TO: Campus Community

DATE: February 26, 2015

Dear Procurement Colleagues:

Procurement Services has developed new course offerings for campus departments. Starting March 2015 new and updated training classes will be available including:

**Accounts Payable**
- Invoice Processing 101

**Distribution Services**
- Mail, Furniture Services and Surplus Sales 101

**Equipment Management**
- Equipment Management 101

**FlexCard**
- FlexCard Department Administrator Training
- FlexCard Department Reviewer Training
- FlexCard Cardholder Training

**Gateway**
- Gateway Systems 101
- Gateway Systems: Guide to Forms
- Gateway Systems: Guide to Receiving
- Gateway Systems: Guide to the Gateway Management Console (GMC)

**Procurement/Contracts**
- Procurement 101

**Subcontracting**
- Subcontracting 101

To register for these training classes, please log into the UCSB Learning Center using your UCSB Net ID at:
https://learningcenter.ucsb.edu/default.aspx. Search for a course offering using a keyword, like “Gateway” or “FlexCard”.

Please note: “Gateway Office Hours”, a weekly drop-in training and Q&A session provided by Procurement Services, is being replaced by the above course offerings. Office Hours will end effective March 30th.

Questions about any training or course offering can be directed to the Gateway Helpdesk.

----------------------------------------------

Jacob Godfrey
Associate Director and Chief Procurement Officer
Business & Financial Services

&

Hannah Morand
Gateway Systems Coordinator
Business & Financial Services
October 27, 2014

Dear Procurement Colleagues:

Classes are back in session and research on campus is growing. We’d like to take this opportunity to provide some new information as well as a couple reminders:

- Open and public competition must be sought for any purchase of goods or service expected to involve an annual expenditure of $100,000. This requirement applies to all funding sources, and is outlined in the UCOP Policy Business and Finance Bulletin (BUS-43), and the Public Contract Code, Section 10507. To minimize any problems related to competitive bidding requirements, please make sure that you involve Procurement Services in the selection of goods or service early, even before a requisition is submitted.
- The UC has established Primary Strategic Sourcing Agreements that have been competitively bid and can be used to purchase goods and services without seeking additional formal competition. Purchases at any dollar level may be made under these agreements without seeking additional competition. UC Strategic Sourcing has also negotiated Price Schedule agreements with many suppliers that provide fixed pricing or discounts for products and services that are available for your use for transactions under $100,000, but may not be used in lieu of competition for transactions exceeding $100,000 on an annual basis.

The Login for this database is: ucsbuser, and the Password is: UCSBuser1. (https://solutions.scquest.com/apps/Router/Login?OrgName=UCOP&URL=)

- For your convenience, we’ve created a Requisition Checklist for Gateway orders. This will assist Department Buyers with ensuring orders are accurately routed, and provides helpful information about restricted commodities and federal orders.
- We will be rolling out a new full class schedule in January 2015, to include a renewed Procurement 101 course, Gateway classes, the Flexcard series, a new Equipment Management class, and a new Subcontracting course. We will also be sending out a Client Service survey soon. Please be on the lookout to sign up for classes and provide your valuable feedback!
- Please provide ample time (an additional 2-7 days) to your requisition if the vendor is coming on campus or providing professional services. These vendors need to provide us with insurance, and this can add time to the process.
- Our website is a great resource of information related to Contracts, Gateway, Goods & Services, Flexcard, and Small Business Administration.

If you have any questions, please email purchasing@bfs.ucsb.edu.

Thank you,

Jacob R. Godfrey
Associate Director & Chief Procurement Officer
Business & Financial Services
University of California, Santa Barbara

Calli Price
Procurement Services Manager
&
Business & Financial Services
University of California, Santa Barbara
Phone: (805) 893-3723
October 8, 2014

TO: Campus Department

FR: Steve Kriz, Assistant Director, Accounting Services

RE: Contract Request Form ‘Closed’– Payments Completed via Form 5 Outside of Gateway

Good Morning Gateway Users,

Please note that as of October 1st, all Contract Request Forms that have been submitted through Gateway will auto-close after final approval, to ensure that invoices will not pay through the system.

Your departments were identified as having Contract Request Forms submitted in the system pre-October 1st. As these Contract Request Forms do not yet have invoices in the system, we will be closing your Purchase Orders manually and ask that you pay any invoices associated with these Contract Request Forms, and all future Contract Request Forms, via Form 5.

Payment of Contract Invoices

- All contract invoices should be submitted to Accounts Payable for payment. Invoices should be accompanied by a Form 5 referencing the ‘GW’ Purchase Order Number and should include supporting documentation.
- If the contract involves Entertainment expenses, then an Entertainment Form 5 should also accompany the invoice.
- A Travel Payment Request form should accompany all Hotel direct bill contracts.

The following is a list of the outstanding Gateway Purchase Orders that have been closed pursuant to this notification:

<table>
<thead>
<tr>
<th>PO #</th>
<th>Supplier Name</th>
<th>Requisitioner</th>
</tr>
</thead>
<tbody>
<tr>
<td>GW00000070811</td>
<td>BELMOND EL ENCANTO</td>
<td>Silva, Heather</td>
</tr>
<tr>
<td>GW00000070639</td>
<td>HEWLETT-PACKARD COMPANY</td>
<td>Allen, Jane</td>
</tr>
<tr>
<td>GW00000070487</td>
<td>PROTOCOLL SERVICES INC</td>
<td>Combs, Leah</td>
</tr>
<tr>
<td>GW00000070464</td>
<td>MITSUBISHI CHEMICAL USA INC</td>
<td>Bard, Sara</td>
</tr>
<tr>
<td>GW00000070372</td>
<td>TRUE NORTH LEADERSHIP INC</td>
<td>Losada, Erica</td>
</tr>
<tr>
<td>GW00000070315</td>
<td>TERRI M ANTON</td>
<td>Morris, Lorie</td>
</tr>
<tr>
<td>GW00000070313</td>
<td>LESLIE LEWIS SIGLER</td>
<td>Upp, Michaela</td>
</tr>
<tr>
<td>GW00000069686</td>
<td>BLACKBAUD INC</td>
<td>Payne, Sarah</td>
</tr>
<tr>
<td>GW00000069320</td>
<td>MELINDA GANDARA</td>
<td>Russell, Diana</td>
</tr>
<tr>
<td>GW00000069051</td>
<td>SAN FRANCISCO STATE UNIVERSITY</td>
<td>Jaimes, Rosalie</td>
</tr>
<tr>
<td>GW00000068688</td>
<td>TRIAD REAL ESTATE GROUP INC</td>
<td>La, Rose</td>
</tr>
<tr>
<td>GW00000068658</td>
<td>VOLOGY</td>
<td>Pulliam, Elizabeth</td>
</tr>
<tr>
<td>GW00000068421</td>
<td>GAVIN ROY PRESENTS</td>
<td>Hernandez, Anna</td>
</tr>
</tbody>
</table>
Guidance on the Contract Request Form process can be found in the Gateway Desk Manual here:

For more information about the Contracts process in Gateway, please see our recent communication to the campus:

If you have any questions please contact the Gateway Helpdesk at help@gateway.procurement.ucsb.edu
September 17, 2014

Dear Campus Procurement Community:

One of the next steps for Procurement Services is to fully integrate Contracts with Gateway. Gateway provides transparency into your contract status, utilizes the same approval workflow capabilities as Purchase Orders, and acts as the system of record for your contract for years to come.

We have been working with many of our high volume departments to test pilot the contracts workflow with success. We are now moving forward to migrate all contract requests into Gateway with the goal that all requests will be routed through Gateway as of December 1st, 2014.

To Get Started Now

We kindly ask that all of your future contract requests be through Gateway. You can do this by using the Contract Request Form located in the Form Section of the Gateway Homepage.

Training

Please find attached a training guide, and visit our website for more information: http://www.bfs.ucsb.edu/procurement/contracts-property. We would be happy to come to your office and provide one-on-one training for your Department if you’re interested. Please e-mail contracts@bfs.ucsb.edu to request a training session for your department.

Updates

Some low risk services can now be processed as a standard Purchase Order. These services include:

- Translation
- Transcription
- Editing Services
- Interpreting Services

Payment of Contract Invoices

As of October 1st, invoices for Contracts will not be paid in Gateway. Gateway will close your PO immediately after approval, so that invoices cannot be paid in the system.

All contract invoices should be submitted to Accounts Payable for payment. Invoices should be accompanied by a Form 5 referencing the GW Purchase Order Number. If the contract involves Entertainment expenses, then an Entertainment Form 5 should also accompany the invoice. A Travel Payment Request form should accompany all Hotel direct bill contracts.
If you have any questions please contact the Gateway Helpdesk.

Jacob R. Godfrey
Associate Director
Business & Financial Services
University of California, Santa Barbara
Phone: (805) 893-3001
Fax: (805) 893-8639

Please re-consider before printing this e-mail. Re-use and recycle! Thank you.
TO: Department Buyers

FR: Hannah Morand, Gateway Systems Coordinator (Acting)

This email was sent to the Department Buyer Role. Please forward this email to all interested Gateway Users within your department.

Gateway Department Buyers,

Check out some of the recent Gateway features and updates that we have been working on for you!

Supplier Updates:

- New Hosted Catalog: HD Supply Facilities Maintenance (Tile in Facilities/MRO Section on Homepage)
- Coming Soon: Airgas, Sigma Aldrich, Life Technologies
- Punch-out/Hosted Catalog Stand-down: Fastenal, MSC, BioExpress
  - Please note that we will still offer each supplier in a non-catalog format for your purchasing needs.

Contracts Update:

- We have created a new Form to process your Contract Requests through Gateway. Please begin routing your contract requests through Gateway using the Contract Request Form located in the Form Section on the Gateway Homepage. If you have any questions please email our Contracts Team at contracts@bfs.ucsb.edu

Entertainment Process:

- If your department procures goods that fall into the programmatic category, please ensure that the "Non-Hosted Business Meeting Expenditures" Form is filled out and attached to your Gateway Purchase Order. This form will give Accounts Payable processors the ability to approve invoices with the knowledge that the goods were authorized appropriately.

New Gateway Resources:

- Department Buyer Checklist - We have created a Department Buyer checklist to help users approve a requisition. This is not a mandatory checklist, just an additional resource. The checklist can be found on our website and as an appendix in the Gateway Desk Manual.
- Savings Field - A new optional field on the requisition that gives departments the ability to track savings on each order. This is not a mandatory field. It will allow departments the ability to capture and track savings.

Removal Process:
In response to recommendations from faculty and staff removals/relocations will not be processed in Gateway. We have removed the respective suppliers from the system. All removal/relocation requests are to be initiated with Travel. Please contact Annette Gonzales in Travel at x7037 for any questions.

If you have any questions about this announcement please contact the Gateway Helpdesk.

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Hannah Morand
Gateway Systems Coordinator (Acting)
To: Campus Community  
Date: 3/18/2014

The campus burglar alarms are now monitored by Bay Alarm. Should your alarm be triggered in error, Bay Alarm will call your department personnel contacts (there are 3 for every department) to ask if the alarm was in error.

- To test your alarm system, or panic button, call Bay Alarm at 1-800-470-1000 to request for permission for the test.

- Check your alarm keypad and be sure there are no instructions to contact Campus Police, should the alarm be tripped in error. A small card can be printed from the attachment, and posted next to the Alarm as a reminder to your staff.

- If you have any questions for Bay Alarm, at any time, they can be reached at 1-800-470-1000.

Please disseminate this information to your staff ASAP avoid unnecessary calls to Campus Police.

Thank you,

Calli Price  
Procurement Services Manager  
University of California, Santa Barbara  
3203 SAASB, Santa Barbara, CA 93106-1150  
805-893-3723

Tq Gaskins  
Lead Dispatcher  
UCSB Police Dept  
805-893-3446  
805-893-8569 (fax)
February 10, 2014
Dear Procurement Colleagues,

On January 2, 2014, we sent a List Serv notice regarding the price increase for helium at Praxair. At that time, Airgas had not passed on the increased price to its UC customers. Starting March 14, we will see a 13.1% increase with Airgas.

Please refer to the attached BLM crude helium prices, a letter from Airgas explaining the price increase, and a spreadsheet showing the new March helium pricing. This price increase applies to all high pressure gaseous cylinders. Liquid helium pricing will not change. Although this price increase is high, Airgas has agreed to wait until March to increase pricing, whereas for other customers, Airgas increased helium pricing by 20% starting January 2014. This saved the UC 20% in cost avoidance through March 14th and 6.9% after that.

If you have any questions, please email purchasing@bfs.ucsb.edu

Thank you,

Calli Price
Manager, Procurement Services
University of California, Santa Barbara
3203 SAASB
Santa Barbara, CA 93106-1150
805-893-3723
January 6, 2014

Dear Procurement Colleagues:

The UC/CSU Computer Hardware purchasing team is currently working on negotiations for better pricing and standard requirements with our computer/IT contracts. To gain a better understanding of what UCSB requires, we are asking your department’s IT stakeholder(s) to complete the below survey.

https://fresnostate.co1.qualtrics.com/SE/?SID=SV_3CbR5tdS61HKnhb.

The results of this survey will help the team better understand your purchasing requirements and provide the most aggressively discounted models / configurations that meet the greatest need. They’re looking to determine what is valuable to UCSB’s users, and the IT personnel who support those users.

The survey will close on January 15th. Please take time to complete the survey at your earliest convenience.

Thank you,
Joe.

Live well, laugh often, and do great things for others every day –
Joe McLain
Joseph.Mclain@sa.ucsb.edu
IT Manager, Student Information Systems & Technology

Calli Price
Acting Manager, Procurement Services
University of California, Santa Barbara
3203 SAASB
Santa Barbara, CA 93106-1150
805-893-3723
January 2, 2014

Dear Procurement Colleagues,

Happy New Year! We have a few updates for the Procurement Community regarding Praxair, CDW-G, and Ricoh; please pass this along to your respective stakeholders as appropriate:

1. Starting January 1, the price of Praxair’s helium gas increased by 15%. All other products on the UCOP contract will remain at last year’s pricing. This increase is in response to continuing increases in feedstock and sourcing costs due to continuing supply/demand imbalances.

   Praxair first approached UCOP for a price increase in November, but we were able to delay the increase until 2014. Because helium supply is volatile right now, it is likely that Praxair will incur another price increase toward the end of Spring. We do not yet know how much this will be but will inform you as soon as information is available. Please know that UCOP Procurement and Praxair are working together to keep these price increases as low as possible. For more detail on helium supply, please see the BLM link below:

2. We have a new campus representative for CDW-G, replacing Rodrick Thomas:

   **Jen Roth**
   [jenstu@cdw.com](mailto:jenstu@cdw.com)
   Sr. Account Manager | CDW-G
   Phone: 866.245.3949 | Fax: 312.705.6411 | Direct: 312.705.6211

3. We have a new campus representative for Ricoh, replacing Kevin Holian:

   Walter Njboke
   Major Account Executive
   Office: 818-703-0265 x 208
   Fax: 818-703-7928
   Email: walter.njboke@ricoh-usa.com

If you have any questions, please email purchasing@bfs.ucsb.edu.

Thank you,

Calli Price
Acting Manager, Procurement Services
University of California, Santa Barbara
November 20, 2013

Dear Procurement Colleagues:

Recently, we have noticed many suppliers are outsourcing and starting to drop-ship from warehouses overseas. This is a good time to remind your end users of UC procedures for international orders. Any acquisition shipped from another country (including Mexico and Canada) is considered Restricted and needs to be routed to Central Purchasing. Please select the Restricted Items drop down for “International Purchases” on your Gateway Requisition. We will ask you to select a Customs Broker, and we add the required information onto your requisition.

Here are some of the reasons supporting the utilization of UC Customs Brokers:

- The various Federal Agencies (Customs, DEA, Homeland Security, BIS, DDTC, Treasury Department and others) are scrutinizing Universities for violating their large numbers of laws and regulations.

- Customs Brokers are the only ones with Powers-of-Attorney to act on behalf of the University of California for import controls.

- The United States Customs and Border Protection (CBP) holds the UC responsible and liable for cargo being imported to the United States for our acquisitions, so we must use a Customs Broker licensed by the CBP to handle this burden. They fill out paperwork and obtain a CBP bond to pass the equipment over the border.

- Federal officials have expressed concern about academic research that could result in the disclosure of information that would be harmful to the national security interests of the United States. In addition, all international shipments of research materials must strictly comply with U.S. export control laws. Therefore, the University of California, through its faculty and staff, must ensure that it performs its research in a manner that complies with governmental regulations and university policy.

Please be aware that the Customs Broker will invoice your department for these services, and remember to budget accordingly.

This information, as well as a listing of our contracted Customs Brokers, is posted on our website. If you have any questions, please feel free to email us.

Thank you,

Calli Price
Acting Manager, Procurement Services
University of California, Santa Barbara
3203 SAASB
Santa Barbara, CA 93106-1150
November 12, 2013

Dear Procurement Colleagues:

Procurement Services has recently experienced a large volume of high value acquisitions that are required to be competitively bid under state and federal law. We would like to remind everyone that open and public competition must be sought for any purchase of goods or service expected to involve an annual expenditure of $100,000. This requirement applies to all funding sources as noted in UCOP Business and Finance Bulletin (BUS-43), and The Public Contract Code, Section 10507. To minimize any problems related to competitive bidding requirements, please make sure that you involve Procurement Services in the selection of goods or service as early as possible.

For your convenience, UC has established Primary Strategic Sourcing Agreements that have been competitively bid and can be used to purchase goods and services without seeking additional formal competition. Purchases at any dollar level may be made under these agreements without seeking additional competition. UC Strategic Sourcing has also negotiated Price Schedule agreements with many suppliers that provide fixed pricing or discounts for products and services that are available for your use for transactions under $100,000. Price schedules cannot be used in lieu of competition for transactions exceeding $100,000 on an annual basis.

You may find that some products are unique or proprietary, and have no comparable competition in the market place. For those transactions please fill out a Sole Source Justification Form. Submission of a form does not guarantee that the proposed vendor will be selected. Procurement Services will assess the validity of the provided justification and may request additional information to determine if the product or service can be competitively bid. It is the end user's responsibility to complete the form and provide supporting documentation. Sole Source requests cannot be used to circumvent competitive bidding requirements. Additional information about sole sourcing can be found on the Procurement Services website.

If you have any questions, please email purchasing@bfs.ucsb.edu

Thank you,

Jacob R. Godfrey
Associate Director & Materiel Manager
Business & Financial Services
University of California, Santa Barbara
Phone: (805) 893-3001
Fax: (805) 893-8639

and

Calli Price
Acting Manager, Procurement Services
University of California, Santa Barbara
3203 SAASB
*** PLEASE GIVE WIDEST DISTRIBUTION ***

October 31, 2013

To: The Campus Community

Fr: Jacob Godfrey, Associate Director, Business & Financial Services

Re: OfficeMax Deliveries

Dear Colleagues:

Central Stores is ending its pilot program and last mile delivery partnership with OfficeMax effective close of business this Friday, November 1st. This means that Central Stores will no longer deliver packages, process returns, or resell OfficeMax products to the campus.

Starting November 4th, OfficeMax will begin delivering orders and picking up returns to and from you directly. We do not anticipate any disruptions in service, and you should continue to receive the same discounts and services that we have come to expect from our primary office supply vendor, including next day delivery for orders placed by 4:00pm.

Representatives from UCSB Procurement, Gateway, and Central Stores are working closely with OfficeMax to ensure a seamless transition. However, if you experience any problems, please notify us immediately by email at help@gateway.procurement.ucsb.edu or by calling x8025.

For your convenience, summaries of how to purchase and process a return are provided below.

Purchases
To order OfficeMax products, login into Gateway and create a requisition by either creating a cart in the OfficeMax punch-out or creating a non-catalog requisition. For additional help or training on how to place an order with OfficeMax, please email the Gateway Helpdesk at help@gateway.procurement.ucsb.edu or call x8025.

Returns
In the event you are not satisfied with your purchase, you may return the merchandise as follows:

- Contact OfficeMax Customer Service via phone (877) 969-6629 or email at customersupport@officemax.com to obtain an Authorization to Return (ATR) number. You will be asked to write the ATR number on a piece of paper and attach it to the box containing the item(s) to be returned so that OfficeMax can process your credit. Please place any returns to be picked up at the same location where your products were delivered.

- Office supplies, ink and toner may be returned in the original MFG packaging for a full refund within 30 days of the original purchase. Opened ink/toner will be eligible for an exact-item exchange regardless of when you made the purchase.
• Furniture, technology items and software may be returned in the original unopened packaging (including all accessories and manuals) within 14 days of the original purchase date. Opened technology products returned within the 14-day period may be subject to a restocking fee. Opened software and defective technology items may be exchanged for the same item within 14 days of the original purchase date. Special order and pre-assembled furniture is not eligible for return.
September 3, 2013

Dear Procurement Colleagues:

We’ve recently seen and heard concerns of vendors charging high shipping costs and handling fees. A good example is Qiagen, who has begun to charge $75 per order for shipping/handling. This is a good time to remind everyone in the procurement community that UCOP Agreement Vendors provide coverage such as warranty, free shipping, returns, and customer service that non-catalog vendors generally do not provide. These vendors have agreed to, and signed common UC Terms and Conditions to protect us from any unforeseen issues that non-catalog vendors may present, such as no returns, unexpected or high shipping fees, no warranty, distributor fees, etc.

Having catalog items readily available in Gateway with our UCOP Agreement vendors saves time (and therefore money) across the board, rather than spending your time and Admin time researching and processing “non-catalog” quotes. While some products in the UCOP Agreement catalogs may be priced higher than you are able to find elsewhere, many of the commonly used products are provided at deep discounts. The UCOP Contracts are negotiated based on bulk and recurring need across all 10 UC campuses.

If you have any questions, please feel free to email us at purchasing@bfs.ucsb.edu or help@gateway.procurement.ucsb.edu

Thank you,

Calli Price
Acting Manager, Procurement Services
University of California, Santa Barbara
3203 SAASB
Santa Barbara, CA 93106-1150
805-893-3723

And

Christine Griffin
Gateway Systems Manager
Business and Financial Services
christine.griffin@bfs.ucsb.edu
Phone 805-893-3348