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.

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.

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

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

Enter part of the building name. For this example, “university” was entered because Procurement is located in University Center A.
JOB AID
Submitting a P-Card Holder or Proxy Termination

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.
JOB AID
Submitting a P-Card Holder or Proxy Termination

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”.

© Florida State University Procurement Services
A1400 University Center, Tallahassee, FL 32306-2370
Revised 03/2017 Page 7 of 9
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.

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 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.