

Certify: Solution Overview

Accounts Payable

Financial Services



CAL STATE
EAST BAY



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?

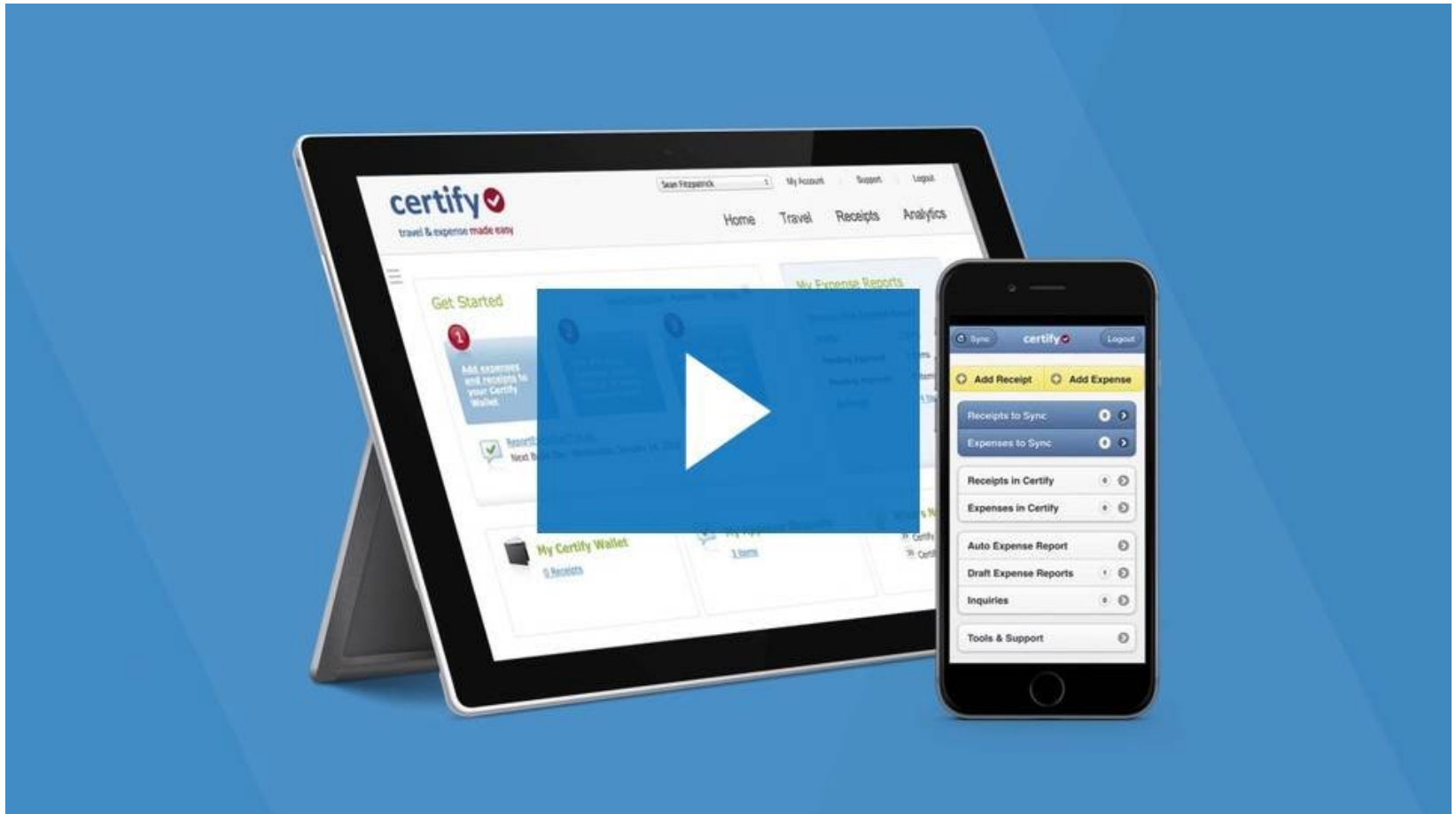
- Certify is a cloud-based management solution that makes booking travel and expense reporting easy!

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

My Expense Reports

[New Expense Report](#)





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

Expense Report Name	<input type="text" value="Certify Training 06/05-06/07/2019"/>
Billable to Client	<input type="checkbox"/>
Start Date	<input type="text" value="6/5/2019"/>
End Date	<input type="text" value="6/7/2019"/>
Description	<input type="text" value="Attended Certify training in San Diego, CA to learn more about being a Certify System Admin."/>



Policy Flags


Expenses

Expense	Date	Category	Details	Amount	Reim.	Reim. Amo
 	8/6/2019	606001 Travel...	 			

Total Non-Reimbursab
Total Reimbursab

Details



 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
Approver**

**First-Level
Approver**

**Second-Level
Approver
(Fund)**

**Addt'l
Approver
(Optional)**

AP



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](#)



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Questions?