UpM (UTDesign Procurement Manager) is a web-based, centralized tool for procurement of materials for UTDesign projects. It provides up-to-date request, order and budget information for every project each user is involved with.

1. Students submit procurement and reimbursement requests.
2. Technical managers and faculty advisors (FA/TM) review and approve/reject the requests.
3. UTDesign places the orders and shares order, shipping and financial information. UTDesign can reject requests.

Students should read the procurement process and preferred vendor list before:
- making procurement requests.
- buying any items themselves and getting reimbursed.

To use the UTDesign Procurement Manager, you must:
1. Connect to the university network, using VPN when necessary.

Do not reply to emails from UPM, the tool does not have an inbox. 
Send comments, feedback and improvement suggestions to utdesign@utdallas.edu.

**Students**
Always use UPM for procurement and reimbursement requests, and order, expense, and budget status.

**Procurement Requests**
1. Select the Procurement tab.
2. Select the date the project needs the materials; remember to include time for shipping and handling.
3. In Justification of Expenses, type in why you need these products. If the vendor is Amazon, then you must explain that the item is not available from any of the preferred vendors. Make sure that the Amazon vendor is in the US.
4. In Additional Info, type in any other information that will help the UTDesign office place the order.
5. Click Add Item button to enter product information for each item:
   - Copy and paste the information from the vendor’s website/quote, include color, size, etc.
   - If there is no URL, please enter the quote number etc. needed when the order is placed.
   - Attach all documents needed to place the order e.g., quote, PCB files etc.
6. When you click Submit, the tool will send an email notification to your FA/TM.

**Reimbursement Requests**
1. Select the Reimbursements tab.
2. Click New Reimbursement button.
3. In Justification of Expenses, type in why you need these products. If the vendor is Amazon, then you must explain why the item had to be purchased from Amazon.
4. In Additional Info, type in any other information that will help UTDesign place the order.
5. Attach a copy of each receipt. The receipts must show the vendors name, a detailed list of everything that was purchased, date of purchase, and that a payment was made.
6. When you click Submit, the tool will send an email notification to your FA/TM.

Submitted Requests
1. You will receive an email when the status of the procurement/reimbursement request changes. Rejected procurement requests will have comments explaining why the request was rejected.
2. Select the tab for Procurements or Reimbursements to see the status of your project’s requests. Click on a request to see more detailed information.

Expense/Budget Information
The Cost Summary tab shows the project’s starting budget, a total of what has been spent to date, and how much is currently left of the project’s budget. It will also show per procurement request how much was spent on each item, shipping, fees, refunds for out-of-stock items, etc.

Faculty Advisors/Technical Managers (FA/TM)
Always use UPM to review, approve, or reject new procurement requests, and to look up order, expense, and budget information.

Procurement Requests
1. Select the Procurements tab. Requests waiting to be reviewed will show as ‘Pending (TM)’.
2. Click on a procurement to see the details i.e., items, quantities, costs, etc.
3. Click Approve or Reject when done reviewing:
   o Approved procurement requests:
     - The tool sends an email to the UTDesign office to inform them about the approved request. The UTDesign office can then begin placing the order. Comments are optional.
   o Rejected procurement requests:
     - The tool sends an email to the student team to inform them of the rejected request.
     - Comments are mandatory. Please let the students know why the request was rejected, and let them know what actions they need to take next.

Reimbursement Requests
1. Select the Reimbursements tab. Requests waiting to be reviewed will show as ‘Pending (TM)’.
2. Click on a reimbursement to see the details i.e., items, quantities, costs, etc.
3. Click Approve or Reject when done reviewing:
   o Approved reimbursement requests:
     - The tool sends an email to the UTDesign office to inform them about the approved request. The UTDesign office can then start processing the reimbursement.
   o Rejected reimbursement requests:
     - The tool sends an email to the student team to inform them of the rejected request.
     - Comments are mandatory. Please let the students know why the request was rejected, and let them know what actions they need to take next.
Project information
Click the Projects tab to see a list of all the projects you are mentoring. The list includes the following information for your current projects: project number, title, sponsor, advisors/mentors, involved departments, starting budget, remaining budget, and project start and end dates.
To see project information for past projects, select Inactive Projects.

Team information
Click the Teams tab to get the following information about the teams you are mentoring: project number, project title, names, roles, and email addresses.
To see team information for past projects, select Inactive Projects.

UTDesign Office
The UTDesign office is also the administrator of the UPM tool. Please do not hesitate to send an email to utdesign@utdallas.edu if you have any questions or improvement suggestions.

Procurement Requests
The UTDesign office receives a notification from UPM when a FA/TM has approved a procurement request. The office has the ability to reject a request if it has missing/incorrect information such as issues with the vendor, missing attachments, missing quotes, etc.

UTDesign places the orders and will enter the order and tracking information into UPM when it is available. Note that not all vendors provide tracking information. Any issues will be communicated via UPM as well.

Reimbursement Requests
The UTDesign office receives a notification from UPM when a FA/TM has approved a reimbursement request. The office has the ability to reject a request if it has missing/incorrect information such as missing attachments, etc.

UTDesign will initiate the reimbursement process. Please note that reimbursements may take some time since there are many different departments involved, especially if the student has to be registered in the payment system.