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

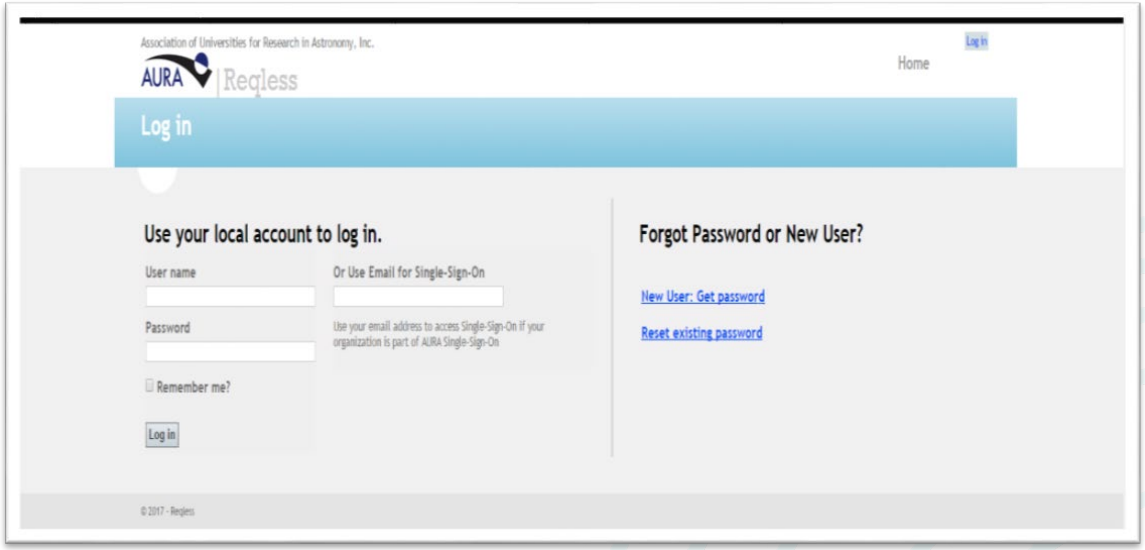
For the use of this document please see below for definitions.

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

Reqless Log-in

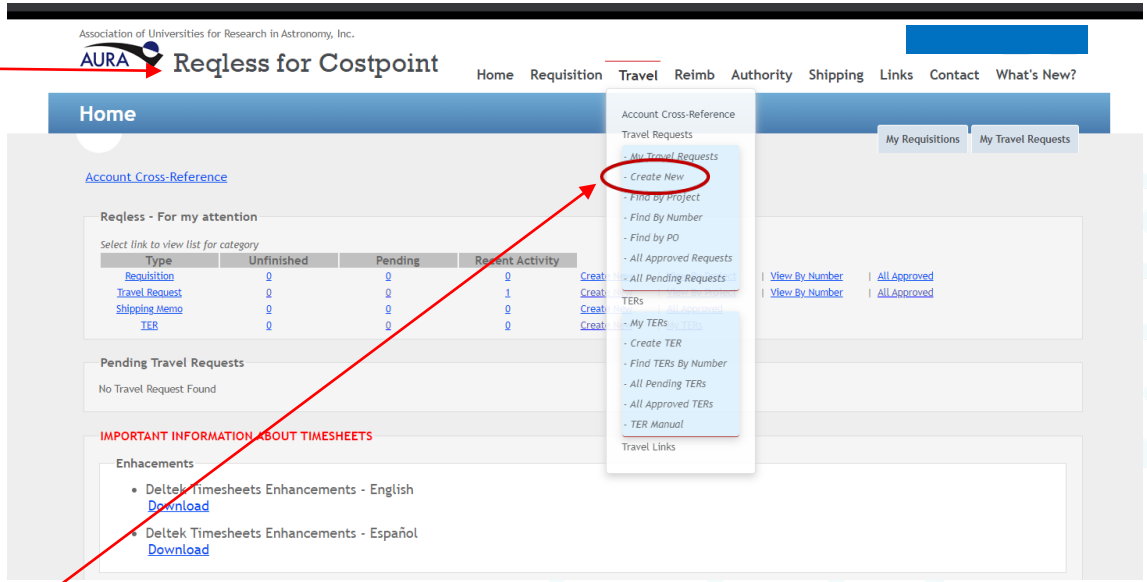
To create a Rubin travel request (TR) visit (https://cas.aura-astronomy.org/ReqlessCP).

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.



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.

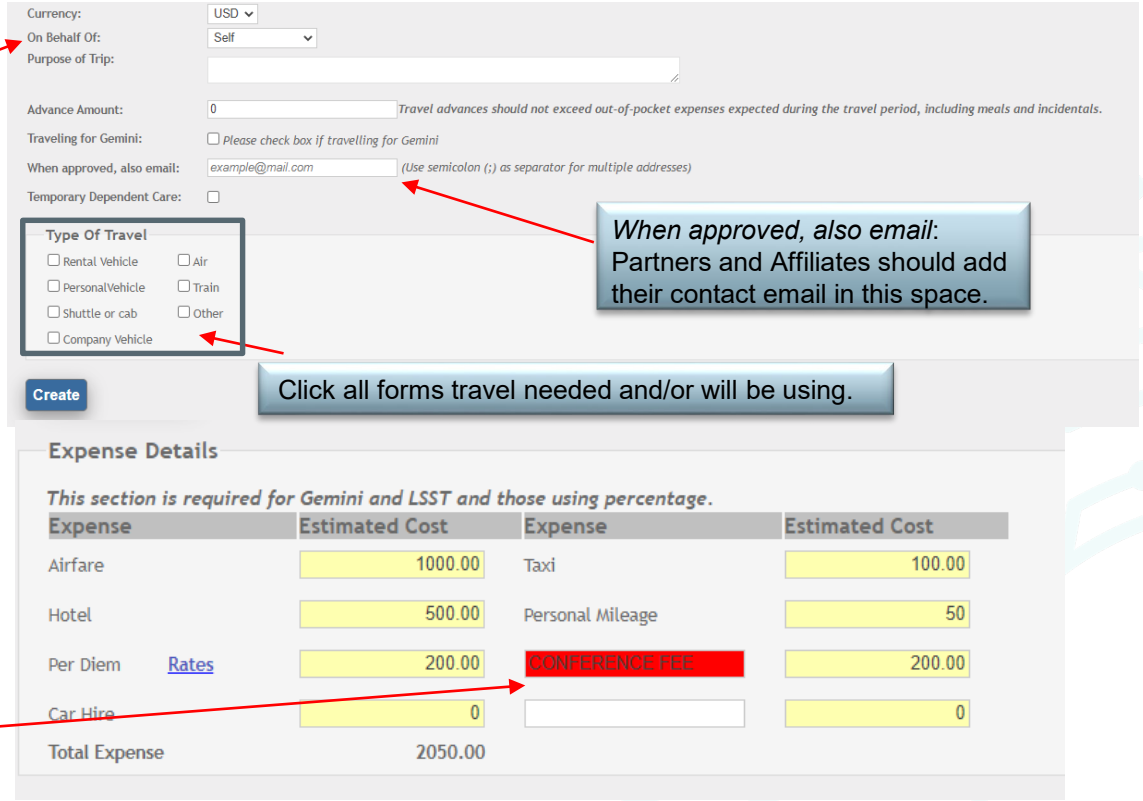
Trip and Expense Details

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.

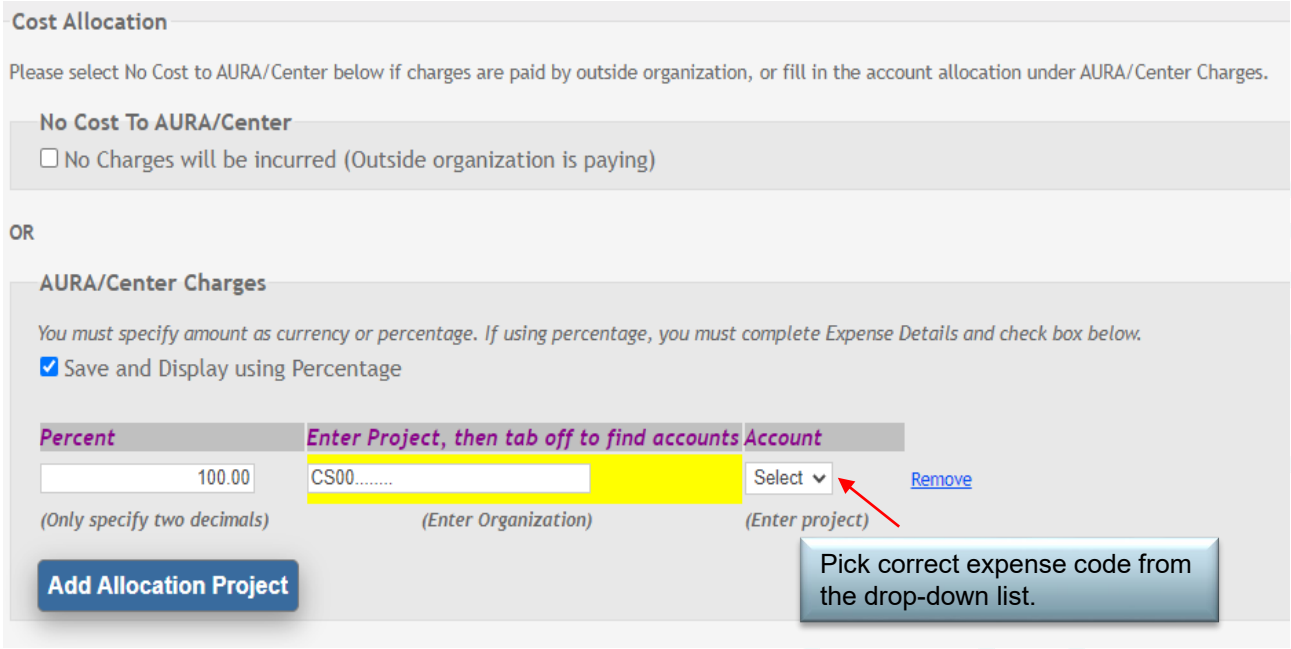
*Expense Details: Mandatory for **Rubin (LSST)** and Gemini*. Estimated amounts for each aspect of travel needed (please estimate high rather than low). Any other known expense estimates may also be added in the blank spaces.



Cost Allocations

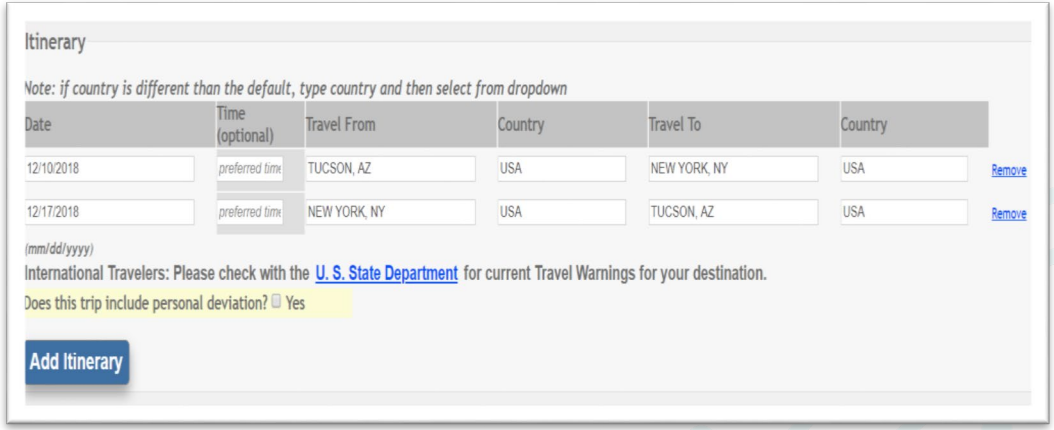
No Cost to AURA- please click this box if an outside organization is paying for your travel. Go on to Itinerary (next page).

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.



Itinerary and Interactions

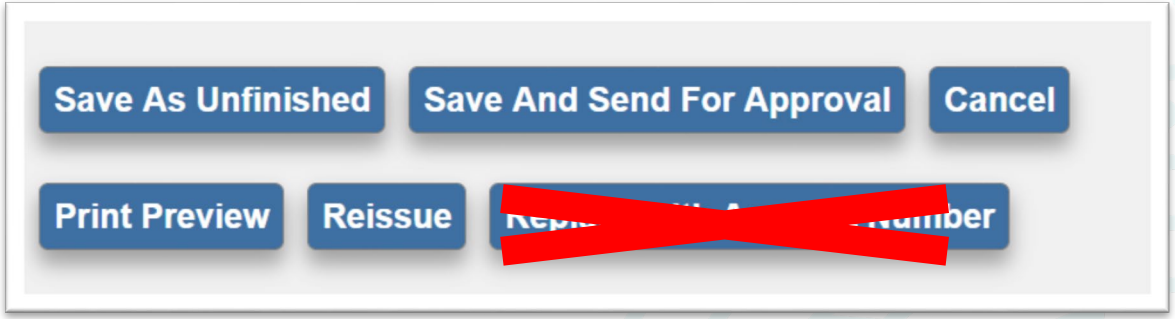
- *Date*- Travel date and time (Optional)
- *Travel From*/*Travel To*-
  - ♦ Enter the ***work*** location from which and to which you will travel.
  - ♦ Airport codes may be added to comment section if known.
  - ♦ Please change country name if traveling outside of the USA
- Repeat for return travel 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.*

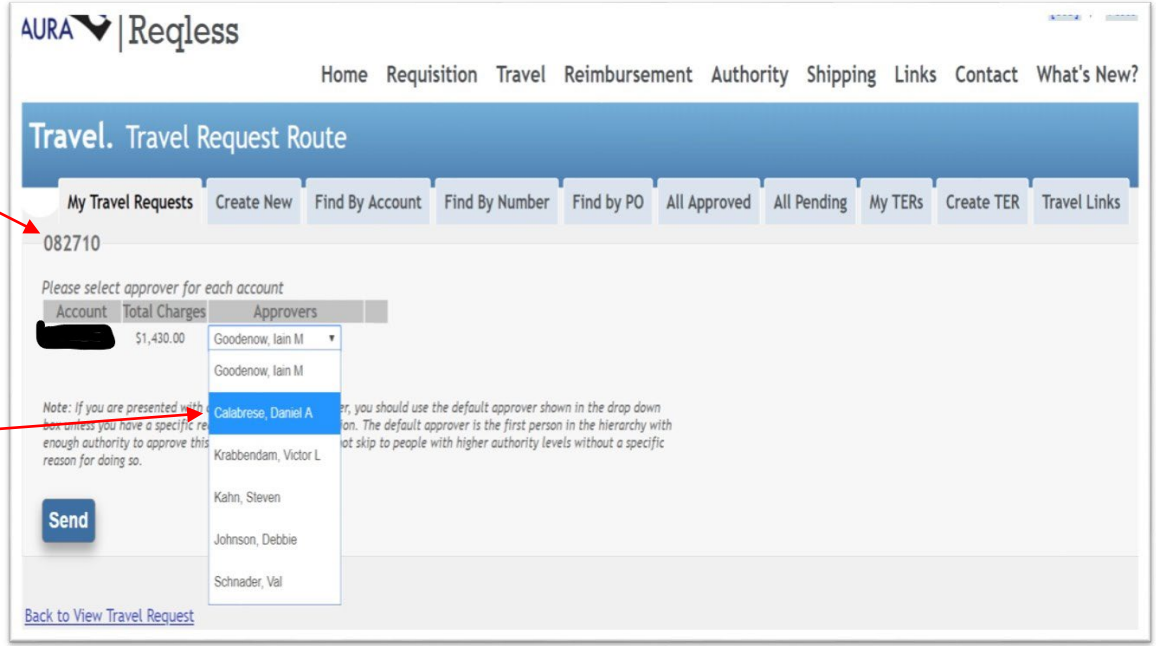


Approval

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