

	<ul> <li>PeopleSoft Search Framework functionality uses Elasticsearch, an open-source search engine, to provide PeopleSoft users a way of performing searches both within a specific category (module) or across all categories, based on the module(s) enabled and user's assigned security.</li> <li>The Elasticsearch search option provides users expanded searchability for casting a focused or broad search based on how individual agencies, colleges, and users input meaningful data based on how they use the system. Search criteria could be a known transaction id, a keyword that describes a transaction (ex. status, date, or dollar amount), or word(s) known to be input in fields on a transaction (ex. item description or requisition name). Once a search is performed, the result set can be further modified by either specifying additional search criteria or applying filters.</li> </ul>
	Elasticsearch provides two search method options:
	<ul> <li>Global Search (performed from the Homepage or enabled module pages), or</li> <li>Keyword Search (performed only from an enabled module page)</li> </ul>
	<b>TGM modules eProcurement (Requisitions) and Supplier Contracts have this functionality enabled.</b> SAO Financials also enabled the Asset Management & General Ledger modules. Therefore, a Global search can return transactional data related to a search from one or more of these modules while Keyword Search results will be limited to module-specific data based on where the search is initiated.
	This Quick Reference Guide is intended, specifically, for providing guidance on how to perform a Keyword Search for eProcurement Requisitions and Supplier Contracts data.
1.	Where a Keyword Search can be performed in TGM Modules.
	The Keyword Search tab will appear on both pages (shown below):



Co	ontract Entry
Ent	ter any information you have and click Search. Leave fields blank for a list of all values.
	Eind an Existing Value Add a New Value
N * !	lote: Keyword Search will return results last updated 7 days ago (02/19/2023 7:36:15PM) Search Criteria
Ke	ywords
	Search Basic Search Advanced Search
Th	ne eProcurement > Manage Requisitions page:
М	lanage Requisitions
E	Requisition Search Keyword Search
5	Search Requisitions
	Keyword Search Tips
	Keyword Search will return results last updated 5 day ago (02/21/2023 10:24:34 AM). Search Show Advanced Search
Fc illu eF	or purposes of this job aid, the eProcurement module is used, primarily, for ustration purposes. However, keyword search functionality works the same in Procurement & Supplier Contracts modules.
2. <b>Na</b>	avigate to Manage Requisitions page to perform a Keyword Search.
	<ul> <li>Any navigation method can be used, for example, either through:</li> </ul>
	<ul> <li>Homepage &gt; Procurement tile &gt; Procurement WorkCenter &gt; Manag Requisitions link, or through the Navigator option</li> </ul>
	<ul> <li>'Navigator' 2 &gt; Navigator &gt; eProcurement &gt; Manage</li> </ul>



3.	For purposes of this example, navigation through the <b>Procurement</b> tile was used. Once on the Procurement WorkCenter, click the <b>Manage Requisitions</b> hyperlink.
	Click on the <b>Keyword Search</b> tab located next to the Requisition Search tab.
	Procurement WorkCente     Main     Requisition     Procurement     Procurement     Requisition     Requisition ID     Requisition ID <t< th=""></t<>
4.	<ul> <li>The Keyword Search page includes the following:</li> <li>A timeline for which your search should produce results (highlighted in yellow, below). Indexing (updating) of search records will occur nightly to ensure up-to-date data is returned by Global and Keyword searches.</li> </ul>
	<ul> <li>Keyword field for inputting search value(s) to be searched.</li> <li>Search Tips provides suggestions on how best to specify your search keyword(s) based on information available to search with.</li> <li>Show Advanced Search is used to access pre-set search criteria options.</li> </ul>
	Screen shots of the Keyword Search page showing these options is provided, below



Search Requisitions	rch					
Keyword Keyword Search will r Search	eturn results last updated 1 Show Advanced Search	17 day ago (01/25/2023 10:45	5:39 PM).	Search Tips		
		Search Tips Phrases: Us example: "yu All Words: U results. (For Any Words: example: 'ye Partial String document* documentar	e double quotes (" ear-end report") Ise an ampersand example: docume Use a pipe (I) to sp par-end report"   reg gs: Use an asterisk would return words y, documentation)	(&) to specify that ((&) to specify that (mts & reports) pecify that any wor port) (<(*) to search for p beginning with do	hat make up a phr all words must app d must appear in t artial strings. (For cument, such as d	Help ase. (For near in the ne results. (For example: occuments,
	+	Return				
Advanced See	rch Criter	ia options:				
Auvanceu Sea		•				
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*Search Contains: Business Unit:	All v	of the following search field	is entered:	٩		
*Search Contains: Business Unit: Business Unit Description:	All v = v [contains phrase v]	of the following search field	is entered:	Q.		
*Search Contains: Business Unit: Business Unit Description: Budget Status - NonProrated:	All   V     =   V     [   Contains phrase     V   [	of the following search field	is entered:	Q		
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*Search Contains: Business Unit Business Unit Description: Budget Status - NonProrated: Budget Status - Prorated: Origin:	All     V       =     V       contains phrase     V       =     V       contains phrase     V       contains phrase     V	of the following search field	is entered:	Q		
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*Search Contains: Business Unit Business Unit Description: Budget Status - NonProrated: Budget Status - Prorated: Origin: Requester: Requester Name: Beguieting Date:	All     V       =     V       contains phrase     V       =     V       contains phrase     V	of the following search field	s entered:	Q		
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*Search Contains: Business Unit Description: Budget Status - NonProrated: Budget Status - NonProrated: Budget Status - Prorated: Origin: Requester Name: Requisition Date: Requisition ID: Requisition Name:	All     V       =     V       contains phrase     V       =     V       contains phrase     V       contains phrase     V       contains phrase     V       (contains phrase     V	of the following search field	is entered:	a		
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Advanced Sea *Search Contains: Business Unit Business Unit Description: Budget Status - NonProrated: Budget Status - NonProrated: Budget Status - NonProrated: Grigin: Requester Name: Requisition Date: Requisition Name: Requisition Name: Requisition Name: Requisition Status: Buyer Name: Category Code: Category Description Category Des	All V = V (contains phrase V = V (contains phrase V) (contains phrase V (contains phrase V) (contains	of the following search field	s entered:	for multi	ple searc	h values.



	<ul> <li>a term (XCONTRACT) believed to exist on the Requisition we want to find (ex. this value can exist anywhere on the Requisition, including the Requisition Name field, line description, or in requisition comments)</li> <li>a Requester or userid ID believed to be associated with the requisition (ex. actual Requester ID, user that entered req, or userid simply mentioned anywhere in the req (ANNGILLIO)</li> <li>a specific Requisition Origin, either the actual origin for the req, the origin number mentioned anywhere on the req, or just a number believed to be included in the req you want to find (154)</li> </ul>
	Click Search once all search values are entered in the Keyword field.      Manage Requisitions      Requisition Search Keyword Search      Search Requisitions      Keyword XCONTRACT & ANNGILLIO & 154      Keyword Search will return results last updated 6 day ago (02/21/2023 10:24:34 AM).      Search Show Advanced Search
6.	Viewing & Interpreting Keyword Search Results. Search results are viewable directly from the Keyword search page and total results can be determined by the number in parentheses next to the Business Unit 'Filter by' option:



<ul> <li>search Requisitions</li> </ul>								
Keyword XCONTRACT & ANNGILI	LIO & 154			Search Tips				
Keyword Search will retur	rn results last updated	d 6 day ago (02/21/2023 10:24:34	4 AM).					
Search	how Advanced Searc	h						
Filter by	Requisitions (	2)						
Business Unit 41400 (13)	To view the lifespa To edit or perform	an and line items for a requisition, another action on a requisition, r	click the nake a se	Expand triangle icon. lection from the Action dropdown list	and click Go.			
Requisition Date	Req ID 0000043223	Requisition Name XCONTRACT 154 AMEND	BU 41400	Date Request State 11/21/2022 Approved	Budget Not Chk'd	Total 0.00	[Select Action]	
2022 (13)	)	Bra		44400000 Des Fee		0.00	[Select Action]	
Requester Name	P 0000043199	Meeti	41400	11/16/2022 Pending	NOT CRK d	0.00		
Ann Gillio 404/895-6915 (13)	0000043165	XCONTRACT 154 Amend AV	41400	11/14/2022 Approved	Not Chk'd	0.00	[Select Action]	_
Budget Checking Header Status Not Budget Checked (10)	0000042354	XCONTRACT 154 Amen	41400	08/23/2022 Approved	Not Chk'd	0.00	[Select Action]	_
Valid (3)	0000042258	XCONTRACT 154 Renew	41400	08/16/2022 Approved	Not Chk'd	0.00	[Select Action]	_
Supplier Name	0000041379	MGS	41400	05/09/2022 Complete	Valid	85 000 01	[Select Action]	
(2) CORAL HOSPITALITY GA LLC		new	41400	03/03/2022 Complete	Valid	00,000.01	[Colord Artical]	
GOODWILL INDUSTRI(2)	0000041196	XCONTRACT 154 Great Wol	41400	04/26/2022 Approved	Not Chk'd	0.00	[Select Action]	_
CLASSIC CENTER AUTHORITY	0000041156	XCONTRACT 154 Military	41400	04/21/2022 Partially Received	Valid	36,800.00	[Select Action]	_
(1) COX ENTERPRISES INC (1)	▶ 0000041034	XCONTRACT 154 OAC GOODW	41400	04/13/2022 Approved	Not Chk'd	0.00	[Select Action]	_
Wore	0000040922	XCONTRACT 162 AJC Subsc	41400	04/07/2022 Approved	Valid	107.88	[Select Action]	_
Approved (11)	0000040765	XCONTRACT 154 Renewal	41400	03/24/2022 Approved	Not Chk'd	0.00	[Select Action]	_
Complete (1) Pending Approval (1)	0000040525	XCONTRACT 154 renewal	41400	03/02/2022 Approved	Not Chk'd	0.00	[Select Action]	_
· · · · · · · · · · · · · · · · · · ·	0000040061	3 XCONTRACT 154 Classic	41400	01/13/2022 Approved	Not Chk'd	0.00	[Select Action]	_
How to Apply F Further refineme specifyin Advance	ilters o ent of ke g additi ed Sear	n search re eyword searc onal criteria ch', or	<b>sul</b> ch r usii	<b>ts.</b> esults can be ng specific se	e perfor earch fie	med by elds in tl	either: he ' <b>Show</b>	,



	Keyword XCONTRACT & ANNGILL	0 &	154				Search Tips				
	Keyword Search will return	n resu	ults last updated	6 day ago (02/21/2023 10:24:34	AM).						
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	Business Unit 41400 (13)	To To	view the lifespa edit or perform	n and line items for a requisition, another action on a requisition, r	click the l nake a se	Expand triangl lection from th	e icon. e Action dropdown list	and click Go.			
			Req ID	Requisition Name	BU	Date	Request State	Budget	Total		
L	2022 (13)	P	0000043223	XCONTRACT 154 AMEND Bra	41400	11/21/2022	Approved	Not Chk'd	0.00	[Select Action]	
	Requester Name	P	0000043199	XCONTRACT 154 UGA Meeti	41400	11/16/2022	Pending	Not Chk'd	0.00	[Select Action]	
	Ann Gillio 404/895-6915 (13)	Þ	0000043165	XCONTRACT 154 Amend AV	41400	11/14/2022	Approved	Not Chk'd	0.00	[Select Action]	
	Budget Checking Header Status Not Budget Checked (10)	Þ	0000042354	XCONTRACT 154 Amen Good	41400	08/23/2022	Approved	Not Chk'd	0.00	[Select Action]	
	Valid (3)	Þ	0000042258	XCONTRACT 154 Renew	41400	08/16/2022	Approved	Not Chk'd	0.00	[Select Action]	
	Supplier Name CORAL HOSPITALITY GA LLC	Þ	0000041379	XCONTRACT 014 Renew-	41400	05/09/2022	Complete	Valid	85,000.01	[Select Action]	
(2	) GOODWILL INDUSTRI <mark>(2</mark> )	Þ	0000041196	XCONTRACT 154 Great	41400	04/26/2022	Approved	Not Chk'd	0.00	[Select Action]	
L	UNIVERSITY OF GEORGIA (2) CLASSIC CENTER AUTHORITY	Þ	0000041156	XCONTRACT 154 Military	41400	04/21/2022	Partially Received	Valid	36,800.00	[Select Action]	
(1	) COX ENTERPRISES INC (1)	Þ	0000041034	XCONTRACT 154 OAC GOODW	41400	04/13/2022	Approved	Not Chk'd	0.00	[Select Action]	
	More	₽	0000040922	XCONTRACT 162 AJC Subsc	41400	04/07/2022	Approved	Valid	107.88	[Select Action]	
	Requisition Status Approved (11)	Þ	0000040765	XCONTRACT 154 Renewal C	41400	03/24/2022	Approved	Not Chk'd	0.00	[Select Action]	
	Complete (1) Pending Approval (1)	Þ	0000040525	XCONTRACT 154 renewal 3	41400	03/02/2022	Approved	Not Chk'd	0.00	[Select Action]	
Ŀ		₽	0000040061	XCONTRACT 154 Classic	41400	01/13/2022	Approved	Not Chk'd	0.00	[Select Action]	

• the 'Budget Checking Header Status' – Not Budget Checked (10)

Note that the total result set with this single filter applied now only shows:

- (10) for the Business Unit
- the 'Budget Checking Header Status' is no longer an active link since it's been applied as a filter, and
- the 'Not Budget checked filter appears at the top of the search results to indicate this status filter is already applied to the result set ...



💌 Search Requisit	Keyword Search						
Keyword XCON	TRACT & ANNGILLI	O & 154				Search Tips	
Keywo	ord Search will return	results last update	d 6 dav ago (02/21/2023 10:24:3	4 AM).			
Search	Sh	ow Advanced Searc	sh sh				
Elle - ha	,	Not Budget Chec	ked 🗵 🕴 Clear All Filters				
Filter by		Requisitions @					
Business Unit 41400 (10)	L	To view the lifespa To edit or perform	n and line items for a requisition, another action on a requisition, n	click the E nake a sel	Expand triangle ection from the	e icon. e Action dropdown list	t and click Go.
		Req ID	Requisition Name	BU	Date	Request State	Budget
Requisition Date 2022 (10)		0000043223	XCONTRACT 154 AMEND Bra	41400	11/21/2022	Approved	Not Chk'd
Requester Name		• 0000043199	XCONTRACT 154 UGA Meeti	41400	11/16/2022	Pending	Not Chk'd
Ann Gillio 404/	895-6915 (10)	▶ 0000043165	XCONTRACT 154 Amend AV	41400	11/14/2022	Approved	Not Chk'd
	Header Status	▶ 0000042354	XCONTRACT 154 Amen	41400	08/23/2022	Approved	Not Chk'd



Using Elasticsearch: Performing a Keyword Search for eProcurement & Supplier Contracts data

Requisition Search Keyword Search	h										
<ul> <li>Search Requisitions</li> </ul>											
Kaussand VCONTRACT & ANNOL	1110.8	154				Court Tree					
Keyword ACONTRACT & ANNU		104				Search Tips					
Keyword Search will ret	turn res	ults last update	d 6 day ago (02/21/2023 10:24:3	4 AM).							
Search	Show A	dvanced Searc	h								
	Not	Budget Chec	ked 🗵 Clear All Filters								
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41400 (10)	To	view the lifespa edit or perform	n and line items for a requisition, another action on a requisition. r	click the E nake a sel	Expand triangle ection from the	e icon. e Action dropdown I	list and click Go.				
		Reg ID	Requisition Name	BU	Date	Request State	Budget	Total			
Requisition Date	►	0000043223	XCONTRACT 154 AMEND	41400	11/21/2022	Approved	Not Chk'd	0.00	[Select Action]	~	Go
2022 (10)			Bra						[Coloct Action]	24	-
Requester Name	P	0000043199	XCONTRACT 154 UGA Meeti	41400	11/16/2022	Pending	Not Chk'd	0.00			G
Ann Gillio 404/895-6915 (10)	►	0000043165	XCONTRACT 154 Amend AV	41400	11/14/2022	Approved	Not Chk'd	0.00	[Select Action]	~	G
Budget Checking Header Status									TO all and the firm of		_
Not Budget Checked (10)	Þ	0000042354	XCONTRACT 154 Amen Good	41400	08/23/2022	Approved	Not Chk'd	0.00	[[Select Action]		G
	Þ	0000042258	XCONTRACT 154 Renew	41400	08/16/2022	Approved	Not Chk'd	0.00	[Select Action]	~	G
Supplier Name CORAL HOSPITALITY GALLC			MGS								
(2)	₽	0000041196	XCONTRACT 154 Great	41400	04/26/2022	Approved	Not Chk'd	0.00	[[Select Action]	~	Go
GOODWILL INDUSTRI(2)	- F	0000041034	XCONTRACT 154 OAC	41400	04/13/2022	Approved	Not Chk'd	0.00	[Select Action]	~	Go
UNIVERSITY OF GEORGIA (2) CLASSIC CENTER AUTHORIT	Y		GOODW					0.00			
(1)	►	0000040765	XCONTRACT 154 Renewal	41400	03/24/2022	Approved	Not Chk'd	0.00	[Select Action]	~	Go
GREAT WOLF RESORTS INC		0000040525	VCONTRACT 154 renewal	41400	03/02/2022	Approved	Not Chk'd	0.00	[Select Action]	¥	Gr
	P	0000040525	3	41400	03/02/2022	Abbioved	NOT CHK'O	0.00	( <u>1</u>		00
(1) More		0000040061	XCONTRACT 154 Classic	41400	01/13/2022	Approved	Not Chk'd	0.00	[Select Action]	~	Go
(1) More		0000040001									

Note that the total result set with both filters applied now reflects only the 1 Req applicable to both filters and:

- Both filters applied now appear at the top of the results
- Both filters applied no longer appear as active hyperlinks once applied

Counch Dominitions	h								
Search Requisitions									
Keyword XCONTRACT & ANNGI	LLIO & 154				Search Tips				
Keyword Search will ref	um results last update	d 6 day ago (02/21/2023 10:24	4:34 AM).						
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	Requisitions ?		_						
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41400 (1)	Req ID	Requisition Name	BU	Date	Request State	Budget	Total		
Requisition Date 2022 (1)	Req ID 0000043199	Requisition Name XCONTRACT 154 UGA Meeti	BU 41400	Date 11/16/2022	Request State Pending	Budget Not Chk'd	Total 0.00	[Select Action]	❤ Go
A1400 (1) Requisition Date 2022 (1) Requester Name	Req ID 0000043199	Requisition Name XCONTRACT 154 UGA Meeti	BU 41400	Date 11/16/2022	Request State Pending	Budget Not Chk'd	Total 0.00	[[Select Action]	Go
41400 (1) Requisition Date 2022 (1) Requester Name Ann Gillio 404/895-6915 (1)	Req ID 0000043199	Requisition Name XCONTRACT 154 UGA Meeti	BU 41400	Date 11/16/2022	Request State Pending	Budget Not Chk'd	Total 0.00	[Select Action]	Go
41400 (1) Requisition Date 2022 (1) Requester Name Ann Gillo 404/895-6915 (1) Budget Checking Header Status Not Budget Checked (1)	Req ID 0000043199 Create New Requis	Requisition Name XCONTRACT 154 UGA Meeti	BU 41400	Date 11/16/2022	Request State Pending Review Change	Budget Not Chk'd	Total 0.00 Manage Receipts	[[Select Action] Requisition Report	Go



•	Removing Active Filters to restore original search results.
	For this example, only the 'Pending Approval' filter was removed which expanded the result set to include all (10) transactions having a 'Not Budget Checked' status.
	<ul> <li>Individual filters can be removed by clicking the React to each filter, or</li> </ul>
	All filters can be removed, simultaneously, by clicking the Clear All Filters link.
	Just as application of a filter will reduce results, removal of filters expands results, thereby restoring results visible prior to application of a filter. Once all filters are removed, the original/full result set is restored.
•	<b>Removing Filters:</b> For this example, only the 'Pending Approval' filter was removed which expanded the
	<ul> <li>Individual filters can be removed by clicking the Reactions having a Not Budget Checked status.</li> <li>Individual filters can be removed by clicking the Reaction of the Reaction of the All filters can be removed, simultaneously, by clicking the Reaction of th</li></ul>
	<ul> <li>Individual filters can be removed by clicking the next to each filter, or</li> <li>All filters can be removed, simultaneously, by clicking the clear All Filters link.</li> </ul>
	<ul> <li>Individual filters can be removed by clicking the next to each filter, or</li> <li>All filters can be removed, simultaneously, by clicking the clear All Filters link.</li> </ul>
	<ul> <li>Individual filters can be removed by clicking the next to each filter, or</li> <li>All filters can be removed, simultaneously, by clicking the clear All Filters link.</li> </ul>
	<ul> <li>Individual filters can be removed by clicking the next to each filter, or</li> <li>All filters can be removed, simultaneously, by clicking the clear All Filters link.</li> </ul>



Business Unit	To view the life	span and line items for a requisition	n, click the Ex	xpand triangle	icon.	a field and all the field			
41400 (10)	Req ID	rm another action on a requisition, Requisition Name	BU BU	ction from the Date	Request State	Budget	Total		
Requisition Date 2022 (10)	00000432	23 XCONTRACT 154 AMEND	41400	11/21/2022	Approved	Not Chk'd	0.00	[Select Action]	
Requester Name	000004319	99 XCONTRACT 154 UGA	41400	11/16/2022	Pending	Not Chik'd	0.00	[Select Action]	
Ann Gillio 404/895-6915 (10)	000004310	55 XCONTRACT 154 Amend AV	/ 41400	11/14/2022	Approved	Not Chk'd	0.00	[Select Action]	
Budget Checking Header Status	00000423	54 XCONTRACT 154 Amen	41400	08/23/2022	Approved	Not Chik'd	0.00	[Select Action]	
Supplier Name	000004225	Sood S8 XCONTRACT 154 Renew	41400	08/16/2022	Approved	Not Chik'd	0.00	[Select Action]	
CORAL HOSPITALITY GA LLC	000004119	MGS 6 XCONTRACT 154 Great	41400	04/26/2022	Approved	Not Chk'd	0.00	[Select Action]	
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There are multiple options for viewing additional transaction detail or taking action on a requisition. The results page works much like the Manage Requisitions > Requisition Search tab. To drill down on a Requisition transaction, either:

- Using the 'Expand' icon next to the Requisition ID to view the Req Lifecycle and other transaction documents associated with the requisition, or
- Clicking on the Requisition ID link to be taken to the Requisition Details page which also provides info on any contract linked to the requisition, or
- Use the 'Go To' menu is also an option if you wish to take action on the req

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Requester Name	0000043165	XCONTRACT 154 Amend AV	41400	11/14/2022 Approv	ved Not Chk	'd 0.00	[Select Action]	
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Budget Checking Header Status Not Budget Checked (9)	0000042258	XCONTRACT 154 Renew MGS	41400	08/16/2022 Approv	ved Not Chk	'd 0.00	[Select Action]	
Valid (2)	0000041196	XCONTRACT 154 Great	41400	04/26/2022 Approv	ved Not Chk	'd 0.00	[Select Action]	
Supplier Name	0000041156	XCONTRACT 154 Military	41400	04/21/2022 Partially	y Received Valid	36,800.00	[Select Action]	
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• Note that the Keyword Search page defaults to the 'Basic' Search' page.
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