

Role: All

Task A: [Explore](#)

Task B: [Space Manager](#)

Task C: [Asset Manager](#)

Task #: Hazards & Risks (not yet in use)

Task #: Legal Documents (not yet in use)

Task A: Explore

<p>A1 Navigate to <i>Portfolio > Explore</i>.</p> <p>A2 Select to search by Location, Element or both.</p> <p>A3 Find a location or asset by:</p> <ol style="list-style-type: none"> clicking on the list to go down a level. clicking on map pins. using the search box. <p><i>Return to higher levels by clicking in the breadcrumb trail that develops along the top of the page.</i></p> <p>A4 Click to Hide/Show the map.</p>		<p>The screenshot shows the 'Portfolio' page in the 'Explore' view. The navigation menu on the left includes 'Dashboard', 'Portfolio', 'Legal Documents', 'Space Manager', 'Asset Manager', 'Hazards & Risks', 'Surveys', 'Life Cycle', 'Task Management', 'Service Providers', 'Compliance', 'Quote', 'Library', 'Reports', and 'Administration'. The 'Portfolio' section is active, showing a search bar and filter options: 'By Location', 'By Location / Category', and 'By Element'. The main content area displays a table of assets:</p> <table border="1"> <thead> <tr> <th>Description</th> <th>H&S Issues</th> <th>Priority 1</th> <th>Priority 2</th> <th>Total Assets</th> <th>Total Systems</th> <th>Total Images</th> <th>Service Tickets</th> </tr> </thead> <tbody> <tr> <td>Administration</td> <td>0</td> <td>0</td> <td>0</td> <td>0</td> <td>0</td> <td>11</td> <td></td> </tr> <tr> <td>Ground Maintenance Assets</td> <td>1</td> <td>2</td> <td>0</td> <td>74</td> <td>0</td> <td>0</td> <td></td> </tr> <tr> <td colspan="8">Campus/Site 16</td> </tr> <tr> <th>Description</th> <th>H&S Issues</th> <th>Priority 1</th> <th>Priority 2</th> <th>Total Assets</th> <th>Total Systems</th> <th>Total Images</th> <th>Service Tickets</th> </tr> <tr> <td>A - Old Schools</td> <td>0</td> <td>107</td> <td>3</td> <td>908</td> <td>1</td> <td>2019</td> <td>16 open</td> </tr> <tr> <td>B - Old Press</td> <td>0</td> <td>0</td> <td>1</td> <td>4239</td> <td>43</td> <td>5396</td> <td>31 open</td> </tr> <tr> <td>C - Scroope House</td> <td>0</td> <td>3</td> <td>2</td> <td>8581</td> <td>51</td> <td>10347</td> <td>72 open</td> </tr> <tr> <td>D - Downing Site</td> <td>1</td> <td>1007</td> <td>26</td> <td>19936</td> <td>234</td> <td>33156</td> <td>172 open</td> </tr> </tbody> </table> <p>The map on the right shows the location of the assets, with a blue pin indicating the current location. The breadcrumb trail at the top of the page reads 'Portfolio > Explore'.</p>	Description	H&S Issues	Priority 1	Priority 2	Total Assets	Total Systems	Total Images	Service Tickets	Administration	0	0	0	0	0	11		Ground Maintenance Assets	1	2	0	74	0	0		Campus/Site 16								Description	H&S Issues	Priority 1	Priority 2	Total Assets	Total Systems	Total Images	Service Tickets	A - Old Schools	0	107	3	908	1	2019	16 open	B - Old Press	0	0	1	4239	43	5396	31 open	C - Scroope House	0	3	2	8581	51	10347	72 open	D - Downing Site	1	1007	26	19936	234	33156	172 open
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When a desired location or asset has been found ...

A5 Depending on your role and permissions, you may be able to click here to view or edit location/asset info:

- Add Attachment
- + Create Space
- + Create Asset
- + Create System
- Edit
- Edit Floor Plans

A6 Click to see a Job history relating to the location/asset.

A7 Click tiles to be taken to relevant *Ticket*, *Job* or *Compliance* pages.

By Location		By Element		Legal Documents			
Search		Search		Search			
Description	H&S Issues	Priority 1	Priority 2	Total Assets	Total Systems	Total Images	Service Tickets
00 - Ground Floor	0	24	0	82	0	157	
01 - First Floor	0	0	0	68	0	109	
02 - Second Floor	0	25	0	77	0	158	
03 - Third Floor	0	24	0	64	0	140	

Task B: Space Manager

B1 Navigate to *Portfolio* > *Space Manager*.

B2 Find a location by:

- searching by keyword.
- using a filter.
- searching in a column header.

B3 Edit details.

B4 Use the *Download Spaces* button to create an Excel file of listed locations.

B5 Clicking the small arrow next to *Download Spaces* gives the additional option of saving the current filtered view.

UNIVERSITY OF CAMBRIDGE Portfolio Space Manager

Total Spaces: 42364

Search: Search

Search results (showing: 50 of 42364) Download Spaces Maximize

ID	Created Date	Edited Date	Building	Location Path	Description
Edit	17/01/2024	24/05/2024	A011 : The Old Schools	A011 : The Old Schools > 00 : Ground Flo...	A011-00-0034 : West Roof
Edit	17/01/2024	24/05/2024	A011 : The Old Schools	A011 : The Old Schools > 00 : Ground Flo...	A011-00-0049 : Gardenia R
Edit	17/01/2024	24/05/2024	A011 : The Old Schools	A011 : The Old Schools > 00 : Ground Flo...	A011-00-0039 : General Bc
Edit	17/01/2024	24/05/2024	A011 : The Old Schools	A011 : The Old Schools > 00 : Ground Flo...	A011-00-0026 : Reprograp
Edit	17/01/2024	24/05/2024	A011 : The Old Schools	A011 : The Old Schools > 00 : Ground Flo...	A011-00-0015 : G52 Office
Edit	17/01/2024	24/05/2024	A011 : The Old Schools	A011 : The Old Schools > 00 : Ground Flo...	A011-00-0007 : G43 Office
Edit	17/01/2024	24/05/2024	A011 : The Old Schools	A011 : The Old Schools > 00 : Ground Flo...	A011-00-0036 : Sponsors S
Edit	17/01/2024	24/05/2024	A011 : The Old Schools	A011 : The Old Schools > 00 : Ground Flo...	A011-00-0010 : G45 Acade
Edit	17/01/2024	16/10/2024	A011 : The Old Schools	A011 : The Old Schools > 00 : Ground Flo...	A011-00-0001 : Reception
Edit	17/01/2024	24/05/2024	A011 : The Old Schools	A011 : The Old Schools > 00 : Ground Flo...	A011-00-0019 : Strong Roc
Edit	17/01/2024	24/05/2024	A011 : The Old Schools	A011 : The Old Schools > 00 : Ground Flo...	A011-00-0030 : Office
Edit	17/01/2024	24/05/2024	A011 : The Old Schools	A011 : The Old Schools > 00 : Ground Flo...	A011-00-0023 : Reprograp
Edit	17/01/2024	24/05/2024	A011 : The Old Schools	A011 : The Old Schools > 00 : Ground Flo...	A011-00-0009 : G44 Office
Edit	17/01/2024	24/05/2024	A011 : The Old Schools	A011 : The Old Schools > 00 : Ground Flo...	A011-00-0050 : Temporal S
Edit	17/01/2024	24/05/2024	A011 : The Old Schools	A011 : The Old Schools > 00 : Ground Flo...	A011-00-0008 : Corridor 3
Edit	17/01/2024	24/05/2024	A011 : The Old Schools	A011 : The Old Schools > 00 : Ground Flo...	A011-00-0027 : Store
Edit	17/01/2024	24/05/2024	A011 : The Old Schools	A011 : The Old Schools > 00 : Ground Flo...	A011-00-0012 : G50 Male 1

Task C: Asset Manager

C1 Navigate to *Portfolio* > *Asset Manager*.

C2 Find an asset by:

d. searching by keyword.

e. using a filter.

f. searching in a column header.

B4 Use the Download button to create an Excel file of listed assets.

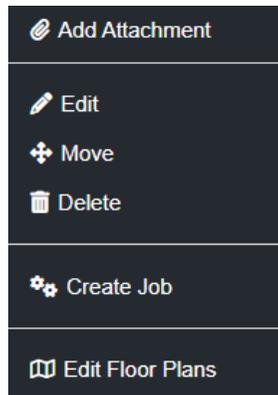
B5 Click *History* to view a list of Jobs relating to the asset.

B6 Click *Link* to go to asset page ...

Type	Created Date	Edited Date	Description	Next PPM	
Link	History	Assets	10/05/2019	25/10/2024	AIR : Sprinkler pump (S)
Link	History	Assets	10/05/2019	25/10/2024	Air : Sprinkler pump (S)
Link	History	Assets	22/02/2019	11/09/2024	AIR : Sprinkler test pump
Link	History	Assets	21/02/2019	25/10/2024	AIR : Sprinkler test pump (N)
Link	History	Assets	22/02/2019	25/10/2024	AIR : Sprinkler test pump (S)
Link	History	Assets	21/02/2019	10/09/2024	Air : Sprinkler test pump
Link	History	Assets	21/12/2023	09/02/2024	Filtration, Conditioning and pH Correction - Central...
Link	History	Assets	10/05/2019	29/10/2024	Sprinkler test pump (N)
Link	History	Assets	10/05/2019	25/10/2024	Sprinkler test pump (N)
Link	History	Assets	10/05/2019	25/10/2024	Sprinkler test pump (N)
Link	History	Assets	10/05/2019	25/10/2024	Sprinkler test pump (N)
Link	History	Assets	10/05/2019	25/10/2024	Sprinkler test pump (N)
Link	History	Assets	10/05/2019	25/10/2024	Sprinkler test pump (N)
Link	History	Assets	10/05/2019	25/10/2024	Sprinkler test pump (N)
Link	History	Assets	10/05/2019	25/10/2024	Sprinkler test pump (N)

... From the Asset page:

B7 Depending on your role and permissions, you may be able to click here to access the following menu:



B7 Click to see a Job history relating to the asset.

B8 Click tiles to be taken to relevant *Ticket*, *Job* or *Compliance* pages.

