

Role: Service Provider Administrators

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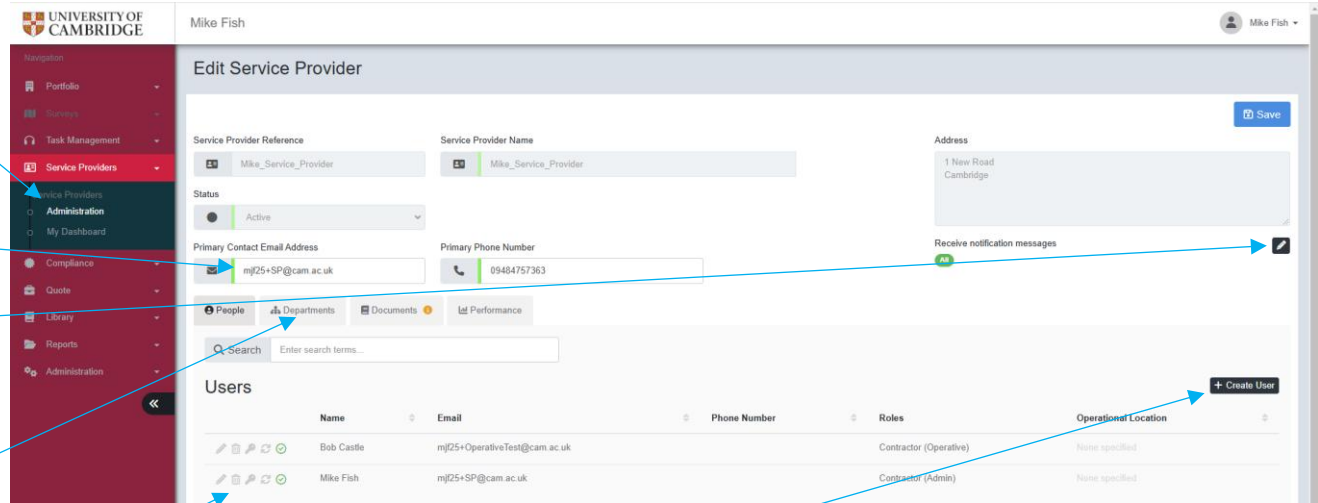
For support contact:

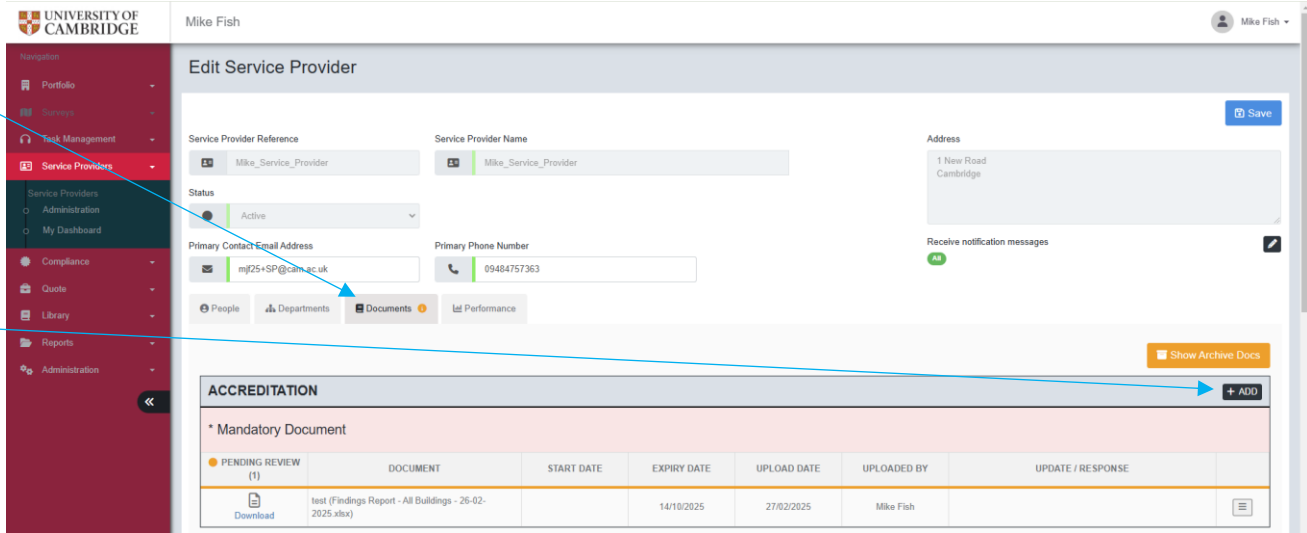
estates.invidasupport

@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

<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 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 Click +ADD and complete required details.</p> <p>B8 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 for Mike Fish. The 'Documents' tab is selected, and a table of accreditation documents is displayed. A blue arrow points from the 'Documents' tab in the instructions to the 'Documents' tab in the interface. Another blue arrow points from the '+ ADD' button in the table to the corresponding instruction B7.</p> <table border="1"> <thead> <tr> <th colspan="8">ACCREDITATION</th> </tr> <tr> <th colspan="8">* Mandatory Document</th> </tr> <tr> <th>PENDING REVIEW (1)</th> <th>DOCUMENT</th> <th>START DATE</th> <th>EXPIRY DATE</th> <th>UPLOAD DATE</th> <th>UPLOADED BY</th> <th colspan="2">UPDATE / RESPONSE</th> </tr> </thead> <tbody> <tr> <td>Download</td> <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 colspan="2"></td> </tr> </tbody> </table>	ACCREDITATION								* Mandatory Document								PENDING REVIEW (1)	DOCUMENT	START DATE	EXPIRY DATE	UPLOAD DATE	UPLOADED BY	UPDATE / RESPONSE		Download	test (Findings Report - All Buildings - 26-02-2025.xlsx)		14/10/2025	27/02/2025	Mike Fish		
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Task C: Accepting a Job & assigning Operatives


<p>C1 Follow the link in the email notification, or navigate to Task Management > Job Manager > Job List.</p> <p>C2 Click Accept and confirm. <i>If you need to Reject the Job, an explanatory comment can be added.</i></p> <p>C3 To assign an operative, click Focus to open Team Diary.</p>	
<p>C4 Click the day/date of the visit to see time-blocks. <i>This may need to be arranged with the relevant building manager outside of Invida.</i></p> <p>C5 In the row next to the operative's name, drag from start to finish of planned visit time.</p> <p>C6 Repeat for any additional visits/operatives.</p> <p>C7 Click Save changes. <i>This will send a notification to the operative's Invida Mobile App.</i></p>	

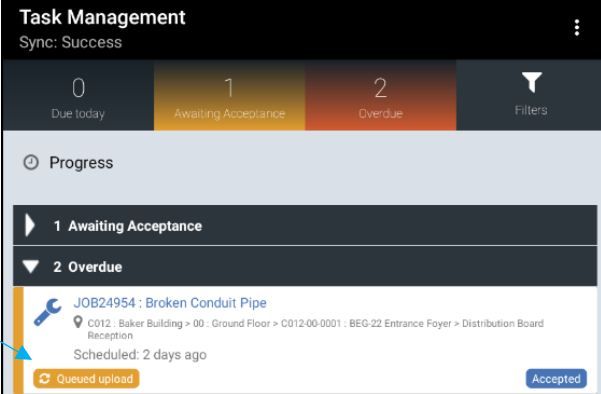
Task D: Operatives' Invida Mobile app

<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>	
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<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>	

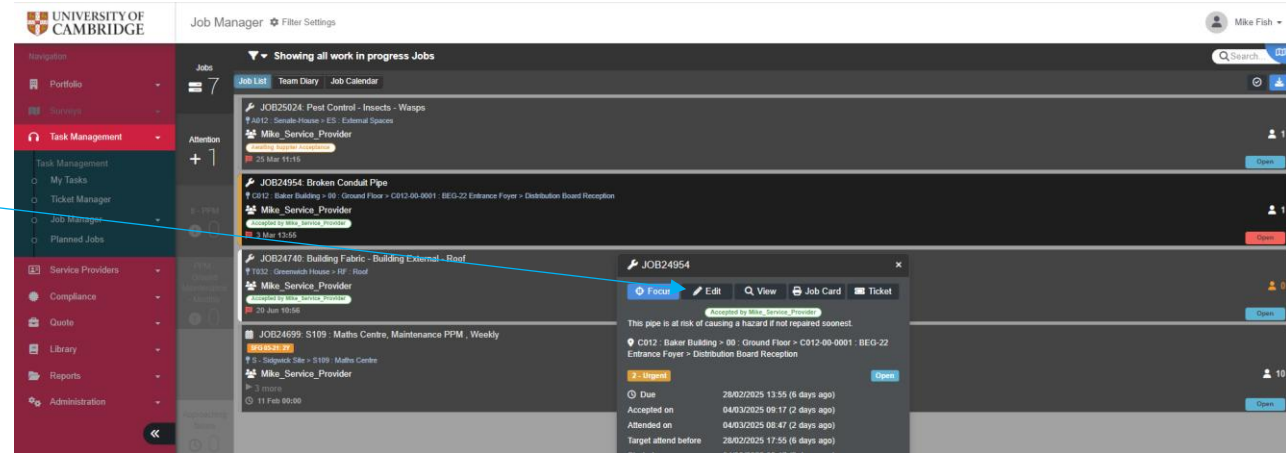
<p>D11</p> <p>D12</p>	<p>Tap, following completion of PoWRA, so that attendance on site is known.</p> <p>Tap, when assignment is complete.</p> <p><i>The following screen will open.</i></p>	
<p>D13</p> <p>D14</p> <p>D15</p>	<p>Any previous timings can be changed.</p> <p>Select one of the three options,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

<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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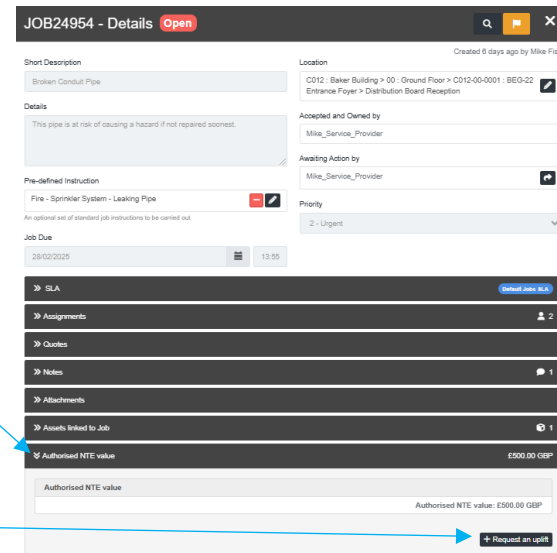
Task E: Requesting an NTE Uplift

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

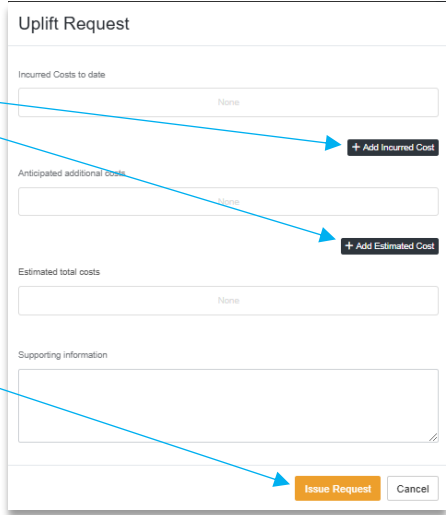
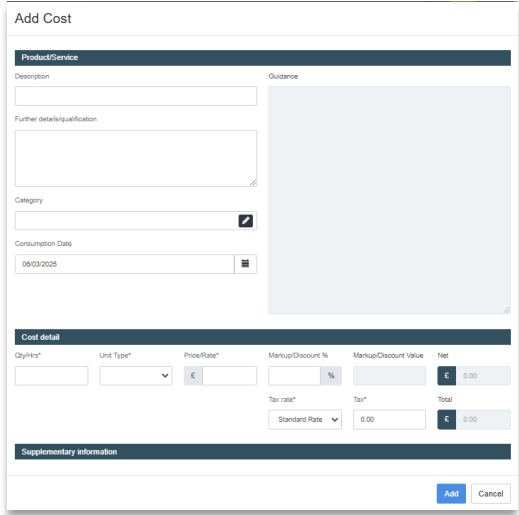
Reactive Jobs, created from a Service Ticket, have a default Not To Exceed value of £500. This value can be increased by requesting an NTE Uplift.



E2 Open the Authorised NTE value section.



E3 Click *Request an uplift*.

<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>		 
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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
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 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:** Completion date

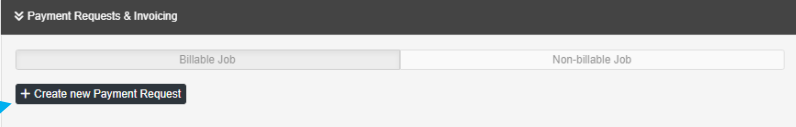
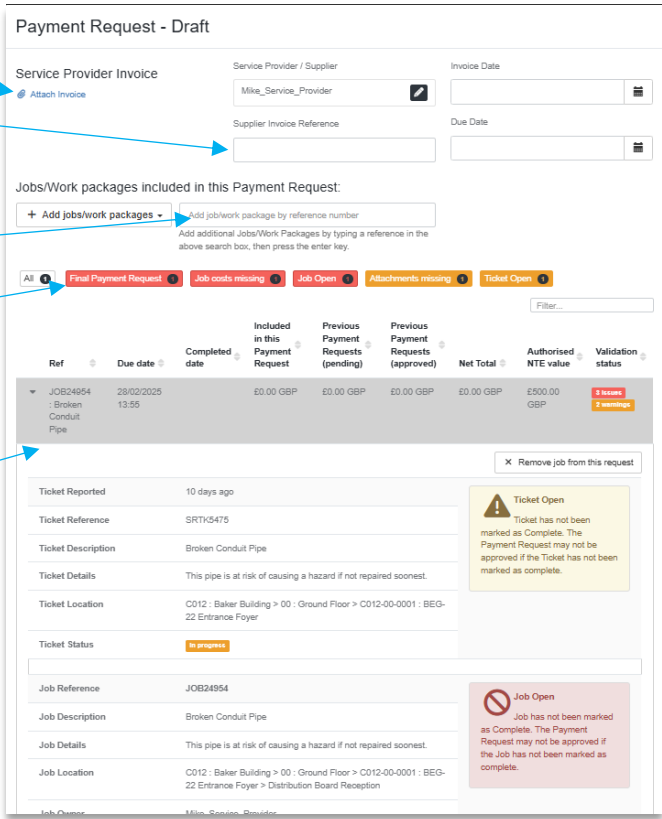
At the bottom, it shows 'Requested By: Mike Fish' and 'Locations: F - North West Sector, F036 : Park Farm - Barn, 00 : Ground Floor'. On the right, a 'Timeline' shows events: 'RFQ Status Changed' on 14 Feb and 'REQUEST CREATED' on 14 Feb. At the top right, there are 'Submit Quote' and 'Decline' buttons.

<p>F5</p>	<p>Click <i>Add Costs</i> to give a breakdown. (See F5a-e below.)</p>	
<p>F6</p>	<p>Complete other details, and add attachments, if required.</p>	
<p>F7</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>After clicking Add Costs (F5) ...</p>		
<p>F5a</p>	<p>Add a <i>Description</i> and optional <i>Further Details</i>.</p>	
<p>F5b</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>F5c</p>	<p>Select a <i>quantity, unit type</i> and <i>price/rate</i> per unit.</p>	
<p>F5d</p>	<p>Click <i>Add</i> (repeat if nec.)</p>	

Task G: Submitting a Payment Request

<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>G2</p> <p>Click the pencil icon to update the assignment.</p>		
<p>G3</p> <p>If no operative can be assigned, the Job can be marked as Complete by clicking the flag.</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>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>Note: The 'Create new Payment Request' button can also be found on the Payment Request page.</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. See G12 for more info.</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>	

<p>G12</p>	<p>Including multiple Jobs on one PAR: Please submit as applicable each month:</p>	<ul style="list-style-type: none"> • One PAR, with one invoice attached, covering all PPM Jobs • One PAR, with one invoice attached, covering all reactive Jobs • One PAR, with one invoice attached, covering all remedial follow-on Jobs • One PAR, with one invoice attached, covering works relating to an individual project.
<p>G13 G14 G15 G16 G17</p>	<p>To add jobs one at a time, start entering a Job ref until the required one appears. Click on the Job required to add it to the PAR. Repeat for as many Jobs as are required. To copy and paste multiple Job refs in one go, click and select: <i>Add multiple reference numbers</i>, then copy or type in. To upload via Excel, select: <i>Bulk import from Excel template</i> then download and complete from the link presented.</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.

