UTDesign Procurement Manager

UTDesign Capstone and EPICS projects have an allocated budget to cover expenses for equipment, parts, shipping, etc. The procurement requests are processed using the ‘UTDesign Procurement Manager’ tool (see Procurement Process), which is a web-based, centralized tool for the handling of procurement requests, orders, and expense tracking. It is used by UTDesign students, faculty advisors/technical managers (FA/TM), and the UTDesign office.

Do not reply to notification emails sent by the tool, the email is account is not monitored.

To use the UTDesign Procurement Manager, you must:

- Connect to the university network, using VPN when necessary.
- Login: <netid>@utdallas.edu.
- Password: Contact utdesign@utdallas.edu to get your password.

The tool is a work in progress, so please send improvement suggestions to utdesign@utdallas.edu.

Students

Always see the UTDesign Procurement Manager to submit procurement requests; and look up order, expense, and budget information.

Submit New Procurement Request

1. Select the New Procurement tab.
2. Enter the vendor name (only one vendor per form) and select the date your project needs the part(s).
3. Click Add Item button to enter product information for each item.
   - Copy and paste description from the vendors website. Make sure to include color, size, etc.
   - Copy and paste URL that links to the item description on the vendors webpage.
   - Copy and paste the price from the item description, and enter the quantity needed.
4. 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 (verify that Amazon’s vendors are in the US).
5. In Additional Info, type in any other information that will help the UTDesign office place the order.
6. When you click Submit, the tool will send an email notification to your FA/TM.

Procurement Request Status Information

The tool will send out notification emails when the status of a procurement request changes, e.g. approved, rejected, and order information. Rejected procurement requests will have comments explaining why the request was rejected.

To see the status of previously submitted procurement requests:

- Select the tab for Procurement History. This will list all procurement requests submitted by your project.
- Click the button to see more information about a specific procurement request, i.e. order number, who placed the order, order date, shipping cost, and tracking information (if available).

Expense/Budget Information

Select the tab for Cost Summary. The Cost Summary 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 all the items, shipping, fees, refunds for out of stock items, etc.
Faculty Advisors/Technical Managers (FA/TM)

Always use the UTDesign Procurement Manager to review, approve, or reject new procurement requests, as well as look up a project’s order, expense, and budget information.

Approve/Reject Procurement Request

1. Select the tab for Procurement History. Procurement requests waiting to be reviewed will have a pending status.
2. Click the button to see the details for a specific procurement request such as items, quantities, costs, etc.
3. Click Approve or Reject when done reviewing.
   a. Approved procurement requests:
      - The tool sends a notification email to the UTDesign Office to inform them about the approved request. The UTDesign office can then start to work on placing the order. Comments are optional.
   b. Rejected procurement requests:
      - The tool sends a notification 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 no., title, involved departments, sponsor, starting budget, and project start/end dates.

1. To get project information for past projects, select Inactive Projects.
2. To narrow your search, select a field in the Filter By drop-down list and enter a keyword in the Search field.

Team member information

Click the Teams tab to see the members of each team you are mentoring. For each current team, the information listed includes the following information: project number, project title, names, roles, and email addresses.

1. To get team information for past projects, select Inactive Projects.
2. To narrow your search, select a field in the Filter By drop-down list and enter a keyword in the Search field.

Cost Summary

Get starting budget, current expense total, and see what remains of a project’s budget from Cost Summary.

1. Click the Cost Summary tab. Capstone is default. Select EPICS if you want to see costs for an EPICS project.
2. Under Project Number and Title, select a project from drop-down menu, or type a keyword for searching.

UTDesign Office

The UTDesign office will receive a notification email from the tool when a FA/TM has approved a procurement request.

The office will enter order and tracking information into the tool as it is received from the vendors, but please note that this may take some time/days. Also, note that not all vendors provide tracking information. The office has the ability to reject the procurement request if there is missing/incorrect information in the submitted procurement request, issues with the vendor, missing quote, etc.

The tool will send out notification emails to the students and the FA/TM for all updates. Contact the UTDesign office if you have any questions.