



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

2022

Document-13760



U.S. DEPARTMENT OF
ENERGY

SLAC

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



Definitions

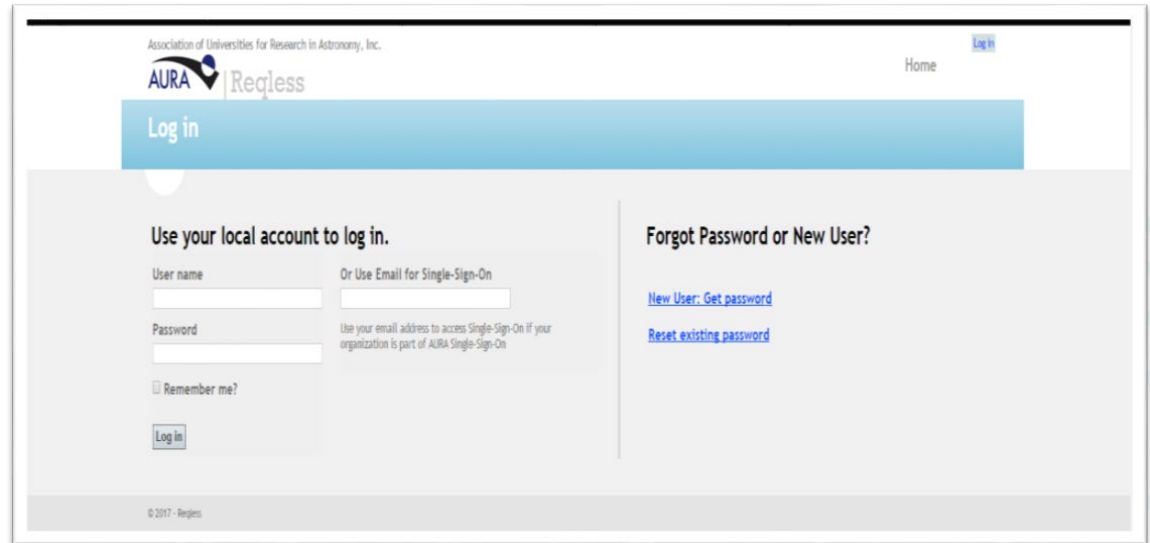
For the use of this document please see below for definitions.

- AURA- any direct AURA employee
- Project Member- any person of AURA. ie. SLAC, IPAC, UW, Princeton, NCSA, Harvard, SAC, PST, other boards, etc. that has 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.



The screenshot shows the Reqless login interface. At the top, it says "Association of Universities for Research in Astronomy, Inc." and "AURA Reqless". There is a "Home" link and a "Log in" link in the top right. A large blue "Log in" button is prominent. Below it, the main login area is divided into two sections. The left section is titled "Use your local account to log in." and contains fields for "User name" and "Password", a "Remember me?" checkbox, and a "Log in" button. The right section is titled "Forgot Password or New User?" and contains two links: "New User: Get password" and "Reset existing password". At the bottom left, there is a copyright notice: "© 2017 - Reqless".

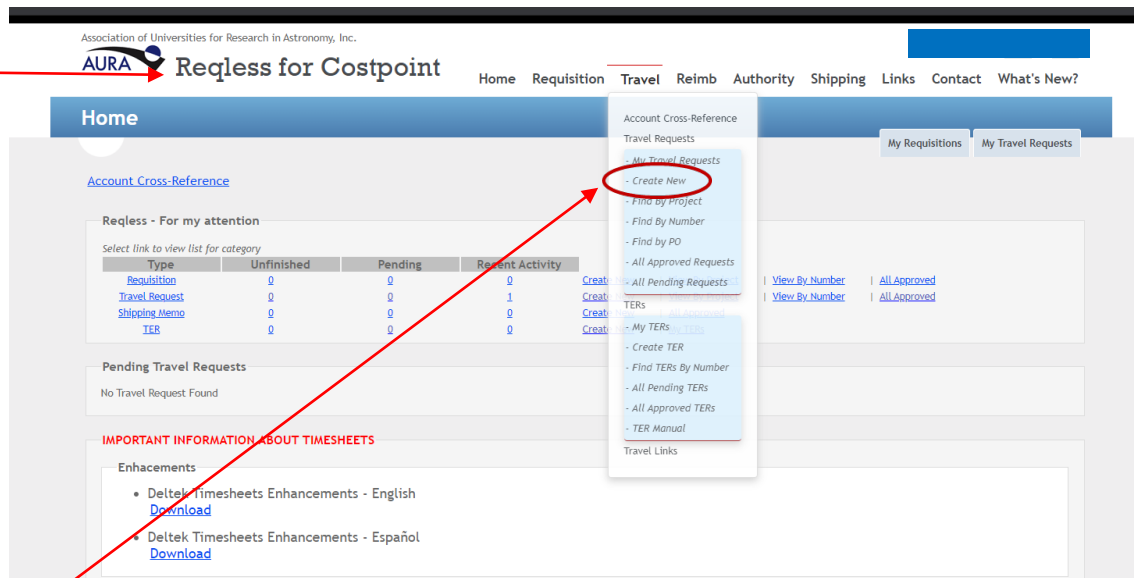
Reqless Home

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* tab 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

View By Number | All Approved

TERs

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

Travel Links

My Requisitions My Travel Requests

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](#)

Trip and Expense Details

On Behalf Of: Partners and Affiliates names should be *Last-name, First-name*; this box will look different on your page

Note: Advances are for AURA employees only.

Temporary Dependent Care: Please check this box if temporary dependent care will be expensed- prior approval is **mandatory**.

Expense Details: Mandatory for Rubin (LSST) and Gemini. Estimated amounts for each aspect of travel needed (please estimate high rather than low). Any other known expense estimates may also be added in the blank spaces.

Currency:

On Behalf Of:

Purpose of Trip:

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

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

Rental Vehicle Air

PersonalVehicle Train

Shuttle or cab Other

Company Vehicle

Click all forms travel needed and/or will be using.

When approved, also email: Partners and Affiliates should add their contact email in this space.

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	<input type="text"/>	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 account 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 type="text" value="100.00"/>	<input type="text" value="CS00....."/>	<input type="text" value="Select"/>	Remove
<small>(Only specify two decimals)</small>	<small>(Enter Organization)</small>	<small>(Enter project)</small>	

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

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

Date	Time (optional)	Travel From	Country	Travel To	Country	
12/10/2018	preferred time	TUCSON, AZ	USA	NEW YORK, NY	USA	Remove
12/17/2018	preferred time	NEW YORK, NY	USA	TUCSON, AZ	USA	Remove

(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

[Add Itinerary](#)

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](#)

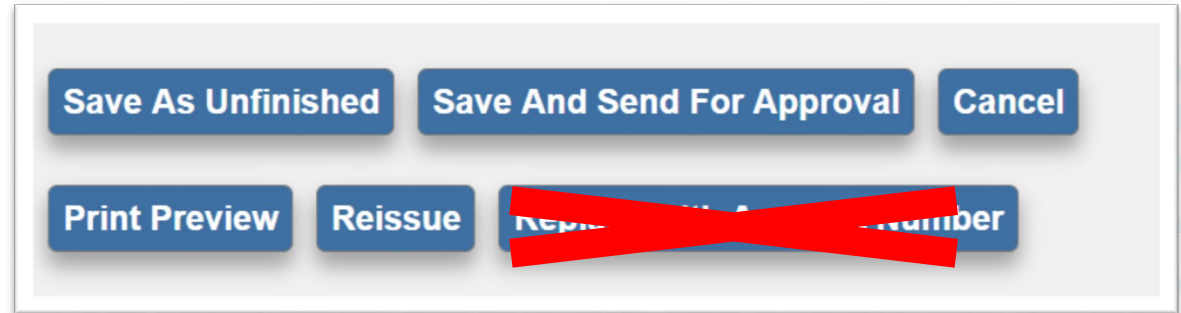
[Add Comment](#)

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 make any necessary changes for the travel request. *Note: “Reissue” should not be used to make changes to an already existing TR.*

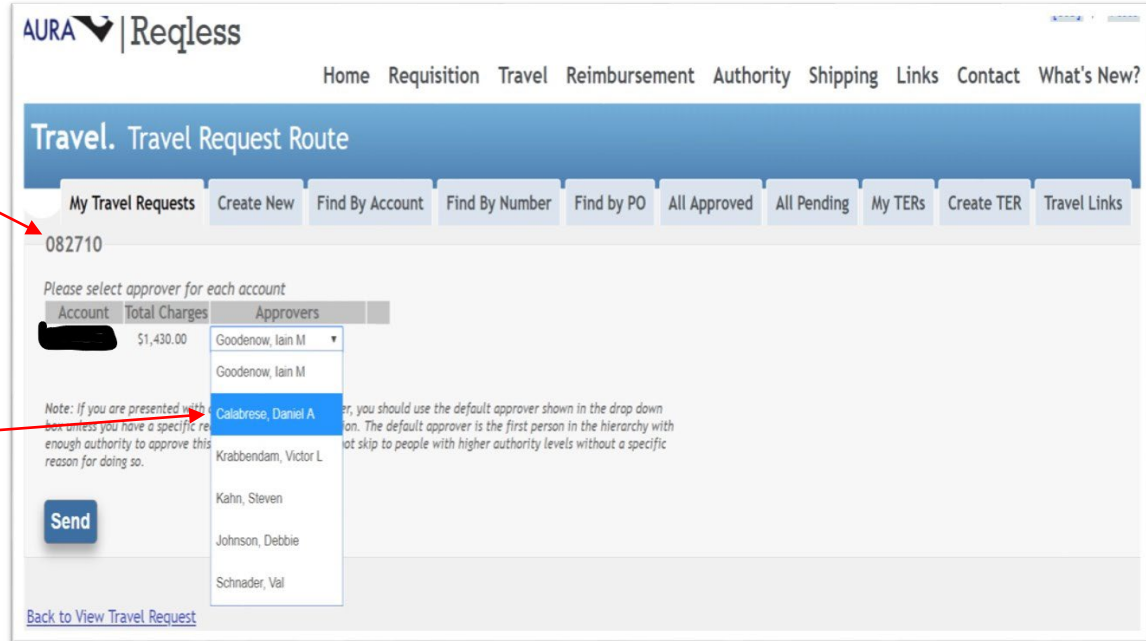


Approval

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