

## Introduction and Sign On

### Overview

In AIS, Planned Purchase Orders (PPOs) are established to address frequent purchases from the same supplier. These are distinguished from Standard Purchase Orders (SPOs) that make distinct purchases from a single supplier.

Department Buyers are staff in the University's departments/units that are authorized to submit Releases against PPOs. Most Department Buyers are also authorized to approve those Releases.

The Department Buyer responsibility allows you to retrieve and review SPOs and PPOs; enter a Release against a PPO, approve the Release, if you have approval authority; and respond to Notifications.

If the Department Buyer is not authorized to approve the Release, they must forward it to the appropriate Fiscal Officer or Delegate for approval.

- Departments/Units may request the establishment of PPOs. PPOs allow the department/unit to procure goods/services from the same supplier over time. For example, PPOs may be established to pay monthly lease costs to a specific supplier or purchase books from the same bookseller over many months.
  - Departmental staff submits a purchase requisition to their fiscal officer, requesting the PPO.
  - The fiscal officer approves the requisition, and forwards it to the campus' Purchasing Office.
  - The Purchasing Office establishes the PPO and assigns it a unique PPO number.
  - As goods/services are required, a Department Buyer places "orders", referencing the PPO number, directly with the designated supplier.
  - The Department Buyer will then input a release (i.e., "Scheduled Release") directly into AIS against the appropriate PPO, using the unique PPO number.

**NOTE:** Departmental funds are encumbered as soon as the PPO is established. PPOs, while functional, are relatively cumbersome to use. Unless numerous purchases to the same supplier are anticipated over a period of time, departments/units should simply use purchase requisitions as needs arise.

### Objectives

After completing the Department Buyer Unit, the user will be able to:

- Use AIS's Purchase order Summary function to search for and review existing purchase orders.
- Enter Scheduled Releases against PPOs.
- Add Attachments to Scheduled Releases.
- Approve Scheduled Releases or forward them to an authorized user for approval.
- Issue Change Orders (Revisions) against Scheduled Releases.
- Calculate the remaining balance of existing PPOs.
- Query and review Notifications, respond to Notifications and maintain the Notification Summary.

### Login

Navigate to the AIS Production Login page.

- Enter your Username and Password.
- Click Login or press Enter on your keyboard. Your Oracle Applications Home Page opens.
- From the Main Menu, select the responsibility SIU Department Buyer. The link expands to show the nested functions.
- Click on the appropriate function to access a form or web-based application.