



# **USER MANAGEMENT CLIENT USER GUIDE**

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## Getting Started

The User Management Client (UMC) is a software tool used to manage Statewide Travel Management System (STMS) user accounts. The UMC interfaces with mediating technology to create and manage STMS account records. For example, your agency's Active Directory (AD) is a mediating technology between the UMC and STMS for users having Active Directory accounts. For those users, when updates are made to STMS account records displayed in the UMC, key information is subsequently stored in AD and then uploaded to STMS. A similar process takes place outside of AD for users who do not have AD accounts.

This guide reviews use of the UMC to manage the four types of user accounts in STMS, which are represented in the four quadrants of the graphic below. (Figure 1) It also addresses searching for and reporting on user records.

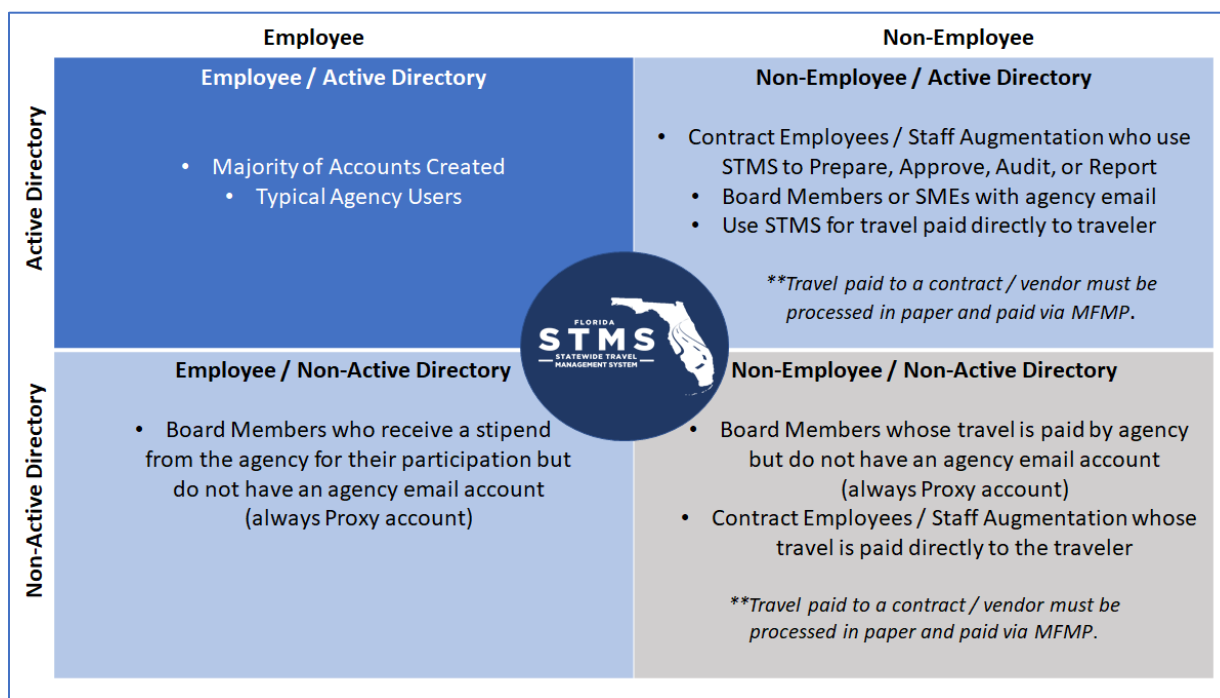


Figure 1 – Account Types with Examples

In this document, users of the UMC will be referred to as User Administrators. User Administrators are assigned by the Agency STMS Administrator, and will not access STMS directly. Each agency can have multiple User Administrators, who are responsible for creating and managing STMS user account within the UMC.

The UMC requires software that may not be currently installed on your computer. A representative from your agency's IT group will need to install the UMC and the required software (.Net5, 7zip, and Active Directory Module for PowerShell). Once the UMC is installed, the *STMS – User Management Client* shortcut icon will display on your desktop. (Figure 2)



Figure 2 – UMC Desktop Shortcut

**NOTE:** If your agency has multiple active directories or multiple districts within STMS, a separate instance of the UMC for each active directory and/or district will need to be installed on your computer.

Every time the UMC is opened, the latest updates to the source code and data will be downloaded. The screen below may display briefly while the UMC is checking for updates. No action is needed when this screen appears. (Figure 3)

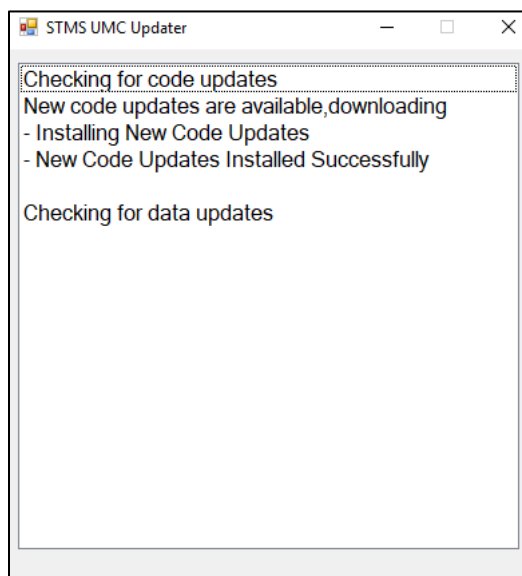


Figure 3 - UMC Checking for Updates

Once the update check is complete, the screen shown in Figure 3 will close and the “Main Menu” screen opens. (Figure 4)

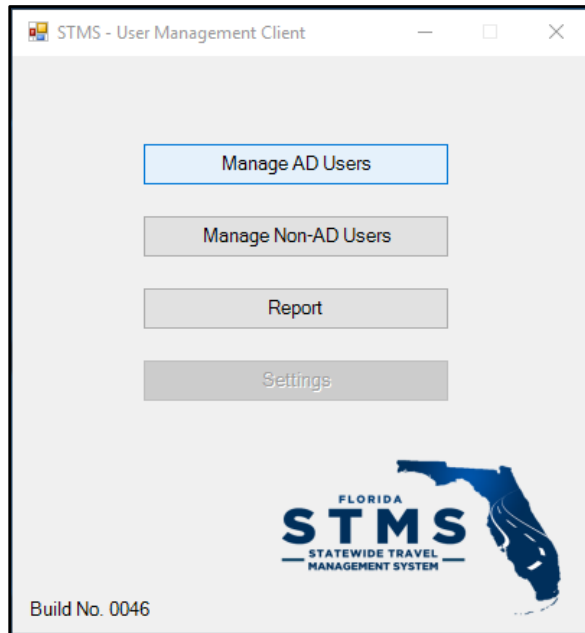


Figure 4 – UMC Main Menu Screen

The “Main Menu” screen contains the following buttons:

- Manage AD Users – Click this button to perform user management activity for users with Active Directory (AD) accounts.
- Manage Non-AD Users – Click this button to perform user management activity for users without AD accounts.
- Report – Click this button to view the STMS Users Report, with the option to export to Excel.
- Settings – Click this button to view the information needed for UMC to communicate with your agency’s AD, and STMS. (This button is available to Agency IT staff only.)

The “Build No.” displays the version of the UMC that is installed on your computer.

## Manage Active Directory (AD) Users

On the Main Menu Screen, clicking the “Manage AD Users” button will open the Manage AD Users Search Screen. (Figure 5)

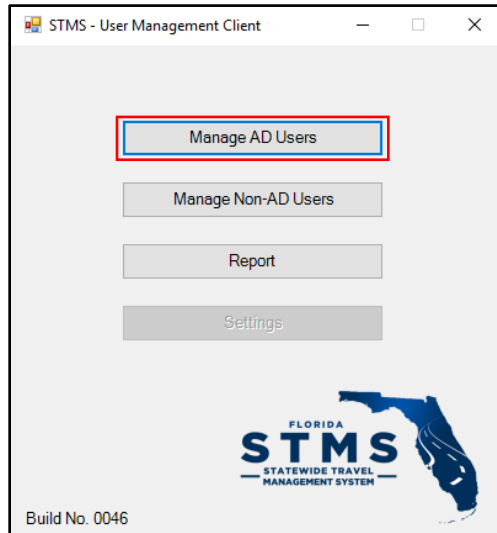


Figure 5 – Main Menu Screen

There are two methods for searching for a user with an Active Directory STMS account.

One option is to enter a username, first name or last name in the Search field and click on the “Search” button to run a search based on the information entered (Figure 6). On the Search screen (Figure 6), clicking the “Show All Users” button will show all users that are a member of your agency’s STMS Travelers AD Group.

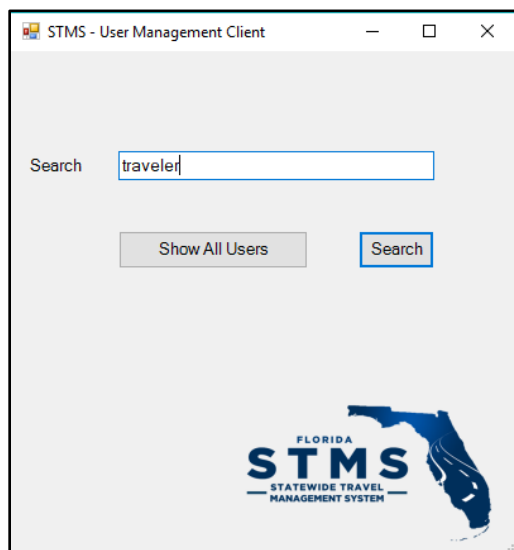


Figure 6 – Manage AD Users Search Screen

The search results display (Figure 7). If more than one matching user is found, then a list of users matching the search criteria display. You can select the correct user from the list.

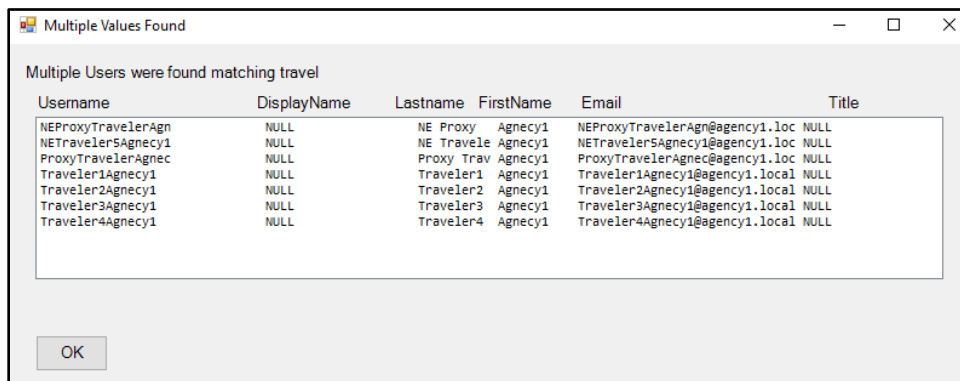


Figure 7 – Manage AD Users Search Results Screen

From the list of users, click on a specific user and click on the “OK” button to view the user’s settings. If the user is not listed, click on the “X” in the upper right of the screen to close the window (Figure 8).

Alternatively, you can search for a user by clicking on the “Search All Users” button and all of AD users will be displayed. From the list of users, click on a specific user and click on the “OK” button to view the user’s settings. If the user is not listed, click on the “X” in the upper right of the screen to close the window (Figure 8 – Manage AD Users: Show All Users Result Figure 8).

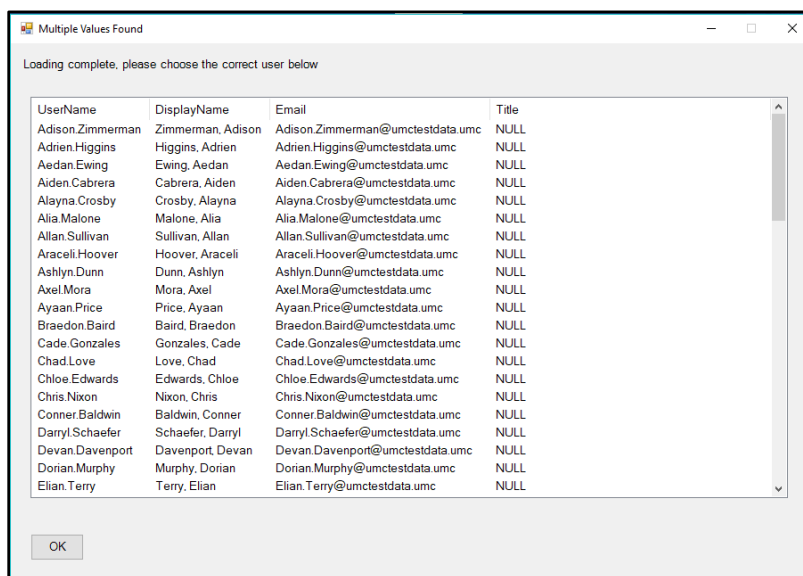


Figure 8 – Manage AD Users: Show All Users Result

Only users who are a member of your agency’s STMS Travelers AD Group will be displayed in AD-related lists in this tool. A search for a specific username that is in AD, but is not in the STMS Travelers AD Group, will return the following error message. This message indicates that the user must be added to the STMS Travelers AD group by your agency’s IT (Figure 9).

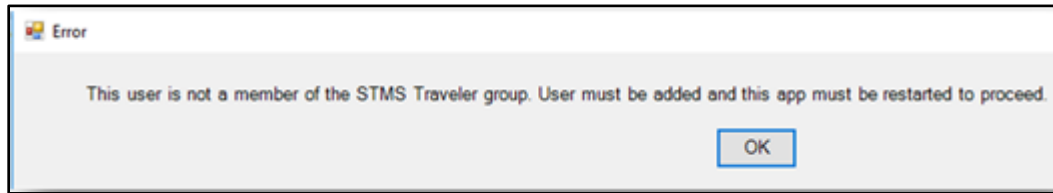


Figure 9 – User Not Found in STMS Traveler Group Message

If the user is a member of the STMS Travelers AD Group, but has not yet been configured, the screen below with all fields grayed out and the STMS Account Status of “Disabled” will display in red. Checking the STMS Account Status checkbox will change to “Enabled” in green and allow for user configuration (Figure 10).

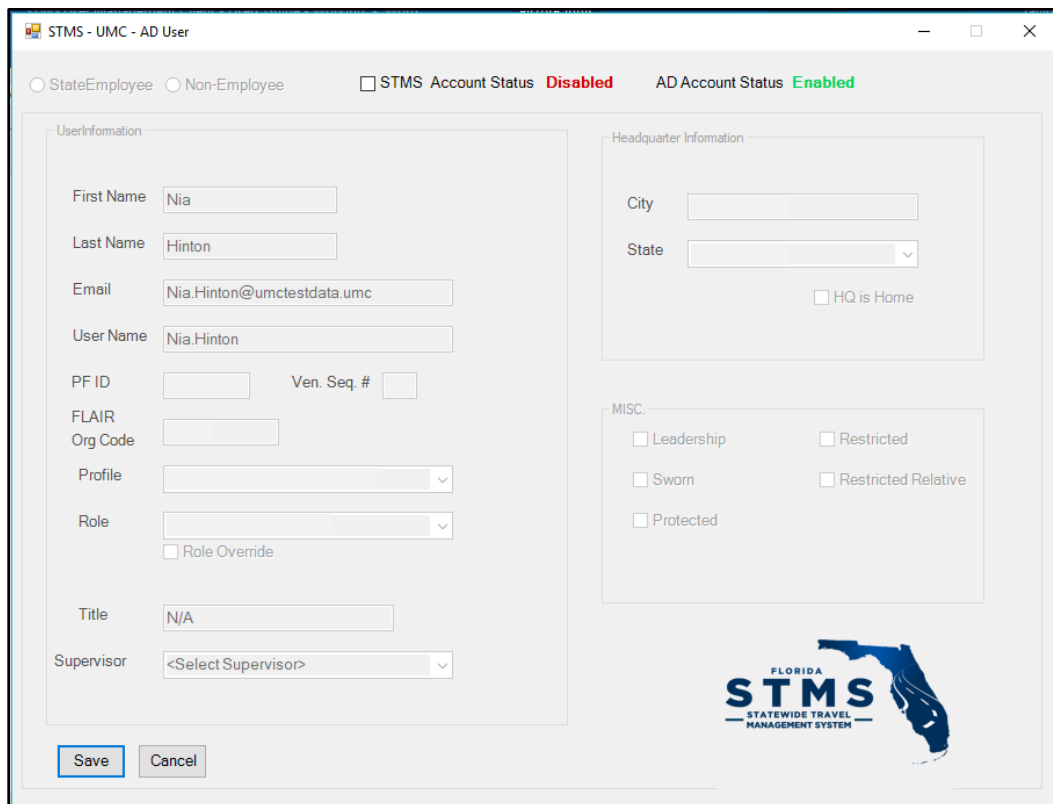
A screenshot of the "STMS - UMC - AD User" configuration window. The window has a title bar with standard Windows controls. Below the title bar, there are radio buttons for "StateEmployee" and "Non-Employee", and checkboxes for "STMS Account Status" (labeled "Disabled" in red) and "AD Account Status" (labeled "Enabled" in green). The main area is divided into two panes: "User Information" on the left and "Headquarter Information" on the right. The "User Information" pane contains fields for First Name (Nia), Last Name (Hinton), Email (Nia.Hinton@umctestdata.umd), User Name (Nia.Hinton), PF ID, Ven. Seq. #, FLAIR Org Code, Profile (dropdown), Role (dropdown), Title (N/A), and Supervisor (dropdown). The "Headquarter Information" pane contains fields for City, State (dropdown), and a checkbox for "HQ is Home". Below these panes is a "MISC." section with checkboxes for Leadership, Restricted, Sworn, Restricted Relative, and Protected. At the bottom left are "Save" and "Cancel" buttons. At the bottom right is the Florida STMS logo.

Figure 10 – STMS Traveler AD Group Member Record – Prior to Being Enabled



## Manage Active Directory Users: State Employee Configuration

When configuring a new State Employee AD User record, the STMS Account Status checkbox must be checked and “Enabled” to allow input into the fields on the screen.

The following fields are displayed on the AD Users: State Employee Configuration screen. (Figure 11)  
The fields are further described below.

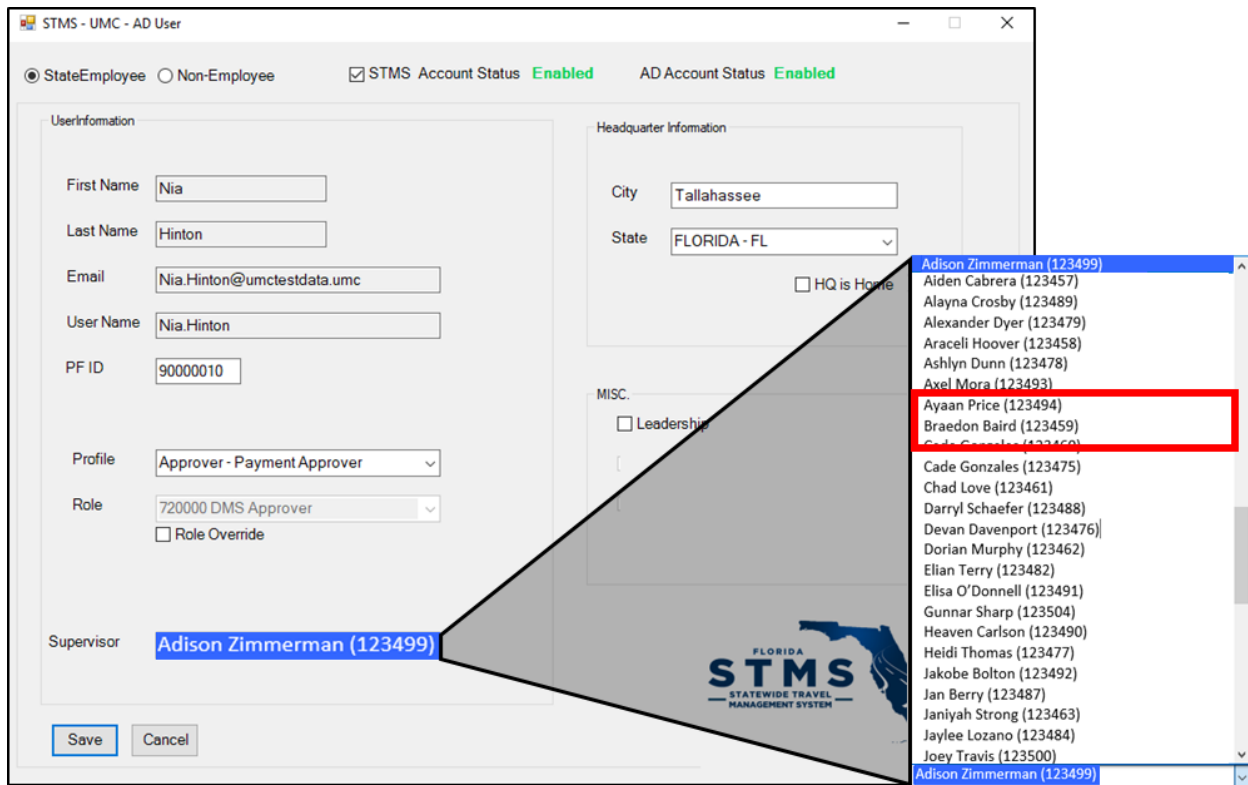


Figure 11 – AD Users: State Employee Configuration Screen

AD Account Status displays the status of the user’s active directory account.

1. First Name*	This field is populated based on information pulled from Active Directory.
2. Last Name*	This field is populated based on information pulled from Active Directory.
3. Email*	This field is populated based on information pulled from Active Directory.
4. User Name*	This field is populated based on information pulled from Active Directory.
5. PF ID	This field is for the People First Login ID is numeric and must be either 6 or 7 digits in length. (Do not use the People First “Employee ID” Number.) Upon saving you will be asked to confirm that the correct People First Login ID has been entered, to ensure the correct person will be paid for trips associated with this account. See People First Validation Rule.
6. Profile	This dropdown menu displays all Profiles available within the UMC.
7. Supervisor	This dropdown menu displays all the Approvers available in the user’s hierarchy. Select the Approver who will be the first reviewer for the user’s trip forms. In addition to the available Approvers’ names, a series of numbers will appear in parentheses. For employees, this number will be

	their People First ID and for non-employees, the number will be the last 4 digits of their Social Security Number followed by their three-digit sequence number. These numbers are included to help select the correct supervisor should multiple people have the same name.
8. City	This text field is the city where the user works. You must enter from 3 to 20 characters in this field.
9. State	This dropdown list displays the states available. The state where the user works must be selected. "FLORIDA – FL" is the default value.
10. HQ is Home	This checkbox should be selected if the user works at their home office.
11. Leadership	This checkbox is selected if the user is leadership and should be included in the Quarterly Leadership Report.

\* Not Editable

Clicking the "Cancel" button will discard any changes made before saving.  
Clicking the "Save" button will save any changes made to the record.

### People First Validation

Every time an employee's account is saved, a verification is performed to determine if the People First Login Number that was entered matches a People First Login Number on file. The below message will appear, if the name associated with the People First Login number that you entered matches a name on file. (Figure 12)

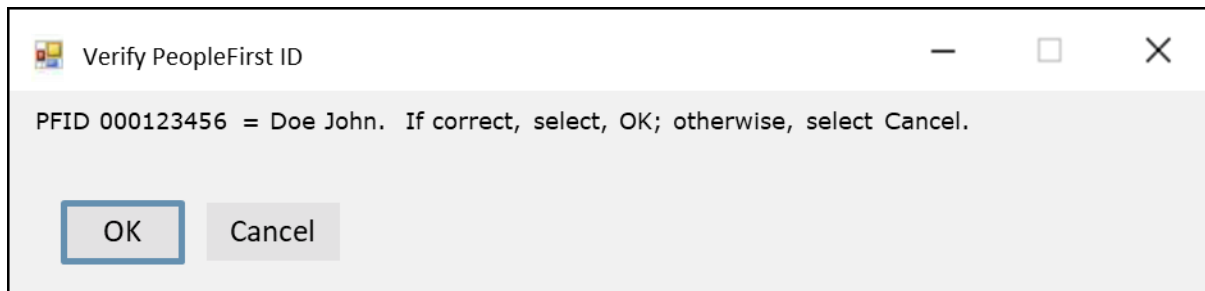


Figure 12 - People First Verification

If the name displayed, is the same person as the user's record you are updating, select "OK"; otherwise select "Cancel", to enter a different number.

If a People First Login Number that matches the number that was entered is not found, the below message will appear, asking you to enter a different People First Login ID. (Figure 13)

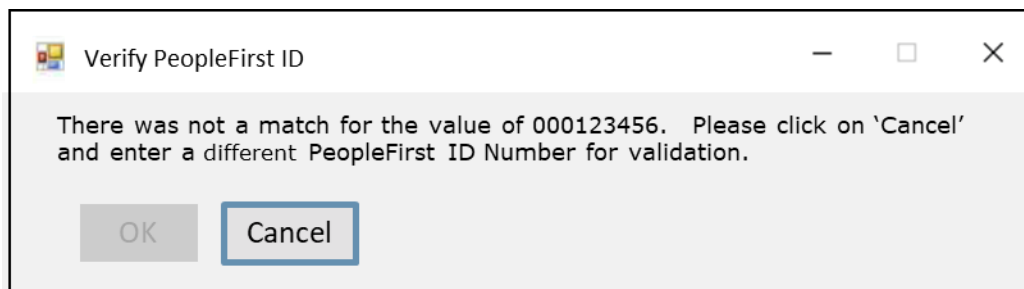


Figure 13 - No Matching People First Value

## Subordinate Transfer

If an Approver's profile is being changed to a non-approver profile, then the account's subordinates (those travelers that listed the Approver as their Supervisor) will need to be reassigned. The Subordinates Transfer screen will display when the record is saved, listing the subordinates and allowing all the subordinates to be reassigned to a new supervisor. (Figure 14)

**NOTE:** If a supervisor's account is disabled in Active Directory prior to a transfer of subordinates, it will not be possible to change the account in the UMC to a non-approver profile using the subordinate transfer tool. Each subordinate's individual account will need to be updated to reflect their new supervisor.

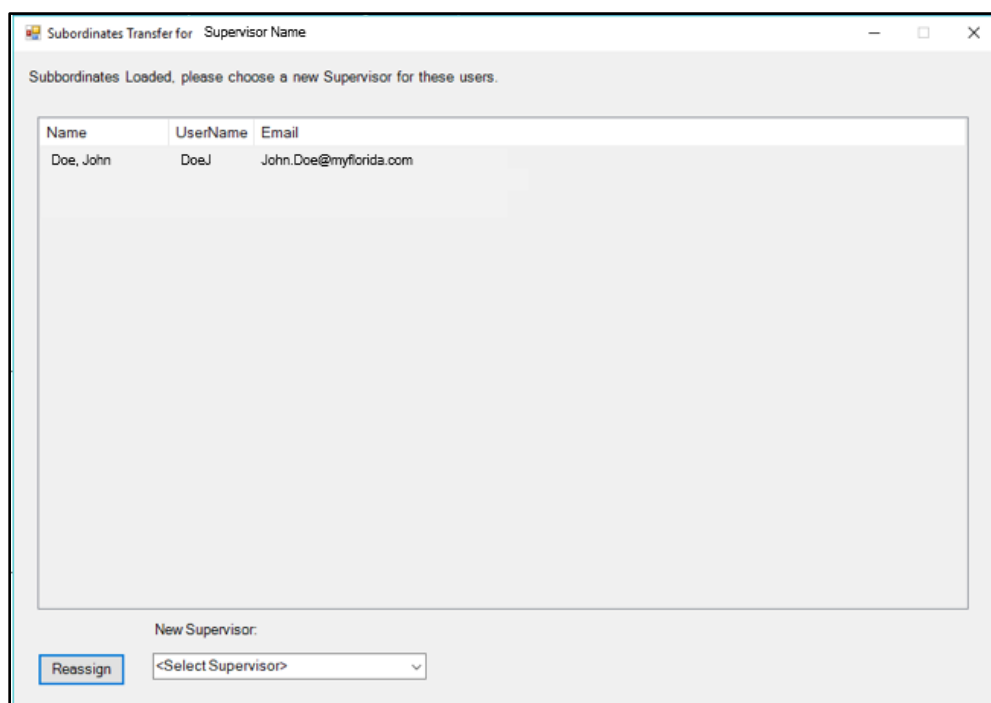


Figure 14 – Subordinates Transfer Screen

To reassign the user's subordinates, select the new supervisor for the subordinates and then click the Reassign button. This will reassign the subordinates' supervisor to the supervisor selected.

## Manage Active Directory Users: Non-Employee Configuration

When configuring a new Non-Employee AD User record, the STMS Account Status checkbox must be checked and will display as “Enabled” to allow input into the fields on the screen. AD Account Status displays the status of the user’s active directory account.

The AD Users: Non-Employee Configuration screen includes the SSN (Last 4) field and Vendor Sequence # (Ven. Seq. #) instead of displaying the People First ID field (PF ID). The following fields are displayed on the AD Users: Non-Employee Configuration screen. (Figure 15Error! Reference source not found.)

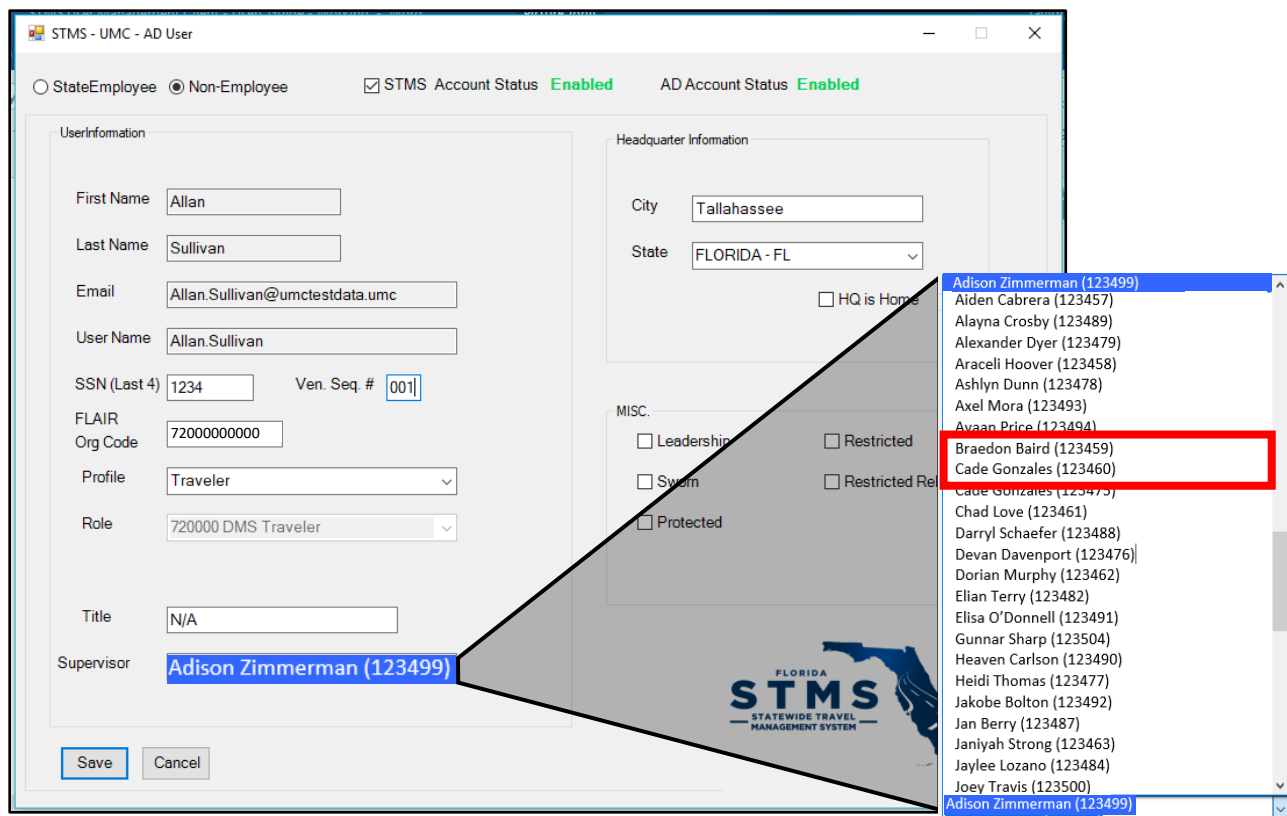


Figure 15 - AD Users: Non-Employee Configuration Screen

1. First Name*	This field is populated based on information pulled from Active Directory.
2. Last Name*	This field is populated based on information pulled from Active Directory.
3. Email*	This field is populated based on information pulled from Active Directory.
4. User Name*	This field is populated based on information pulled from Active Directory.
5. SSN (Last 4)	Last 4 digits of the Non-Employee’s social security number or the last 4 of their organization’s tax ID. Allows for entry of 4 numeric (0-9) characters.
6. Ven Seq #	This field identifies the vendor record based on the Vendor Sequence Number. Allows for entry of 3 numeric (0-9) characters. The Last 4 of SSN and Vendor Sequence Number rare used to display available vendor records when you click Save.
7. FLAIR Org Code	This is the default organization code the traveler will use for expenses. This value entered into this field must be exactly 11 digits.
8. Profile	This dropdown menu displays all Profiles available within the UMC.

9. Role*	This dropdown menu defaults to the role most commonly used for the selected Profile. *
10. Title	This field is editable and defaults to Non-Employee. The value entered here must be between 3 and 20 characters and cannot contain a ":"
11. Supervisor	This dropdown menu displays all the Approvers available in the user's hierarchy. Select the Approver who will be the first reviewer for the user's trip forms. In addition to the available Approvers' names, a series of numbers will appear in parentheses. For employees, this number will be their People First ID and for non-employees, the number will be the last 4 digits of their Social Security Number followed by their three-digit sequence number. These numbers are included to help select the correct supervisor should multiple people have the same name.
12. City	This text field is the city where the user works. You must enter between 3 and 20 characters in this field.
13. State	This dropdown list displays the states available. The state where the user works must be selected. "FLORIDA – FL" is the default value.
14. HQ is Home	This checkbox should be selected if the headquarter address is the users home office.
15. Leadership	This checkbox is selected if the user is leadership and should be included in the Quarterly Leadership Report.
16. Sworn, Protected, Restricted, Restricted Relative	These checkbox options must be set manually for non-employees because the information is not available for them in People First.

\* *Not editable*

Clicking the "Cancel" button will discard any changes made before saving.

Clicking the "Save" button will save any changes made to the record and open the Vendor Match screen. (Figure 16)

New Non-AD based account may take up to one hour to have their accounts created and then appear in the list of accounts displayed in the UMC. If you have created a Non-AD based account and you do not see it in the UMC after one hour, please contact the System Administrators, do not create another account for that user.

## Vendor Match Screen

Every time a non-employee's account is saved, a verification is performed to determine if the non-employee is linked to the correct information the Statewide Vendor File. The Vendor Match screen shows any potential vendor file matches based on the last four digits of the Social Security Number or Tax ID number and Vendor Sequence Number. (Figure 16) Clicking on a row and then clicking OK will associate an STMS account with a listing from the Statewide Vendor file. Linking an STMS account to the wrong Statewide Vendor information will result in the wrong person being paid. The Skip Contact Link checkbox can be selected to create user without linking them to a listing from the Statewide Vendor in STMS; however, users without a contact link cannot be paid.

Multiple Values Found

Please choose the correct individual below.

ID	Name	VinSeq#	SSN	State	City
003t000000GbmVAA	TESTIMONY EXPERTS LLC	001	2060	FL	TAMPA
003t000000GBCaAA	BIG BOX STORE	001	2060	FL	MIAMI
003t000000GB77LAA	FAST FOOD RESTAURANT	001	2060	NC	CHARLOTTE
003t000000GAmVbAA	CORNER PHARMACY	001	2060	FL	DAYTONA BEACH
003t000000GAmKyAA	JACKSONVILLE ANIMAL CLINIC	001	2060	FL	JACKSONVILLE
003t000000GAUStAA	SPRING HILL HEALTH SERVICES INC	001	2060	FL	GAINESVILLE
003t000000GAqbIAA	TOUCHPOINT LLC	001	2060	FL	OCALA
003t000000GAYSeAA	TAYLOR INC	001	2060	PA	POTTSTOWN
003t000000GAu4kAA	HANS TOWING	001	2060	FL	SPRING HILL
003t000000GBecWAA	FANA MEDICAL	001	2060	FL	OLDSMAR
003t000000GBi11AA	SABEL MARINA	001	2060	FL	RIVIERA BCH
003t000000GBXPhAA	DRIFTWOOD DENTAL	001	2060	FL	TAMPA
003t000000HG9WAA	MCGEE SOLUTIONS	001	2060	FL	DAYTONA BEACH
003t000000GBHJYAA	LOGUE ENTERPRISES	001	2060	AL	DOTHAN
003t000000GBhnIAA	BOB ROSS PAINTERS LLC	001	2060	FL	ST PETERSBURG
003t000000GBR2oAA	C-QUARTERS BANK	001	2060	FL	LOXAHATCHEE
003t000000GBLCZAA	VAUGHN TECH	001	2060	FL	TALLAHASSEE
003t000000GBdtBAA	K. CHESNEY ASSOC	001	2060	FL	PINELLAS PARK
003t000000GBhL4AA	BLUE SEAL PAINTERS	001	2060	FL	NEW PORT RICHEY
003t000000GBnq8AA	CREATIVE DAY CARE	001	2060	FL	TALLAHASSEE
003t000000GB0UAA	MASONS BRICK WORKS	001	2060	FL	PANAMA CITY

☐ Skip Contact Link

**Trip forms for Travelers without a valid contact link cannot be submitted for reimbursement.**

OK

Figure 16 – Vendor Match Screen

## Subordinate Transfer

If an Approver's profile is being changed to a non-approver profile, then the account's subordinates (those travelers that listed the Approver as their Supervisor) will need to be reassigned. The Subordinates Transfer screen will display when the record is saved, listing the subordinates and allowing all the subordinates to be reassigned to a new supervisor. (Figure 17 – Subordinates Transfer Screen)

**NOTE:** If a supervisor's account is disabled in Active Directory prior to a transfer of subordinates, it will not be possible to change the account in the UMC to a non-approver profile to use the subordinate transfer tool.

Name	UserName	Email
Doe, John	Doe.J	John.Doe@myflorida.com

New Supervisor: <Select Supervisor>

Reassign

Figure 17 – Subordinates Transfer Screen

To reassign the user's subordinates, select the new supervisor for the subordinates and then click the Reassign button. This will reassign the subordinates' supervisor to the supervisor selected.

## Disabling Active Directory Users

To freeze an AD user's STMS account, uncheck the STMS Account Status checkbox on the user's record in the UMC. This change will be synchronized to the STMS within approximately one hour. Once the synchronization occurs, the user will not be able to log into STMS. However, if they are an Approver, trip forms can still be sent to them for approval.

Alternatively, to disable the STMS access immediately for those with an AD account, your agency's IT can disable the AD account. However, if you do not also disable the account through the UMC, the account will regain active status if the AD account is reactivated.

## Manage Non-Active Directory Users

Non-AD users are those who are not in your agency's active directory. These users may include certain commission or board members, contractors, and non-state employees.

Managing Non-AD users is similar to managing AD users in the UMC with some minor differences:

- First Name, Last Name and Email Address must be entered by the User Administrator
- Non-AD users can only have the Proxy Traveler Profile
- Non-AD users can only have a Traveler Role
  - Non-AD user cannot be an Approver, Preparer or Fiscal Accountant.
- Non-AD users will not be able to log into STMS.

On the Main Menu Screen, clicking the "Manage Non-AD Users" button will open the Manage Non-AD Users Search/Create Screen. (Figure 18**Error! Reference source not found.**)

On-the Manage Non-AD Users Search/Create screen, you can search for the user by typing in the users first or last name then click Search. Clicking the "Show All Users" button will show all Non-AD STMS users associated with your agency. Select a user and click OK to view the user record details.

Clicking the "Create Non-AD User" button will allow you to Create a Non-AD User.

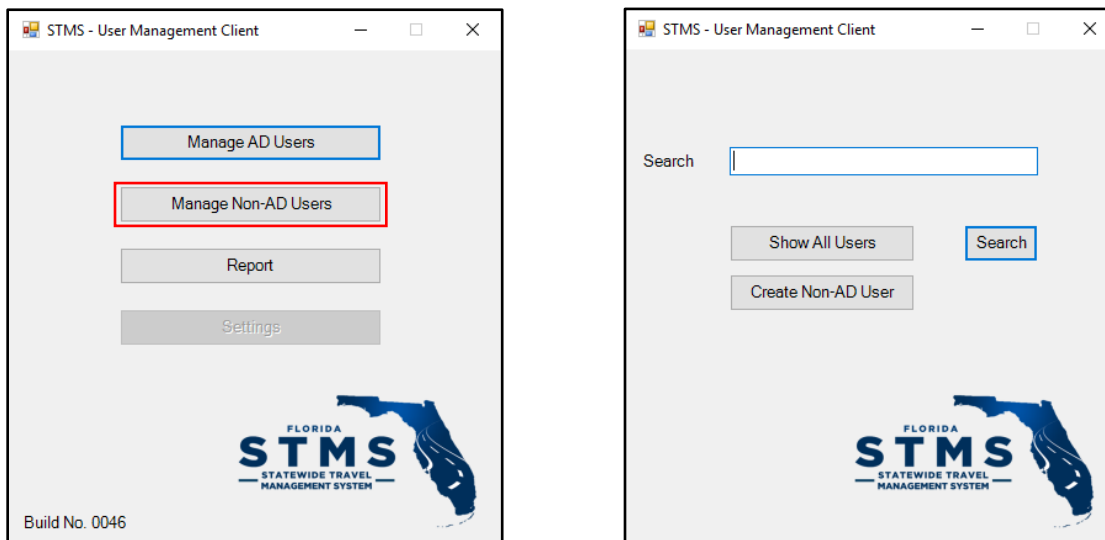


Figure 18 - Main Menu Screen and Manage Non-AD Users Search/Create Screen



## Manage Non-Active Directory Users: State Employee Configuration

When creating a new user record for a state employee who is not in your agency's active directory, click the StateEmployee radio button. Check the STMS Account Status checkbox, which will display as "Enabled," to allow input into the fields on the screen.

The following fields are displayed on the Non-AD Users: State Employee Configuration screen.  
(Figure 19)

Figure 19 - Non-AD Users: State Employee Configuration Screen

The Non-AD Users: State Employee Configuration screen displays the Preparer and Traveler Email fields instead of displaying the username. The Profile option is grayed out and displays Proxy Traveler, the only available role for these accounts in STMS.

1. First Name	Sets the value in STMS.
2. Last Name	Sets the value in STMS.
3. Preparer Email	Preparer Email in the UMC is used to populate the email field of the user in STMS. Notifications related to the user's trip forms will be sent to this address.
4. Traveler Email	Set once when the account is created, after which it is not editable. Used for record identification and not for login because Proxy Travelers can't log in. Once saved, after a short delay it will be displayed in the UMC.

5. PF ID	This field is for the People First Login ID is numeric and must be either 6 or 7 digits in length. (Do not use the People First "Employee ID" Number.) Upon saving you will be asked to confirm that the correct People First Login ID has been entered, to ensure the correct person will be paid for trips associated with this account. See People First Validation Rule.
6. Profile	This field is set to Proxy Traveler and is not editable. Non-AD users must have the Proxy Traveler Profile in STMS.
7. Role	This field is not editable for Non-AD users. Non-AD users must have the Proxy Traveler Profile and associated Role in STMS. This Role assignment will be managed by STMS.
8. Role Override	No role override is possible for Non-AD users, since Non-AD users must have the Proxy Traveler Profile.
9. Supervisor	This dropdown menu displays all the Approvers available in the user's hierarchy. Select the Approver who will be the first reviewer for the user's trip forms. In addition to the available Approvers' names, a series of numbers will appear in parentheses. For employees, this number will be their People First ID and for non-employees, the number will be the last 4 digits of their Social Security Number followed by their three-digit sequence number. These numbers are included to help select the correct supervisor should multiple people have the same name.
10. City	This text field is the city where the user works. You must enter from 3 and 20 characters in this field.
11. State	This dropdown list displays the states available. The state where the user works must be selected. "FLORIDA – FL" is the default value.
12. HQ is Home	This checkbox should be selected if the headquarter address is the users home office.
13. Leadership	This checkbox is selected if the user is leadership and should be included in senior management reporting.

Clicking the "Cancel" button will discard any changes made before saving.  
Clicking the "Save" button will save any changes made to the record.

### People First Validation

Every time an employee's account is saved, a verification is performed to determine if the People First Login Number that was entered matches a People First Login Number on file. The below message will appear, if the name associated with the People First Login number that you entered matches a name on file. (Figure 20)

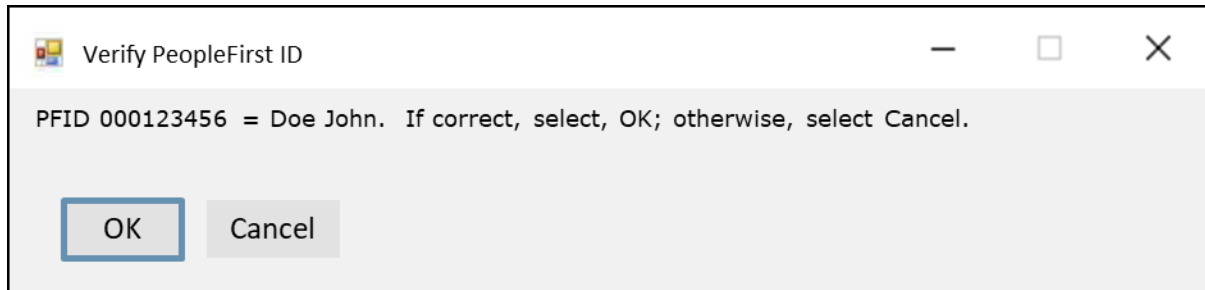


Figure 20 - People First Verification

If the name displayed, is the same person as the user's record you are updating, select "OK"; otherwise select "Cancel", to enter a different number.

If a People First Login Number that matches what was entered is not found, the below message will appear, asking you to enter a different People First Login ID. (Figure 21)

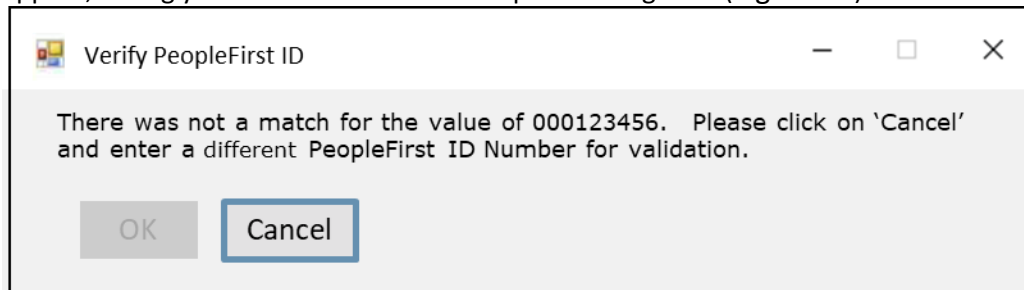


Figure 21 - No Matching People First Value



## Manage Non-Active Directory Users: Non-Employee Configuration

When creating a new user record for a non-state employee who is not in your agency’s active directory, click the Non-Employee radio button. Check the STMS Account Status checkbox, which will display as “Enabled,” to allow input into the fields on the screen.

The following fields are displayed on the Non-AD Users: Non-Employee Configuration screen. (Figure 22)

Figure 22 - Non-AD Users: Non-Employee Configuration Screen

The Non-AD Users: Non-Employee Configuration screen displays the Preparer and Traveler Email fields instead of displaying the username. The Profile option is grayed out and displays Proxy Traveler, the only available role for these accounts in STMS.

1. First Name	Sets the value in STMS.
2. Last Name	Sets the value in STMS.
3. Preparer Email	Preparer Email in the UMC is used to populate the email field of the user in STMS. Notifications related to the user’s trip forms will be sent to this address.
4. Traveler Email	Set once when the account is created, after which it is not editable. Used for record identification and not for login because Proxy Travelers can’t log in. Once saved, after a short delay the account will be displayed in the UMC.
5. SSN (Last 4)	Last 4 digits of the Non-Employee’s social security number or the last 4 of their organization’s tax ID. Allows for entry of 4 numeric (0-9) characters.

6. Ven Seq #	This field identifies the vendor record based on the Vendor Sequence Number. Allows for entry of 3 numeric (0-9) characters. The Last 4 of SSN and Ven Seq # are used to display available vendor records when you click Save.
7. FLAIR Org Code	This is the default organization code the traveler will use for expenses. This value entered into this field must be exactly 11 digits.
8. Profile	This field is set to Proxy Traveler and is not editable. Non-AD users must have the Proxy Traveler Profile in STMS.
9. Role	This field is not editable for Non-AD users. Non-AD users must have the Proxy Traveler Profile and associated Role in STMS. This Role assignment will be managed by STMS.
10. Role Override	No role override is possible for Non-AD users, since Non-AD users must have the Proxy Traveler Profile.
11. Title	This field is editable, and defaults to Non-Employee. The value entered here must be between 3 and 20 characters and cannot contain a ":"
12. Supervisor	This dropdown menu displays all the Approvers available in the user's hierarchy. Select the Approver who will be the first reviewer for the user's trip forms. In addition to the available Approvers' names, a series of numbers will appear in parentheses. For employees, this number will be their People First ID and for non-employees, the number will be the last 4 digits of their Social Security Number followed by their three-digit sequence number. These numbers are included to help select the correct supervisor should multiple people have the same name.
13. City	This text field is the city where the user works. You must enter between 3 and 20 characters in this field.
14. State	This dropdown list displays the states available. The state where the user works must be selected. "FLORIDA – FL" is the default value.
15. HQ is Home	This checkbox should be selected if the headquarter address is the users home office.
16. Leadership	This checkbox is selected if the user is leadership and should be included in senior management reporting.
17. Sworn, Protected, Restricted, Restricted Relative	These checkbox options must be set manually for non-employees because the information is not available for them in People First.

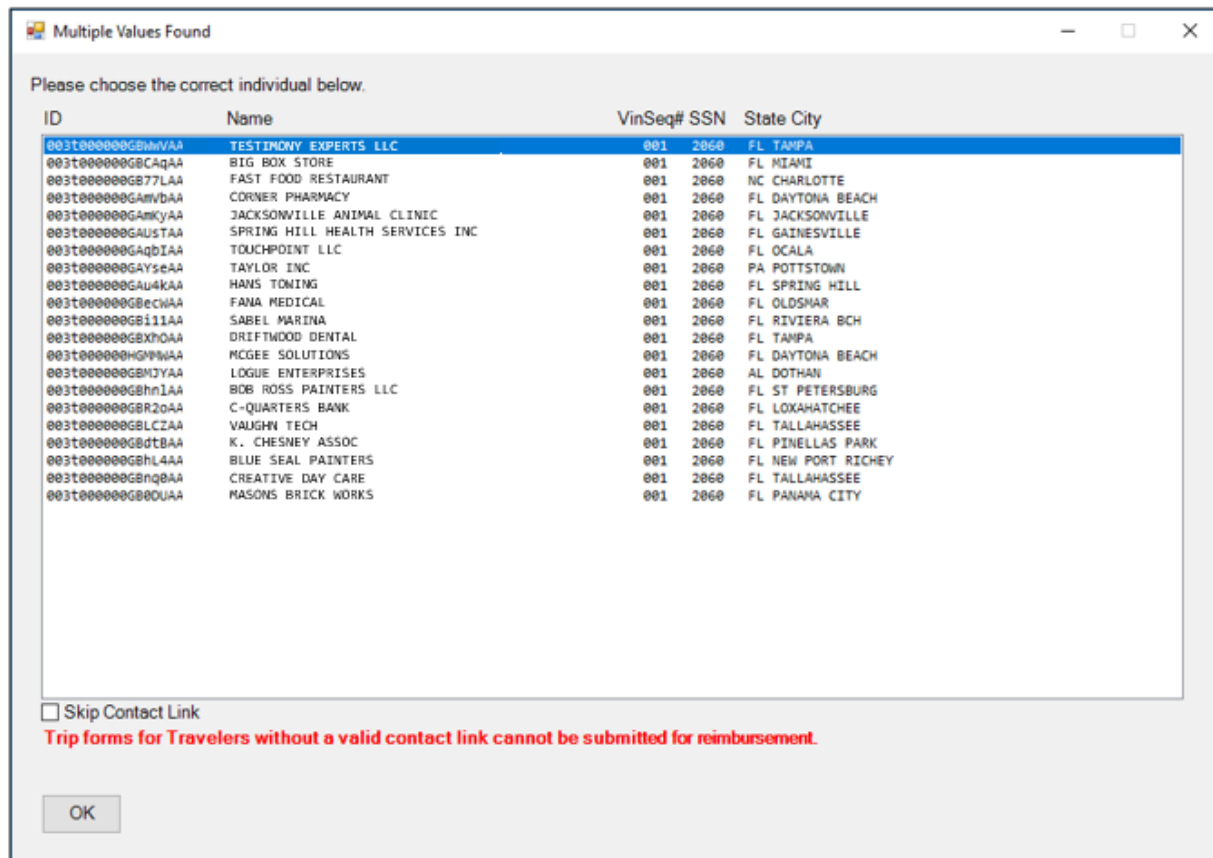
Clicking the "Cancel" button will discard any changes made before saving.

Clicking the "Save" button will save any changes made to the record and open the Vendor Match screen.  
(Figure 23Figure 16)

New Non-AD based account may take up to one hour to have their accounts created and then appear in the list of accounts displayed in the UMC. If you have created a Non-AD based account and you do not see it in the UMC after one hour, please contact the System Administrators, do not create another account for that user.

## Vendor Match Screen

Every time a non-employee's account is saved, a verification is performed to determine if the non-employee is linked to the correct information the Statewide Vendor File. The Vendor Match screen shows any potential vendor file matches based on the last four digits of the Social Security Number or Tax ID number and Vendor Sequence Number. Clicking on a row and then clicking OK will associate an STMS account with a listing from the Statewide Vendor file. Linking an STMS account to the wrong Statewide Vendor information will result in the wrong person being paid. The Skip Contact Link checkbox can be selected to create user without linking them to a listing from the Statewide Vendor in STMS; however, users without a contact link cannot be paid.



Multiple Values Found

Please choose the correct individual below.

ID	Name	VinSeq#	SSN	State	City
003t000000G8wVAA	TESTIMONY EXPERTS LLC	001	2060	FL	TAMPA
003t000000G8CqAA	BIG BOX STORE	001	2060	FL	MIAMI
003t000000G877LAA	FAST FOOD RESTAURANT	001	2060	NC	CHARLOTTE
003t000000G8AmVbAA	CORNER PHARMACY	001	2060	FL	DAYTONA BEACH
003t000000G8AmCyAA	JACKSONVILLE ANIMAL CLINIC	001	2060	FL	JACKSONVILLE
003t000000G8AustAA	SPRING HILL HEALTH SERVICES INC	001	2060	FL	GAINESVILLE
003t000000G8AqbIAA	TOUCHPOINT LLC	001	2060	FL	OCALA
003t000000G8AYseAA	TAYLOR INC	001	2060	PA	POTTSTOWN
003t000000G8Au4kAA	HANS TONING	001	2060	FL	SPRING HILL
003t000000G8BecWAA	FANA MEDICAL	001	2060	FL	OLDSMAR
003t000000G8B111AA	SABEL MARINA	001	2060	FL	RIVIERA BCH
003t000000G8XhQAA	DRIFTWOOD DENTAL	001	2060	FL	TAMPA
003t000000G8HPPWAA	MCGEE SOLUTIONS	001	2060	FL	DAYTONA BEACH
003t000000G8MjYAA	LOGUE ENTERPRISES	001	2060	AL	DOTHAN
003t000000G8BhnIAA	BOB ROSS PAINTERS LLC	001	2060	FL	ST PETERSBURG
003t000000G8R2oAA	C-QUARTERS BANK	001	2060	FL	LOXAHATCHEE
003t000000G8LcZAA	VAUGHN TECH	001	2060	FL	TALLAHASSEE
003t000000G8dtBAA	K. CHESNEY ASSOC	001	2060	FL	PINELLAS PARK
003t000000G8hL4AA	BLUE SEAL PAINTERS	001	2060	FL	NEW PORT RICHEY
003t000000G8nq8AA	CREATIVE DAY CARE	001	2060	FL	TALLAHASSEE
003t000000G8B0UAA	MASONS BRICK WORKS	001	2060	FL	PANAMA CITY

☐ Skip Contact Link

**Trip forms for Travelers without a valid contact link cannot be submitted for reimbursement.**

OK

Figure 23 -Vendor Match Screen

## Disabling Non-Active Directory Users

To disable a Non-AD user's STMS account, uncheck the STMS Account Status checkbox, which will display as "Disabled". Non-AD accounts that are no longer needed can be deactivated by the System Administrators. To request the deactivation of a Non-AD account, please open a Case in STMS.

## Report

On the Main Menu screen, click on the “Report” button (Figure 24) to run a report listing all users in the AD group associated with this instance of the UMC and all of the non-AD based accounts for the agency.

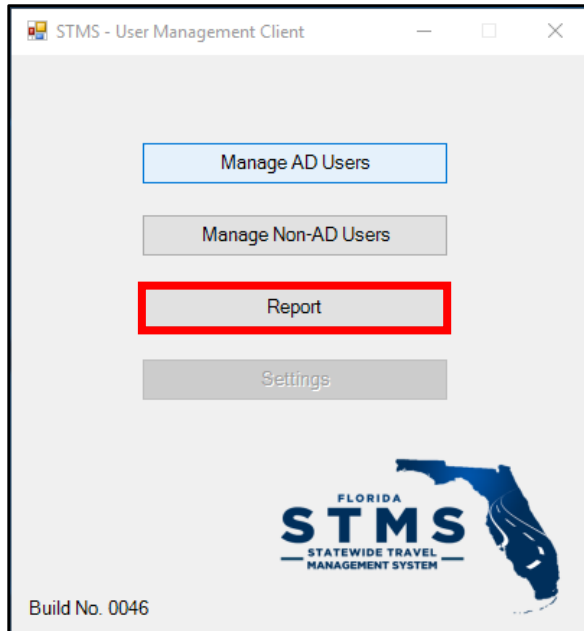


Figure 24 -UMC Main Menu Screen

The report will display all each user’s Username, Role, Profile, Supervisor, EmployeeType, and ID (PF or Last 4 SSN), if the account is enabled in STMS, if the account is enabled in Active Directory (Figure 25). Accounts that have missing ID’s and “NULL” values in multiple fields indicate that accounts that have not been configured in the UMC.

STMS Users Report

Loading complete. 22 users have been loaded.

ID	STMSEnabled	ADEnabled	User Name	Full Name	Role	Profil
1616	True	NA	terry.nehring@tampagov.net.stms	Nehring, Terry	720000 DMS Traveler	Prox
1867	True	NA	cdill011@outlook.com.stms	Dill-Collier, L. Carolyn	720000 DMS Traveler	Prox
1953	True	NA	tomer.nadler@sprint.com.stms	Nadler, Tom	720000 DMS Traveler	Prox
4393	True	NA	marycarolinemica@gmail.com.stms	Mica, Mary	720000 DMS Traveler	Prox
9701	True	NA	bybear@aol.com.stms	Bear, Belle	720000 DMS Traveler	Prox
4643	True	NA	bguthrie@gulfcountry-fl.gov.stms	Guthrie, Ben	720000 DMS Traveler	Prox
2814	True	NA	pylesi@hillsboroughcounty.org.stms	Pyles, Ira	720000 DMS Traveler	Prox
8028	True	NA	shmullican@yahoo.com.stms	Mullican, Susan	720000 DMS Traveler	Prox
2308	True	NA	christie.a.pontis@centurylink.com.stms	Pontis, Christie	720000 DMS Traveler	Prox
1154	True	NA	kkelly@kevinscatalog.com.stms	Kelly, Kathleen	720000 DMS Traveler	Prox
7267	True	NA	landerson@ccso.org.stms	Anderson, Laurene	720000 DMS Traveler	Prox
180623	True	NA	holger.ciupalo@laspbs.state.fl.us.stms	Ciupalo, Holger	720000 DMS Traveler	Prox
8973	True	NA	richard.steiner@ocfl.net.stms	Steiner, Richard	720000 DMS Traveler	Prox
8983	True	NA	gholcomb@lakecountyfl.gov.stms	Holcomb, Greg	720000 DMS Traveler	Prox
5699	True	NA	alphonso.gordon@marioncountyfl.gov.stms	Gordon, Alphonso	720000 DMS Traveler	Prox
0444	True	NA	cdillon@tracfone.com.stms	Dillon, Chelsey	720000 DMS Traveler	Prox
5573	True	NA	cindy.cast@miamidade.gov.stms	Cast, Cindy	720000 DMS Traveler	Prox
1029037	True	NA	rotag1@comcast.net.stms	Napier, Tom	720000 DMS Traveler	Prox
1231881	True	NA	cjackson@cityofpensacola.com.stms	Jackson, Cheryl	720000 DMS Traveler	Prox
6895	True	NA	david_konuch@comcast.com.stms	Konuch, David	720000 DMS Traveler	Prox

View Selected Export

Figure 25 - UMC Report

There are two buttons at the bottom of the report window.

- After selecting an individual record, clicking the “View Selected” button will display the selected user record.
- Clicking the “Export” button will export all the information in the window, along with additional fields not in this report. The export is automatically opened in excel in CSV format. The ID (PF ID or Last 4 of SSN), will not be exported for security and privacy reasons. (Figure 26Error! Reference source not found.Error! Reference source not found.) Blank values in multiple fields in the exported report indicate accounts that have not been configured in the UMC.

1925328320 - Excel

	A	B	C	D	E	F	G	H
1	Name	Email	SamAccountName	Profile	Role	EmployeeType	Leadership	HC
2	test, test	test@test.local	test@test.local.stms	Proxy Traveler	720000 DMS Traveler	Non-Employee	No	Nc
3	F	f	f	Proxy Traveler	720000 DMS Traveler	Non-Employee	No	Ye
4	T	t	t	Proxy Traveler	720000 DMS Traveler	Non-Employee	No	Ye

Figure 26 - Users Report Export



## Settings

On the Main Menu screen, the “Settings” button is disabled. If changes are needed to the settings, please contact your Agency IT. (Figure 27)

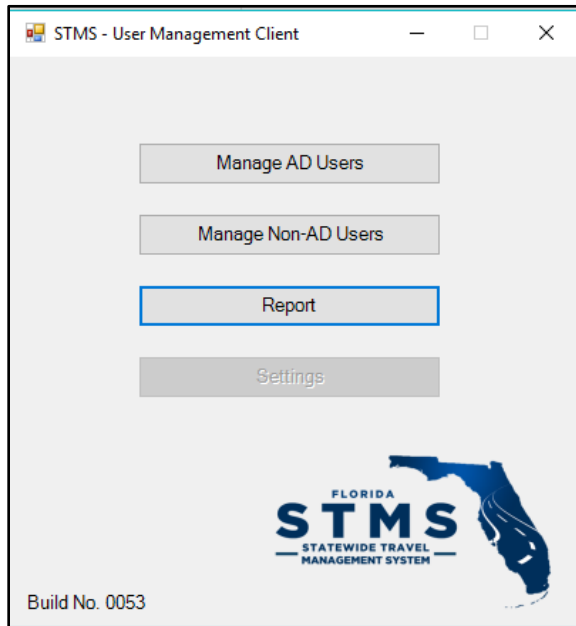


Figure 27 - UMC Main Menu Screen Showing Settings Button Disabled

## USER ACCOUNT CHANGES

The User Management Client (UMC) utilizes data from People First, Active Directory and direct entry 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	Preparer Email - UMC
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