FLEXCARD

What Flexcard can be used to purchase:

- Books
- Image permissions
- Memberships
- Periodical subscriptions
- Office supplies
- Furniture
- Technology equipment
- Most other miscellaneous purchases

Benefits of using Flexcard:

- You don't have to spend your own money
- You don't have to wait for reimbursement
- You don't have to fill out any paperwork

How Flexcard works:

- Purchases are made using a department credit card
- Purchases are paid one-by-one from the credit card statement using department funds (faculty research/grant funds, conference funds, discretionary funds, etc.)

How to use Flexcard:

- Email Sean with web links to the items you want to purchase, the address where you want the items shipped, and the funds you want to use to buy the items
- Sean will place the order (usually within 24 hours) and update you with shipping information

GATEWAY

When Gateway should be used:

- Any miscellaneous purchases that cannot be made with Flexcard, such as:
    - Copy editing
    - Archival work
    - Most other services
    - High-value items
- All situations involving a contract, most commonly
    - Group agreements at a hotel
    - Service agreements for technology equipment

How to use Gateway:

- Request a "quote" from the vendor
    - A "quote" can be any of the following:
        - An actual quote of services
        - Invoice
        - Email exchange
    - A quote should say the following information:
        - Vendor name and address
        - Vendor email and phone number
        - Items or services to be provided and an approximate cost
- Submit the quote to Sean
- The vendor will be contacted by the Purchasing office for additional information if necessary
- The vendor will receive a purchase order via email from Gateway with instructions to submit an invoice for payment
- Once the vendor follows the instructions to submit the invoice, a check will be mailed to the venor

Example of a Gateway purchase:

- Copy editor emails professor with summary of work done, approximate cost, full name, address, email address, and phone number
- Professor forwards this email to Sean
- Sean inputs information into Gateway
- Copy editor receives email from Purchasing requesting additional information
- Copy editor receives purchase order via email from Gateway with instructions to submit invoice for payment
- Copy editor submits invoice for payment
- Check is mailed to copy editor

CONNEXXUS

What Connexxus can be used for:

- Airfare billed directly to department funds (faculty research/grant funds, conference funds, discretionary funds, etc.)
- Travel "bundles" (airfare + hotel + rental car)
    - o Hotel and rental car CANNOT be direct billed—yet

Benefits of using Connexxus:

- Booking for yourself:
    - o You don't have to spend your own money
    - o You don't have to wait for reimbursement
    - o You can still request a travel advance
    - o Basically, you NEVER have to spend your own money on travel if you don't want to
- Booking for a guest
    - o The guest doesn't have to spend their own money
    - o The guest doesn't have to wait for reimbursement
- In all cases:
    - o The traveler gets FREE travel insurance and access to travel agent 24/7
        - ▪ Note: purchase of travel insurance is NOT reimbursable, so using Connexxus is the only way to protect your airfare without incurring out-of-pocket expenses

How to use Connexxus:

- Visit https://travel.ucop.edu/connexxus/
- Select "UC Santa Barbara"
- Sign in on the Authentication Service page with your UCSBnetID and Password. You may be asked at this point to set up a profile
- Click "Book Online Now"
- Select the "Book Now" option for BCD Travel
- From here, use the Trip Search tool to select airfare, rental car, and hotel
  - If you are booking for yourself, select "Booking for myself"
  - If you are booking for a guest, select "Book for a guest"
    - To book for a guest, you will need to know the following information:
      - Legal First Name
      - Middle Name (on ID) (if any)
      - Last Name
      - Mailing address
      - Email address
      - Gender
      - Date Of Birth
      - Known Traveler Number (if applicable)
      - DHS Redress No. (if applicable)
      - Phone
      - Email
      - Mailing address
- After you have selected the travel arrangements, proceed to the payment page
- To direct-bill the purchase to your UCSB funds, select "UC Santa Barbara Direct Bill" as the payment type
- As you click through the pages, you will have an opportunity to put in frequent flyer mileage numbers and choose seats on the flights you selected. You will eventually be asked to input a Direct Bill Authorization Number and a Department Code.
  - The Department Code is "HIST"
  - You can obtain a Direct Bill Authorization Number by emailing me the trip dates, times, destination, and purpose.
    - If you are booking for a guest, please also email me that person's full legal name and mailing address
    - Each Direct Bill Authorization Number is valid only for the specific trip for which it was issued. If you end up not using a Direct Bill Authorization Number, you must notify me.
- Once you purchase the travel arrangements using the Direct Bill Authorization Number, you will receive automated emails from Connexxus with all of your travel information
- Make sure you email me the itinerary you purchase
- When you return from your trip, please fill out a travel reimbursement worksheet, even if you do not plan to request reimbursement for any expenses

Example of a trip booked for yourself:

- Before you go on your trip:
  - Purchase airfare using Connexxus following the instructions above
  - Request a travel advance for the remainder of the expenses you think you will incur on your trip
- During your trip
  - Save your original, itemized receipts
- When you return from your trip:
  - Submit receipts and a worksheet documenting the Connexxus airfare purchase and the use of the travel advance
- Summary:
  - You didn't spend any of your own money, your airfare was protected by travel insurance, and you didn't have to wait for reimbursement after you returned

Example of a trip booked for a guest:

- When you invite a guest:
  - Request the following information from them:
    - Legal First Name
    - Middle Name (on ID) (if any)
    - Last Name
    - Mailing address
    - Email address
    - Gender
    - Date Of Birth
    - Known Traveler Number (if applicable)
    - DHS Redress No. (if applicable)
    - Phone
    - Email
    - Mailing address
  - Email Sean the guest's full name, mailing address, dates of travel, destination, and purpose of travel to obtain a Direct Bill Authorization Number
  - Follow the instructions above to use Connexxus to book travel for the guest
- While the guest is traveling:
  - If you plan to reimburse the guest for expenses besides the airfare, remind them to save their original, itemized receipts
- While the guest is in Santa Barbara:
  - Have the guest fill out and sign a travel reimbursement worksheet and leave all their original, itemized receipts with you to be submitted to me
- When the guest returns home:
  - Have the guest mail me any receipts from their return trip