

Annexure C

Self-Booking Tool (SBT) Questionnaire

For the Provision of Travel Management Services to the CSIR for a period of Five (5) years

RFP No. 3569/29/05/2023

	Questions	Response Window
Generic System Questions:		
1	Define the services you offer via your SBT? <i>No longer than two paragraphs.</i>	
2	Expand upon the ownership of the SBT. Who owns the tool? Is it outsourced or an in-house product?	
3	What sort of support does the SBT offer to bookers and authorisers.? And is there a cost involved?	
4	Indicate your SBT footprint by providing three contactable reference clients.	
5	Can the entire trip be reported on, including meal allowances, other travel (Not booked by SBT) expenses and forex?	

Technology		
6	Is the SBT accessible via smart phones?	
7	What technical requirements are needed to be in place for the system to operate?	
8	The CSIR needs the SBT to be tailor made. Can your system be adapted and at what cost?	
9	Does the SBT directly integrate with Full Service and Low-Cost Carriers?	
10	With which GDS do you operate and integrate?	
11	How does the SBT directly integrate with Bed and Breakfast establishments? Elaborate?	
12	Provide a list of suppliers that your SBT integrates directly with (not via the GDS).	
13	Is there a mobile application linked to the SBT? Describe how the mobile app integrates with your technology?	

	Travel Policy	Response Window
14	Can the SBT have different policy set-ups?	
15	Can the SBT show out of policy vendors, but still be bookable by the user?	
16	How are in policy and out of policy options differentiated on the system?	
	Booking Process	Response Window
17	If an out of policy vendor reservation is authorised, how is this information captured into the SBT?	
18	Explain the quoting system used by your SBT	
19	Expand upon the Error Management within your SBT	
20	Is the system completely automated? Or is a consultant ticketing after approval?	
21	Are travel documents produced electronically?	
22	Can the system upload other documents (e.g. internal documents)?	
23	How do you indicate to the travel booker that they are not selecting the cheapest option?	

24	Will the tool reports on missed savings?	
	Navigation	Response Window
25	How do you indicate to the approver that there are missed savings on the travel request?	
26	Does the SBT cater for multi-leg bookings?	
27	Does the SBT allow the end user to hold seats?	
28	How is “no availability” displayed?	
29	Can offline bookings be incorporated into the booking process?	
30	Can users easily navigate between sectors?	
31	How is a new cost centre added to the SBT data base? How soon can this amendment be done? What is the process to follow?	
32	Do consultants have to issue the tickets and vouchers first before they are available online?	
33	Can users make the reservation offline and then transfer to the SBT?	

34	Can consultants make the reservation online and offline?	
35	While a trip planned is pending approval, are the proposed reservations held with the suppliers	
36	Can reservation changes be facilitated online for all vendor categories?	
37	Are all category changes made tracked?	
38	How does the SBT deal with unused tickets?	
39	How does the SBT manage the traveller profiles?	
40	Can users and travel bookers be limited to certain cost centres / projects?	
41	What levels of administrative rights are there?	

	Workflow approval	Response Window
42	How many approvers may be used in one Department?	
43	Does the SBT support SMS / mobile approval?	
44	If the booking requires a change will it automatically revert to Approver?	
45	How are Emergency Bookings processed?	
46	How does the approver make an informed decision when approving?	
47	Does the SBT allow for Super Approval? Explain the process in detail.	
	Transfers	Response Window
48	Can the SBT systematically facilitate transfer reservations with any vendor?	
49	Outline how a reservation that has been secured outside of the system can be captured into the system for complete itinerary viewing and reporting purposes.	
50	Can the SBT allow multiple travellers in a transfer?	

	Accommodation	Response Window
51	Outline how the SBT systematically facilitates accommodation reservations with Bed and Breakfast establishments not presented on any open central reservation system. (B&B)	
52	Outline how a reservation that has been secured outside of the system, due to availability constraints of an accommodation vendor that is accessible via the system, can be captured into the system for complete itinerary viewing and reporting purposes.	
53	Can the SBT systematically facilitate accommodation reservations with non-listed B&B vendors?	
54	Elaborate on how a bill-back facility will be supported.	
55	How do you list a new vendor on the system?	
56	Can the SBT have multiple accommodation bookings in one transaction, i.e. different hotels for different travellers or different hotels for one traveller in one booking?	
57	Does your SBT have an information page with hotel details and live Google map?	

58	Does the SBT have any user feedback on properties?	
59	Does the SBT support photos of properties?	
60	Can the SBT provide separate quotes for dinner, bed and breakfast?	
61	Is it clear when breakfast or dinner is included in the price quoted for “bed”?	
	Car Rental	Response Window
62	Can multiple pick up and drop off locations be supported within the SBT?	
63	Can the system have multiple cars booked for multiple travellers in a single booking?	
64	How does the system support guaranteed availability when there are availability constraints at a car rental agency that is accessible via the system?	
65	Can extras like GPS, additional drivers, etc. be booked on the system?	
66	How does a reservation that has been secured outside of the system get into the system?	
67	How does an invoice for car rental get compared to the order within the system?	

	Air	Response Window
68	Can the SBT systematically facilitate name changes to low cost carrier tickets?	
69	How are cancelled flight tickets managed systematically?	
70	How are unused flight tickets tracked and applied for reuse systematically?	
71	Does the system allow for multiple flights with one booking?	
72	Does the system allow for a return flight to be booked on two separate airlines for departure, and return, in one booking?	
73	How does the SBT control specific requirements for multiple travellers?	
74	How does the system / consultant facilitate pre-seating?	

	Reporting	Response Window
75	Does the system provide real time reporting?	
76	Is the reporting provided available to us directly? Do the reports attract a fee?	
77	What reports are provided?	
78	Are the reports customisable?	
79	Are the reports in Excel or PDF?	
80	Does the system offer a report to indicate the savings lost due to the booking being made/not being made within a certain timeframe before departure (based on historical values for the same transaction)?	
81	Does the system offer reporting of automated refund tracking as well as unused ticket reporting	
82	Does your system have a report that shows future travel?	
83	Does your system have a report that indicates number of bookings per booker?	
	Provide examples of your reports that will be submitted	

	Fulfilment	Response Window
84	Outline the fulfilment process. Where would human intervention be necessary and how would this impact on the cost?	
	Training	Response Window
85	Do you provide training on the SBT?	
	Billing Process	Response Window
86	Explain the billing process on a 30 day payment period.	
87	Explain the billing process with regards to a Travel lodged card.	
88	Are bill-backs integrated into the system for reporting purposes? How?	
89	Do accommodation bill backs to the Travel lodged card attract merchant fees? And who is liable for the cost if there are fees?	
	Data Security	Response Window
90	How is all CSIR data secured? Elaborate.	
	System Integration	Response Window
91	It is a requirement that the SBT integrates with the Oracle EBS set up. CSIR uses an Oracle Based Procurement System. It is of utmost importance that the online booking tool	

	can completely integrate with Oracle EBS. Is your system able to integrate?	
92	Each cluster / portfolio in the CSIR has cost centre numbers, and these have to be available per cluster / portfolio on the SBT. Can it be incorporated?	
	Further Requirements of the electronic solution	Response Window
93	What is the average and maximum actual response time for a complete travel booking, which includes flight, road transport and accommodation?	
94	Does the system provide an historical record/audit trail of each administrative change that occurs within the application?	
95	Does the system have the ability to assign specific tasks/functions to specific administrative roles?	
96	Is the system able to securely authenticate and encrypt any interface to or from the CSIR system?	
97	Does the system allow for a reason for travel to be captured at the time of making the booking?	
100	Explain how you ensure the cheapest Fare for international complex routings?	
101	Is your Self Booking Tool able to facilitate Forex requests and approval?	

102	Can the system have multiple approvers for Forex?	
103	How do you store traveller profiles and how do you keep them up to date?	
	Duty of Care	Response Window
104	Indicate how your organisation tracks the whereabouts of the travellers?	
105	How do you assist CSIR to evacuate travellers from a Self-Booking tool environment? What is the process of getting them out of the relevant country?	