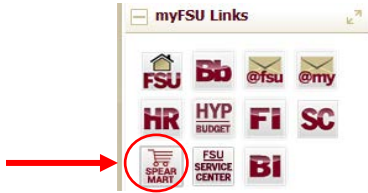


Overview

You will receive an email notification when a requisition has been submitted for any budget or category that you are set up to approve. There are two ways you can approve the requisition.

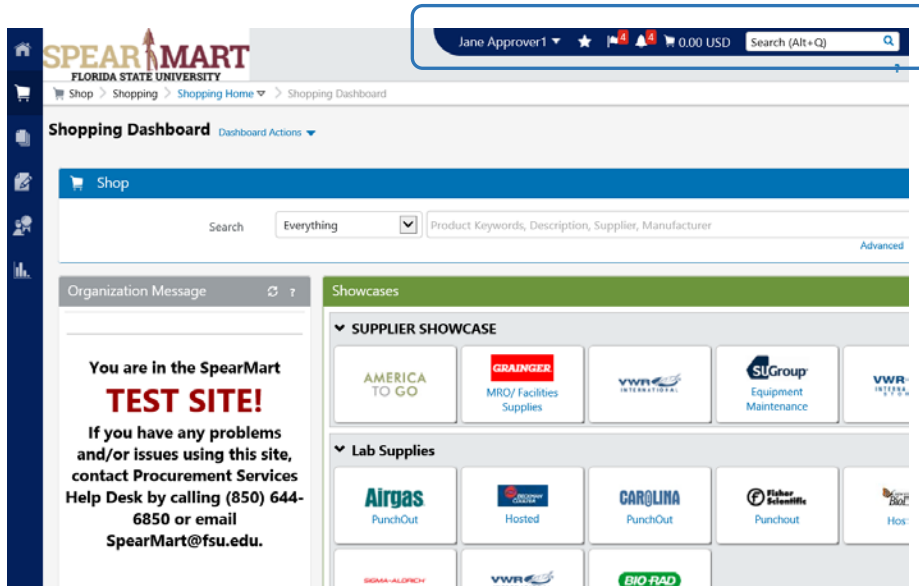
1. Go into SpearMart to approve.
2. Approve via the notification email. You must set up a code in your User Profile prior to being able to approve via this method.

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:



Method 1: SpearMart approvals

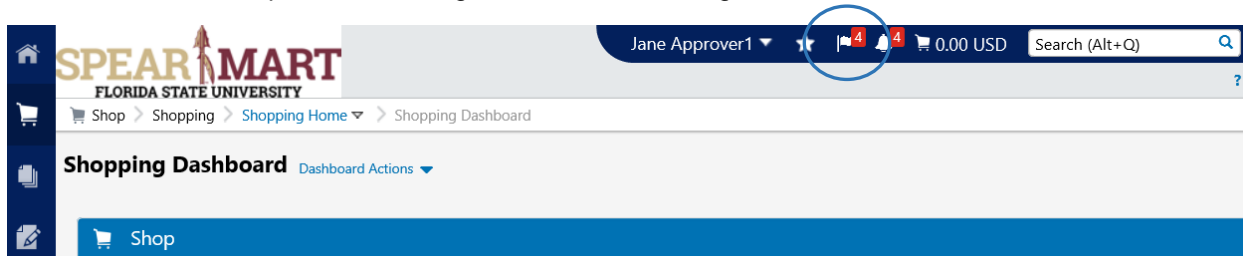
You will be sent to the SpearMart Home page.



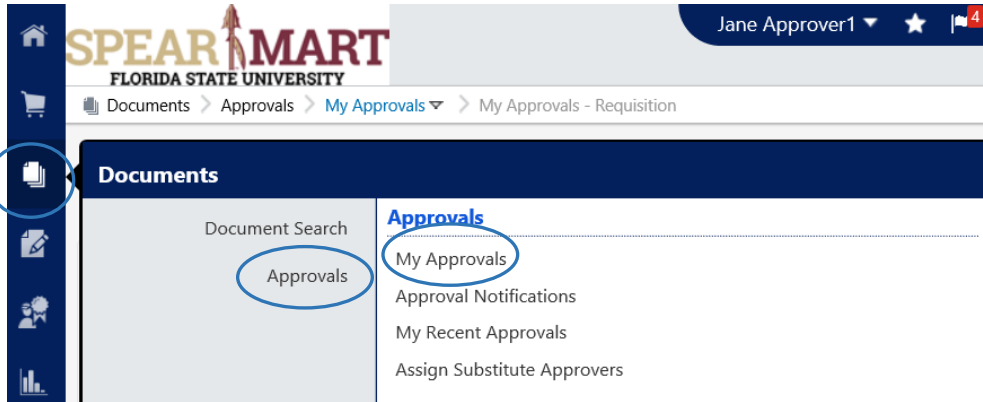
There are several FSU ways you can get to requisitions that are pending your approval. The first method is at the very top of the page. There are notification flags and a notification bell.

1. Click the notification flag to get the notifications OR click the **"My approvals"** link OR the click the left side Documents search menu, then click **"Approvals"**.

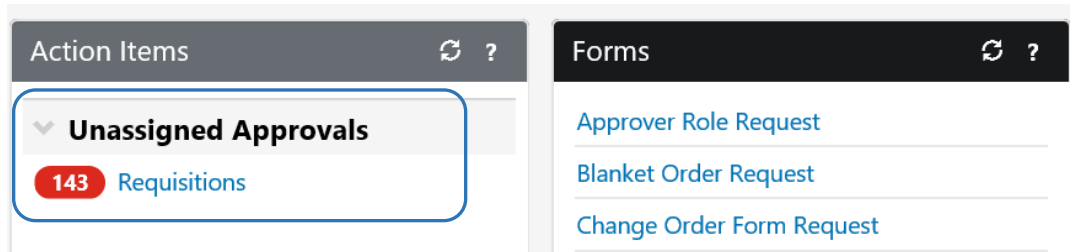
a. View of top notification flag method. Click the flag as shown below.



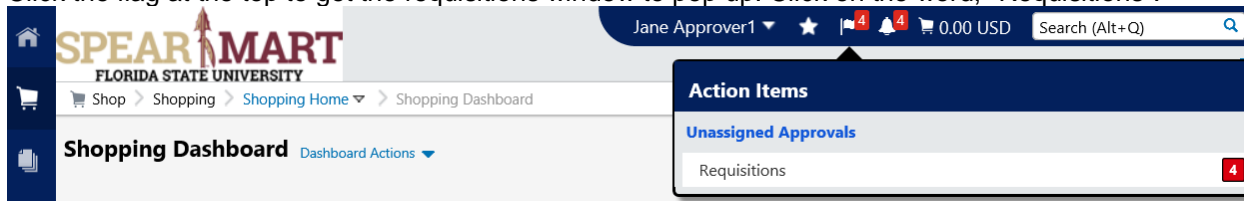
b. View of left Document Search method. If you click on **"Approval Notifications"**, you will get to the same place to select a requisition to approve.



- c. On the bottom of the Shopping Home page, under the **“Action Items”** widget, click on Unassigned Approvals since this particular Approver is in a pool where other Approvers are in the pool.

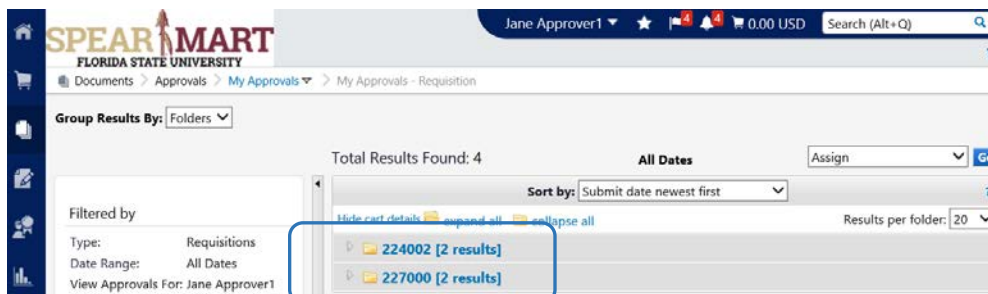


For this example, the top notification flag is selected. Click the flag at the top to get the requisitions window to pop up. Click on the word, "Requisitions".



Folders will pop up as shown below. Click the arrow to open the folder. If you are one of several approvers that approve for the department, you are seeing the same requisitions as other approvers set up for the Dept ID or Project identified in the folder name.

This example shows this approver having two folders where they are an assigned approver.



If you have more than one folder, click the arrow to the left of the folder name and a list will open up with all the requisitions pending approval at your level.

Group Results By: Folders

Total Results Found: 4

Sort by: Submit date newest first

Filtered by

- Type: Requisitions
- Date Range: All Dates
- View Approvals For: Jane Approver1
- State: Not Assigned

Requisition No.	Suppliers	Assigned Approver	PR Date/Time	Requester	Amount	Action
1770769	ACCENT OFFICE INTERIORS INC	Not Assigned	2/10/2017 10:37 AM	Joe User5	2,000.00 USD	Assign
1769071	FLORIDA PIPETTA CALIBRATION	Not Assigned	2/8/2017 4:37 PM	Marcia D Feldman	100.00 USD	Assign

To select to review and approve, click the requisition number or name link.

Group Results By: Folders

Total Results Found: 1

Sort by: Submit date newest first

Filtered by

- Type: Requisitions
- Date Range: All Dates
- View Approvals For: Jane Approver1
- Assigned Approver: Jane Approver1

Requisition No.	Suppliers	Assigned Approver	PR Date/Time	Requester	Amount	Action
1770769	ACCENT OFFICE INTERIORS INC	Jane Approver1	2/10/2017 10:37 AM	Joe User5	2,000.00 USD	Assign

The selected requisition will open up so you can now review the requisition to determine if you can approve it or if changes are required prior to approval.

Summary - Requisition 1770769

1 of 2 Results

Requisition Number(s): 1770769

Folder: 227000

Available Actions: Assign to myself

Assign to myself: There may be more than one approver for the requisitions pending in the folder, so the first step is to ensure the Available actions box has “Assign to myself” showing and click “Go” to assign the requisition to yourself and

remove it from the shared approval folder.

Note: The other approvers will no longer see this requisition in their list once you have assigned it to yourself. If you decide you do not want to take action on a requisition that you have assigned to yourself, you can return it to the shared approver folder by selecting “**Return to Shared Folder**” to allow another approver to see the requisition, assign it to themselves, and take appropriate action.

Approvers should review the requisition to ensure that the items on the requisition are for business use, an appropriate budget is being used or the items are authorized on that particular budget, and that the requisition has the appropriate information in it prior to approval.

Step 1: Review accounting codes to ensure budget used is correct. There are two places where accounting information is found. The first “**Accounting Codes**” field is in the header and will apply to all items unless the line accounting has been updated.

Request Budget Override				View/edit by line item...				Billing Options				
Request Sponsored Project Restriction Override								Accounting Date 2/10/2017				
Supervisors <i>no value</i>								Requested Due Date <i>no value</i>				
								View/edit by line item...				
Accounting Codes												
Business Unit GL	Location	Department	Fund	PC Business Unit	Project-Activity	Source Type	Category	Subcategory	Chartfield 1	Chartfield 2	Chartfield 3	Budget Reference
FSU01 Florida State University	00010001A WESTCOTT BUILDING0001A	010008 Strategic Sourcing Contracts/P	320 Auxiliary Enterprises	<i>no value</i>	<i>no value</i>	<i>no value</i>	<i>no value</i>	<i>no value</i>	<i>no value</i>	<i>no value</i>	<i>no value</i>	<i>no value</i>
Accounting Codes values vary by line												
View/edit by line item...												

In the above example, there is a note that states, “**Accounting Codes values vary by line**” which means that the budgets have been changed at the line level. Click the “**View/edit by line item**” link to see the updates that were made. The line accounting overrides the header Accounting Codes.

ACCENT OFFICE INTERIORS INC [more info...](#)
MAIN
2108-3 GILLIAM LN, TALLAHASSEE, FL 32308 US

Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price							
1 Mahogany Round Conference Room table more info...	MCR123456	1/EA	1,000.00	1 EA	1,000.00 USD	<input type="checkbox"/>						
Accounting Codes values have been overridden for this line												
Business Unit GL	Location	Department	Fund	PC Business Unit	Project-Activity	Source Type	Category	Subcategory	Chartfield 1	Chartfield 2	Chartfield 3	Budget Reference
FSU01	00010001A	027000	110	no value	no value	no value	no value	no value	no value	no value	no value	no value
Florida	WESTCOTT	Procurement	E&G									
State	BUILDING0001A	Services	General									
University			Revenue									
2 Black, ergonomic, vinyl, conference room chairs more info...	BELC456789	1/EA	100.00	10 EA	1,000.00 USD	<input type="checkbox"/>						
Accounting Codes values have been overridden for this line												
Business Unit GL	Location	Department	Fund	PC Business Unit	Project-Activity	Source Type	Category	Subcategory	Chartfield 1	Chartfield 2	Chartfield 3	Budget Reference
FSU01	00010001A	227000	110	no value	no value	no value	no value	no value	no value	no value	no value	no value
Florida	WESTCOTT	Nat'l High	E&G									
State	BUILDING0001A	Magnetic	General									
University		Field Lab	Revenue									

When the line accounting codes open you can see that line #1 is not within your approval, so you can do not have to take action on that line unless the accounting codes seem to be incorrect. Line #2 is on a budget that you are set up as the approver on, so when you take action on this requisition, you will only be approving or returning this line.

If you want to see more detail on the items being purchased, you can click on the “**more info**” link under the description of the item being reviewed. This link will open the form that the requester used. Once you have reviewed the requisition you can the following actions.

Step 2: Review the items being purchased and ensure the budget(s), commodity codes and item information is correct, purchase is allowable on the type of budget, and the purchase is for official business and should be approved.

Available Actions for Approvers to take with requisitions:

1. **Approve:** If you agree that the requisition is valid and the budget information is correct and you want to approve the requisition, go to the “**Available Actions**” box at the top of the requisition and select “**Approve/Complete Step**” from the list, then click “**Go**”. This will approve the requisition and send it to the next level of approval.



Back to Approvals | 1 of 2 Results | Requisition Number(s) 1770769 | Folder: 227000

Available Actions: Approve/Complete Step Go

Requisition | PR Approvals | PO Preview | Comments | Attachments | History

Summary | Shipping | Billing | **Accounting Codes** | Supplier Info

2. **Return to Requester:** If you need the Requester to correct the description, price, budget, or any other portion of the requisition, you can select “**Return to Requester**” in the “**Available Actions**” box and click “**Go**”.

[Back to Approvals](#)
1 of 2 Results
Requisition Number(s) 1770769
Folder: 227000

Available Actions: Return to Requester Go

Requisition
PR Approvals
PO Preview
Comments
Attachments
History

Summary
Shipping
Billing
Accounting Codes
Supplier Info

[Hide value descriptions](#)

You will get a popup comment box so you can enter a note to the Requester (see below). Once you enter the note of what needs changing, click **“Return to Requester”** and the requisition will go back and they will get a notification.

Return to Requester ✕

Return the requisition to the requester as a draft cart so they can correct errors and resubmit for approval.

Reason for return

1000 characters remaining

Characters beyond the limit are not saved, i.e., the note is truncated. Once the note is attached, it is accessible from the History tab of the document.

Return to Requester
Close

- Forward to another approver:** If you need another approver that is not in the pool of approvers for the department or project to review and approve the requisition, you can forward the requisition to them. You would select “Forward to...” in the **“Available Action”** box, click **“Go”** and then select that individual from the search box. The person must be an Approver for you to take this action.

[Back to Approvals](#)
1 of 2 Results
Requisition Number(s) 1770769
Folder: 227000

Available Actions: Forward to ... Go

Requisition
PR Approvals
PO Preview
Comments
Attachments
History

When you click **“Go”** a search box will come up. Enter the person’s first and last names and click **“Search”**, then select them from the list (see below).

User Search

Last Name

First Name

User Name

Email

Department ▼

Results Per Page ▼

Search

Name ▲	User Name ▲	Email ▲	Phone	Action
Approver1, Jane	appr01	JaneApprover1@fsu.edu	+1 (850) 999-9999	[select]
Approver2, Jane	appr02	JaneApprover2@fsu.edu	+1 (850) 999-9999	[select]
Approver3, Jane	appr03	JaneApprover3@fsu.edu	+1 (850) 999-9999	[select]
Approver4, Jane	appr04	JaneApprover4@fsu.edu	+1 (850) 999-9999	[select]

Once a name is selected, you will need to enter a note and the click “Forward” to complete this action.

Forward to ...

Forward To - Jane Approver1

1000 characters remaining
Maximum allowed characters are 1000

Characters beyond the limit are not saved, i.e., the note is truncated. Once the note is attached, it is accessible from the History tab of the document.

- Return to Shared Folder:** If you determine you don't want to take any action on the requisition, you can return the requisition to the approval folder. Select “Return to Shared Folder” in the “Available Actions” box, then click “Go”.

[Back to Approvals](#)
1 of 2 Results
Requisition Number(s) 1770769

Folder: 227000

Available Actions: Return to Shared Folder

Requisition
PR Approvals
PO Preview
Comments
Attachments
History

Summary
Shipping
Billing
Accounting Codes
Supplier Info

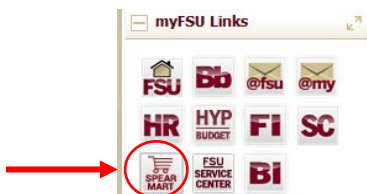
[Hide value descriptions](#)

Take the appropriate action and once you have done that, you can move on to the next one or sign out of the system!

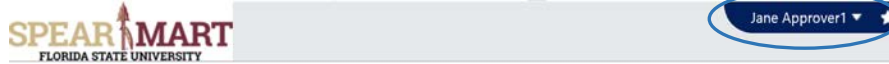
Method 2: Email Approvals

Prior to having this access, you must set up an approver code from within your User Profile.

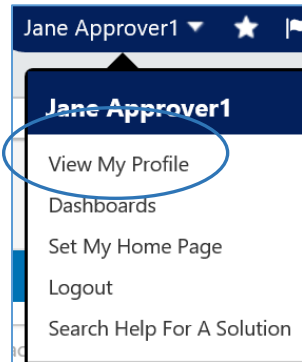
Access SpearMart by navigating to <https://my.fsu.edu/> and logging in with your MyFSU username and password, and then click the SpearMart Icon under MyFSU Links:



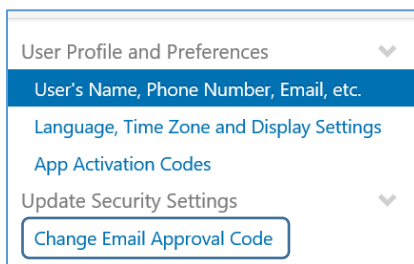
Click on your name at the top of the Home page.



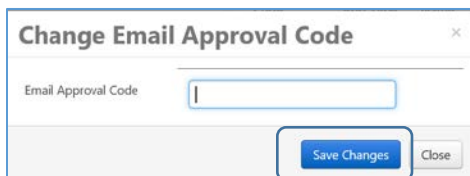
This will open a box with actions. Select **“View My Profile”**.



Click on **“User Profile and Preferences”** to add an approval code. Click **“Change Email Approval Code”**



Click **“App Activation Codes”** to add a code that you will use when approving requisitions.



Enter the code you will use to when approving and click **“Save Changes”**. Now you are set up to approve requisitions directly from the email notification.

Approving from the email notification:

Open the email notification when received.



227000 Approval Request for Requisition# 1778448

Dear Jane Approver1,

The requisition listed below has been submitted for your approval.

Summary

Folder: 227000
 Prepared by: Joe User1
 Cart Name: 2017-02-18 user01 01
 Requisition: 1778448
 No.:
 Priority: Normal
 No. of line: 1
 Items:

TOTAL: 158.00 USD

Details

VWR INTERNATIONAL LLC

Non-Catalog Request

Form Type: Non-Catalog Form

Item 1

Description: Super Widget
 Catalog: Isdfgn
 Number:
 Quantity: 1
 Unit Price: 158.00 USD
 Ext. Price: 158.00 USD
 Size/Packaging: 1/EA
 Commodity: 41100000
 Code:

Code:
 Account: 741191 - Equip Lab/Medical Expendable

FORM TOTAL: 158.00 USD

TOTAL: 158.00 USD

Accounting Codes

Business Unit FSU01 : Florida State University
GL::
Location:: 00700112A : PARKING GARAGE #1 - WOOD0112A
Department:: 227000 : Natl High Magnetic Field Lab
Fund:: 110 : E&G General Revenue
PC Business -
Unit::
Project- -
Activity::
Source Type:: -
Category:: -
Subcategory:: -
Chartfield 1:: -
Chartfield 2:: -
Chartfield 3:: -
Budget -
Reference::

Ready to approve, reject or assign this document to yourself? [Take Action](#)

Additional Information

Summary Details

Request Budget Override: No
 Request Sponsored Project: No
 Restriction Override:
 Supervisors:
 Comments: (0)

Other Possible Approvers

Clyde G. Rea
 Reshaye Greenlee
 Jane Approver2

Shipping Address

ATTN: Joe User1
 RM/FLR/STE: 123
 DEPT: Procurement Services
 2003 Levy Ave
 AME Bldg
 Tallahassee, FL 32310
 United States

[View Requisition Approvals](#)

If you have any questions with regard to reviewing/approving this requisition, please contact your SelectSite Support Team.

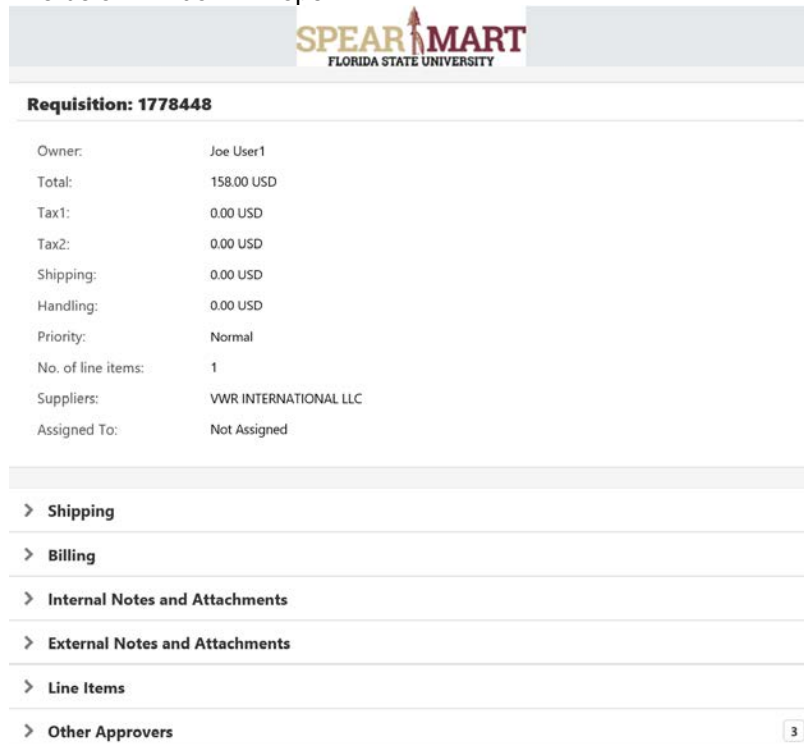
Support Team Contact Information:
 +1 (850) 644-6850
SpearMart@fsu.edu

Thank you,
 Florida State University

Click on **“Take Action”** to review attachments, internal notes, and other details about the requisition.

Ready to approve, reject or assign this document to yourself? [Take Action](#)

The below window will open.



SPEAR MART
FLORIDA STATE UNIVERSITY

Requisition: 1778448

Owner:	Joe User1
Total:	158.00 USD
Tax1:	0.00 USD
Tax2:	0.00 USD
Shipping:	0.00 USD
Handling:	0.00 USD
Priority:	Normal
No. of line items:	1
Suppliers:	VWR INTERNATIONAL LLC
Assigned To:	Not Assigned

- > **Shipping**
- > **Billing**
- > **Internal Notes and Attachments**
- > **External Notes and Attachments**
- > **Line Items**
- > **Other Approvers** 3

Click **“Assign to myself”** to ensure none of the other approvers in the shared approval folder for this requisition have access to take action.

Actions

Approval Code *

Required

Comment



Assign to myself



Approve

You will see a box pop up showing that you have assigned the cart successfully.

Success

Requisition has been Assigned successfully!

Enter the approval code you set-up in your User Profile and click the desired action as outlined above. The choices are shown below on pages 5 through 7.

Actions

Approval Code *

Required

Comment



Approve



Return to Shared Folder



Return to Requester



Forward to...



Reject/Cancel

For this example, **“Approve”** was selected and the below is the message received once that action is complete.

The screenshot shows the SPEAR MART interface for requisition 1778448. The requisition details are as follows:

Owner:	Joe User1
Total:	158.00 USD
Tax1:	0.00 USD
Tax2:	0.00 USD
Shipping:	0.00 USD
Handling:	0.00 USD
Priority:	Normal
No. of line items:	1
Suppliers:	VWR INTERNATIONAL LLC
Assigned To:	Jane App

A green success message box is displayed over the 'Assigned To' field, containing the text: "Success" and "Requisition has been Approved successfully!".

Below the details, there is a list of expandable tabs:

- > Shipping
- > Billing
- > Internal Notes and Attachments
- > External Notes and Attachments
- > Line Items
- > Other Approvers (3)

Congratulations! You have approved a requisition through an email.