Approver Guide

NAVIGATION

Logon to STMS
1. Go to the STMS website:
   http://dms.myflorida.com/STMS
2. Enter your Username and Password
3. Click the Login button

Your Home Screen
1. To view one of your trip forms, click the link the Form ID column.
2. To create a new trip form, click the New button.
3. The Status column provides you with a way to quickly and easily find out the status of your trip forms.
4. The Trip Forms to Approve section displays only the trip forms that need your attention.
5. The My Delegated Approval Forms section displays the trip forms that you need to approve on another Approver’s behalf.

Logoff
1. To log out of STMS, click on your user profile image at the top right of your screen and select the Log-out link.

DYNAMIC APPROVAL PROCESS

Approving a Form
1. To approve a trip form, go to the trip form screen.
2. In the Approval History at the top of the trip form screen, click on the Approve link.
3. Click the “I hereby certify...” checkbox.
4. Click the Approve button.
5. If you are the Final Approver, click the Yes button.
6. If you are not the Final Approver, click the No button.
7. If you clicked the No button, select the next approver by typing in the approver’s name in the Select Next Approver field.
8. Click the radio button beside the approver’s name.
9. Enter any notes in the Comment field.
10. Click the Submit button.

Rejecting a Form
1. To reject a trip form, go to the trip form screen.
2. In the Approval History at the top of the trip form screen, click on the Reject link.
3. Enter any notes in the Comment field.
4. Click the Submit button.

APPROVAL HISTORY

1. From the My Trip Forms section on your Home screen, click the link for the trip form.
2. The Approval History is displayed at the top of the Trip Form Details screen.

Did you know...?
The Approval History section of your trip form displays a historical record of all actions taken on this form.
**APPROVER GUIDE**

**SECURING A TRIP FORM**

**Securing a Trip Form**
To remove the details of a trip from reports, click the *Secure Record* button on the trip form screen.

**Un-securing a Trip Form**
When you are ready to unsecure a trip form, click the *Unsecure Record* button on the trip form screen.

**SELECTING A DELEGATE APPROVER**

**Assigning a Delegate**
1. To assign a Delegate, click on the profile picture in the upper right corner of the screen.
2. Click on the *Settings* link.
3. In the left navigation bar of the Personal Information screen, click on *Approver Settings*.
4. In the Delegated Approver field, click on the magnifying glass *Search* icon.
5. In the *Search* pop-up window, enter in the name of the person you want to assign as your delegate.
6. Click on the *Go* button.
7. Click on the Approver’s Name in the search results.
8. Click on the *Save* button.

**CHATTER**

**Sending a Chatter Message**
1. Navigate to Chatter by clicking on the *Chatter Feed* tab on the *Trip Form* screen.
2. Type the @ symbol followed by the recipient’s name.
3. Enter the message text.
4. Click the *Share* button.

**Viewing Trip Form Action History**
1. Navigate to Chatter by clicking on the *Chatter Feed* tab on the *Trip Form* screen.
2. Scroll down on the *Chatter Feed* screen to view all the actions that have been taken on this trip form.

**Did you know...?**

Chatter can be used for a variety of purposes including:
- Review of Trip Forms
- Requests for help on a Trip Form
- Discussion in the Approval Process

Chatter content is subject to public records requests. Be sure to use the same professionalism you would in an email message.

For additional resources, please visit

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