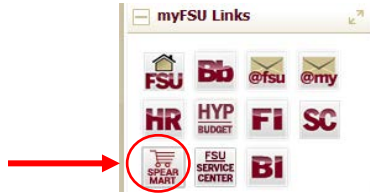
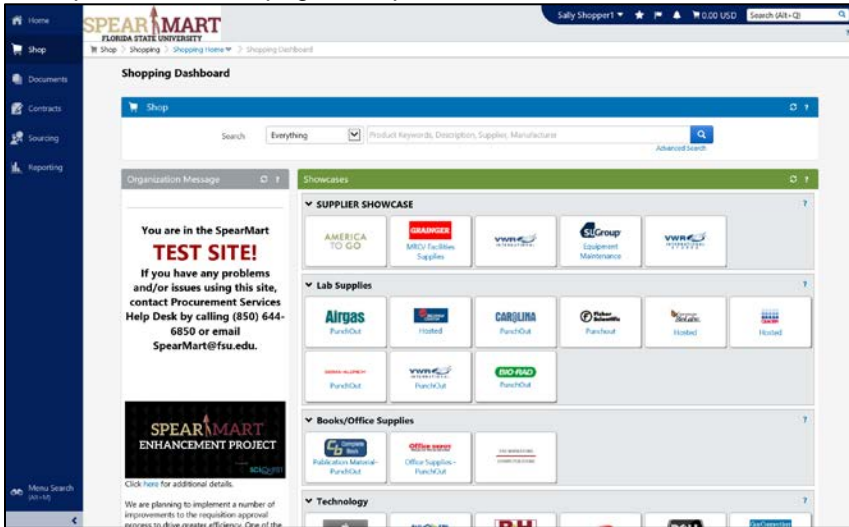


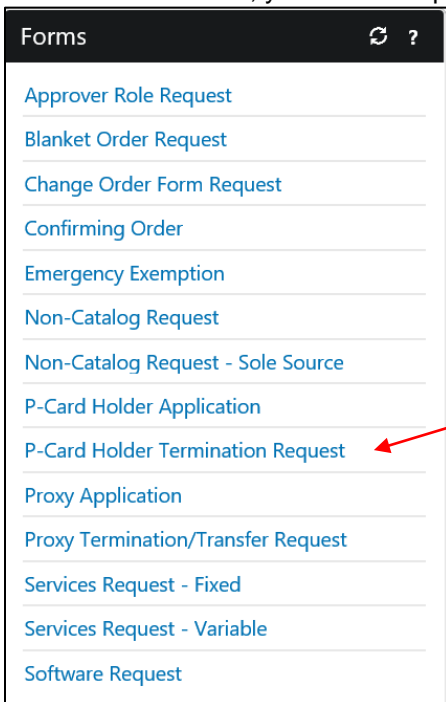
Access SpearMart by navigating to <https://my.fsu.edu/> and logging in with your MyFSU username and password, and then click the SpearMart Icon under MyFSU Links:



The SpearMart Home page will open.



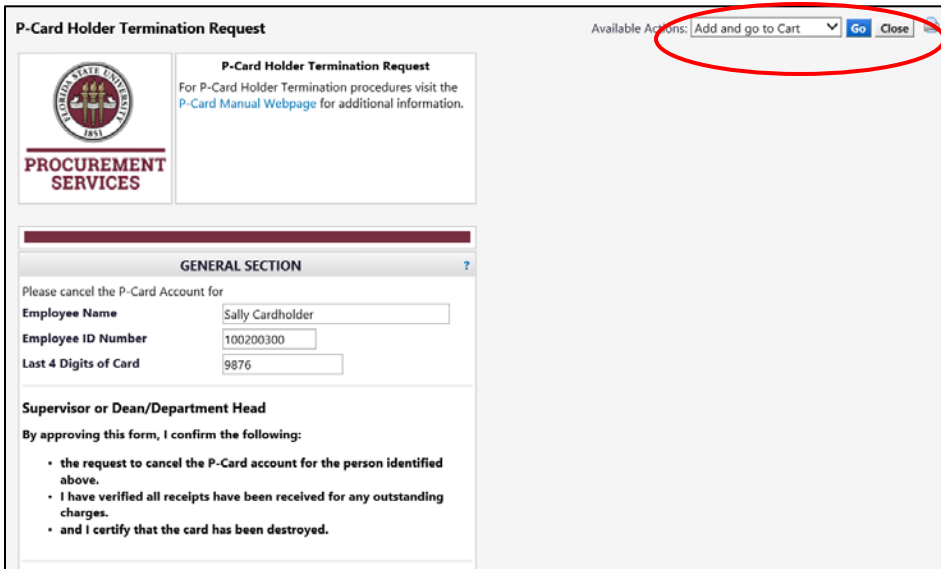
To submit a P-Card Card Holder or Proxy Termination/Transfer Form, scroll down on the page to find the list of Forms which are found under the catalog icons. For this example, a P-Card Holder Termination/Transfer Form needs to be submitted for an employee that is transferring to another department or leaving the University. Therefore, the P-Card Holder Termination/Transfer Request is selected. The tasks outlined in this Job Aid are the same for the Proxy Termination/Transfer, you would simply select that form to remove a Proxy from your department cardholders' records.



Select the "P-Card Holder Termination/Transfer" 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.



P-Card Holder Termination Request

Available Actions: Add and go to Cart Go Close

P-Card Holder Termination Request
For P-Card Holder Termination procedures visit the [P-Card Manual Webpage](#) for additional information.

GENERAL SECTION

Please cancel the P-Card Account for

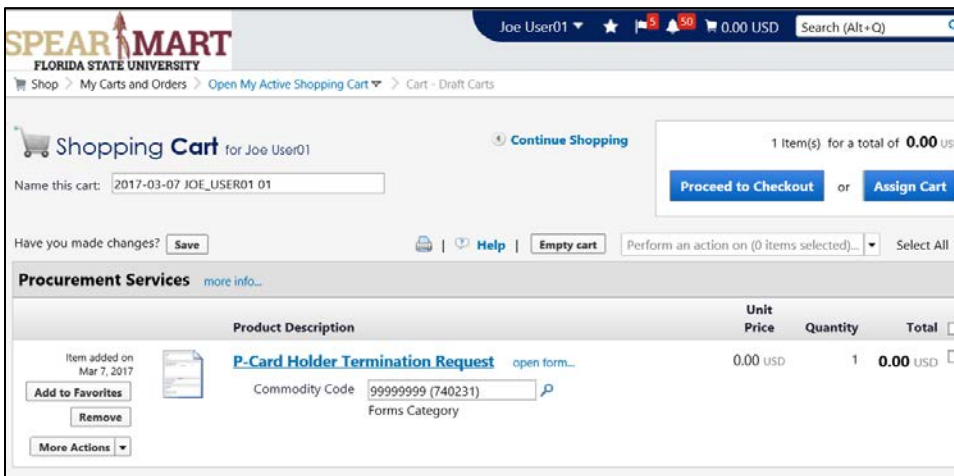
Employee Name Sally Cardholder
Employee ID Number 100200300
Last 4 Digits of Card 9876

Supervisor or Dean/Department Head
By approving this form, I confirm the following:

- the request to cancel the P-Card account for the person identified above.
- I have verified all receipts have been received for any outstanding charges.
- and I certify that the card has been destroyed.

Once completed, review the certification statement for the Card Holder, Supervisor or Dean/Director. 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.

Your application will be placed in a shopping cart.



Joe User01 0.00 USD Search (Alt+Q)

Shop > My Carts and Orders > Open My Active Shopping Cart > Cart - Draft Carts

Shopping Cart for Joe User01 [Continue Shopping](#) 1 Item(s) for a total of **0.00** USD

Name this cart: 2017-03-07 JOE_USER01 01 [Proceed to Checkout](#) or [Assign Cart](#)

Have you made changes? [Save](#) [Help](#) [Empty cart](#) Perform an action on (0 items selected) Select All

Procurement Services [more info...](#)

Product Description	Unit Price	Quantity	Total	
Item added on Mar 7, 2017 Add to Favorites Remove More Actions	P-Card Holder Termination Request open form...	0.00 USD	1	0.00 USD
	Commodity Code 99999999 (740231)			
	Forms Category			

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.

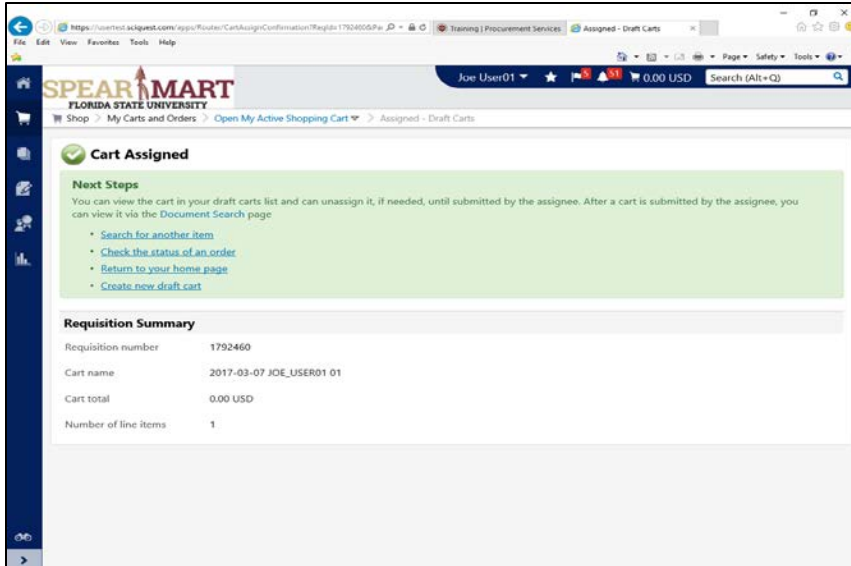
When you find the person’s name, click the **“select”** link under the Action column.

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]
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]

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.

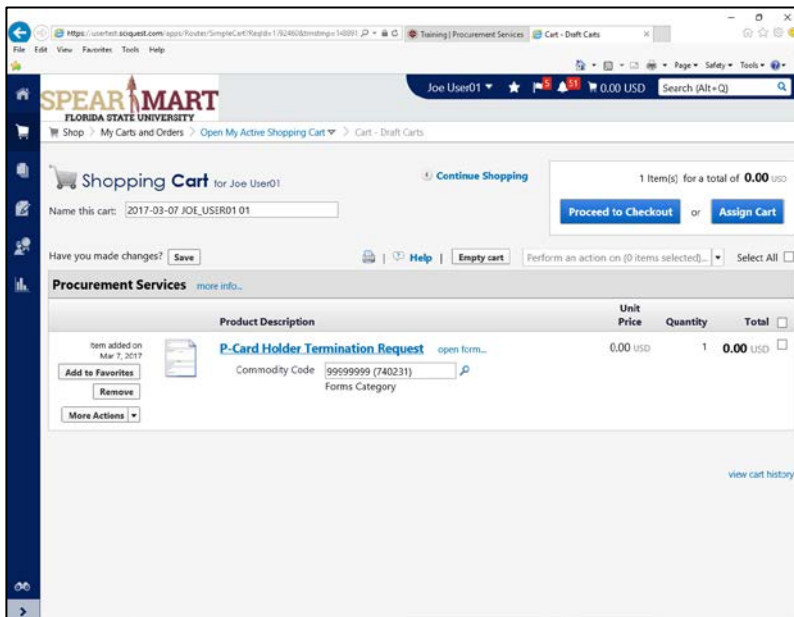
Click **“Assign”** to assign the cart to the selected Requester.

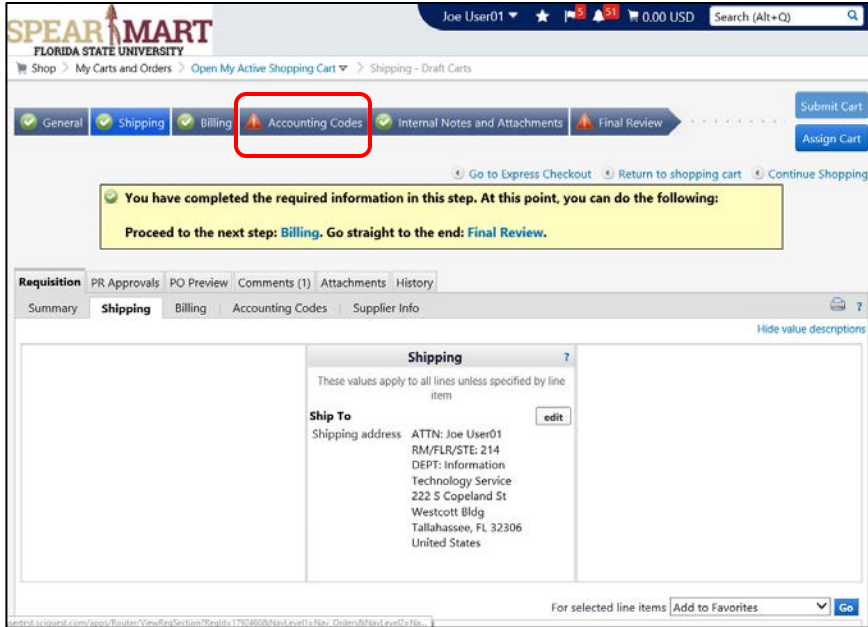


You have successfully assigned your cart to a department Requester!

“**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.

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



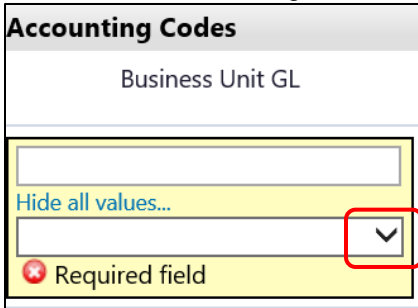


The “Accounting Codes” tab has a red exclamation mark, which means it is information must be updated before submitting. Click the “Accounting Codes” tab. To update the Accounting Codes, click the “**edit**” button.

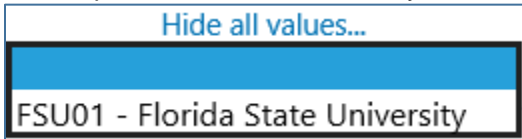
The first field is the “Business Unit GL”. Click the “**Select from all values**” link.



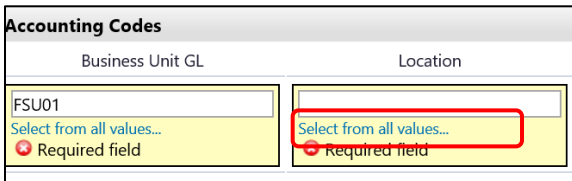
Click the down arrow to get the value “FSU01”.



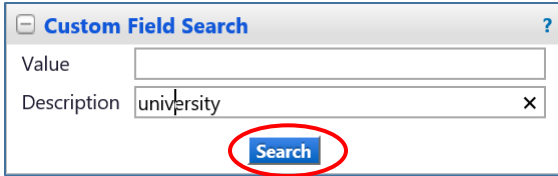
The drop down menu will have only one value to select. Select “FSU01” and it will populate the field.



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.



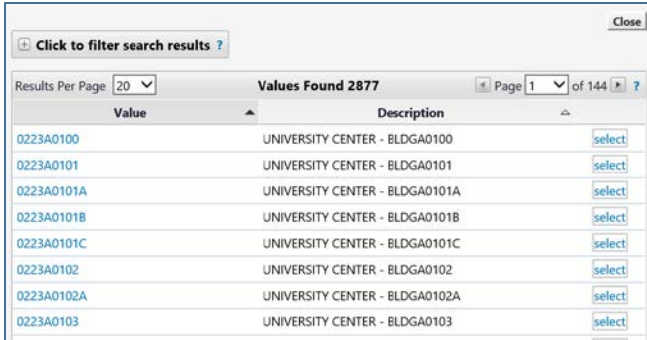
Custom Field Search

Value:

Description:

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.

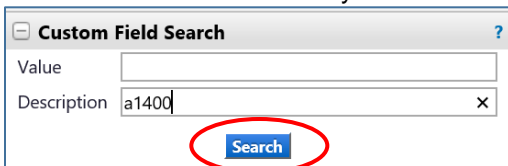


Click to filter search results ?

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

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.



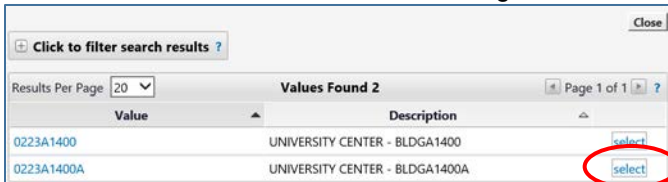
Custom Field Search

Value:

Description:

Search

Now the results include the correct building and suite number.

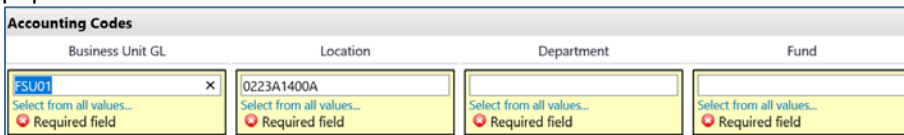


Click to filter search results ?

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.



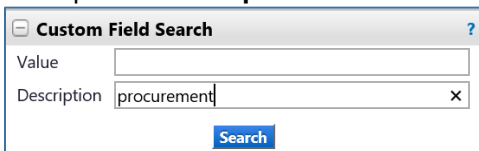
Accounting Codes

Business Unit GL	Location	Department	Fund
<input type="text" value="FSU01"/>	<input type="text" value="0223A1400A"/>	<input type="text"/>	<input type="text"/>

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	Location	Department	Fund	PC Business Unit	Project-Activity	Source
FSU01	0223A1400A	027000	110			

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".

SPEAR MART FLORIDA STATE UNIVERSITY

Joe User01 0.00 USD Search (Alt+Q)

Shop > My Carts and Orders > Open My Active Shopping Cart > Accounting Codes - Draft Carts

General Shipping Billing Accounting Codes Internal Notes and Attachments Final Review

Submit Cart 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 PR Approvals PO Preview Comments (1) Attachments History

Summary Shipping Billing Accounting Codes Supplier Info

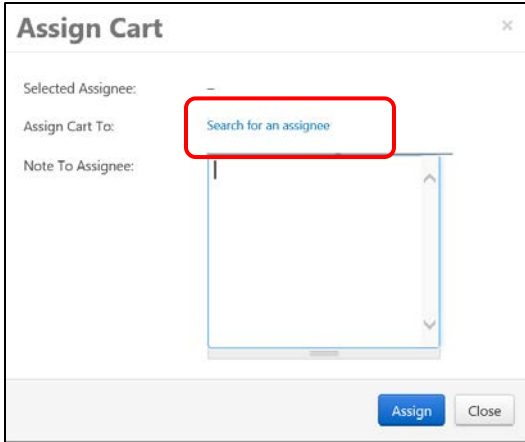
Accounting Codes

These values apply to all lines unless specified by line item

Business Unit GL	Location	Department	Fund	PC Business Unit	Project-Activity	Source	Category	Subcategory	Chartfield 1	Chartfield 2	Chartfield 3	Budget Reference
FSU01	0223A1400A	027000	110									
Florida State University	UNIVERSITY CENTER - BLDG1400A	Procurement Services	EB&G General Revenue									

For selected line items Add to Favorites Go

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:

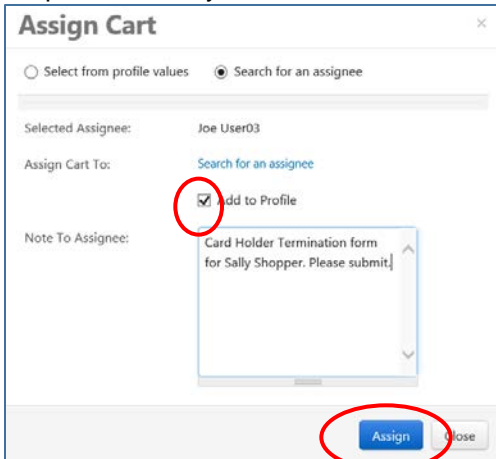
Department:

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: Card Holder Termination form for Sally Shopper. Please submit.

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	1792460
Cart name	2017-03-07 JOE_USER01 01
Cart total	0.00 USD
Number of line items	1

You have successfully assigned your cart!

Below is a picture of the Proxy Termination/Transfer Form. The instructions are the same as for the Cardholder form other than there are some different fields to fill in. Fill in the required items and submit or assign the cart for approval.

Proxy Termination/Transfer Request Available Actions: 



P-Card Proxy Termination/Transfer Request

For P-Card Proxy Termination/Transfer procedures visit the [P-Card Manual Webpage](#) for additional information.

GENERAL SECTION ?

Proxy Name

Employee ID Number

Department Name

Please specify a reason for Proxy deactivation:

- Employment terminated
- Transferred employment within FSU
- Participation no longer required by department(i.e. person on leave is returning, add'l backup etc.)
- No longer wishes to participate
- Continual misuse of the card has occurred
- Department can no longer provide a complete P -Card Support System

PROXIES REMAINING FOR DEPARTMENTAL P-CARDS:

PROXY 1

PROXY 2

SPECIAL NOTE: DEPARTMENTS MUST HAVE TWO PROXIES TRAINED AND ELIGIBLE TO PROCESS CARDHOLDER CHARGES AT ALL TIMES. IF THIS TERMINATION RESULTS IN ONLY ONE PROXY, THE DEPARTMENT CARDS MAY BE PLACED ON HOLD UNTIL A SECOND PROXY CAN BE TRAINED AND ASSIGNED!