



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

2022

Document-13760



U.S. DEPARTMENT OF
ENERGY



CHARLES AND LISA SIMONYI FUND
••• FOR ARTS AND SCIENCES •••



Definitions

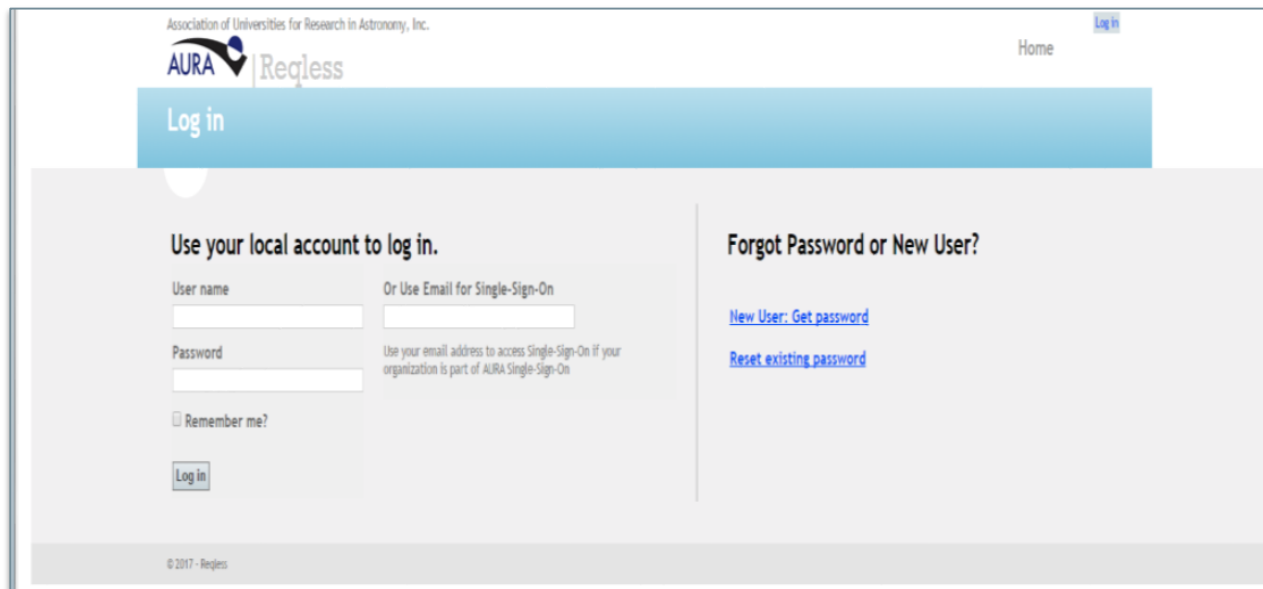
For the use of this document please see below for definitions.

- 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.



Association of Universities for Research in Astronomy, Inc.

AURA | Reqless Home [Log in](#)

Log in

Use your local account to log in.

User name

Or Use Email for Single-Sign-On

Password

Use your email address to access Single-Sign-On if your organization is part of AURA Single-Sign-On

Remember me?

[Log in](#)

Forgot Password or New User?

[New User: Get password](#)

[Reset existing password](#)

© 2017 - Reqless

Reqless Home

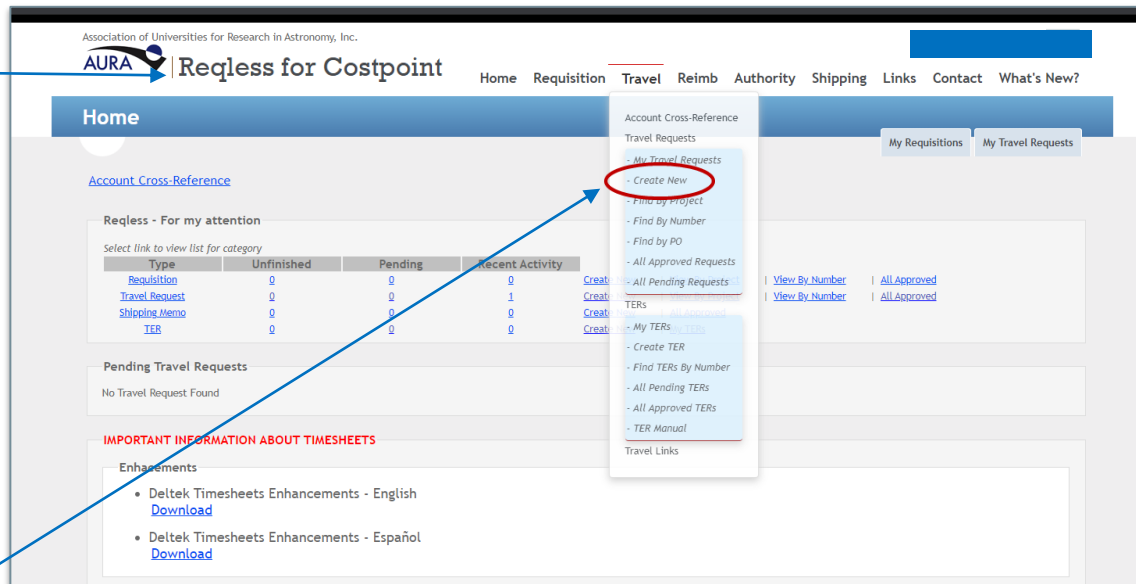
Please make sure you are using “Reqless for Costpoint”.

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.



Association of Universities for Research in Astronomy, Inc.
AURA Reqless for Costpoint

Home Requisition **Travel** Reimb Authority Shipping Links Contact What's New?

Home

Account Cross-Reference

Travel Requests

- My Travel Requests
- Create New
- Find by Project
- Find By Number
- Find by PO
- All Approved Requests
- All Pending Requests

TERs

- My TERs
- Create TER
- Find TERs By Number
- All Pending TERs
- All Approved TERs
- TER Manual

Travel Links

My Requisitions My Travel Requests

[Account Cross-Reference](#)

Reqless - For my attention

Select link to view list for category

Type	Unfinished	Pending	Recent Activity	Create
Requisition	0	0	0	Create
Travel Request	0	0	1	Create
Shipping Memo	0	0	0	Create
TER	0	0	0	Create

Pending Travel Requests

No Travel Request Found

IMPORTANT INFORMATION ABOUT TIMESHEETS

Enhancements

- Deltek Timesheets Enhancements - English
[Download](#)
- Deltek Timesheets Enhancements - Español
[Download](#)

[View By Number](#) | [All Approved](#)

[View By Number](#) | [All Approved](#)

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.

[View Create Travel Request Instructions](#)

Currency: USD ▾

On Behalf Of: Self ▾

Provide your Direct Deposit information on the "Direct Deposit Form" ([Direct Deposit form](#)) and upload the document via the [secure link](#) . If you have already provided your information using the Direct Deposit form via the secure link, the information is on file and does not to be provided again.

Contact VendorManagement@aura-astronomy.org if you have questions.

Advance Amount: 0 Travel advances should not exceed out-of-pocket expenses expected during the travel period, including meals and incidentals.

Select meeting that is the reason for travel: Select ▾

Purpose of Trip:

Traveling for Gemini: Please check box if travelling for Gemini

When approved, also email: (Use semicolon (;) as separator for multiple addresses)

Temporary Dependent Care:

Type Of Travel

<input type="checkbox"/> Rental Vehicle	<input type="checkbox"/> Air
<input type="checkbox"/> PersonalVehicle	<input type="checkbox"/> Train
<input type="checkbox"/> Shuttle or cab	<input type="checkbox"/> Other
<input type="checkbox"/> Company Vehicle	

***Required**

Travel requested under this TR will be to a US location with a CDC-designated COVID-19 Community Level of HIGH ([CDC-designated COVID-19 Community Levels](#)) Yes No

Travel requested under this TR will be to a destination where the U.S. State Department's Travel Advisory is Level 4 ([U.S. State Department's Travel Advisory Levels](#)) Yes No

Create

If an advance is being requested, it must not be higher than the estimated M&IE per diem rate. (AURA employees)

Self or Other Employee

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

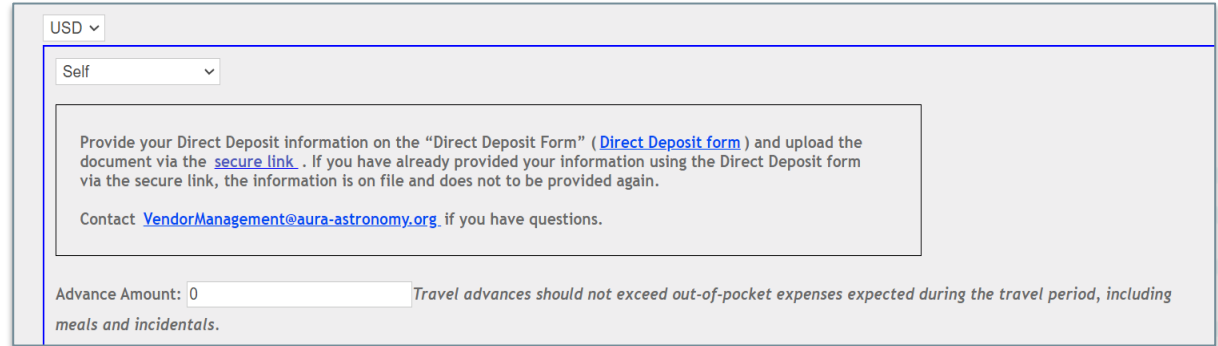
Please add the name in the box.

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.



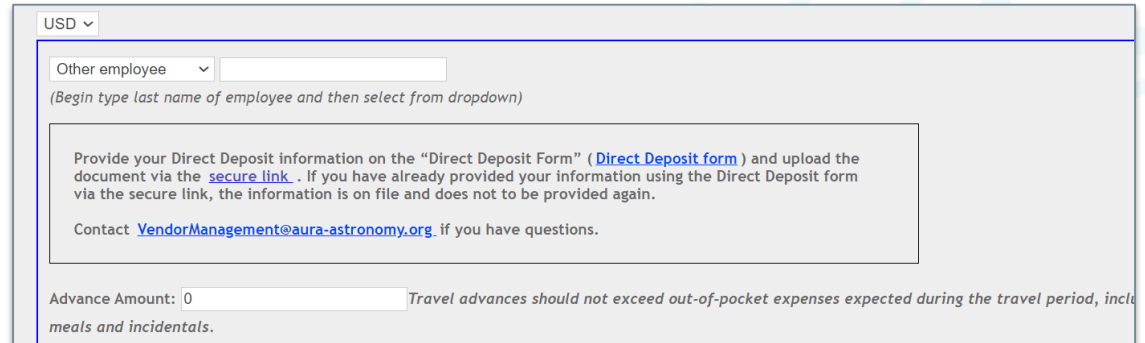
USD ▾

Self ▾

Provide your Direct Deposit information on the "Direct Deposit Form" ([Direct Deposit form](#)) and upload the document via the [secure link](#). If you have already provided your information using the Direct Deposit form via the secure link, the information is on file and does not to be provided again.

Contact VendorManagement@aura-astronomy.org if you have questions.

Advance Amount: 0 *Travel advances should not exceed out-of-pocket expenses expected during the travel period, including meals and incidentals.*



USD ▾

Other employee ▾

(Begin type last name of employee and then select from dropdown)

Provide your Direct Deposit information on the "Direct Deposit Form" ([Direct Deposit form](#)) and upload the document via the [secure link](#). If you have already provided your information using the Direct Deposit form via the secure link, the information is on file and does not to be provided again.

Contact VendorManagement@aura-astronomy.org if you have questions.

Advance Amount: 0 *Travel advances should not exceed out-of-pocket expenses expected during the travel period, including meals and incidentals.*

Non-Employee (all affiliates)

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

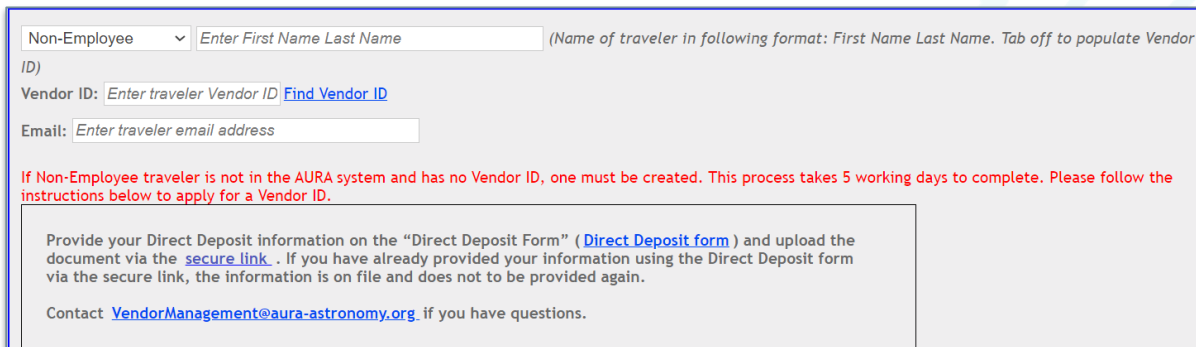
Please add the name in the box.

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.

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



Non-Employee (Name of traveler in following format: First Name Last Name. Tab off to populate Vendor ID)

Vendor ID: [Find Vendor ID](#)

Email:

If Non-Employee traveler is not in the AURA system and has no Vendor ID, one must be created. This process takes 5 working days to complete. Please follow the instructions below to apply for a Vendor ID.

Provide your Direct Deposit information on the "Direct Deposit Form" ([Direct Deposit form](#)) and upload the document via the [secure link](#) . If you have already provided your information using the Direct Deposit form via the secure link, the information is on file and does not to be provided again.

Contact VendorManagement@aura-astronomy.org if you have questions.

Committee Members and Contractors

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

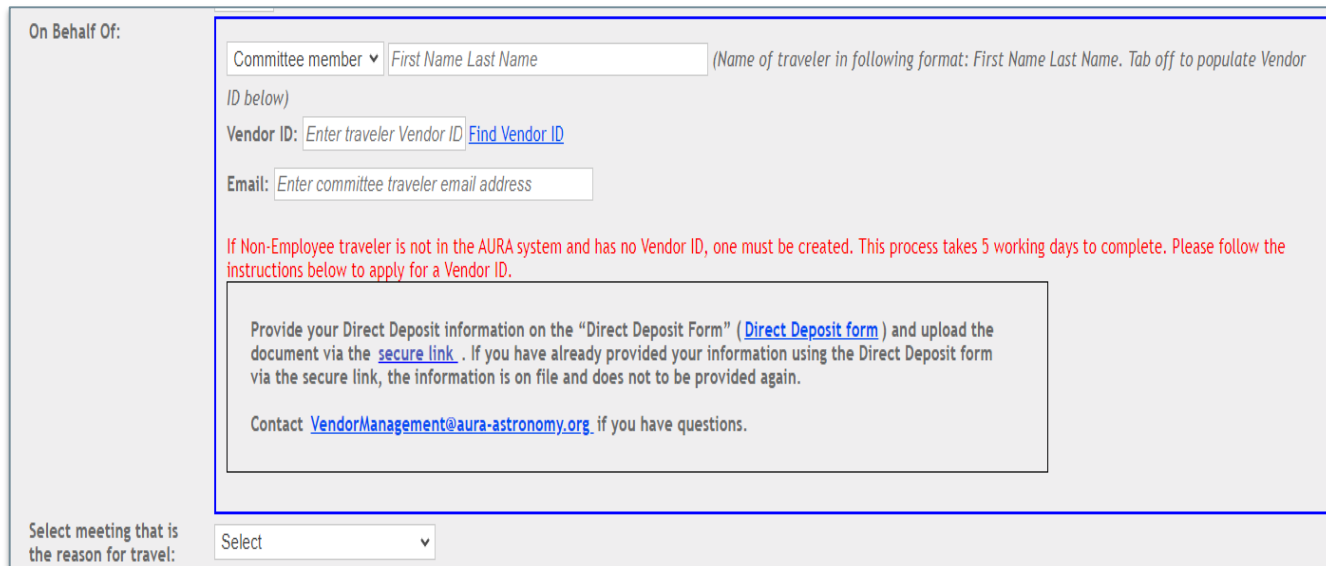
Please add the name in the box.

Then **tab** off of that box.

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.

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



On Behalf Of: (Name of traveler in following format: First Name Last Name. Tab off to populate Vendor ID below)

Vendor ID: [Find Vendor ID](#)

Email:

If Non-Employee traveler is not in the AURA system and has no Vendor ID, one must be created. This process takes 5 working days to complete. Please follow the instructions below to apply for a Vendor ID.

Provide your Direct Deposit information on the "Direct Deposit Form" ([Direct Deposit form](#)) and upload the document via the [secure link](#). If you have already provided your information using the Direct Deposit form via the secure link, the information is on file and does not to be provided again.

Contact VendorManagement@aura-astronomy.org if you have questions.

Select meeting that is the reason for travel:

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.

Cost Allocation

Please select No Cost to AURA/Center below if charges are paid by outside organization, or fill in the account allocation under AURA/Center Charges.

No Cost To AURA/Center

No Charges will be incurred (Outside organization is paying)

OR

AURA/Center Charges

You must specify amount as currency or percentage. If using percentage, you must complete Expense Details and check box below.

Save and Display using Percentage

Percent	Enter Project, then tab off to find accounts	Account	
<input style="width: 100%;" type="text" value="100.00"/> <small>(Only specify two decimals)</small>	<input style="width: 100%; background-color: yellow;" type="text" value="CS00....."/> <small>(Enter Organization)</small>	<input style="width: 100%;" type="text" value="Select"/>	Remove

[Add Allocation Project](#)

Pick correct expense code from the drop-down list.

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.

Itinerary

Travel requested under this TR will be to a US location with a CDC-designated COVID-19 Community Level of HIGH: No
 Travel requested under this TR will be to a destination where the U.S. State Department's Travel Advisory is Level 4: No

Note: if country is different than the default, type country and then select from dropdown

Date	Time (optional)	Travel From	Country	Travel To	Country
10/28/2023	preferred time	TUCSON, AZ	USA	SALEM, MA	USA
11/04/2023	preferred time	SALEM, MA	USA	TUCSON, AZ	USA
11/04/2023	preferred time		USA		USA
8/6/2023	preferred time		USA		USA

(mm/dd/yyyy)

International Travelers: Please check with the [U. S. State Department](#) for current Travel Warnings for your destination.

Does this trip include personal deviation? Yes

THE FINAL THREE DAYS IN SALEM WILL BE PERSONAL

Interactions (expand/collapse)

If this travel is for a meeting or conference, you must attach an agenda in PDF format.

Attach file: (Note for file)

Choose Files No file chosen

(Max file size is 4 MB)

Attach file

Add Comment

Tracking:

Action	Comment (hover over comment to see more)	File	Date Added	Added by
Created			11/07/2018 14:36	System
Attachment	AGENDA FOR MEETING OR CONFERENCE		11/07/2018 15:09	Carlson, Erin L Delete

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.



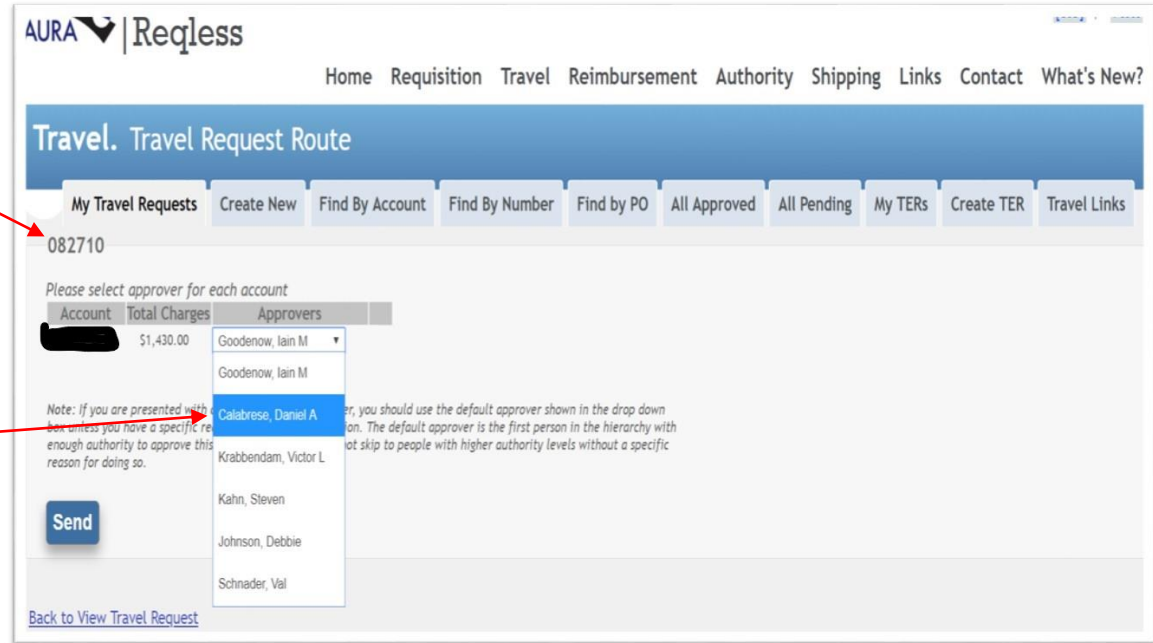
- The “*Reissue*” button allows you to reissue a previous travel request which will copy the exact information from the previous trip into a new TR and will create a new TR number. You may then may make any necessary changes for the travel request. **Note: “*Reissue*” should not be used to make changes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



AURA | Reqless

Home Requisition Travel Reimbursement Authority Shipping Links Contact What's New?

Travel. Travel Request Route

My Travel Requests Create New Find By Account Find By Number Find by PO All Approved All Pending My TERs Create TER Travel Links

082710

Please select approver for each account

Account	Total Charges	Approvers
[REDACTED]	\$1,430.00	Goodenow, Iain M Goodenow, Iain M Calabrese, Daniel A Krabbendam, Victor L Kahn, Steven Johnson, Debbie Schnader, Val

Note: If you are presented with a dropdown menu, you should use the default approver shown in the drop down menu. The default approver is the first person in the hierarchy with enough authority to approve this request. Do not skip to people with higher authority levels without a specific reason for doing so.

Send

[Back to View Travel Request](#)

Questions?

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