



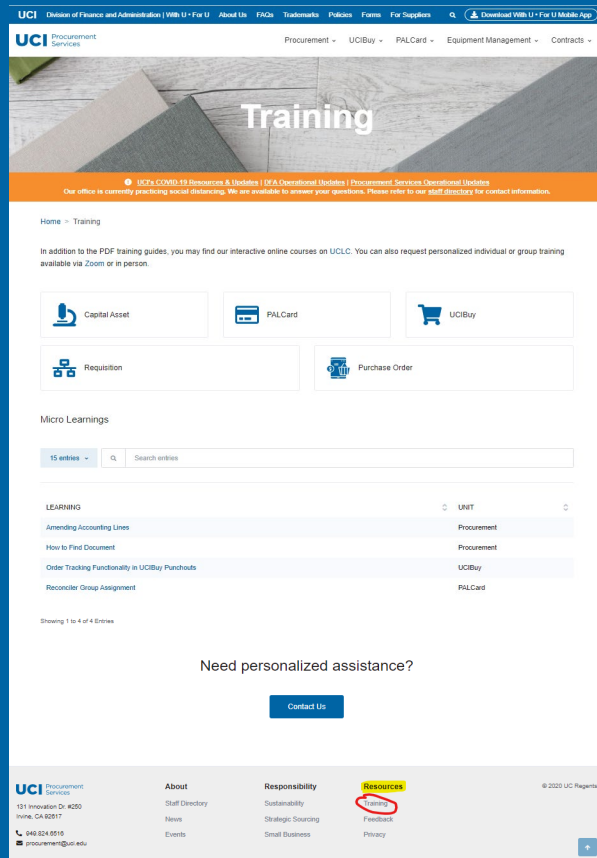
Trademarks & Strategic Contracts

Procurement Services Department Buyer Training Session
Tuesday, July 27, 2021

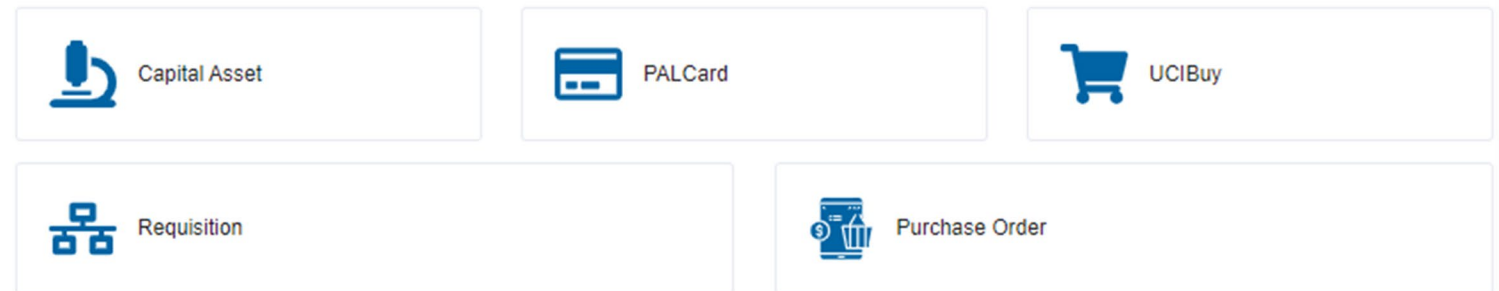
UCI Division of Finance and Administration |  With U • For U

Procurement Training

Robust **training guides** are available on the Procurement website and can be accessed from the footer of each web page.



In addition to the PDF training guides, you may find our interactive online courses on UCLC. You can also request personalized individual or group training available via Zoom or in person.



Procurement Training

Table of Contents

How to: Enter a KFS Requisition	1
Step 1: Access the Portal	1
Step 2: Document Header displays information to assist in retrieving or tracking a Requisition	1
Step 3: Document Overview Tab	2
Step 4: Delivery Tab	3
Step 5: Vendor Tab	3
Step 6: Items Tab	5
Step 7: Capital Asset Tab	9
Step 8: Additional Institutional Info Tab	15
Step 9: Notes and Attachments Tab (if applicable)	15
Step 10: Calculate and Submit the Requisition	16
Step 11: Reload	17
Step 12: Route Log Tab Tutorial	17
How to: Perform a Search in KFS	19
Building Lookup	20
Vendor Lookup	20
Commodity Code Lookup*	21
Search Hints	22
Account Lookup	22
How to: Set up a Recurring Payment Requisition	25
Recurring Payment Guidelines	25
Multi-Year Contracts	25
Document Overview Tab	25
Delivery and Vendor Tab	25
Items Tab	25
Payment Info	26
Notes and Attachments Tab	26
Calculate and Submit the Requisition	26
How to: Copy a Requisition	27
Step 1: Copy the Requisition	27

In addition to our guides and micro-learnings, you can request a **one-on-one session** conducted via Zoom for a more personalized learning experience.

Please contact Shauna Niswonger at shauna.n@uci.edu.

Today's Agenda

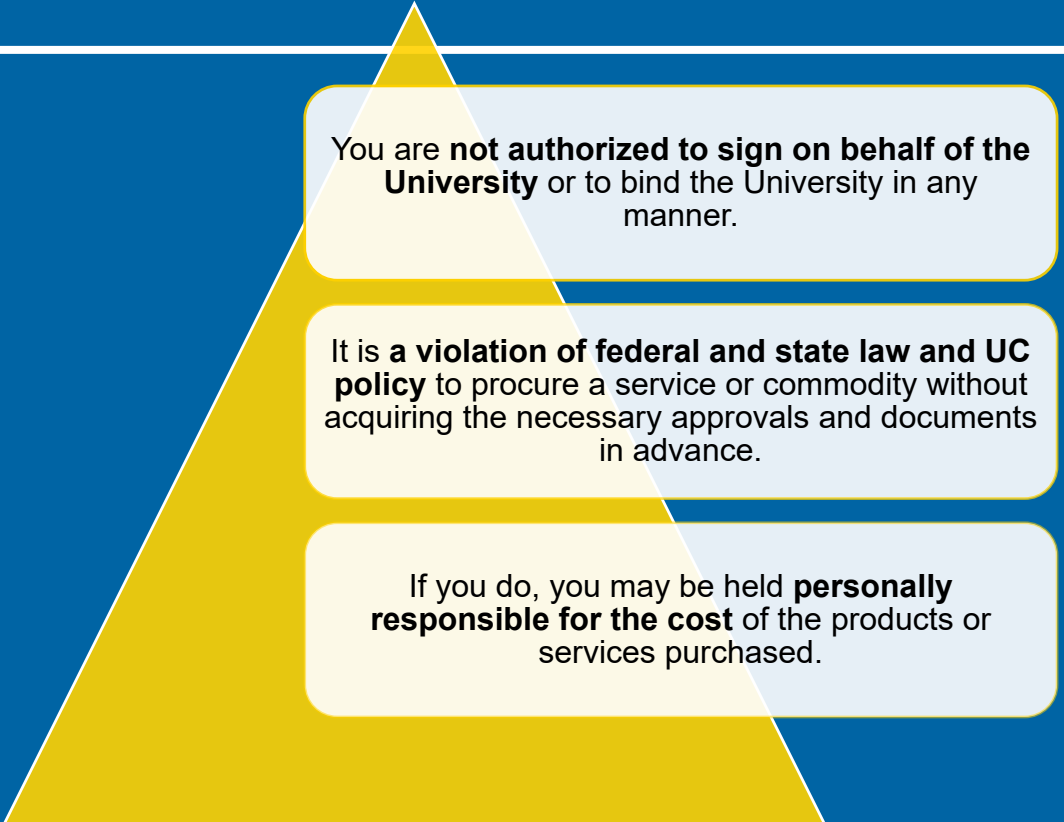
- Welcome
- Ordering Branded Merchandise
- Resources
- Q & A



Remember

As an employee of a public university, it is your responsibility to comply with all procurement laws, rules, regulations, executive orders, policies and procedures concerning the purchase of goods and services:

- UCOP BUS-43
- UCI 707-10
- California Public Contract Code



You are **not authorized to sign on behalf of the University** or to bind the University in any manner.

It is a **violation of federal and state law and UC policy** to procure a service or commodity without acquiring the necessary approvals and documents in advance.

If you do, you may be held **personally responsible for the cost** of the products or services purchased.

UCI Procurement Services Trademarks & Strategic Contracts



Hung Pham
*Trademarks & Strategic
Contracts Director*

trademarks@uci.edu

Ordering Branded Merchandise

How to purchase branded merchandise!

1. Introduction to Trademarks

- What it is;
- Examples;

2. UCI Licensing Program

- Brand protection;
- Corporate Social Responsibility;

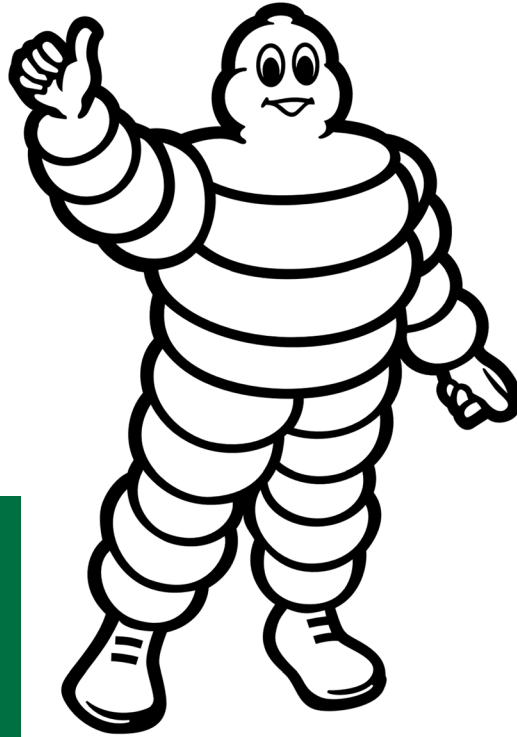
3. Process for purchasing branded merchandise for departments

What is a trademark?

Any **word**, **symbol**, **design**, **logo**, or **slogan** that identifies and distinguishes the **SOURCE** of one product or service from another.



Examples of trademarks



UCI's Trademarks



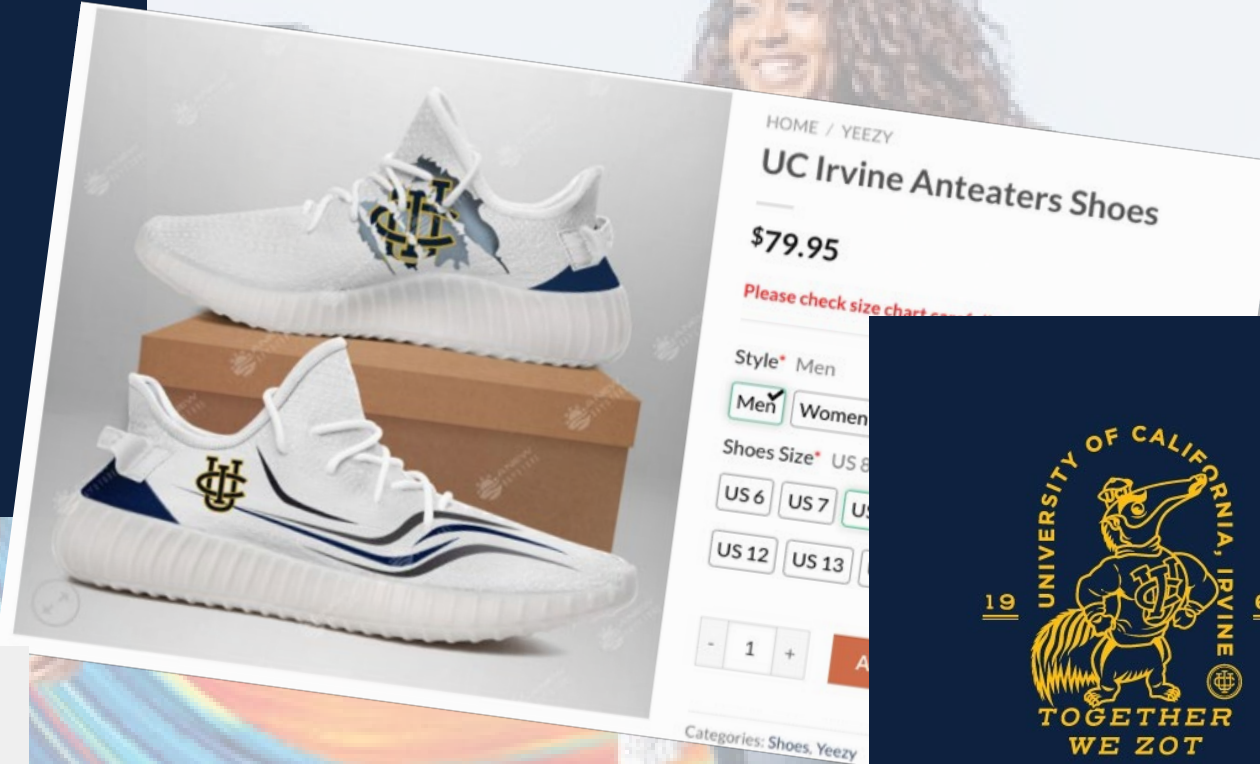
Brand Protection



Brand Protection

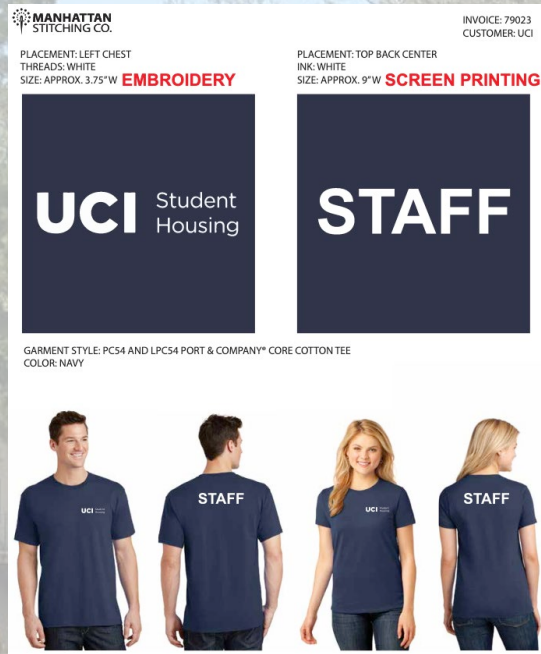


Protecting UCI's Brand



UCI's Licensing Program

UCI grants **permission** to use our trademarks on items through a **LICENSE**



What is a LICENSEE?

-A company that specializes in creating items bearing a licensor's marks.

-For UCI licensees, they are contractually bound to comply with the **UC Code of Conduct**

-Not** all “approved or on-boarded vendors” are **LICENSEES!****

Corporate Social Responsibility

UC Code of Conduct

SOCIAL RESPONSIBILITY

-Prohibits use of **FORCED, SLAVE, or CHILD labor** in any part of the manufacture of merchandise

-Requires **transparency** throughout the supply chain of merchandise bearing University marks

Social Responsible Sourcing and Risk

The New York Times

China's Detention Camps for Muslims Turn to Forced Labor



Chinese state television showed Muslims attending classes on how to be law-abiding citizens. Evidence is emerging that detainees are also being forced to take jobs in new factories.

VISUAL INVESTIGATIONS

China Is Using Uighur Labor to Produce Face Masks

A Times video investigation identified Chinese companies using a contentious labor program for Uighurs to satisfy demand for P.P.E., some of which ended up in the United States and other countries.

University Monitoring Programs



FAIR LABOR
ASSOCIATION®



**WORKER
RIGHTS
CONSORTIUM**

Common Question About Our Trademarks

What must be licensed?

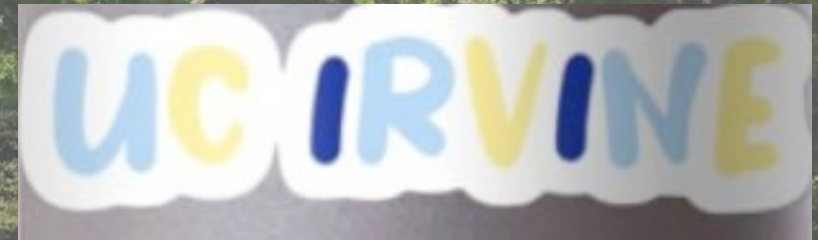
- Most items/apparel bearing University marks.

What if the item is not using the University font?

- “Marks” are not limited to a specific font (recall the knockoff brands)

UCI

UC Irvine



Less Common Items that Must be Licensed

- **Pop-up Canopies**
- **Edibles (i.e. cookies, cakes)**
- **Banners (i.e. step-and-repeat backdrops)**
- **Stickers and decals**
- **Again, you can always check with trademarks@uci.edu**

Other Common Questions

Are there any items EXEMPT from licensing?

- **Specialized Uniforms (i.e. Police Uniforms, hospital scrubs)**
- **Business collateral (i.e. letterhead, business cards, flyers)**
- **If in doubt, contact me at trademarks@uci.edu**

What if Strategic Communications has approved of the design?

- **The item will still typically need to be produced by a licensee**
- **Remember, an “approved vendor” does NOT mean that they are a licensee**

Branding for Departments

4.4 Master Branding

Master branding our Schools is smart business. By communicating a clear relationship to the University, each school can leverage the equity of the University brand. This in turn elevates the University's status by means of a clear association to each School's offerings and achievements.

School Signature

UCI Name of School

Primary ID

School Name

School Signature Configuration 1 – Preferred

UCI School of Education

Primary ID

School Name

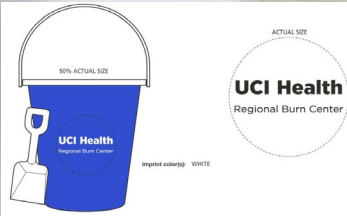
School Signature Configuration 1 – Example

UCI Name of School
Second Line If Needed

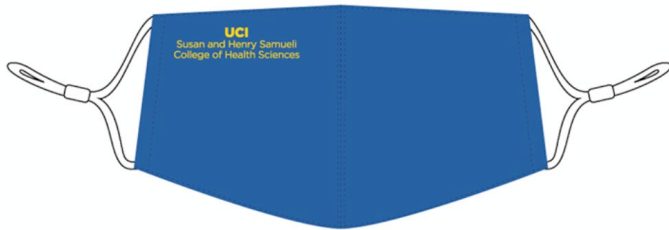
School Signature Configuration 2 – Flush Left, Stacked

UCI Name of School
Second Line If Needed

School Signature Configuration 3 – Centered, Stacked



Style 905: Adjustable



UCI University of California, Irvine

Only use colors as specified in this document.

UCI University of California, Irvine

Do not skew or distort the Signature. Only scale artwork proportionately.

UCI University of California, Irvine

Do not alter the Signature with a different typeface.

UCI University of California, Irvine

Do not enclose the Signature in a tight shape.

UCI University of California, Irvine

Do not create a Signature using more than one color.

UCI University of California, Irvine

Do not place the Signature on a background that may compromise legibility.

UCI University of California, Irvine

Do not alter the relationship of the Signature elements.

UCI University of California, Irvine

Do not outline the Signature.

UCI University of California, Irvine

Do not rotate or change the orientation of the Signature elements.

UCI University of California, Irvine

Do not place a light colored Signature on a white background.

University of California, Irvine
UCI

Do not alter the configuration of the Signature.

UCI
University of California, Irvine

Do not add design elements to the Signature.

How *DO* you purchase branded merchandise?

SIMPLE 3-steps:

STEP 1: Select an **AUTHORIZED LICENSEE**

Licensee lists can be found at trademarks.uci.edu

STEP 2: Create artwork – your licensee can help!

STEP 3: Your licensee takes care of the trademark approval request

QUESTIONS/HELP: hung.pham@uci.edu or trademarks@uci.edu

Contact

HUNG PHAM

Director of Trademarks & Strategic Contracts

(949) 824-8964

hung.pham@uci.edu

trademarks@uci.edu

Small Business First Policy

Certified Licensees

Company Name	Contact	Phone Number	Email
Gorilla Marketing	Chris Arranaga	951-353-8133	chris@gorillamarketing.net
I.D. Me Promotions	Jodi Gechtman	818-774-9500	jodig@idmepromotions.com
Main Graphics	Tracy Harvard	949-788-6100 x124	tharvard@maingraphics.net
Manhattan Stitching	Cory Jachnuk	310-489-7754	cory@manhattanstitching.com

Resources

<https://trademarks.uci.edu/>

<https://www.procurement.uci.edu/strategic-initiatives/small-business-first-program.php>

*Thank
You*