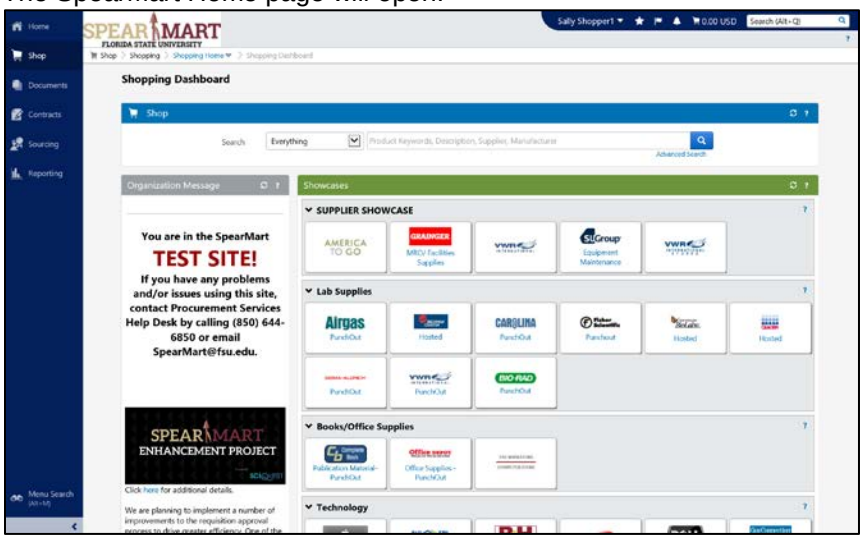
SPEAR MART
FLORIDA STATE UNIVERSITY

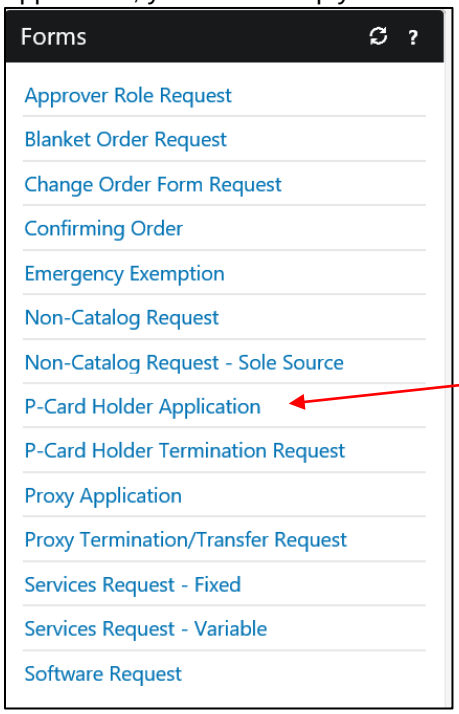
JOB AID
Submitting a P-Card Holder or Proxy Application

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:

The SpearMart Home page will open.



To submit a P-Card Holder or Proxy Application, scroll down on the page to find the list of Forms which are found under the catalog icons. For this example, a P-Card Holder Application needs to be submitted for a new employee in the office. Therefore, the P-Card Holder Application is selected. The tasks outlined in this Job Aid are the same for the Proxy Application, you would simply select that form to become a Proxy.



Select the "**P-Card Holder Application**" Form by clicking on the name of the form.

The form will open.

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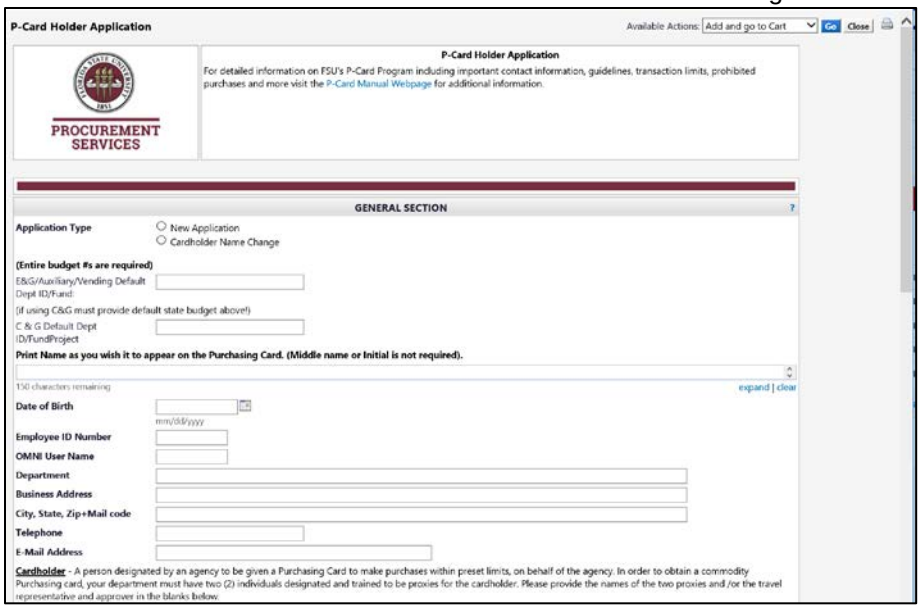
Fill in all the required information. Any item with the title in **bold** means it is required. You cannot submit the form until this is done.

Click to select if the form is for a new Cardholder or a name change for an existing one.

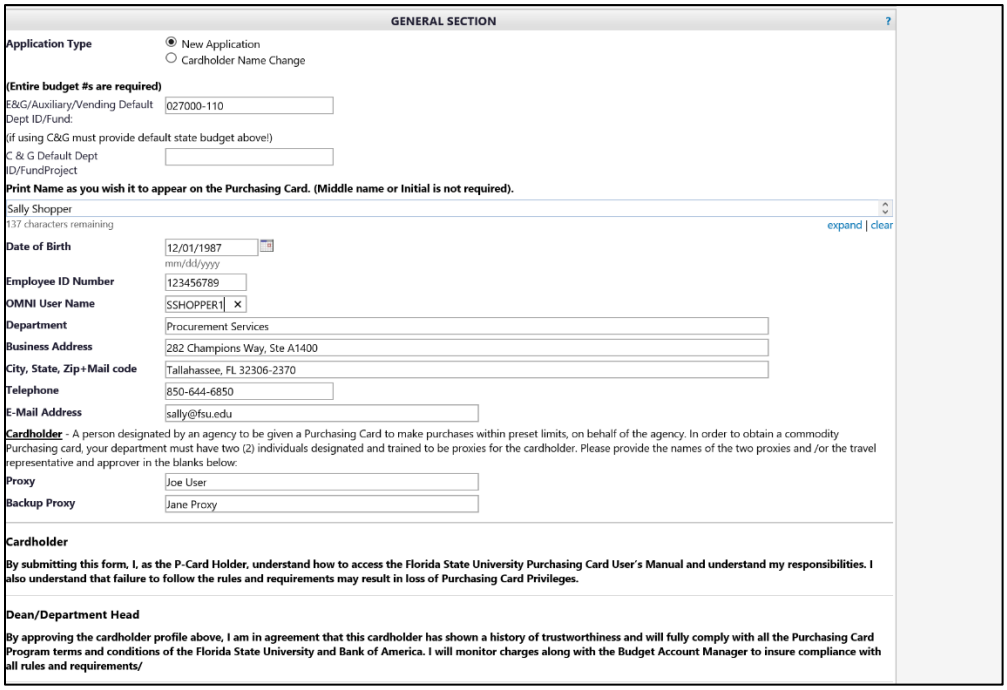


Enter the Default Department ID and Fund to be used on the card.

Note: Typically C&G budgets cannot be used as the defaults and special authorization from the Sponsored Research Specialist must be obtained prior to allowing this. You must also provide an E&G or auxiliary budget as a backup if a C&G budget is desired.

Enter the applicant's name, birth date, employee ID number, OMNI User Name, Department, Business Address, City, State, Zip and Mail Code, Telephone (must be the FSU phone number) and FSU email address in the appropriate fields.

Note: Yahoo, Google, AOL or other non-FSU email addresses are not acceptable.



Once completed, review the certification statement for the Cardholder. By submitting this form, you are agreeing to the

statement listed. When the approvers approve their step of this form process, they are agreeing to the statement that pertains to them as well.

Cardholder

By submitting this form, I, as the P-Card Holder, understand how to access the Florida State University Purchasing Card User's Manual and understand my responsibilities. I also understand that failure to follow the rules and requirements may result in loss of Purchasing Card Privileges.

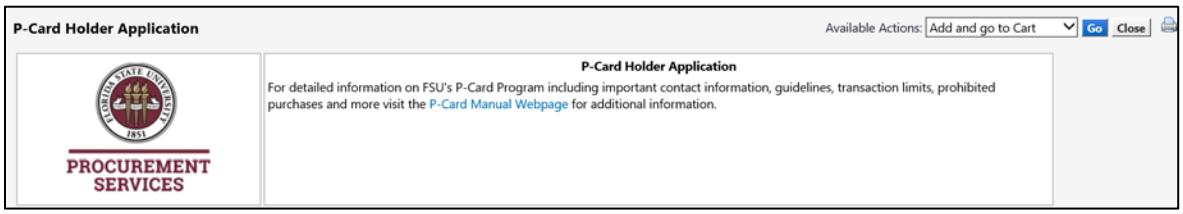
Dean/Department Head

By approving the cardholder profile above, I am in agreement that this cardholder has shown a history of trustworthiness and will fully comply with all the Purchasing Card Program terms and conditions of the Florida State University and Bank of America. I will monitor charges along with the Budget Account Manager to insure compliance with all rules and requirements/

Budget Account Manager

By Approving this form, I also acknowledge that The Florida State University VISA Purchasing Card is issued in the individual's name as listed above, and the Purchasing card utilizes unencumbered money. I am in agreement that this cardholder has shown a history of trustworthiness and will fully comply with all the Purchasing Card Program terms and conditions of the Florida State University and Bank of America. I will monitor charges along with the Supervisor and Dean or Department Head to insure compliance with all rules and requirements.

Scroll to the top of the form and ensure that "Add and go to Cart" is in the Available Action field, then click "Go".

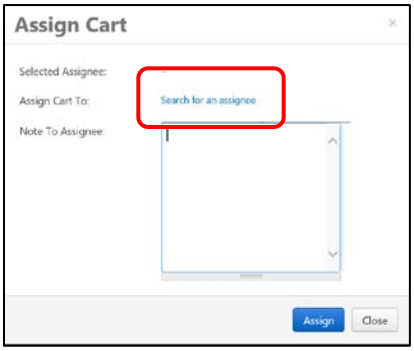


Your application will be placed in a shopping cart.

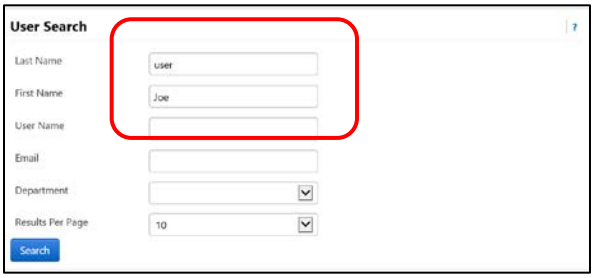
Once back in the shopping cart, there are two choices. You can either assign the cart to your Requester or proceed to checkout if you know the accounting codes to enter. Both are outlined below.

Click "Assign Cart"

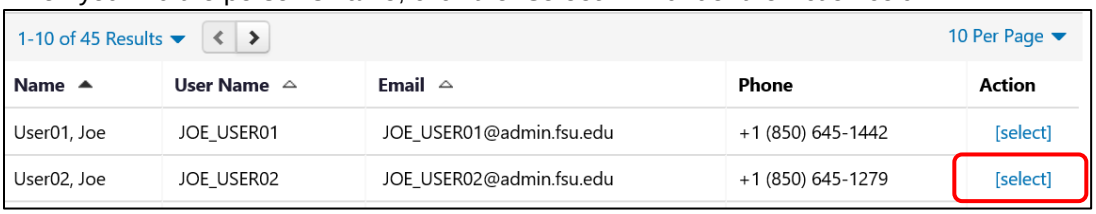
1. **Assign Cart:** Once you click "**Assign Cart**", the below page will show up.



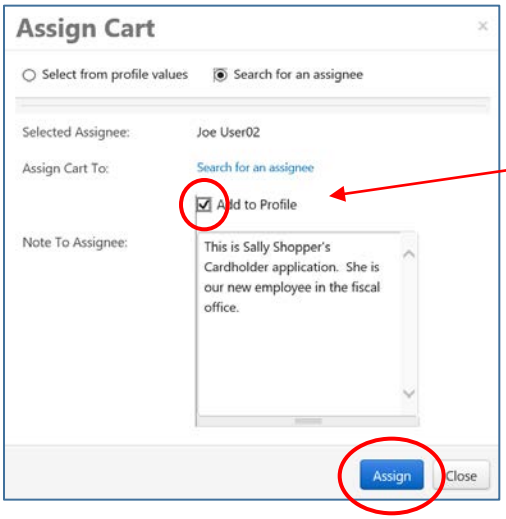
Click "**Search for an Assignee**" to find your Requester in your department to assign the cart to. Enter their first and last name in the "User Search" below.



When you find the person's name, click the "**select**" link under the Action column.

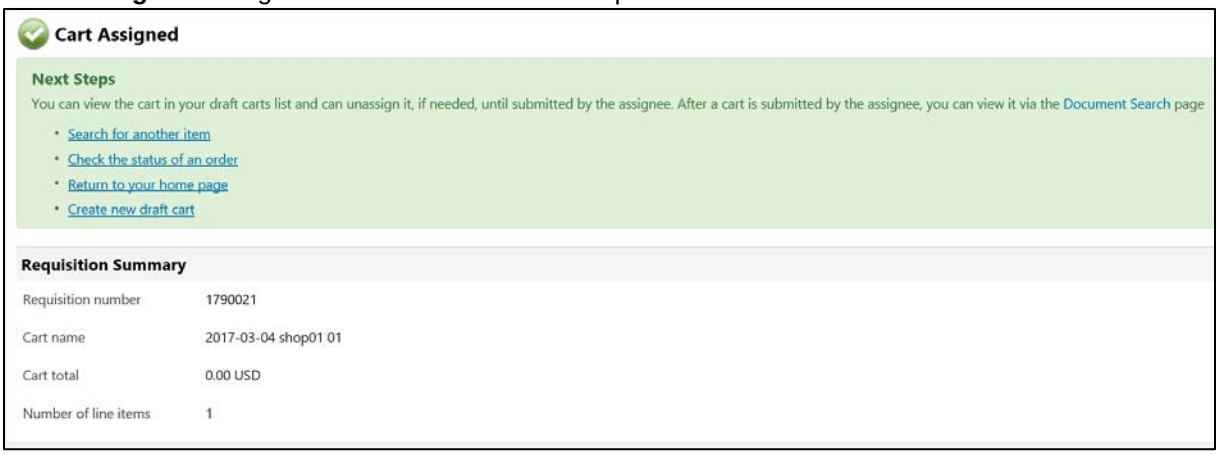


Enter a note for the Requester as needed to let them know this is Sally's P-Card application. You can also click the "Add to Profile" box to save this Requester so you can search from your profile going forward.



Click "Add to Profile" to save this assignee. Next time you want to assign a cart, they will be saved in your profile.

Click "**Assign**" to assign the cart to the selected Requester.



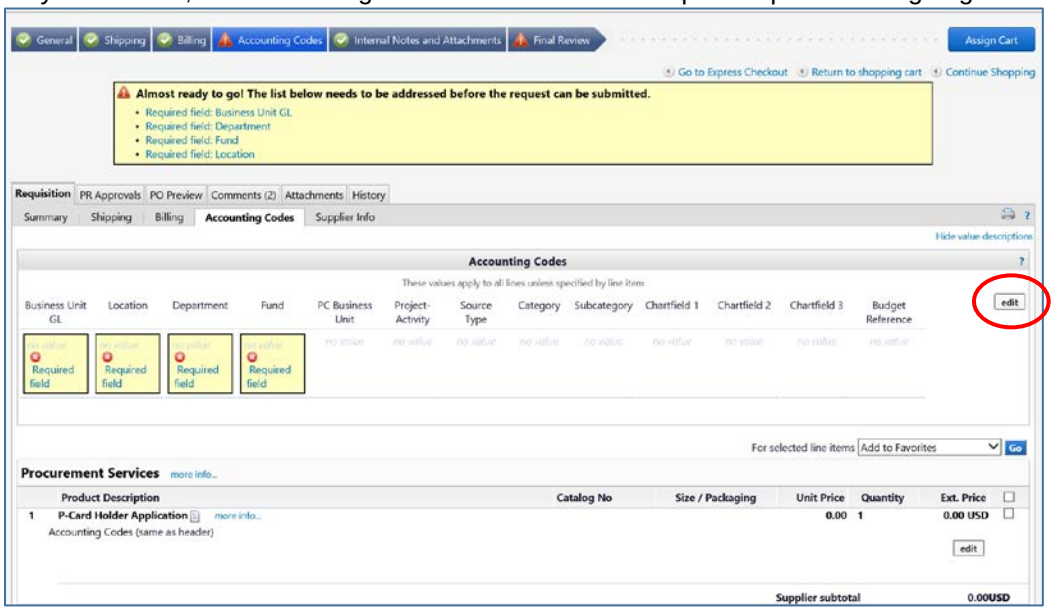
You have successfully assigned your cart to a department Requester!

"Proceed to Checkout" is the other option is to enter the accounting data for your Requesters and the Shopper can

enter the requisition data and then assign the cart to their Requester.

2. **Proceed to Checkout:** Once you click "**Proceed to Checkout**", the below page will show up. You can now enter the budget and shipping information.

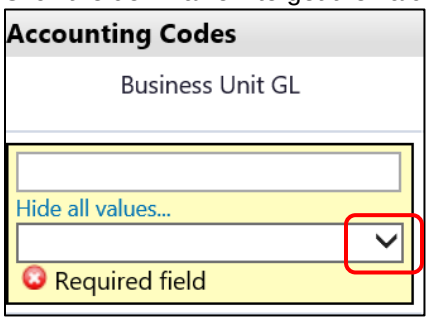
As you can see, the accounting codes area needs to be updated prior to assigning the cart.



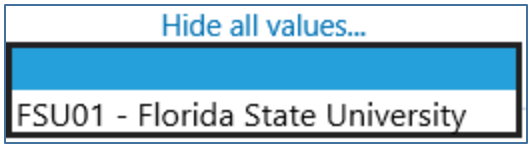
As you can see above, the "Accounting Codes" tab has a red exclamation mark, which means it is information must be updated before submitting. Click the "Accounting Codes" tab. To update the Accounting Codes, click the "**edit**" button.

The first field is the "Business Unit GL". Click the "**Select from all values**" link.

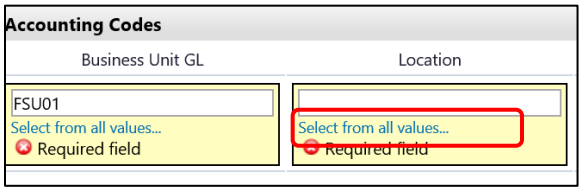
Click the down arrow to get the value "FSU01".



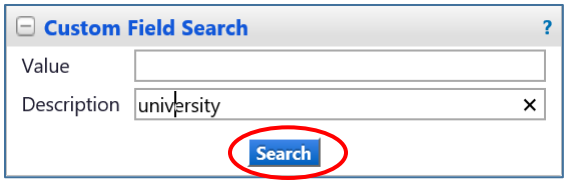
The drop down menu will have only one value to select. Select "FSU01" and it will populate the field.



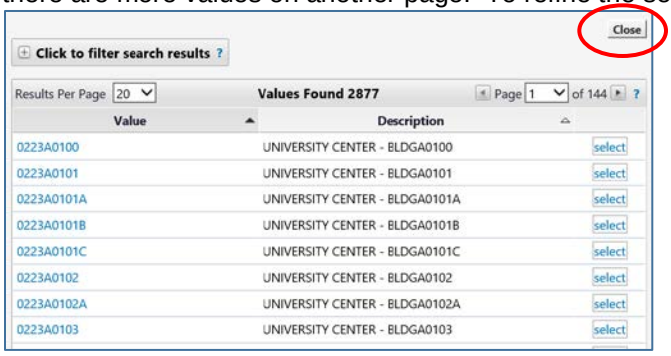
The next item is Location. Click "**Select from all values**".



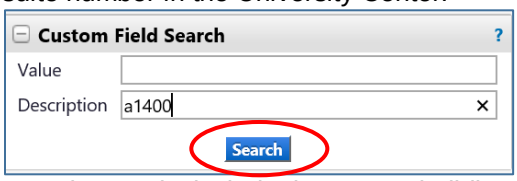
Enter part of the building name. For this example, "university" was entered because Procurement is located in University Center A.



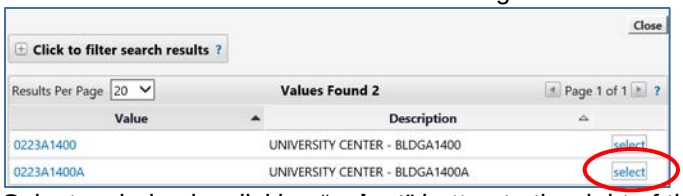
All locations with the search description used will come up as choices. When the list comes up, select the appropriate department code by clicking the "**select**" button. In this example, our suite, "A1400" is too far down the list. Note that there are more values on another page. To refine the search, click the "Close" button.



To narrow down the search, you can enter more details. In this example, "a1400" is entered since that is Procurement's suite number in the University Center.



Now the results include the correct building and suite number.

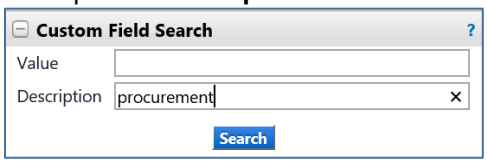


Select a choice by clicking "**select**" button to the right of the location. The system will take you back to the page and populated the field.

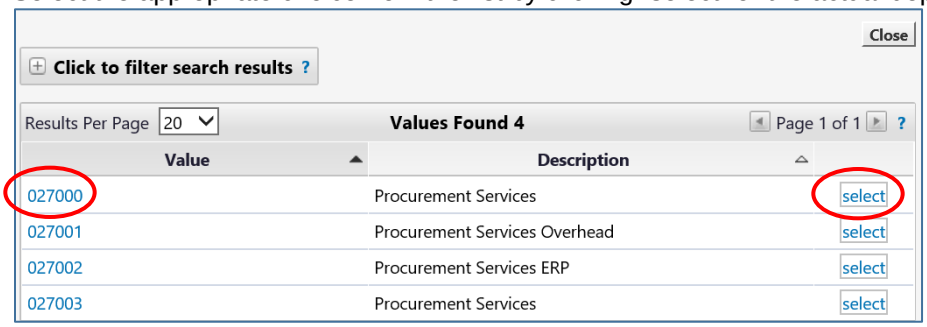
Note: The Location must be a code that does not begin with an "S". Those are ship to codes, but will still come up in a search at times.

The next step is to enter the Department ID. You can enter the department number or as in this example, enter a partial

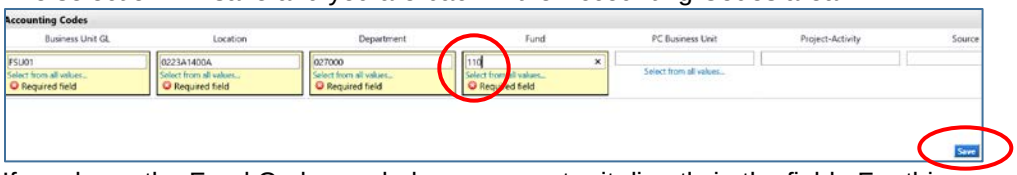
description. Below "**procurement**" was entered. Click "**Search**".



Select the appropriate choice from the list by clicking "select" or the actual department number.



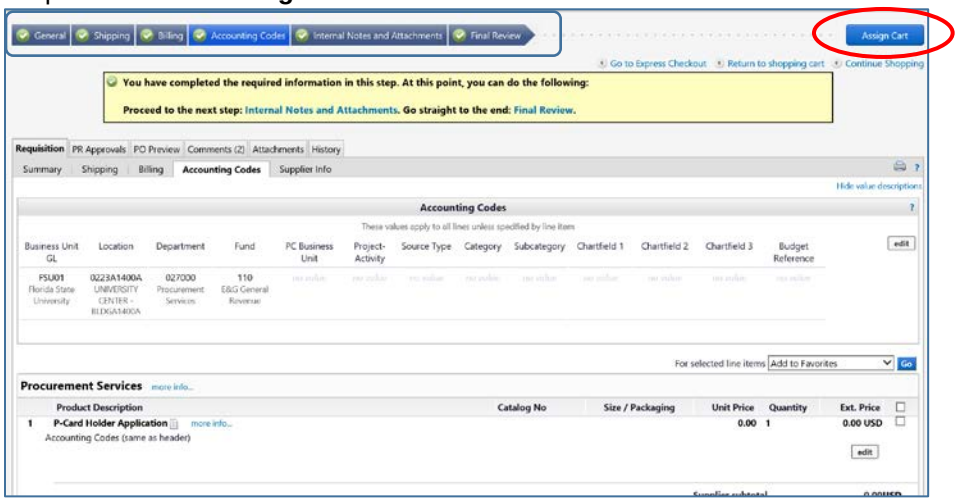
The selection will save and you are back in the Accounting Codes area.



If you know the Fund Code needed, you can enter it directly in the field. For this example, the correct fund "110" was entered directly.

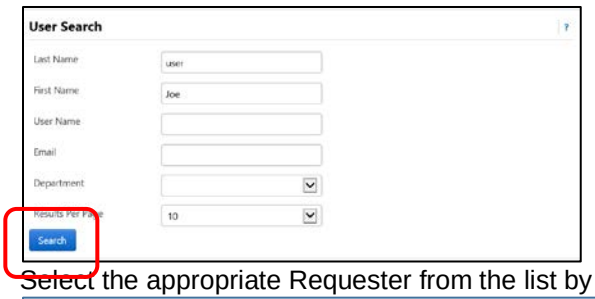
It will populate the field. If you are using a project, you will have to continue this process for the PC Business Unit, Project-Activity, and additional chartfields as required. Click "**Save**" when you have completed the accounting codes.

The full string will now be visible and all the top tabs have green checkmarks, so the requisition can be assigned to your Requester. Click "**Assign Cart**".

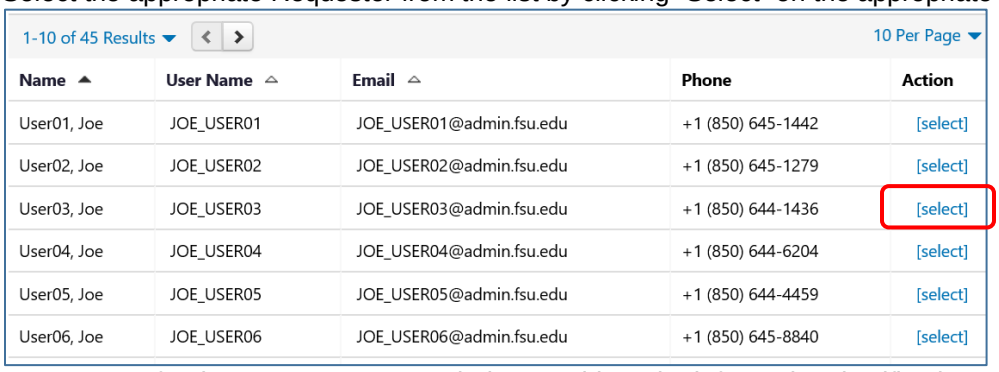


The below box will open and click "**search for an assignee**".

Click "**Search for an Assignee**" to find your Requester in your department to assign the cart to. Enter their first and last name in the "User Search" below.

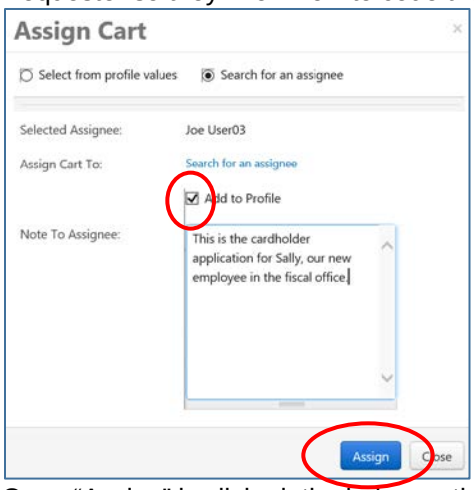


Select the appropriate Requester from the list by clicking "Select" on the appropriate line.

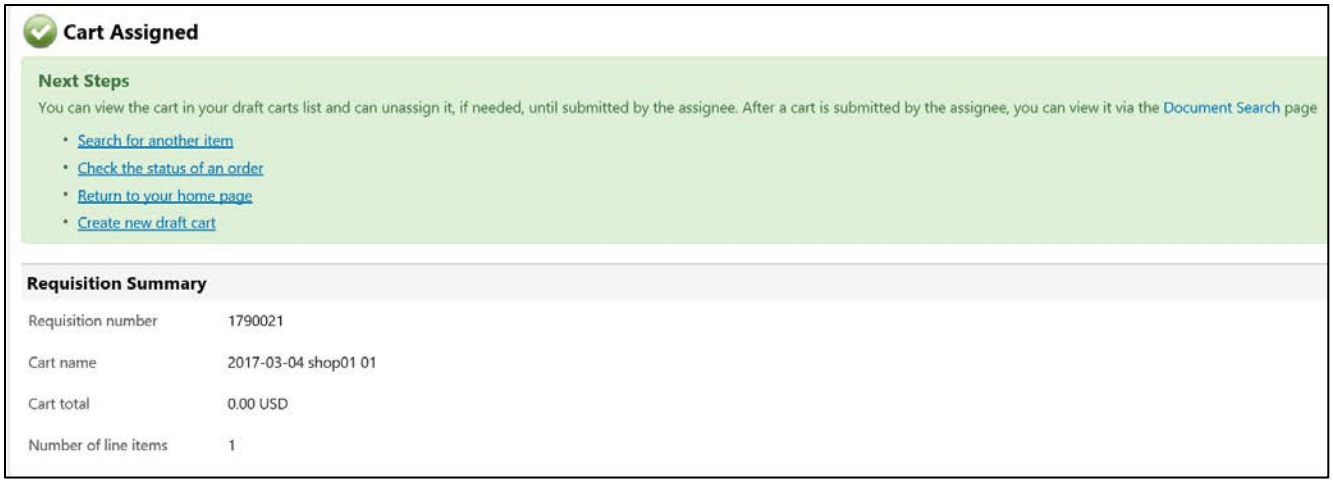


Name	User Name	Email	Phone	Action
User01, Joe	JOE_USER01	JOE_USER01@admin.fsu.edu	+1 (850) 645-1442	[select]
User02, Joe	JOE_USER02	JOE_USER02@admin.fsu.edu	+1 (850) 645-1279	[select]
User03, Joe	JOE_USER03	JOE_USER03@admin.fsu.edu	+1 (850) 644-1436	[select]
User04, Joe	JOE_USER04	JOE_USER04@admin.fsu.edu	+1 (850) 644-6204	[select]
User05, Joe	JOE_USER05	JOE_USER05@admin.fsu.edu	+1 (850) 644-4459	[select]
User06, Joe	JOE_USER06	JOE_USER06@admin.fsu.edu	+1 (850) 645-8840	[select]

Enter a note for the Requester as needed to provide order information, justification, or budget information to the Requester so they know how to code the requisition.

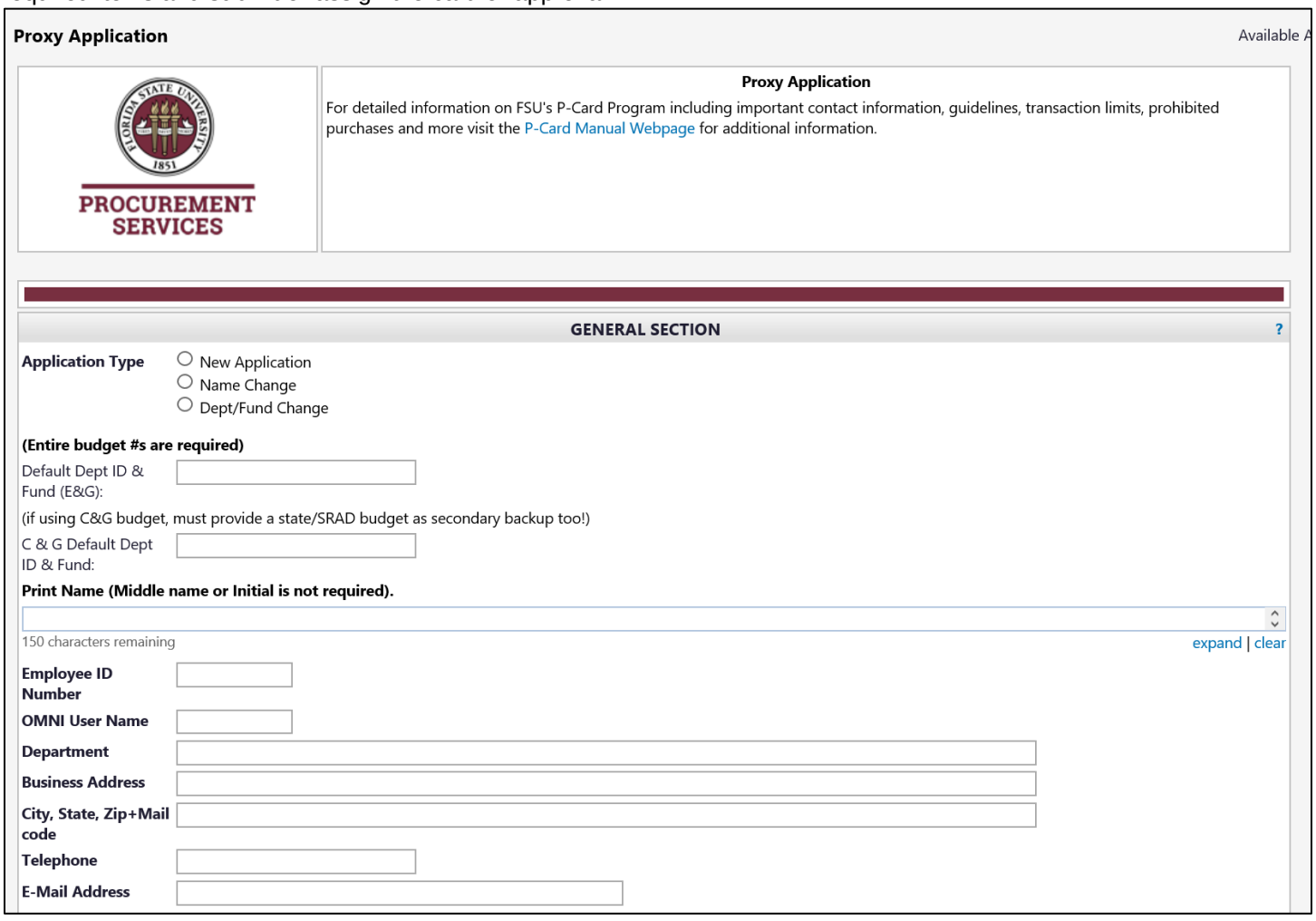


Once "Assign" is clicked, the below notice will come up with a requisition number



You have successfully assigned your cart!

Below is a picture of the Proxy Application. The instructions are the same as for the Cardholder application. Fill in the required items and submit or assign the cart for approval.



When submitting, assigning, or approving, the individuals are certifying to the below statements on the Proxy application form:

JOB AID
Submitting a P-Card Holder or Proxy Application

Proxy is a person who is responsible for coding the information on the charges the Cardholder makes using his/her purchasing card. Proxies must have access to the OMNI system. The Proxy is required to ensure charges are coded within the four (4) days as required. A second Proxy must be designated to perform these duties in the case of absence of the primary Proxy. **If you are the Primary Proxy, provide the name of your Backup. If you are designated as a Backup Proxy, provide the name of the person you will be backing up.**

- ○ Proxy
- ○ Backup Proxy

Name

Proxy/BackUp Proxy

By submitting this form, I am in agreement that I will fully comply with all the Purchasing Card Program terms and conditions of the Florida State University and Bank of America.

Dean/Department Head

By approving this form, I am in agreement that the Proxy designated above is responsible to log/ review and reconcile all departmental charges procured with the Florida State University VISA Purchasing Card. This individual is aware of acceptable purchases within the Authorized Budget(s), and will fully comply with all the Purchasing Card Program terms and conditions of the Florida State University and the Bank of America.

Budget Account Manager

By Approving this form, I acknowledge that Florida State University VISA Purchasing Card has been issued to individual(s) within this department, and the Purchasing card utilizes unencumbered money.

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