Role: Supplier Admin **Task**: Completing a PPM or Compliance Inspection Job

A. Accessing pre-planned Jobs B. Assigning operatives C. Adding PPM Findings D. Updating Compliance schedule E. Payment Request

A. Accessing pre-planned Jobs

Email notifications for Pre-planned Jobs are scheduled 30 days in advance of when they are due.

A1 Navigate to *Task Management* > *Job Manager* > *Job List*.

By default, only Jobs having reached their Due date will be listed.

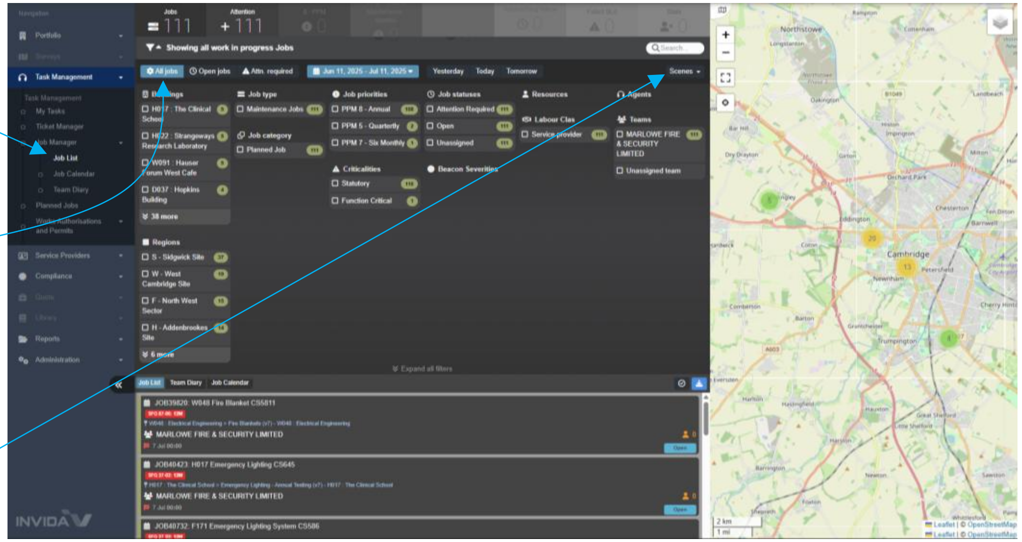
A2 To see Jobs scheduled up to 30 days in advance, click to open Filters, then select ‘All jobs’, plus a suitable date range.

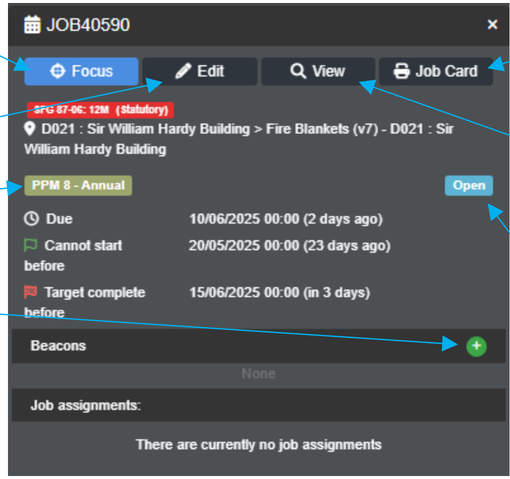
Jobs scheduled beyond 30 days can also be searched for, using a Job number found via *Task Management* > *Planned Jobs*.

Other filter settings, including dates, can also be changed here and views can be saved as ‘Scenes’ for future use.

A3 Click again to close the Filter settings.

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 .



A4	In *Job List*, click on a Job to open its *Job Panel*.	Focus: Link to *Team Diary* (see B1 below). Edit: Job interactions (see C1 below). SLA Add Beacon to flag a message for the helpdesk, inc. requesting an SLA break.  Job Card: Simplified view of details for printing or saving as pdf. View: Screen-friendly view of details, inc. timeline of actions taken. Job Status: *Scheduled* *Open* *Complete* or *Closed*
A5	Contact the relevant building manager, outside of Invida, to arrange visit times. *Building manager contact details can be obtained via the helpdesk:* [*efhelpdesk@admin.cam.ac.uk*](mailto:efhelpdesk@admin.cam.ac.uk) . *Building addresses and postcodes can be found in the Portfolio section of Invida.*	

B. Assigning operatives to Jobs

B1 In the *Job Panel*, click Focus to open *Team Diary*.

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.*

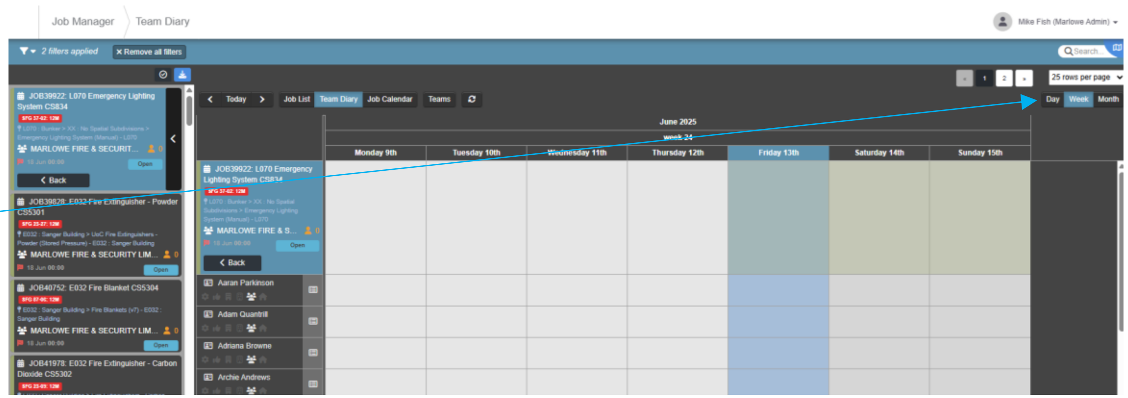
To assign to an arranged time on a particular day, click *Day* to display time slots.

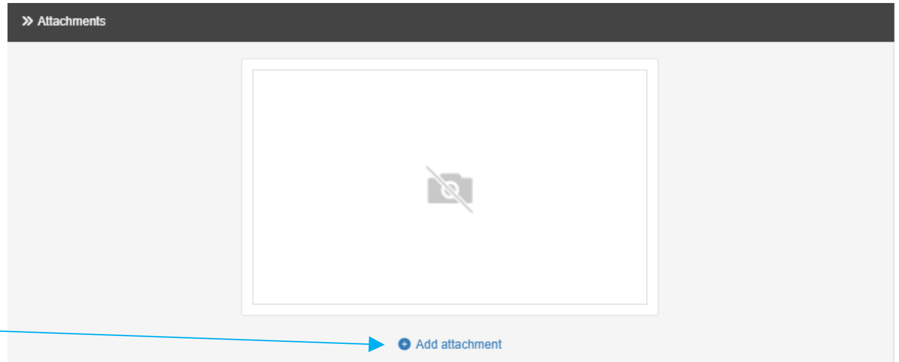
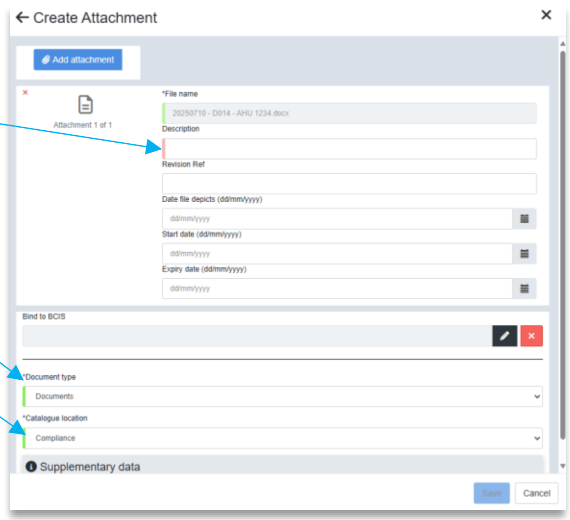
Click Save changes 1 to finish.

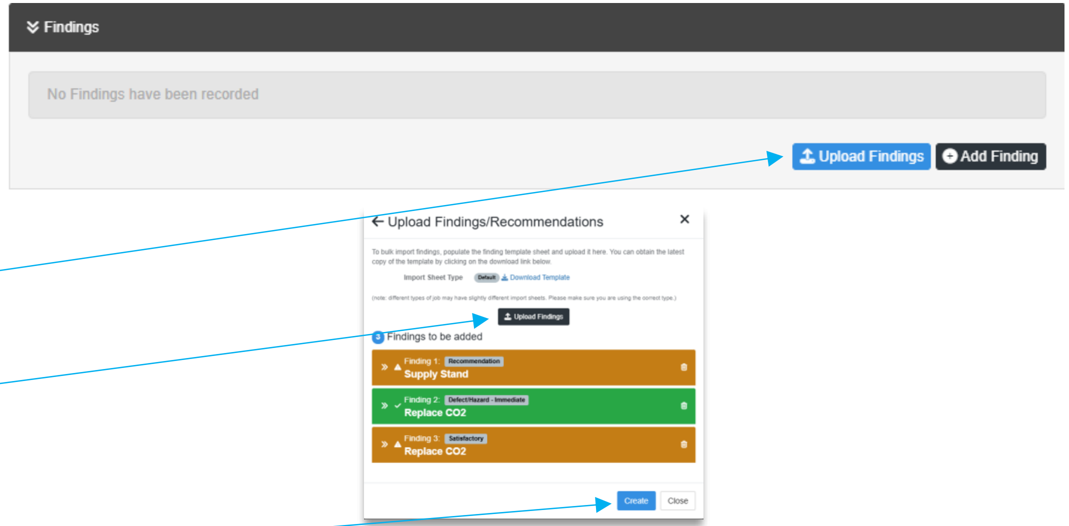
This will send a notification to the operative's mobile app. See guide: Mobile App – PPM Jobs.

B3 Click the list icon 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 the Service Provider section in the navigation bar.



C. Adding PPM findings (If any findings relate to Compliance Inspection, go to section D)		
	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.*	
C1	Click *Edit* in *Job Panel* to open the Edit window.	
C2	Open the *Attachments* section.	
C3	Upload a service sheet or job report.	
	Notes can also be added to the Job by opening the Notes *section. Notes submitted via the operative's mobile app also appear here.*	
C4	Add a short description for the uploaded file.	
C5	In *Document type*, select *PPM service report*.	
C6	In *Catalogue location*, select the appropriate PPM catalogue.	
C7	Click *Save* to close window.	

C8	Download and complete the relevant *Remedial Action Template* from: www.em.admin.cam.ac.uk/what-we-do/estate-operations/estate-maintenance/remedial-action-templates	
C9	If any Findings are likely to result in assets or systems being *non-compliant*, stop and continue at section D.	
C10	Click *Upload Findings*.	
C11	In the Upload window, click *Upload Findings* and browse to the completed template.	
C12	Review the *Findings to be added*.	
C13	Click *Create* to add the *Findings* to the Job.	

D. Updating Compliance Schedule

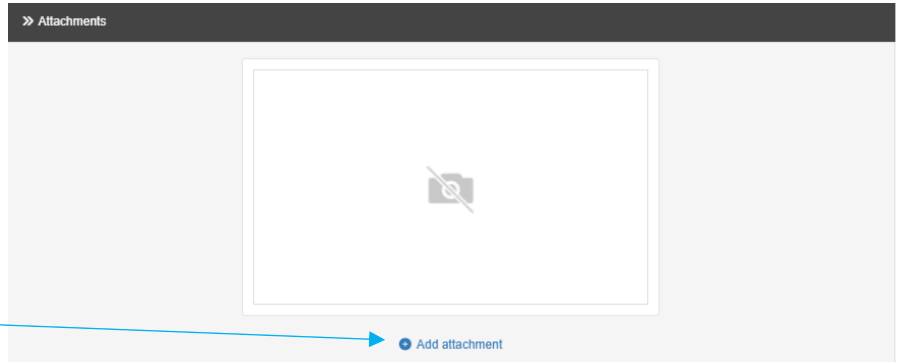
When all operatives assigned to a Job have completed their assignment, the Job status will change to Complete. If necessary, this can be done on their behalf via the Assignments *section of the Job Edit window.*

D1 Click *Edit* in *Job Panel* to open the Edit window.

D2 Open the *Attachments* section.

D3 Upload an inspection report or certificate as a PDF file (Not PDF image of document, or Word doc).

Notes can also be added to the Job by opening the Notes *section. Notes submitted via the operative's mobile app also appear here.*

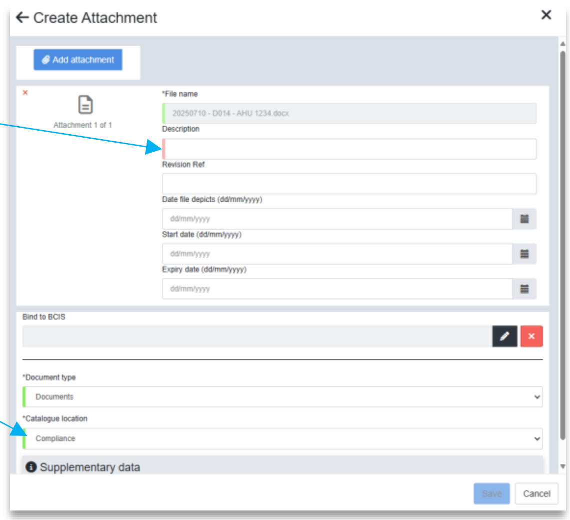


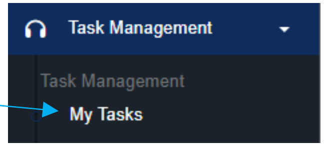
D4 Add a short description for the uploaded file.

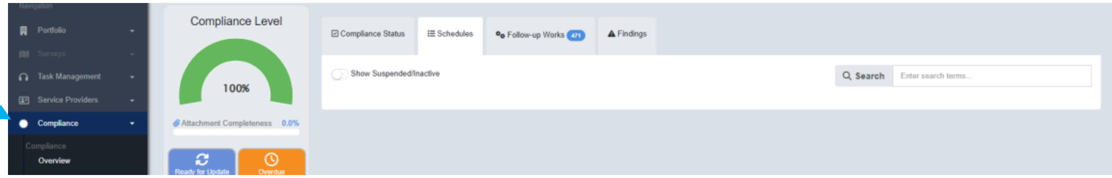
D5 In *Document type,* select *Certificates*.

D6 Click *Catalogue location* and select the most appropriate item beginning *Compliance >*.

D7 Click *Save* to close window and return to compliance record.



<table>
<tr>
<td>D8</td>
<td>Access the associated compliance schedule, either via an email notification, My Tasks, or the Schedules tab in Compliance > Overview.</td>
<td>


</td>
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<tr>
<td>D9

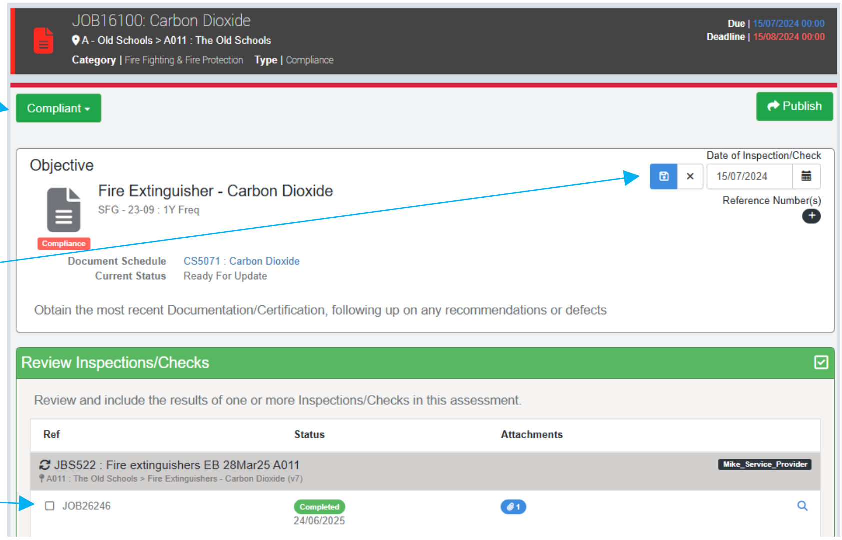
D10

D11

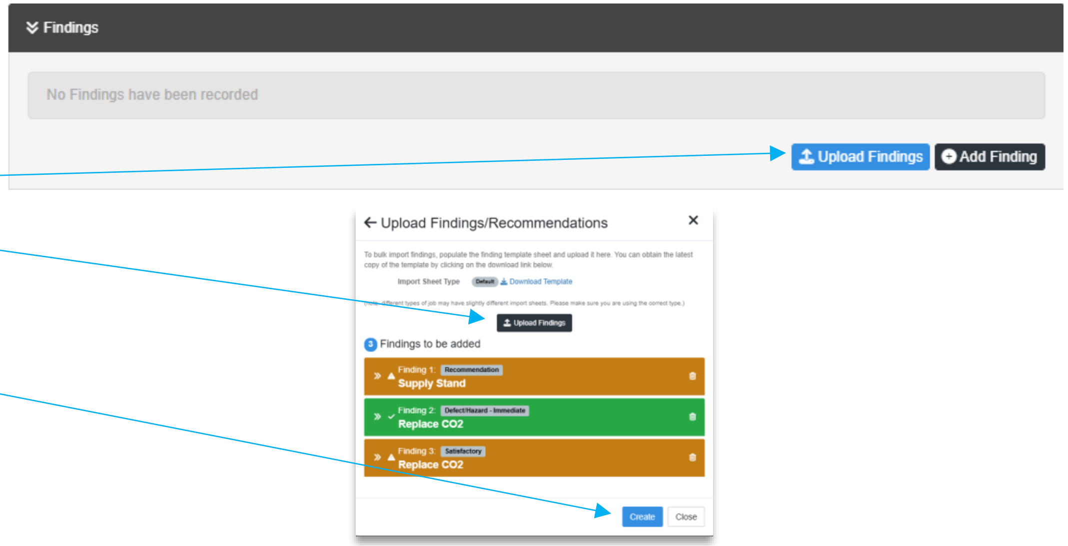
D12</td>
<td>If necessary, click Compliant ▾ and Change to Non-compliant

After giving a reason for the change, the schedule status will change to: Non-compliant ▾

Set the date of the inspection and click 🖫 to save.

Tick the previously completed Job, to automatically pull through the inspection report uploaded to it.</td>
<td>
</td>
</tr>
</table>

D13	Download and complete the relevant *Remedial Action Template* from: www.em.admin.cam.ac.uk/what-we-do/estate-operations/estate-maintenance/remedial-action-templates
D14	Click *Upload Findings*.
D15	In the Upload window, click *Upload Findings*.
D16	Review the *Findings to be added*.
D17	Click *Create* to add the *Findings* to the Schedule.
D18	Click **Publish for Review** to finish and send a notification to the relevant Estates team.



E. Submitting a Payment Request		
E1	A Payment Request and invoice can now be submitted from the Job Edit window. *See guide: Submit Payment Request.* *Note: Only one invoice can be submitted per job.* *If this is problematic, please contact your contract manager.*