

INTRODUCTION TO THE PROFILES IN STMS

The Statewide Travel Management System (STMS) provides you with the ability to electronically enter and track State of Florida travel.¹ Within each Agency, the chain of approval will be based on your agency's current approval process. Before we get started, there are several terms that should be defined.

Profiles

In Salesforce, a **profile** determines what a user can do. Profile names match the duties performed by the user with that profile. There are 2 types of profiles: Functional and Administrative. Each user can have only one Functional Profile. Certain users may have additional Administrative Profiles.

Functional Profiles

Traveler

A Traveler is a person who travels on behalf of the State of Florida and submits forms for themselves. Traveler is the default profile. People with this profile:

- Can create trip forms for themselves
- Cannot function as a Preparer, Approver, or Fiscal Accountant

Proxy Traveler

A Proxy Traveler is any person who travels on behalf of the State of Florida but requires a preparer to submit travel forms on their behalf. People with this profile will not have access to the system.

Preparer

A Preparer can draft trip forms for others. People with this profile:

- Can create trip forms for others
- Can function as a Traveler
- Cannot function as an Approver or Fiscal Accountant

Approver

An Approver reviews submitted trip forms for submission to Fiscal Accountants for processing. People with this profile:

- Can approve forms for others
- Can function as a Traveler
- Can function as a Supervisor or Delegate (these attributes are not profiles)
- Cannot function as a Preparer or Fiscal Accountant

There are four types of approvers:

Reviewer

- Cannot provide final approval for Authorizations
- Cannot provide final approval for Advances/Reimbursements

¹ Travel expenses paid via vendor contract are not processed using STMS.

Payment Approver

- Cannot provide final approval for Authorizations
- Can provide final approval for Advances/Reimbursements

Agency Head or Delegate

- Can provide final approval for Authorizations
- Can provide final approval for Advances/Reimbursements

Self-Approver

- Can approve their own forms
- Can final approve Authorizations
- Can final approve Advances/Reimbursements

Fiscal Accountant

A Fiscal Accountant processes authorized Advances, Reimbursements, and Reimbursements with General Authorizations for payment. People with this profile:

- Process trip forms for payment
- Process transactions to FLAIR
- Can function as a Traveler
- Cannot function as a Preparer or Approver

Administrative Profiles

Auditor

An Auditor has access to trip forms within an Agency. People with this profile:

- Can view all trip forms in a read-only mode
- Cannot function as a Preparer, Traveler, Approver, or Fiscal Accountant

Reporter

A Reporter can run reports within an agency. People with this profile:

- Can run reports in the STMS
- Cannot view trip forms
- Cannot function as a Preparer, Traveler, Approver, or Fiscal Accountant

Agency STMS Administrator

The Agency STMS Administrator is the primary point of contact for an Agency. There can only be one Agency STMS Administrator per agency. People with this profile:

- Manage agency Users in both the STMS and the User Management Client (UMC)
- Manage agency User Administrators
- Manage cases within the agency
- Manage knowledge articles within the agency
- Can view trip forms in a read-only mode
- Can run reports
- Cannot function as a Preparer, Traveler, Approver, or Fiscal Accountant