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

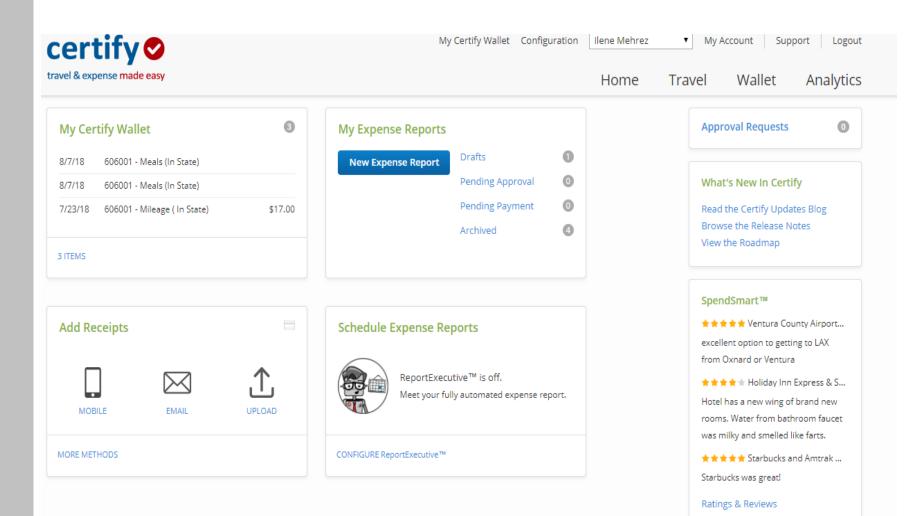












Channel Islands

Delegate Users

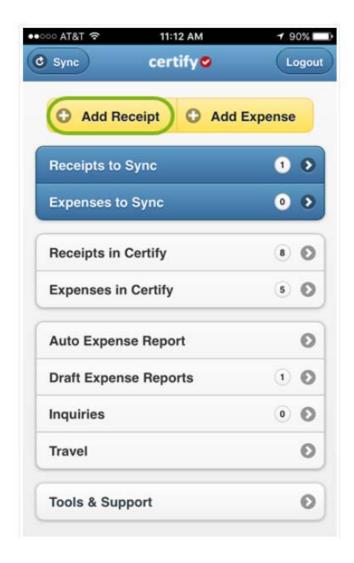
	Certify Wallet Configuration Ilene Mehrez My Account Support Logout
	travel & expense made easy Home Travel Wallet Analytics
	Manage My Delegate Users
Approval Requests	You can specify Delegate Users and grant them permission to use Certify on your behalf. The Delegate Users you specify will be able 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



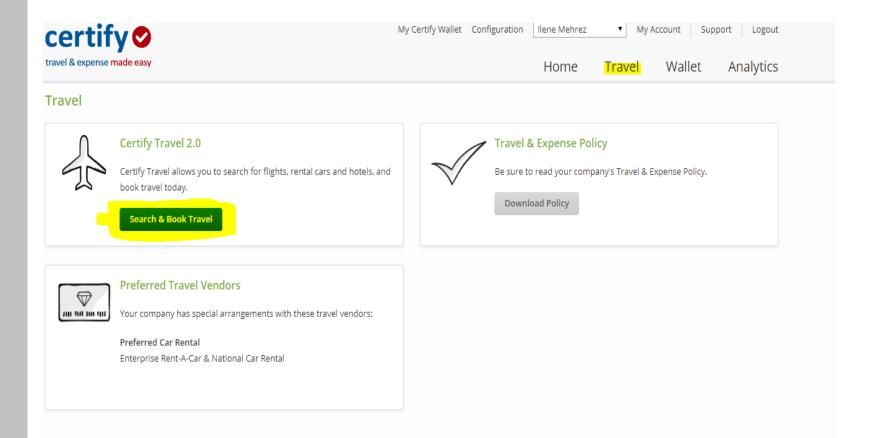
Mobile App

- 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>

