Agency STMS Administrator Manual

Version 5.0

January 2023

The Department of Management Services (DMS) introduced the Statewide Travel Management System, also known as STMS, in the summer of 2018. This system is the State of Florida's first cloud-based travel management solution designed to support the more than 115,000 government travelers and managers located in our state's Executive and Cabinet agencies, as well as the Judiciary.

The system allows travelers to seek authorization to travel and track the status of the request through the system. It alerts users when actions are needed or approvals are granted. The system also alerts travelers when they are paid for travel costs. Approvers are alerted via email when they must attend to forms and fiscal accountants are able to track agency travel spend through this cloud-based system.

CONTENTS

Introduction 5
Agency Administrator Account 5
Account Creation 5
Log in as the Agency Administrator 5
Reassign the Agency STMS Administrator Account 6
User Support 6
Review User Account Information in STMS 7
User Information 7
User Information within the Agency/User FLAIR Codes 10
User Management Functions 11
Changing a Delegated Approver 11
Converting an Account to a NonAD Proxy Traveler 12
Changing the Federation ID 13
Location of UMC field data within STMS 15
Duplicate Provisioning Codes 15
Reports 17
Dashboards 18
View 18
Related Reports 19
Account Details 20
Trip Form Details 20
Transactions 21
Case Management 22
List Views 23
Open a Case 23
Manage Cases 26
Policy Questions 27
Closing Cases 27
Escalating Cases 27
Posts and Comments 28
Case Visibility 29
Knowledge Management 29
Access Knowledge 29

Types of Knowledge Articles 30
Frequently Asked Questions 30
How-To 30
Resource 30
Knowledge Article Creation 30
Files 33
Submit for Approval 33
Continuity Support 34
Resources 34
Contact Information 34
User Account Changes 35
Common Cases in STMS 35
Trip Forms 36
Error Messages 36
Expense Line Items 36
Org Code 37
Approvals 37
Chatter 37
User Accounts 38
Email Notifications 39
User Management 39
Monitoring License Usage 39
User Administrators 39

INTRODUCTION

Agency STMS Administrators (AAs) are a critical component of successful STMS operations. AAs are responsible for monitoring user accounts, trip forms, transactions, cases, and knowledge articles and can access reports. They also provide a key link between the Agency and the STMS Team. This manual provides an overview of the responsibilities of an AA, along with references to additional resources.

AAs will benefit from watching all the Training Videos and reviewing the user materials available for STMS at https://www.dms.myflorida.com/stms. The videos are relatively short and can be watched at your convenience.

AGENCY ADMINISTRATOR ACCOUNT

Account Creation

Agency Administrator accounts are created for each agency by the STMS Team. Many agencies are using a generic Agency STMS Administrator (AA) email account (for example DMS_STMS@dms.myflorida.com). Using a collective email address is recommended by the STMS Team as this provides end users with one email address to contact and the access to the account can be updated if the person serving as the AA changes.

If your agency is not currently using a collective email address and you later decide to change the email address associated with your agency's AA account, please email the updated AA email address to STMS.Support@dms.fl.gov and the STMS Team can update the AA profile.

If your agency is using a collective email address and the person serving as the AA does change, a new account does not need to be created. Instead, reference the section titled "Maintaining the Agency Administrator Account."

Log in as the Agency Administrator

When the AA is ready to login for the first time, the STMS Team sends a system generated email to the AA email address with the username and a link to create a new password.

Once the password is created, the AA logs in from the STMS homepage: https://flstms.my.salesforce.com as shown in *Figure 1* - STMS Login.

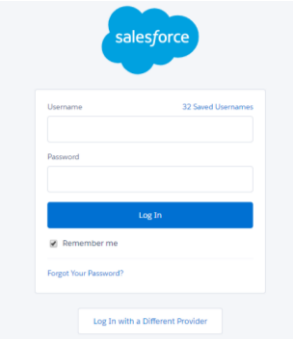


Figure 1 - STMS Login

On the home screen:

- Enter the AA username (e.g.: DMS_STMS@stms.fl). This information is provided within the email asking you to create your password.
- Enter the password you created.

Please send an email to STMS.Support@dms.fl.gov, if you encounter issues logging into STMS as the AA.

Reassign the Agency STMS Administrator Account

To reassign the AA duties and account to another individual, the current AA must create a case in STMS and escalate the case to the STMS System Administrator (SA) as a notification of the change. When creating the case, use the "Issue" case type and provide contact information for the person who will be the new (or acting) AA. You may enter "N/A" in the "Steps to Reproduce" field since that is a required field for the Issue case type. If the new AA has not completed the Agency STMS Administrator User Agreement, attach the completed agreement to the case. Each time the AA is transitioned, the AA account password must be reset.

User Support

STMS has established tiers of support personnel to help keep operations running smoothly. The tiers of support are:

Tier 1 – Agency STMS Administrators (AA)

Tier 2 – STMS Team

This support model relies on each agency's commitment to building internal support capacity to cover Tier 1 needs and answer most day-to-day questions.

Users should submit system issues, questions, and suggestions for enhancements to the AA. The AA evaluates and responds to reported issues and escalates items that they cannot resolve to the STMS Team. User Support may take many forms including reviewing information in STMS and managing Cases. Specific information regarding the management of Cases are detailed later in this document.

Note: Agencies that use trained "Travel Guides" to serve as a first stop for user questions outside of STMS reduce the support workload for the AA.

The STMS Team provides Tier 2 support to agencies and their users by evaluating and responding to items that have been escalated to them by the AAs.

REVIEW USER ACCOUNT INFORMATION IN STMS

As the AA, you can view the information about each STMS user account within your agency. Account information is maintained in two areas:

- User Information – This data relates to the *Traveler Name* field on a Trip Form.
- Agency/User FLAIR Codes – This data relates to the *Traveler/Agency Link* field on a Trip Form.

User Information

Click on the Gear icon on the right side of the screen and select Setup, as shown in *Figure 2*.

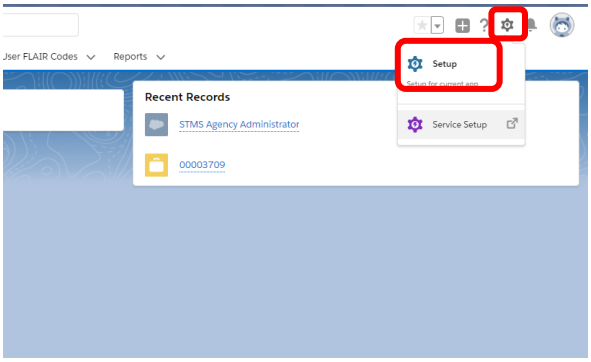


Figure 2 - Setup Menu

On the left navigation bar click on “Users” and then click on the “Users” sub-menu as shown in *Figure 3*.

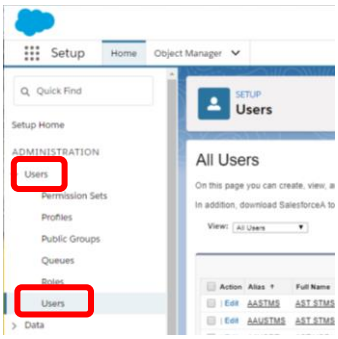


Figure 3 - Users Information

This displays all the users for your agency. You can search for an individual by typing a name in the Search Bar at the top of the screen or by sorting the list based on any of the header row titles as shown in *Figure 4*. Based on the column sorted on, you can then click on a specific letter to display only results that start with that letter

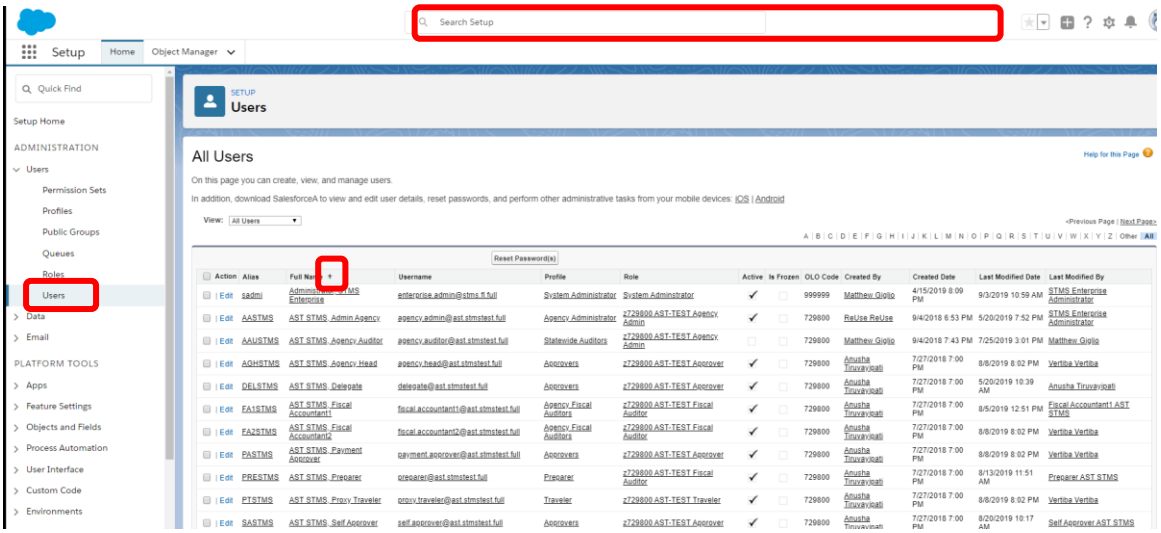


Figure 4 - Searching Users Information

Once you have located the account, click on the user's name to view the account information as shown in *Figure 5* and *Figure 6*, on the next page. The User Information includes:

- Email address – email address associated with Active Directory
- Alias – alias associated with Active Directory – this is the field that displays on the Delegate Approver Report
- Delegated Approver – user-assigned delegate – delegate must be an approver and takes on the permissions of the user and can approve Trip Forms on the user's behalf
- Profile – what user can do in STMS
- Role – what user can see in STMS
- Active Status – not visible within STMS – check UMC for user's Active status
    - For Active Directory-based accounts, if the account has not been provisioned in the UMC, then the Role will be blank and the Profile will be Provisioning Default – occurs when a user is added to the active directory group, but not yet provisioned
- Created By – Information about how and when the account was created
- Last Login – Information about when the account was last accessed
- Modified By – Information about how and when the account was last modified

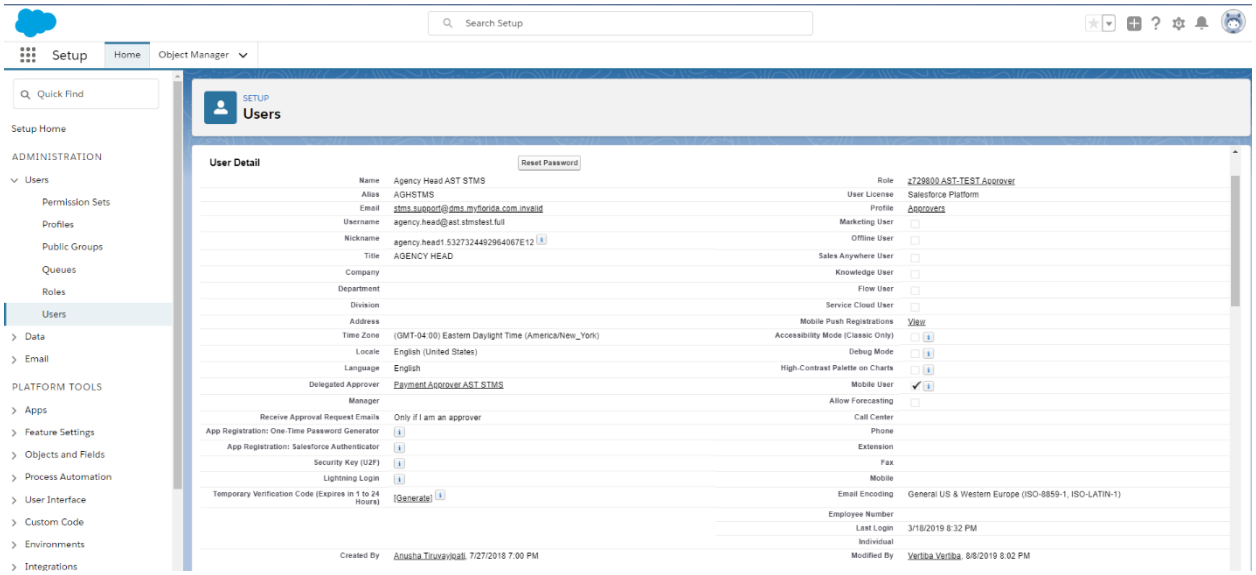


Figure 5 - User Information

- Provisioning Pending – If information sent from the User Management Client, but not yet updated in STMS, this displays as "Yes"
- Disclaimer Status – Indicates if the user has accepted the End User Agreement. All users must accept this agreement prior to accessing STMS for the first time
- Provisioning Code – Displays all the details about their account (string of numbers and letters)
- Delegate Approver is Active – Displays a checkmark if an Approver's delegate is currently active in STMS.
- Fields to indicate if Authorizations and/or Advances and Reimbursements can be approved
- Fiscal Accountant Header Information – this section is only populated for Fiscal Accountants whose T9 information has been provided to the System Administrators – this information should be included in a case and escalated to the System Administrator.

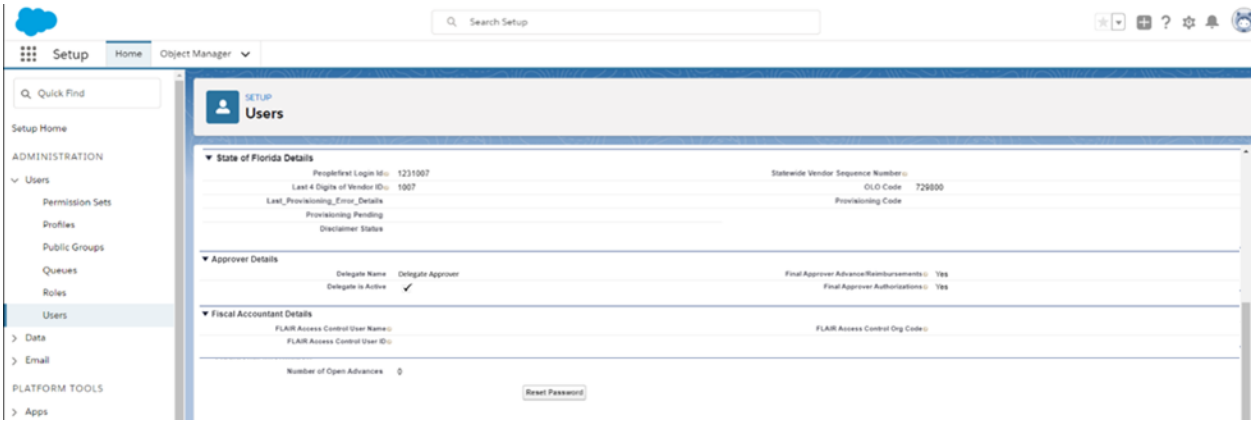


Figure 6- Additional User Information

User Information within the Agency/User FLAIR Codes

The Agency/User FLAIR Code is a user's link to FLAIR within STMS. This link is automatically created when a user account is created through the User Management Client.

To access a user's Agency/User FLAIR Code, enter a user's name in the search bar and the top of any page. Select their name from the options that appear in the search bar, to go directly to the Agency/User FALIR Code. Or select Enter to get complete search results. From the search results, select their name from the results in the Agency/User FLAIR Code section.

Alternatively, you can click on the "Agency/User FLAIR Codes" tab. Select the "All" List View to display all the records for your agency in the List View *Figure 7*.

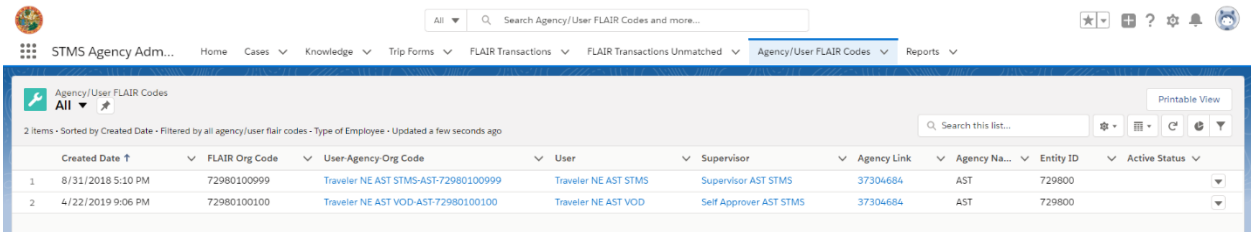


Figure 7 - Agency/User FLAIR Codes

Click on the user's name to open their record. Once you have located the account, click on the user's name to view their account information (Figure 8). Among the information you can view with a record are:

- User-Agency-Org Code – This is the user's name, agency, and default Organization Code.
- FLAIR Vendor Link – This should be associated with the user's name displayed on the record
- Supervisor – This is the user's travel supervisor or first approval in STMS.
- Working Title – This information is populated from People First.
- People First Login ID – Assigned by User Administrator through the UMC.
- Type of Employee – Displays the employee type of State Employee or Non-Employee
- Indicator of Self-Approver – If this is displayed, user can approve their own trip forms
- Proxy Traveler – If "Yes" is displayed, the user cannot log into STMS
- Leadership Status – If "Yes" is displayed, user's trips display on Quarterly Leadership Travel report
- Security flag information – Displays user's security information from People First
    - This information does not display in the UMC for employees, but is visible here
- Last Modified Date and Time
- Trip Forms Associated with the User

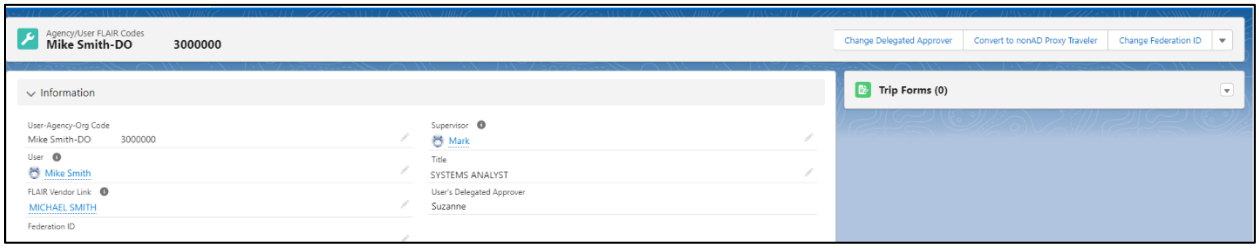


Figure 8- Agency/User Code Details

User Management Functions

Within an Agency/User FLAIR Code, 3 actions can be performed to update a user's account information.

- Change an Approver's Delegated Approver
- Convert a user to a non-AD Proxy Traveler
- Change a user's Federation ID (Object ID)

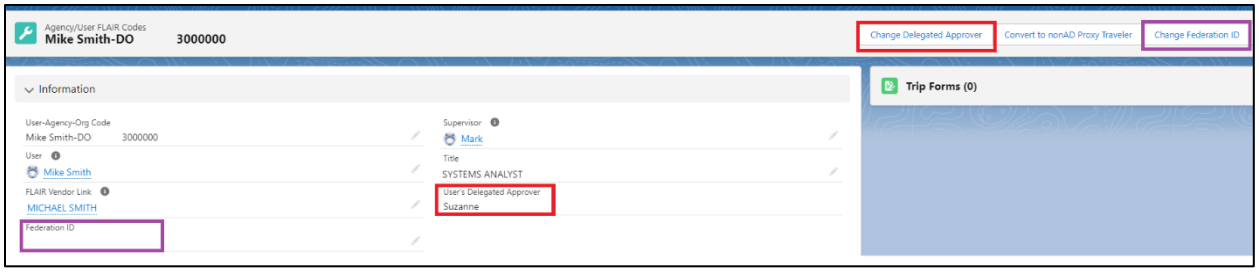


Figure 9 - User Management Functions

Changing a Delegated Approver

A user's current delegate approver is displayed in the **User's Delegated Approver** field, shown on Figure 9. If the user is currently an Approver in STMS, then the **Change Delegated Approver** button is displayed on the upper right corner of the screen, as highlighted in Figure 9.

Clicking the **Change Delegated Approver** button opens a new pop-up window to search for the new delegated approver. (Figure 10)

Figure 10 – Change Delegated Approver

After typing in at least two characters of the new approver's first or last name a drop-down menu will be shown on screen which includes the name, title and email of potential matches. Select the appropriate person and click the Save button to change the delegated approver. This change will automatically email the approver, the new delegate, and the former delegate. The newly delegated approver will gain visibility to pending trip forms within 10 minutes.

Converting an Account to a NonAD Proxy Traveler

Inactive, Active Directory-based STMS accounts can be reactivated and converted to Non-AD proxy travelers. An account must be inactive in STMS, be an AD-based account, and previously been fully configured in the UMC to be eligible. An administrative account (Reporter or Auditor) can only be converted if the person does not also have a functional account.

Click on the **Convert to NonAD User** button to begin the process and open a pop-up window.

First the account will be evaluated to determine if it is eligible to be converted. Ineligible accounts will contain a message detailing why the account is ineligible to be converted, for example, if the account is active (Figure 11) or has previously been established as a non-AD account.

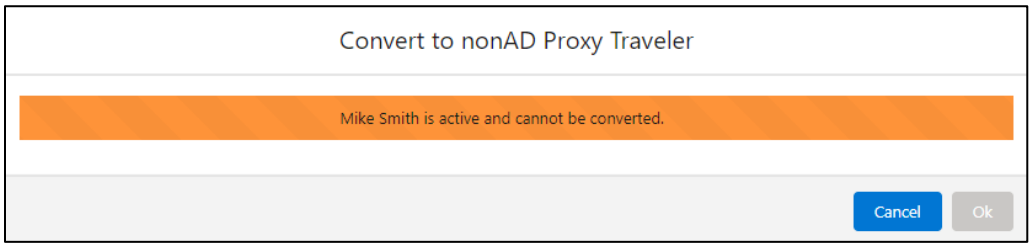


Figure 11 – Cannot be converted to a nonAD Proxy Travler

If an account is eligible to be converted, you will be asked to confirm that you want to proceed. (Figure 12)

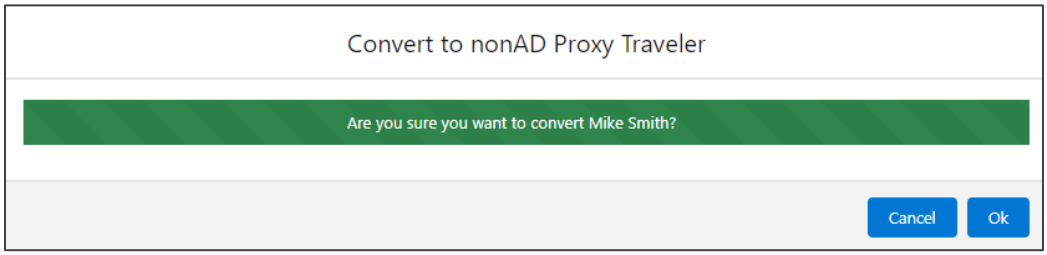


Figure 12 – Confirm to proceed with the conversion to a nonAD Proxy Traveler

After STMS successfully converts and reactivates the account, a confirmation message displays near the top of the screen (Figure 12Figure 13).

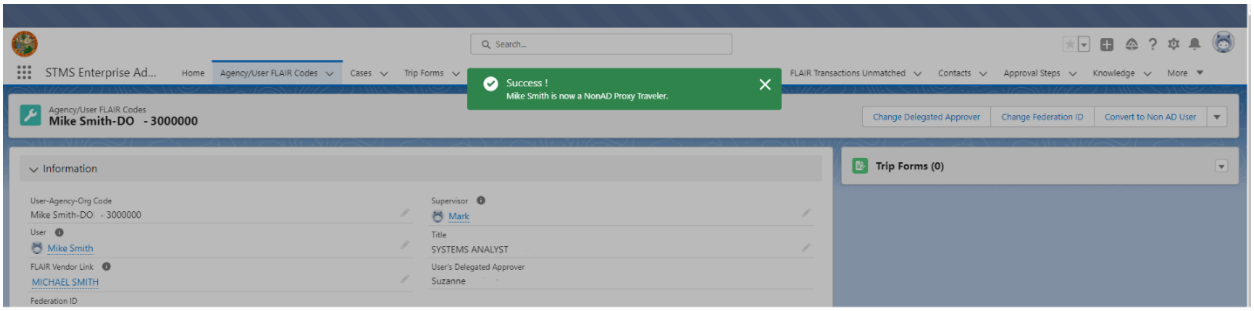


Figure 13 - NonAD Conversion Success Message

Changing the Federation ID

Note: This information provided in this section should be used by agencies that use Azure Active Directory, only. CyberArk accounts do not operate the same way. Agencies utilizing CyberArk should contact the STMS Support Team if they believe a new Federation ID is needed

What is the Federation ID?

The Federation ID is a term used by Salesforce to uniquely identify an account based on a value received from an agency. A Federation ID determines what STMS account an Active Directory user is logging into and what STMS account Active Directory will provision updates to. For AzureAD agencies, the AzureAD Object ID is the Federation ID in Salesforce. For CyberArk agencies, the Active Directory Object ID is the Federation ID.

When should a Federation ID be updated

If an STMS user leaves the agency and comes back or is given a new AD account for any reason, the Federation ID field in STMS must be updated with the new Object ID.

The update takes place after the old AD account is removed from the Azure STMS Users group and **before** the new Azure account is added to the Azure STMS Users group.

When the Federation ID is being updated, it is critical that the correct account is being updated. For employee account the PeopleFirst ID will display in the pop-up window, for non-employee's the last 4 digits of their SSN will display. Please verify this information before proceeding. Changing the Federation ID on the wrong account will impact multiple accounts and require the support of the STMS Team to resolve the issue. **If you cannot locate an Agency/User FLAIR Code for a user, please contact the STMS Support Team.**

Using the Change Federation ID Function

Only inactive user accounts can be updated. Clicking the **Change Federation ID** button (Figure 9) opens a new pop-up window to enter a new Federation ID. (Figure 14)

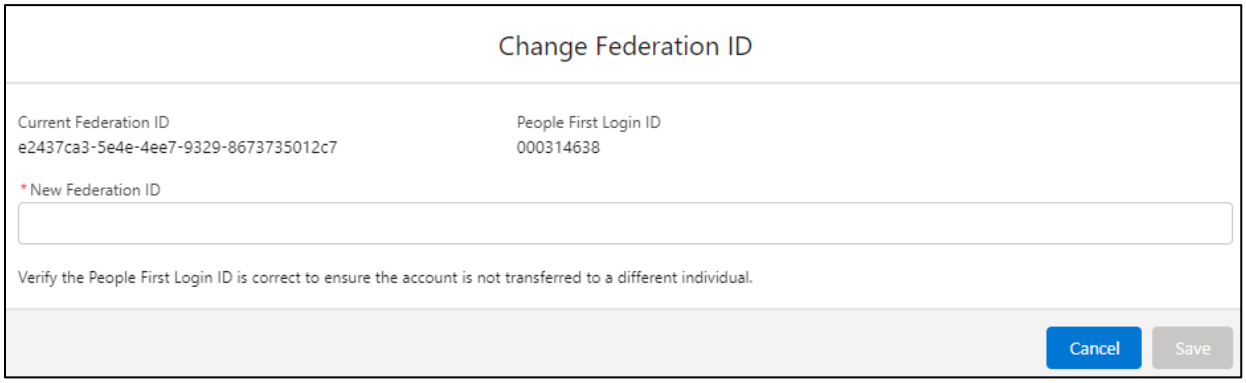


Figure 14 - Change Federation ID

Verify the account you are updating is displaying the correct People First ID/Last 4 SSN for the user. Then enter the new Federation ID in the ***New Federation ID field.** The information entered in this field must be in the correct format, otherwise an error message will display.

After the new Federation ID has been saved, please allow a few hours for the account to sync and reactivate.

Location of UMC field data within STMS

You can verify that UMC changes have synced by reviewing the Last Modified Date Fields within the User information in Setup and Agency User FLAIR Codes areas. The table in *Figure 15* includes the fields that are available in the UMC and their corresponding location in STMS.

Field Name	Location within STMS
First Name	User Information
Last Name	User information
Email Address	User information
People First ID	User information and Agency/User FLAIR Codes
FLAIR Org Code	Agency/User FLAIR Codes
Profile	User information
Role	User information
Last 4 SSN	User information (displays last 4 of PFID for employees)
Vendor Sequence #	User information
Supervisor	Agency/User FLAIR Codes
Working Title	Agency/User FLAIR Codes
Headquarter City	Agency/User FLAIR Codes
Headquarter State	Agency/User FLAIR Codes
Headquarter is home?	Agency/User FLAIR Codes
Leadership flag	Agency/User FLAIR Codes
Sworn	Agency/User FLAIR Codes
Protected	Agency/User FLAIR Codes
Restricted	Agency/User FLAIR Codes
Restricted Relative	Agency/User FLAIR Codes
Employee/Non-employee	Agency/User FLAIR Codes

Figure 15 - Verifying UMC Updates

Duplicate Provisioning Codes

When a user account is created or edited, the account details are encrypted in a single code, called the provisioning code. No two accounts should have the exact same information, so STMS will not allow multiple accounts to have the same provisioning code. If a new account is created, and the provisioning code for the new account matches the provisioning code for an existing account, STMS detects that potential duplication and prevents the code for the new account from being written into STMS. The agency must make corrections to the user's account via the UMC for their account to properly update.

A list view has been created that allows AA's to view any accounts that have a duplicate provisioning code. To view this list, click on the Gear icon on the right side of the screen and select Setup, as shown in *Figure 16.*

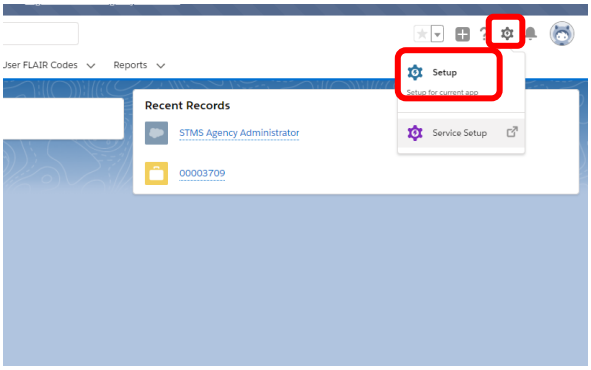


Figure 16 - Setup

From the left navigation bar click on "Users" and then click on the "Users" sub-menu as shown in Figure 17

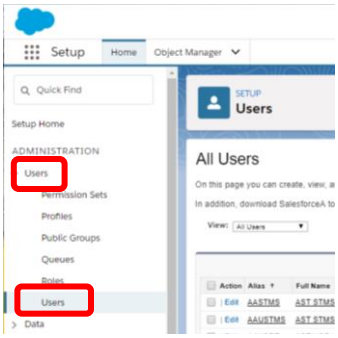


Figure 17 - Users Information

Then click on the drop-down menu for View as shown in Figure 18 and change the selection to "Provisioning Duplicate".

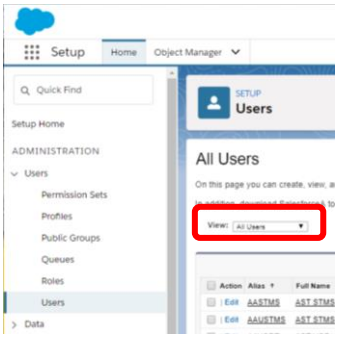


Figure 18- User List Views

The resulting list displays all the accounts that contain a duplicate provisioning code to an existing account. After information for accounts included in this list are updated, the affected accounts no longer appear in this list view.

REPORTS

Several reports are available within STMS to provide agencies with information about user accounts, trip forms, and transactions. To access Reports, click on the Reports tab, shown Figure 19.

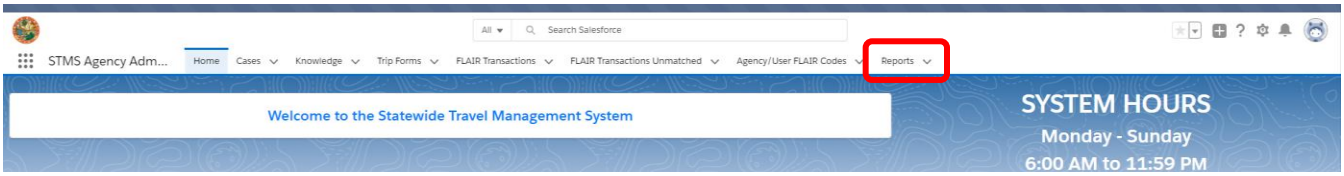


Figure 19 - Reports Tab

AAs have access to reports within STMS. To view all the available reports, click on the "All Reports" button on the left side of the screen and then scroll through the list as shown in Figure 20. Alternatively, you can search the available reports by typing within the search bar.

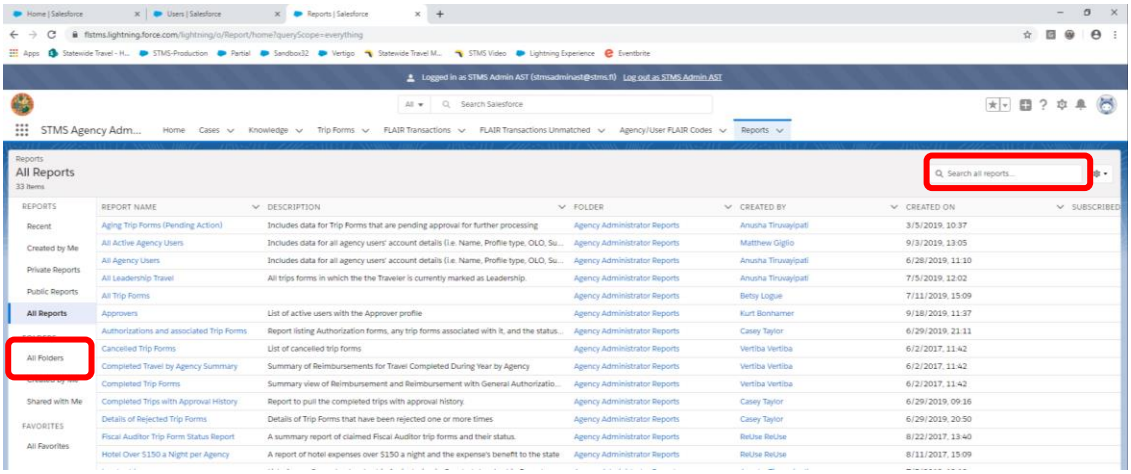


Figure 20- Available Reports

After an individual report is selected, there are some features that allow for additional functionality.

- "Add Chart" button allows for the report data to be shown in a graphic. Some reports have an "Add Chart" button.
- "Filter" (funnel icon) button allows for filtering the data in the report.
- "Export" button allows for the export of the report to Excel.
- Links in the report may navigate to specific details of the record. **Note:** If you are sharing an exported report, only users with access to the record are able to view the details when clicking on a link.

DASHBOARDS

A new tab has been added to the navigation at the top of the screen for Dashboards. Dashboards are available for Agency Administrators. A dashboard provides a visual display of multiple reports. Clicking on the Dashboards tab will display the titles of the dashboards available. The Dashboards tab is next to the Reports tab.

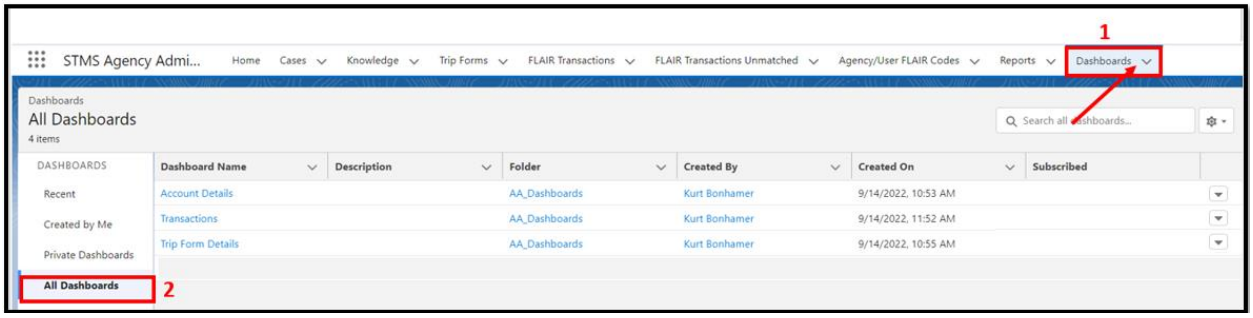


Figure 21 - Dashboards

View

1. Click the Dashboards tab to view the dashboards available. (Figure 21)

a. Click the dropdown arrow on the Dashboards tab to view the list of dashboards you have recently opened. (Figure 22)

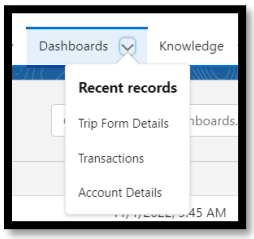


Figure 22 - Dashboards Recent Records

2. After clicking the Dashboards tab, click All Dashboards on the left navigation.

NOTE: The last date the dashboard was refreshed displays under the dashboard name. (Figure 23) Each time a dashboard loads, it will initially load and display old numbers for context. Details on the upper left side of the dashboard will display when the dashboard was last updated. To view the current data in the dashboard, click the **Refresh** button on the right side.

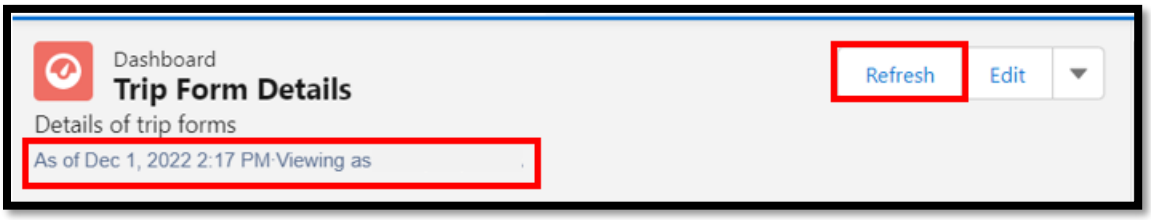


Figure 23 - Dashboard Details and Refresh

Related Reports

To view the report related to a component on the dashboard, click the link in the lower left corner of that component. The report can also be viewed by clicking the Reports tab and searching for the report name. (Figure 24)

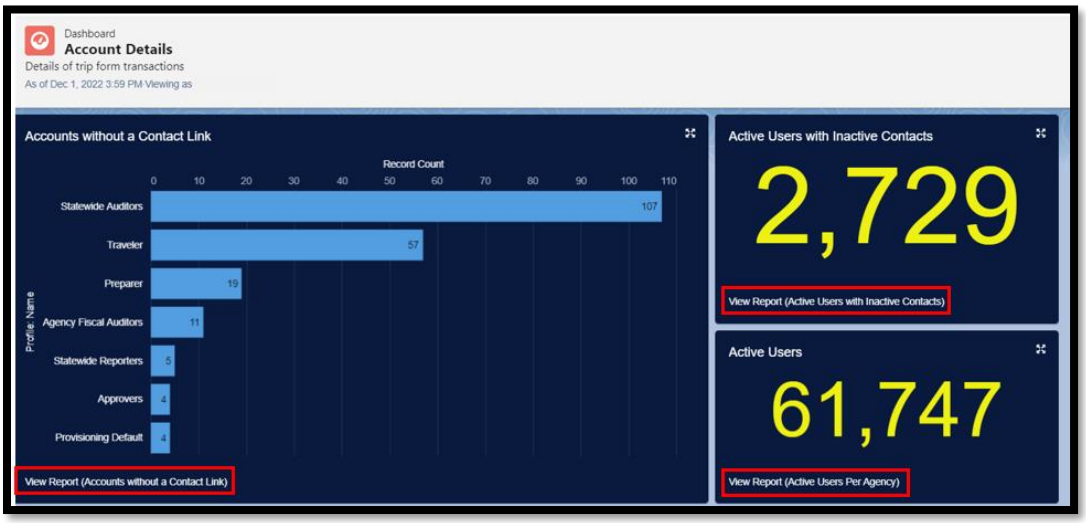


Figure 24 - Dashboards and Related Reports

Account Details

The Account Details dashboard displays details about common reports for user accounts in STMS. (Figure 25)

1. **Accounts without a Contact Link** – The bar chart displays the number of account by profile name that are missing a contact link.
2. **Active Users with Inactive Contacts** – Displays the number of active users with inactive contact records.
3. **Active Users** – Displays the number of active users in the agency.

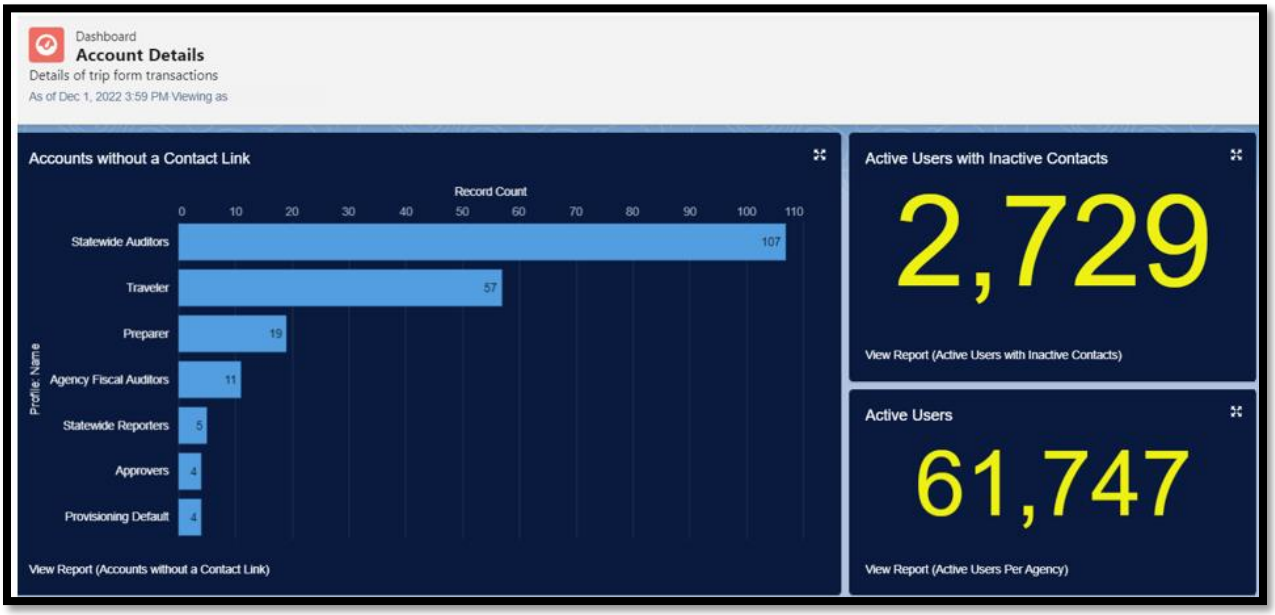


Figure 25 - Account Details Dashboard

Trip Form Details

The Trip Form Details dashboard displays details about common reports for trip forms in STMS. (Figure 26)

1. **Trip Forms Pending Action** – The donut chart displays the number of approval steps for trip forms pending action grouped by status.
2. **Forms with Transactions in Process** – The donut chart displays the number of trip forms with transactions that are in process and grouped by fiscal accountant.
3. **Forms Updated to "FLAIR Paid" Today** – Displays the number of trip forms that were updated to "FLAIR Paid" today.
4. **Trip Forms Pending FA Assignment** – Displays the number of trip forms that are waiting to be assigned to a fiscal accountant.
5. **Approval Email Request Reminders –** Displays the number of emails sent out to approvers that have not been approved in the last week.
6. **Trip Forms Rejected by FA** – The bar chart displays the number of trip forms rejected by a fiscal accountant.
7. **Traveler Owes State** – The bar chart displays the amount the traveler owes the state.

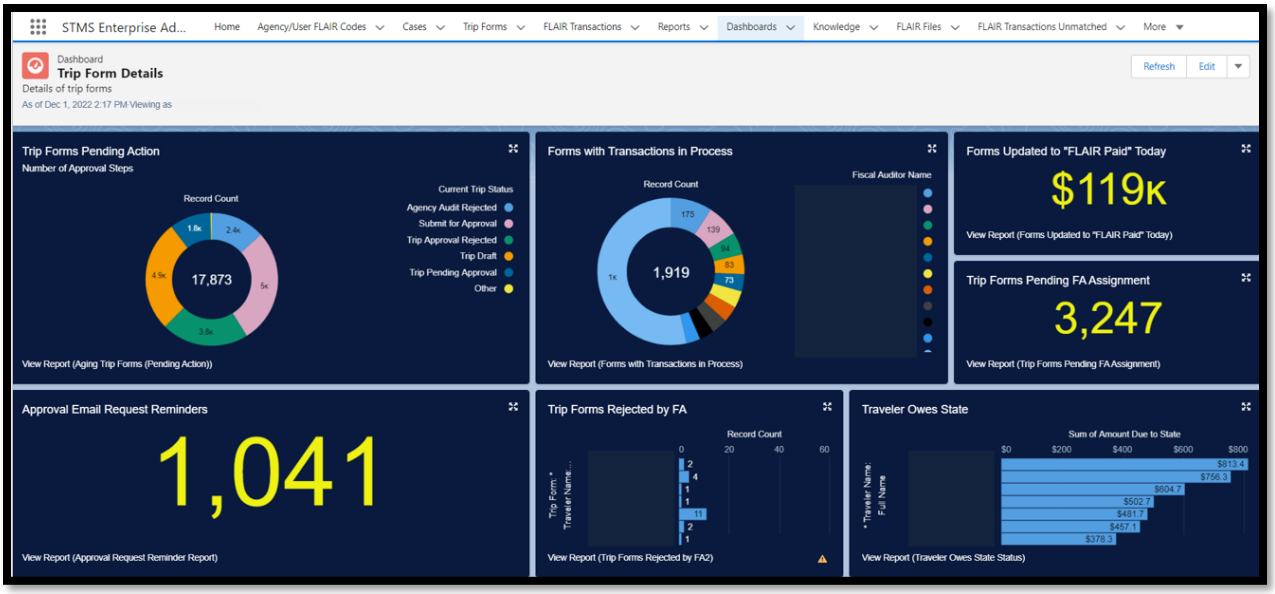


Figure 26 - Trip Form Details Dashboard

Transactions

The Transactions dashboard displays details about common reports for transactions in STMS. (Figure 27)

1. **Pending FLAIR Transactions** – The donut chart displays the number of transactions pending FLAIR transactions, grouped by status.
2. **Submitted to FLAIR** – The bar chart displays the number of FLAIR transactions submitted by fiscal accountant.
3. **FLAIR Ready for Submission** – Displays the number of transactions marked as FLAIR Ready for Submission. This count will increase as the day progresses until 3:00 PM.

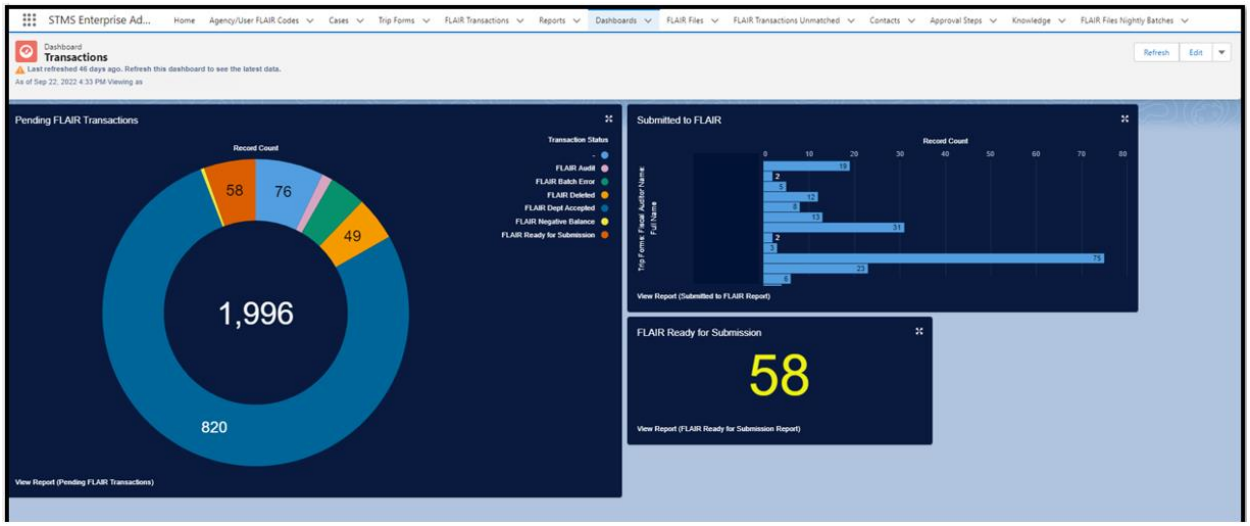


Figure 27 - Transactions Dashboard

CASE MANAGEMENT

The Case Management functionality in STMS enables users to communicate issues, suggestions, and questions relating to system functionality and to submit Knowledge article and report requests. All users are able to create cases, but AAs, and STMS Team,have access to edit, escalate, and close cases.

Cases submitted by an agency user are first directed to the agency queue for review and resolution (Tier 1 Support). Any cases that cannot be resolved at the agency level should be escalated by the AA to the STMS Team (Tier 2 Support). Each case is managed by the support tier that currently owns the case. The current owner is responsible for ensuring that the case either is resolved or reassigned to the next support tier.

To access Cases, click on the Cases tab from the menu options located near the top of the screen. From the Cases tab, you can create a new case or check the status, escalate, or close an existing case.

List Views

AAs can view all cases for their agency. The List Views provide a filtered list of cases within an agency as displayed on Figure 28

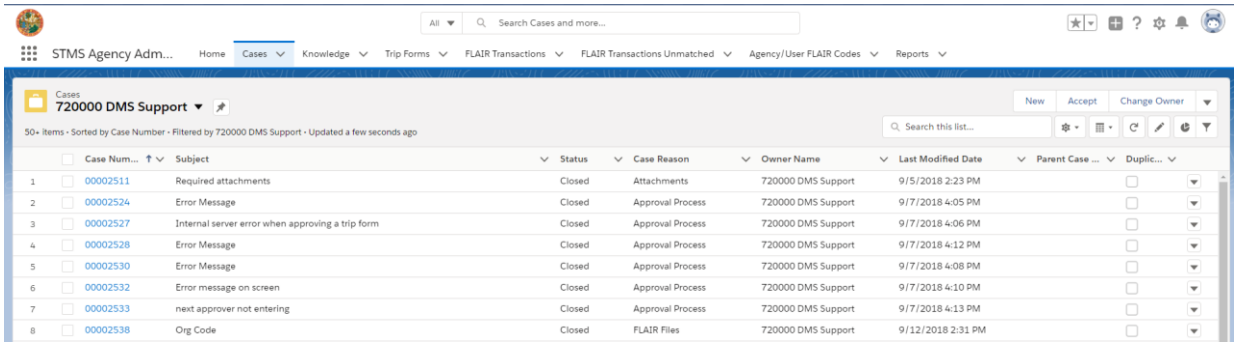


Figure 28- Cases Queue

List Views available to AAs include:

- *Agency Name* List View – Displays all cases in your queue for your action. The exact name of this view reflects your agency OLO Code and agency abbreviation (e.g., 720000 DMS Support).
- All Cases – Displays all cases that have been created.
- All Open Cases – Displays all open cases that have been created.
- My Cases – Displays all cases where you are listed as the Owner.
- Open Active Cases SA – Displays all escalated cases currently in the System Administrator (STMS Team) queue.
- Recently Viewed – Displays all cases you have recently viewed.

Once a list view is displayed, you can choose that view to be the default list view that displays when you open the Cases tab by clicking the push pin icon located next to the name of the List View.

Open a Case

To create a new case, click the “New” button found on the right side of the page near the top as displayed in *Figure 29*.

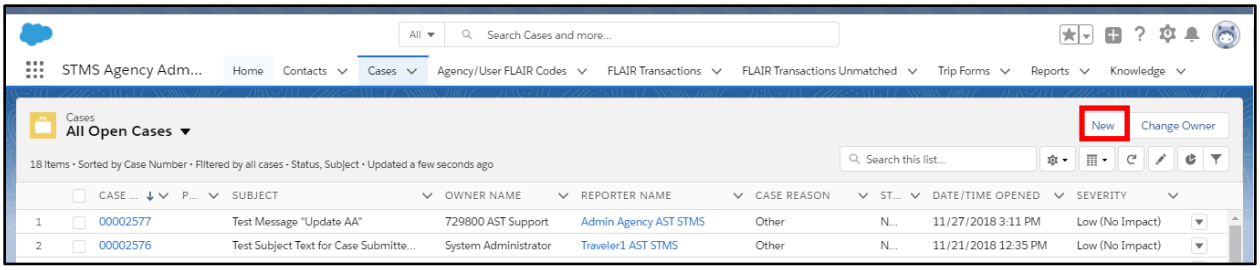


Figure 29 – New Button on Case List View

In the New Case popup, enter case information in each field as necessary, as displayed in Figure 30. Required fields are marked with a red asterisk (*).

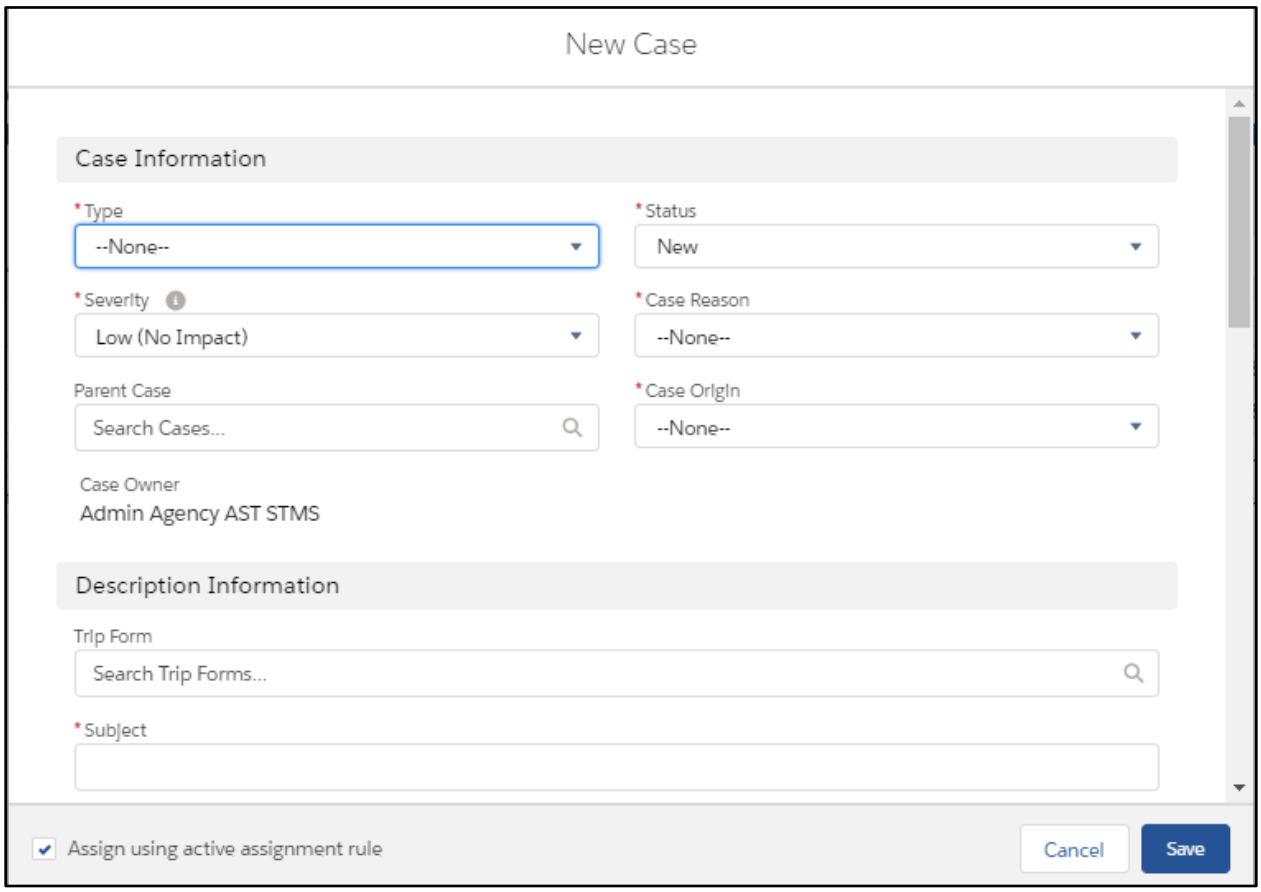


Figure 30 - New Case Popup

The fields to create a new case are as follows:

- *Type – Identifies the purpose of the case.
    - Admin Assist - an agency user or the AA is requesting administrative assistance from the STMS Team
    - Issue – system not working as designed
    - Report Request – information request from the system – only the STMS Team can create reports for agencies
    - Question – system- or travel-related information request
    - Suggestion – information that would be helpful to other users
    - Enhancement – current functionality not available
    - Knowledge Article – proposed information to share with agency/statewide

- *Status – Identifies status of case in lifecycle. Defaults to New upon creation.
    - New – initial submission status
    - In Progress – identifies when administrator is working on a case
    - Escalated – case sent to next level of support
    - Plan in Place – solution identified, but not implemented in STMS

    - Waiting on Client – solution or question communicated – need user feedback
    - Testing in Sandbox – solution deployed to sandbox and ready for testing
    - Ready for Deployment – solution passed sandbox testing; ready for deployment
    - Testing in Production – solution deployed in production; testing in production
    - On Hold – not able to address the issue currently
    - Closed – issue has been resolved
    - Cancelled – case created in error
- *Severity – Identifies immediacy/urgency of the case.
    - Critical – System has stopped working
    - Urgent – System functionality limited and no workaround
    - High – System functioning with temporary workaround
    - Medium – Feature functioning with temporary workaround
    - Low – Questions, suggestions, documentation
- *Case Reason – Indicates a category for case – select the best category for the case
    - Approval Process
    - Attachments
    - Delegate Approver Change
    - Expense Line Items
    - FLAIR Files
    - FLAIR Transactions
    - Form Data Change
    - Form Status Change
    - Help Text
    - Knowledge
    - Mission Critical Statements
    - Preparer Change
    - Proxy Conversion
    - Personal Settings
    - Reports
    - T9 Credentials
    - Trip Forms
    - User Management
    - Other
- Parent Case – Indicates a higher-level case that is related to this case. If multiple cases are related, assign first case as parent case.
- *Case Origin – How the issue was communicated to person entering the case.
    - Email
    - Phone
    - Self Entry
    - Walk In
- Case Owner – name of the user creating the case (auto populated).
- Trip Form – Trip Form ID associated with the case. This is a numeric field – when you start typing the trip form number, STMS auto populates Trip Form numbers for you to select and link the trip form to the Case.
- *Subject – Descriptive title of case – provide a unique, concise description of the issue.

- *Description – Background summary of the case – provide additional details to include the user experiencing the issue, the user's role/profile, screenshots of the error message or fields displayed on screen.
- Steps to Reproduce – Steps to recreate the issue – provide detailed steps on the error, when the error occurred (what role is the user, what action is the user taking, when is the error occurring)
    - If Issue is selected as the Case Reason, then this field is required.
- Resolution – describes how the case was resolved – this field is used when the resolution for the case has been established and is a required field when closing a case.
- *Reporter Name – User who reported the issue/question/suggestion. Start typing in the search box to see a list of names.
- Reporter's Phone – Phone number of user who reported the issue/question/suggestion.

After you enter the information, you will notice that the "Assign using active assignment rule" check box is checked. If the box is checked, new cases created by the AA are immediately escalated to the STMS System Administrator queue when you click on the "Save" button. If the box is unchecked when you click on the "Save" button, the case remains in the agency queue. Once the Case is saved, a case number is assigned.

If you are entering multiple cases, after completing the Case creation form, click "Save & New" and the current case will be saved (and submitted if the "Assign using active assignment rule" is checked) and a new case creation form will display.

Manage Cases

When a user (other than the AA) creates a case, it is automatically assigned to the AA and a notification email is sent to the AA stating the case has been created. The cases assigned to the AA displays in your Agency Queue (e.g., 720000 DMS Support). You can change between queues by clicking on the dropdown icon for the list view as displayed in Figure 31

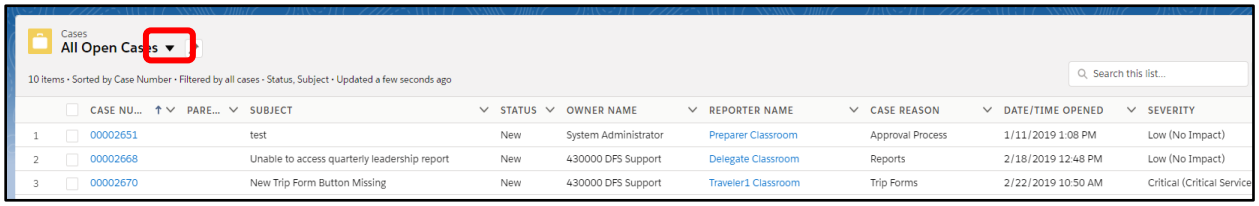


Figure 31 - Agency Queue

The AA reviews the case by clicking on the Case Number link and determines the appropriate follow-up action. The AA is responsible for first-tier troubleshooting and ensuring that the Case has all the information needed for subsequent tiers of support to productively engage with the Case if escalation is necessary – e.g.; Trip Form # (if applicable), Screenshots, user names, and Steps to Reproduce. The AA should also review the subject line and description to ensure that they have provided as much information about the issue the user is encountering. If needed, AAs can request additional information through Posts within each Case. Please navigate to "Posts and Comments" section of this document for additional details on how to add a post.

Once the AA has all the necessary information to evaluate the Case – they can close the case or escalate the case to the STMS System Administrator queue.

Policy Questions

Some cases assigned to the AA may pertain to agency-related policies and procedures. The AA is responsible for managing these Cases. Once a solution is identified, the AA will close the case and include the resolution in the Resolution field.

Closing Cases

When a resolution is reached for a case by the AA, the AA can click on the pencil icon at the right end of the *Status* field and select “Closed” from the dropdown menu (Figure 32). Information on how the case was resolved must also be included in the Resolution field.

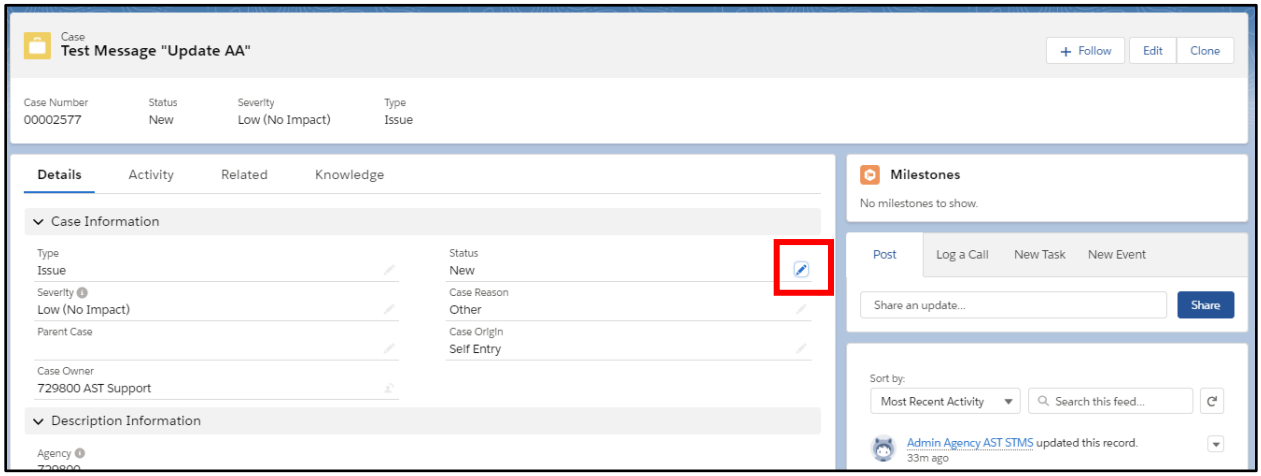


Figure 32 – Case View Showing Pencil Icon on Status Field

Escalating Cases

To escalate a case to the STMS System Administrator (SA), click on the Case Number to access the case. Next, at the right end of the Case Owner field, click the Change Owner icon. (Figure 33 - Case Owner)

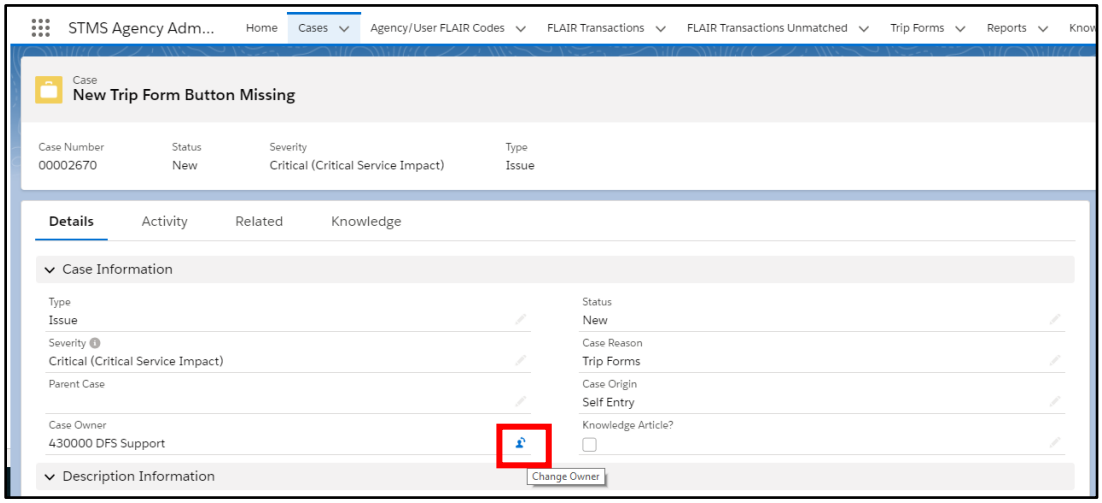


Figure 33 - Case Owner

In the Change Case Owner popup, click the dropdown and select Queues shown on *Figure 34*.

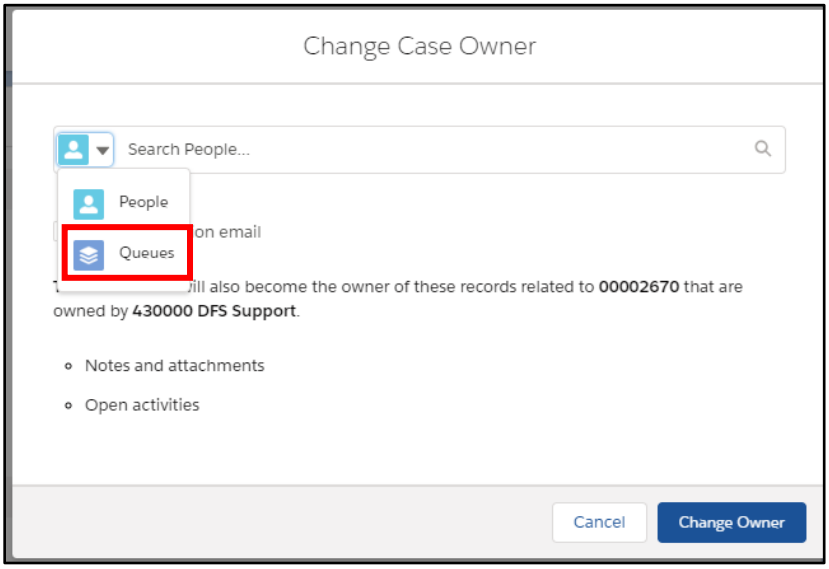


Figure 34 - Change Case Owner

Begin typing “System Administrator” in the search box. Select System Administrator and check the Send notification email check box. Finally, click the “Change Owner” button.

Once the case is escalated to the System Administrator Queue, the STMS Team evaluates the case and attempt to resolve.

Posts and Comments

When viewing, closing, or escalating a case, you can request additional information from the Case reporter or pass information to others who have access to the case, such as Tier 2 support through the Post feature. Add a post by typing in the “Share an update” box under the Post tab and clicking the “Share” button. Add a comment by typing into the “Write a comment” box under an existing comment and clicking the “Comment” button, highlighted in *Figure 35*. A user can be tagged in a post by typing “@Name”. The Case posts function is similar to Chatter Feed in Trip Forms. In addition, files, such as screenshots, can be added to the post by clicking on the paperclip icon. A history of past posts, and Case statuses display in this area, as well.

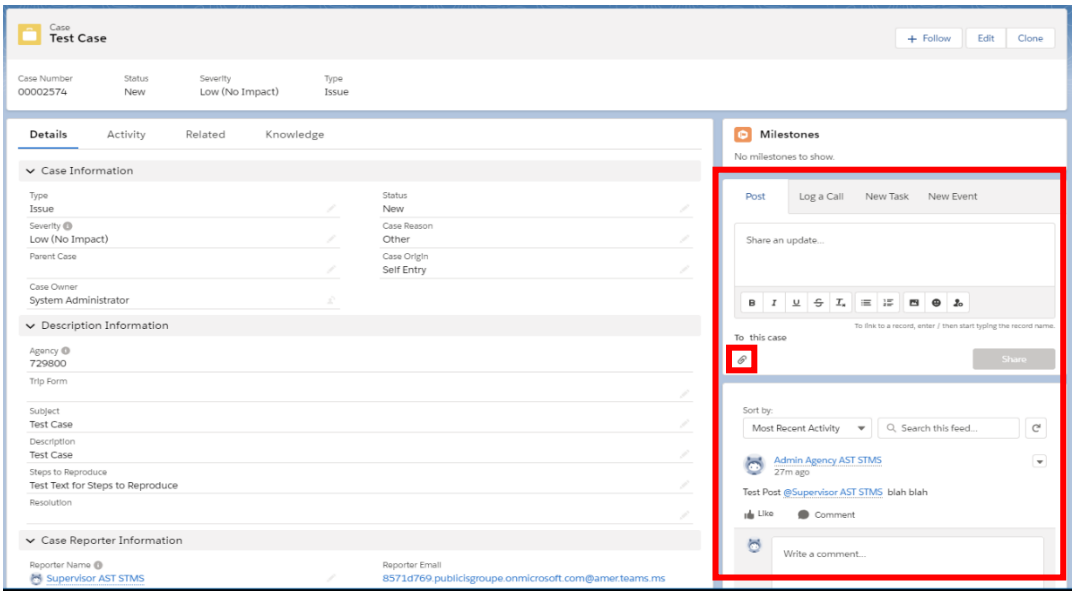


Figure 35 – Post Tab Comment Box and Activity Feed Showing a "Write a comment" Box

Case Visibility

Cases are visible to the listed Case Reporter, the reporter's AA, and Tier 2 support.

KNOWLEDGE MANAGEMENT

Any user can propose a topic or article be added to Knowledge by submitting a Case (see above) and indicate the Type field as Knowledge Article. Knowledge content must be submitted by the AA to the STMS Team for review and publishing.

Access Knowledge

To access existing Knowledge articles or to draft and submit new articles, click on the Knowledge tab near the top of the page, as shown in *Figure 36.*

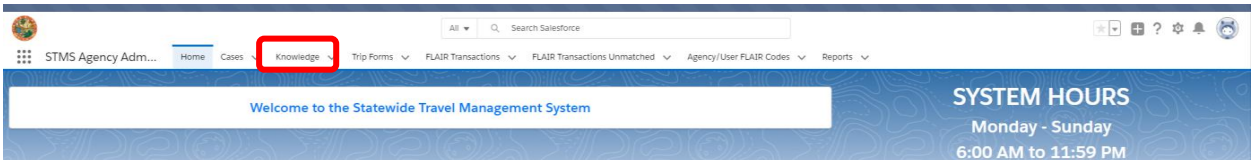


Figure 36- Knowledge Tab

Types of Knowledge Articles

Knowledge Articles are available within STMS to assist users. There are three types of Knowledge Articles: FAQ, How-To, and Resource.

Frequently Asked Questions

Frequently Asked Questions (FAQ) are topically organized Knowledge Articles designed to anticipate a user's questions. They typically are informational only and are not designed to walk a user through a process. FAQ articles are written in a question-and-answer format.

How-To

How-To articles are action-based Knowledge Articles designed to walk a user through an action or actions to accomplish a specific task. How-To articles are written as a description of the action and include step-by-step instructions.

Resource

Resources are stand-alone items of interest related to STMS, such as an agency travel policy.

Knowledge Article Creation

To create a Knowledge Article, click on the "New" button in the upper right corner of the Knowledge article list view, as highlighted in *Figure 37* or select New Knowledge under the Knowledge dropdown.

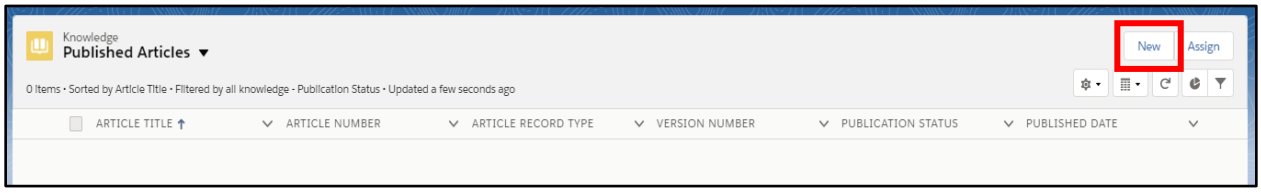


Figure 37 – New Button on Knowledge List View

Select the type of Knowledge Article and click the "Next" button, as displayed in *Figure 38*

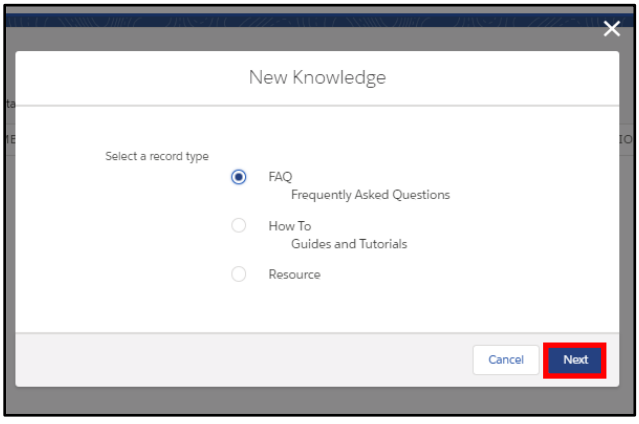
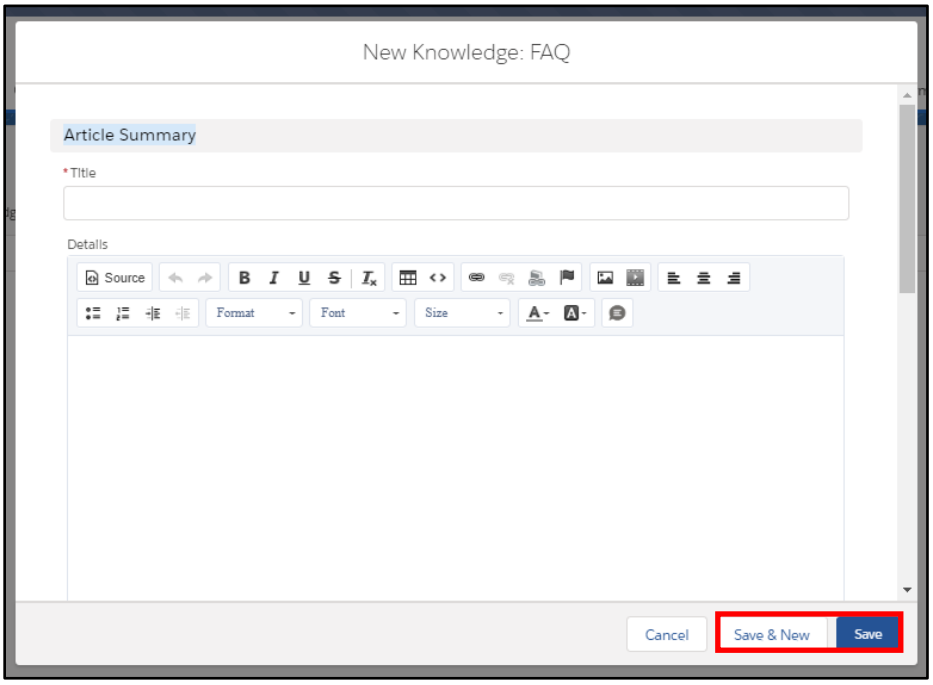


Figure 38 – New Knowledge Record Type Selection Popup

Supply the requested information in the New Knowledge Article popup and click the “Save” button to proceed or “Save and New” button to prepare another knowledge article, as highlighted in *Figure 39*.

Figure 39 – New Knowledge Article (FAQ) Popup



Categories provide quick search terms and determine visibility for the Knowledge Article. **If this section is left blank, AAs from other agencies will be able to see draft and published Knowledge Articles**

To add Categories to a Knowledge Article, click on the arrow to the right of the Categories section, as shown in *Figure 40,* and select Edit. The Edit Articles Categories pop-up window is now available.

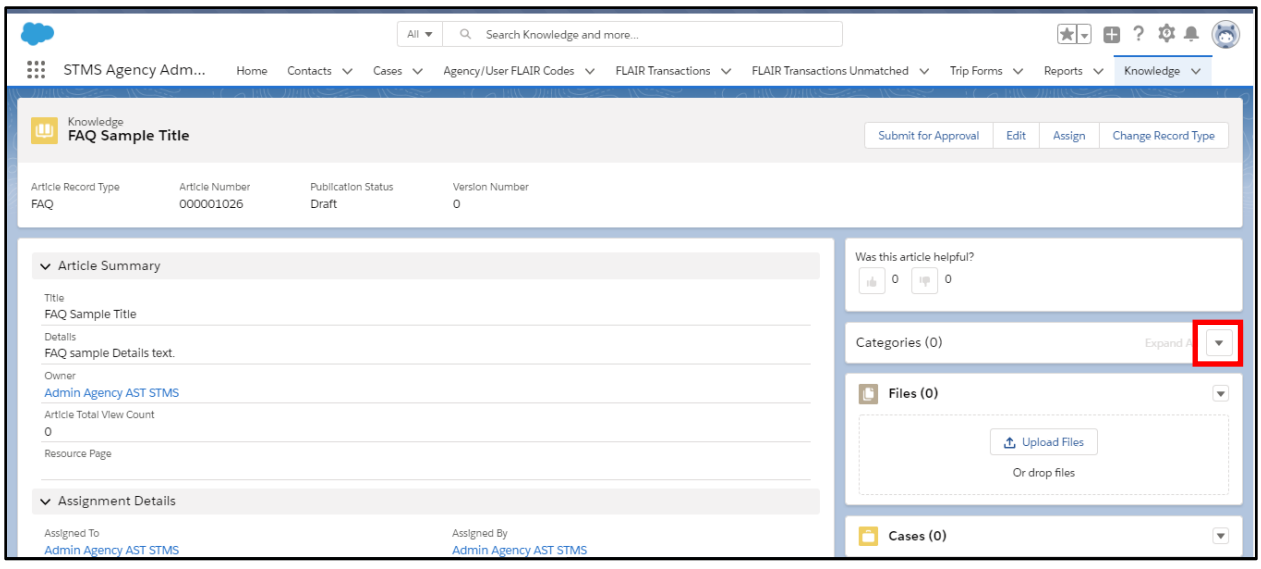


Figure 40 – Categories Dropdown on Knowledge Article

Click on the STMS dropdown menu, STMS key terms display. Select the appropriate key terms.

Click on the Visibility dropdown menu to. identify who should have access to this knowledge article. If this is an agency-specific Knowledge Article, click on the Agencies and Departments drop down and select your agency. If the Knowledge Article should be viewed by all state agencies you can click on the Statewide checkbox. If the knowledge article is for AAs, select the checkbox. **If no selection is made within the Visibility drop-down menu, AAs from other agencies will be able to see draft and published Knowledge Articles.**

In the Edit Article Categories popup click STMS to expand the available categories and check one or more categories. Selecting the check box next to your agency limits the visibility to users within your agency. Select Agency Admins Only or Statewide shares the draft article with other Agency Admins or Statewide, respectively. Once the selection is made, click the "Save" button, highlighted in *Figure 41*.

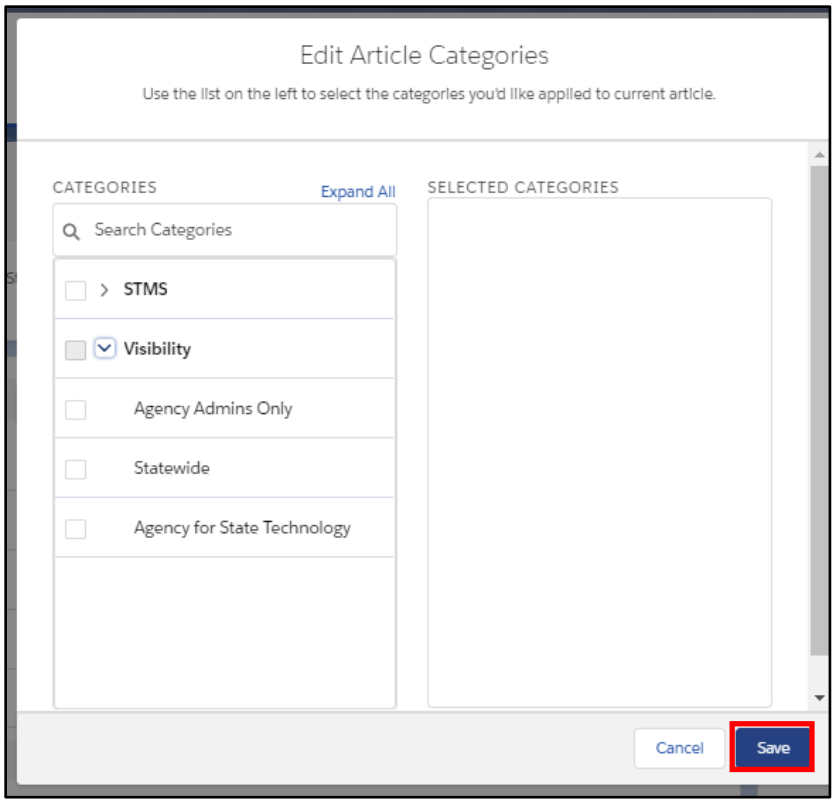


Figure 41 – Edit Article Categories Popup

Files

A Knowledge Article may need supporting files. To upload a file, click on the “Upload Files” button on the right side of the screen, as shown in *Figure 42*. Navigate to the file and upload.

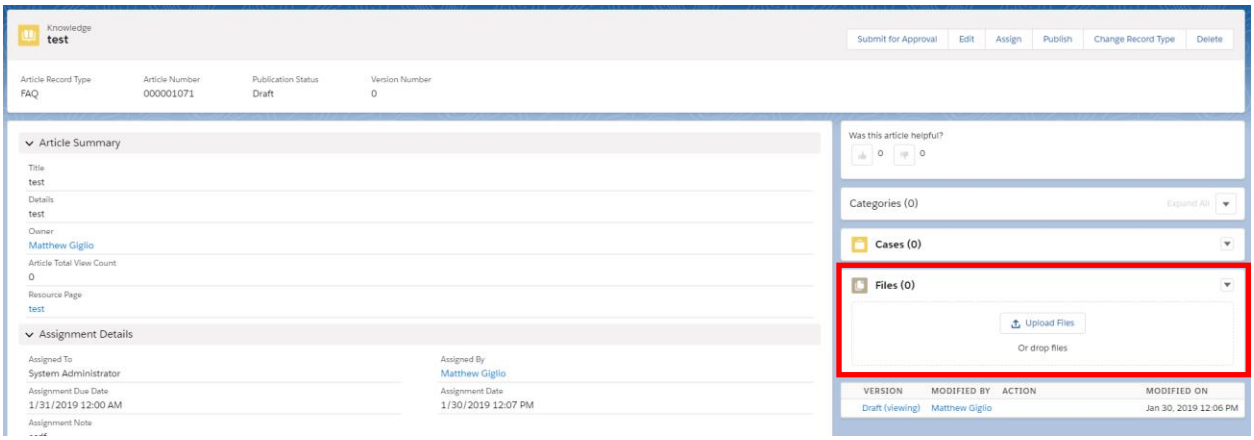


Figure 42 - Upload Files for Knowledge

Submit for Approval

After establishing the categories and visibility, you may submit the draft content to the STMS Team for review and publication by clicking the “Submit for Approval” button in the article’s header bar, as shown in *Figure 43*.

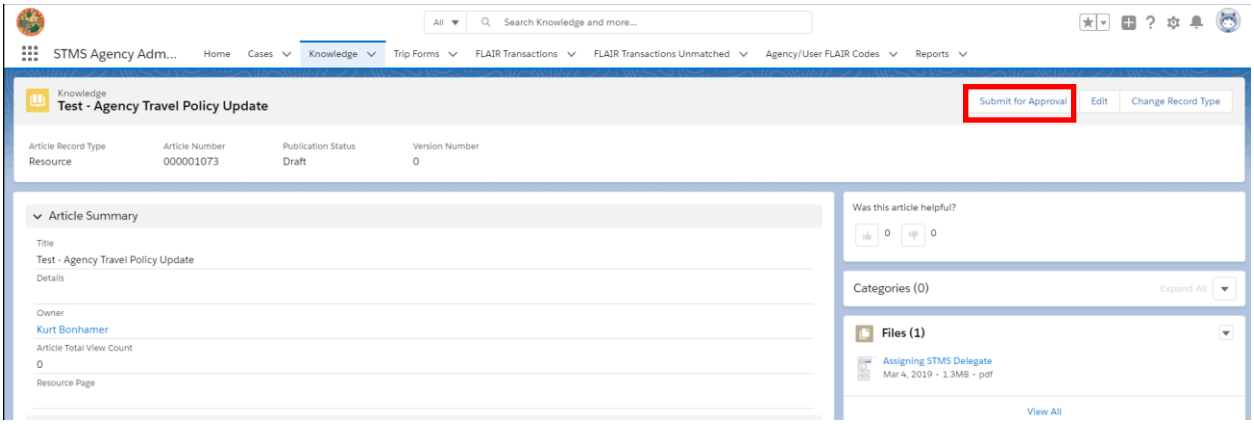


Figure 43 – Submit for Approval Button on Knowledge Article

Add Comments if desired in the Submit for Approval popup and then click the “Submit” button, as displayed in *Figure 44*.

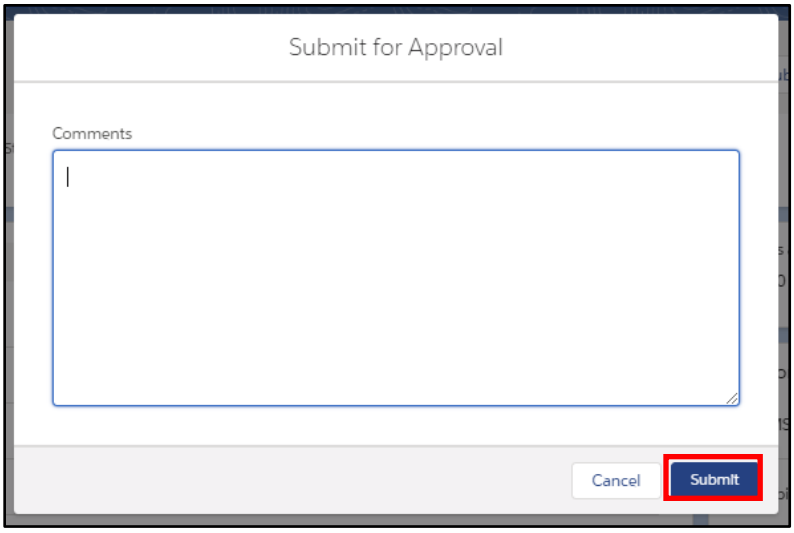


Figure 44 – Submit for Approval Popup

The STMS Team reviews the Knowledge Article and take appropriate action.

Continuity Support

AAs are familiar with STMS to help ensure any proposed agency changes to travel processing are compatible with STMS capabilities. Contact the STMS Team if you have any questions.

Resources

Training materials are available for both users and User Administrators. and available on the STMS website at: https://www.dms.myflorida.com/STMS.

Contact Information

Communicate issues and requests to the STMS System Administrators (SA) by submitting a case within STMS or by email at STMS.Support@dms.fl.gov. To contact other AA’s, their email address is available on the DMS Web site: https://www.dms.myflorida.com/agency_administration/statewide_travel_management_system/contact_your_agency_stms_support_team

User Account Changes

The User Management Client (UMC) utilizes data from People First, Active Directory and directly entered by User Administrators. Fields may be pulled and updated from various sources. For changes in Active Directory (AD) contact your IT Active Directory Administrator. For changes to People First, contact your People First Administrator. For changes in the UMC, contact an STMS User Administrator. The table below identifies where the information should be updated for specific fields:

Field Name	Active Directory Employee	Active Directory Non-Employee	Non-Active Directory Employee	Non-Active Directory Non-Employee
First Name	AD	AD	UMC	UMC
Last Name	AD	AD	UMC	UMC
Email Address*	AD	AD	UMC	Communicate changes with STMS Team through a Case
People First ID	People First and UMC	–	People First and UMC	–
FLAIR Org Code	People First	UMC	People First	UMC
Profile	UMC	UMC	–	–
Role	UMC, after checking Role Override	UMC, after checking Role Override	–	–
Last 4 SSN	–	UMC	–	UMC
Vendor Sequence #	–	UMC	–	UMC
Supervisor	UMC	UMC	UMC	UMC
Working Title	People First	UMC	People First	UMC
Headquarter City	UMC	UMC	UMC	UMC
Headquarter State	UMC	UMC	UMC	UMC
Headquarter is home?	UMC	UMC	UMC	UMC
Leadership flag	UMC	UMC	UMC	UMC
Sworn	People First	UMC	People First	UMC
Protected	People First	UMC	People First	UMC
Restricted	People First	UMC	People First	UMC
Restricted Relative	People First	UMC	People First	UMC

* Anytime a change is made to an email address, an email will be sent to the old and new email address, notifying the user of the change. The email sent to the new email address will contain a link that the user must click within 72 hours of the email being sent, for the new email address to be saved, and not revert to the previous email address.

Common Cases in STMS

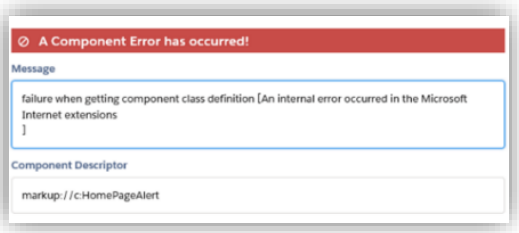
Below are some common cases that are encountered by users in STMS. The cases are grouped based on similarity.

If the AA is able to resolve the case, they enter the resolution description and close the case.

Trip Forms

	Case Description	Action - Resolution
1	Basic functionality does not work after log in. This may be seen in the form of missing fields, inability to view approval history, inability to approve/reject a trip, or "Unexpected Error" box appears.	Check what browser is being used. Users may have clicked on a link from an email, causing STMS to open in a different browser than Chrome If there is still missing functionality using Chrome, escalate the case to the STMS System Administrator.
2	Mission Critical Statements do not display for a Preparer	The Traveler's Name and Traveler's Agency Link fields must both be filled in for the available Mission Critical Statements to display.
3	Mission Critical Statements do not display	If the user is using Internet Explorer, the Mission Critical Statements will not display.

Error Messages

	Case Description	Action - Resolution
1	User has a Component Error message 	Check what browser is being used. Users may have clicked on a link from an email, causing STMS to open in a different browser than Chrome.
2	Invalid Supervisor or Delegate Error Message received.	• The approver and that approver's delegate must be active for a trip form to be sent to an approver. Ensure the approver is active • Reach out to the approver the user is attempting to send the trip form and ask the user to update their delegate. When an approver's delegate is inactive, trip forms cannot be submitted to the user.

Expense Line Items

	Case Description	Action – Resolution

1	How can a user remove an Expense Line Item (ELI) from a trip form?	When a trip form has a status of “Trip Draft” or “Submit for Approval”, the traveler/preparer can open the ELI and click on the “Delete” button to permanently delete the ELI. This action cannot be undone.
2	How to enter ELIs based on Most Economical Mode of Transportation Form?	Advise that amounts that the State will reimburse, based on the results of Most Economical Mode of Transportation, should be entered. More information is available in the STMS User Manual.

Org Code

	Case Description	Action – Resolution
1	How can a user’s default Organization Code be updated?	Update via People First for employees; Non-employees are updated through the UMC.
2	Organization Code or Expansion Option does not appear on the drop-down list within an ELI	Contact your agency's Finance and Accounting to ensure the code is valid. New Organization Codes and Expansion Options are available in STMS the day after they are added to the FLAIR files that STMS receives from DFS.
3	Invalid Organization Code Error	Contact your agency's Finance and Accounting to ensure the code is valid. New Organization Codes and Expansion options are available in STMS the day after they are added to the FLAIR files that STMS receives from DFS.

Approvals

	Case Description	Action – Resolution
1	Approver cannot see trip form that should be in their approval queue.	Type the trip form number in the search bar to determine if it appears in the search feature. If a user’s delegate is updated after a trip form is submitted, the trip form may take up to 10 minutes for the trip form to be visible by the new Delegate Approver. Check the UMC to ensure their role and profile are both set to "Approver".

Chatter

	Case Description	Action - Resolution
1	Cannot Chatter another User	Some limited examples exist where a certain set of individuals cannot be reached by Chatter. However, if the AA believes the example listed in the Case to be an error, escalate the Case to the STMS System Administrator.

User Accounts

	Case Description	Action - Resolution
1	Changes made to the UMC do not appear in the UMC or STMS	• Changes made in the UMC may not be immediately available if a record is opened again. The change may take up to 30 minutes to appear. Changes made in the UMC can take up to 1 hour to appear in STMS. AAs can check a user's account in STMS to see if edits are pending or have been attempted to be made. • If your agency utilizes CyberArk – contact CyberArk support (DST or agency provided) to verify that CyberArk is syncing with Active Directory – include the username, and details of the change. • If a user was removed from your agency's travel group in Active Directory and later added back into the Active Directory group, CyberArk will not handle synchronization correctly. Open a Case with the STMS Team, include the user's name on the account
2	The People First ID Number for a new employee is not recognized	Information for new employees is sent from People First to FLAIR and from FLAIR to STMS. So, there may be a 2- day delay once information is entered in People First for it to be available for use in the UMC and STMS.
3	A former AD employee is returning to the agency how do we ensure they only have 1 STMS account	1. When their new AD account is created, ask IT for the user's new AD Object ID. Ask IT to not add the user's new account into your agency's STMS AD Group, yet. 2. Provide the User's Name, PFID, and new Object ID in a Case, and request that the returning user's account is updated to reflect the new Object ID. Escalate it to the STMS Team 3. The STMS Team will confirm when the user's record has been updated with the new Object ID (displayed in STMS as the Federation ID in the User Record). 4. Agency IT can then add the user's new AD account into the STMS Group
4	How can AD accounts be converted to non-AD accounts?	1. Ensure the user's account is no longer active in AD 2. Create a Case requesting the user is converted to a non-AD Proxy Traveler, and escalate it to the STMS Team 3. If the user has any outstanding trip forms, that were prepared by that user, include the name of the person who should now be listed as Preparer for those forms.

Email Notifications

	Case Description	Action - Resolution
1	Not receiving emails from STMS	Check user's junk or clutter folder. Check agency IT settings.

USER MANAGEMENT

Monitoring License Usage

The State of Florida has licenses for up to 115,000 users of STMS within the Executive and Judicial branches. The number of active users will be monitored and managed by each agency.

AAs are responsible for monitoring the license usage within their agency. The STMS Users report is available in STMS to identify the users who have been inactive. If an account has not been used for 6 months or more, consider deactivating the account via the UMC to release unused licenses.

- AD-based accounts that are no longer needed should be removed from the AD group.
    - Remember to reassign the subordinates of any Approvers via the UMC, prior to removing them from the group.
    - If an AD-based account is removed/disabled, in Active Directory, but stays active in STMS, please open a case.
- If Non-AD-based accounts are no longer needed in STMS, open a case and escalate it to the System Administrator.
- If an AD account was deactivated by AD but needs to be converted to non-AD-based proxy traveler, open a case and escalate it to the System Administrator.
- Proxy travelers do not login to STMS. As a result, their last login date should not be used as the only measure of their activity in STMS.

User Administrators

While there is only one AA per agency, agencies may designate additional personnel to serve as User Administrators. User Administrators assist with the management of STMS user accounts via the User Management Client (UMC). UMC installation on agency PCs is managed by each agency. An STMS account is not required to use the UMC.