Role: Service Provider Administrators

Task A: Navigating Invida   A: Video guide

Task B: Updating Service Provider details, inc. uploading documentation   B: Video guide

Task C: Accepting a Job & assigning Operatives   C: Video guide

Task D: Operatives' Invida Mobile app

Task E: Requesting an NTE Uplift   E: Video guide

Task F: Responding to, or initiating, a Request for Quote (RFQ)   F: Video guide

Task G: Submitting a Payment Request   G: Video guide
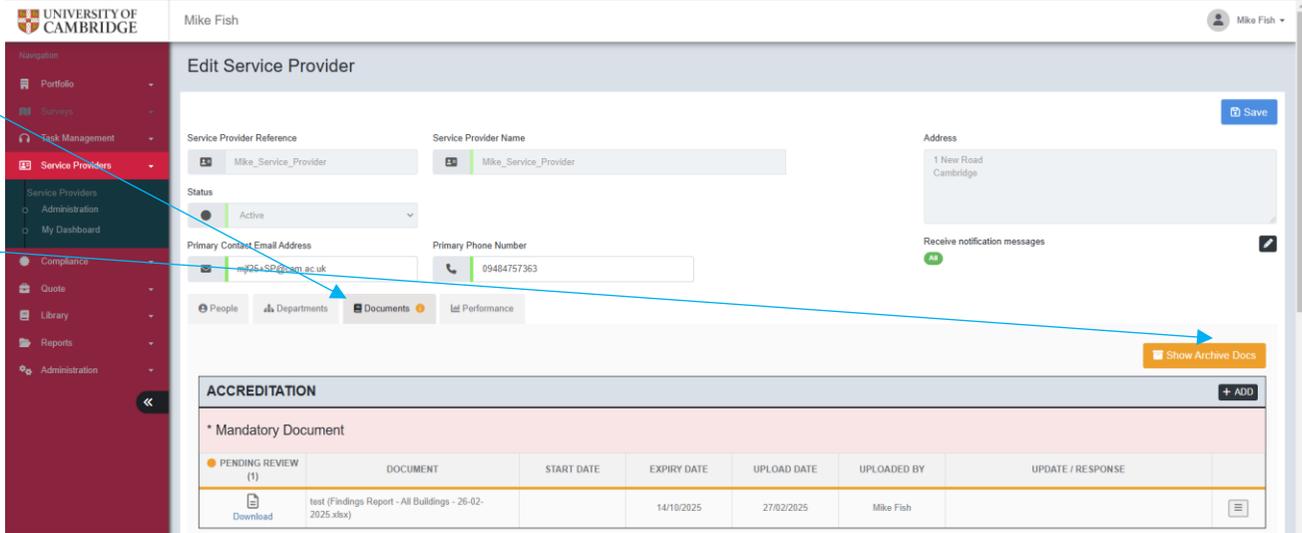
For support contact:

estates.invidasupport
@admin.cam.ac.uk

	Task A: Navigating Invida	
A1	Breadcrumb trail aids navigation.	
A2	Expand sections, such as *Task Management*, by clicking headings.	
A3	Show / hide map.	
A4	Expand and contract the navigation menu using the double arrow.	
A5	Open *Administration > My Profile, t*o set a startup page, change password and change notification settings.	

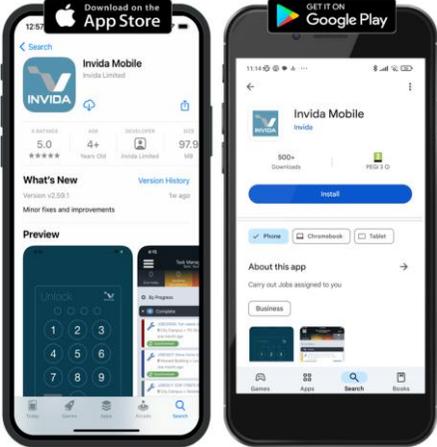## Task B: Updating Service Provider details, inc. uploading documentation

B1 Navigate to *Service Providers > Administration*.

B2 Ensure *Primary Contact Email Address* is appropriate to receive automated email notifications (click pencil to see these).

B3 Notifications can be sent to additional email addresses by adding contact details on the *Departments* tab.

B4 Edit *User* details, send password reset email or deactivate *User*.
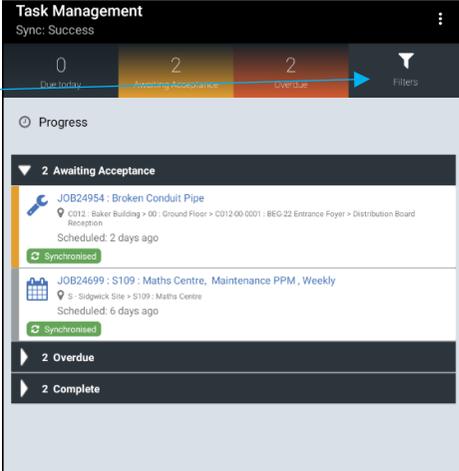
B5 Create new user.

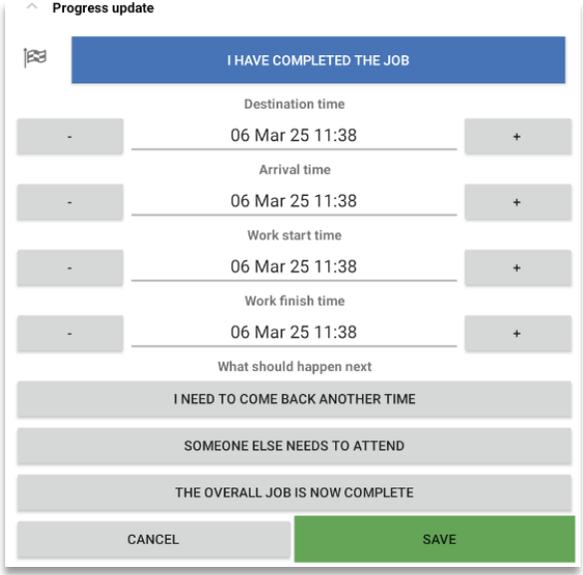|		
B6	To add Documentation, Click *Documents* tab.	
	Document requirements can be obtained from cow@admin.cam.ac.uk.	
B7	Click *+ADD* and complete required details.	
B8	Click *Save* regularly (after every few uploads).	
	Documents are reviewed and validated by a contract manager, who will report back any issues or further requirements.	

Task C: Accepting a Job & assigning Operatives

	When a Job is assigned to your company, an automated email notification will be sent to the address set in B2 above.	
C1	Follow the link in the email notification, or navigate to *Task Management > Job Manager > Job List*.	
C2	Click *Accept* and confirm.	
	If you need to Reject the Job, an explanatory comment can be added.	
C3	To assign an operative, click *Focus* to open *Team Diary*.	
C4	Click a day or time next to the operative's name …	
	or, to assign without giving a day or time, …	
	Drag from the blue-highlighted job to the box next to an operative's name.	
	The box will turn orange.	
C5	Click *Save changes*.	
	This will send a notification to the operative's Invida Mobile App.	

Task D: Operatives' Invida Mobile app

D1	Download the free Invida Mobile app from the device's Apple or Android Store.	
D2	See B5 above to set up an operative user account.	
D3	Open the app and use the Customer Code: UOC. *See* Task G *for how to complete a Job via a browser, if not possible by app.*	
D4	The app organises Jobs into sections. This view can be altered using the *Filters* tile, to organise by: - Progress - Due date - Location - Job type	

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D5	Tap on a Job to open it.	
D6	The Job (& Ticket) info can be reviewed, including the name and contact details of the Requester.	
D7	Tap to accept the assignment.	
D8	Tap to agree to the PoWRA questions.	
D8	The *Job Report* section can be used at any point to add photos or notes, or to see existing notes.	
D9	Click on the asset (if present) to report its condition and add notes.	
D10	If relevant, *Scan Barcode /QR Code* can be used.	

D11	Tap, following completion of PoWRA, so that attendance on site is known.	
D12	Tap, when assignment is complete. *The following screen will open.*	
D13	Any previous timings can be changed.	
D14	Select one of the three options, depending on whether a further visit is required.	
D15	Add a concluding comment and tap *Save*.	

| **D16** | If, back on the homescreen, the Job is not badged with green *Synchronised*, tap the dots (top-right - Android) or lines (top-left - iPhone) and then *Sync*.

When all assignments on a Job are Complete, the Job will also be marked as Complete. | |

Task E: Requesting an NTE Uplift
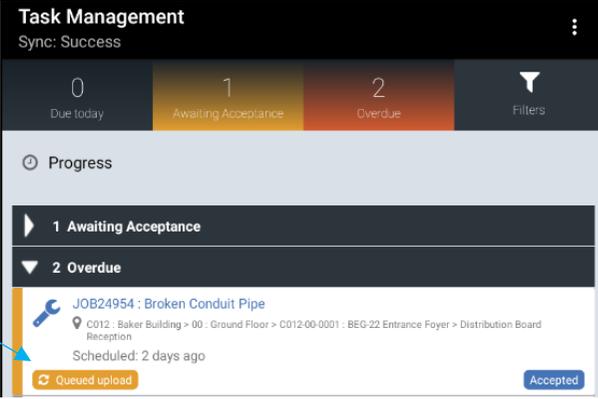
E1	*Reactive Jobs, created from a Service Ticket, have a default* Not To Exceed value *of £500. This value can be increased by requesting an* NTE Uplift. Click on the Job to open its panel, then on *Edit*.	
E2 **E3**	Open the Authorised NTE value section. Click *Request an uplift*.	

E4	Click the *Add Cost* buttons to include the full NTE value required (including costs within the default £500).
E5	When total costs are added and any *Supporting information* has been included, click *Issue Request*.
E6	If the request is urgent, please contact efhelpdesk@admin.cam.ac.uk to ensure it is approved quickly.
	Once approved, a notification will indicate the increased NTE value. All NTE Uplift Requests can be seen by navigating to Task Management > Job Manager > Job NTE Uplift Requests.

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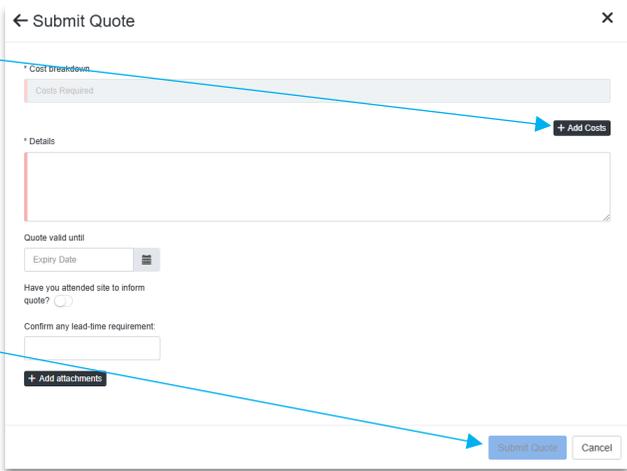| **F4** | Review the information and click *Submit Quote* (or *Decline*).

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

F5	Click *Add Costs* to give a breakdown. *(See F5a-e below.)*	
F6	Complete other details, and add attachments, if required.	
F7	Click *Submit Quote*.	
	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.	

	After clicking Add Costs *(F5)* ...	
F5a	Add a *Description* and optional *Further Details*.	
F5b	Click to add a cost *Category*. *At least one is required but any amount can be added.*	
F5c	Select a *quantity*, *unit type* and *price/rate* per unit.	
F5d	Click Add *(repeat if nec.)*	
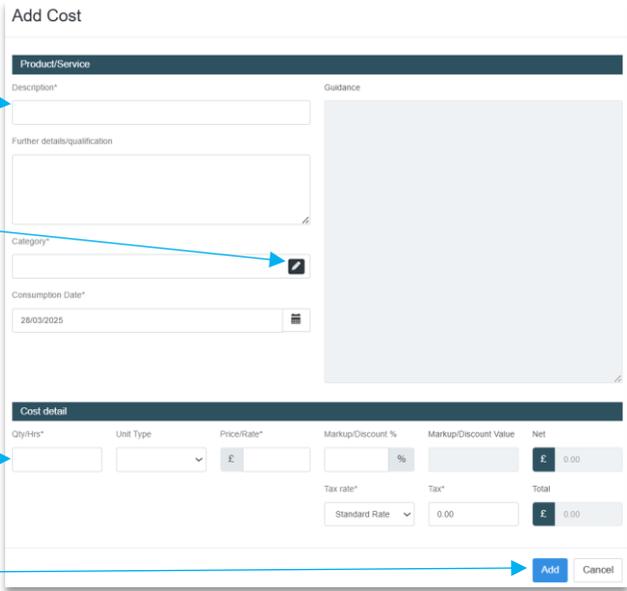
Task G: Submitting a Payment Request

G1   A Job has to be marked as *Complete* 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 *Edit* window and *Assignment* section.

G2   Click the pencil icon to update the assignment.

G3   If no operative can be assigned, the Job can be marked as Complete by clicking the flag.

G4   Before submitting a payment request, open the *Attachments* section to upload a job report (or similar, as well as relevant photos).
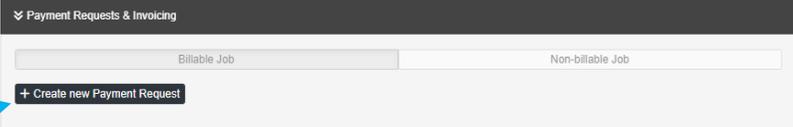
G5	When ready to make a payment request, open the *Payment Requests & Invoicing* section. Click *Create new Payment Request*.	
G6	Attach an Invoice.	
G7	Add a reference which matches the Invoice, a date of issue and a due date 30 days hence.	
G8	Multiple Job numbers can be added.	
G9	Issues (red) prevent submission; whereas warnings (amber) are just for information.	
G10	Click on the Job to expand the info below, relating to any issues & warnings.	
G11	Click *Submit Payment Request* (or *Save as Draft*) at the bottom of the window.	