



AGENCY INTEGRATION CHECKLIST

<<Agency Name>>

The Department of Management Services is excited to integrate the Statewide Travel Management System (STMS) with your agency. To assist with the onboarding process, the DMS STMS Team has developed an integration tool to track processes and activities, ensuring a smooth transition for your employees. Recognizing that each agency has unique needs, the DMS STMS Team will work with your agency to create a customized implementation plan that addresses the areas noted below based on the timeframe and methods that work best for your agency. In addition, the DMS STMS Team will provide an Integration Manager dedicated to guiding your agency through implementation.

Contact Information for <<Agency>>			
Integration Manager	<<Name>>	<<Email>>	<<Phone>>
Agency Point of Contact			
Agency Planning Lead			
Agency Training Lead			
Agency Communications Lead			
Agency Active Directory Lead			
Agency STMS Administrator			



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Agency Implementation & Considerations		Date
1.	Agency Kickoff Meeting	
2.	Identify Agency Leads for STMS (Refer to STMS Roles & Responsibilities)	
3.	Implementation Planning Meeting	
4.	How will the Agency onboard users? (Refer to STMS Sample Agency Integration Plan) Iteratively (in waves/phases) Mass onboard of all users	
5.	Provide Mission Critical Statements to the STMS Team (Refer to Mission Critical Considerations)	
6.	Set-up T-9 Site Codes for Accountants	
7.	Implement use of compatible browser <ul style="list-style-type: none"> 1. Google Chrome (optimized) 2. Mozilla Firefox 3. Safari 4. Microsoft Edge *STMS is not compatible with Internet Explorer	



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Training & Communications		Date
1.	STMS Training & Communications Meeting	
2.	Fiscal Accountants attend training led by STMS Team	
3.	Agency Administrator attends training led by STMS Team	
4.	User Administrators attend training led by STMS Team a. Training for User Admin Interface Tool	
5.	Agency provides STMS training & communication strategy (Refer to STMS Training Plan and STMS Communication Templates) a. Agency-led training b. Use online STMS training resources	
6.	Agency Trainers attend STMS Travel Guide/Train-the-Trainer sessions led by STMS Team (a separate training checklist will be provided during Train the Trainer sessions)	
7.	Provide User Agreement collection strategy to STMS Team (Refer to STMS User Agreements)	
8.	Agency communication to staff about STMS onboard process and timeline (a communications package will be made available to your agency's communication team.)	
9.	Agency communicates guidelines within STMS (Refer to Agency Policy/Procedure Considerations)	

User Management Checklist		Date
1.	STMS Team and agency conduct User Management Meeting	
2.	STMS Team provides Active Directory Script to Agency IT	
3.	STMS Team provides Employee Bulk Load Spreadsheet template	
4.	STMS Team provides Non-Employee Bulk Load Spreadsheet template	
5.	Agency provides Active Directory Script results to STMS Team	
6.	Agency provides completed Employee Bulk Load Spreadsheet	
7.	Agency provides completed Non-Employee Bulk Load Spreadsheet	
8.	STMS Team verifies data in Employee and Non-Employee Bulk Load Spreadsheets	
9.	Agency decides on use of Azure or Centrify	
10.	Agency selects attribute within Active Directory to store STMS-related data	
11.	STMS schedules Active Directory Configuration Meeting with Agency	
12.	Conduct meeting to configure Agency Active Directory for STMS	
13.	Schedule User Loading Meeting with Agency	
14.	Conduct meeting to load users into STMS	
15.	STMS Team provides the agency with a report of users loaded into STMS	
16.	Agency STMS Administrator identifies User Administrators	
17.	Agency installs User Management Client on User Administrators' computers	
18.	Agency configures User Admins permissions to make changes to Active Directory	
19.	STMS Team provides training to User Administrators	
20.	Agency grants access to Agency Users for emails sent from Salesforce	
21.	Agency User Admins utilize UMC to add Non-Active Directory Users	



AGENCY STMS AGREEMENT

BY SIGNING THIS FORM, THE AGENCY ACKNOWLEDGES THE CONDITIONS UNDER WHICH ACCESS TO THE STMS IS GRANTED, AND AGREES TO THE FOLLOWING TERMS OF USE:

1. The Agency understands the agency is responsible for updating the active directory when users are terminated to inactivate users. The agency agrees to review groups and roles of individuals in the event that they are hired, promoted, demoted, or terminated.
2. The Agency understands that users should not have multiple roles in the system unless it is absolutely necessary.
3. The Agency agrees to train all users in accordance with agency policies and procedures and in a timely manner.
4. The Agency understands that STMS displays sensitive information and agency policy should direct users to use discretion when reviewing this information.
5. The Agency understands that policy should direct users to redact all confidential information (such as account numbers or social security numbers), from attachments that are appropriate and pertinent documents only and ensure the documents are legible.
6. The Agency understands that the Trip Report, accessed through STMS, will be the official record for each travel event.
7. The Agency agrees to designate an Agency STMS Administrator who will respond to user questions about STMS prior to escalation and report to the Agency if any unusual activity, including suspicious transactions, account misuse, or abuse is observed.
8. The Agency agrees to ensure that all transactions are valid obligations of the State of Florida.
9. The Agency understands that under no circumstances will the agency use STMS for personal gain or for the personal gain of others. Willful actions for personal gain, unauthorized access, or unauthorized use of information contained in the STMS may result in disciplinary actions up to and including termination of employment and prosecution to the extent permitted by law.

Agency STMS Administrator Name (Print)

Agency Head or Designee (Print)

Agency STMS Administrator Signature

Agency Head or Designee Signature

Date

Date

Received by DMS STMS Bureau Team Representative:

Name/Title/Date