**The Pennsylvania State University**



**SIMBA Hands-On Guide**

**PR14\_Purchasing Documents - Advanced Search**



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# PR14\_Purchasing Documents - Advanced Search

## Overview

**Transaction Description:**

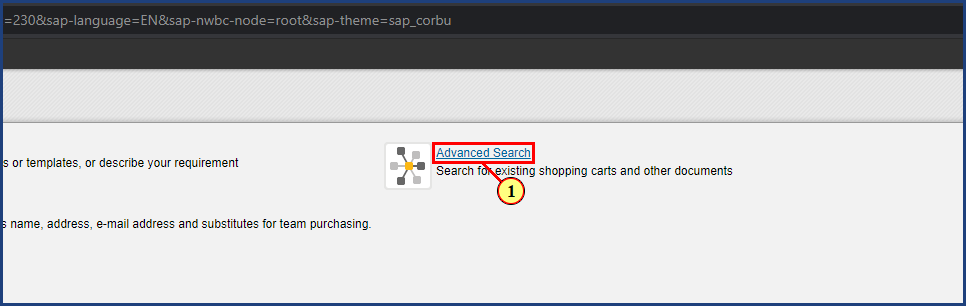
This transaction allows document search capabilities using advanced search in Shop OnLion.

**Penn State Purpose:**

This transaction is used by Shoppers, Buyers, and Goods Recipients to locate purchasing documents such as shopping cart and purchase orders.

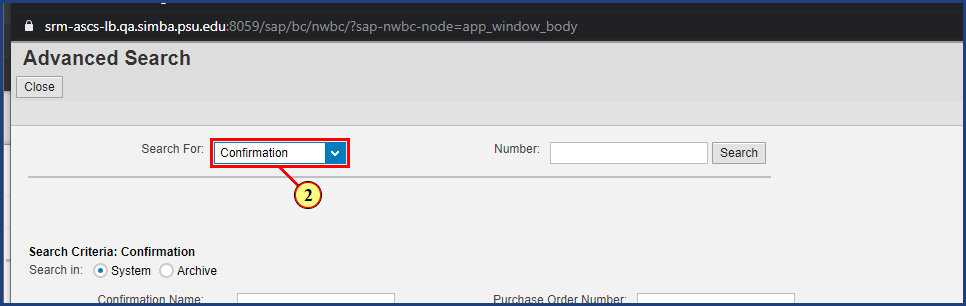
## Process Steps

### Home - Google Chrome



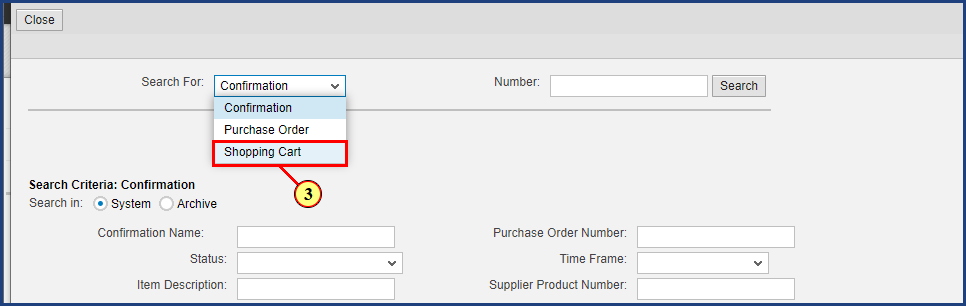
| Step | Action |
| --- | --- |
|  | The advanced search option is utilized to search for various documents by selecting a series of specific parameters. The following examples will demonstrate the steps in searching for a shopping cart, and searching for purchase order by vendor. |
| 1. | The **Advanced Search** button is clicked. |

### Advanced Search - Google Chrome



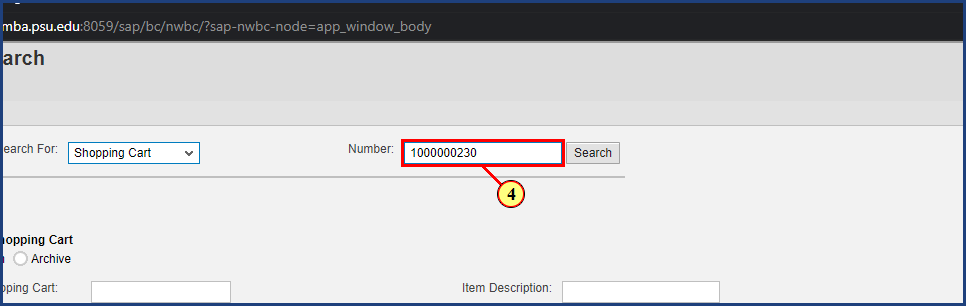
| Step | Action |
| --- | --- |
|  | Select the parameter from the Search For dropdown. For this exercise we are selecting Shopping Cart. |
| 2. | The **Search For** dropdown is clicked. |

### Advanced Search - Google Chrome



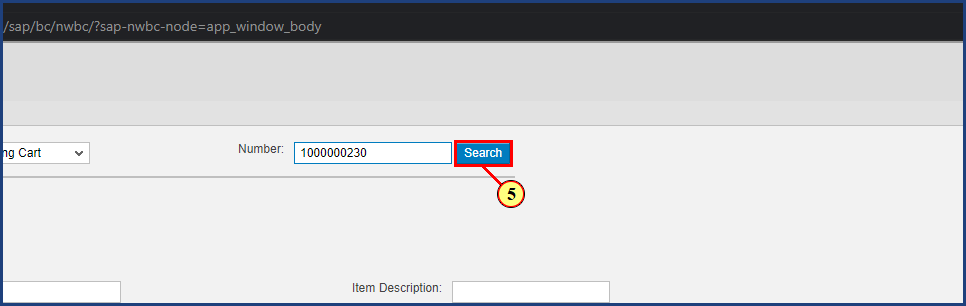
| Step | Action |
| --- | --- |
| 3. | The **Shopping Cart** menu item is clicked. |

### Advanced Search - Google Chrome



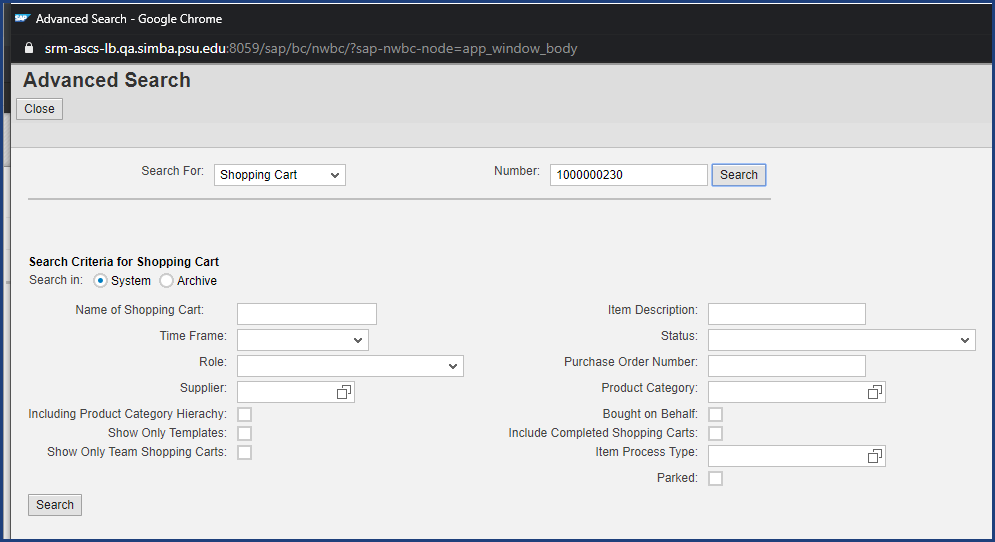
| Step | Action |
| --- | --- |
|  | Enter the number for the particular shopping cart you are searching for. |
| 4. | **1000000230** is typed into the **Number** field. |

### Advanced Search - Google Chrome



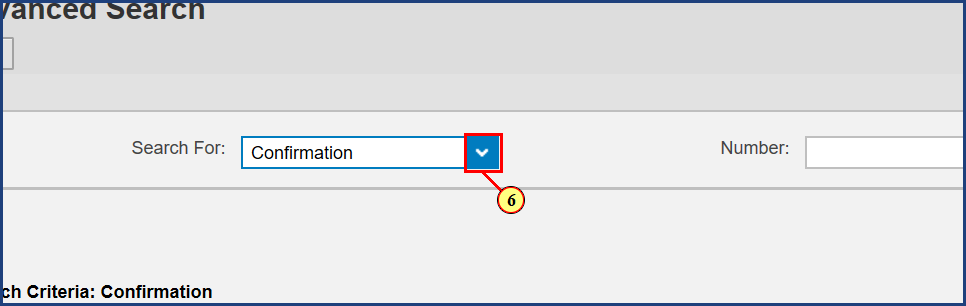
| Step | Action |
| --- | --- |
|  | Click Search and the shopping cart number you’ve entered will open in a new window. |
| 5. | The **Search** button is clicked. |

### Advanced Search - Google Chrome



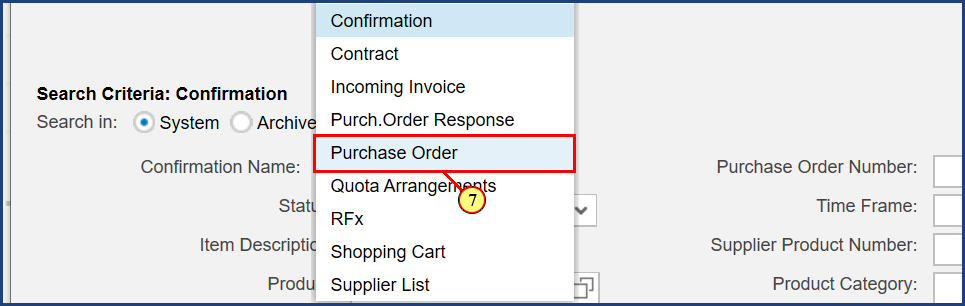
| Step | Action |
| --- | --- |
|  | The Advanced Search options can be combined to search in powerful ways. A range of search criteria, such as Number and Name of the document, can be used to search for various documents, depending on the user's assigned role. Depending on the type of document you want to search (for example, purchase orders), the search parameters change dynamically. For example, if in the Search For field you select Purchase Order, the system only displays parameters related to Purchase Orders. We will now demonstrate the advanced search option for purchase orders for a specific vendor, in a specified timeframe. |

### Advanced Search ‎- Microsoft Edge



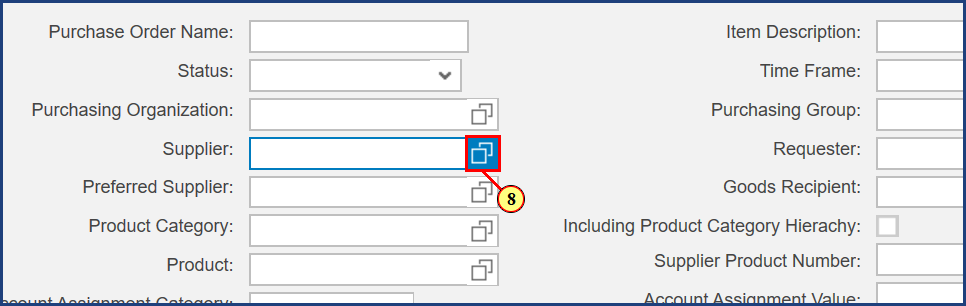
| Step | Action |
| --- | --- |
| 6. | The **Search For** dropdown is clicked. |

### Advanced Search ‎- Microsoft Edge



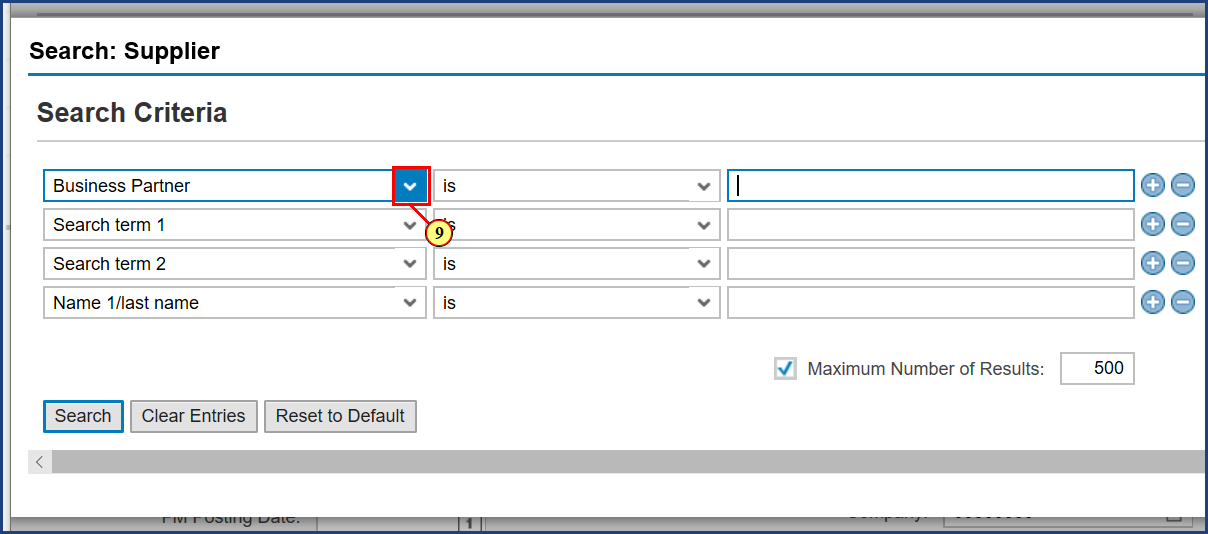
| Step | Action |
| --- | --- |
| 7. | The **Purchase Order** menu item is clicked. |

### Advanced Search ‎- Microsoft Edge



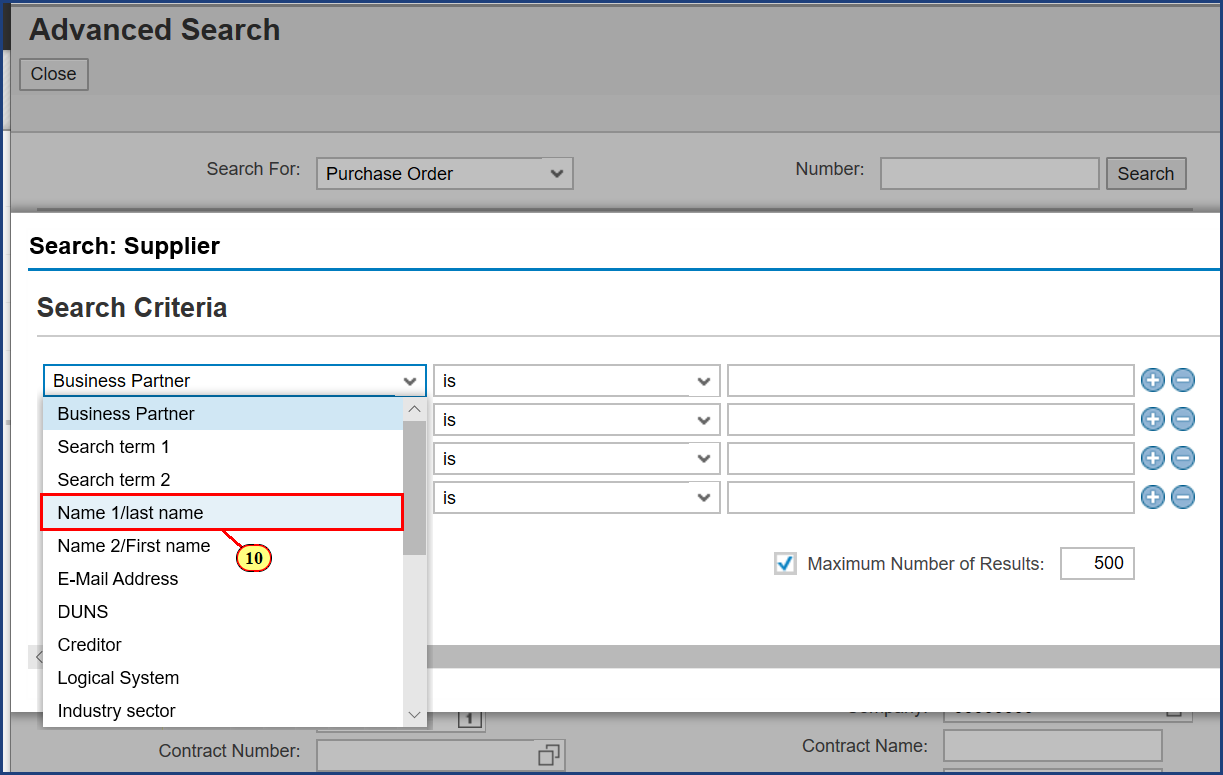
| Step | Action |
| --- | --- |
| 8. | The **Possible Values** button is clicked. |

### Advanced Search ‎- Microsoft Edge



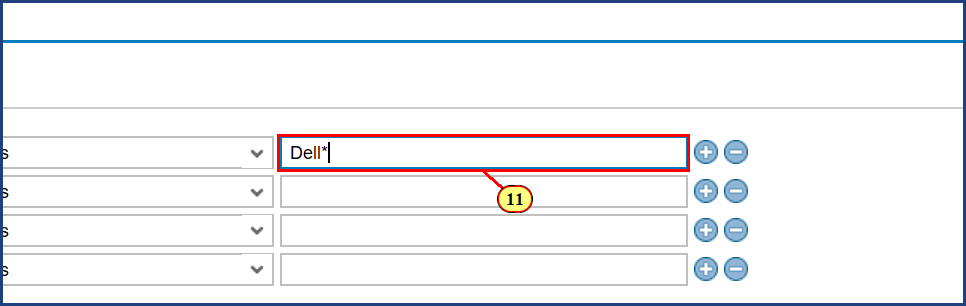
| Step | Action |
| --- | --- |
| 9. | The dropdown is clicked. |

### Advanced Search ‎- Microsoft Edge



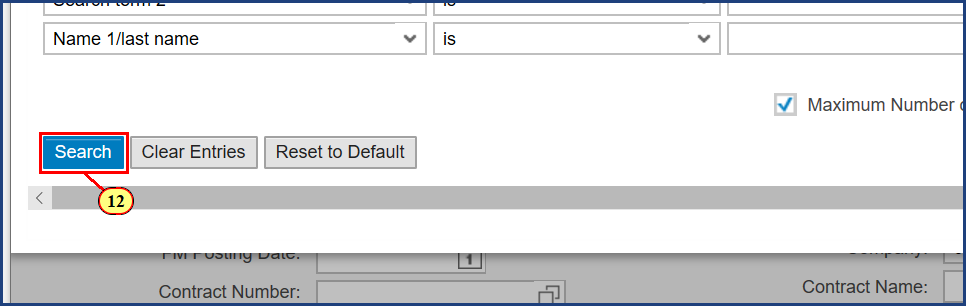
| Step | Action |
| --- | --- |
| 10. | The **Name 1/last name** menu item is clicked. |

### Advanced Search ‎- Microsoft Edge



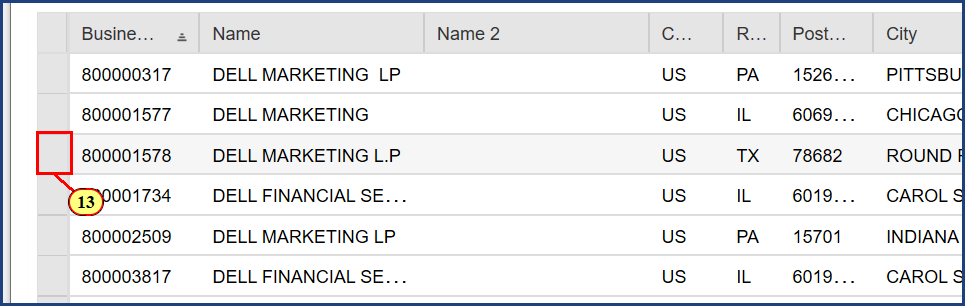
| Step | Action |
| --- | --- |
| 11. | **Dell\*** is typed into the **Name 1/last name** field. |

### Advanced Search ‎- Microsoft Edge



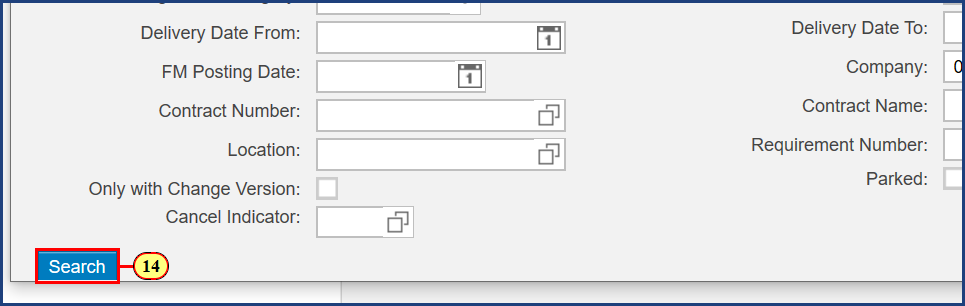
| Step | Action |
| --- | --- |
| 12. | The **Search** button is clicked. |

### Advanced Search ‎- Microsoft Edge



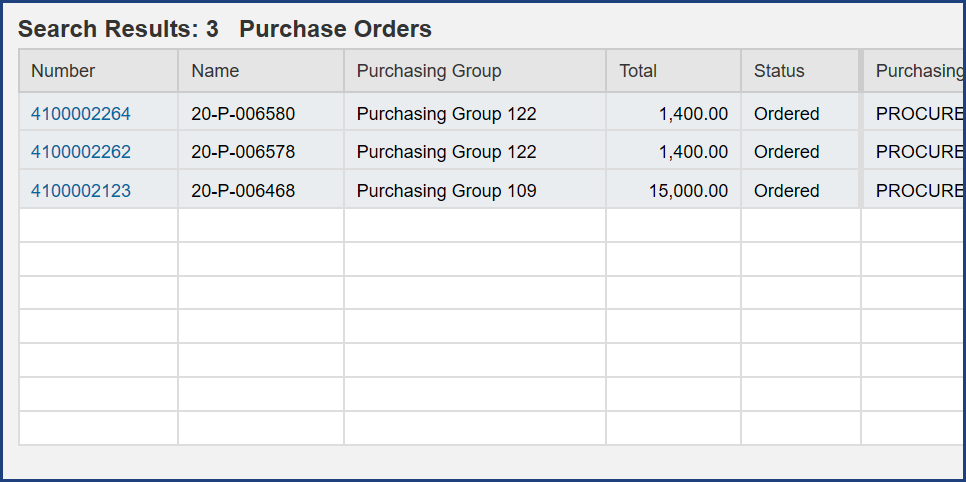
| Step | Action |
| --- | --- |
| 13. | The line selection button is clicked. |

### Advanced Search ‎- Microsoft Edge



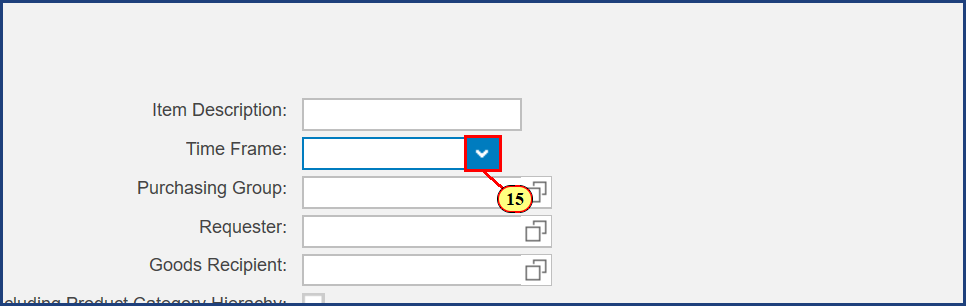
| Step | Action |
| --- | --- |
| 14. | The **Search** button is clicked. |

### Advanced Search ‎- Microsoft Edge



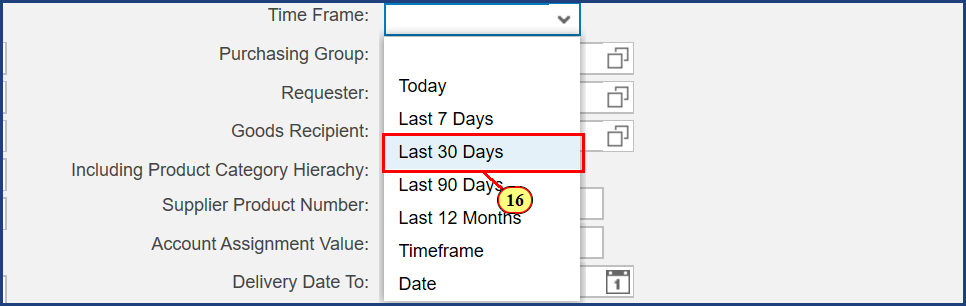
| Step | Action |
| --- | --- |
|  | Search results will display purchase orders for that supplier. |

### Advanced Search ‎- Microsoft Edge



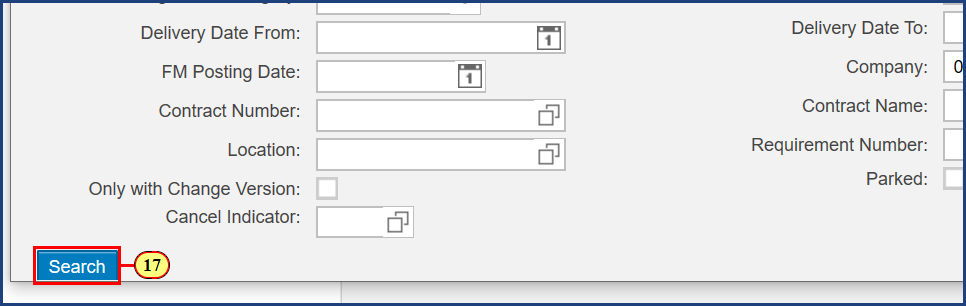
| Step | Action |
| --- | --- |
| 15. | The **Time Frame** dropdown is clicked. |

### Advanced Search ‎- Microsoft Edge



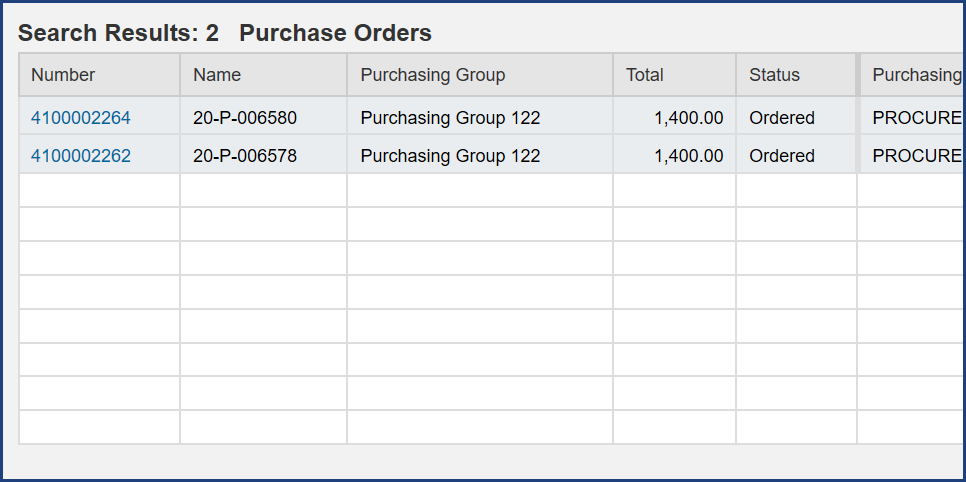
| Step | Action |
| --- | --- |
| 16. | The **Last 30 Days** menu item is clicked. |

### Advanced Search ‎- Microsoft Edge



| Step | Action |
| --- | --- |
| 17. | The **Search** button is clicked. |

### Advanced Search ‎- Microsoft Edge



| Step | Action |
| --- | --- |
|  | Search results will display purchase orders within selected time frame. |

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