

Role: Service Provider Administrators

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For support contact:

estates.invidasupport

@admin.cam.ac.uk

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

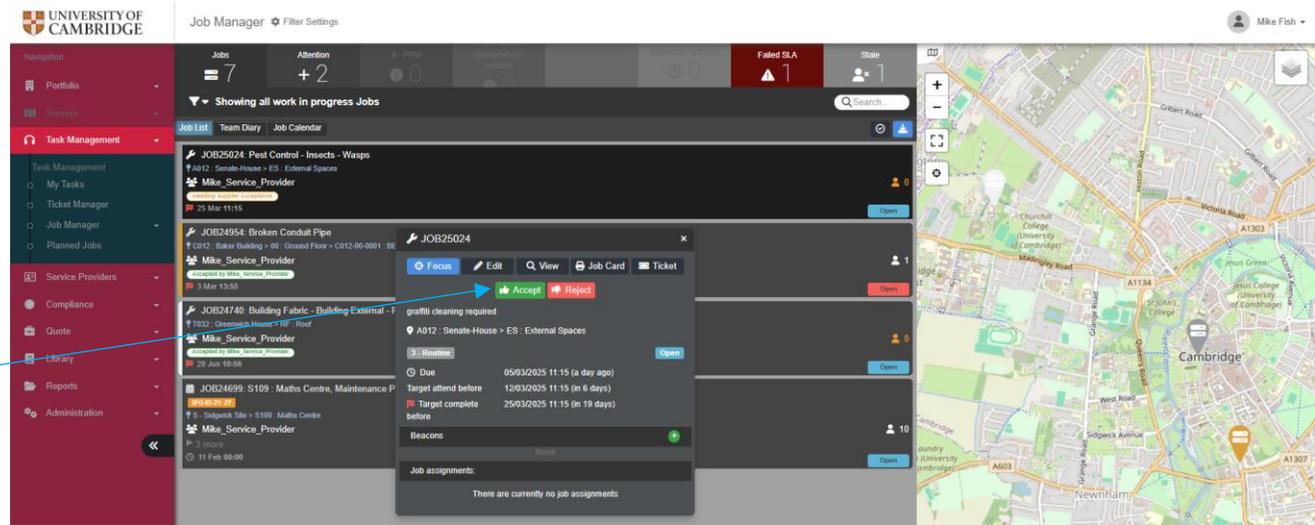
Task B: Updating Service Provider details, inc. uploading documentation

| | |
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| <p>B1 Navigate to <i>Service Providers</i> > <i>Administration</i>.</p> | |
| <p>B2 Ensure <i>Primary Contact Email Address</i> is appropriate to receive automated email notifications (click pencil to see these).</p> | |
| <p>B3 Notifications can be sent to additional email addresses by adding contact details on the <i>Departments</i> tab.</p> | |
| <p>B4 Edit <i>User</i> details, send password reset email or deactivate <i>User</i>.</p> | |
| <p>B5 Create new user.</p> | |

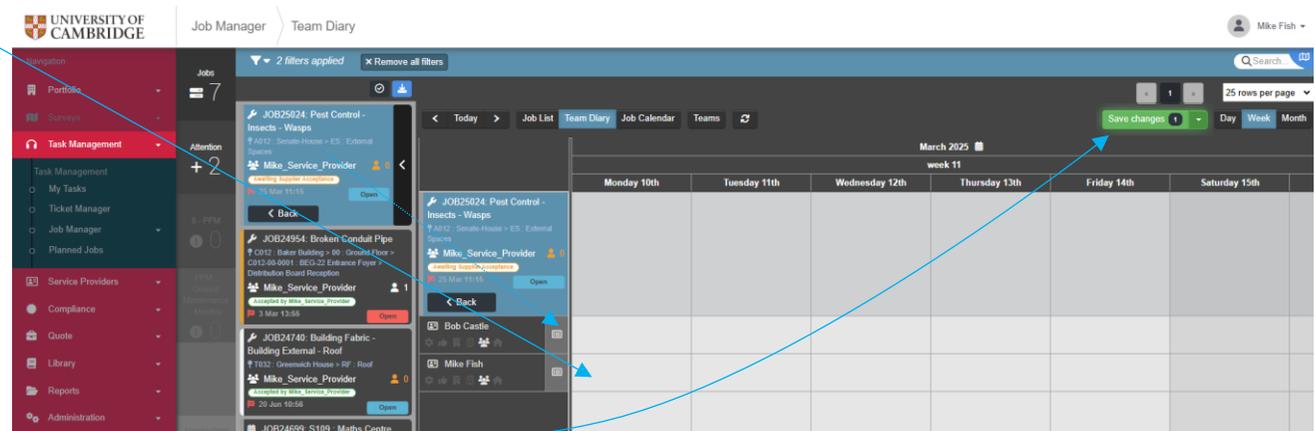
| <p>B6</p> <p>To add Documentation, Click <i>Documents</i> tab.</p> <p>See Appendix 1 for a list of required documents, plus link to staff induction. Please direct queries regarding these to Control of Works: cow@admin.cam.ac.uk.</p> <p>B7</p> <p>Click +ADD and complete required details.</p> <p>B8</p> <p>Click Save 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> | | <p>The screenshot shows the 'Edit Service Provider' interface. The 'Documents' tab is selected, and a blue arrow points to the '+ ADD' button in the 'ACCREDITATION' section. The table below shows a document titled 'test (Findings Report - All Buildings - 26-02-2025.xlsx)' with a status of 'PENDING REVIEW (1)'. The table columns are: DOCUMENT, START DATE, EXPIRY DATE, UPLOAD DATE, UPLOADED BY, and UPDATE / RESPONSE.</p> <table border="1"> <thead> <tr> <th>DOCUMENT</th> <th>START DATE</th> <th>EXPIRY DATE</th> <th>UPLOAD DATE</th> <th>UPLOADED BY</th> <th>UPDATE / RESPONSE</th> </tr> </thead> <tbody> <tr> <td>test (Findings Report - All Buildings - 26-02-2025.xlsx)</td> <td></td> <td>14/10/2025</td> <td>27/02/2025</td> <td>Mike Fish</td> <td></td> </tr> </tbody> </table> | DOCUMENT | START DATE | EXPIRY DATE | UPLOAD DATE | UPLOADED BY | UPDATE / RESPONSE | test (Findings Report - All Buildings - 26-02-2025.xlsx) | | 14/10/2025 | 27/02/2025 | Mike Fish | |
|---|------------|---|-------------|-------------|-------------------|-------------|-------------|-------------------|--|--|------------|------------|-----------|--|
| DOCUMENT | START DATE | EXPIRY DATE | UPLOAD DATE | UPLOADED BY | UPDATE / RESPONSE | | | | | | | | | |
| test (Findings Report - All Buildings - 26-02-2025.xlsx) | | 14/10/2025 | 27/02/2025 | Mike Fish | | | | | | | | | | |

Task C: Accepting a Job & assigning Operatives

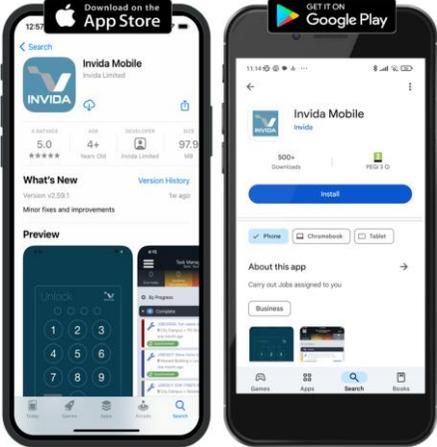
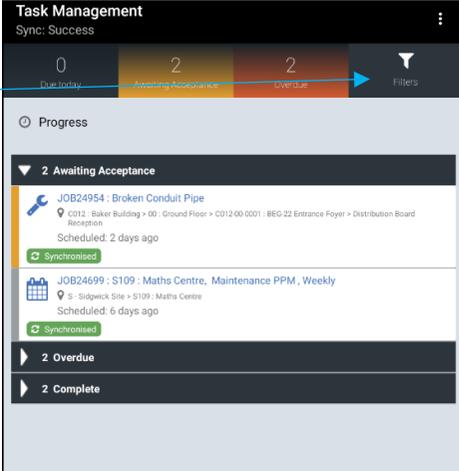
- C1** Follow the link in the email notification, or navigate to **Task Management > Job Manager > Job List**.
- C2** Click **Accept** and confirm.
If you need to Reject the Job, an explanatory comment can be added.
- C3** To assign an operative, click **Focus** to open **Team Diary**.



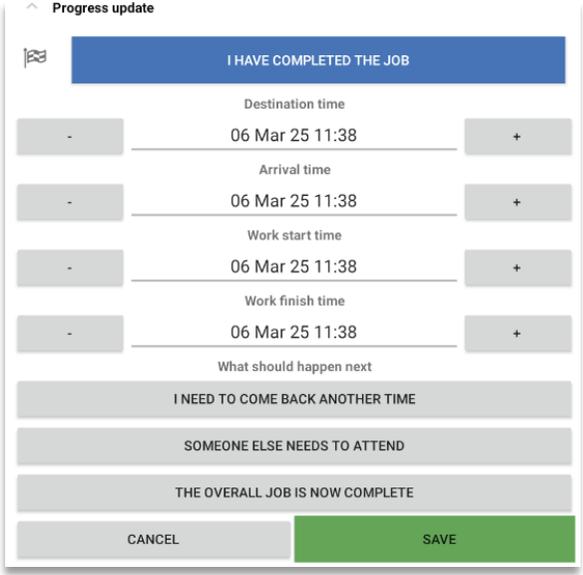
- C4** Click a day or time next to the operative's name ...
or, to assign without giving a day or time, ...
- Drag from the blue-highlighted job to the box next to an operative's name.
The box will turn orange.
- C5** Click **Save changes**.
This will send a notification to the operative's Invida Mobile App.

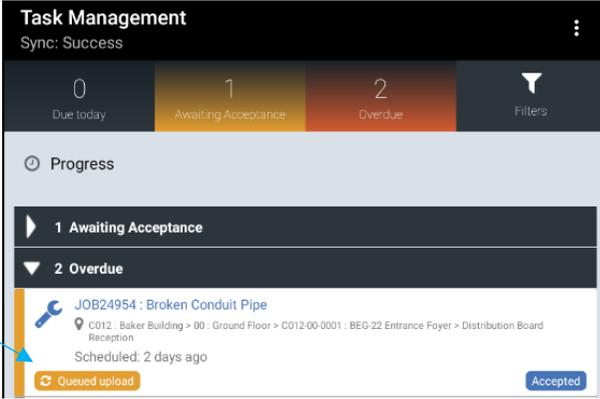


Task D: Operatives' Invida Mobile app

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| <p>D1</p> <p>D2</p> <p>D3</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> |  |
| <p>D4</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"> - Progress - Due date - Location - Job type |  |

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| <p>D5</p> <p>D6</p> <p>D7</p> <p>D8</p> | <p>Tap on a Job to open it.</p> <p>The Job (& 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>D8</p> <p>D9</p> <p>D10</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> | |

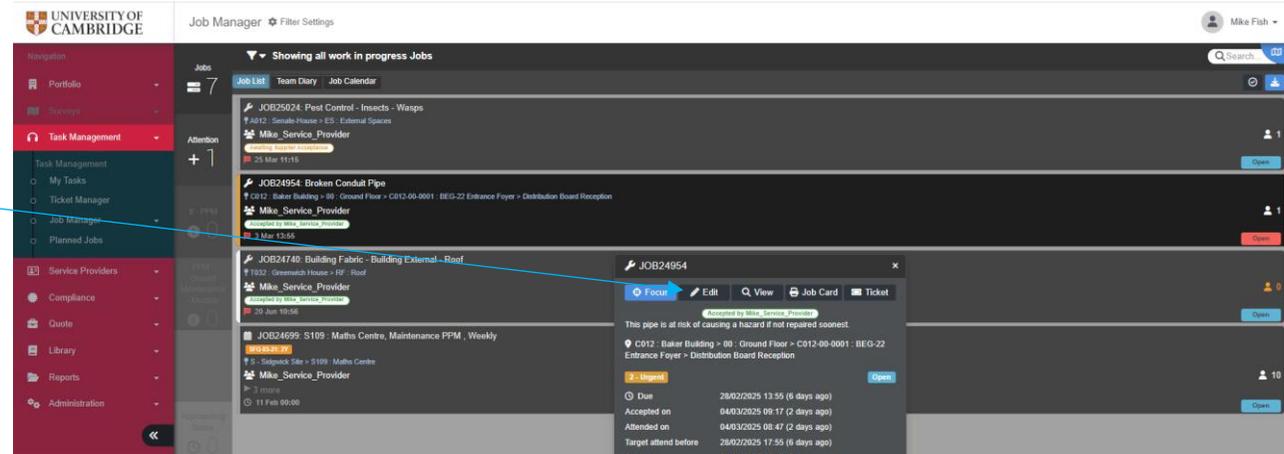
| | | |
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| <p>D11</p> <p>D12</p> | <p>Tap, following completion of PoWRA, so that attendance on site is known.</p> <p>Tap, when assignment is complete.</p> <p><i>The following screen will open.</i></p> |  |
| <p>D13</p> <p>D14</p> <p>D15</p> | <p>Any 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> |  |

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| <p>D16</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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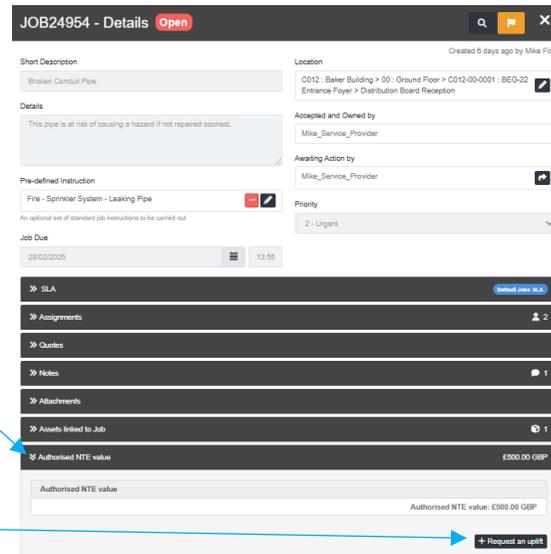
Task E: Requesting an NTE Uplift

E1 Click on the Job to open its panel, then on *Edit*.

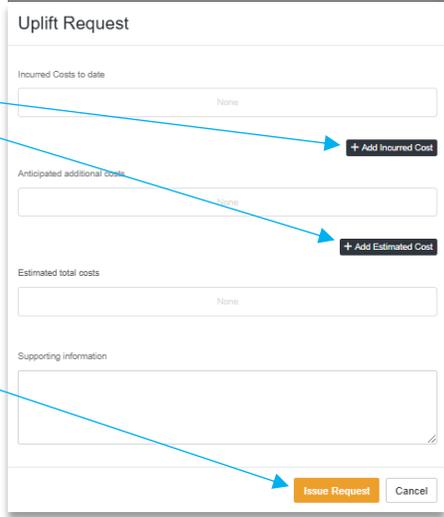
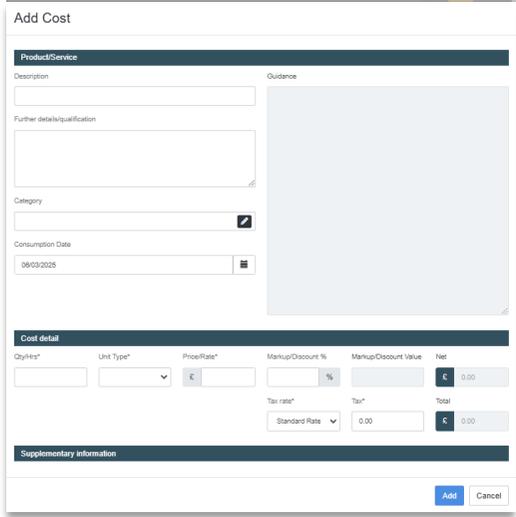
Reactive Jobs, created from a Service Ticket, have a default Not To Exceed value of £500. This value can be increased by requesting an NTE Uplift.



E2 Open the Authorised NTE value section.



E3 Click *Request an uplift*.

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| <p>E4 Click the <i>Add Cost</i> buttons to include the full NTE value required (including costs within the default £500).</p> <p>E5 When total costs are added and any <i>Supporting information</i> has been included, click <i>Issue Request</i>.</p> <p>E6 If the request is urgent, please contact efhelpdesk@admin.cam.ac.uk 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 > Job Manager > Job NTE Uplift Requests.</i></p> | |   |
|---|--|--|

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 with columns: Reference, Short Description, Locations, Requested By, RFQ Issued Date, Quote Required By, and Status.

| Reference | Short Description | Locations | Requested By | RFQ Issued Date | Quote Required By | Status |
|---------------------|------------------------------------|--|----------------------|------------------|-------------------|----------|
| RFQ Open | | | | | | |
| RFQ535 | Install new PRVs on all 5 chillers | E - Old Addenbrookes > E041: Wellcome/CRIUK Gordon Institute | | 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 |
| RFQ Complete | | | | | | |
| 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 | | 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.

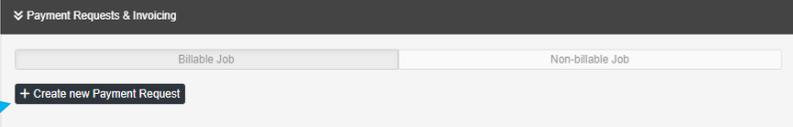
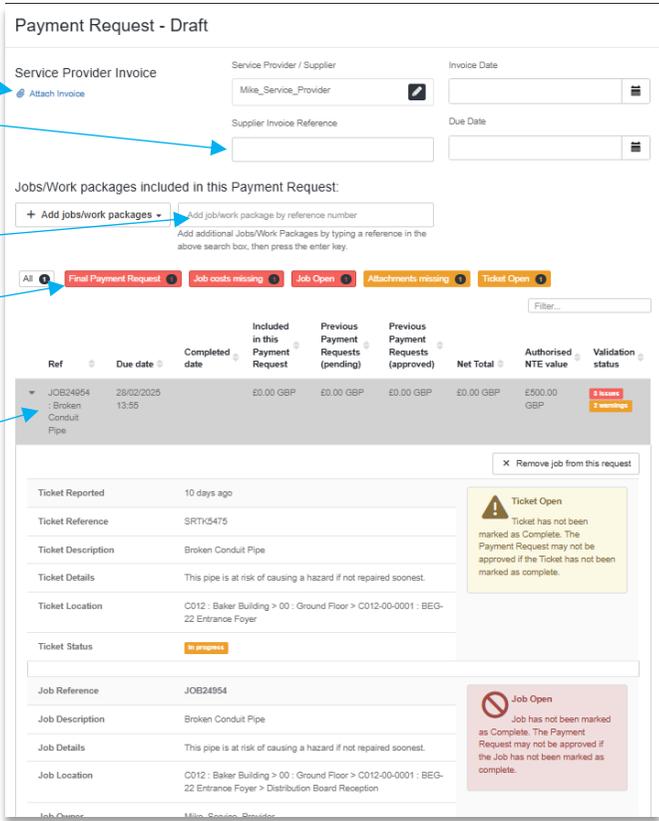
The screenshot shows the 'Request For Quote (RFQ)' details page for RFQ697. The page is divided into sections: Details, Classification, Quote required by, Deadline for questions, Planned commencement for services / works, Planned completion date for services / works, People, and Locations. A 'Submit Quote' button is visible at the top right. A timeline on the right shows events: 'RFQ Status Changed' on 14 Feb 2025 and 'REQUEST CREATED' on 14 Feb 2025, both by Mike Fish.

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

| | | |
|-----------------------------------|---|--|
| After clicking Add Costs (F5) ... | | |
| F5a | Add a <i>Description</i> and optional <i>Further Details</i> . | |
| F5b | Click to add a cost <i>Category</i> . <i>At least one is required but any amount can be added.</i> | |
| F5c | Select a <i>quantity, unit type</i> and <i>price/rate</i> per unit. | |
| F5d | Click <i>Add</i> (repeat if nec.) | |

Task G: Submitting a Payment Request

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| <p>G1</p> <p>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>The screenshot shows the 'JOB25024 - Details' window. It includes fields for Short Description (Pest Control - Insects - Wasps), Location (A012 : Senate-House > ES : External Spaces), Details (graffiti cleaning required), Team (Mike_Service_Provider), Priority (3 - Routine), and Job Due (05/03/2025 11:15). The 'Assignments' section is expanded, showing 'Bob Castle - Scheduled' with a pencil icon for editing. A blue arrow points from the 'G2' instruction to this pencil icon.</p> |
| <p>G2</p> <p>Click the pencil icon to update the assignment.</p> | | <p>The screenshot shows the 'Attachments' section with a large empty box for uploading files and a blue 'Add attachment' button at the bottom. A blue arrow points from the 'G4' instruction to this button.</p> |
| <p>G3</p> <p>If no operative can be assigned, the Job can be marked as Complete by clicking the flag.</p> | | <p>The screenshot shows the 'JOB25024 - Details' window with a red flag icon next to the 'Pre-defined Instruction' field. A blue arrow points from the 'G3' instruction to this flag icon.</p> |
| <p>G4</p> <p>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>The screenshot shows the 'Attachments' section with a large empty box for uploading files and a blue 'Add attachment' button at the bottom. A blue arrow points from the 'G4' instruction to this button.</p> |

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| <p>G5</p> | <p>When ready to make a payment request, open the <i>Payment Requests & Invoicing</i> section.</p> <p>Click <i>Create new Payment Request</i>.</p> |  |
| <p>G6</p> <p>G7</p> <p>G8</p> <p>G9</p> <p>G10</p> <p>G11</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 & warnings.</p> <p>Click <i>Submit Payment Request</i> (or <i>Save as Draft</i>) at the bottom of the window.</p> |  |

Appendix 1:

Mandatory Compliance Requirements to be uploaded to Invida (See B6 above)

1. **Valid Insurances** (Upload under: Insurances)

All current insurances must be uploaded, even if already provided to procurement.

Required:

- Public Liability
- Employer's Liability
- Professional Indemnity
- (If applicable) Property and Business Interruption

2. **Subcontractor Policy** (Upload under: Contracts)

Provide your current subcontractor policy.

Note: If subcontractors are used, they must also be registered with appropriate competencies and UoC induction completion.

3. **Accreditation** (Upload under: Accreditation)

- Constructionline Gold is preferred, or;
- A valid SSIP certificate, or;
- Additional documents such as ISO certificates or relevant memberships are welcome but not accepted as a count to satisfy this requirement

4. **Engineer/Operator Competencies** (Upload under: Competencies)

Only upload certificates of trade qualifications.

- Do not upload matrixes or self-declarations – they will be declined.
- Use this naming format: Name of Engineer – Name of Qualification
- If an engineer has multiple certificates, upload them as a .zip folder per engineer.

5. **Generic RAMS** (Upload under: Generic RAMs)

Provide Risk Assessments and Method Statements relevant to the services provided – templates with generic information will be rejected. These will be reviewed annually.

- Naming Format: Task – Date Issued/Reviewed Page 3 of 3
- These must have the location of works as the University of Cambridge & Dated Within a Year
- For *reactive works*, you may submit examples of common task RAMS if suitable.

It is recommended that both the Method Statement (MS) & Risk Assessment (RA) are compiled into one file; otherwise, the MS must reference each relevant RA if attached separately.

6. UoC Induction

All engineers/operatives must complete the University of Cambridge induction during the onboarding process.

- Complete via this link or QR code: [UoC Induction Form](#)
- Annual renewal is required – the renewal deadline is January 1st each year.

