

### <u>Overview</u>

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.

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



## Method 1: SpearMart approvals

The SpearMart Home page will open.

Home	SPEAR				All 🔻	Search (Alt+Q)	Q 0.00	USD 📜	⊘  ⊠	Q,
Shop	JAGGAER revised its <u>Service Privacy Policy</u> effective May 25, 201	8. By closing this banner, you acknowledge	that when you use our Solution, we	process your personal inf	ormation as described in ou	r Service Privacy Polic	<b>y</b> .			
	Shop • Shopping Dashboard									1 +
Orders				_		_	_		<u></u>	-
Contracts	Shop									
Suppliers	Simple Advanced		Go to: Favorites   Forn	ns   Non-Catalog Item	Non-Catalog Request   Quid	k Order Browse:	Suppliers   Catego	nia   Contract	s Chemical	.ls
Juppliera	Search for products, suppliers, forms, part number, etc.								Q	
Sourcing							_/			• •
Reporting										
Administer										
Administer	Requisition Forms ····	Catalog Suppliers								••
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	Blanket Order Request	Campus Supplies for Ramp-Up Act	vities						`	~
	Confirming Order					/				
	Emergency Exemption									
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	Services Request - Fixed									
	Services Request - Variable	Lab Supplies							`	~
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		Airgas Gases / Cylinders	BECOMM Disgnostics & LifeScien-Hosted		BIO FAD Lab products - Specialty	CAR( Biologic	LINA al Supply	Lab Supplie	s -Hosted	
Menu Search	Change Order Forms ····									
<del>~</del>								Pow	ered by JAGGAER	RIPtier

There are several 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 above.
  - 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.



1	SPEAR	
	JAGGAER revised its Sector 10 JAG	<del>avice Privacy Policy</del> effective May 25, 2018. By closing this ban
6	Orders	Quick search Q
ë	Search My Orders	Requisitions to Approve Purchase Orders to Approve
뾽	Approvals	Requisitions Recently Approved By Me Purchase Orders Recently Approved By
39		Assign Substitute Approvers-Requisitions
հե		Assign Substitute Approvers-Purchase O Approval Notifications
	Order Cubmittee	Concert & Miller

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.

Action Items	
UNASSIGNED APPROVALS	
Requisitions	3

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".

<b>^</b>	SPEAR	All 👻	Search (Alt+Q)	٩	1.00 USD	♥	• 👰
	3 JAGGAER revised its <u>Service Privacy Policy</u> effective May 25, 2018. By closing this banner, you acknowledge our Service Privacy Policy.						oed in 🗙
ío	Shop • Shopping Dashboard	Requisiti	ined Approvals			<u> </u>	3 🗋 🕂

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 multiple 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.



### JOB AID Approving a Requisition

otal Results	s 33 Display 20 per fol	der 👻					
> 039000	APPROVALS 10 0 1 0 3						
J	REQUISITION NO.	SUPPLIERS	ASSIGNED APPROVER	PR DATE/TIME	REQUESTER	AMOUNT	
	155443774	FULL PRESS APPAREL	Dana C. Davis	3/16/2022 7:35 AM	Kimberly L. Dodson	828.90 USD	0 Ľ 1
	Requisition Name	2201268/098 Full Press	Folders	6 Days in folder [My PR Appro	ovals]		
	No. of line items	4		6 Days in folder [040000]			
	155446149	NEMETSCHEK VECTORWORKS INC	Not Assigned	3/16/2022 8:45 AM	Kimberly L. Dodson	2,959.00 USD	0 Ľ
	Requisition Name	2201268/089 Vector Works	Folders	0 Days in folder [040000]			
	No. of line items	1					
	155660749	CONNIE LILES AUTO PARTS	Not Assigned	3/22/2022 8:57 AM	Kyler Singletary	133.52 USD	0 1
	Requisition Name	PR 48283 _ Connie Liles	Folders	0 Days in folder [040000]			
	No. of line items	4					
	This PR has notes	$\checkmark$					

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

~ 04000	0 3					
	REQUISITION NO.	SUPPLIERS	ASSIGNED APPROVER	PR DATE/TIME	REQUESTER	AMOUNT
	155443774	FULL PRESS APPAREL	Dana C. Davis	3/16/2022 7:35 AM	Kimberly L. Dodson	828.90 USD
	Requisition Name	2201268/098 Full Press	Folders	6 Days in folder [My PR App	provals]	

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.

Requisition • 155443774 •						🗮 🐵 🖶 😝 1 of 3 Results 👻 <	Assign To Myself 👻
Summary PO Preview Comments	Attachments 1 History						
						Pending	
You are reviewing a requisition currently as	signed to the approver Dana C. Davis					Total (828.90 USD)	>
General	1	Shipping	ø	Billing	Ø V	What's next?	>
Status 😋 Pending		Shin To		Bill To		1	

**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. Click the box 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 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" section** is in the header and will apply to all items unless the line accounting has been updated.



Accounting	g Codes														ø
Values var	y by line.														
Business Unit GL	Location	Department ID	Fund	PC Business Unit	Project- Activity	Source Type	Category	Subcategory		Chartfield 2	Chartfield 3	Budget Reference	FAC- Work Order	FAC- Phase	FAC- Inventory Part
FSU01	0223A1400A UNIVERSITY CENTER - BLDGA1400A	027000 Procurement Services	110 E&G General Revenue	no value	no value	no value	no value	no value	no value	no value	no value	no value	no value	no value	no value

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. You will need to scroll down to view the line item(s) to view any budget information. Note: The line accounting overrides the header Accounting Codes.

PU	BLIX SUPER	MARKETS	· 1 Item · 2	50.00 U	SD												
^	SUPPLIER DETA	AILS LAKELAN	ID FL-ACH : 80	0 OCALA R	D, TALLAHA	SSEE, Fl	•										
	PO Number	Т	o Be Assigne	d													
	Item						Catalog	No.	Size/Pack	aging	Unit	Price	Quan	tity	Ext	. Price	
1		rovide training and customer s		ty, proper	food handl	ing					25	50.00	Qt	y: 1		250.00	
	∧ ITEM DETA	ILS 📄															
	Contract:		no value	9					Interr	nal Note		no value					
	Account		740272 Employee						Exter	nal Note		no value					
	Commodif	ty Code	860000	00 / Educa	ation/ Train	ing Servic	es (7402	72)									
	ACCOUNTI	NG CODES											Values have t	oeen over	ridden for	this line 🖋	Ĩ
	Business Unit GL	Location	Department ID	Fund	PC Business Unit			Category	Subcategory		Chartfield 2	Chartfield 3	Budget Reference	FAC- Work Order	FAC- Phase	FAC- Inventory Part	% of Price
	FSU01	0223A1400A UNIVERSITY CENTER - BLDGA1400A	027000 Procurement Services	<b>110</b> E&G General Revenue	no value	no value	no value	no value	no value	no value	no value	no value	no value	no value	no value	no value	50%
	FSU01	0223A1400A UNIVERSITY CENTER - BLDGA1400A	227000 Natl High Magnetic Field Lab	<b>110</b> E&G General Revenue	no value	no value	no value	no value	no value	no value	no value	no value	no value	no value	no value	no value	50%

When the line accounting codes open you can see that accounting line #1 is not within your approval, so you do not have to take action on that line unless the accounting codes seem to be incorrect. Accounting 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 accounting 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:

 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.

Requisition	• 155566	195 🔹		⊟ 💿 🖻 🕢 1of1Results ▼ 🔇	> Approve/Complete Step 👻
Summary	PO Preview	Comments	Attachments 2 History		

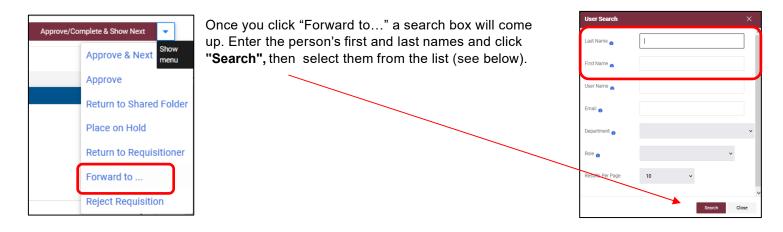
2. **Return to Requester:** If you need the Requester to correct the description, price, budget, or any other portion of the requisition, you can select **"Return to Requester"** in the **"Available Actions" drop down**.

equisition • 1	55566195 -					•      •	pprove/Complete Step
Summary PO Pr	review Comments Attachments 2 History						Approve Sho
							Return to Shared Fo
General	ø	Shipping	ø · · ·	Billing	ø v	Pending	Place on Hold
Status	C Pending Procurement Approval (Geneva (Adm) Miller)	Ship To		Bill To		Total (750.00 USD)	Return to Requisitio
Submitted	3/18/2022 11:35 AM	ATTN: Tyrone Austin DEPT: University Housing 800 W Madison St RM 112		CTL-Invoices@fsu.edu PAYABLES & DISBURSEMENT SERVICES UCA-5607 UNIVERSITY CENTER		Subtotal	Forward to
Cart Name	2022-03-18 TAUSTIN2 01	Central Receiving		TALLAHASSEE, FL 32306-2391			Reject Requisition

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 "**Save Changes**" and the requisition will go back and they will get a notification.

Return To Requester	×
1	li.
1000 characters remaining	expand   clear
Characters beyond the limit are not saved, i.e., the note is truncated note is attached, it is accessible from the History tab of the docume	
Save Changes	Cancel

3. **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 and then select that individual from the search box. The person must be an Approver for you to take this action.





Click the "+" sign to select the approver.

User Search				×
New Search				
Name 1	User Name	Email	Phone	Action
Holmes, Ololade	NOHOLMES	noholmes@fsu.edu	+1 850-645-8207	+
				Close

Once a name is selected, you will need to enter a note and then click "Forward" to complete this action.

Forward To	×
Forward To - Holmes, Ololade	
1	li
1000 characters remaining Characters beyond the limit are not saved, i.e., the note is truncated. I note is attached, it is accessible from the History tab of the documen	
Forward	Cancel

4. **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**" drop down.

Approve/Co	mplete & Show Next 🗸 🤜
	Approve & Next Show menu
	Approve
P	Return to Shared Folder
l (0.00 USD)	Place on Hold
otal	Return to Requisitioner
	Forward to
ie novi2	Reject Requisition

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

Approving from the email notification:

Open the email notification when received. Scroll to the bottom of the email for the section titled: "Ready to approve, reject or assign this document to yourself?"

SPEAR FLORIDA STA	MART	
Approver 156687549	Role Request Approval Request for Requisition#	
Dear Geneva (Adm)	Miller,	
The requisition listed Summary	below has been submitted for your approval.	
Folder: Order Submitter: Cart Name: Requisition No.: Priority: No. of line items:	Approver Role Request Jania S. Kadar 2022-04-14 JS07H 02 156687549 Normal 1	
TOTAL: Details	0.00 USD	
Details 	rvices	
Details	rvices	
Details Procurement Se	rvices uest UserRoleRequest Approver Role Request 1 0.00 USD 0.00 USD 999999999 (740231)	
Details Procurement Set Approver Role Req Form Type: tem 1 Description: Catalog Number: Quantity: Jnit Price: Ext. Price: Size/Packaging: Commodity Code: Account:	rvices uest UserRoleRequest Approver Role Request 1 0.00 USD 0.00 USD 999999999 (740231)	



### Accounting Codes

### Accounting Codes

Business Unit GL:	FSU01 : Florida State University
Location:	00171033 : JOHNSTON BUILDING1033
Department ID:	197000 : Art Education
Fund:	110 : E&G General Revenue
PC Business Unit:	-
Project-Activity:	-
Source Type:	-
Category:	-
Subcategory:	-
Chartfield 1:	-
Chartfield 2:	-
Chartfield 3:	-
Budget Reference:	-
FAC-Work Order:	-
FAC-Phase:	-
FAC-Inventory Part:	-

### **Procurement Information**

Buyer Procurement Officer: – Email: – Phone: – OPRID: –

	Take
Action	

Click on 'Take Action" to review attachments, internal notes, and other details about the requisition.

The below window will open.



Requisitions: 156687549   Owner: Jania S. Kadar   Total: 0.00 USD   Discount: 0.00 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: Procurement Services   Assigned To: Not Assigned   Shipping Jone Assigned   Shipping Jone Assigned   Shipping Jone Assigned   Statemal Notes and Attachments   Jone Ine Items:   Jone Approvers     Comment     Assign to myself		
Total:     0.00 USD       Discount:     0.00 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:     Procurement Services       Assigned To:     Not Assigned       Shipping     Vot Assigned       Shipping     Internal Notes and Attachments       Stime Items     2       Actions     2       Comment     2	Requisitions: 15668	7549
Discount: 0.00 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: Procurement Services   Assigned To: Not Assigned   > Shipping   > Shipping Vot Assigned   > Internal Notes and Attachments   > External Notes and Attachments   > Line Items   > Other Approvers   2   Actions   Comment   Assign to myself	Owner:	Jania S. Kadar
Tax1: 0.00 USD   Tax2: 0.00 USD   Shipping: 0.00 USD   Handling: 0.00 USD   Priority: Normal   No. of line items: 1   Suppliers: Procurement Services   Assigned To: Not Assigned     > Shipping   > Internal Notes and Attachments   > External Notes and Attachments   > Line Items   > Other Approvers   2   Actions   Comment     Assign to myself	Total:	0.00 USD
Tax2: 0.00 USD Shipping: 0.00 USD Handling: 0.00 USD Priority: Normal No. of line items: 1 Suppliers: Procurement Services Assigned To: Not Assigned Shipping	Discount:	0.00 USD
Shipping: 0.00 USD Handling: 0.00 USD Priority: Normal No. of line items: 1 Suppliers: Procurement Services Assigned To: Not Assigned Shipping Shipping Shipping Shipping Internal Notes and Attachments External Notes and Attachments Conter Approvers 2 Actions Comment Assign to myself	Tax1:	0.00 USD
Handling: 0.00 USD   Priority: Normal   No. of line items: 1   Suppliers: Procurement Services   Assigned To: Not Assigned   > Shipping   > Shipping    > Billing   > Internal Notes and Attachments   > External Notes and Attachments   > Line Items   > Other Approvers     2   Actions   Comment     Assign to myself	Tax2:	0.00 USD
Priority: Normal   No. of line items: 1   Suppliers: Procurement Services   Assigned To: Not Assigned     > Shipping   > Billing   > Internal Notes and Attachments   > External Notes and Attachments   > Line Items   > Other Approvers   Comment     Assign to myself	Shipping:	0.00 USD
No. of line items: 1   Suppliers: Procurement Services   Assigned To: Not Assigned     > Shipping   > Billing   > Internal Notes and Attachments   > External Notes and Attachments   > Line Items   > Other Approvers   Comment     Actions   Comment     Assign to myself	Handling:	0.00 USD
Suppliers: Procurement Services   Assigned To: Not Assigned     > Shipping   > Billing   > Internal Notes and Attachments   > External Notes and Attachments   > Line Items   > Other Approvers   2     Actions   Comment     Image: Comment in the service in the ser	Priority:	Normal
Assigned To: Not Assigned Shipping Billing Internal Notes and Attachments Itine Items Other Approvers Comment Assign to myself	No. of line items:	1
<ul> <li>&gt; Shipping</li> <li>&gt; Billing</li> <li>&gt; Internal Notes and Attachments</li> <li>&gt; External Notes and Attachments</li> <li>&gt; External Notes and Attachments</li> <li>&gt; Line Items</li> <li>&gt; Other Approvers</li> <li>2</li> </ul> Actions Comment Assign to myself	Suppliers:	Procurement Services
<ul> <li>&gt; Billing</li> <li>&gt; Internal Notes and Attachments</li> <li>&gt; External Notes and Attachments</li> <li>&gt; Line Items</li> <li>&gt; Other Approvers</li> <li>2</li> </ul> Actions   Comment   Image: Comment     Assign to myself	Assigned To:	Not Assigned
<ul> <li>&gt; Billing</li> <li>&gt; Internal Notes and Attachments</li> <li>&gt; External Notes and Attachments</li> <li>&gt; Line Items</li> <li>&gt; Other Approvers</li> <li>2</li> </ul> Actions   Comment   Image: Comment     Assign to myself		
<ul> <li>Internal Notes and Attachments</li> <li>External Notes and Attachments</li> <li>Line Items</li> <li>Other Approvers</li> </ul> Actions   Comment   Image: Comment     Assign to myself	> Shipping	
<ul> <li>External Notes and Attachments</li> <li>Line Items</li> <li>Other Approvers</li> </ul> Actions   Comment   Assign to myself	> Billing	
<ul> <li>&gt; Line Items</li> <li>&gt; Other Approvers</li> <li>2</li> </ul> Actions   Comment   Image: Comment   Image: Comment   Image: Comment   Image: Comment     Assign to myself	> Internal Notes and A	ttachments
> Other Approvers 2 Actions Comment Assign to myself	> External Notes and A	Attachments
Actions Comment Assign to myself	> Line Items	
Comment	> Other Approvers	2
Comment	Actions	
Assign to myself		
O Approve	0	Assign to myself
	0	Арргоvе

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



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

# Success

**Requisitions has been Assigned successfully!** 

From there, the following options appear for you choose from. In this example, we will select "Approve."

Actions		
Comment		
		11.
0	Approve	
Θ	Return to Shared Folder	
•	Return to Requester	
0	Forward to	
$\odot$	Reject/Cancel	

Success	
Requisition h	as been Approved successfully

Congratulations! You have approved a requisition through an email.