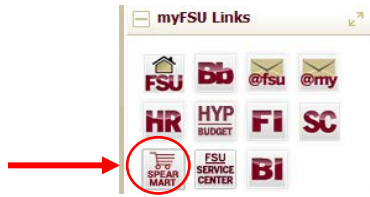
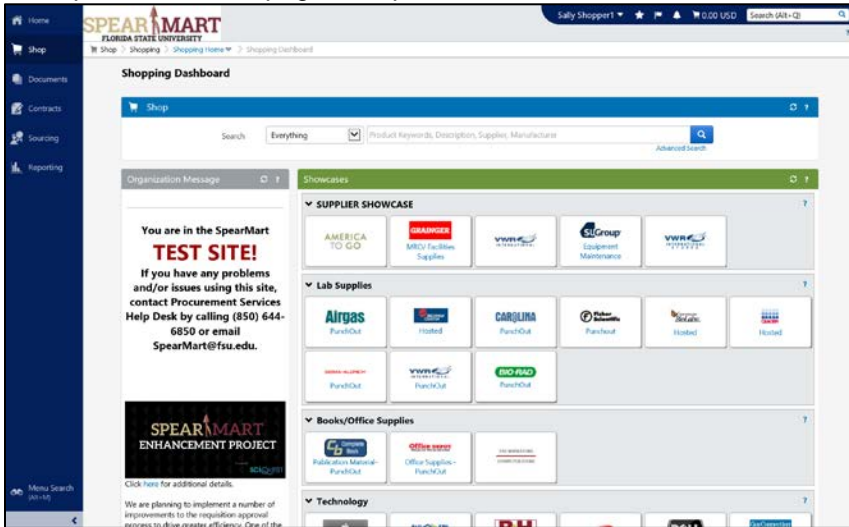


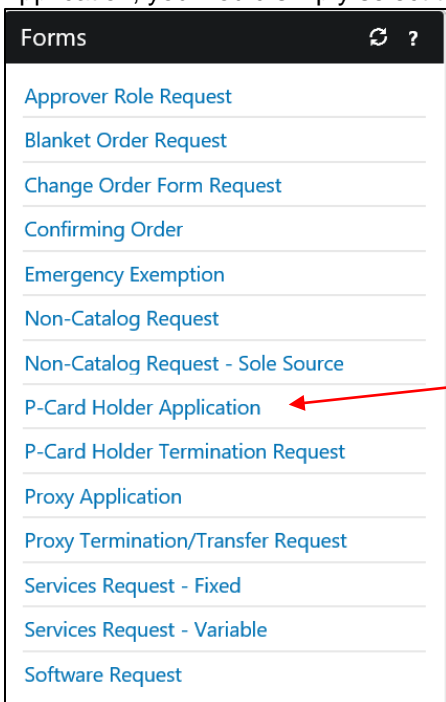
Access SpearMart by navigating to <https://my.fsu.edu/> and logging in with your MyFSU username and password, and then click the SpearMart Icon under MyFSU Links:



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.

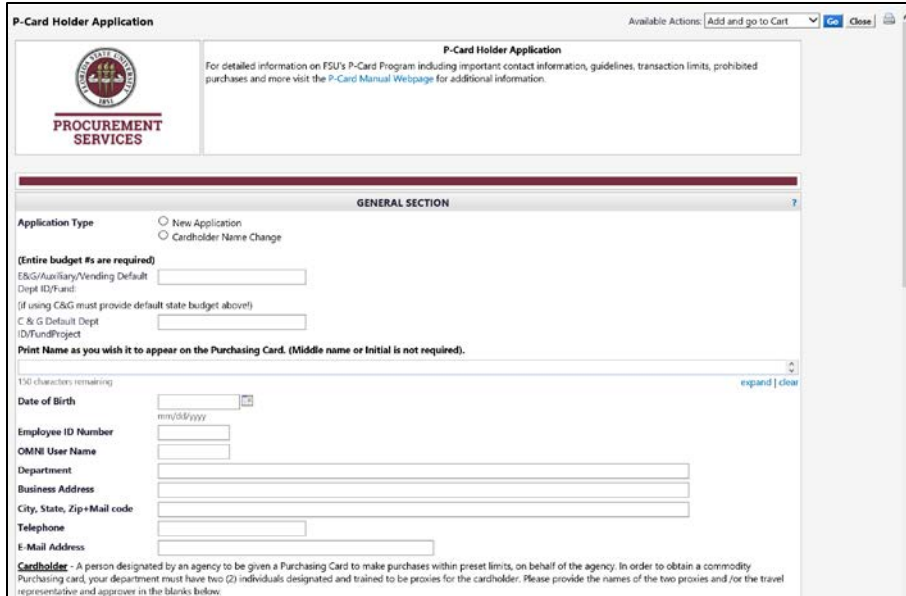


Select the **“P-Card Holder Application”** Form by clicking on the name of the form.

The form will open.

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.



P-Card Holder Application

Available Actions: Add and go to Cart Close

P-Card Holder Application
For detailed information on FSU's P-Card Program including important contact information, guidelines, transaction limits, prohibited purchases and more visit the [P-Card Manual Webpage](#) for additional information.

GENERAL SECTION

Application Type
 New Application
 Cardholder Name Change

(Entire budget #s are required)
 E&G/Auxiliary/Vending Default: _____
 Dept ID/Fund: _____
 (if using C&G must provide default state budget above!)
 C & G Default Dept ID/Fund/Project: _____

Print Name as you wish it to appear on the Purchasing Card. (Middle name or Initial is not required).

 130 characters remaining expand | clear

Date of Birth: _____
 mm/dd/yyyy

Employee ID Number: _____

OMNI User Name: _____

Department: _____

Business Address: _____

City, State, Zip+Mail code: _____

Telephone: _____

E-Mail Address: _____

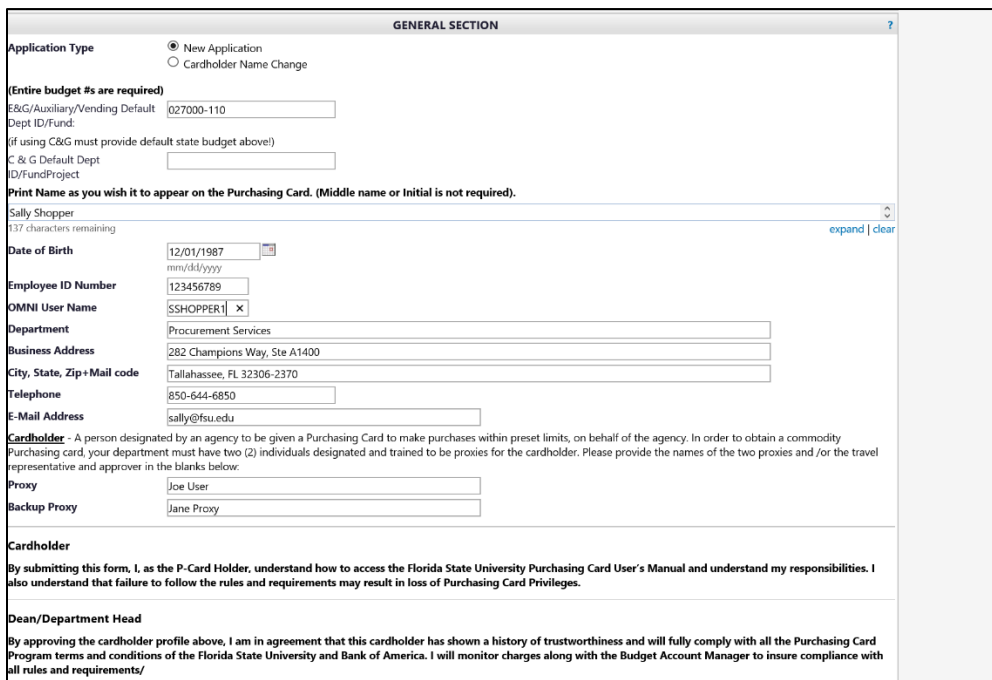
Cardholder - A person designated by an agency to be given a Purchasing Card to make purchases within preset limits, on behalf of the agency. In order to obtain a commodity Purchasing card, your department must have two (2) individuals designated and trained to be proxies for the cardholder. Please provide the names of the two proxies and/or the travel representative and approver in the blanks below.

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.



GENERAL SECTION

Application Type
 New Application
 Cardholder Name Change

(Entire budget #s are required)
 E&G/Auxiliary/Vending Default: 027000-110
 Dept ID/Fund: _____
 (if using C&G must provide default state budget above!)
 C & G Default Dept ID/Fund/Project: _____

Print Name as you wish it to appear on the Purchasing Card. (Middle name or Initial is not required).
 Sally Shopper
 137 characters remaining expand | clear

Date of Birth: 12/01/1987
 mm/dd/yyyy

Employee ID Number: 123456789

OMNI User Name: SSHOPPER1 X

Department: Procurement Services

Business Address: 282 Champions Way, Ste A1400

City, State, Zip+Mail code: Tallahassee, FL 32306-2370

Telephone: 850-644-6850

E-Mail Address: sally@fsu.edu

Cardholder - A person designated by an agency to be given a Purchasing Card to make purchases within preset limits, on behalf of the agency. In order to obtain a commodity Purchasing card, your department must have two (2) individuals designated and trained to be proxies for the cardholder. Please provide the names of the two proxies and/or the travel representative and approver in the blanks below.

Proxy: Joe User

Backup Proxy: Jane Proxy

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/

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

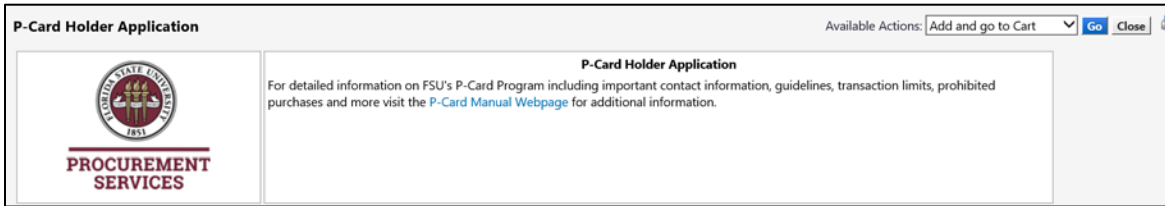
statement listed. When the approvers approve their step of this form process, they are agreeing to the statement that pertains to them as well.

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".



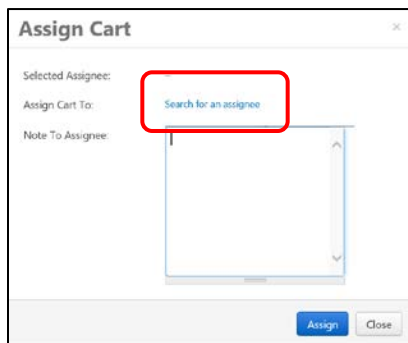
Your application will be placed in a shopping cart.



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.



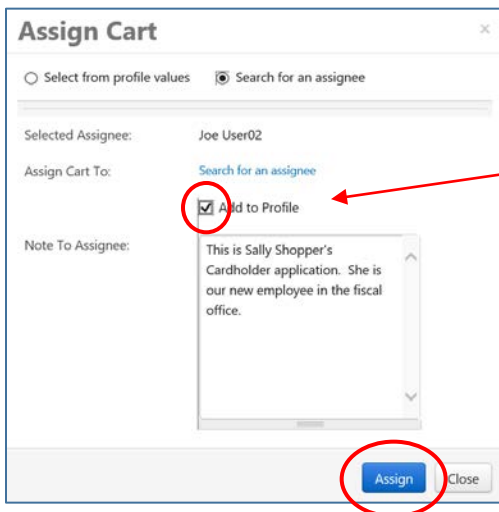
Click **“Search for an Assignee”** to find your Requester in your department to assign the cart to. Enter their first and last name in the **“User Search”** below.



When you find the person’s name, click the **“select”** link under the Action column.

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]

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.

Cart Assigned

Next Steps
You can view the cart in your draft carts list and can unassign it, if needed, until submitted by the assignee. After a cart is submitted by the assignee, you can view it via the [Document Search](#) page.

- [Search for another item](#)
- [Check the status of an order](#)
- [Return to your home page](#)
- [Create new draft cart](#)

Requisition Summary

Requisition number	1790021
Cart name	2017-03-04 shop01 01
Cart total	0.00 USD
Number of line items	1

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.

Hide all values...

FSU01 - Florida State University

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

Accounting Codes

Business Unit GL	Location
FSU01 Select from all values... Required field	Select from all values... Required field

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

Custom Field Search

Value:

Description: university

Search

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.

Click to filter search results ?

Results Per Page: 20 Values Found 2877 Page 1 of 144

Value	Description	
0223A0100	UNIVERSITY CENTER - BLDGA0100	select
0223A0101	UNIVERSITY CENTER - BLDGA0101	select
0223A0101A	UNIVERSITY CENTER - BLDGA0101A	select
0223A0101B	UNIVERSITY CENTER - BLDGA0101B	select
0223A0101C	UNIVERSITY CENTER - BLDGA0101C	select
0223A0102	UNIVERSITY CENTER - BLDGA0102	select
0223A0102A	UNIVERSITY CENTER - BLDGA0102A	select
0223A0103	UNIVERSITY CENTER - BLDGA0103	select

Close

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.

Custom Field Search

Value:

Description: a1400

Search

Now the results include the correct building and suite number.

Click to filter search results ?

Results Per Page: 20 Values Found 2 Page 1 of 1

Value	Description	
0223A1400	UNIVERSITY CENTER - BLDGA1400	select
0223A1400A	UNIVERSITY CENTER - BLDGA1400A	select

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.

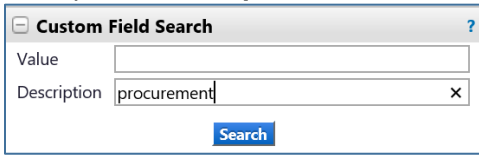
Accounting Codes

Business Unit GL	Location	Department	Fund
FSU01 Select from all values... Required field	0223A1400A Select from all values... Required field	Select from all values... Required field	Select from all values... Required 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”.



Custom Field Search ?

Value:

Description:

[Search](#)

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



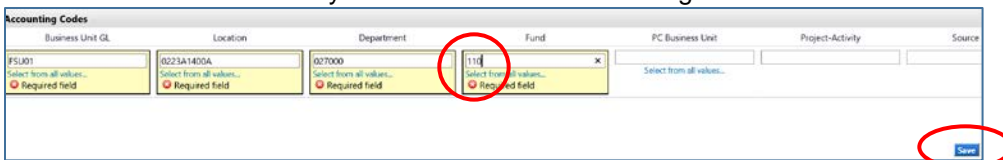
Close

+ Click to filter search results ?

Results Per Page: 20 Values Found 4 Page 1 of 1 ?

Value	Description	
027000	Procurement Services	select
027001	Procurement Services Overhead	select
027002	Procurement Services ERP	select
027003	Procurement Services	select

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



Accounting Codes

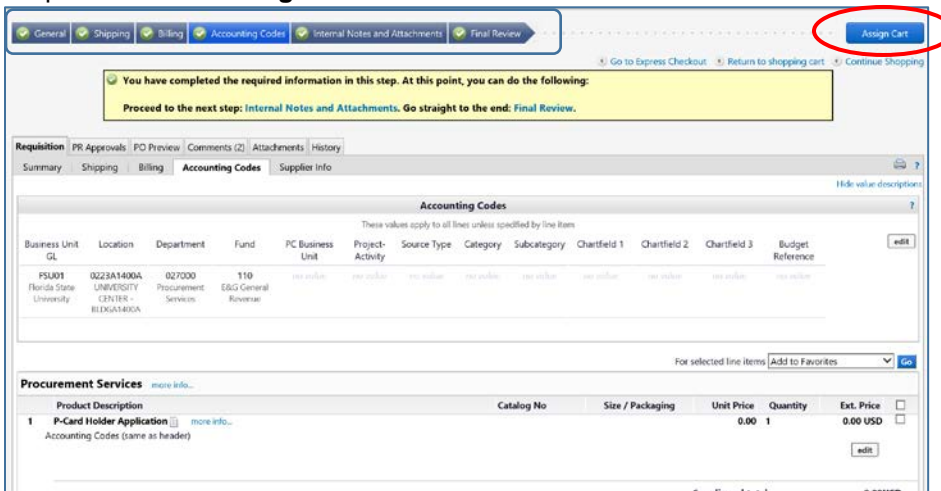
Business Unit GL: PSU01 Location: 0223A1400A Department: 027000 Fund: 110 PC Business Unit: Project-Activity: Source:

[Save](#)

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”.



General Shipping Billing Accounting Codes Internal Notes and Attachments Final Review [Assign Cart](#)

You have completed the required information in this step. At this point, you can do the following:
Proceed to the next step: Internal Notes and Attachments. Go straight to the end: Final Review.

Requisition: PS Approvals: PO Preview: Comments (2): Attachments: History

Summary Shipping Billing Accounting Codes Supplier Info

Accounting Codes

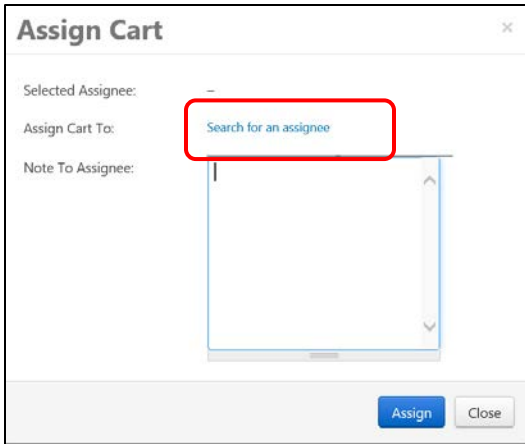
Business Unit GL	Location	Department	Fund	PC Business Unit	Project-Activity	Source Type	Category	Subcategory	Chartfield 1	Chartfield 2	Chartfield 3	Budget Reference
PSU01 Florida State University	0223A1400A UNIVERSITY CENTER - BUILDING 1400A	027000 Procurement Services	110 EBG General Revenue									

For selected line items: [Add to Favorites](#) [Go](#)

Procurement Services

Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price
1 P-Card Holder Application			0.00	1	0.00 USD

The below box will open and click “search for an assignee”.



Assign Cart

Selected Assignee: -

Assign Cart To: [Search for an assignee](#)

Note To 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.



User Search

Last Name:

First Name:

User Name:

Email:

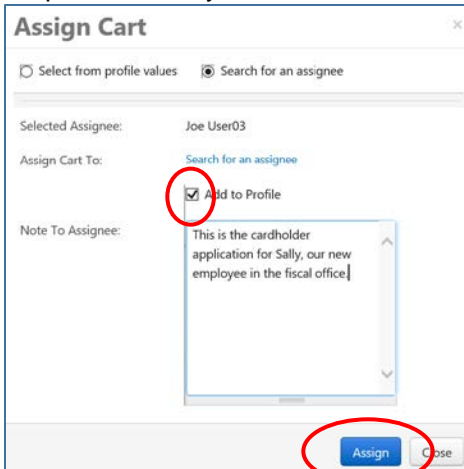
Department:

Records Per Page:

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.



Assign Cart

Select from profile values Search for an assignee


Selected Assignee: Joe User03

Assign Cart To: [Search for an assignee](#)

Add to Profile

Note To Assignee: This is the cardholder application for Sally, our new employee in the fiscal office

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

 **Cart Assigned**

Next Steps
You can view the cart in your draft carts list and can unassign it, if needed, until submitted by the assignee. After a cart is submitted by the assignee, you can view it via the [Document Search page](#)

- [Search for another item](#)
- [Check the status of an order](#)
- [Return to your home page](#)
- [Create new draft cart](#)


Requisition Summary

Requisition number	1790021
Cart name	2017-03-04 shop01 01
Cart total	0.00 USD
Number of line items	1

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.

Proxy Application Available A



PROCUREMENT SERVICES

Proxy Application

For detailed information on FSU's P-Card Program including important contact information, guidelines, transaction limits, prohibited purchases and more visit the [P-Card Manual Webpage](#) for additional information.

GENERAL SECTION ?

Application Type

New Application
 Name Change
 Dept/Fund Change

(Entire budget #s are required)

Default Dept ID & Fund (E&G):

(if using C&G budget, must provide a state/SRAD budget as secondary backup too!)

C & G Default Dept ID & Fund:

Print Name (Middle name or Initial is not required).

150 characters remaining [expand](#) | [clear](#)

Employee ID Number

OMNI User Name

Department

Business Address

City, State, Zip+Mail code

Telephone

E-Mail Address

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

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.