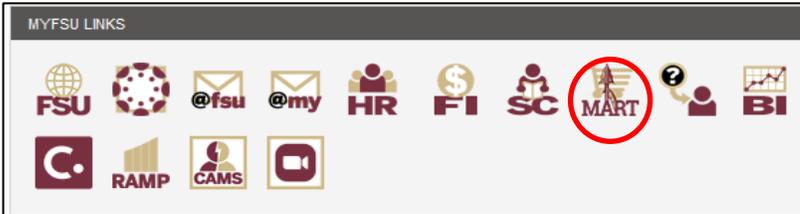


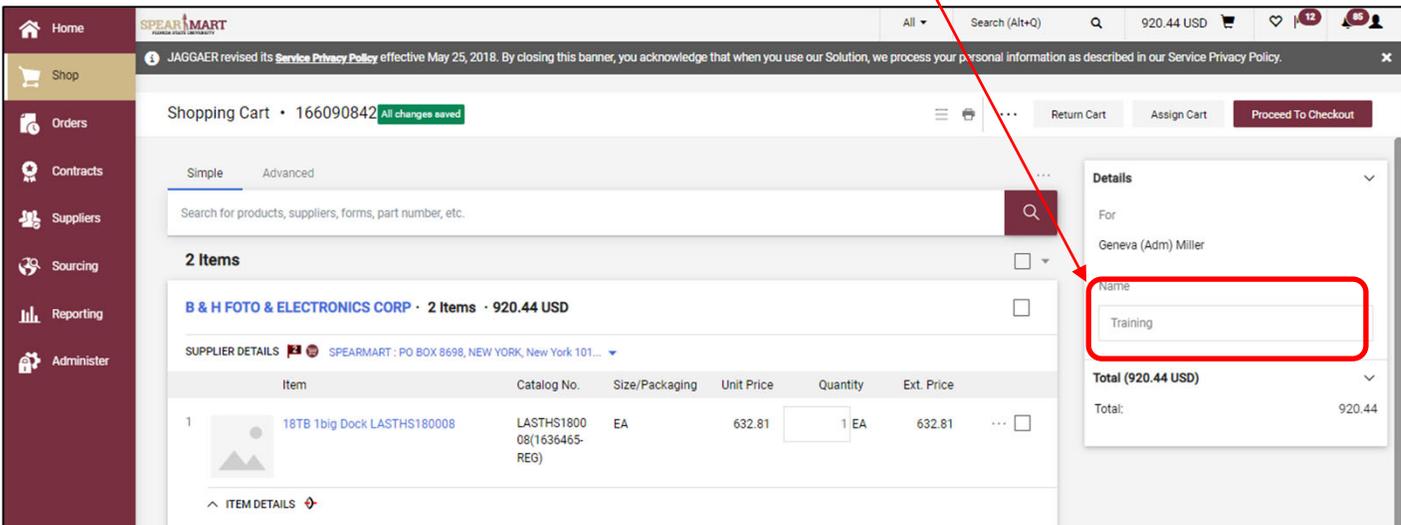
Overview

This Job Aid is for those who have the Requester Role. While Shoppers can complete this information they must assign their cart to a Requester to actually place their orders. Requesters can create carts, process carts from other shoppers/requesters and also submit the order for processing. This Job Aid does not cover the shopping portion of creating a cart as this is covered in the Shopping Job Aids.

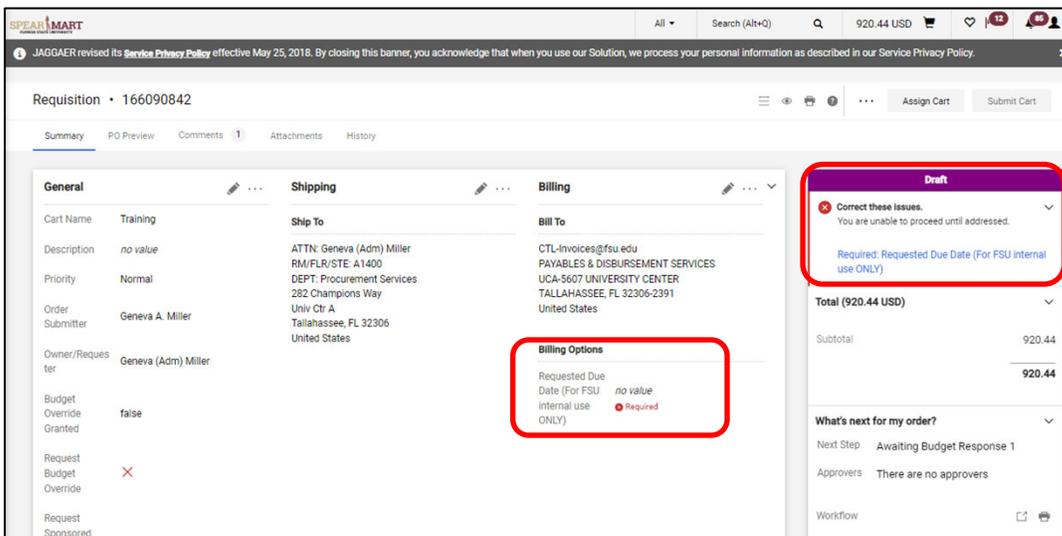
Access SpearMart by navigating to <https://my.fsu.edu/> and logging in with your MyFSU username and password, and then click the SpearMart Icon under MyFSU Links:



Make sure to name your cart so that it will be easy to use for finding the requisition in the future.



Once you Proceed to Checkout, Notice the Guided Workflow Status Bar at the right shows you what areas require your attention. See the *Setting Up Your Profile* Job Aid for guidance on how to set up default ship-to, chart fields etc. which makes processing your shopping carts even more efficient.



Click the “Pencil” button in the “Shipping” box to add or update the shipping address.

Requisition • 166090842

Summary PO Preview Comments 1 Attachments History

| General | Shipping |
|--------------------------------------|----------------------------|
| Cart Name: Training | Ship To |
| Description: no value | ATTN: Geneva (Adm) Miller |
| Priority: Normal | RM/FLR/STE: A1400 |
| Order Submitter: Geneva A. Miller | DEPT: Procurement Services |
| Owner/Requester: Geneva (Adm) Miller | 282 Champions Way |
| Budget Override Granted: false | Univ Ctr A |
| | Tallahassee, FL 32306 |
| | United States |

Enter your address into the Search Additional box and select the appropriate address.

Edit Shipping

Magnet Lab – James Carroll Johnson, [RM/FLR/STE*], Procurement Services, 1800 E Paul Dirac Dr, Magnet Lab, Tallahassee...

Magnet Lab Receiving – James Carroll Johnson, [RM/FLR/STE*], Procurement Services, 1800 E Paul Dirac Dr, Magnet Lab R...

Mag Lab | X Q Results Per Page 10

★ Required fields Save Close

Please make sure that ATTN, RM/FLR/STE, & DEPT FIELDS are filled in.

Edit Shipping

Ship To ★

No address assigned

Magnet Lab Receiving

ATTN: * James Carroll Johnson

RM/FLR/STE: *

DEPT: * Procurement Services

Add to my addresses

To save this address in your profile, you can click the “Add to my addresses” for future use.

Address Line 1: 1800 E Paul Dirac Dr

Address Line 2: Magnet Lab Receiving

City: Tallahassee

State: FL

Zip Code: 32310

★ Required fields Save Close

To save this address in your profile, you can click the "Add to my addresses box."

To save this as a default, click the "Make default" box.

Click "Save" and the address will populate the "Shipping" field.

To edit accounting information, click on the pencil icon.

The first field is the "Business Unit GL". Click the down arrow to get the value "FSU01".

*Note: The drop down will only have one value to select in this case.

The next item is Location. Click the magnifying glass.

Note: Every office/room on campus has a unique **Location**. Facilities maintains the master [Building List](#) which includes all active buildings on campus. **Locations** have the format shown above.

You can enter a partial value in the Value field (i.e. "0223") and then click the Search button. This will bring up all Locations that start with 0223.

You could also enter a phrase in the Description field (i.e. "Mag Lab") and then click the Filter button. This will bring up all Locations that have the phrase "Mag Lab" in them.

HELPFUL TIP

Entering your room number in the **Description** field may prove to be the quickest way to finding your **Location**.

Type in part of your building name and click "Filter".

| Value ↑ | Description | |
|------------|--------------------------------|---|
| 0022A0100 | MAG LAB - GENERAL SCIENCA0100 | + |
| 0022A0100A | MAG LAB - GENERAL SCIENCA0100A | + |
| 0022A0100B | MAG LAB - GENERAL SCIENCA0100B | + |
| 0022A0100C | MAG LAB - GENERAL SCIENCA0100C | + |
| 0022A0100D | MAG LAB - GENERAL SCIENCA0100D | + |
| 0022A0100F | MAG LAB - GENERAL SCIENCA0100F | + |
| 0022A0101 | MAG LAB - GENERAL SCIENCA0101 | + |

Click the "+" sign to add the location.

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

From there, click on the arrow in the Dept ID field.

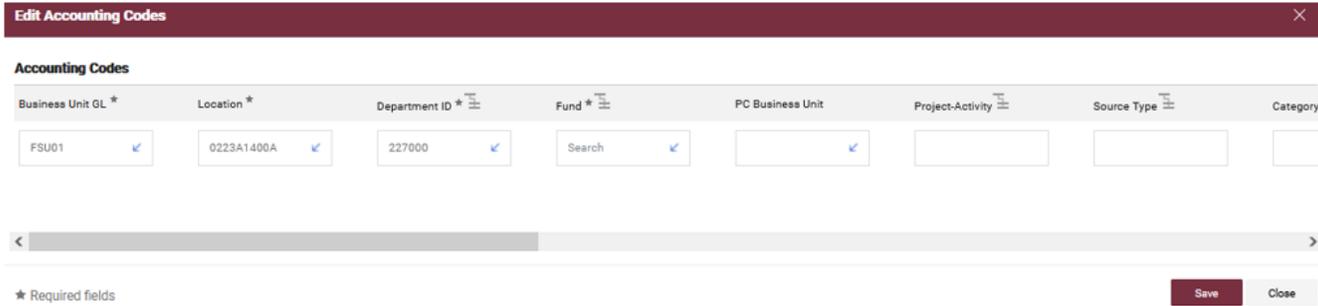
From there, click the search link, then enter your Dept ID OR search by description and click "Filter".

| Value ↑ | Description | |
|---------|--------------------------------|---|
| 001000 | President's Office | + |
| 001001 | President's Office Overhead | + |
| 001002 | President's Office Vending | + |
| 001003 | President's Teaching Awards | + |
| 001004 | President's Faculty Awards | + |
| 001005 | President's Investment Earning | + |
| 001006 | Pres Incentive-Efficiency Pgm | + |

All locations with the search description used will come up as choices. Select a choice by clicking the "+" button to the right of the location.

The system will take you back to the page and populate the field.

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



Edit Accounting Codes

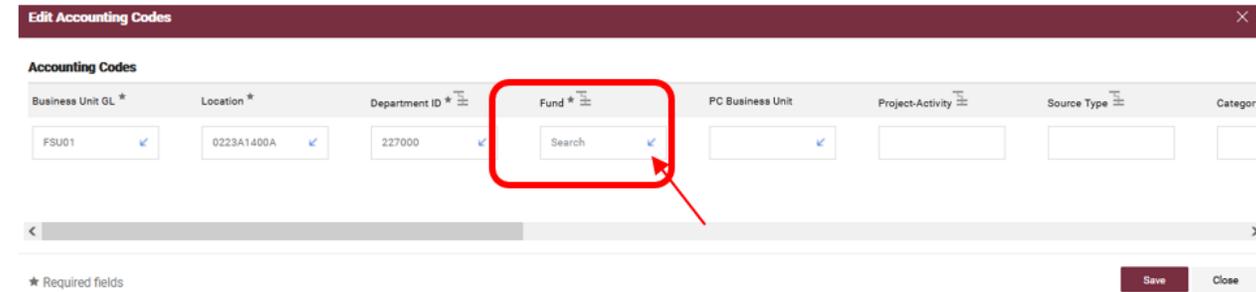
Accounting Codes

| Business Unit GL * | Location * | Department ID * | Fund * | PC Business Unit | Project-Activity | Source Type | Category |
|--------------------|------------|-----------------|--------|------------------|------------------|-------------|----------|
| FSU01 | 0223A1400A | 227000 | Search | | | | |

★ Required fields

Save Close

To select a Fund code, click the “down arrow” in the field or enter a search for a particular fund code or by description.



Edit Accounting Codes

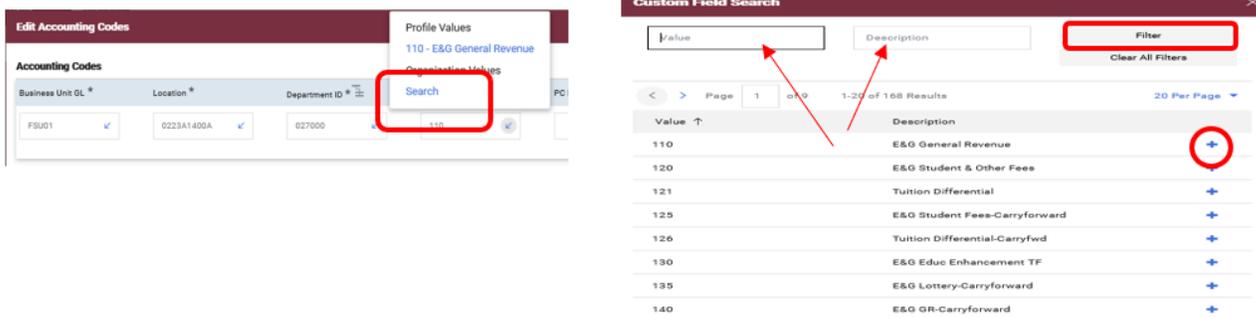
Accounting Codes

| Business Unit GL * | Location * | Department ID * | Fund * | PC Business Unit | Project-Activity | Source Type | Category |
|--------------------|------------|-----------------|--------|------------------|------------------|-------------|----------|
| FSU01 | 0223A1400A | 227000 | Search | | | | |

★ Required fields

Save Close

To select a Fund code, click the “Search” link and enter the value or description and click “Filter.” To select a fund, click the “+” next to the appropriate fund code.



Edit Accounting Codes

Accounting Codes

| Business Unit GL * | Location * | Department ID * | Fund * | PC Business Unit | Project-Activity | Source Type | Category |
|--------------------|------------|-----------------|--------|------------------|------------------|-------------|----------|
| FSU01 | 0223A1400A | 027000 | Search | | | | |

Profile Values
110 - E&G General Revenue

Custom Field Search

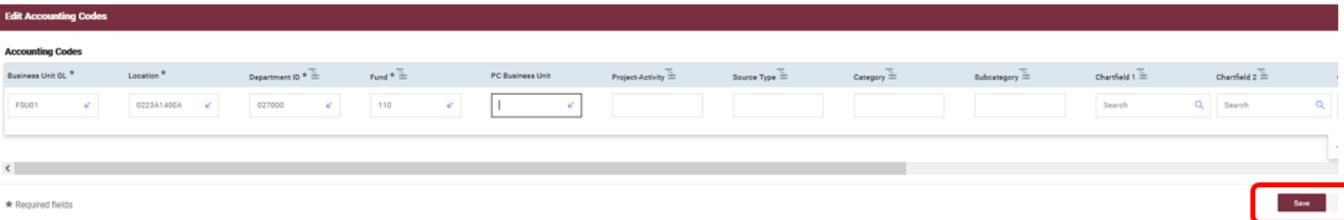
Value Description Filter

Clear All Filters

Page 1 of 9 1-20 of 168 Results 20 Per Page

| Value ↑ | Description | |
|---------|-------------------------------|---|
| 110 | E&G General Revenue | + |
| 120 | E&G Student & Other Fees | + |
| 121 | Tuition Differential | + |
| 125 | E&G Student Fees-Carryforward | + |
| 126 | Tuition Differential-Carryfwd | + |
| 130 | E&G Educ Enhancement TF | + |
| 135 | E&G Lottery-Carryforward | + |
| 140 | E&G GR-Carryforward | + |

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.



Edit Accounting Codes

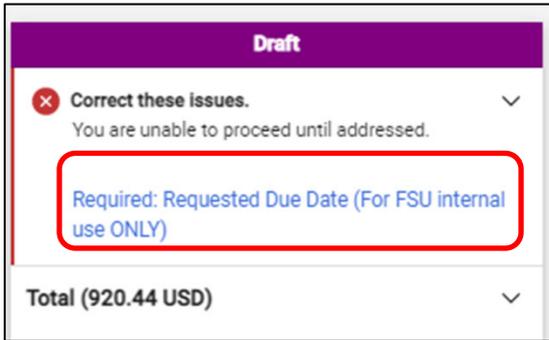
Accounting Codes

| Business Unit GL * | Location * | Department ID * | Fund * | PC Business Unit | Project-Activity | Source Type | Category | Subcategory | Chartfield 1 | Chartfield 2 |
|--------------------|------------|-----------------|--------|------------------|------------------|-------------|----------|-------------|--------------|--------------|
| FSU01 | 0223A1400A | 027000 | 110 | | | | | | Search | Search |

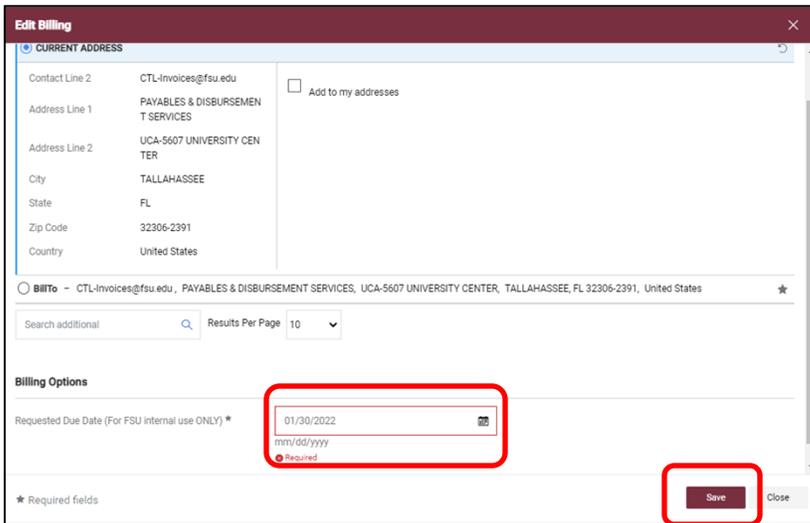
★ Required fields

Save

The next step is entering the “Due Date.” You will need to click on “Required: Requested Due Date.”



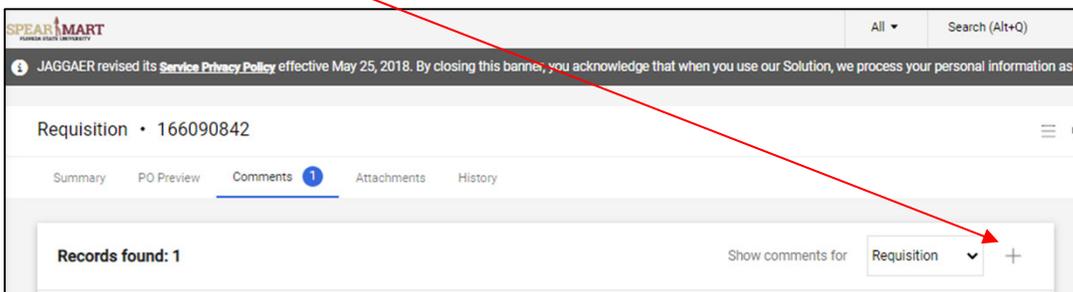
Enter your due date in this field and then click save.



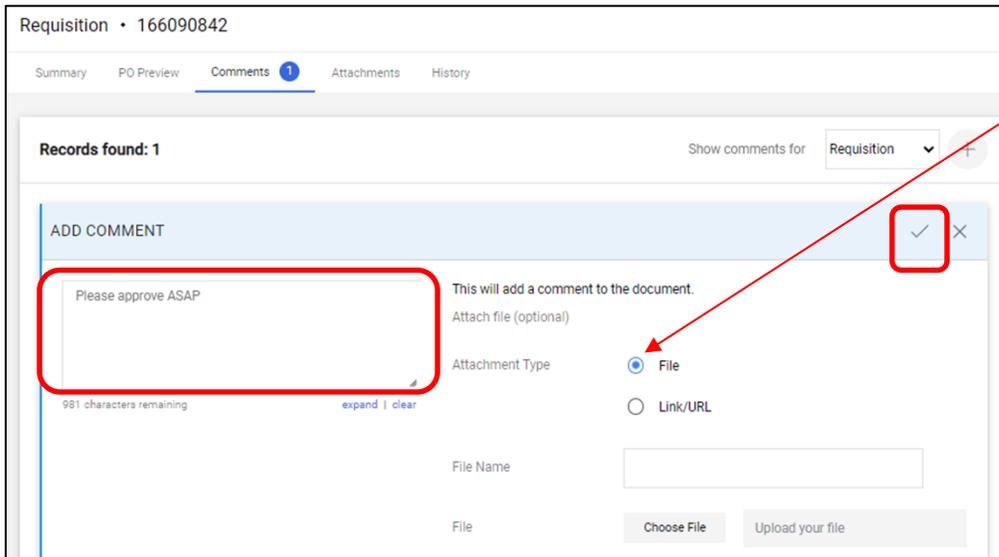
If there is any additional information you would like to provide to an approver, you can add it by clicking on the comments tab.



To add comments, click the “+” sign.



Add your comments and click the check mark. You also have the option to add attachments by selecting "Choose File" and navigating to the document that you wish to attach. You may also create a name for the attachment. After you have entered the necessary comments and/or attached any necessary documents, click the check mark.



Requisition • 166090842

Summary PO Preview **Comments 1** Attachments History

Records found: 1 Show comments for Requisition

ADD COMMENT

Please approve ASAP

This will add a comment to the document.

Attach file (optional)

Attachment Type

File

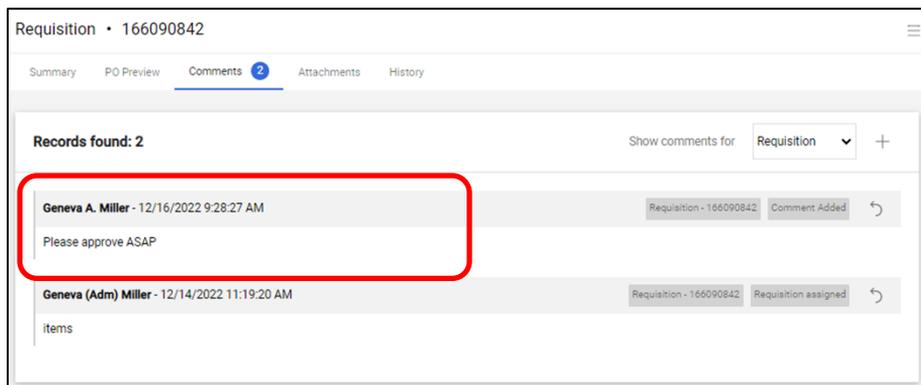
Link/URL

File Name

File

Choose File Upload your file

Once checked, your comment will be added to the requisition.



Requisition • 166090842

Summary PO Preview **Comments 2** Attachments History

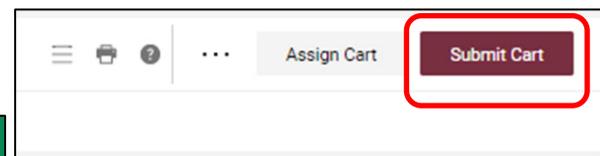
Records found: 2 Show comments for Requisition

Geneva A. Miller - 12/16/2022 9:28:27 AM

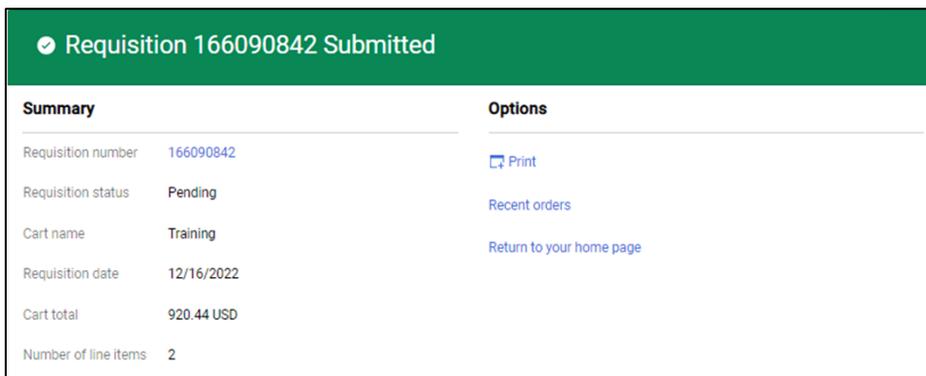
Please approve ASAP

Geneva (Adm) Miller - 12/14/2022 11:19:20 AM

Now you are ready to submit your order. Select the Submit Cart button.



Assign Cart **Submit Cart**



✓ Requisition 166090842 Submitted

| Summary | Options |
|-------------------------------|--|
| Requisition number: 166090842 | Print |
| Requisition status: Pending | Recent orders |
| Cart name: Training | Return to your home page |
| Requisition date: 12/16/2022 | |
| Cart total: 920.44 USD | |
| Number of line items: 2 | |

You now see confirmation that your requisition has been submitted and a Requisition Summary with your requisition number.