

CALIFORNIA STATE UNIVERSITY

Division of Business and Financial Affairs

Certify Travel Program Process Guide Booking

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Information

<u>Certify</u> is CSU Channel Islands new expense management system. The cloud based interface mobile application will allow employees to book travel, save and submit electronic receipts, complete expense reports, and receive reimbursement quickly. Certify partners with AmTrav allowing employees to book flights, hotels, and car reservations quickly and effortlessly.

Timeline

Employees can book business travel Monday-Thursday. Managers have 24 hours to approve travel reservations, except on holidays. Travel reservations not approved within the 24 hour period will automatically be canceled.

Process

Log into Certify: <u>https://www.certify.com/Login.aspx</u> Enter your CSUCI email address and password. Click Login.



Assigning and Managing Delegate Users

Certify allows users to designate other users with a CSUCI Certify account (student assistants are not allowed to book on behalf of employees) to act on their behalf within Certify.

Adding a Delegate

On your Certify account homepage, next to **My Account**, click the box with your name and select **Manage Delegate Users** from the dropdown menu.

certify 오 travel & expense made easy	Dan Manage Dan Manage Manage Deic	r My Account Support Logou r gate Users yel Wallet Analytic
My Certify Wallet Your wallet is empty Add receipts or expenses to your Wallet.	My Expense Reports New Expense Report Drafts Pending Approval 0 Pending Payment 0 Archived 0	Approval Requests (2) What's New In Certify Read the Certify Updates Blog SpendSmart ¹⁹⁴
Add Receipts	Schedule Expense Reports ReportExecutive [™] is off. Meet your fully automated expense report.	display. Ratings & Reviews

On the **Manage My Delegate Users** page, enter the last name and the first name of the user(s) you would like to assign **Delegate User** privileges to into the field provided

Manage My	Delegate Users
You can specify De will be able to swit able to perform th delegated permiss	legate Users and grant them permission to use Certify on your behalf. The Delegate Users you specify ch to your account using the Change User control. When switched to your account, delegate users are e actions that you have delegated to them. Your Change User control only shows users that have ions to you.
Current Delegate	e Users gate Users assigned.
Add a Delegate U	lser
Select a User	Meredith Employee (memployee@circp1.
Grant Permission	 Create expense reports and submit on your behalf Approve expense reports on your behalf
	Run reports on your behalf
	Book travel on your behalf
	Full control of account
l	Save Permissions Reset

On the **Grant Permission** area, click the checkbox for each activity you would like the **Delegate User** to have permission to do on your behalf.

Click Save Permissions.

After saving, you will see the **Delegate User** name(s) under **Current Delegate Users**, as well as a list of granted permissions based on your selection on the previous page.

alte	Delegate User	Submit	Approve	Run	Book	Full
dit	Delegate Oser	on Behalf	on Behalf	Reports	Travel	Control

Edit Delegate User Permissions

To make changes to a **Delegate User's** permissions, click the edit (pencil) icon at the left of the **Delegate User's** name. Click or deselect the checkbox for each permission you would like to grant or revoke. Select **Save Permissions** to continue.

dit	Delegate User	Submit on Behalf	Approve on Behalf	Run Reports	Book Travel	Full Contro
)×	Meredith Employee (memployee@circp1.com)	~				

Remove a Delegate User

To remove a **Delegate User**, click the red **x** to the left of the **Delegate User's** name. A popup will ask if you are sure you want to revoke permissions for the **Delegate User**. Click **Ok** to continue. The **Delegate User** you removed will no longer appear under **Current Delegate Users** or in the dropdown menu at the top of your Certify account homepage.

Current Delegate Users						
Edit Delegate User	Submit on Behalf	Approve on Behalf	Run Reports	Book Travel	Full Control	
	-					

Acting as a Delegate User

To act as delegate, the user first needs to grant you permission.

On your Certify account homepage, next to **My Account**, click the box with your name and select from the dropdown menu.

					Manage Delegate Users	rei Hunet Analytic
My Certify Wallet	0	My Expense Reports				What's New In Certify
9/27/16 DoubleTree Hotel	\$560.53	New Expense Report	Drafts	0		Read the Certify Updates Blog
9/27/16 DoubleTree Hotel	\$405.30		Pending Approval	0		
9/27/16 DoubleTree Hotel	\$68.80		Pending Payment	0		SpendSmart ¹⁷⁴
to More items			Archived	G		There are no recent ratings to display. Ratings & Reviews
Add Receipts		Schedule Expense Re	eports			
		ReportExecu Meet your full	tive ^{the} is off. y automated expense re	port.		

Confirm that you would like to change the user by clicking Yes.

Change User
You can change to the selected user to perform actions on behalf of that user. If you change to this user all your actions will be logged for audit purposes. You can change back to your own account at any time using the Current User control.
Change to User: Dan Manager (dmanager@circp1.com)
Are you sure you want to change to this user?
Yes No

You now have access to act on behalf of another user.

If the other user has not granted you permission to act on their behalf, you will receive a **Permission Denied** notification.



Booking Travel

The emailed itinerary will automatically forward into your Certify Wallet.

On your account homepage, select Travel, and then select Search & Book Travel

certify travel & expense made easy	My Account Support Logout Home Travel Wallet Analytics
Travel Certify Travel 2.0 Certify Travel allows you to search for flights, rental cars and hotels, and book travel today. Search & Book Travel	Travel & Expense Policy Be sure to read your company's Travel & Expense Policy. Download Policy

The Certify travel page will direct employees to the AmTrav page.

*Please note that **AmTrav** charges a \$29 fee for booking, cancelling, or making changes to a reservation through an **AmTrav** agent. The travel agency will charge the additional fee to the traveler's personal credit card. Travelers should be using their online Certify account or mobile app for all travel related items to avoid the \$29 agent fee.

Airfare

CSUCI business travel must follow the CI Travel Procedures and Regulations.

*To book *International Travel*, the traveler must submit a *Travel Authorization form* signed by the University President or Chief of Staff prior to booking.

*Per the <u>California Legislature AB 1887</u> the following state are subject to CA ban on state-funded and state-sponsored travel:

Alabama, Kansas, Kentucky, Mississippi, North Carolina, South Dakota, Tennessee, and Texas

To book airfare, on the left panel, click Flights

certify 🤡	Welcome Kelly C Employee
BOOK TRAVEL Flights/Rail Hotels Cars	Get Started Book a Flight Book a Hotel Edit Your Profile
TRIP MANAGEMENT My Trips TOOLS & SETTINGS	
1 My Profile	

Thursday June 08, 2017

Click Search Flights

*If another user has granted you authority to book on their behalf select the appropriate **Traveler Name** from the dropdown menu at the top right hand corner of the **Book a Flight or Train** page.

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Enter the city, town, or airport in the **From** and **To** Fields, along with the departure and return dates.

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From 406	Delta OL186	$LAX \to MCO$	9:50 pm	5:49 am Jun 14	Non-stop	4h 59m	111 131 \$23	Seat M
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Confirm the details of your selected flights. The **Policy Status** will alert you if the selection is outside of company policy.

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Adult Travel					
Adult Travel			Base Fare	Taxes	Total
	er (1)		\$330.23	\$69.97	\$400.20
				TOTAL	\$400.20
rin Det	ails			*All Fares exclusive of	baggage fees and in U.S. dol
ortland, MI	$E \rightarrow San Diego, CA I$	Monday, May	\$		
	United #4905	From:	Portland, ME (PWM)	6:00am	
	Turbo-prop	To:	Newark, NJ (EWR)	7:42am	Economy Class
Flight Operated	d by Republic Airlines Oba	United Express			
			Connection in EWR/Newark, NJ		
19Pa	United #1626	From:	Newark, NJ (EWR)	8:30am	
889)	Boeing 737-900	To:	San Diego, CA (SAN)	11:44am	Economy Clas
	United #1689 Boeing 737-800	From: To:	San Diego, CA (SAN) Washington/Dulles , DC (IAD) Connection in IAD/Washington/Dulles , DC	10:40 pm 6:34 am +	Economy Clas
		From:	Washington/Dulles, DC (IAD)	8:06am	
	United #4012 Canadair RJ 700	To:	Portland, ME (PWM)	9:42am	Economy Clas
Flight Operated	d by Mesa Airlines Dba Un	ited Express	2,2		

Once the traveler has booked their airfare, their approver will approve or disapprove the request (Business Travel Only).

Approving an Itinerary

Managers will have 24 hours to approve the booking on behalf of their department (except on holidays). Additionally, out of policy bookings will require approval by the University Controller, who will also have 24 hours to approve the booking on behalf of the university. The system will automatically cancel the itinerary if the approver does not approve the travel within the 24-hour window.

Business travel can be booked Monday - Thursday (with the exception of holidays). Approvers cannot approve bookings within the required 24-hour period if made the day before a holiday, on a holiday or on Fridays.

This section will show managers or designees how to approve an itinerary.

On your account homepage, select Travel, and then select Search & Book Travel



On the left panel, select Approve Trips.

certify 🤡	Welcome Karina Cruz Bautista
California State University Channel Islands	
BOOK TRAVEL ★ Flights/Rail	Get Started Book a Flight Book a Hotel
₽ Hotels æ Cars	Edit Your Profile
TRIP MANAGEMENT My Trips Approve Trips	
TOOLS & SETTINGS My Profile Reports Compony Settings	
Company settings Users & Travelers A Travel Policy	

To review the itinerary details, select Details button next to the itinerary in question.

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Circp1															
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Review the itinerary detail, choose to **Approve** or **Reject** the itinerary.

certify 🧐	Trip Details		
BOOK TRAVEL	Trip Summary		
Flights/Rail	B	ooking Number:	1726403798
Hotels		Trip Title:	San Diego
e Cars	Airline Confirm	nation Numbers:	JPJWE4 (UA)
TRIP MANAGEMENT		Status:	NEEDS APPROVAL
Approve Trips Approve Trips OOLS & SETTINGS My Profile	Traveler Names 1 Kelly C Employee Itinerary		
Reports	Portland, ME \rightarrow San Diego, CA		September 25, 2017 Cancel
h Company Settings	•	Departs:	Portland, ME (PWM) Mon, Sep 25 — 5:45am
Travel Policy	Southwest #563 Boeing 737-700 Duration: /b.30m	Arrives:	Baltimore, MD (BWI) Mon, Sep 25 — 7:15am
	Database 21 Juni	Seat(s):	Economy Seat Info 🕐
		Connection	in Baltimore, ND
	8	Departs:	Baltimore, MD (BWI) Mon, Sep 25 – 8:25am
	Southwest #1581 Boeing 737-800 Duration: 5h 20m	Arrives:	San Diego, CA (SAN) Mon, Sep 25 - 10:45am (Terminol 1)
C contact Us			
🔒 Log Out	Would you like to Approve or Reject this	i trip? 🗸 🗸	pprove × Reject

If the itinerary is **Approved**, the itinerary will be ticketed and the booking will be completed. If **Rejected**, the itinerary will be cancelled. If approver takes no action on the approval request after 24 hours, the system will cancel the itinerary.



Car Rentals

CSU Channel Islands preferred Car Rental Company is Enterprise Rent-a-Car or National.

On your Certify account homepage, select Travel, and then select Search & Book Travel



On the left panel, click Cars.



Certify will ONLY allow travelers to book car rentals they are picking up or dropping off at airport locations. All other Enterprise Rent-a-Car reservations will need to be booked via the Enterprise website (see <u>Enterprise</u> <u>Rent-a-Car Guidelines</u>).

If you are picking up and dropping off the car at the same airport, click **Same Location**. If you plan to leave from a different airport, click **Different Location**. Enter the date range, the time, and choose Enterprise or National as the preferred vendor.

Click Search

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28																					

Select a rental car form the listed results. Filter the results by Car Type or Car Vendor.

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Compact	4 J ¹ 1 D	
Te	* ® N	A [°] 52/day
Standard SUV	rminal A/C Automatic	Miles Select
Convertible Midsize – Toyota Corolla (or similar)	Doors: 2-4 Passengers	: 2 Bags: 2 total price: \$14
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ar Vendors Standard – Chrysler 200 (or similar)	Doors: 2-4 Passengers	:: 4 Bags: 4 total price: \$14
All Vendors Preferred Vendors	8 x [†] x 10	
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Alamo Ter	rminal A/C Automatic	Miles Select
Thrifty Fconomy – Chevy Spark (or similar)	Doors: 2 Passengers	: 2 Bags: 2 total price: \$14
Enterprise		
Hertz		
Avis	* 🔅 N	A 353/day
National Ter	rminal A/C Automatic	Unlimited Miles Select
Budget		total price: \$14
Compact — Nissan Versa (or similar)	Doors: Z Passengers	: z bags: z
	1 32 9	A Scott

Confirm the details of your selection. The **Policy Status** will alert you if you are out of policy. Click **Continue**.

When your approver approves the reservation, you will receive an email confirmation.

Rail Reservations

On your Certify homepage, select Travel, and then select Search & Book Travel.



On the left panel, click Flights/Rail

certify 🤡	Welcome Kelly C Employee
Circp1	
BOOK TRAVEL	Get Started
★ Flights/Rail	Book a Flight
🛱 Hotels	Book a Hotel
😞 Cars	Edit Your Profile
TRIP MANAGEMENT	
🏨 My Trips	
TOOLS & SETTINGS	
💄 My Profile	

Enter a city, town, or station in the **From** and **To** fields, along with the departure and return dates. Using the Airline dropdown menu, select **Amtrak**.

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Confirm the details of your selection. The **Policy Status** will alert you if you are out of policy. Click **Continue**.

Flights Revie	ew			Business Personal
Trip Details				
Newark/Penn Statio	on, NJ \rightarrow Boston/South St	ation, MA		Tue, Aug 1, 2017
	Amtrak #190	From: Newark/Penn S	tation, NJ (nwk)	6:22am
	Economy	To: Boston/South S	tation, MA (bos)	11:05am
Boston/Back Bay St	tation, MA $ ightarrow$ New York/Per	nn Station, NY		Sat, Aug 5, 2017
	Amtrak #195	From: Boston/Back Ba	y Station, MA (bby)	6:45am
	Economy	To: New York/Penn	Station, NY (nyp)	10:50am
Adult Traveler	Travelers?	\$98.00	\$0.00	\$98.00
Change Number or Type of	Travelers?		TOTAL *All Fares exclusiv	\$98.00 e of <u>baggage fees</u> and in U.S. dollars
Policy Status				
This booking is in	n policy.			
	Ple	ase double-check your itinera	ry details before proceeding.	
		Contin	ue>	

Click **Continue** to complete the reservation.

Hotel Reservations

On your homepage, select Travel, and then select Search & Book Travel.

certify 😎 travel & expense made easy	My Account Support Logout Home Travel Wallet Analytics
Travel Certify Travel 2.0 Certify Travel allows you to search for flights, rental cars and hotels, and book travel today. Search & Book Travel	Travel & Expense Policy Be sure to read your company's Travel & Expense Policy. Download Policy

On the left panel, select Hotels.

certify 🤣	Welcome Kelly C Employee
BOOK TRAVEL	Get Started
🛧 Flights/Rail	Book a Flight
A Hotels	Book a Hotel
🙈 Cars	Edit Your Profile
TRIP MANAGEMENT	
💼 My Trips	
TOOLS & SETTINGS	
💄 My Profile	

Enter a city, address, or airport in the location fields provided. Enter a check in and check out date, and then select the number of rooms, number or adults, number of children, and hotel class form the dropdown menus, and then click **Search**.

Vhe	en 05	/10/2	2015				05/15	/201	5			5 n	ights							
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5	6	7	8	9		11	3	4	5	6	7	8	9	7	8	9	10	11	12	13
12	13	14	15	16	17	18	10	11	12	13	14	15	16	14	15	16	17	18	19	20
19	20	21	22	23	24	25	17	18	19	20	21	22	23	21	22	23	24	25	26	27
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0	Pref	erre	d Pro	pert	ies O	nly														

Select a hotel form the search results. Filter by preferred hotel, price per room, hotel name, hotel class, and amenities.

Escondido		Page 1 of 8	376 hotels found sorted by	Best
San yiego Cocole Map data 620 W	585596 vieci		Courtyard by Marriott San Diego Downtown	per night from \$199
Preferred Hotels		YE	Hotel Details	Select
 Preferred only 	~	- Without -	Paradise Point Resort & Spa	par night from
Price per room		65000	1404 Vacation Rd, San Diego CA	\$152
🗐 under \$118	(27)	Care and a second	Beach Cities	Select
§118 to \$139	(26)		Hotel Details @@@@@@@ 2645 Guest Reviews	
\$139 to \$171	(28)			
S171 to 5208	(27)	1 1 1'	Best Western Plus Island Palms Hotel & Ma	per night from
Over 3200	(43)	TT- The	2051 Shelter Island Dr, San Diego CA	\$152
		A CONTRACTOR	Beach Cities	Salact
Hotel Name			Hotel Details (000000 2021 Guest Reviews	
	Go	-	Manchester Grand Hyatt San Diego	per night from
		- E.G.	1 Market Pl, San Diego CA	\$251
Hotel Class			Downtown - San Diego Intl Airport (SAN)	Select
*****	(5)	ALL AN ANGUNATION	Hotel Details @@@@@@ 3557 Guest Reviews	-
******	(42)			
	(128)		Town and Country Resort & Convention Ce.	per night from
	(11)	Rest Barris	500 Hotel Cir N, San Diego CA	\$120
A DE DE DE DE DE		A STATE OF A	Mission Valley - Old Town	Select
Amenities			Hotel Details 🚳 🛞 🕬 🕬	
Child Care	(33)		****	per night from
🗊 Internet	(272)	Trainer.	Omni San Diego Hotel 675 L St. San Diego CA	\$250
Fitness Center	(187)	Ballander Ball Pillin	Downtown - San Diego Intl Airport (SAN)	+200
Pet Friendly	(159)	A DECEMBER OF A DECEMBER OF	Hotel Details (000000) 2446 Guest Reviews	Select
Restaurant	(134)			
			Hotel Indigo Gaslamp Quarter	per night from
		ALL COURTERS OF STA	500 Bib Ave Tax Direc CA	:133

Select the Room Type and click Book.

Confirm the details of your selection. The Policy Status will alert you if your booking is out of policy.

Per the CSUCI Travel Policy the in state and out-of-state per night lodging rate is \$275 per night before taxes or fees. Expenditures over the allowable limit are the responsibility of the traveler unless they receive a pre-approved documented exception from the University Controller.

Enter **payment** information. Hotel reservations for business travel are reimbursable to the traveler after the trip.

Click **Book Now** to complete the reservation.

Canceling an Itinerary

Travelers must make any necessary changes or cancelations to any booked itinerary within 24 hours of initial purchase. Itineraries canceled 24 hours after initial booking may incur cancellation fees.

On your homepage, select Travel, and then select Search & Book Travel.



On the left panel, select My Trips.

certify 🛛	Welcome Kelly C Employee
Circp1 BOOK TRAVEL Flights/Rail Hotels Cars TRIP MANAGEMENT My Trips	Get Started Book a Flight Book a Hotel Edit Your Profile
TOOLS & SETTINGS	

Locate the itinerary and select Details.

certify 🕏	Trips				TRAVELER (All Travelers	i) –
Circp1						
BOOK TRAVEL	Booking #	Title	Dates *	Traveler(s)	Status	
🛧 Flights/Rail	1726403798	San Diego	Sep 25, 2017	Employee, Kelly C	PENDING	Details
🛱 Hotels						
🙈 Cars						
TRIP MANAGEMENT						
💼 My Trips						
TOOLS & SETTINGS						
💄 My Profile						

In the Trip Summary section, select Cancel Itinerary.

certify 🧟	Trip Details		
Circp1			
BOOK TRAVEL	Trip Summary		
★ Flights/Rail	Booking Number:	1726403798	Email Itinerary
R Cars	Trip Title:	San Diego	Add to Calendar
TRID MANAGEMENT	Airline Confirmation Numbers:	JPJWE4 (UA)	Cancel Itinerary
💼 My Trips	Status:	PENDING 🕖	If you need assistance with your itinerary, please call our Traveler
TOOLS & SETTINGS	Traveler Names		Services team at (312)525-9805 24 hours a day, 7 days a week.
🌲 My Profile	1 Kelly C Employee		

Confirm the portion of the itinerary you would like to cancel and select, Yes, Cancel Selected Item(s).

Sele	ect it	inerary item(s) to can	ncel 💽
Once	e items	are cancelled, this process cannot be	undone!
	*	Portland, ME to San Diego, CA (Septer	mber 25)
	*	San Diego, CA to Portland, ME (Septer	nber 28)
		io, Go Back Yes, Cancel Selecte	d Item(s)

Employment Separation

In the event that an employee separates from the campus their Certify account will be closed. Managers are responsible for cancelling any pending travel for that employee. The department may incur additional fees if canceling reservations or making changes to reservations of an employee that is separating from employment.

Glossary

Certify Wallet: Cloud-based wallet where all captured receipts are stored before user can add them to an expense report.

AmTrav: CSUCI's new travel agency

Delegate User: Person designated to book travel on behalf of others.