Explaining TMA – Request Side

What is it: TMA is the software used to track requests coming into Design Services. If the information is received from elsewhere, it still needs to be entered into the system (See ‘How Do I Make A Request?’).

A request must be assessed and assigned upon receipt.

Request Type Options (most commonly used for Design Services):

MCP Minor Capital Project Request (default) This is used for project value under $25,000.

PFA Major Capital Project Request This is used for project values over $25,000.

If request should be directed to one of the Trades, please use:

WEB iServiceDesk Request This is used for the Service Center to assign appropriately

TMA Status Options (most commonly used for assignment) (with definitions):

**For Minor or Major Projects:**

Project request is in queue for an Estimate

Project Estimate has been completed

Project request is in active Planning

Estimate development is in progress

Project request is in queue for Planning

**For Major Projects Only:**

Submitted for project number only

**For JDI:**

Validating account expenditure authorization

**Once Funding is Received:**

Project request in queue for PM assignment

PM assigned to investigate project needs

Project is under construction

Plant Fund Requested

**If A Project is Reaching 90 days or Cancelled:**

Request in queue for Closing

Completed

Cancelled

**Not used by Design Services:**

Submitted to Director of Eng for Approval

Project on hold per direction of customer

Status Indicators for Estimating and Planning

(Why/When you receive an email notification):

Cancelled

Request has been received

In queue for Estimate

Estimate development in progress

In queue for Planning

In Active Planning

Project Estimate Completed

In queue for PM Assignment

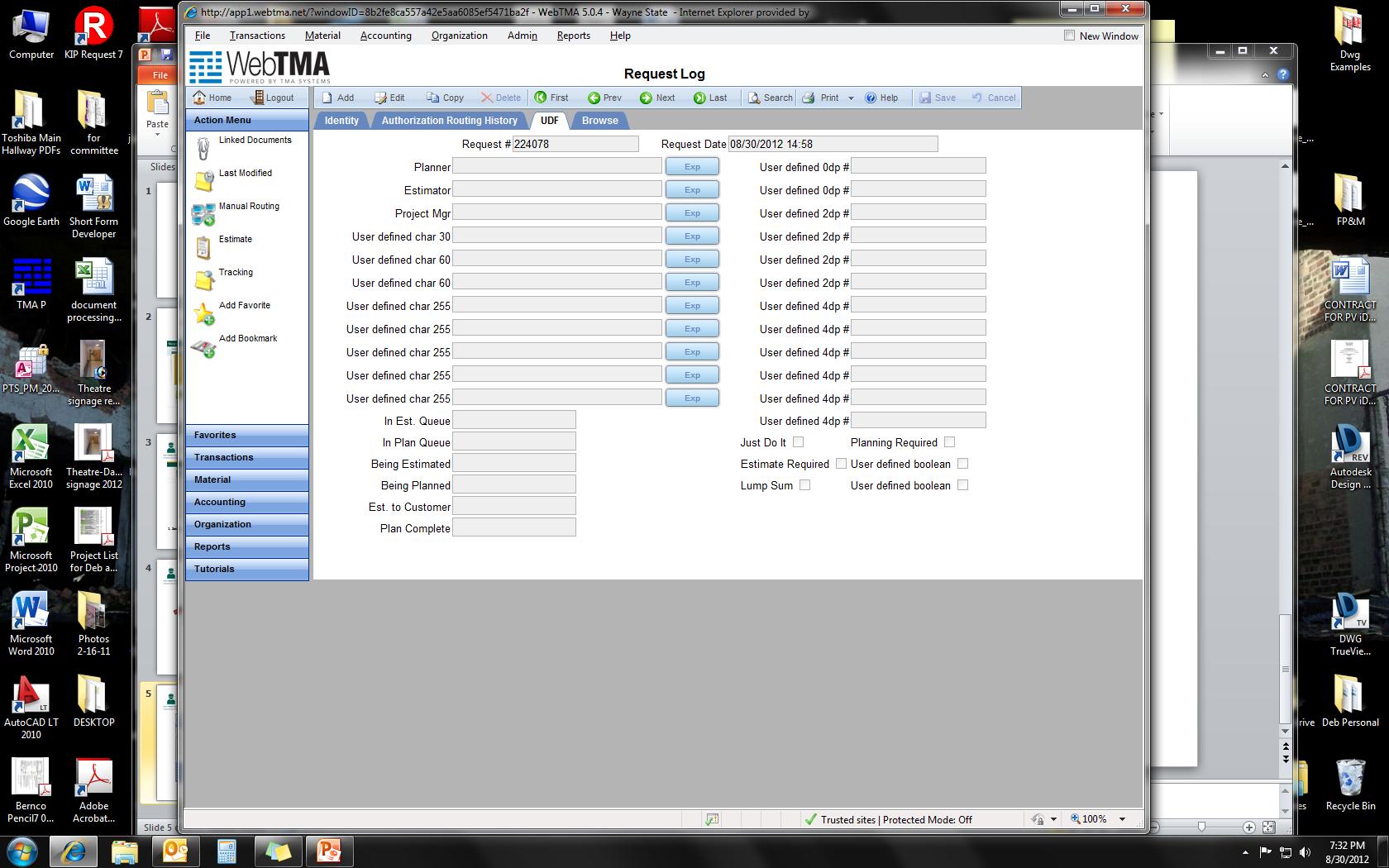
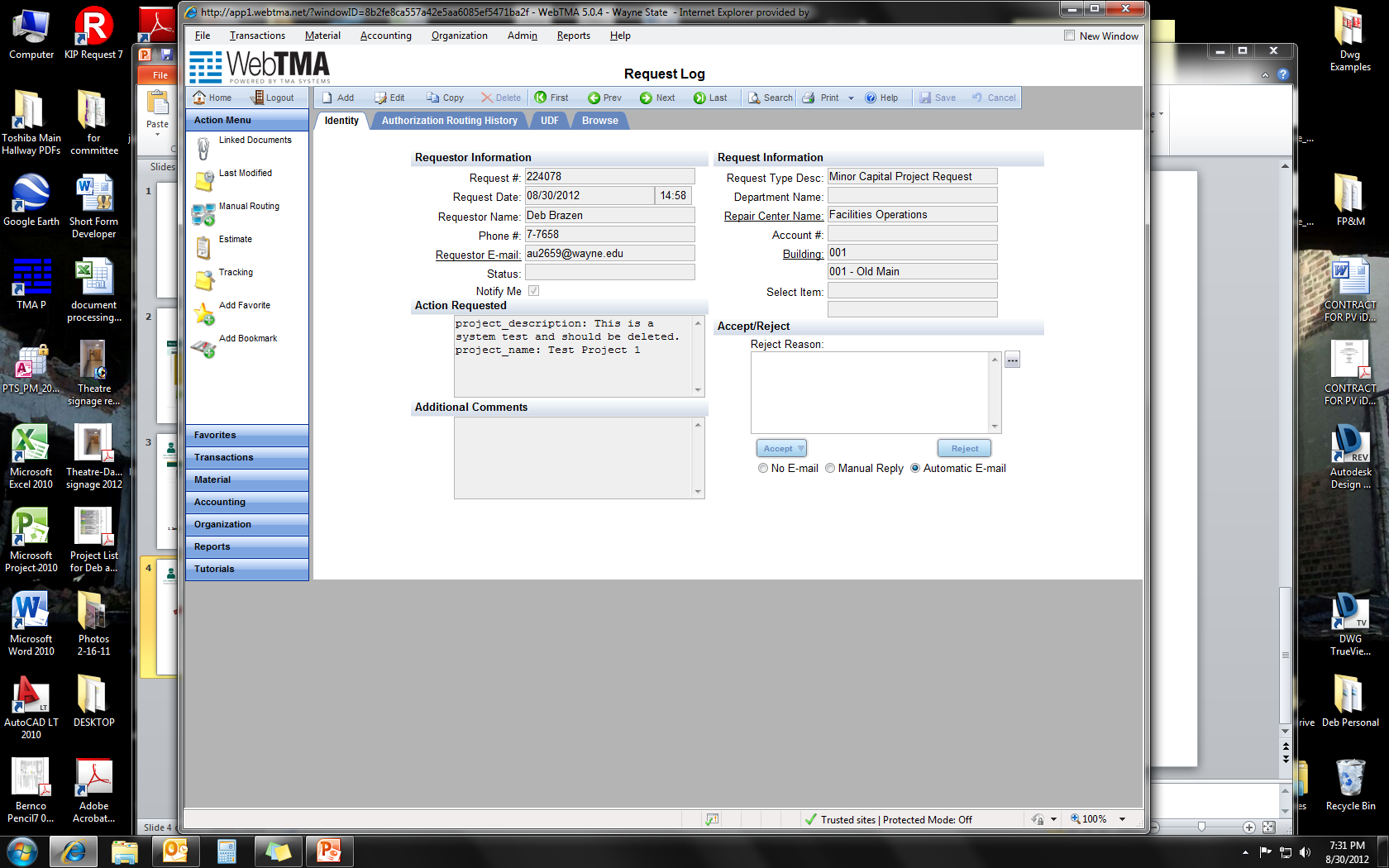
Key Performance Indicators for Planning and Estimating

Estimate Alone – 10 Business Day turn-around to customer

Planning with Estimating – 30 Calendar Day turn-around to customer ‘Minor’

60 Calendar Day turn-around to customer ‘Major’

Authorization MUST come from a Business Affairs Officer or other approved individual within the school/college/division unit who can encumber funds



Who is involved:

Forms:

Filing: