OUTLINE OF CURRENT SITUATION:
In many areas of the University staff are required to travel regularly and this necessitates completing the Travel Authority form. The process in its present state (see Appendix 1) is complex, time consuming and is not a fully streamlined online system. We have identified that there are currently 19 steps to the process.

The issues with the current system are:
- Slow and inefficient
- Wastes paper
- Risks paperwork being lost
- There is no way to track where the paperwork is at any given time.

PROPOSED SOLUTION(S) TO SUPPORT IMPROVEMENT:
We propose an online fully automated approval system (see Appendix 1 and 2).

This system could be based on the existing Project Request System, which is seamless, trackable and requires no printing of forms.

EXPECTED OUTCOMES:
The expected outcomes are:
- Improved turnaround times for authorisation. This would minimise any anxiety for the travel organiser.
- Work efficiency, saving the University money.
- Less paperwork would support RMIT’s environment policy. [Greening RMIT]
- A trackable system.
**Meeting the Criteria**

<table>
<thead>
<tr>
<th>Question</th>
<th>Answer</th>
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<tbody>
<tr>
<td>Does the proposed solution have a University-wide impact, or a significant impact at the organisational unit level?</td>
<td>Travel approval causes issues throughout the University. The impact of our proposed system would have a positive effect across all Portfolios.</td>
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<tr>
<td>What impact will implementing the proposed solution have on the efficiency and effectiveness of RMIT? To what extent will it contribute to the achievement of our strategic and operational priorities?</td>
<td>One of the values of Strategy 2010 is to be useful. Our proposed process delivers an outcome that is user friendly and efficient.</td>
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<tr>
<td>Is the proposed solution viable and practical? In particular has consideration been given to the resource implications of implementation of the solution?</td>
<td>The approval system for Project Requests can be modified to suit a Travel Authorisation system, which would mean minimal resource implications.</td>
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</table>
1. Obtain a quote from Campus Travel
2. Fill out the Online per diem form and Save
3. Print Per Diem form
4. Enter details into TRIM
5. Fill out On Line Travel Authority Form
6. Print Travel Authority Form
7. Collate all hard copies of travel paperwork and staple together
8. Write TRIM numbers on RH corner of collated copies
9. Place in Signatory’s In Tray
10. Signatory returns signed documents
11. Make photocopies
12. Send in internal mail to Portfolio Finance Staff
13. Finance Staff check details and forwards to PVC
14. PVC signs approval
15. Copies returned via internal mail
16. Travel organiser requests Campus Travel to proceed with travel booking and issue tickets
17. Copies are scanned
18. Travel Documents attached to relevant TRIM number
19. Travel Authority completed

Current Travel Authorisation System

Appendix 1

Proposed Travel Authorisation System

Automated Approval System

8a. Automatically emailed back with all approvals to travel organiser & Submit
8b. email-generated advice to Campus Travel
Appendix 2: Proposed Online Travel Authority

PLEASE COMPLETE ALL DETAILS on this form including flight numbers and accommodation details (when used) as this data is used for statistical purposes. If you experience difficulties with this form, please contact Warren Grant Insurance Manager on 9925 8232, or by email: warren.grant@rmit.edu.au.

REMEMBER TO “PRINT SUBMISSION BEFORE SENDING!” After printing the formatted document (which has a Tracking Number and signature area), quote the Tracking Number to the Travel Agent prior to ticket issue. Please Note: You will not be able to retrieve a sent submission for editing or printing without the assistance of ITS Helpdesk (Helpdesk Number 992 8888).

To start a new request please close the present window and open a new window.

Enter all dates in the format DD/MM/YY
All compulsory fields are marked with an asterisk (*)

Personal Details

Title *

First/Given Name*  Surname *

Name on Passport:

Portfolio/School/Group *
(choose one)

Employee No./Student ID *  Telephone No (in full) *

Corporate Credit Card No:  Expiry: MMYY  Name on Credit Card:

Booking Details

Travel Agent *

Campus Travel  Other:

Date of Booking *

From  to  (DD/MM/YY) inclusive

Dates of Travel *
Leave Dates of Absence (if applicable):

From ____________________________

to ____________________________ inclusive

BEST FARE of the day accepted? *

☐ Yes ☐ No

If no, please state reason:

Ticket: *

Delivered to office by (date):

(DD/MM/YY)

☐ E-ticket at airport

☐ Pickup from travel agent

Itinerary * 

Please include all sectors for tracking purposes

All legs of travel booked through Kistend/Campus?

☐ Yes – Fill out Campus Travel Booking Number below and attach Itinerary at end of this online form

☐ No – FILL IN ITINERARY BELOW

Campus Travel Booking Number

<table>
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<tr>
<th>From</th>
<th>To</th>
<th>Flight No.</th>
<th>Date (DD/MM/YY)</th>
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Accommodation *
Ask for the Govt or Negotiated rate for RMIT!

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<th>Hotel</th>
<th>Address &amp; City</th>
<th>Date in (DD/MM/YY)</th>
<th>Date out (DD/MM/YY)</th>
<th>Rate per Night</th>
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Estimated cost of trip *

Airfares: 

Accommodation: 

Conference Registration amount: 

Expenses: 

GST: 

Total Cost: $ 0

Sufficient funding available for trip? *

☐ Yes - supply the correct Internal Order numbers in the space below:
(If in doubt check with Portfolio Finance Manager)

i) Aust (Expenses) - 554300
ii) Aust (Fares) - 554310
iii) Overseas (Expenses) - 554400
iv) Overseas (Fares) - 554410

☐ No - Then explain your funding source:

TRIM Number
Portfolio: International and Development
School/Unit: Global Business Development Unit

Travel Approvers:
School/Unit Approver: Peter Thompson
FSG Check: Mai Chainq
Portfolio Approver: Madeleine Reeve

Travel Organiser: Mia Stankovski

Attachments
Attach all relevant documents, for example:
- Campus/Kistend Itinerary
- Meeting Itinerary
- Per Diem Form

Purpose of travel (summary) *

**Preview submission**
This form is now complete
Choose this option to indicate your application form is complete.
Click on the **preview submission** button to preview your application.
The form will alert you to any errors or omissions you have made.
Once you are happy with the preview, then PRINT OFF A COPY for yourself BEFORE submitting your Travel Authority form.

**Save details for later editing**
Save my data for later editing
Click this option if your form is incomplete and will need to be added to in the future.
Click on the **save details** button to add your partial application to the Travel Authority Database.
You will be able to add information to your submission at a later date.

**Clear form**
Blank out this form to start again
i The Portfolio list is a drop down list of all RMIT’s portfolios.

ii Once you choose the portfolio, the School/Unit list is automatically filtered to list the schools and units within the chosen portfolio.

iii We propose that the online Travel Authority automatically goes to each of the approvers – for example a travel authority for John Smith from GBDU would go to Peter Thompson then once Peter has approved it will automatically go to Mai Chaing and once Mai has checked it will automatically go to Madeleine Reeve for final approval. Once it has the final approval the travel authority would automatically be sent back to the travel organiser (to put a copy in TRIM) as well as Campus Travel so they know approval has been given to issue the tickets.

iv The School/Unit Approver list is automatically filtered once you choose the portfolio and school/unit from the drop down lists. The School/Unit Approver list should comprise of the school/unit approver as well as at least one backup person that will act in their place when they are away.

v The FSG Check list is automatically filtered once you choose the portfolio from the drop down list. The FSG Check list should comprise of two FSG staff members.

vi The Portfolio Approver list is automatically filtered once you choose the portfolio from the drop down list. The Portfolio Approver list should comprise of the Portfolio Approver as well as at least one backup person that will act in their place when they are away.