



Agency STMS Administrator Manual

Version 2.0
October 2019

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.

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INTRODUCTION

Agency STMS Administrators (AA) 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 System Administrators (SA). 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. The videos are available 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 System Administrators (SA). 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 SA 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.myflorida.com and the SA 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 an agency is ready to go live, the STMS System Administrator sends a system generated email to the Agency STMS Administrator (AA) email address with the user name and a link to create a new password.

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

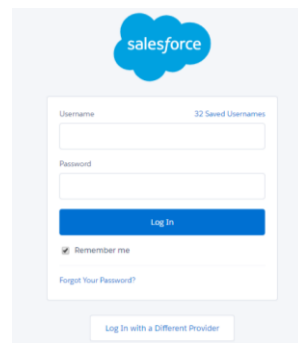


Figure 1 - STMS Login

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.myflorida.com, if you encounter issues logging into STMS as the Agency STMS Administrator.

Reassign the Agency STMS Administrator Account

To reassign the Agency STMS Administrator (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 Agency STMS Administrator 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 System Administrators (SA)

Tier 3 – STMS vendor developers

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 SA. 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.

SA 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*.

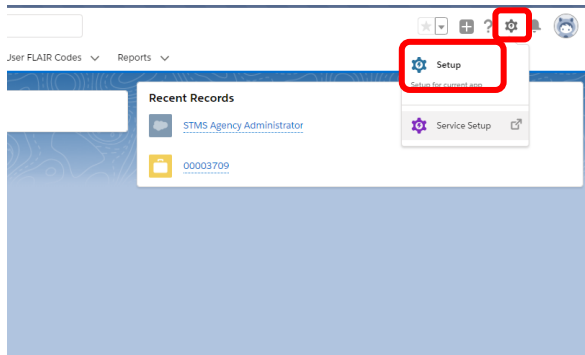


Figure 2 - Setup Menu

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

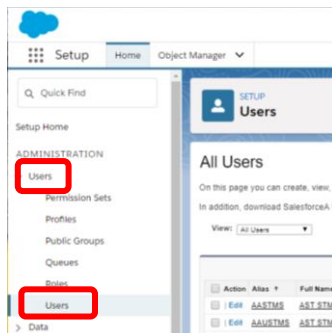


Figure 3 - Users Information

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 that you are sorted on, you can then click on a specific letter to display only results that start with that letter

The screenshot shows the STMS Users management interface. The left sidebar contains a navigation menu with 'Users' highlighted. The top navigation bar includes a 'Search Setup' field. The main content area displays a table of users. The table has columns for 'Action', 'Alias', 'Full Name', 'Username', 'Profile', 'Role', 'Active', 'Is Frozen', 'OLO Code', 'Created By', 'Created Date', 'Last Modified Date', and 'Last Modified By'. The 'Users' column header is highlighted with a red box. The table lists various users, including 'Enterprise Admin', 'Agency Admin', 'Agency Auditor', 'Agency Head', 'Agency Fiscal Accountant', 'Agency Payment Approver', 'Agency Preparer', 'Agency Traveler', and 'Self Approver'.

Figure 4 - Searching Users Information

Once you have located the account, click on the user's name to view their account information as shown in *Figure 5* and *Figure 6*, on the next page. Among the information you can view with a record are:

- 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, 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)
- 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 SA.

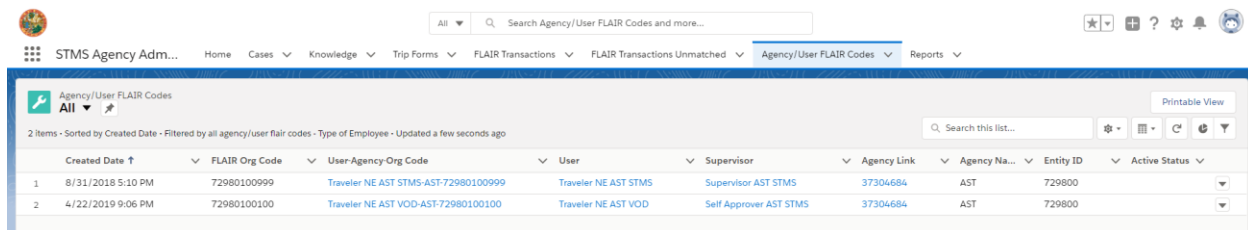
Figure 6- Additional User Information

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, click on the "Agency/User FLAIR Codes" tab option from the menu bar near the top of the screen to access Agency/User account information.

Select the "All" List View to display all the records for your agency in the List View or you can search by a user's name by typing the user's name in the search bar as shown in *Figure 7*.



	Created Date ↑	FLAIR Org Code	User-Agency-Org Code	User	Supervisor	Agency Link	Agency Name	Entity ID	Active Status
1	8/31/2018 5:10 PM	72980100999	Traveler NE AST STMS-AST-72980100999	Traveler NE AST STMS	Supervisor AST STMS	37304684	AST	729800	
2	4/22/2019 9:06 PM	72980100100	Traveler NE AST VOD-AST-72980100100	Traveler NE AST VOD	Self Approver AST STMS	37304684	AST	729800	

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. 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 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 (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 displays 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

The screenshot displays the STMS Agency Admin interface. The top navigation bar includes links for Home, Cases, Knowledge, Trip Forms, FLAIR Transactions, and Agency/User FLAIR Codes. The main content area is titled 'Agency/User FLAIR Codes' and 'Traveler NE AST STMS-AST-72980100999'. The 'Details' tab is selected, showing a form with fields for User-Agency Org Code, User, Supervisor, and various status flags. The 'Activity' tab on the right shows filters and a list of upcoming and overdue items, including a 'Trip Forms (1)' section with a record for '54885'.

Figure 8- Agency/User Code Details

Location of UMC field data within STMS

You can verify that UMC changes have synced with by reviewing the Last Modified Date Fields the within the User information within Setup and Agency User FLAIR Codes areas. The table in *Figure 9* 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

Figure 9 - 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 10.

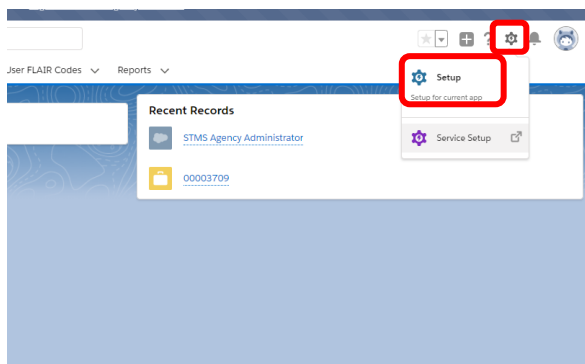


Figure 10 - Setup

On the left navigation bar click on "Users" and then click on the "Users" sub-menu as shown in Figure 11.

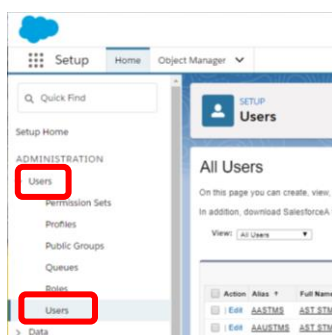


Figure 11 - Users Information

Then click on the drop-down menu for View as shown in *Figure 12* and change the selection to “Provisioning Duplicate”.

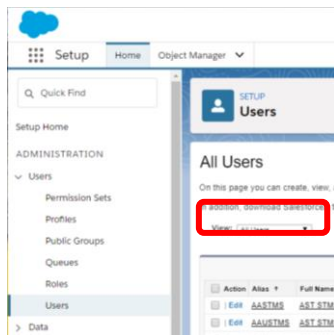


Figure 12- User List Views

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 13*.

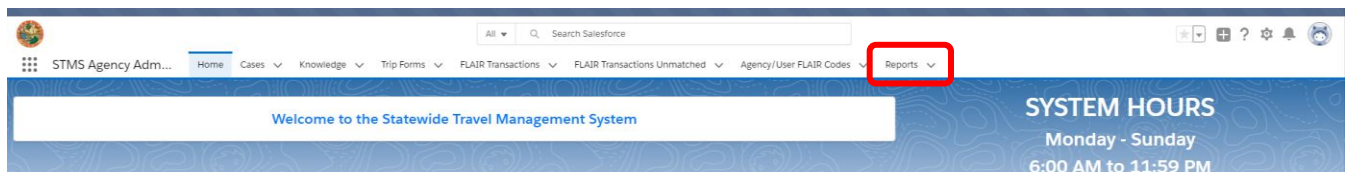


Figure 13 - Reports Tab

Agency STMS Administrators (AA) have access to all 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 14. Alternatively, you can search all the available reports by typing within the search bar.

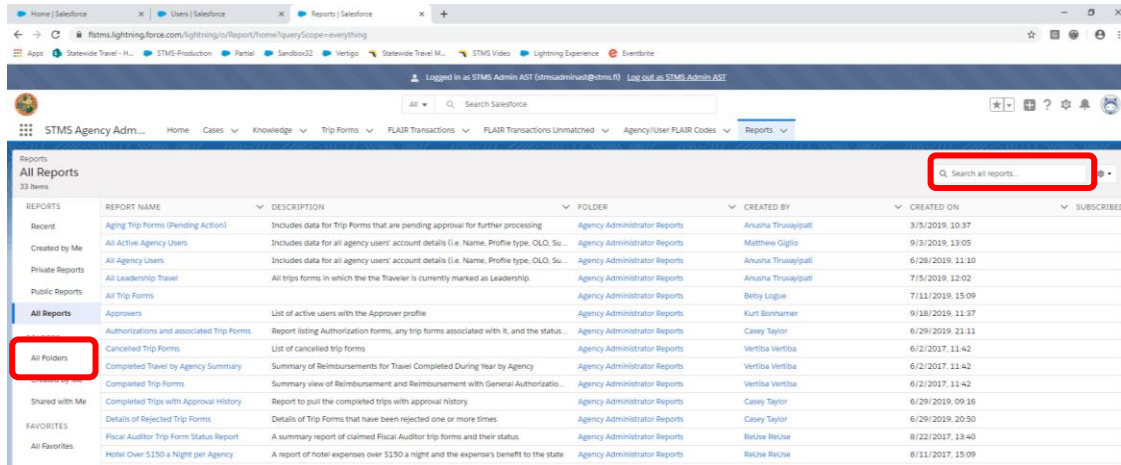


Figure 14- Available Reports

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.
- “Filter” (Funnel icon) button allows for filtering the data in the report.
- “Export” button allows for the export of the report to Excel. Some reports have an “Add Chart” button.
- 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.

CASE MANAGEMENT

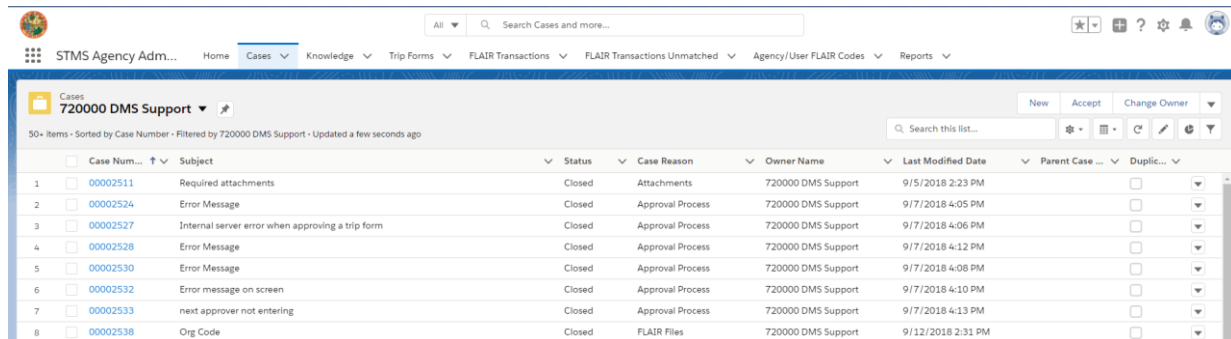
The Case Management functionality in STMS enables users to communicate issues, suggestions, and questions relating to system functionality and to submit Knowledge article and report requests. All users are able to create cases, but Agency STMS Administrators, and STMS System Administrators (SA), have 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 SA (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 is displayed on Figure 15



Case Num...	Subject	Status	Case Reason	Owner Name	Last Modified Date	Parent Case ...	Duplic...
00002511	Required attachments	Closed	Attachments	720000 DMS Support	9/5/2018 2:23 PM		
00002524	Error Message	Closed	Approval Process	720000 DMS Support	9/7/2018 4:05 PM		
00002527	Internal server error when approving a trip form	Closed	Approval Process	720000 DMS Support	9/7/2018 4:06 PM		
00002528	Error Message	Closed	Approval Process	720000 DMS Support	9/7/2018 4:12 PM		
00002530	Error Message	Closed	Approval Process	720000 DMS Support	9/7/2018 4:08 PM		
00002532	Error message on screen	Closed	Approval Process	720000 DMS Support	9/7/2018 4:10 PM		
00002533	next approver not entering	Closed	Approval Process	720000 DMS Support	9/7/2018 4:13 PM		
00002538	Org Code	Closed	FLAIR Files	720000 DMS Support	9/12/2018 2:31 PM		

Figure 15- Cases Queue

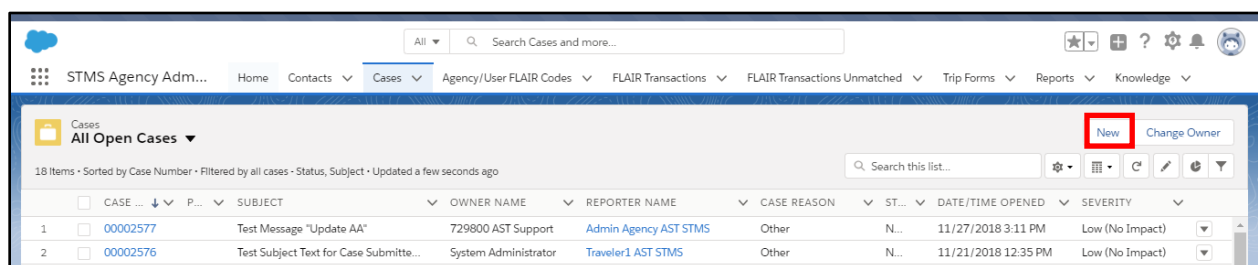
List Views available to AAs include:

- **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 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 selecting 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 16.



CASE ...	P...	SUBJECT	OWNER NAME	REPORTER NAME	CASE REASON	ST...	DATE/TIME OPENED	SEVERITY
00002577		Test Message "Update AA"	729800 AST Support	Admin Agency AST STMS	Other	N...	11/27/2018 3:11 PM	Low (No Impact)
00002576		Test Subject Text for Case Submitte...	System Administrator	Traveler1 AST STMS	Other	N...	11/21/2018 12:35 PM	Low (No Impact)

Figure 16 – New Button on Case List View

In the New Case popup, enter case information in each field as necessary, as displayed in Figure 17. Required fields are marked with a red asterisk (*).

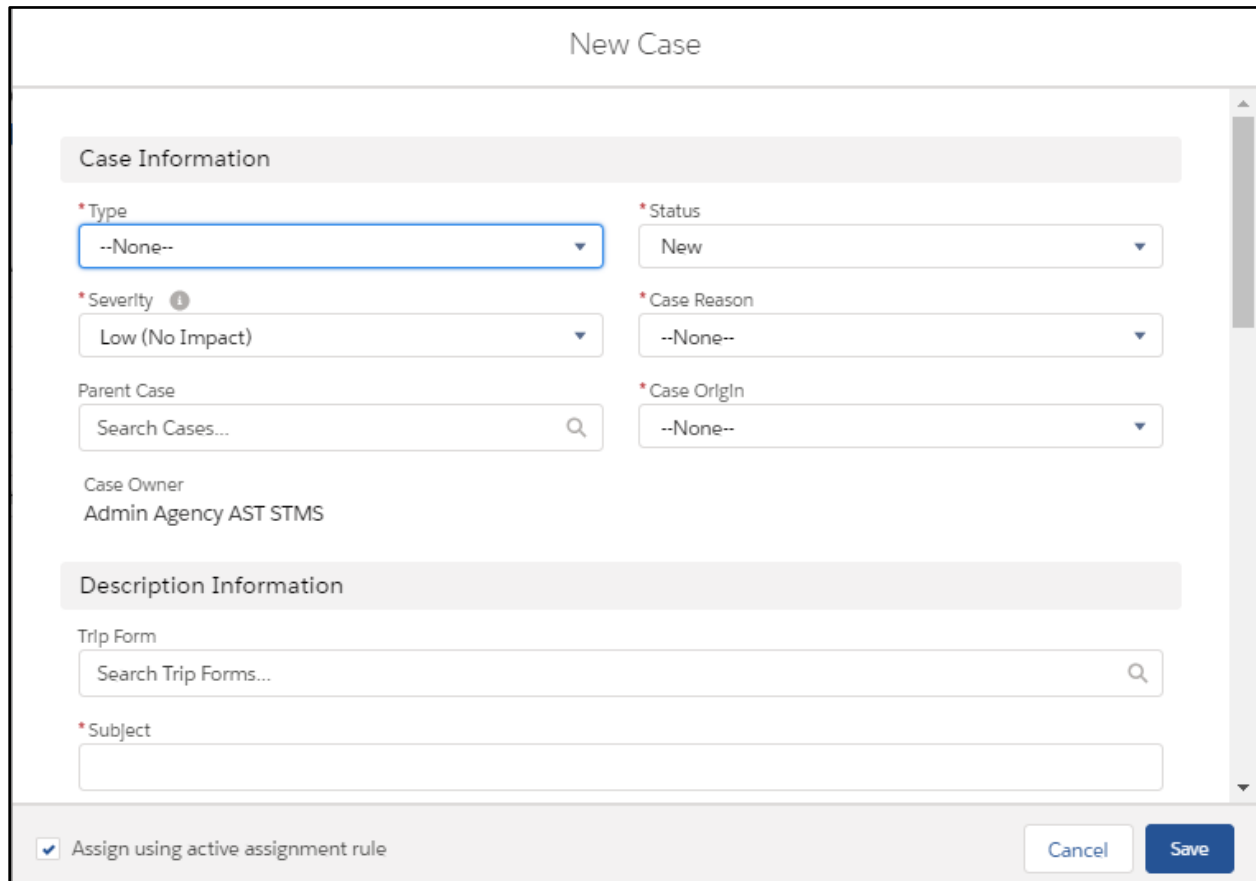


Figure 17 - New Case Popup

The fields to create a new case are as follows:

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

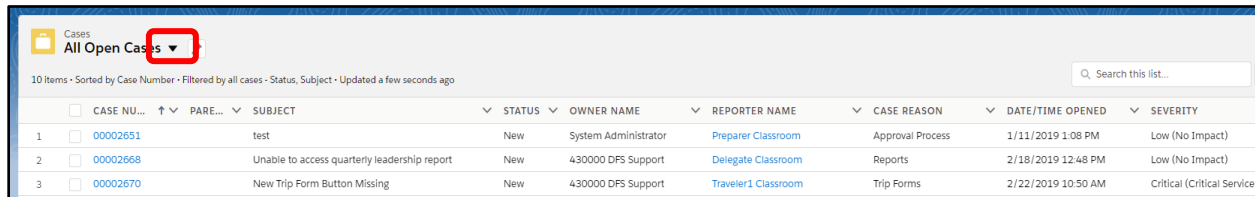
- Testing in Production – solution deployed in production; testing in production
 - On Hold – not able to address the issue at this time
 - Closed – issue has been resolved
 - Cancelled – case created in error
- ***Severity** – Identifies immediacy/urgency of the case.
 - Critical – System has stopped 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
 - Expense Line Items
 - FLAIR Files
 - FLAIR Transactions
 - Help Text
 - Knowledge
 - Personal Settings
 - Reports
 - 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 occurring (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 was the case 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 by the system.

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 Agency STMS Administrator (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 Figure 18



CASE NU...	PARE...	SUBJECT	STATUS	OWNER NAME	REPORTER NAME	CASE REASON	DATE/TIME OPENED	SEVERITY
1	00002651	test	New	System Administrator	Preparer Classroom	Approval Process	1/11/2019 1:08 PM	Low (No Impact)
2	00002668	Unable to access quarterly leadership report	New	430000 DFS Support	Delegate Classroom	Reports	2/18/2019 12:48 PM	Low (No Impact)
3	00002670	New Trip Form Button Missing	New	430000 DFS Support	Traveler1 Classroom	Trip Forms	2/22/2019 10:50 AM	Critical (Critical Service)

Figure 18 - 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-level 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 of the necessary information to evaluate the Case – they can close the case escalate the case to the STMS System Administrator.

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 should 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 19). Information on how the case was resolved must also be included in the Resolution field. For Issue type cases, the Resolution field is required.

The screenshot shows the 'Case View' for Case Number 00002577. The case is titled 'Test Message "Update AA"'. The status is 'New', severity is 'Low (No Impact)', and type is 'Issue'. The 'Details' tab is active, showing 'Case Information' and 'Description Information'. The 'Status' field is highlighted with a red box, indicating it can be edited. The 'Case Owner' is '729800 AST Support'. The 'Milestones' section shows 'No milestones to show.' and the 'Activity' section shows a recent update from 'Admin Agency AST STMS'.

Figure 19 – 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 20 - Case Owner)

The screenshot shows the 'Case View' for Case Number 00002670. The case is titled 'New Trip Form Button Missing'. The status is 'New', severity is 'Critical (Critical Service Impact)', and type is 'Issue'. The 'Details' tab is active, showing 'Case Information' and 'Description Information'. The 'Case Owner' is '430000 DFS Support'. The 'Change Owner' icon is highlighted with a red box, indicating it can be clicked to escalate the case to the SA.

Figure 20 - Case Owner

In the Change Case Owner popup, click the dropdown and select Queues shown on *Figure 21*.

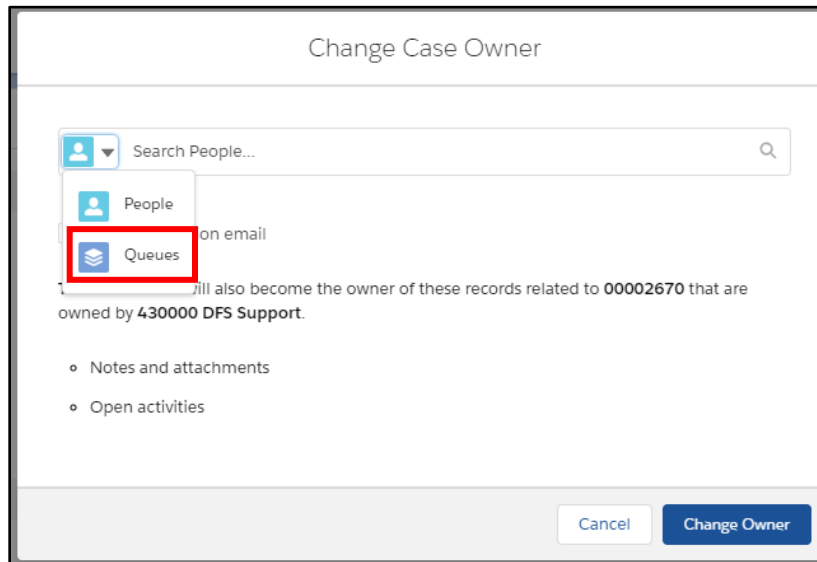


Figure 21 - Change Case Owner

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 SA evaluates the case and attempt to provide a solution.

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 or Tier 3 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 22*. A user can be tagged in a post by typing “@Name”. The Case posts function 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 Cases statuses is displayed in this area, as well.

The screenshot shows the 'Case Test Case' detail page. The left sidebar contains tabs for 'Details', 'Activity', 'Related', and 'Knowledge'. The 'Details' tab is active, showing case information, description, and reporter details. The right sidebar shows 'Milestones' and a 'Post' tab. A red box highlights the 'Post' tab and the 'Write a comment' box.

Figure 22 – 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, Tier 2, and Tier 3 support personnel.

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 System Administrator 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 23*.

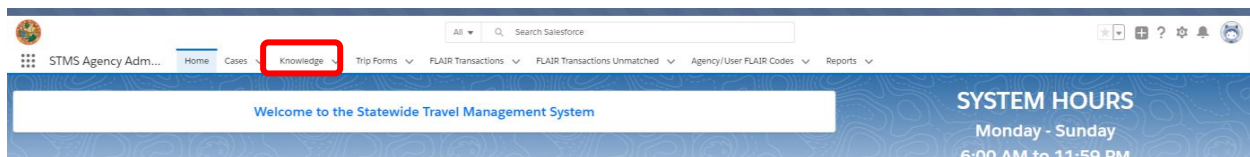


Figure 23- Knowledge Tab

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 the New button in the upper right corner of the Knowledge article list view, as highlighted in *Figure 24* or select New Knowledge under the Knowledge dropdown.

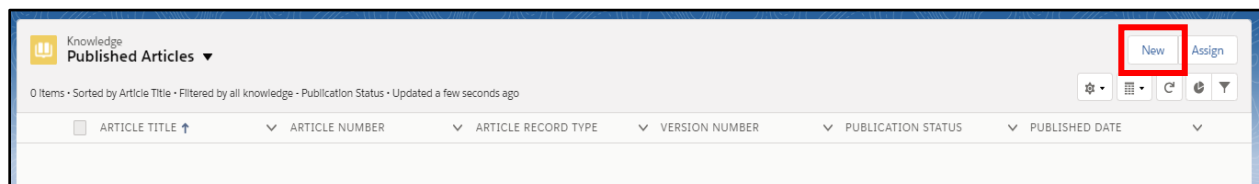


Figure 24 – New Button on Knowledge List View

Select the type of Knowledge Article and click the Next button, as displayed in *Figure 25*

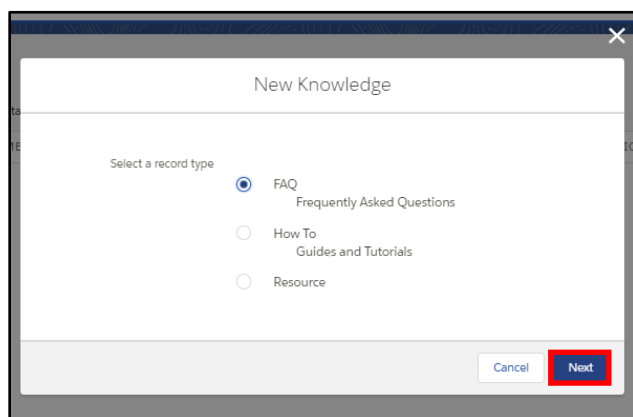


Figure 25 – New Knowledge Record Type Selection Popup

Supply the requested information in the New Knowledge Article popup and click Save to proceed or Save and New to prepare another knowledge article, as highlighted in *Figure 26*.

Figure 26 – New Knowledge Article (FAQ) Popup

Categories provide quick search terms and determine visibility for the Knowledge Article. **If this section is left blank, Agency Administrators 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 27*, and select Edit. The Edit Articles Categories pop-up window is now available.

Figure 27 – Categories Dropdown on Knowledge Article

Click on the STMS dropdown menu, STMS key terms display. Select the appropriate key terms. For this Knowledge Article, we will select all categories and select Resources and then Policies and Manuals.

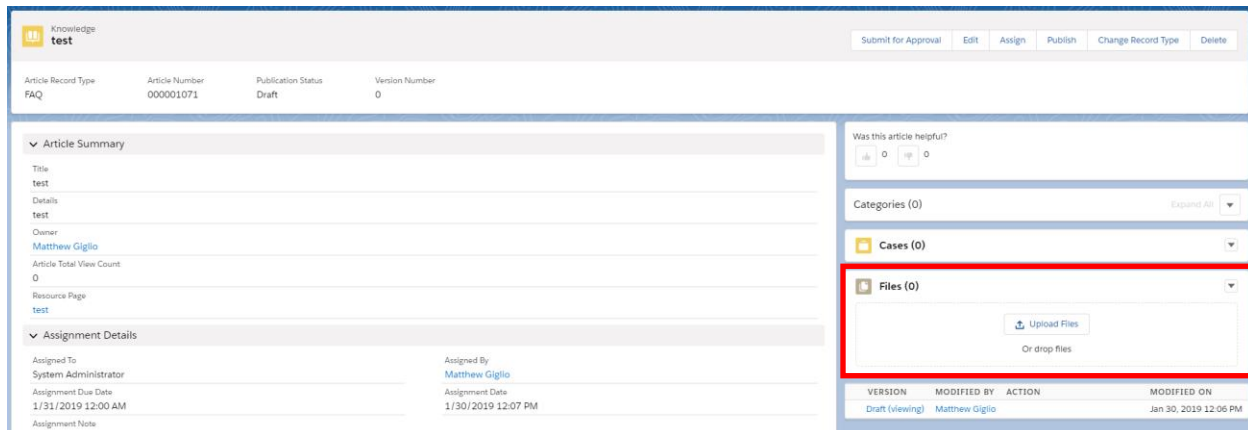
Next, click on the Visibility dropdown menu. Identify who should have access to this knowledge article. If this is an agency-specific knowledge article, click on the Agencies and Departments drop down and select your agency. If the Knowledge Article should be viewed by all state agencies you can click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

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 28*.

Figure 28 – Edit Article Categories Popup

Files

A Knowledge Article may need to have supporting files. To upload a file, click on the Upload Files button on the right side of the screen, as shown in *Figure 29*. Navigate to the file and upload.

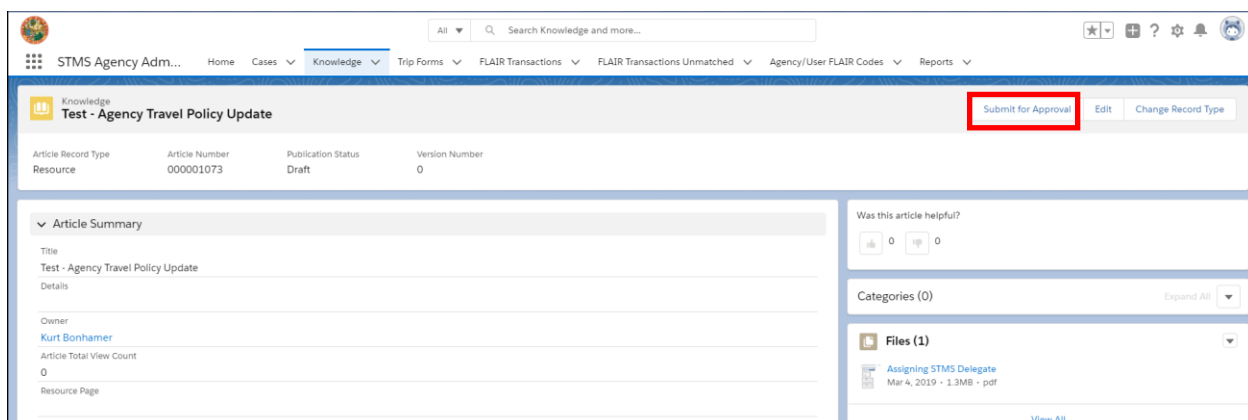


The screenshot shows the 'Knowledge' article interface for 'test'. The header includes buttons: 'Submit for Approval', 'Edit', 'Assign', 'Publish', 'Change Record Type', and 'Delete'. The article details show: Article Record Type: FAQ, Article Number: 000001071, Publication Status: Draft, Version Number: 0. The 'Article Summary' section includes fields for Title, Details, Owner (Matthew Giglio), Article Total View Count (0), Resource Page, and Assignment Details. The 'Files' section is highlighted with a red box and contains an 'Upload Files' button and the text 'Or drop files'. Below the 'Files' section is a table with columns: VERSION, MODIFIED BY, ACTION, and MODIFIED ON. The table shows a single entry: Draft (viewing), Matthew Giglio, Jan 30, 2019 12:06 PM.

Figure 29 - Upload Files for Knowledge

Submit for Approval

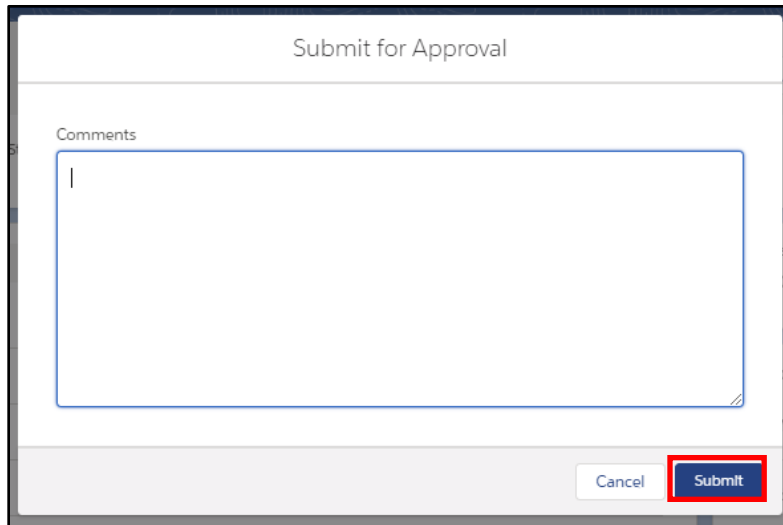
After establishing the categories and visibility, you may submit the draft content to the STMS System Administrator (SA) for review and publication by clicking the Submit for Approval button in the article's header bar, as shown in *Figure 30*.



The screenshot shows the 'Knowledge' article interface for 'Test - Agency Travel Policy Update'. The header includes buttons: 'Submit for Approval', 'Edit', and 'Change Record Type'. The article details show: Article Record Type: Resource, Article Number: 000001073, Publication Status: Draft, Version Number: 0. The 'Article Summary' section includes fields for Title, Details, Owner (Kurt Bonhamer), Article Total View Count (0), and Resource Page. The 'Files' section shows 1 file: 'Assigning STMS Delegate' (Mar 4, 2019 - 1.3MB - pdf). Below the 'Files' section is a 'View All' link.

Figure 30 – 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 31*.



The image shows a 'Submit for Approval' popup window. It has a title bar at the top that says 'Submit for Approval'. Below the title bar is a section labeled 'Comments' which contains a large, empty text area with a blue border. At the bottom right of the popup, there are two buttons: a 'Cancel' button and a 'Submit' button. The 'Submit' button is highlighted with a red rectangular border.

Figure 31 – Submit for Approval Popup

The STMS System Administrator reviews the article and take appropriate action.

CONTINUITY SUPPORT

Agency STMS Administrators should be familiar with the capabilities of STMS to help ensure any proposed agency changes to travel processing are compatible with STMS capabilities. Contact the STMS System Administrator if you have any questions.

RESOURCES

AAs should be familiar with all the training materials that are available for both users and User Administrators. Training materials are available on the STMS website at:

<https://www.dms.myflorida.com/STMS>.

AAs should be especially familiar with all the resources distributed at the system integration meetings. To determine if you have the latest versions of these documents, contact the STMS System Administrator.

CONTACT INFORMATION

Communicate issues and requests to the STMS System Administrators (SA) by submitting a case within STMS. You can also contact the SA by phone at (850) 410-0007 or by email at

stms.support@dms.myflorida.com.

User Account Changes

The User Management Client (UMC) utilizes data from People First, from 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 System Administrator through the Case feature in STMS
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

COMMON CASES IN STMS

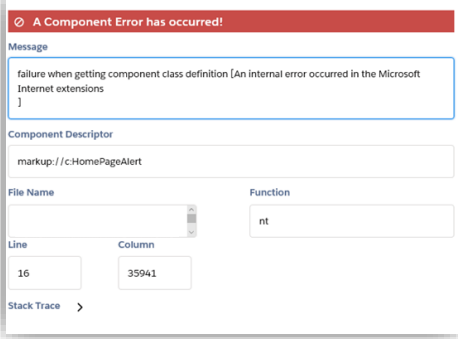
Below are some common cases that are encountered by users in STMS. The cases are grouped based on similarity.

If the Agency STMS Administrator is able to resolve the case, they should enter the resolution description and close the case. See the Agency STMS Administrator Manual for details.

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	<p>User has a Component Error message</p> 	<p>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.</p>
2	<p>Invalid Delegate Error Message received</p> <p>The person you are attempting to send the trip form to does not have a valid delegate user set. The approver must select a valid delegate to proceed, or another approver should be selected.</p>	<p>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.</p>

Expense Line Items

	Case Description	Action - Resolution
1	How can a user remove an Expense Line Item (ELI) from a trip form?	Advise the user to zero out the expense line item. If the ELI is an auto-calculated one, such as per diem, change it to one that is not auto-calculated and then zero it out. The Comment field on the ELI can be used to provide an explanation, if necessary.
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.	<p>Type the trip form number in the search bar to determine if it appears in the search feature.</p> <p>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.</p> <p>Check the UMC to ensure their role and profile are both set to "Approver".</p>

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	<ul style="list-style-type: none"> 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. Agency STMS Administrators 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 Centrify – contact Centrify support (DST or agency provided) to verify that Centrify is syncing with Active Directory – include the user name, and details of the change. If a user was removed from your agency's travel group in Active Directory and later added back into Active Directory group, Centrify will not handle synchronization correctly. Open a Case with the System Administrator, including name on the account

Email Notifications

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

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.

Agency STMS Administrators (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 is no longer needed in STMS, please 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, please open a case.
- 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 Agency STMS Administrator 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.