

ACCOUNT & BOOKING OVERVIEW

Karina Cruz

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



Booking Travel



Reporting Expenses



Travel Policies



My Certify Wallet 0

Your wallet is empty

Add receipts or expenses to your Wallet.

0 ITEMS

My Expense Reports

New Expense Report

- Drafts 0
- Pending Approval 1
- Pending Payment 0
- Archived 0

What's New In Certify

[Read the Certify Updates Blog](#)

SpendSmart™

★★★★★ Marriott, Anaheim, CA
Beautiful Hotel and wonderful staff!!!

[Ratings & Reviews](#)

Add Receipts ☰



MOBILE



EMAIL



UPLOAD

[MORE METHODS](#)

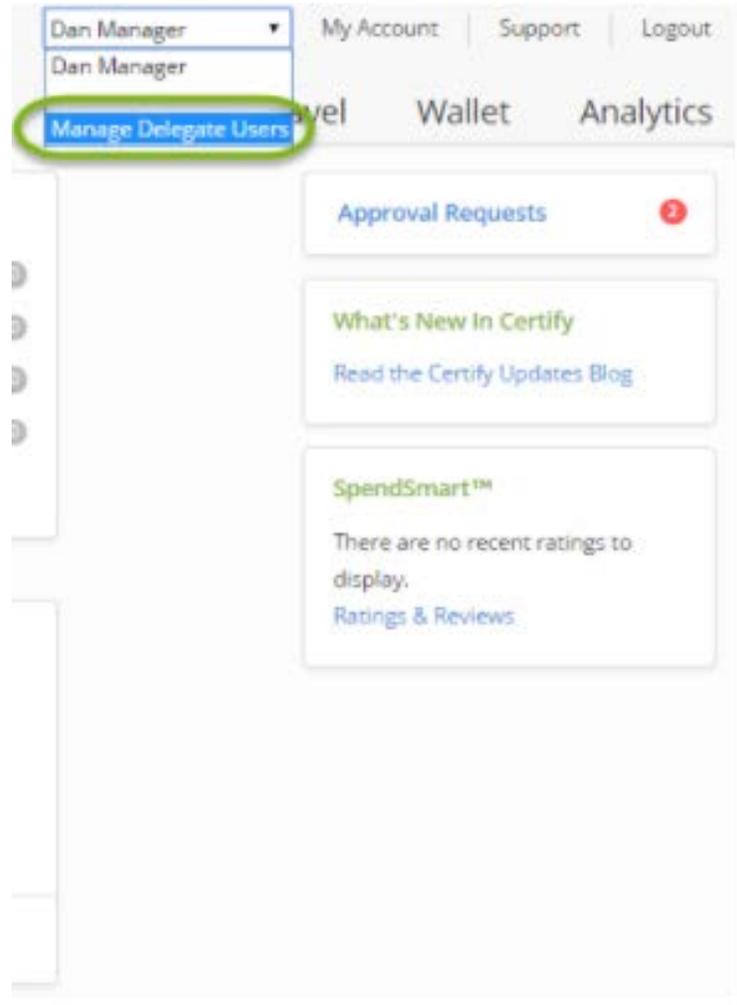
Schedule Expense Reports



ReportExecutive™ is off.
Meet your fully automated expense report.

[CONFIGURE ReportExecutive™](#)

Delegate Users



The screenshot shows the 'Manage My Delegate Users' page. At the top, there is the Certify logo and the tagline 'travel & expense made easy'. On the right, there are links for 'My Certify Wallet' and 'Configuratio'. The main heading is 'Manage My Delegate Users'. Below the heading, there is a paragraph explaining that users can specify Delegate Users and grant them permission to use Certify on their behalf. The 'Current Delegate Users' section shows 'There are no Delegate Users assigned.' The 'Add a Delegate User' section includes a 'Select a User' dropdown menu, a 'Grant Permission' section with four checkboxes for 'Create expense reports and submit on your behalf', 'Run reports on your behalf', 'Book travel on your behalf', and 'Full control of account', and two buttons: 'Save Permissions' and '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

The screenshot shows the Certify web application dashboard. At the top, there is a navigation bar with the Certify logo (a red checkmark in a circle) and the tagline "travel & expense made easy". To the right of the logo, there are links for "Configuration", "Karina Cruz Bautista" (with a dropdown arrow), "My Account", "Support", and "Logout". Below this, there is a secondary navigation bar with "Home", "Travel" (highlighted in yellow), "Wallet", and "Analytics".

The main content area is divided into several sections:

- My Certify Wallet:** A card with the heading "My Certify Wallet" and a notification icon. It contains the text "Your wallet is empty" and "Add receipts or expenses to your Wallet." Below this, it shows "0 ITEMS".
- My Expense Reports:** A card with the heading "My Expense Reports" and a "New Expense Report" button. It lists categories with counts: "Drafts" (0), "Pending Approval" (1), "Pending Payment" (0), and "Archived" (0).
- What's New In Certify:** A card with the heading "What's New In Certify" and a link "Read the Certify Updates Blog".
- SpendSmart™:** A card with a 5-star rating and the text "Marriott, Anaheim, CA" and "Beautiful Hotel and wonderful staff!!!". It includes a link "Ratings & Reviews".
- Add Receipts:** A card with the heading "Add Receipts" and three icons: "MOBILE" (phone), "EMAIL" (envelope), and "UPLOAD" (arrow). It includes a link "MORE METHODS".
- Schedule Expense Reports:** A card with the heading "Schedule Expense Reports" and a cartoon character icon. It contains the text "ReportExecutive™ is off. Meet your fully automated expense report." and a link "CONFIGURE ReportExecutive™".

Travel

The "Certify Travel 2.0" card features an airplane icon. The text reads: "Certify Travel 2.0" and "Certify Travel allows you to search for flights, rental cars and hotels, and book travel today." Below the text is a yellow button with the text "Search & Book Travel".

The "Travel & Expense Policy" card features a checkmark icon. The text reads: "Travel & Expense Policy" and "Be sure to read your company's Travel & Expense Policy." Below the text is a grey button with the text "Download Policy".

The "Preferred Travel Vendors" card features a diamond icon. The text reads: "Preferred Travel Vendors" and "Your company has special arrangements with these travel vendors:". Below this, it lists "Preferred Car Rental" and "Enterprise Rent-A-Car & National Car Rental".

Airfare/Rail

The screenshot shows the Certify web application interface. On the left is a dark blue sidebar with the Certify logo and a navigation menu. The main content area is light blue and displays a welcome message for Karina Cruz Bautista, followed by sections for 'Getting Started' and 'Upcoming Trips'.

certify ✓

California State University
Channel Islands

BOOK TRAVEL

- ✈ Flights/Rail
- 🏨 Hotels
- 🚗 Cars

TRIP MANAGEMENT

- 📅 My Trips
- ✅ Approve Trips

TOOLS & SETTINGS

- 👤 My Profile
- 📊 Reports
- ⚙ Company Settings
- 👥 Users & Travelers
- 📄 Travel Policy

Welcome Karina Cruz Bautista

Getting Started

- [Book a Flight](#)
- [Book a Hotel](#)
- [Edit Your Profile](#)

Upcoming Trips

No Trips Scheduled

Hotel

Find a Hotel

Destination

Anaheim, CA

Dates

Apr 3 - Apr 5

April 2018							May 2018							June 2018						
Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa
1	2	3	4	5	6	7	1	2	3	4	5			1	2	3	4	5	6	7
8	9	10	11	12	13	14	6	7	8	9	10	11	12	8	9	10	11	12	13	14
15	16	17	18	19	20	21	13	14	15	16	17	18	19	15	16	17	18	19	20	21
22	23	24	25	26	27	28	20	21	22	23	24	25	26	22	23	24	25	26	27	28
29	30						27	28	29	30	31			24	25	26	27	28	29	30

1 Room

1 Adult

No Children

Hotel Chain

Marriott

Hotel Class

(All)

Name Contains

Search Hotels

Anaheim, California

Tue, Apr 3 - Thu, Apr 5

Business Personal

TRAVELER Cruz Bautista, Karina

3 out of 121 hotels found
[Clear Filters](#)

Map

Display Options

- Preferred Only
- In Policy Only
- Hide Sold Out Hotels

Hotel Name

Search name or brand

Hotel Chain

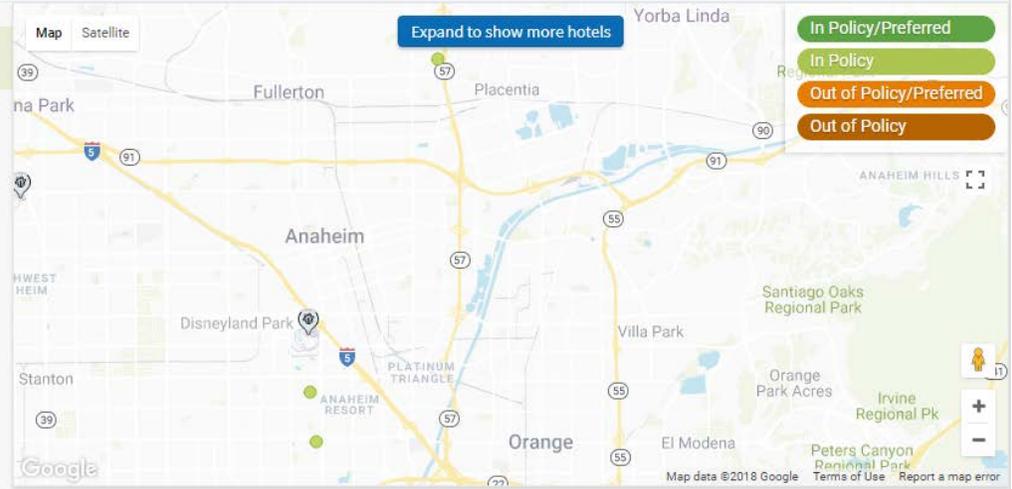
Marriott

Star class

- ★★★★★ (1)
- ★★★★☆ (2)
- ★★★☆☆
- ★★☆☆☆
- ★☆☆☆☆

Price per room

- under \$98
- \$98 to \$121
- \$121 to \$143



3 out of 121 hotels found
[Clear Filters](#) Distance



★★★★★ 2103 Reviews
Anaheim Marriott Hotel
 700 W Convention Way, Anaheim, CA 92802

\$170 per night



★★★★★ 336 Reviews
Fullerton Marriott at California State University
 2701 Nutwood Ave, Fullerton, CA 92831

\$149 per night

3.2 miles away

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.



Enterprise

★ PREFERRED



Car Rentals- Preferred Vendors



Advantage

Economy Car

Hyundai Accent (or similar) — 2-4 doors

4 Passengers ✪ A/C ✪ Automatic Transmission

Unlimited Miles

✪ Counter in terminal, shuttle to car

Pick up: Los Angeles Intl. Airport (LAX) Los Angeles, CA
Drop off: O'Hare Intl. Airport (ORD) Chicago, IL

ADVANTAGE
RENT A CAR

\$31
Per Day
\$2,086* total

Policy Status

 This booking violates these company policies:

- Car rentals must be booked with preferred vendors National, Enterprise.

Booking on behalf of others

Business Personal

TRAVELER  | Type a Name or Select One Below

Cruz Bautista, Karina

(Book for Someone Not Listed)

Abe, Christopher

Abell, Leslie

Abramiuk, Marc

Acosta, Bianca

Adams, Virgil

Adler, Marion

Alamillo, Jose

Book Your Flight

Who's Traveling?

Traveler 1: Adult

Select a Registered Traveler Add a New Traveler

First **Middle (Optional)** **Last** **Suffix**

Gender **Date of Birth ?**

[Apply Unused Ticket](#)

[Loyalty Program #'s and Secure Traveler Information](#)

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

Book a Flight or Train TRAVELER

Round Trip One Way Multi City

From To

Dates Anytime Anytime

March 2018 **April 2018** **May 2018**

Su	Mo	Tu	We	Th	Fr	Sa
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

Su	Mo	Tu	We	Th	Fr	Sa
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30					

Su	Mo	Tu	We	Th	Fr	Sa
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31		

Adults More options?

Cabin

Airlines **Stops** **Refundable**

Book Your Flight

Who's Traveling?

Traveler 1: Adult

Select a Registered Traveler Add a New Traveler

Traveler Name

Gender **Date of Birth**

[Apply Unused Ticket](#)
[Loyalty Program #'s and Secure Traveler Information](#)

Traveler 2: Adult

Select a Registered Traveler Add a New Traveler

Traveler Name

Traveler 3: Adult

Select a Registered Traveler Add a New Traveler

Traveler Name

Contact – Booking

Certify: 888-925-0510 Option 2

CI: karina.cruz@csuci.edu