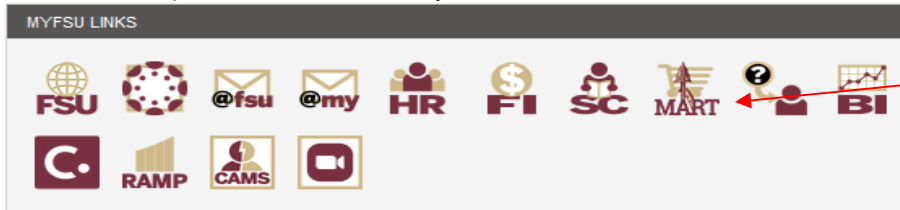


Overview

Setting up your **User Profile** is intended to make creating future requisitions much easier and more efficient as it will save you from manually having to type in information such as your Ship To Address, ChartField Information and Supervisor each time you create a requisition. You can set **defaults** for this information to automatically display in each cart as well as your favorite ChartField String combinations.

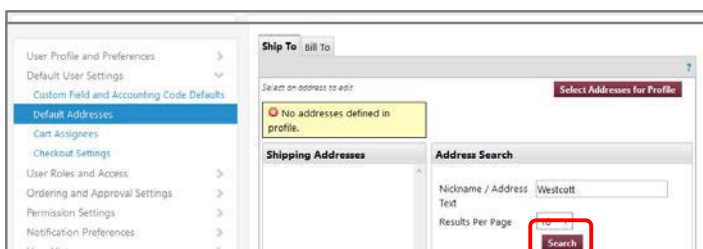
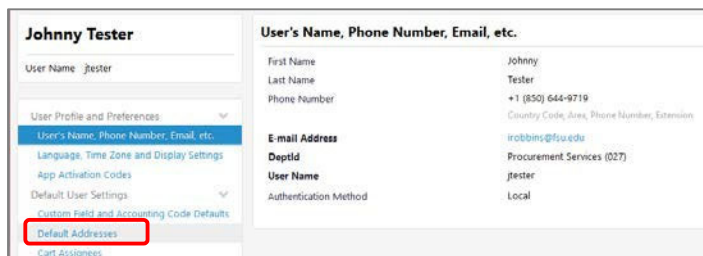
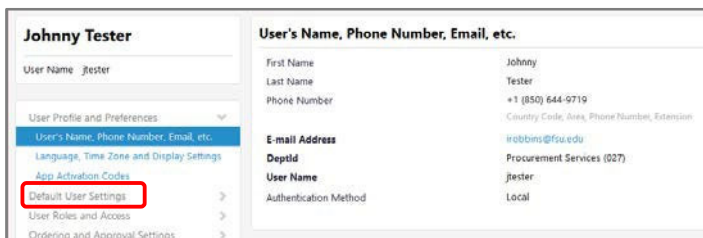
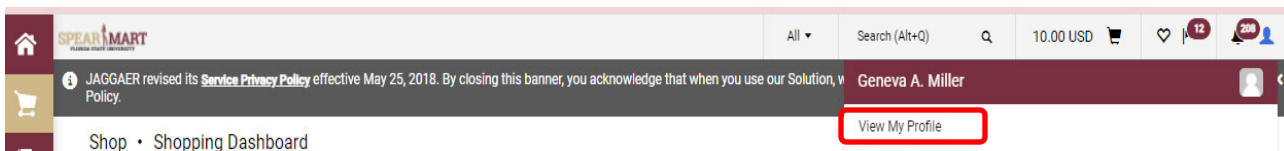
Access SpearMart by navigating to <https://my.fsu.edu/> and logging in with your MyFSU username and password, and then click the SpearMart Icon under MyFSU Links:



This Job Aid will cover how to set up the following in your profile:

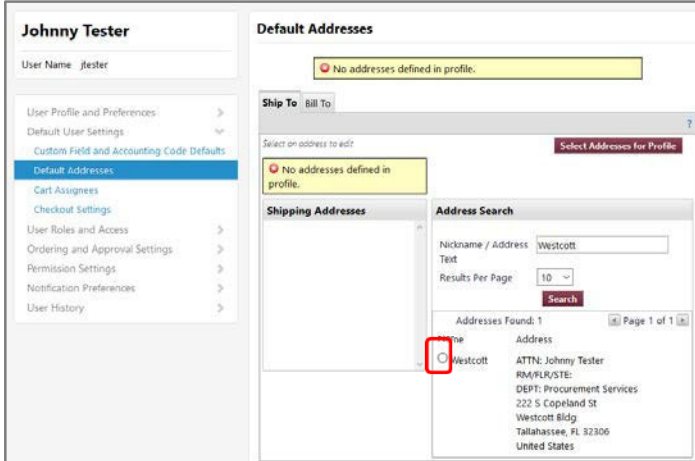
- [Ship to Addresses](#)
- [Chart Fields](#)
- [Chart Field String Favorites](#)
- [Supervisor](#)
- [Notification Preferences](#)

Setting Up Your Ship To Address



Enter the Nick Name of the building, for example, "Westcott". Click the **Search** button.

JOB AID Setting Up Your Profile



Johnny Tester
User Name: jtester

Default Addresses

Ship To: Bill To

No addresses defined in profile.

Shipping Addresses

Address Search

Nickname / Address: Westcott

Text

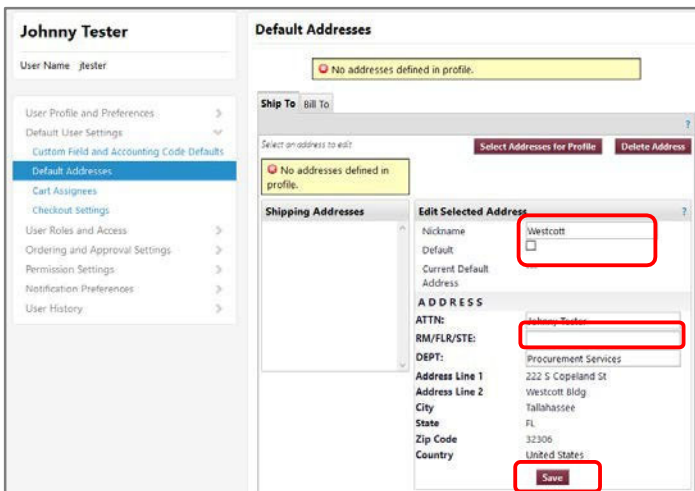
Results Per Page: 10

Search

Addresses Found: 1 Page 1 of 1

The	Address
<input type="checkbox"/>	Westcott ATTN: Johnny Tester RM/FLR/STE: DEPT: Procurement Services 222 S Copeland St Westcott Bldg Tallahassee, FL 32306 United States

- If the address you seek is listed, click the option button beside the appropriate address.
- If you don't find your Ship To Address, try the following:
 - Search using your street name in the Address Text field, for example, "Copeland".
 - If you cannot find your Ship To address, E-mail spearmart@fsu.edu that you are having trouble locating your Ship To address and include the name of your building, your department and your college.



Johnny Tester
User Name: jtester

Default Addresses

Ship To: Bill To

No addresses defined in profile.

Shipping Addresses

Edit Selected Address

Nickname: Westcott

Default:

Current Default Address

A D D R E S S

ATTN: Johnny Tester

RM/FLR/STE:

DEPT: Procurement Services

Address Line 1: 222 S Copeland St

Address Line 2: Westcott Bldg

City: Tallahassee

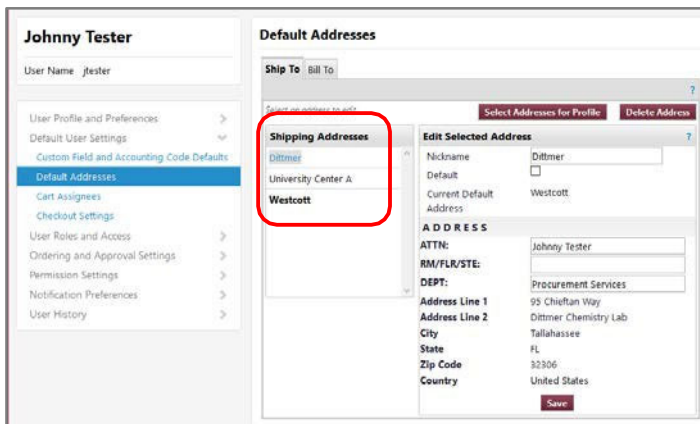
State: FL

Zip Code: 32306

Country: United States

Save

- Give your Ship-to address a nickname
- Check the box next to **Default** if you would like the system to auto populate the Ship To Address for each requisition
- Enter the room, floor, or suite number



Johnny Tester
User Name: jtester

Default Addresses

Ship To: Bill To

No addresses defined in profile.

Shipping Addresses

Dittmer

University Center A

Westcott

Edit Selected Address

Nickname: Dittmer

Default:

Current Default Address: Westcott

A D D R E S S

ATTN: Johnny Tester

RM/FLR/STE:

DEPT: Procurement Services

Address Line 1: 99 Chieftan Way

Address Line 2: Dittmer Chemistry Lab

City: Tallahassee

State: FL

Zip Code: 32306

Country: United States

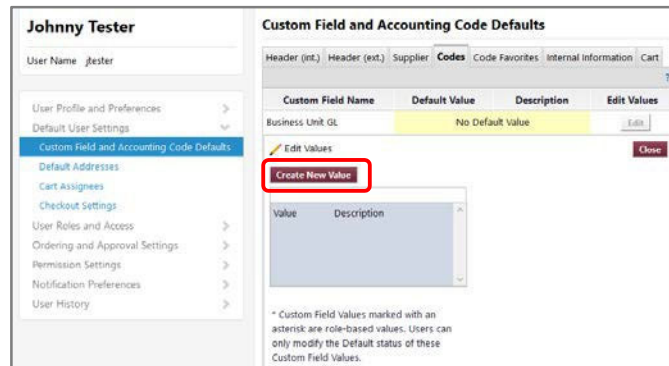
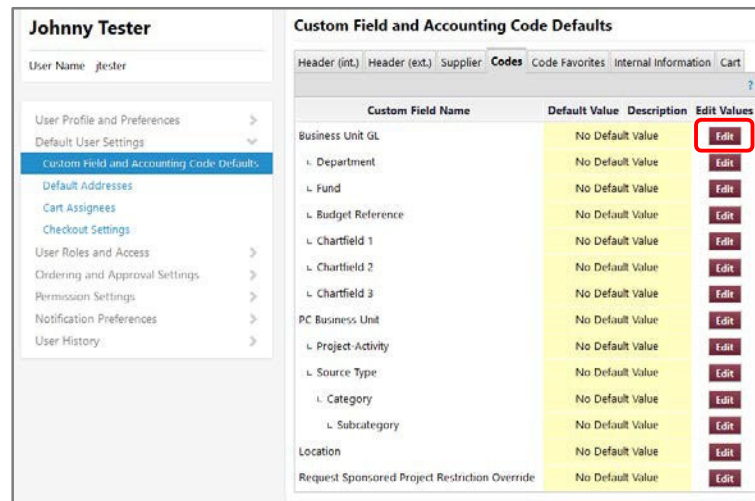
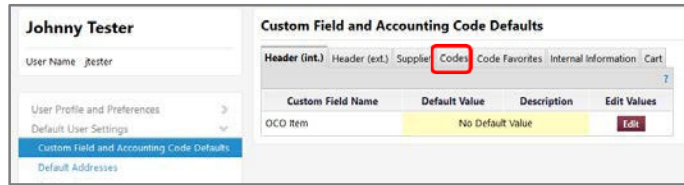
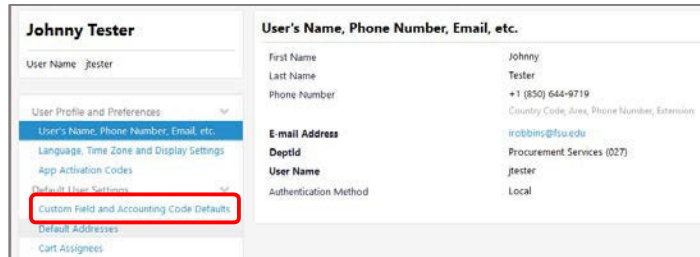
Save

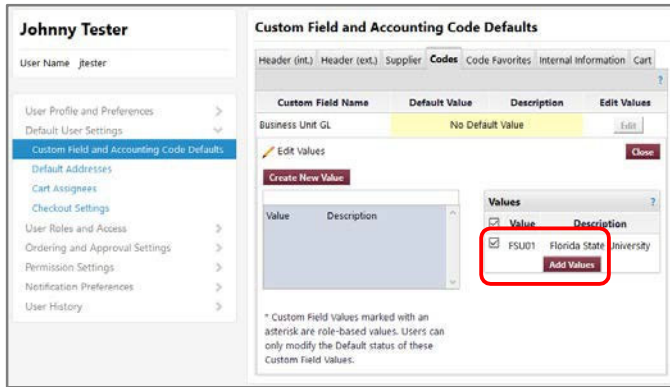
- You can add multiple Ship-to addresses to your profile at your discretion following the steps above.
- If you selected the Default Checkbox for an address, then it will show in **Bold** under your Shipping Address list

Setting Up Default Chart Fields

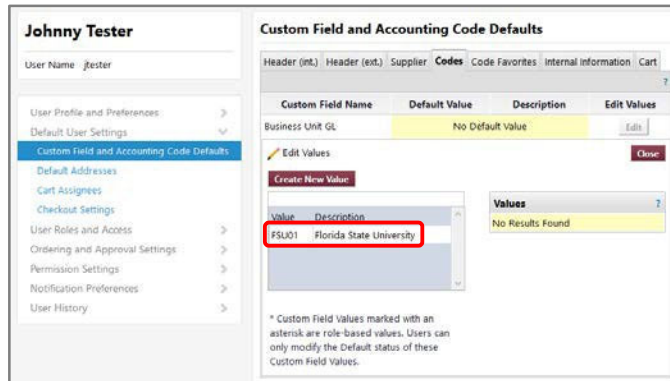


Click the **Codes** tab to set up and save default Chart Field values. (NOTE: you will always have the option to override your default Chart Field values for each requisition you create).

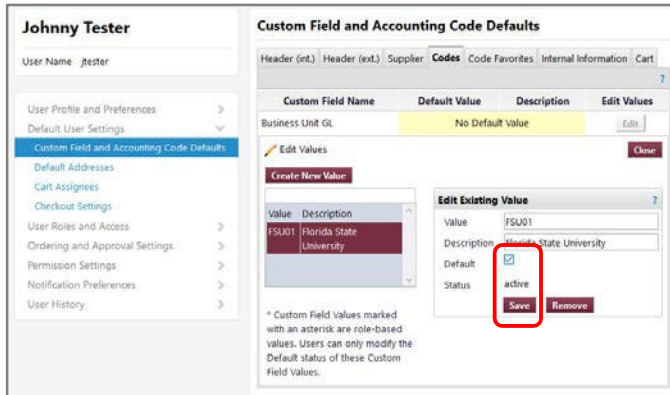




Click **FSU01** or **Florida State University**



Select the checkbox next to **Default** and click **Save**



Custom Field Name	Default Value	Description	Edit Values
Business Unit GL	FSU01	Florida State University	Edit
Department	No Default Value		Edit
Fund	No Default Value		Edit
Budget Reference	No Default Value		Edit
Chartfield 1	No Default Value		Edit
Chartfield 2	No Default Value		Edit
Chartfield 3	No Default Value		Edit
PC Business Unit	No Default Value		Edit
Project-Activity	No Default Value		Edit
Source Type	No Default Value		Edit
Category	No Default Value		Edit
Subcategory	No Default Value		Edit
Location	No Default Value		Edit
Request Sponsored Project Restriction Override	No Default Value		Edit

Johnny Tester

User Name *jtester*

User Profile and Preferences >
 Default User Settings >
Custom Field and Accounting Code Defaults
 Default Addresses >
 Cart Assignees >
 Checkout Settings >
 User Roles and Access >
 Ordering and Approval Settings >
 Permission Settings >
 Notification Preferences >
 User History >

Custom Field and Accounting Code Defaults

Header (int.) | Header (ext.) | Supplier | **Codes** | Code Favorites | Internal Information | Cart

Custom Field Name	Default Value	Description	Edit Values
Department	No Default Value		Edit

Business Unit GL: FSU01

Create New Value

Value	Description

* Custom Field Values marked with an asterisk are role-based values. Users can only modify the Default status of these Custom Field Values.

Johnny Tester

User Name *jtester*

User Profile and Preferences >
 Default User Settings >
Custom Field and Accounting Code Defaults
 Default Addresses >
 Cart Assignees >
 Checkout Settings >
 User Roles and Access >
 Ordering and Approval Settings >
 Permission Settings >
 Notification Preferences >
 User History >

Custom Field and Accounting Code Defaults

Header (int.) | Header (ext.) | Supplier | **Codes** | Code Favorites | Internal Information | Cart

Custom Field Name	Default Value	Description	Edit Values
Department	No Default Value		Edit

Business Unit GL: FSU01

Create New Value

Value	Description

Search For Value

Field Name: Department

Value:

Description:

Results Per Page: 5

Search

* Custom Field Values marked with an asterisk are role-based values. Users can only modify the Default status of these Custom Field Values.

- If you know the Department number, enter it in the **Value** field and click **Search**
- If you would rather search by department name, enter it in the **Description** field and click **Search**

Johnny Tester

User Name *jtester*

User Profile and Preferences >
 Default User Settings >
Custom Field and Accounting Code Defaults
 Default Addresses >
 Cart Assignees >
 Checkout Settings >
 User Roles and Access >
 Ordering and Approval Settings >
 Permission Settings >
 Notification Preferences >
 User History >

Custom Field and Accounting Code Defaults

Header (int.) | Header (ext.) | Supplier | **Codes** | Code Favorites | Internal Information | Cart

Custom Field Name	Default Value	Description	Edit Values
Department	No Default Value		Edit

Business Unit GL: FSU01

Create New Value

Value	Description

Results

Values Found: 4 | Page 1 of 1

Select	Value	Description
<input checked="" type="checkbox"/>	27000	Procurement Services
<input type="checkbox"/>	027001	Procurement Services Overhead
<input type="checkbox"/>	027002	Procurement Services ERP
<input type="checkbox"/>	033003	Procurement Services

Add Values | **Back to Search**

* Custom Field Values marked with an asterisk are role-based values. Users can only modify the Default status of these Custom Field Values.

- Select the **Checkbox** next to your Department
- Click **Add Values**

Johnny Tester

User Name *jtester*

User Profile and Preferences >
 Default User Settings >
Custom Field and Accounting Code Defaults
 Default Addresses >
 Cart Assignees >
 Checkout Settings >
 User Roles and Access >
 Ordering and Approval Settings >
 Permission Settings >
 Notification Preferences >
 User History >

Custom Field and Accounting Code Defaults

Header (int.) | Header (ext.) | Supplier | **Codes** | Code Favorites | Internal Information | Cart

Custom Field Name	Default Value	Description	Edit Values
Department	No Default Value		Edit

Business Unit GL: FSU01

Create New Value

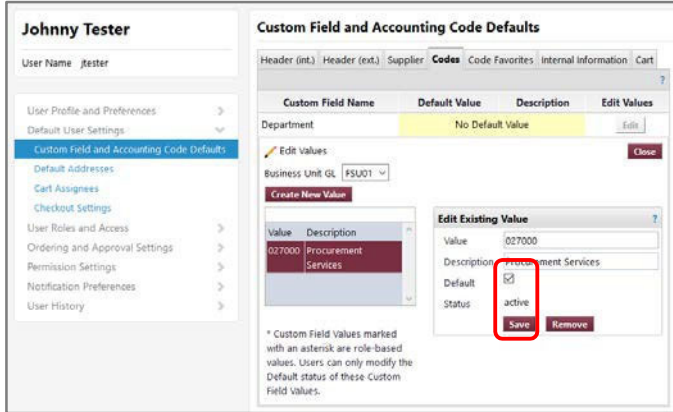
Value	Description
027000	Procurement Services

Results

Values Found: 3 | Page 1 of 1

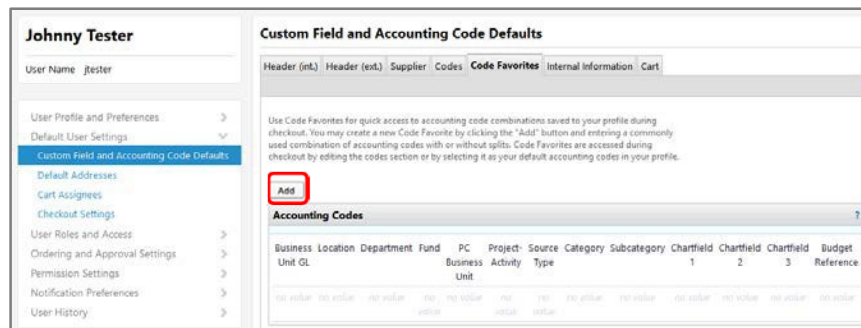
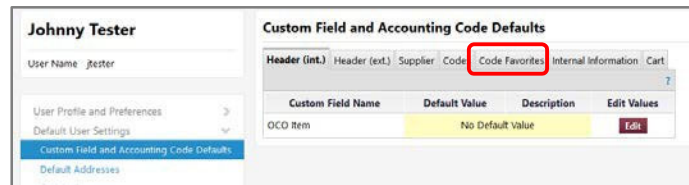
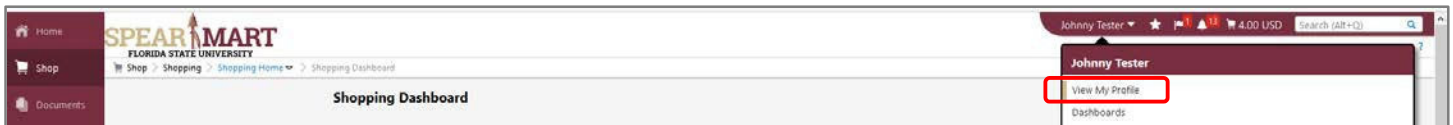
Select	Value	Description
<input checked="" type="checkbox"/>	027000	Procurement Services

Click your Department Number or Name



- Select the checkbox next to **Default** and click **Save**
- Click the **Codes** Tab
- Repeat the steps above to set your default values for your other Chart Field values

Setting Up Chart Field String Favorites



- Enter a **Nickname** field that will enable you to easily identify your Chart String for use later, for example, “E&G Budget” or “Grant ABC” etc.
- Enter the **Business Unit GL**. FSU01

00010214A
 Building Code Suite/Room Number

- Every office/room on campus has a unique **Location**. Facilities maintains the master [Building List](#) which includes all active buildings on campus. **Locations** have the format shown above.
- You can enter a partial value in the Value field (i.e. “0223”) and then click the Search button. This will bring up all Locations that start with 0223.
- You could also enter a phrase in the Description field (i.e. "Westcott") and then click the Search button. This will bring up all Locations that have the phrase "Westcott " in them.

Value	Description	Action
00010212F	WESTCOTT BUILDING0212F	select
00010212H	WESTCOTT BUILDING0212H	select
00010212J	WESTCOTT BUILDING0212J	select
00010212K	WESTCOTT BUILDING0212K	select
00010212L	WESTCOTT BUILDING0212L	select
00010212M	WESTCOTT BUILDING0212M	select
00010213	WESTCOTT BUILDING0213	select
00010214	WESTCOTT BUILDING0214	select
00010214A	WESTCOTT BUILDING0214A	select
00010214B	WESTCOTT BUILDING0214B	select
00010214C	WESTCOTT BUILDING0214C	select
00010214D	WESTCOTT BUILDING0214D	select
00010214G	WESTCOTT BUILDING0214G	select
00010214H	WESTCOTT BUILDING0214H	select
00010214W	WESTCOTT BUILDING0214W	select
00010215	WESTCOTT BUILDING0215	select
00010216	WESTCOTT BUILDING0216	select

HELPFUL TIP
 Entering your room number in the **Description** field may prove to be the quickest way to finding your **Location**.

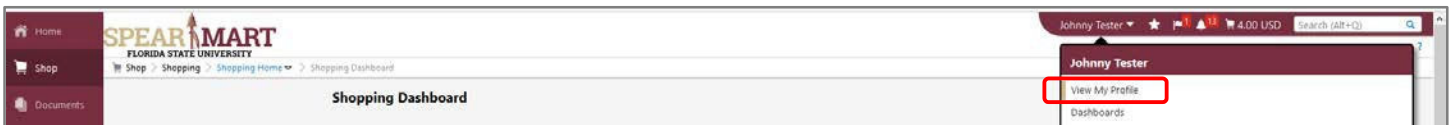
- Enter the remaining Chart Fields the same as above and click **Save** when complete.

Accounting Codes

Nickname	Business Unit GL	Location	Department	Fund	PC Business Unit	Project-Activity	Source Type	Category	Subcategory	Chartfield 1	Chartfield 2
FSU01		00010214A	027000	110							

Save **Cancel**

Setting Up Your Supervisor



Custom Field Name	Default Value	Description	Edit Values
Request Budget Override	No Default Value		Edit
Supervisors	No Default Value		Edit

Custom Field Name	Default Value	Description	Edit Values
Request Budget Override	No Default Value		Edit
Supervisors	No Default Value		Edit

Johnny Tester
User Name jtester

User Profile and Preferences >
Default User Settings >
Custom Field and Accounting Code Defaults
Default Addresses >
Cart Assignees >
Checkout Settings >
User Roles and Access >
Ordering and Approval Settings >
Permission Settings >
Notification Preferences >
User History >

Custom Field and Accounting Code Defaults
Header (int.) Header (ext.) Supplier Codes Code Favorites Internal Information Cart

Custom Field Name	Default Value	Description	Edit Values
Supervisors	No Default Value		Edit

Edit Values Close

Create New Value

Value	Description

* Custom Field Values marked with an asterisk are role-based values. Users can only modify the Default status of these Custom Field Values.

- Enter your Supervisor's First and Last Name in the **Description** field. You could also just enter the Last Name.

Johnny Tester
User Name jtester

User Profile and Preferences >
Default User Settings >
Custom Field and Accounting Code Defaults
Default Addresses >
Cart Assignees >
Checkout Settings >
User Roles and Access >
Ordering and Approval Settings >
Permission Settings >
Notification Preferences >
User History >

Custom Field and Accounting Code Defaults
Header (int.) Header (ext.) Supplier Codes Code Favorites Internal Information Cart

Custom Field Name	Default Value	Description	Edit Values
Supervisors	No Default Value		Edit

Edit Values Close

Create New Value

Value	Description

Search For Value

Field Name Supervisors

Value

Description

Results Per Page 5

Search

* Custom Field Values marked with an asterisk are role-based values. Users can only modify the Default status of these Custom Field Values.

Johnny Tester
User Name jtester

User Profile and Preferences >
Default User Settings >
Custom Field and Accounting Code Defaults
Default Addresses >
Cart Assignees >
Checkout Settings >
User Roles and Access >
Ordering and Approval Settings >
Permission Settings >
Notification Preferences >
User History >

Custom Field and Accounting Code Defaults
Header (int.) Header (ext.) Supplier Codes Code Favorites Internal Information Cart

Custom Field Name	Default Value	Description	Edit Values
Supervisors	No Default Value		Edit

Edit Values Close

Create New Value

Value	Description

Results Found 1 Page 1 of 1

Select	Value	Description
<input type="checkbox"/>	ian Robbins	ian Robbins

Add Value Back to Search

* Custom Field Values marked with an asterisk are role-based values. Users can only modify the Default status of these Custom Field Values.

Johnny Tester
User Name jtester

User Profile and Preferences >
Default User Settings >
Custom Field and Accounting Code Defaults
Default Addresses >
Cart Assignees >
Checkout Settings >
User Roles and Access >
Ordering and Approval Settings >
Permission Settings >
Notification Preferences >
User History >

Custom Field and Accounting Code Defaults
Header (int.) Header (ext.) Supplier Codes Code Favorites Internal Information Cart

Custom Field Name	Default Value	Description	Edit Values
Supervisors	No Default Value		Edit

Edit Values Close

Create New Value

Value	Description
ian Robbins	ian Robbins

Search For Value

Field Name Supervisors

Value

Description

Results Per Page 5

Search

No Results Found

* Custom Field Values marked with an asterisk are role-based values. Users can only modify the Default status of these Custom Field Values.

Johnny Tester

User Name jtester

- User Profile and Preferences
- Default User Settings
- Custom Field and Accounting Code Defaults**
- Default Addresses
- Cart Assignees
- Checkout Settings
- User Roles and Access
- Ordering and Approval Settings
- Permission Settings
- Notification Preferences
- User History

Custom Field and Accounting Code Defaults

Header (int.) Header (ext.) Supplier Codes Code Favorites **Internal Information** Cart

Custom Field Name	Default Value	Description	Edit Values
Supervisors	IROBBINS	Ian Robbins	Edit

[Edit Values](#) [Close](#)

[Create New Value](#)

Value	Description
IROBBINS	Ian Robbins

Edit Existing Value

Value

Description

Default

Status active

[Save](#) [Remove](#)

* Custom Field Values marked with an asterisk are role-based values. Users can only modify the Default status of these Custom Field Values.

Setting Up Your Notification Preferences

We caution you from making any changes to your notification preferences. We have configured the system so that you will be adequately informed on the progress of your requisitions, purchase orders etc. If you feel like you are receiving too many notifications, you can throttle them back by making adjustments within your profile.

The screenshot shows the top navigation bar of the SpearMart system. On the right side, a dropdown menu is open for the user 'Johnny Tester'. The option 'View My Profile' is highlighted with a red rectangular box.

Johnny Tester

User Name jtester

- User Profile and Preferences
- User's Name, Phone Number, Email, etc.**
- Language, Time Zone and Display Settings
- App Activation Codes
- Default User Settings
- User Roles and Access
- Ordering and Approval Settings
- Permission Settings
- Notification Preferences**
- User History

User's Name, Phone Number, Email, etc.

First Name Johnny

Last Name Tester

Phone Number +1 (850) 644-9719

Country Code, Area, Phone Number, Extension

E-mail Address irobbs@fsu.edu

DeptId Procurement Services (027)

User Name jtester

Authentication Method Local

Johnny Tester

User Name jtester

- User Profile and Preferences
- User's Name, Phone Number, Email, etc.**
- Language, Time Zone and Display Settings
- App Activation Codes
- Default User Settings
- User Roles and Access
- Ordering and Approval Settings
- Permission Settings
- Notification Preferences
- Administration & Integration
- Shopping, Carts & Requisitions**
- Purchase Orders
- Accounts Payable
- Contracts
- Sourcing Director
- Form Requests
- User History

User's Name, Phone Number, Email, etc.

First Name Johnny

Last Name Tester

Phone Number +1 (850) 644-9719

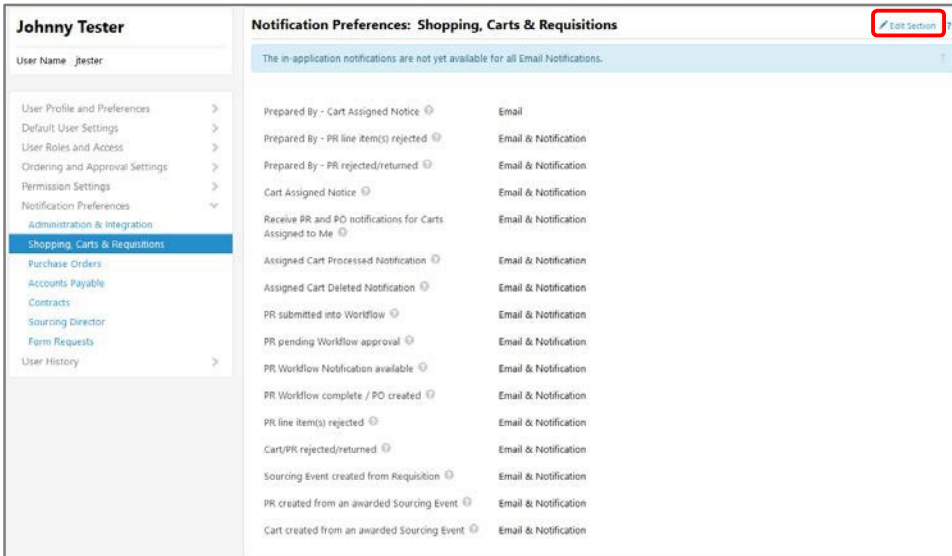
Country Code, Area, Phone Number, Extension

E-mail Address irobbs@fsu.edu

DeptId Procurement Services (027)

User Name jtester

Authentication Method Local

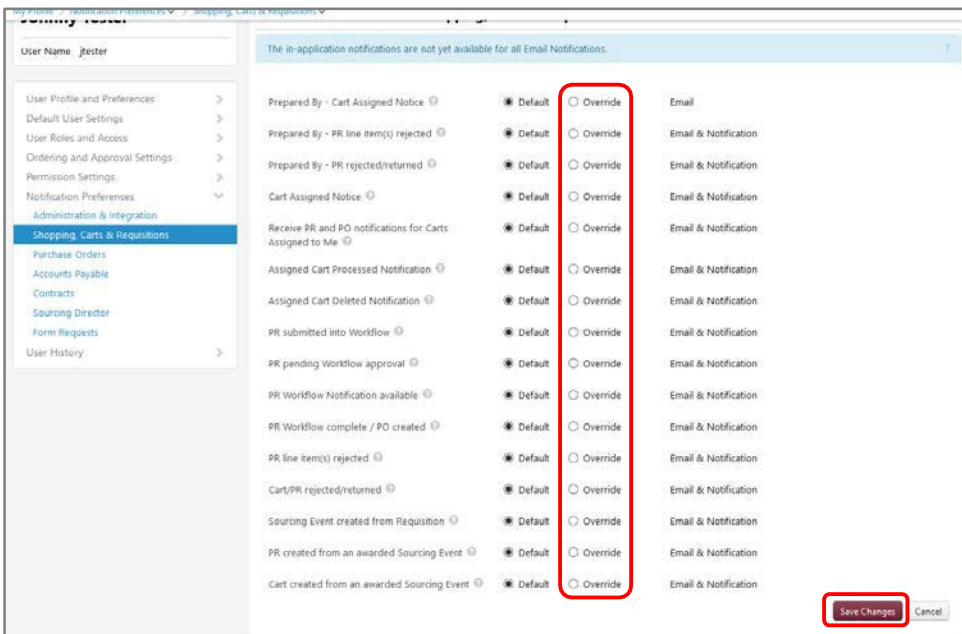


Johnny Tester
User Name: jtester

Notification Preferences: Shopping, Carts & Requisitions Edit Section ?

The in-application notifications are not yet available for all Email Notifications.

Prepared By - Cart Assigned Notice	Default	Email
Prepared By - PR line item(s) rejected	Default	Email & Notification
Prepared By - PR rejected/returned	Default	Email & Notification
Cart Assigned Notice	Default	Email & Notification
Receive PR and PO notifications for Carts Assigned to Me	Default	Email & Notification
Assigned Cart Processed Notification	Default	Email & Notification
Assigned Cart Deleted Notification	Default	Email & Notification
PR submitted into Workflow	Default	Email & Notification
PR pending Workflow approval	Default	Email & Notification
PR Workflow Notification available	Default	Email & Notification
PR Workflow complete / PO created	Default	Email & Notification
PR line item(s) rejected	Default	Email & Notification
Cart/PR rejected/returned	Default	Email & Notification
Sourcing Event created from Requisition	Default	Email & Notification
PR created from an awarded Sourcing Event	Default	Email & Notification
Cart created from an awarded Sourcing Event	Default	Email & Notification



Johnny Tester
User Name: jtester

Notification Preferences: Shopping, Carts & Requisitions

The in-application notifications are not yet available for all Email Notifications.

Prepared By - Cart Assigned Notice	<input checked="" type="radio"/> Default <input type="radio"/> Override	Email
Prepared By - PR line item(s) rejected	<input checked="" type="radio"/> Default <input type="radio"/> Override	Email & Notification
Prepared By - PR rejected/returned	<input checked="" type="radio"/> Default <input type="radio"/> Override	Email & Notification
Cart Assigned Notice	<input checked="" type="radio"/> Default <input type="radio"/> Override	Email & Notification
Receive PR and PO notifications for Carts Assigned to Me	<input checked="" type="radio"/> Default <input type="radio"/> Override	Email & Notification
Assigned Cart Processed Notification	<input checked="" type="radio"/> Default <input type="radio"/> Override	Email & Notification
Assigned Cart Deleted Notification	<input checked="" type="radio"/> Default <input type="radio"/> Override	Email & Notification
PR submitted into Workflow	<input checked="" type="radio"/> Default <input type="radio"/> Override	Email & Notification
PR pending Workflow approval	<input checked="" type="radio"/> Default <input type="radio"/> Override	Email & Notification
PR Workflow Notification available	<input checked="" type="radio"/> Default <input type="radio"/> Override	Email & Notification
PR Workflow complete / PO created	<input checked="" type="radio"/> Default <input type="radio"/> Override	Email & Notification
PR line item(s) rejected	<input checked="" type="radio"/> Default <input type="radio"/> Override	Email & Notification
Cart/PR rejected/returned	<input checked="" type="radio"/> Default <input type="radio"/> Override	Email & Notification
Sourcing Event created from Requisition	<input checked="" type="radio"/> Default <input type="radio"/> Override	Email & Notification
PR created from an awarded Sourcing Event	<input checked="" type="radio"/> Default <input type="radio"/> Override	Email & Notification
Cart created from an awarded Sourcing Event	<input checked="" type="radio"/> Default <input type="radio"/> Override	Email & Notification

Save Changes Cancel

- Select the **Override** radio button for the notification you wish to select.
- Then select from the available dropdown action menu.
- Click **Save Changes** when complete



Congratulations! You have now successfully set up your profile.