Branding and Licensing Approval Form User Guide

THE UNIVERSITY OF **ALABAMA**®

Contents

Branding and Licensing Approval Form User Guide

Overview

The University of Alabama's Division of Strategic Communications, Trademark Licensing Office and Office of Procurement Services have joined together to assist University departments and recognized student organizations find and purchase items with imprinted or embroidered University logos or insignias from licensed vendors.

Logos and insignia include any artwork that references the University in any way. This is done to help protect the brand, image and reputation of The University of Alabama. Here is some important information that you need to be aware of prior to obtaining estimates and placing any orders:

- The Purchasing Department currently has contracts in place for various items (i.e. t-shirts, lanyards, uniforms); however, the artwork still needs to be reviewed and approved before a purchase is made.
- If the item you want to purchase is not currently on contract and the total cost of your quote is above the bid limit of $15,000, a bid may be required. Please contact the Purchasing Department before filling out the Approval Form.
- If the item you want to purchase is not on the Approved Contracts list and does not require a bid, you may proceed with a licensed vendor. All artwork must still be approved through use of the Licensing Approval Form.
- For all orders, the approval form must be completed. All artwork and quotes must be attached for review and approval.

If any changes need to be made to the artwork or proposed vendor, the form will be returned to you with an explanation and sent back to the department. Trademark Licensing and Strategic Communications will work with the department on the changes.

Once the artwork has been approved, Purchasing will review the items, cost, purpose and vendor. If the form is disapproved for any reason, it will be returned to the department and Purchasing will assist in making the needed changes. The department may proceed with either the requisition or P-Card purchase after approval from Purchasing has been granted.

For questions on University Trademark Licensing:

Cole Price
Director of Trademark Licensing
205-348-9691
cprice@ia.ua.edu

For questions on University Purchasing:

Jana Weaver
Senior Buyer
205-348-3954
jweaver@fa.ua.edu

For questions on UA Brand Guidelines:

Jimmy Hart
Director of Marketing
205-348-3485
jimmy.hart@ua.edu

For questions on Design and Production:

Austin Dare
Director, Office of Design/Production
205-348-6773
adare@ur.ua.edu

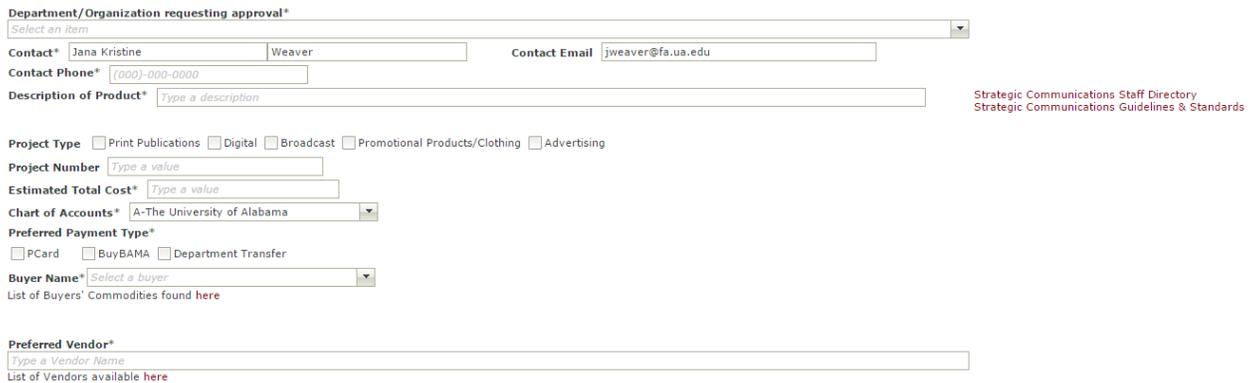## *Steps to Complete the Branding and Licensing Approval Form*

Access the following link: https://everest-sf.fa.ua.edu/Runtime/Form/UALogoApproval/

1. The Log-In Screen will appear first – use your MyBama username and password

2. You will be taken to the Licensing Approval Form. All Fields marked with an asterisk (*) are required.

3. You will need to choose the Department/Organization that will be making the purchase. There is a drop down menu in numerical order based on the Org number.
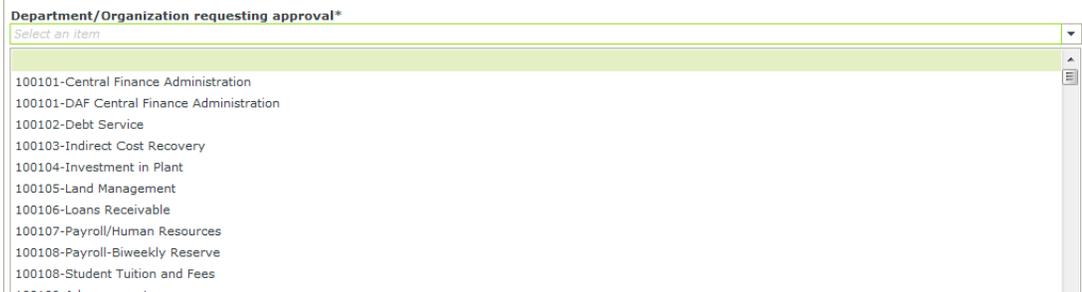
4. Contact First Name, Last Name, Email Address, and Date will be auto-populated based on the log-in information

Department/Organization requesting approval*
Select an item

| Contact* | Jana Kristine | Weaver | Contact Email | jweaver@fa.ua.edu |

Contact Phone* (000)-000-0000

> NOTE: These fields can be changed if needed. Please note that any emails related to the Approval form will still go to the email address attached to the MyBama log-in.

5. Based on the quote you receive from the vendor enter the Product Description.

Description of Product* Type a description

6. Choose the Project Type
   a. Print Publications: Choose this if your project is for any type of print material (i.e. Magazine, Brochures, Flyers, etc…)
   b. Digital: Choose this if your project is for any type of digital media (i.e. online ads)
   c. Broadcast: Choose this if your project is any type of broadcast (i.e. videos)
   d. Promotional/Clothing: Choose this if your project is any type of promotional item (anything imprinted, embossed, engraved, etc…) or clothing.
   e. Advertising: Choose this for any advertisement and then the option that specifically applies to the situation
      i. Outdoor/Billboard
      ii. Radio
      iii. TV
      iv. Print

7. Insert your Project Number, if you have one

> NOTE: This will only be used when working with Strategic Communications

8. Fill in your estimated total cost of the entire order.

9. Choose the Chart of Accounts that will fund the purchase.

10. Choose the preferred payment type:
    a. P-Card: The last 4 digits of the card to be used must be entered. If using the P-Card, a copy of the final approval is needed with your P-Card packet.
    b. buyBAMA
    c. Departmental Transfer

11. Select the buyer for the commodity you are purchasing.

> NOTE: A complete listing of buyers and their assigned commodities is available on the Purchasing Website. (purchasing.ua.edu)

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12. Next the Vendor's Information needs to be entered:
    a. Company Name
    b. Company Address
    c. Contact
    d. Email
    e. Phone Number

<mark>NOTE: If you are working with Strategic Communications and do not have a vendor yet this can be left blank.</mark>

<mark>NOTE: To verify a vendor's license status or to view a list of licensed potential vendors, click the link below the Preferred Vendor field.</mark>

13. Purpose of the Items (more than one may be chosen):
    a. Office Use: If the items will be used in the office or on the job by the faculty or staff.
    b. Promotional: If the items will be used to promote the department or an event the department is hosting.
    c. Fundraising: If the items will be resold
    d. Other: Any category that is not listed above. The purpose will need to be filled in.

14. Business Purpose: Explain why the purchase is necessary and how it benefits the University.

15. Who is the Audience/Recipient? Select the end audience or recipients for the items. If Other is chosen, a description must be included.

16. The vendor's quote and the artwork for the items must be uploaded. Click Add.


<mark>NOTE: File names with the following characters cannot be used: Tilde (~), Number sign (#), Percent (%), Ampersand (&), Asterisk (*), Braces ({ }), Backslash (\), Colon (:), Angle brackets (< >), Question mark (?), Slash (/), Plus sign (+), Pipe (|), Quotation mark (").</mark>

17. For file types .zip, .mp4, and .wav or any file over 16 MB email brandapproval@ua.edu.

18. An attachment line will be added below. Use the drop down box on the left side of the line to select the attachment type: Artwork or Quote.

PUR - Licensing Artwork
PUR - Licensing Attachment
PUR - Licensing Quote
PUR - Purchasing Attachment
PUR - Strat Comm Attachment
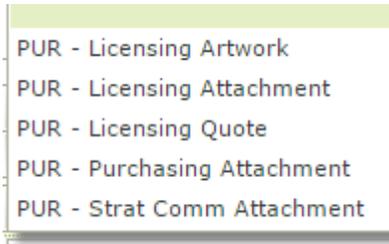
NOTE: Attachment types Licensing Attachment, Purchasing Attachment and Strat Comm Attachment are for Approver's use only.

19. To attach the file click in the "Click here to attach a file" a box on the right side of the screen. A box will pop up to allow you to choose a file on your computer.

Click here to attach a file
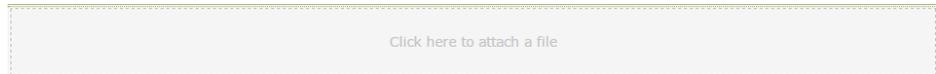
NOTE: All approval forms must include both the artwork and a quote. Multiple files may be attached to one form. **Repeat Steps 16– 19 to add as many attachments as necessary.**

20. Use the comments box under the attachments to add any additional information that may be useful for Licensing or Purchasing approval.

NOTE: If the vendor is still in the process of becoming licensed, please note that here.

21. Click Save.

| Submit | Save | Close |
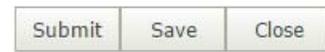
22. Once you have saved the form you have 3 options:
    a. Close
        i. If you do not wish to submit the form right away, you may close and return to the form later. To get back to this form you will need to click the link and then choose the Org you used. It will repopulate any information you have already entered.
    b. Create a PDF
        i. If you would like a copy of the form before you submit it you will need to click Create PDF.
        ii. Once the PDF has been created, click the drop down arrow under the Create PDF button. The file can be opened and saved to your computer.
    c. Submit
        i. If you are ready to submit the form for approval, click submit and the form will be sent to Licensing for approval.

23. Once submitted, you will receive an email with more information. The first email you receive will include a link to the status page where you may view any pending approval forms you may have.

On the status page, click the form and its current location will be displayed in the box at the bottom of your list.

Active UA Logo Processes		
Selected Filter: Default ▼	🔍 Quick Search: All fields ▼	
Folio		**Date Originated**
Weaver-Jana Kristine-4/22/2015 2:36:28 PM-502301-Amy Chambley-85		4/22/2015

Current Location Licensing

FAQ – General Questions on Branding and Licensing

1. What is the purpose of the Approval Form?

   The University Trademark Licensing Office and Division of Strategic Communications, with the support of the Procurement Office, has developed this process in order to review any use of University Trademarks, Logos or Insignia. This is to help protect the University's brand, image and reputation.

2. What is a Trademark?

   A trademark or service mark is a name, design, seal, insignia, or other symbol that an entity uses to identify and distinguish itself and its goods and services from those of another entity, or to indicate to the public its authorization, sponsorship, or affiliation with the provider of goods or services.

3. The vendor I want to use is not licensed, what is the process?

   Refer the vendor to the Trademark Licensing Website for more information.
   http://www.rolltide.com/sports/2016/6/10/licensing-prospective-licensees-html.aspx

4. What if we're not using any UA Logos?

   Anything that references the University in anyway needs to go through the approval process. This includes departmental logos, and logos for events funded by the University.

5. What if an unlicensed vendor is the only one that can produce this item and we must have it?

   Please fill out the approval form and contact Cole Price, cprice@ia.ua.edu, to discuss.

6. Why do we need to fill out this form if we're using the contract vendor?

   The Trademark Licensing Office will still need to review the actual artwork being used to be sure it is in compliance with all regulations.

7. Do I need to fill out a form for each item being purchasing?

   No, one approval form per quote.

8. How do I track the approval status of my form?

   You will receive a confirmation email that contains a link to the status page where you may view any pending approval forms you may have.

For more FAQs on licensing visit the Trademark Licensing website:
http://www.rolltide.com/sports/2016/6/10/licensing-faq-html.aspx

FAQ – Technical Aspects of the Approval Form

1. If the total cost is over $5,000 can I still request an increase so I can pay on the P-Card?

    Yes, you may still choose P-Card. If your form is approved then you may request an increase from P-Card. Please copy the approving buyer on this email.

2. What comments are needed?

    Anything you'd like to let the approvers know. This will go through the Division of Strategic Communications, Trademark Licensing Office and Purchasing Office.

3. Who should I contact if there are issues accessing the Approval Form?

    Please contact Susan Lee, slee@fa.ua.edu.

4. What if I don't know which buyer to choose?

    There is a link on the form to the Purchasing Staff Directory. Each buyer's commodity is listed by their name.

5. Do I have to fill out all the Vendor Information?

    Yes, all information is required.

6. What if I don't have the quote or artwork yet?

    You will need to wait and submit once you have both the quote and the artwork for your form.

7. Can I have more than one form in process at a time?

    Only one form per Department/Organization Code can be left in process at a time.

8. If a P-Card is used for the Purchase what other steps are required?

    A copy of the Final Approval Form needs to be included with your P-Card Packet.