Certify: Solution Overview

Accounts Payable

Financial Services
Agenda

• Implementation Plan
• Solution Overview
• Quick Look
• Key Features
• Questions
Implementation Timeline

• **Pilot Group**: Division of Administration and Finance
  • **Pilot Group Rollout**: April 10, 2019
• **University Wide Rollout**: August 26, 2019
## Overview

### What is Certify?
- Certify is a cloud-based management solution that makes booking travel and expense reporting easy!

### What’s in it for me?
- Paperless
- Timesaving
- Online Submission and Approval
- Mobile Friendly
- User Friendly
- Quicker Reimbursement
Quick Look

Link to video
Key Features

- Travel Booking
- Receipts
- Expense Reports
- Policy Flags/Travel Policy
- Built in Approval Workflow
- Delegate users
- Analytic Reports
- Training
- Resources
Travel Booking

Certify Travel 2.0

Certify Travel allows you to search for flights, rental cars and hotels, and book travel today.

Search & Book Travel

- Book airfare, hotel and car rentals using Certify Travel
- Easy to use
- Similar to placing on-line travel reservations
Receipts

Receipts electronically captured (no paper submissions):

- Mobile
- Email
- Upload

Campus-paid transaction receipts upload automatically for:

- Certify-booked Airfare
- Enterprise
- Global Travel
Expense Report

Expense Report Name: Certify Training 06/05-06/07/2019

Billable to Client: No

Start Date: 6/5/2019

End Date: 6/7/2019

Description: Attended Certify training in San Diego, CA to learn more about being a Certify System Admin.
## Policy Flags

### Expenses

<table>
<thead>
<tr>
<th>Expense</th>
<th>Date</th>
<th>Category</th>
<th>Details</th>
<th>Amount</th>
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<td></td>
<td>8/6/2019</td>
<td>606001 Travel...</td>
<td>![Warning]</td>
<td></td>
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</tbody>
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**Details**

- Total Non-Reimbursable
- Total Reimbursable

- ![Warning] Maximum daily amount exceeded.
  - Max Daily Amount is: 55.00 USD.
Travel Policy

• Travel Policy has not changed
  • $55 Daily Meal Limit
  • $275 Hotel Rate per night before taxes & fees
  • Lunch not reimbursable for same day travel
• Both travelers and approvers should familiarize themselves with the travel policy
Approval Workflow

Submitter → First-Level Approver → Second-Level Approver → Addt’l Approver → AP
(Fund) (Optional)
Delegate Users

- Create expense reports on your behalf
- Book travel on your behalf
- On Vacation? Approve expense reports on your behalf

- Traveler still submits his/her own expense report. But, can have assistance with its preparation.
Analytic Reports

- Status of Expense Report
- Travel Archives
- Expense Trends
  - For self
  - For department, if Approver
Training

- Hands-on training begins week of August 26th
- Sign up for training today
- We have more exciting features to share with you
Resources

HAVE CERTIFY QUESTIONS?

CALL 888-925-0510, Option 2 (No Charge)

• Certify Support (24-hour live support Monday – Friday)
• In case a Support Code is needed when contacting Certify Support, please log in to your Certify account, then click on the Support Link in the upper right corner.

TRAVEL BOOKING ASSISTANCE (with FEE): The Travel Booking site has a $29 fee if you call for booking assistance regarding your travel itinerary. This includes LiveChat, (866) 284-5774 within USA; or (312) 325-9805 outside USA; or text support@AmTrav.com.
Resources

OTHER HELPFUL INFO

• CSUEB Travel: www.csueastbay.edu/travel

• Certify Training: Certify Training Camp
Questions?