ACCOUNT & BOOKING OVERVIEW

Procurement



Agenda

- What is Certify?
- Certify Account
- Booking
- Booking on behalf of others
- Group travel
- International travel



What is Certify?

- Certify is a cloud-based management solution that makes booking travel and expense reporting easy. In this new system, employees can book travel, save and submit electronic receipts, complete expense reports, and receive reimbursements quickly.
- The current system in place for the campus only allows for the online booking of travel



Links to Certify & CSUCI Travel Website

- Certify: go.csuci.edu/travel
- CSUCI Travel Website: www.csuci.edu/procurement/travel



Travel

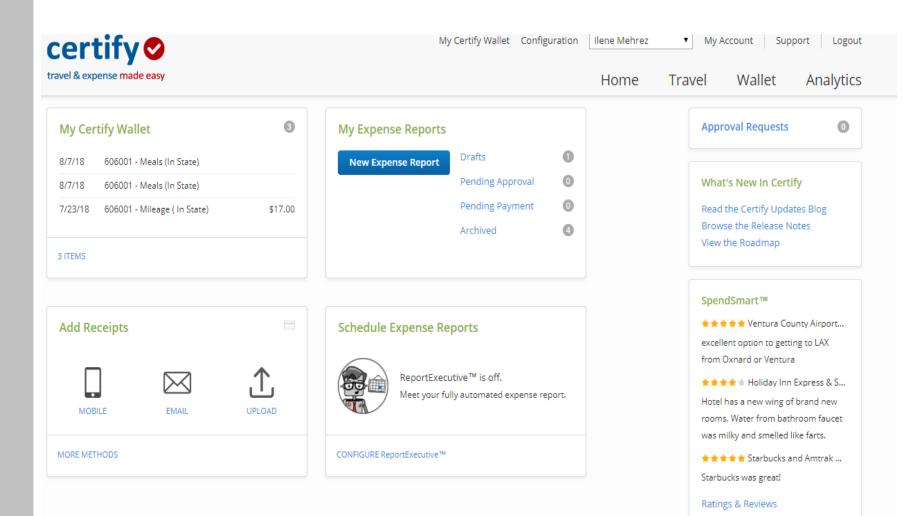












Channel Islands

Delegate Users

| | Certify Wallet Configuration Ilene Mehrez My Account Support Logout |
|-------------------|--|
| | travel & expense made easy Home Travel Wallet Analytics |
| | Manage My Delegate Users |
| Approval Requests | You can specify Delegate Users and grant them permission to use Certify on your behalf. The Delegate Users you specify will be able to switch to your account using the Change User control. When switched to your account, delegate users are |
| Receipts | able to perform the actions that you have delegated to them. Your Change User control only shows users that have delegated permissions to you. |
| Certify Wallet | Current Delegate Users |
| Expense Report | There are no Delegate Users assigned. |
| ts | Add a Delegate User |
| _ | Select a User |
| C | Grant Permission 📄 Create expense reports and submit on your behalf |
| ling | Approve expense reports on your behalf Run reports on your behalf |
| | Book travel on your behalf |
| | Full control of account |
| | |
| | Save Permissions Reset |
| | |
| | |



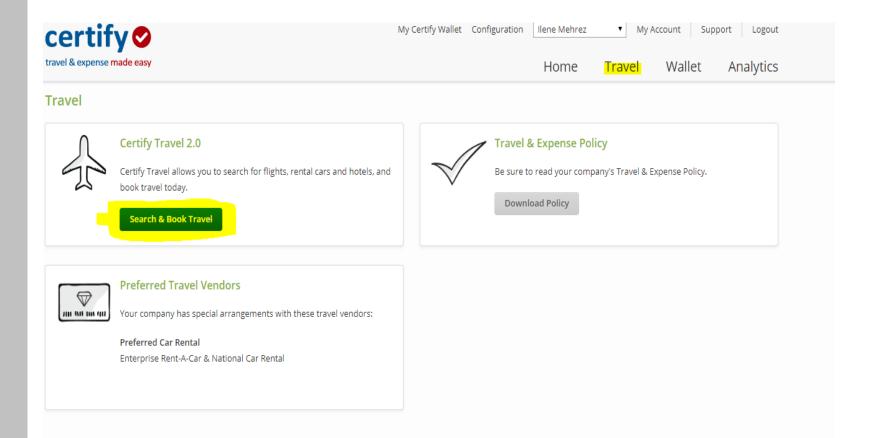
Mobile App

- The Certify Mobile App allows you to:
- View receipts and expense reports
- Upload receipts by taking a picture of the receipt or uploading one from your camera roll.
- Create and submit reimbursement requests.
- Make travel arrangements.





Booking





Airfare/Rail

| | Upcoming | Trips | | | | | | | Contact Us |
|-------------------|-------------------------|-------------|-----------------------|---------------|-------------------------|--|--|-----------------|--|
| OOK TRAVEL | TUESDAY DECEMBER 04 | | | | | | | | |
| Flights/Rail | DECEMBER 04 | | Daviat | | - | | | | |
| Hotels | | | Downt THE WE | | | AZA, ATLANTA | N Contraction of the second seco | ■ VIEW/MODIFY | |
| Cars | | | | | | | | | |
| RIP MANAGEMENT | THURSDAY DECEMBER 20 | ANDREA | COPPING | ER | | If you need assistance with your itinerary, please | | | |
| My Trips | | | LAX los angeles | \rightarrow | SFO san francisco | 6:30am | ALASKA #1925 | VIEW/MODIFY | contact our Traveler Services team. We're here 24 hours a day, 7 days a week. |
| Approve Trips | | | | | | | | | CALL (866) 284-5774 (within usa) |
| DOLS & SETTINGS | WEDNESDAY JANUARY 09 | Kari Mo | SS | | | | | | (312) 525-9805 (OUTSIDE USA) |
| My Profile | | > | BUR burbank | \rightarrow | SJC san jose | 7:00pm | SOUTHWEST #1658 | ■ VIEW/MODIFY | text (800) 795-8371 |
| Reports | FRIDAY | Kari Mo | SS | | | | | | еман AmTravSupport@AmTrav.com |
| Company Settings | JANUARY 11 | | SJC | | BUR | 5-20 | | | |
| Users & Travelers | | | SAN JOSE | \rightarrow | BURBANK | 5:20pm | SOUTHWEST #2079 | | Chat Now |
| Travel Policy | SATURDAY JANUARY 12 | Amy De | nton | | | | | | |
| MTRAV | Î | | LAX | \rightarrow | UIO | 9:00am | DELTA #194/673 | (VIEW/MODIFY) | |
| Blog | | | LOS ANGELES | | QUITO | 5.004111 | 52217X #154/015 | | |
| | | Ruben A | larcon | | | | | | |
| | | | LAX | | UIO | 0.00 | | | |
| 📞 Contact Us | | | LOS ANGELES | \rightarrow | QUITO | 9:00am | DELTA #194/673 | (≡ VIEW/MODIFY) | |

CALIFORNIA STATE UNIVERSITY

Car Rental

Two ways to rent a car:
 Enterprise.com
 Certify



- •In Certify only cars being picked up or dropped off from an airport are allowed to be reserved.
- •All other reservations can be direct billed using our enterprise account information.







Car Rentals-Preferred Vendors



Advantage

| Economy Car Hyundai Accent (or similar) — 2-4 doors | | | |
|---|------------------------|-----------------|--|
| ▲ 4 Passengers ※ A/C N Automatic Transmission Unlimited Miles ★ Counter in terminal, shuttle to car | ADVANTAGE ADVANTAGE | \$31 Per Day | |
| Pick up: Los Angeles Intl. Airport (LAX) Los Angeles, CA Drop off: O'Hare Intl. Airport (ORD) Chicago, IL | | \$2,086* total | |

Policy Status

- This booking violates these company policies: A
- Car rentals must be booked with preferred vendors National, Enterprise.



Booking on behalf of others

| Business Person | nal | | |
|---|--------------------------------|------------------------|------|
| RAVELER 2 Type a Name or Select One Below | * | | |
| Mehrez, Ilene | Book Your Flight | t | |
| (Book for Someone Not Listed) | | | |
| Abe, Christopher | Who's Traveling? | | |
| Abell, Leslie | Traveler 1: Adult | | |
| Abramiuk, Marc | • Select a Registered Traveler | • Add a New Traveler | |
| Acosta, Bianca | First | Middle (Optional) | Last |
| Adams, Virgil | | | |
| Adler, Marion | Gender | Date of Birth 😯 | |
| Admin, AmTrav | Please select • | Month v | Day |
| Aguirre, Karla | Loyalty Program #'s and Secure | e Traveler Information | |
| | | | |

Suffix

Year

None



Group/International travel

- International Travel must be approved by the University President before any reservations are made.
- Reservations for group travel can now be made online



Contact-Booking

Certify: 888-925-0510 Option2 CI: <u>purchasing@csuci.edu</u>

