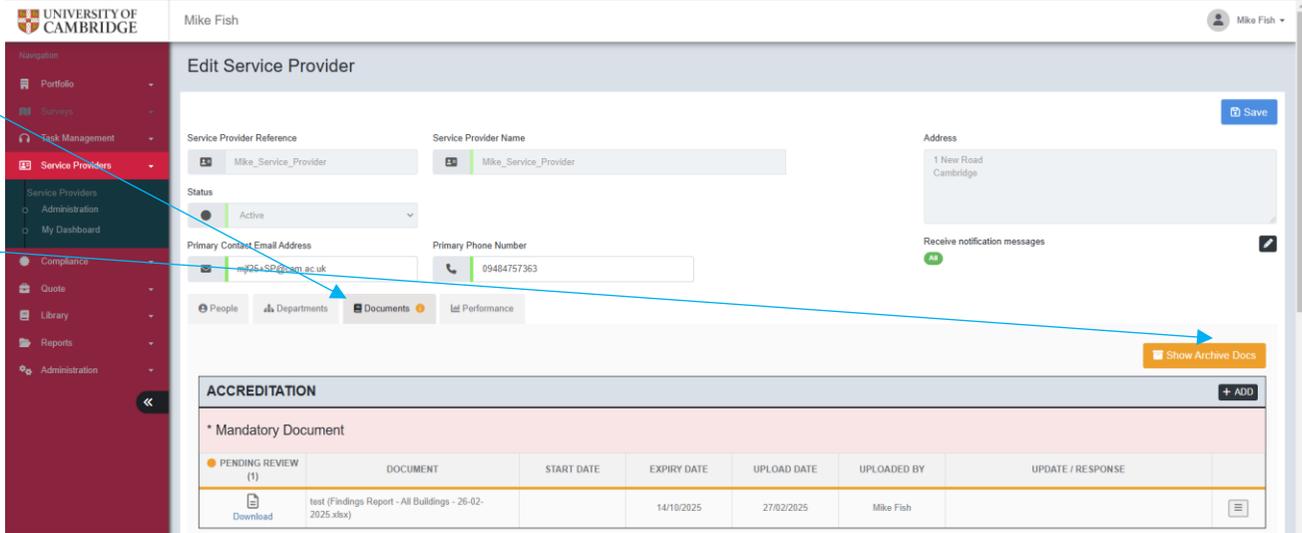
[estates.invidasupport](mailto:estates.invidasupport)

[@admin.cam.ac.uk](mailto:@admin.cam.ac.uk)

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**

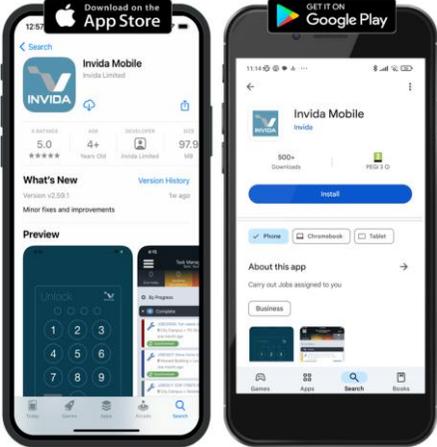
<p><b>B1</b> Navigate to <i>Service Providers</i> &gt; <i>Administration</i>.</p>	
<p><b>B2</b> Ensure <i>Primary Contact Email Address</i> is appropriate to receive automated email notifications (click pencil to see these).</p>	
<p><b>B3</b> Notifications can be sent to additional email addresses by 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>	

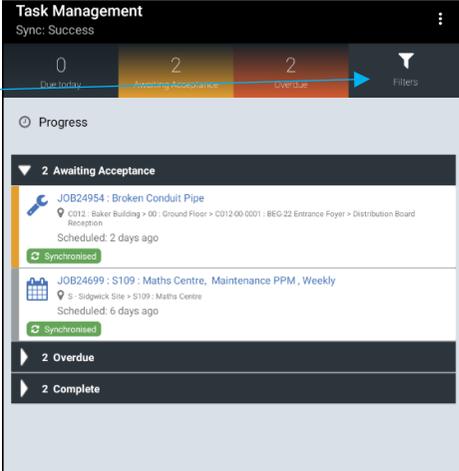
<p><b>B6</b></p>	<p>To add Documentation, Click <i>Documents</i> tab.</p> <p><i>Document requirements can be obtained from <a href="mailto:cow@admin.cam.ac.uk">cow@admin.cam.ac.uk</a>.</i></p>	
<p><b>B7</b></p>	<p>Click <b>+ADD</b> and complete required details.</p>	
<p><b>B8</b></p>	<p>Click <b>Save</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

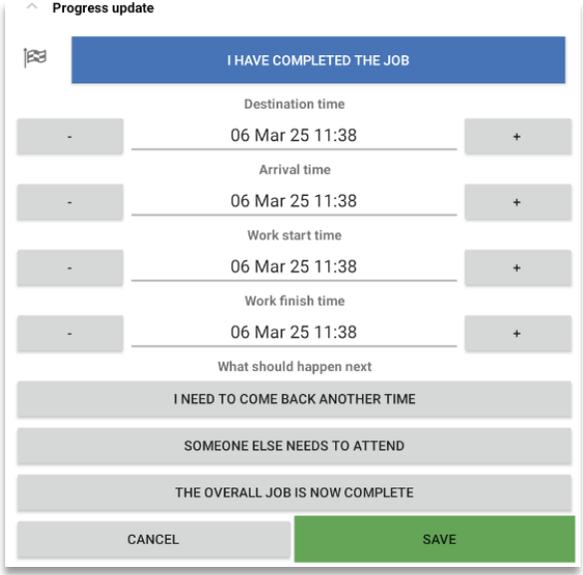
<p><b>C1</b> Follow the link in the email notification, or navigate to <i>Task Management &gt; Job Manager &gt; Job List</i>.</p> <p><b>C2</b> Click <b>Accept</b> and confirm. <i>If you need to Reject the Job, an explanatory comment can be added.</i></p> <p><b>C3</b> To assign an operative, click <i>Focus</i> to open <i>Team Diary</i>.</p>	<p>The screenshot shows the 'Job Manager' interface. On the left is a navigation menu with 'Task Management' selected. The main area displays a list of jobs. Job 'JOB25024: Pest Control - Insects - Wasps' is highlighted. A modal window for this job is open, showing details like location (Senate-House &gt; ES: External Spaces), due date (05/03/2025 11:15), and target completion date (25/03/2025 11:15). There are 'Accept' and 'Reject' buttons in the modal. A 'Focus' button is also visible, which leads to the next screenshot.</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. It features a calendar grid for the week of March 10th to 15th, 2025. A list of jobs is shown on the left, with 'JOB25024: Pest Control - Insects - Wasps' highlighted in blue. A blue arrow indicates dragging this job to a box next to the name 'Bob Castle' in the calendar. Another blue arrow points to the 'Save changes' button in the top right corner of the interface.</p>

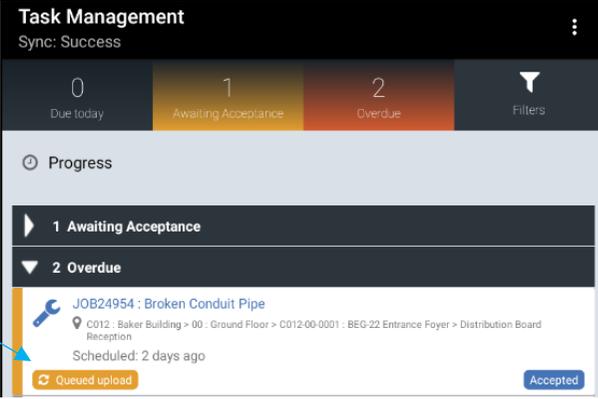
**Task D: Operatives' Invida Mobile app**

<p><b>D1</b></p> <p><b>D2</b></p> <p><b>D3</b></p>	<p>Download the free Invida Mobile app from the device's Apple or Android Store.</p> <p>See B5 above to set up an operative user account.</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>	
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<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>	
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<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>	

<p><b>D16</b></p>	<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.

The screenshot shows the 'Job Manager' interface. On the left is a navigation menu with options like Portfolio, Services, Task Management, My Tasks, Ticket Manager, Job Manager, Planned Jobs, Service Providers, Compliance, Quote, Library, Reports, and Administration. The main area displays a list of jobs. One job, 'JOB24954: Broken Conduit Pipe', is selected. A detailed panel for this job is open, showing its location, details, and a 'Request an uplift' button. A blue arrow points from the 'Edit' button in the job list to the 'Edit' button in the job details panel.

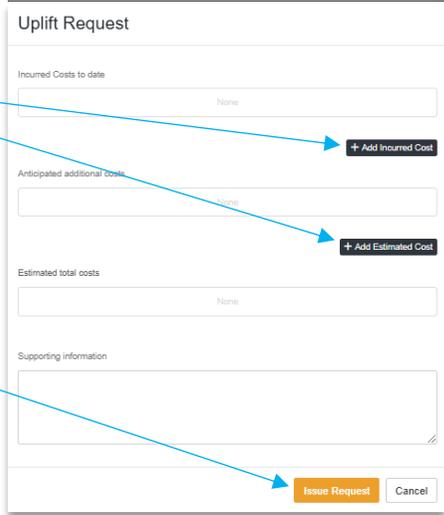
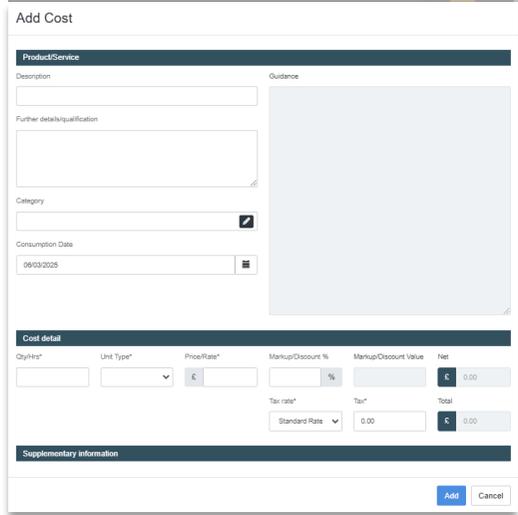
**E2** Open the Authorised NTE value section.

Open the Authorised NTE value section.

The screenshot shows the 'JOB24954 - Details' panel. It contains various fields for job information. At the bottom, there is a section for 'Authorised NTE value' with a value of '£500.00 GBP'. A blue arrow points from this section to the 'Request an uplift' button located at the bottom right of the panel.

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

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, or initiating, 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*.

The screenshot shows the 'Quote Manager' interface. On the left is a navigation menu with options: Portfolio, Surveys, Task Management, Service Providers, Compliance, Quote, and Quote Manager (selected). The main area displays a table of RFQs:

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

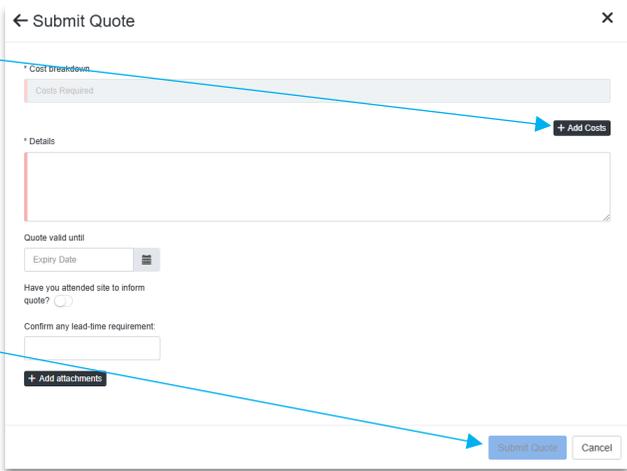
**F4** Review the information and click *Submit Quote* (or *Decline*).

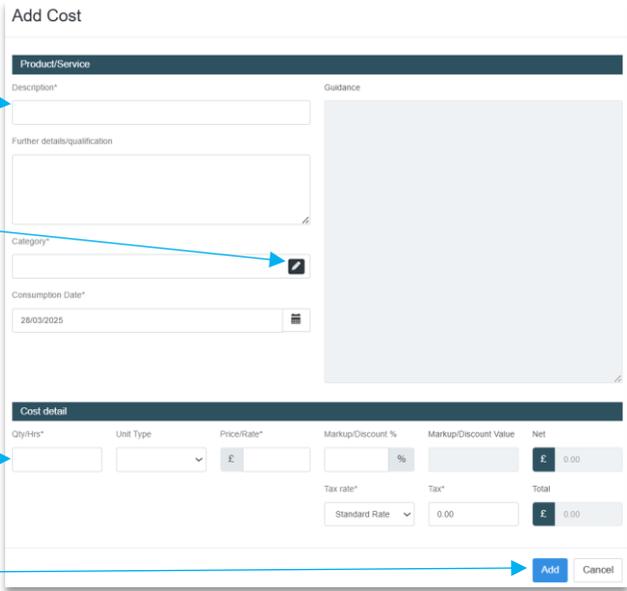
*Decline is followed by the opportunity to add a comment.*

The screenshot shows the 'Request For Quote (RFQ)' details page for RFQ697. The page includes a navigation menu on the left, a 'Details' section with the following information:

- Nature of quote:** Provision of Services / Works
- Classification:** General quote
- Description of Product / Services to be provided:** Toilet refurb
- Quote required by:** 21/02/2025
- Deadline for questions:** 07/03/2025
- Planned commencement for services / works:** 07/03/2025
- Planned completion date for services / works:** [blank]
- Requested By:** Mike Fish
- Locations:** F - North West Sector, F036 : Park Farm - Barn, 00 : Ground Floor

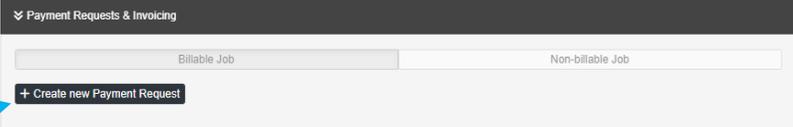
At the top right, there are buttons for 'Submit Quote' and 'Decline'. A timeline on the right shows two events: 'RFQ Status Changed' on 14 Feb 2025 and 'REQUEST CREATED' on 14 Feb 2025, both by Mike Fish.

<p><b>F5</b></p>	<p>Click <i>Add Costs</i> to give a breakdown. (See F5a-e below.)</p>	
<p><b>F6</b></p>	<p>Complete other details, and add attachments, if required.</p>	
<p><b>F7</b></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><b>F5a</b></p>	<p>After clicking <i>Add Costs</i> (F5) ...</p>	
<p><b>F5b</b></p>	<p>Add a <i>Description</i> and optional <i>Further Details</i>.</p>	
<p><b>F5c</b></p>	<p>Click to add a cost <i>Category</i>.</p> <p><i>At least one is required but any amount can be added.</i></p>	
<p><b>F5d</b></p>	<p>Select a <i>quantity, unit type</i> and <i>price/rate</i> per unit.</p>	
<p><b>F5d</b></p>	<p>Click <i>Add</i> (repeat if nec.)</p>	

**Task G: Submitting a Payment Request**

<p><b>G1</b> 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><b>G2</b> Click the pencil icon to update the assignment.</p>		
<p><b>G3</b> If no operative can be assigned, the Job can be marked as Complete by clicking the flag.</p>		
<p><b>G4</b> 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><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>	