VERA C. RUBIN OBSERVATORY

Creating Rubin Observatory/AURA Travel Requests (TR's) via Reqless Costpoint

2022

Document-13760

NSF AURA U.S. DEPARTMENT OF ENERGY SLAC CHARLES AND LISA SIMONYI FUND FOR ARTS AND SCIENCES LSST CORPORATION

Definitions

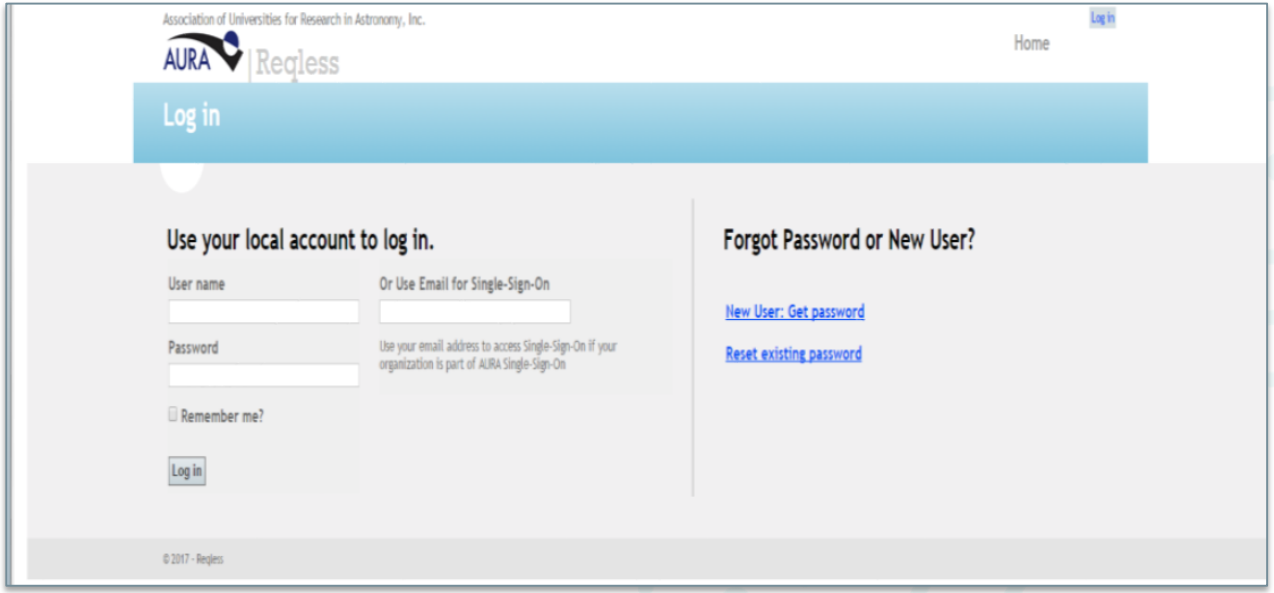
For the use of this document please see below for definitions.

- AURA- any direct AURA employee
- Project Member- any person of AURA. ie. SLAC, IPAC, UW, Princeton, NCSA, Harvard, SAC, PST, and all others that have user credentials
- Affiliate- all others

Reqless Log-in

To create a Rubin travel request (TR) visit (https://cas.aura-astronomy.org/ReqlessCP).

Reqless is an internal system for use by AURA employees. An accommodation has been made to allow some Rubin Partners and Affiliates the use Reqless for TR's.



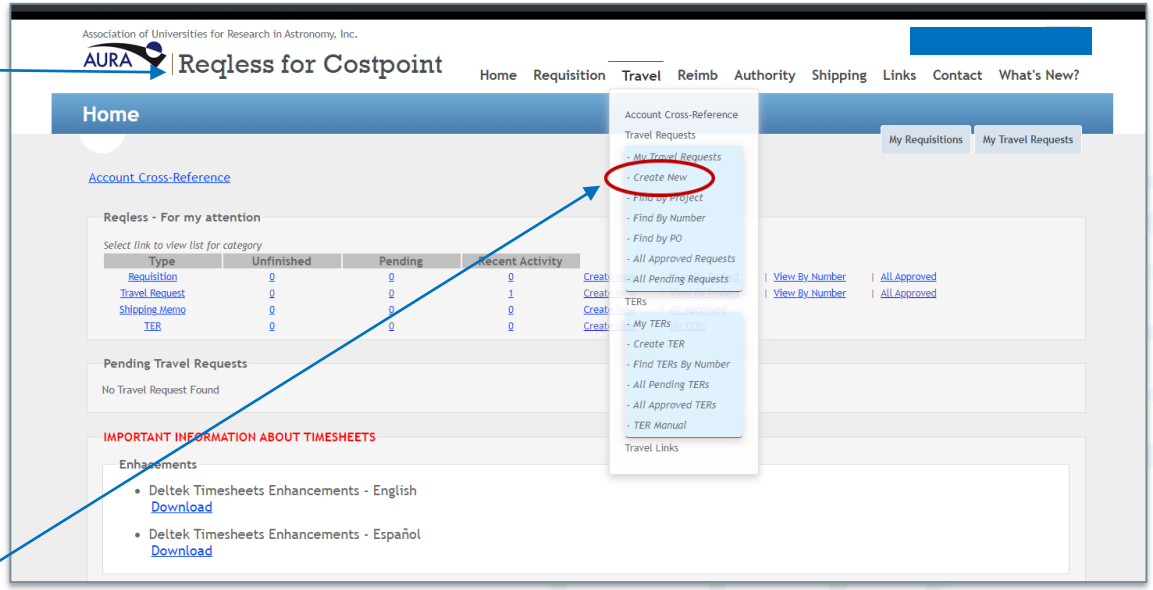
Reqless Home

Please make sure you are using “Reqless for Costpoint”.

The Reqless home page displays all your personal activity on Reqless: any requisitions, travel requests, shipping memos, and TERs with recent activity. *Note: Only AURA employees can see these functionalities. Partner and Affiliate lists will be shorter.*

The *Travel* tab shows multiple options for creating and searching for travel requests.

The *Create New* option is used to create a new travel request.



Create the Travel Request

Currency should be in USD, unless the trip is nationally in Chile.

On Behalf Of: Drop-down menu (see pages 6, 7 and 8)

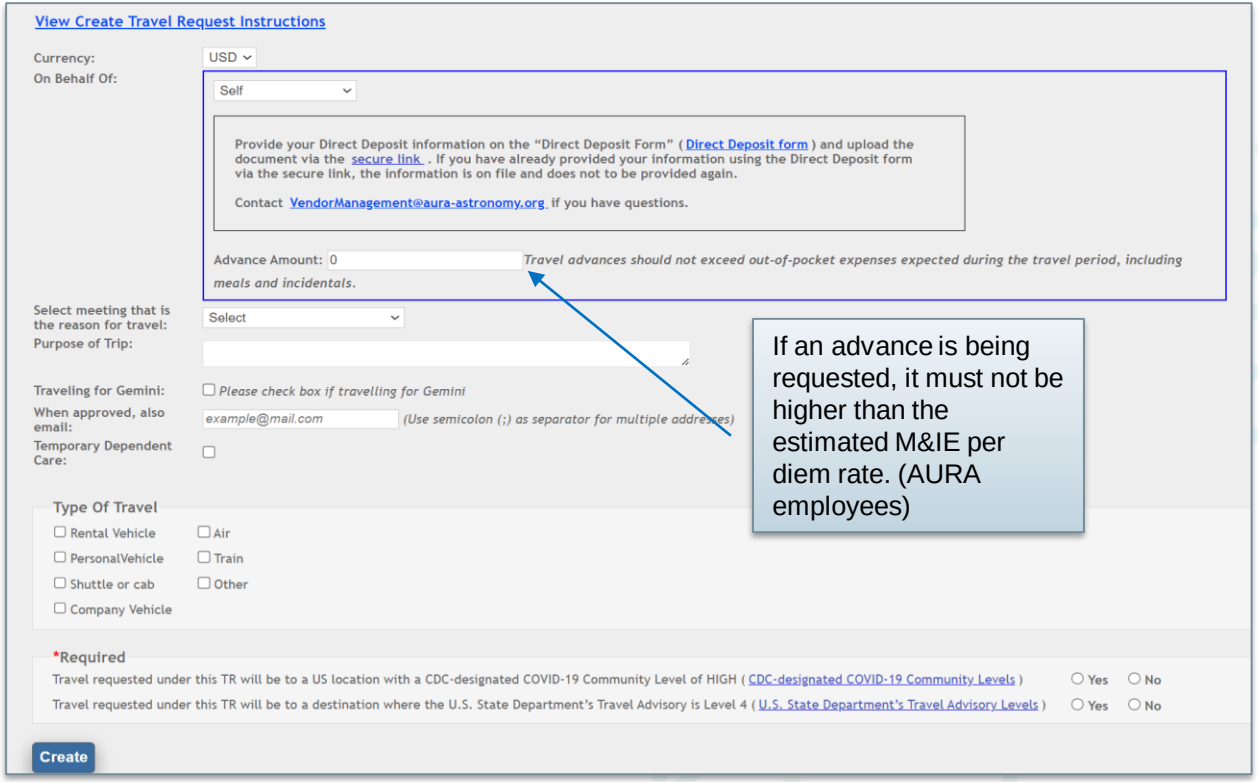
Meeting Reason: **Special committees only need select this option**

Purpose: Meeting name or description

Temporary Dependent Care: **Prior approval required,** please check this box if approved

Type of Travel: select all forms of travel needed for this request

Please click COVID boxes per CDC Guidelines.



Self or Other Employee

All Employees, Non Employees, Committee Members, and Contractors are all assigned a Vendor ID.

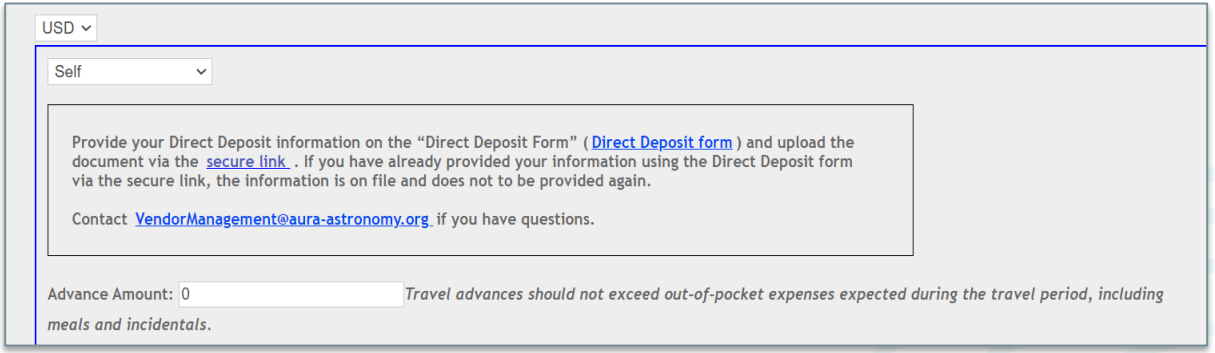
Please add the name in the box.

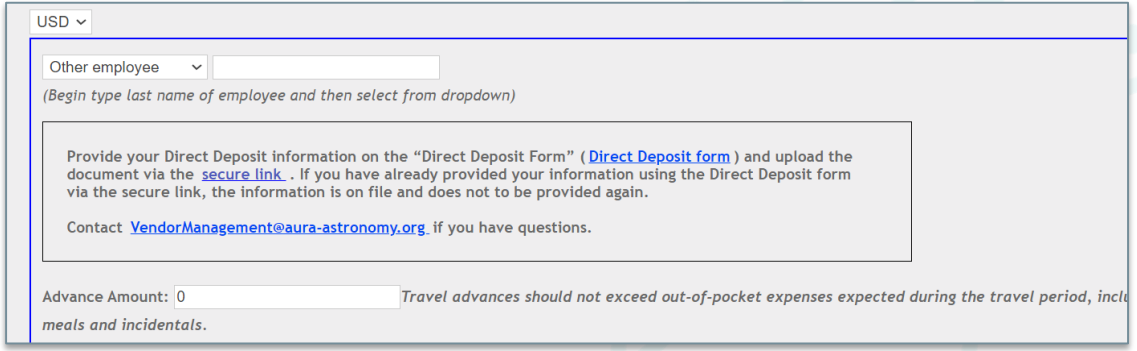
Then **tab** off of that box.

If a Vendor ID has not been requested, that box will be blank.

Click on the Direct Deposit Form, fill it out and send to the Secure Link provided. Once there is an assigned Vendor ID a Travel Request can be submitted.

If a Vendor ID is present, please tab from that box and enter the travelers email address.





Non-Employee (all affiliates)

All Employees, Non Employees, Committee Members, and Contractors are all assigned a Vendor ID.

Please add the name in the box.

Then **tab** off of that box.

If there is not have a Vendor ID, that box will be blank, and one will need to be requested.

Click on the Direct Deposit Form, fill it out and send to the Secure Link provided. Once there is an assigned Vendor ID a Travel Request can be submitted.

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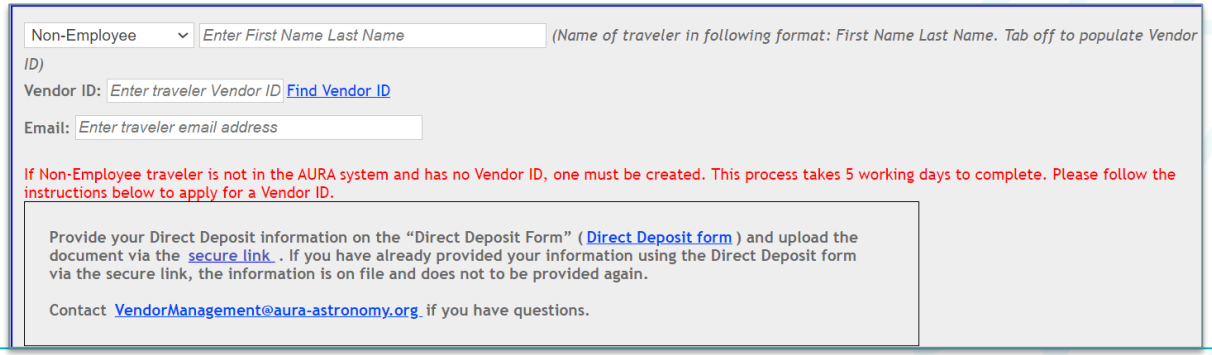

Committee Members and Contractors

All Employees, Non Employees, Committee Members, and Contractors are all assigned a Vendor ID.

Please add the name in the box.

Then **tab** off of that box.

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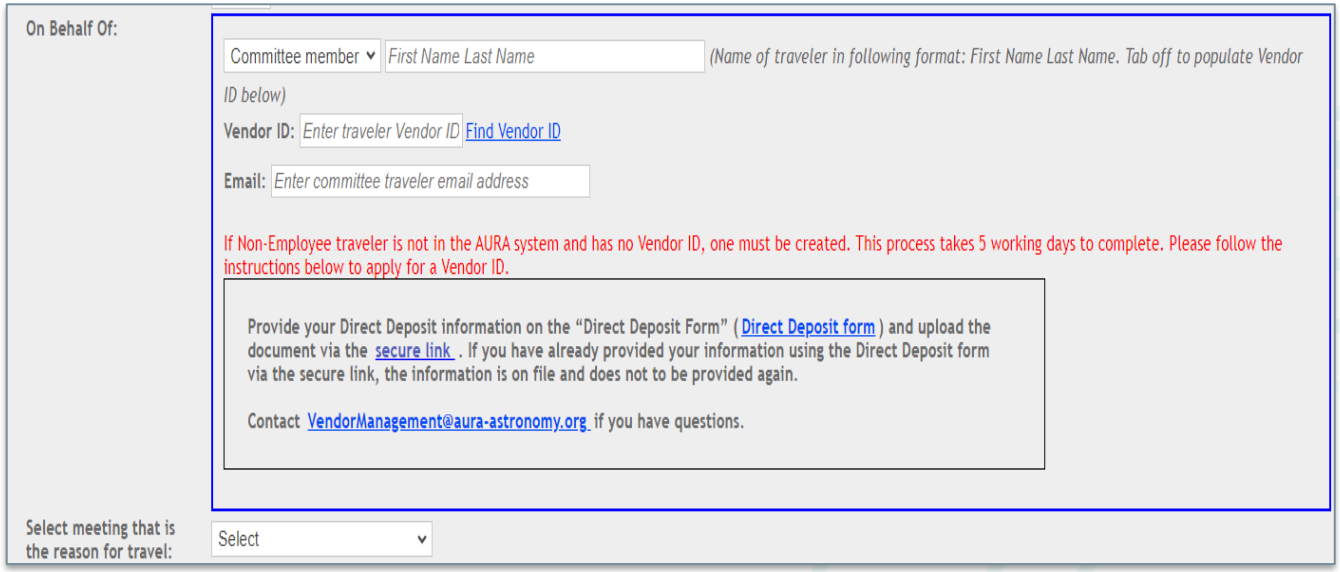
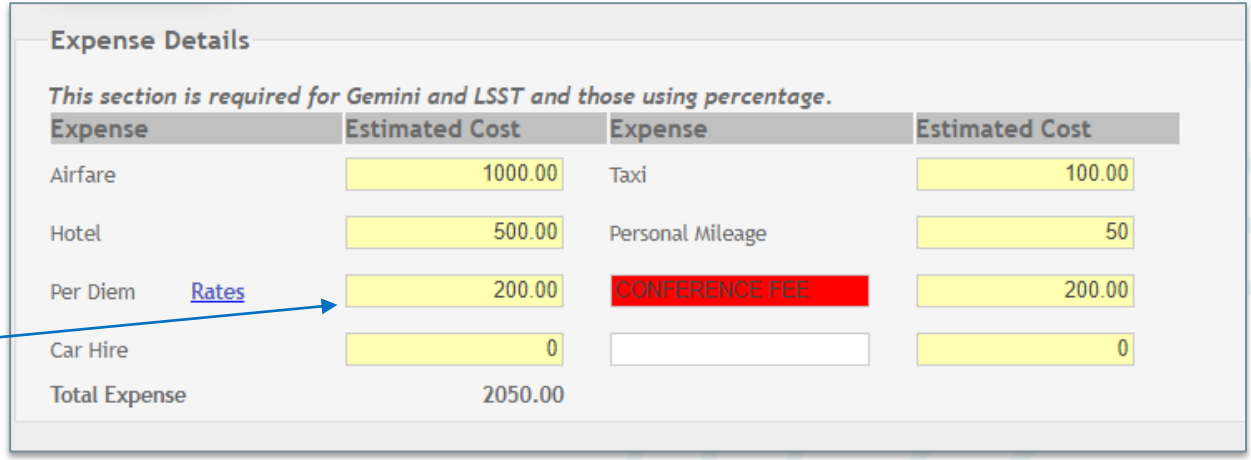


Expense Details

*Expense Details: Mandatory for **Rubin (LSST)** and Gemini.* Estimated amounts for each aspect of travel needed (please estimate at least 30% higher for airfare). Any other known travel expense estimates may also be added in the blank spaces.

If an advance is being requested, it must not be higher than the estimates M&IE per diem rate.



Expense Details

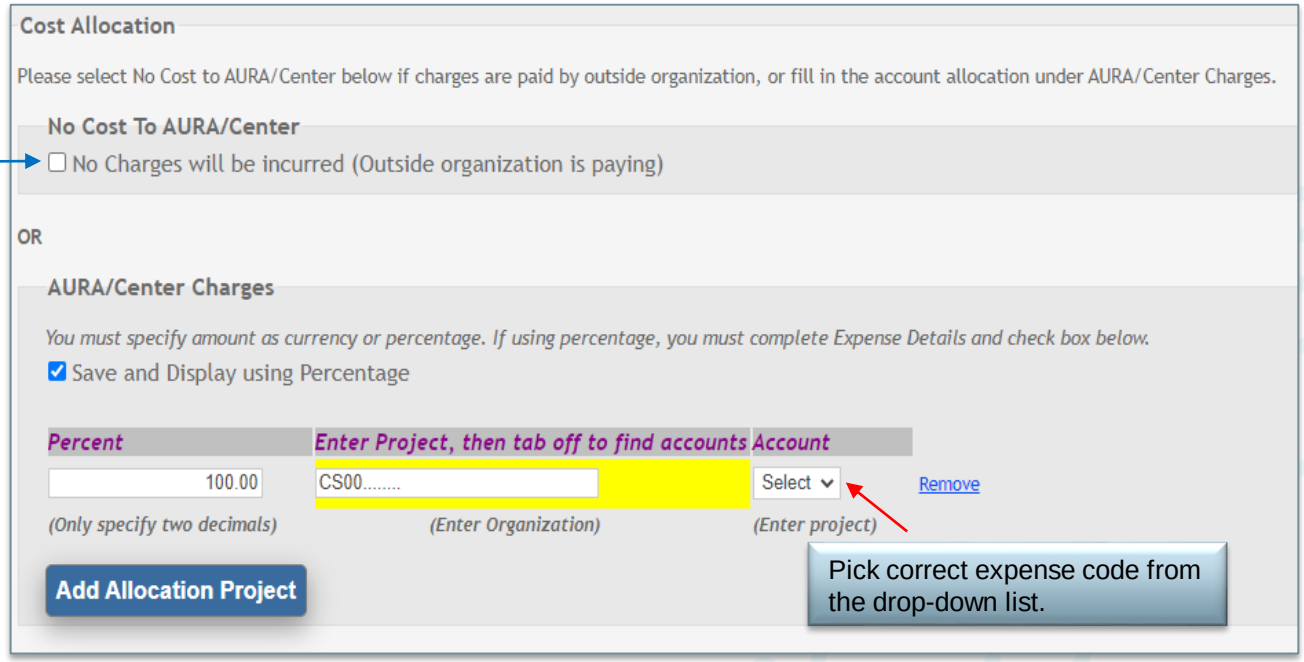
This section is required for Gemini and LSST and those using percentage.

Expense	Estimated Cost	Expense	Estimated Cost
Airfare	1000.00	Taxi	100.00
Hotel	500.00	Personal Mileage	50
Per Diem Rates	200.00	CONFERENCE FEE	200.00
Car Hire	0		0
Total Expense	2050.00		

Cost Allocations

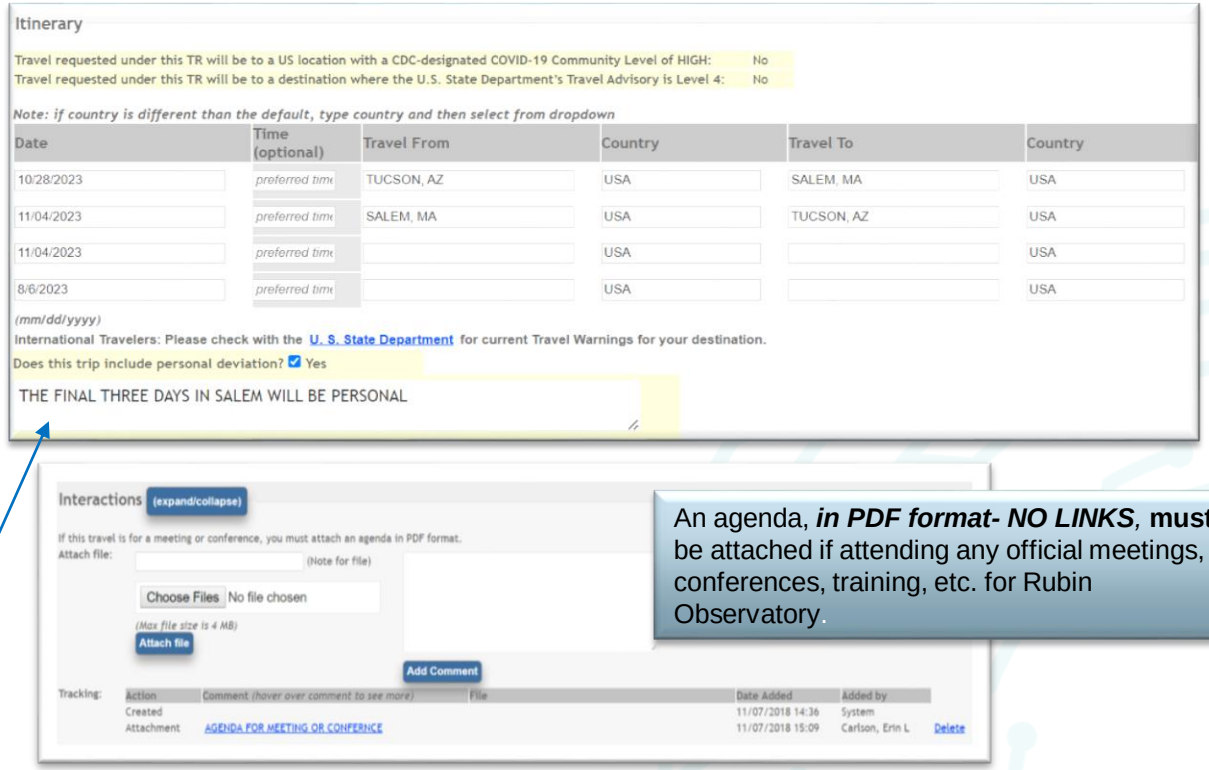
No Cost to AURA- please click this box if an outside organization is paying for your travel. Go on to Itinerary (next page).

AURA/Center Charges- The project number entered should be the account that will be charged for the travel. If there will be more than one account charged, click the “Add Allocation Account” box. Be sure to indicate the percentage of cost to be charged to each account.



Itinerary and Interactions

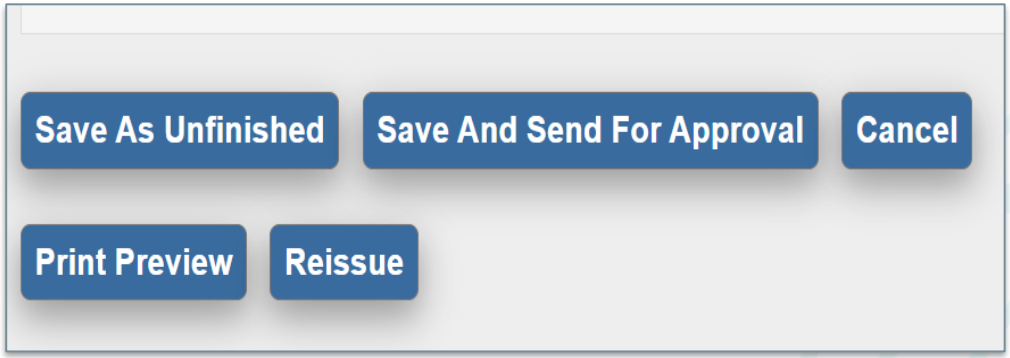
- *Date*- Travel date and time (Optional)
- *Travel From*/*Travel To*-
  - ♦ Enter the ***work*** location from which and to which you will travel.
  - ♦ Airport codes may be added to comment section if known.
  - ♦ Please change country name if traveling outside of the USA
- Repeat for return travel date, time, cities, and country on the next line.
- *Add Itinerary*-
  - ♦ Add more lines if needed for multi- city travel
- *Personal deviation*- please check the box and add exact deviation information in the comment section.



An agenda, ***in PDF format- NO LINKS***, **must** be attached if attending any official meetings, conferences, training, etc. for Rubin Observatory.

Finalizing

- Once completed, click the "*Save And Send for Approval*" button.
- However, if you require more time, you may choose the "*Save As Unfinished*" button and return later to complete the TR.
- The "*Cancel*" button allows you to cancel the travel request prior to sending it for approval.



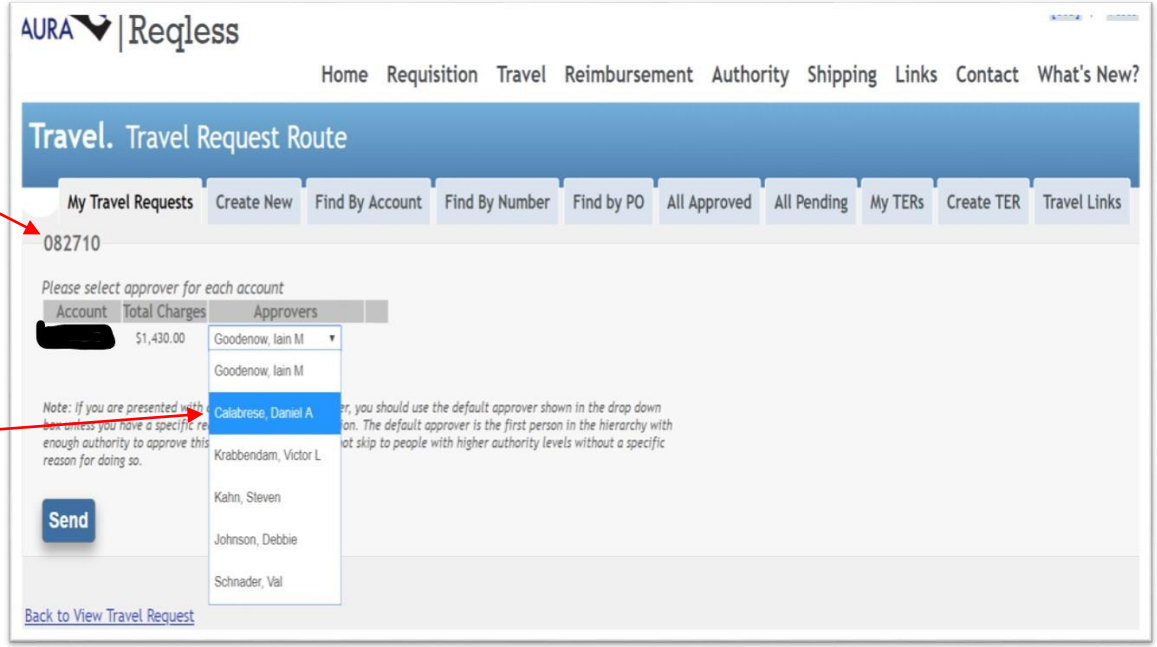
- The "*Reissue*" button allows you to reissue a previous travel request which will copy the exact information from the previous trip into a new TR and will create a new TR number. You may then may make any necessary changes for the travel request. ***Note: "Reissue" should not be used to make changes to an already existing TR.***

Approval

You will see that a travel request number is now created and you may use this number for reference.

Each account number may have several people who are able to approve requests for this charge number. Please be sure to select the correct person for approval. The TR is automatically directed to your immediate supervisor, no matter what charge number you allocate.

Click “*send*” and you are finished.



Questions?
Please contact Erin Carlson, Rubin Observatory Travel Administrator,
ecarlson@lsst.org