

## OLG and DCRT – Travel Authorization (TA) Form Instructions

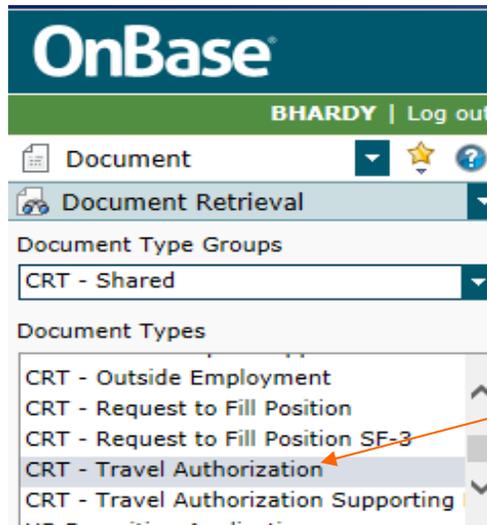
1. Open DCRT's Channel Z page; Click on E-Forms



2. In the **Travel Forms section**, click on:  
**Travel Authorization Form -OnBase Workflow Form**
3. Each section in the **green** area is required; except for your Employee Number
4. In the **Type of Authorization** drop down box, if you select “**Annual**” as the type of authorization then no dollar value is needed
5. If you select “**Single Trip,**” complete the information in the **Detail Estimation of Travel Expenses, *only if expenses are to be incurred.***
6. When you have completed the form, click on **Submit Form** located on the bottom right of the form next to the **Purpose of Trip** section
7. After clicking on **Submit Form**, you can **view** and/or **add** a supporting document to the travel authorization form by following the steps below:

**To view and attach a supporting document to a Travel Authorization form:**

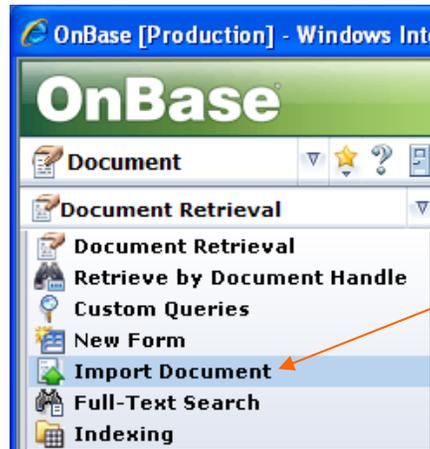
1. Open DCRT's Channel Z page and click on the **OnBase** button
2. In the **Document Type Groups** section, select **CRT-SHARED**; then highlight **CRT – Travel Authorization** in the Document Types section



1. In the Keywords section, type the appropriate **keyword** value, such as the *Authorization ID* (if known), *Employee Name* (of traveler – use \* as wild card – for instance \*LASTNAME\*) or *Requestor* (user name), then hit **Enter** or click on the **Binoculars**  at the bottom of the screen.
2. Documents that match your search query will display in the **Document Search Results** window.
3. **Double-click** to open a TA Request document. Scroll to the bottom of the form to view approvals

**To attach a related document to a Travel Authorization Request:**

1. Click on the down arrow next to **Document Retrieval** and select **Import Document**

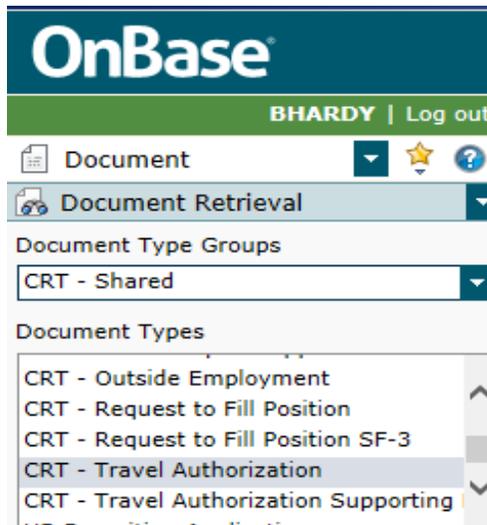


2. Click on **Browse** and navigate to the file you would like to attach and click on **Open**.
3. In the **Document Type Groups** section, select **CRT – Shared** and in the **Document Types** section, select **CRT-Travel Authorization Supporting Documents**
4. Complete the **required** information (**Authorization ID and Description**)

5. Click on the **Import** icon  at the bottom of the screen.
6. **Import Succeeded** should appear at the top of the screen.
7. To view the TA request and supporting document, click on the down arrow next to **Import Document** and select **Document Retrieval**, then follow the steps below on **How to view a TA Request and supporting document**.

**To view a Travel Authorization Request and supporting document:**

1. In the **Document Type Groups** section make sure **CRT – SHARED** is selected
2. In the **Document Types** section, click on **CRT-Travel Authorization**; enter a keyword



3. Right-click on the **TA Request** form and click on **Cross-References**
4. A list of related documents will appear.
5. Double-click to open a document

**To add a sticky note:**

1. Open a TA Request document
2. Right-click on the **Request** document and select **Notes, Add Note**
3. Click on **Sticky Note**, select **OK**
4. Type in the white section of the note
5. Click on the 'x' to delete the **Sticky Note** or when done, Log out of OnBase



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June 22, 2016

RE: Onbase Travel Authorizations

All DCRT staff:

All travel authorizations will now be processed through Onbase. The new form can be accessed from Channel Z. With this change we are also implementing new procedures for submitting your requests.

You no longer need to submit hotel or flight information with your Travel Authorization. If you are attending a conference or convention, please continue to submit the conference/convention agenda. This information can be scanned and attached to the request in Onbase.

Agency approvals for the TA will come from your business manager and Assistant Secretary or appointing authority. If the travel is in state and over \$1,000 or requires a special approval the Undersecretary will also approve the TA. All out of state travel will be approved by the Deputy Secretary for the Department regardless of cost.

All employees that have routine travel during the fiscal year will need to submit a routine travel authorization form at the beginning of the fiscal year. There is a drop down box on the Onbase form to select the type of travel authorization.

Travel Expense forms will still be completed in the existing manner, there has been no change to that process.

If you have any questions regarding the travel policy, please contact the Accounting Director, Sondra Sloper at [ssloper@crt.la.gov](mailto:ssloper@crt.la.gov) or (225) 342-8118.