



Quick Reference Guide

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

	<p>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.</p> <p>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.</p> <p>Elasticsearch provides two search method options:</p> <ul style="list-style-type: none"> • Global Search (performed from the Homepage or enabled module pages), or • Keyword Search (performed only from an enabled module page) <p>TGM modules eProcurement (Requisitions) and Supplier Contracts have this functionality enabled. 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.</p> <p>This Quick Reference Guide is intended, specifically, for providing guidance on how to perform a Keyword Search for eProcurement Requisitions and Supplier Contracts data.</p>
1.	<p>Where a Keyword Search can be performed in TGM Modules.</p> <p>The Keyword Search tab will appear on both pages (shown below):</p>



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The Supplier Contracts > **Contract Entry** page:

Contract Entry

Enter any information you have and click Search. Leave fields blank for a list of all values.

Keyword Search

Note: Keyword Search will return results last updated 7 days ago (02/19/2023 7:36:15PM)

▼ **Search Criteria**

Keywords:

[Basic Search](#) [Advanced Search](#)

The eProcurement > **Manage Requisitions** page:

Manage Requisitions

Keyword Search

Search Requisitions

Keyword [Search Tips](#)

Keyword Search will return results last updated 5 day ago (02/21/2023 10:24:34 AM).

[Show Advanced Search](#)

For purposes of this job aid, the eProcurement module is used, primarily, for illustration purposes. However, keyword search functionality works the same in eProcurement & Supplier Contracts modules.

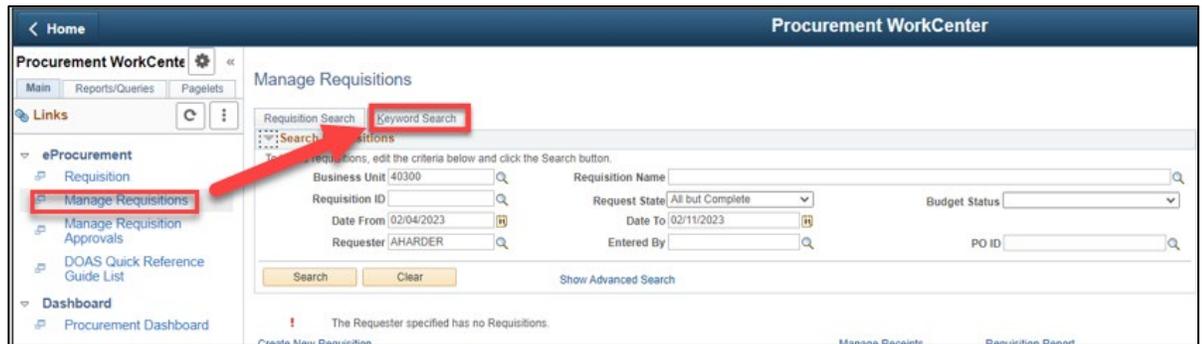
2. **Navigate to Manage Requisitions page to perform a Keyword Search.**

- Any navigation method can be used, for example, either through:
 - Homepage > Procurement tile > Procurement WorkCenter > Manage Requisitions link, or through the Navigator option
 - 'Navigator'  > Navigator  > eProcurement > Manage Requisitions

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3. For purposes of this example, navigation through the **Procurement** tile was used. Once on the Procurement WorkCenter, click the **Manage Requisitions** hyperlink. Click on the **Keyword Search** tab located next to the Requisition Search tab.



4. **The Keyword Search page includes the following:**
- 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.
 - **Keyword** field for inputting search value(s) to be searched.
 - **Search Tips** provides suggestions on how best to specify your search keyword(s) based on information available to search with.
 - **Show Advanced Search** is used to access pre-set search criteria options.
- Screen shots of the Keyword Search page showing these options is provided, below.



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Procurement WorkCenter

Manage Requisitions

Requisition Search | Keyword Search

Search Requisitions

Keyword

Search Tips

Keyword Search will return results last updated 17 day ago (01/25/2023 10:45:39 PM)

Search Show Advanced Search

Search Tips

- Phrases: Use double quotes (" ") around words that make up a phrase. (For example: "year-end report")
- All Words: Use an ampersand (&) to specify that all words must appear in the results. (For example: documents & reports)
- Any Words: Use a pipe (|) to specify that any word must appear in the results. (For example: 'year-end report' | report)
- Partial Strings: Use an asterisk (*) to search for partial strings. (For example: document* would return words beginning with document, such as documents, documentary, documentation)

Return

Advanced Search Criteria options:

*Search Contains: of the following search fields entered:

Business Unit:

Business Unit Description:

Budget Status - NonProrated:

Budget Status - Prorated:

Origin:

Requester:

Requester Name:

Requisition Date:

Requisition ID:

Requisition Name:

Requisition Status:

Buyer:

Buyer Name:

Category Code:

Category Description:

Category Description Short:

5. Performing an 'All Words' keyword search for multiple search values.

This search example will combine the following values in the Keyword field for searching on.

- First, enter all values you wish to search in the Keyword field, for this example we will search: XCONTRACT & ANNGILLIO & 154



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- 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)
- 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**))
- 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**)
- **Click Search** once all search values are entered in the Keyword field.

Manage Requisitions

Requisition Search | Keyword Search

▼ Search Requisitions

Keyword Search Tips

Keyword Search will return results last updated 6 day ago (02/21/2023 10:24:34 AM).

[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:



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Manage Requisitions

Requisition Search | Keyword Search

Search Requisitions

Keyword: XCONTRACT & ANNGILLO & 154 Search Tips

Keyword Search will return results last updated 6 day ago (02/21/2023 10:24:34 AM).

Search Show Advanced Search

Filter by

Business Unit
41400 (13)

Requisition Date
2022 (13)

Requester Name
Ann Gillio 404/895-6915 (13)

Budget Checking Header Status
Not Budget Checked (10)
Valid (3)

Supplier Name
CORAL HOSPITALITY GA LLC (2)
GOODWILL INDUSTRI... (2)
UNIVERSITY OF GEORGIA (2)
CLASSIC CENTER AUTHORITY (1)
COX ENTERPRISES INC (1)
More...

Requisition Status
Approved (11)
Complete (1)
Pending Approval (1)

Requisitions

To view the lifespan and line items for a requisition, click the Expand triangle icon. To edit or perform another action on a requisition, make a selection from the Action dropdown list and click Go.

Req ID	Requisition Name	BU	Date	Request State	Budget	Total		
0000043223	XCONTRACT 154 AMEND Bra...	41400	11/21/2022	Approved	Not Chk'd	0.00	[Select Action]	Go
0000043199	XCONTRACT 154 UGA Meet...	41400	11/16/2022	Pending	Not Chk'd	0.00	[Select Action]	Go
0000043165	XCONTRACT 154 Amend AV ...	41400	11/14/2022	Approved	Not Chk'd	0.00	[Select Action]	Go
0000042354	XCONTRACT 154 Amen Good...	41400	08/23/2022	Approved	Not Chk'd	0.00	[Select Action]	Go
0000042258	XCONTRACT 154 Renew MGS...	41400	08/16/2022	Approved	Not Chk'd	0.00	[Select Action]	Go
0000041379	XCONTRACT 014 Renew-new...	41400	05/09/2022	Complete	Valid	85,000.01	[Select Action]	Go
0000041196	XCONTRACT 154 Great Wol...	41400	04/26/2022	Approved	Not Chk'd	0.00	[Select Action]	Go
0000041156	XCONTRACT 154 Military ...	41400	04/21/2022	Partially Received	Valid	36,800.00	[Select Action]	Go
0000041034	XCONTRACT 154 OAC GOODW...	41400	04/13/2022	Approved	Not Chk'd	0.00	[Select Action]	Go
0000040922	XCONTRACT 162 AJC Subsc...	41400	04/07/2022	Approved	Valid	107.88	[Select Action]	Go
0000040765	XCONTRACT 154 Renewal C...	41400	03/24/2022	Approved	Not Chk'd	0.00	[Select Action]	Go
0000040525	XCONTRACT 154 renewal 3...	41400	03/02/2022	Approved	Not Chk'd	0.00	[Select Action]	Go
0000040061	XCONTRACT 154 Classic C...	41400	01/13/2022	Approved	Not Chk'd	0.00	[Select Action]	Go

7. How to Apply Filters on search results.

Further refinement of keyword search results can be performed by either:

- specifying additional criteria using specific search fields in the **'Show Advanced Search'**, or
- applying one or more filters available in the **'Filter by'** section

*Note that transaction count (based on the total result set) applicable to each filter appears in parentheses next to each filter, below.



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Manage Requisitions

Requisition Search | Keyword Search

Search Requisitions

Keyword: XCONTRACT & ANNGILLO & 154 Search Tips

Keyword Search will return results last updated 6 day ago (02/21/2023 10:24:34 AM).

Search Show Advanced Search

Filter by

- Business Unit
41400 (13)
- Requisition Date
2022 (13)
- Requester Name
Ann Gillio 404/895-6915 (13)
- Budget Checking Header Status
Not Budget Checked (10)
Valid (3)
- Supplier Name
CORAL HOSPITALITY GALLC (2)
GOODWILL INDUSTRI. (2)
UNIVERSITY OF GEORGIA (2)
CLASSIC CENTER AUTHORITY (1)
COX ENTERPRISES INC (1)
More...
- Requisition Status
Approved (11)
Complete (1)
Pending Approval (1)

Requisitions

To view the lifespan and line items for a requisition, click the Expand triangle icon.
To edit or perform another action on a requisition, make a selection from the Action dropdown list and click Go.

Req ID	Requisition Name	BU	Date	Request State	Budget	Total	
▶ 0000043223	XCONTRACT 154 AMEND Bra...	41400	11/21/2022	Approved	Not Chk'd	0.00	[Select Action] Go
▶ 0000043199	XCONTRACT 154 UGA Meeti...	41400	11/16/2022	Pending	Not Chk'd	0.00	[Select Action] Go
▶ 0000043165	XCONTRACT 154 Amend AV ...	41400	11/14/2022	Approved	Not Chk'd	0.00	[Select Action] Go
▶ 0000042354	XCONTRACT 154 Amen Good...	41400	08/23/2022	Approved	Not Chk'd	0.00	[Select Action] Go
▶ 0000042258	XCONTRACT 154 Renew MGS...	41400	08/16/2022	Approved	Not Chk'd	0.00	[Select Action] Go
▶ 0000041379	XCONTRACT 014 Renew-new...	41400	05/09/2022	Complete	Valid	85,000.01	[Select Action] Go
▶ 0000041196	XCONTRACT 154 Great Wol...	41400	04/26/2022	Approved	Not Chk'd	0.00	[Select Action] Go
▶ 0000041156	XCONTRACT 154 Military ...	41400	04/21/2022	Partially Received	Valid	36,800.00	[Select Action] Go
▶ 0000041034	XCONTRACT 154 OAC GOODW...	41400	04/13/2022	Approved	Not Chk'd	0.00	[Select Action] Go
▶ 0000040922	XCONTRACT 162 AJC Subsc...	41400	04/07/2022	Approved	Valid	107.88	[Select Action] Go
▶ 0000040765	XCONTRACT 154 Renewal C...	41400	03/24/2022	Approved	Not Chk'd	0.00	[Select Action] Go
▶ 0000040525	XCONTRACT 154 renewal 3...	41400	03/02/2022	Approved	Not Chk'd	0.00	[Select Action] Go
▶ 0000040061	XCONTRACT 154 Classic C...	41400	01/13/2022	Approved	Not Chk'd	0.00	[Select Action] Go

For this example, two filters will be applied (one at a time) against the total result set by clicking filter hyperlinks in the 'Filter By' section on the left-hand side. The first filter applied will be:

- 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 ...



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Manage Requisitions

Requisition Search | Keyword Search

▼ Search Requisitions

Keyword [Search Tips](#)

Keyword Search will return results last updated 6 day ago (02/21/2023 10:24:34 AM).

[Show Advanced Search](#)

Filter by

Business Unit 41400 (10)

Requisition Date 2022 (10)

Requester Name Ann Gillio 404/895-6915 (10)

Budget Checking Header Status Not Budget Checked (10)

Not Budget Checked Clear All Filters

Requisitions [?](#)

To view the lifespan and line items for a requisition, click the Expand triangle icon.
To edit or perform another action on a requisition, make a selection from the Action dropdown list and click Go.

Req ID	Requisition Name	BU	Date	Request State	Budget
▶ 0000043223	XCONTRACT 154 AMEND Bra...	41400	11/21/2022	Approved	Not Chk'd
▶ 0000043199	XCONTRACT 154 UGA Meeti...	41400	11/16/2022	Pending	Not Chk'd
▶ 0000043165	XCONTRACT 154 Amend AV ...	41400	11/14/2022	Approved	Not Chk'd
▶ 0000042354	XCONTRACT 154 Amen Good...	41400	08/23/2022	Approved	Not Chk'd

- Now, to apply the second 'Requisition Status' – Pending Approval (1) filter, simply click the 'Pending Approval (1)' link:



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Manage Requisitions

Requisition Search | Keyword Search

Search Requisitions

Keyword: XCONTRACT & ANNGILLIO & 154 [Search Tips](#)

Keyword Search will return results last updated 6 day ago (02/21/2023 10:24:34 AM).

[Search](#) [Show Advanced Search](#)

Filter by: **Not Budget Checked** | [Clear All Filters](#)

Requisitions (?)

To view the lifespan and line items for a requisition, click the Expand triangle icon. To edit or perform another action on a requisition, make a selection from the Action dropdown list and click Go.

Req ID	Requisition Name	BU	Date	Request State	Budget	Total	
▶ 0000043223	XCONTRACT 154 AMEND Bra...	41400	11/21/2022	Approved	Not Chk'd	0.00	[Select Action] Go
▶ 0000043199	XCONTRACT 154 UGA Meetl...	41400	11/16/2022	Pending	Not Chk'd	0.00	[Select Action] Go
▶ 0000043165	XCONTRACT 154 Amend AV	41400	11/14/2022	Approved	Not Chk'd	0.00	[Select Action] Go
▶ 0000042354	XCONTRACT 154 Amen Good...	41400	08/23/2022	Approved	Not Chk'd	0.00	[Select Action] Go
▶ 0000042258	XCONTRACT 154 Renew MGS...	41400	08/16/2022	Approved	Not Chk'd	0.00	[Select Action] Go
▶ 0000041196	XCONTRACT 154 Great Wol...	41400	04/26/2022	Approved	Not Chk'd	0.00	[Select Action] Go
▶ 0000041034	XCONTRACT 154 OAC GOODW...	41400	04/13/2022	Approved	Not Chk'd	0.00	[Select Action] Go
▶ 0000040765	XCONTRACT 154 Renewal C...	41400	03/24/2022	Approved	Not Chk'd	0.00	[Select Action] Go
▶ 0000040525	XCONTRACT 154 renewal 3...	41400	03/02/2022	Approved	Not Chk'd	0.00	[Select Action] Go
▶ 0000040061	XCONTRACT 154 Classic C...	41400	01/13/2022	Approved	Not Chk'd	0.00	[Select Action] Go

Requisition Status: **Pending Approval (1)** | [Approved \(9\)](#)

[Create New Requisition](#) [Review Change Request](#) [Review Change Tracking](#) [Manage Receipts](#) [Requisition Report](#)

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

Manage Requisitions

Requisition Search | Keyword Search

Search Requisitions

Keyword: XCONTRACT & ANNGILLIO & 154 [Search Tips](#)

Keyword Search will return results last updated 6 day ago (02/21/2023 10:24:34 AM).

[Search](#) [Show Advanced Search](#)

Filter by: **Not Budget Checked** **Pending Approval** | [Clear All Filters](#)

Requisitions (?)

To view the lifespan and line items for a requisition, click the Expand triangle icon. To edit or perform another action on a requisition, make a selection from the Action dropdown list and click Go.

Req ID	Requisition Name	BU	Date	Request State	Budget	Total	
▶ 0000043199	XCONTRACT 154 UGA Meetl...	41400	11/16/2022	Pending	Not Chk'd	0.00	[Select Action] Go

Business Unit: **41400 (1)**

Requisition Date: 2022 (1)

Requester Name: Ann Gillio 404/895-6915 (1)

Budget Checking Header Status: [Create New Requisition](#) [Review Change Request](#) [Review Change Tracking](#) [Manage Receipts](#) [Requisition Report](#)

Supplier Name: UNIVERSITY OF GEORGIA (1)

Requisition Status: **Pending Approval (1)**



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8. 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.

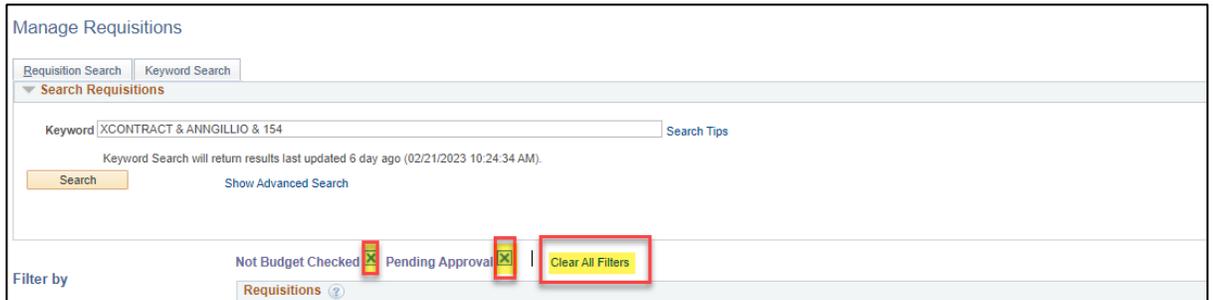
- Individual filters can be removed by clicking the  next to each filter, or
- All filters can be removed, simultaneously, by clicking the  link.

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.

9. Removing Filters:

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.

- Individual filters can be removed by clicking the  next to each filter, or
- All filters can be removed, simultaneously, by clicking the  link.



The screenshot shows the 'Manage Requisitions' interface. At the top, there are tabs for 'Requisition Search' and 'Keyword Search'. Below the tabs is a search bar with the text 'Search Requisitions'. The search bar contains the keyword 'XCONTRACT & ANNGILLIO & 154'. Below the search bar, there is a 'Search' button and a 'Show Advanced Search' link. At the bottom of the interface, there is a 'Filter by' section with two active filters: 'Not Budget Checked' and 'Pending Approval'. Each filter has a red 'X' icon next to it. To the right of the filters is a 'Clear All Filters' button, which is highlighted with a red box in the original image.

Just as application of filters reduce results, removal of filters will expand results, thereby restoring original results visible prior to application of a filter. Once all filters are removed, the original/full result set is restored.



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Filter by

- Business Unit: 41400 (10)
- Requisition Date: 2022 (10)
- Requester Name: Ann Gillo 404/895-6915 (10)
- Budget Checking Header Status: Not Budget Checked (10)
- Supplier Name: CORAL HOSPITALITY GA LLC (2), GOODWILL INDUSTRI. (2), UNIVERSITY OF GEORGIA (2), CLASSIC CENTER AUTHORITY (1), GREAT WOLF RESORTS INC (1), More...
- Requisition Status: Approved (9), Pending Approval (1)

Requisitions

To view the lifespan and line items for a requisition, click the Expand triangle icon. To edit or perform another action on a requisition, make a selection from the Action dropdown list and click Go.

Req ID	Requisition Name	BU	Date	Request State	Budget	Total	
0000043223	XCONTRACT 154 AMEND Bra...	41400	11/21/2022	Approved	Not Chk'd	0.00	[Select Action] Go
0000043199	XCONTRACT 154 UGA Meet...	41400	11/16/2022	Pending	Not Chk'd	0.00	[Select Action] Go
0000043165	XCONTRACT 154 Amend AV ...	41400	11/14/2022	Approved	Not Chk'd	0.00	[Select Action] Go
0000042354	XCONTRACT 154 Amen Good...	41400	08/23/2022	Approved	Not Chk'd	0.00	[Select Action] Go
0000042258	XCONTRACT 154 Renew MGS...	41400	08/16/2022	Approved	Not Chk'd	0.00	[Select Action] Go
0000041196	XCONTRACT 154 Great Wol...	41400	04/26/2022	Approved	Not Chk'd	0.00	[Select Action] Go
0000041034	XCONTRACT 154 OAC GOODW...	41400	04/13/2022	Approved	Not Chk'd	0.00	[Select Action] Go
0000040765	XCONTRACT 154 Renewal C...	41400	03/24/2022	Approved	Not Chk'd	0.00	[Select Action] Go
0000040525	XCONTRACT 154 renewal 3...	41400	03/02/2022	Approved	Not Chk'd	0.00	[Select Action] Go
0000040061	XCONTRACT 154 Classic C...	41400	01/13/2022	Approved	Not Chk'd	0.00	[Select Action] Go

Actions: Create New Requisition, Review Change Request, Review Change Tracking, Manage Receipts, Requisition Report

10. Refine a Keyword Search by changing, adding, or removing Keyword field values used to search.

The 'All Words' search reflects a result set returned, containing 13 total rows for the user assigned BU. This search can be modified by changing the values searched within the 'Keyword' field.

For this example, I am removing the origin, 154, to cast a wider transaction search.

Manage Requisitions

Requisition Search | Keyword Search

Search Requisitions

Keyword: XCONTRACT & ANNGILLIO & 154 [Search Tips](#)

Keyword Search will return results last updated 18 day ago (01/25/2023 10:45:39 PM).

Search | Show Advanced Search

Filter by

- Business Unit: 41400 (13)
- Requisition Date: 2022 (13)

Requisitions

To view the lifespan and line items for a requisition, click the Expand triangle icon. To edit or perform another action on a requisition, make a selection from the Action dropdown list and click Go.

Req ID	Requisition Name	BU	Date	Request State	Budget
0000043223	XCONTRACT 154 AMEND Bra...	41400	11/21/2022	Approved	Not Chk'd

Removing the '154' value and re-searching increased the result count returned to (20):



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	<p>Manage Requisitions</p> <p>Requisition Search Keyword Search</p> <p>▼ Search Requisitions</p> <p>Keyword: XCONTRACT & ANNGILLIO & Search Tips</p> <p>Keyword Search will return results last updated 18 day ago (01/25/2023 10:45:39 PM).</p> <p><input type="button" value="Search"/> <input type="button" value="Show Advanced Search"/></p> <p>Filter by</p> <p>Business Unit: 41400 (20)</p> <p>Requisition Date: 2022 (20)</p> <p>Requisitions ?</p> <p>To view the lifespan and line items for a requisition, click the Expand triangle icon. To edit or perform another action on a requisition, make a selection from the Action dropdown list and click Go.</p> <table border="1"> <thead> <tr> <th>Req ID</th> <th>Requisition Name</th> <th>BU</th> <th>Date</th> <th>Request State</th> <th>Budget</th> <th>Total</th> </tr> </thead> <tbody> <tr> <td>▶ 0000043223</td> <td>XCONTRACT 154 AMEND Bra...</td> <td>41400</td> <td>11/21/2022</td> <td>Approved</td> <td>Not Chk'd</td> <td>0.00</td> </tr> </tbody> </table>	Req ID	Requisition Name	BU	Date	Request State	Budget	Total	▶ 0000043223	XCONTRACT 154 AMEND Bra...	41400	11/21/2022	Approved	Not Chk'd	0.00
Req ID	Requisition Name	BU	Date	Request State	Budget	Total									
▶ 0000043223	XCONTRACT 154 AMEND Bra...	41400	11/21/2022	Approved	Not Chk'd	0.00									
<p>11.</p>	<p>Keyword Search results can also be refined by using the ‘Advanced Search Criteria’ option instead of using ‘Filter by’ options.</p> <p>Please note that this method is recommended when additional search criteria such as dates or statuses are necessary.</p> <p>Manage Requisitions</p> <p>Requisition Search Keyword Search</p> <p>▼ Search Requisitions</p> <p>Keyword: XCONTRACT & ANNGILLIO & Search Tips</p> <p>Keyword Search will return results last updated 18 day ago (01/25/2023 10:45:39 PM).</p> <p><input type="button" value="Search"/> <input type="button" value="Show Advanced Search"/></p> <p>Filter by</p> <p>Business Unit: 41400 (20)</p> <p>Requisition Date: 2022 (20)</p> <p>Requisitions ?</p> <p>To view the lifespan and line items for a requisition, click the Expand triangle icon. To edit or perform another action on a requisition, make a selection from the Action dropdown list and click Go.</p> <table border="1"> <thead> <tr> <th>Req ID</th> <th>Requisition Name</th> <th>BU</th> <th>Date</th> <th>Request State</th> <th>Budget</th> <th>Total</th> </tr> </thead> <tbody> <tr> <td>▶ 0000043223</td> <td>XCONTRACT 154 AMEND Bra...</td> <td>41400</td> <td>11/21/2022</td> <td>Approved</td> <td>Not Chk'd</td> <td>0.00</td> </tr> </tbody> </table>	Req ID	Requisition Name	BU	Date	Request State	Budget	Total	▶ 0000043223	XCONTRACT 154 AMEND Bra...	41400	11/21/2022	Approved	Not Chk'd	0.00
Req ID	Requisition Name	BU	Date	Request State	Budget	Total									
▶ 0000043223	XCONTRACT 154 AMEND Bra...	41400	11/21/2022	Approved	Not Chk'd	0.00									
<p>12.</p>	<p>Define additional search criteria as needed to expand or narrow search results.</p>														



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

Keyword: XCONTRACT & ANNGILLO &

Keyword Search will return results last updated 18 day ago (01/25/2023 10:45:39 PM).

*Search Contains: All of the following search fields entered:

Business Unit: = 41400

Business Unit Description: contains phrase

Budget Status - NonProrated: =

Budget Status - Prorated: =

Origin: contains phrase

Requester: contains phrase

Requester Name: contains phrase

Requisition Date: <= 6/30/2022

Requisition ID: contains phrase

Requisition Name: contains phrase

Requisition Status: = Approved

13. **Review updated result set returned based on newly added criteria.**
 Result set was reduced by applying the new criteria to narrow transaction results down to (10).

Depending upon the criteria changed, total result rows will increase or decrease. A result set can be filtered at any time.

Search Clear Hide Advanced Search

Filter by

Business Unit 41400 (10)

Requisition Date 2022 (10)

Requester Name
 Ann Gillo 404/895-6915 (7)
 Deborah Stephens ..(1)
 Geraldine Price 4. (1)
 William Cardoza 4. (1)

Budget Checking Header Status
 Not Budget Checked (5)
 Valid (5)

Supplier Name
 COX ENTERPRISES INC (2)
 ALLEN,GENNA KNOLLE (1)
 CLASSIC CENTER AUTHORITY (1)
 CORAL HOSPITALITY GALLC (1)
 GOODWILL INDUSTRI..(1)
 More...

Requisition Status Approved (10)

Requisitions ?

To view the lifespan and line items for a requisition, click the Expand triangle icon. To edit or perform another action on a requisition, make a selection from the Action dropdown list and click Go.

Req ID	Requisition Name	BU	Date	Request State	Budget	Total	
0000041630	XCONTRACT 011 Hearing O...	41400	05/27/2022	Partially Received	Valid	200,000.00	[Select Action] Go
0000041385	XCONTRACT 014 Voices of...	41400	05/09/2022	Partially Received	Valid	1,611,720.01	[Select Action] Go
0000041196	XCONTRACT 154 Great Wol...	41400	04/26/2022	Approved	Not Chk'd	0.00	[Select Action] Go
0000041156	XCONTRACT 154 Military ...	41400	04/21/2022	Partially Received	Valid	36,800.00	[Select Action] Go
0000041034	XCONTRACT 154 OAC GOODW...	41400	04/13/2022	Approved	Not Chk'd	0.00	[Select Action] Go
0000040922	XCONTRACT 162 AJC Subsc...	41400	04/07/2022	Approved	Valid	107.88	[Select Action] Go
0000040765	XCONTRACT 154 Renewal C...	41400	03/24/2022	Approved	Not Chk'd	0.00	[Select Action] Go
0000040525	XCONTRACT 154 renewal 3...	41400	03/02/2022	Approved	Not Chk'd	0.00	[Select Action] Go
0000040329	XCONTRACT 012 AJC Subsc...	41400	02/08/2022	PO(s) Dispatched	Valid	155.48	[Select Action] Go
0000040061	XCONTRACT 154 Classic C...	41400	01/13/2022	Approved	Not Chk'd	0.00	[Select Action] Go

Create New Requisition Review Change Request Review Change Tracking Manage Receipts Requisition Report

14. **How to view additional transaction details by drilling down on specific transaction results.**



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

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

Manage Requisitions

Requisition Search | Keyword Search

Search Requisitions

Keyword: XCONTRACT & ANNGILLIO & 154 Search Tips

Keyword Search will return results last updated 6 day ago (02/21/2023 10:24:34 AM).

Search Show Advanced Search

Filter by

Approved | Clear All Filters

Requisitions

To view the lifespan and line items for a requisition, click the Expand triangle icon. To edit or perform another action on a requisition, make a selection from the Action dropdown list and click Go.

Req ID	Requisition Name	BU	Date	Request State	Budget	Total		
0000043223	XCONTRACT 154 AMEND Bra...	41400	11/21/2022	Approved	Not Chk'd	0.00	[Select Action]	Go
0000043165	XCONTRACT 154 Amend AV	41400	11/14/2022	Approved	Not Chk'd	0.00	[Select Action]	Go
0000042354	XCONTRACT 154 Amen Good.	41400	08/23/2022	Approved	Not Chk'd	0.00	[Select Action]	Go
0000042258	XCONTRACT 154 Renew MGS...	41400	08/16/2022	Approved	Not Chk'd	0.00	[Select Action]	Go
0000041196	XCONTRACT 154 Great Wol...	41400	04/26/2022	Approved	Not Chk'd	0.00	[Select Action]	Go
0000041156	XCONTRACT 154 Military ...	41400	04/21/2022	Partially Received	Valid	36,800.00	[Select Action]	Go

Requester: Ann Gillio 404/895-6915 Entered By: Ann Gillio 404/895-6915 Priority: Medium

Request Lifecycle: Requisition | Approvals | Inventory | Purchase Orders | Change Request | Receiving | Returns | Invoice | Payment

Request Lifespan: Line Information

Line	ePro Special Request Item	MOA for Military Mentors	Partially Received	Price	Quantity	UOM	Supplier
1		MOA for Military Mentors	Partially Received	36,800.00000 USD	1.0000	LOT	OFFICE OF PLANNING & BUDGET

Important: When drilling down on a Requisition transaction, currently, to return to your search result set for further analysis, filtering, or drilling down on other transactions, use the browser 'Back' ← button. Typically, use of this action is not recommended, however, it has been found to be the most efficient way to return to keyword search results.



Quick Reference Guide

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15. Additional Keyword Search Tips:

- Amount values and dates can be input in the keyword search field – do not use \$

Manage Requisitions

Requisition Search | Keyword Search

Search Requisitions

Keyword Search Tips

Keyword Search will return results last updated 6 day ago (02/21/2023 10:24:34 AM).

Search Show Advanced Search

Filter by

Requisitions ?

To view the lifespan and line items for a requisition, click the Expand triangle icon.
To edit or perform another action on a requisition, make a selection from the Action dropdown list and click Go.

Req ID	Requisition Name	BU	Date	Request State	Budget	Total
▶ 0000014164	0000014164	47500	01/13/2023	Pending	Valid	71.88
▶ 0000000458	USA Today Digital Sub Year	92700	10/14/2022	Approved	Valid	71.88

- Dates can be searched – suggest using dashes (not slashes)

Manage Requisitions

Requisition Search | Keyword Search

Search Requisitions

Keyword Search Tips

Keyword Search will return results last updated 6 day ago (02/21/2023 10:24:34 AM).

Search Show Advanced Search

Filter by

Requisitions ?

To view the lifespan and line items for a requisition, click the Expand triangle icon.
To edit or perform another action on a requisition, make a selection from the Action dropdown list and click Go.

Req ID	Requisition Name	BU	Date	Request State	Budget	Total
▶ 0000192042	261-SWCM-Canon-1/13/2023	44100	01/13/2023	Open	Not Chk'd	14,518.90
▶ 0000149582	324 APPA T. GRIGSBY	46100	01/13/2023	PO(s) Created	Valid	310.00

- These and other special values can be defined as criteria for potentially more accurate results by, first, performing a basic search to obtain a set of results, then using the 'Advanced Search' options to specify amount and date criteria in actual amount/date fields

16. Sample keyword search in the Supplier Contracts module.

- Navigate to the Contract Entry page.
- Click on 'Keyword Search' tab or link as shown.



Quick Reference Guide

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

- Note that the Keyword Search page defaults to the 'Basic' Search' page.

The screenshot shows the 'Contract Entry' page with a navigation bar at the top containing a '< Home' link. Below the navigation bar, the page title 'Contract Entry' is displayed. A sub-header reads: 'Enter any information you have and click Search. Leave fields blank for a list of all values.' Below this, there are three buttons: 'Find an Existing Value', 'Keyword Search' (highlighted in yellow), and 'Add a New Value'. A note states: 'Note: Keyword Search will return results last updated 7 days ago (02/19/2023 7:36:15PM)'. Underneath, there is a section titled 'Search Criteria' with a dropdown arrow. A text input field labeled 'Keywords' contains the text '%99999%SPD%'. Below the input field, there are three links: 'Search' (a blue button), 'Basic Search' (a blue link highlighted with a red border), and 'Advanced Search' (a blue link). At the bottom of the page, there are three links: 'Find an Existing Value', 'Keyword Search' (highlighted in yellow), and 'Add a New Value'.

- The 'Advanced Search' link can be selected to allow you to reveal many fields to allow you to define additional search criteria.

This screenshot is identical to the one above, showing the 'Contract Entry' page. The 'Keyword Search' button is highlighted in yellow. In this version, the 'Advanced Search' link is highlighted with a red border, while the 'Basic Search' link is no longer highlighted.



Quick Reference Guide

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

- On the Advanced Search page, scroll down to see all search fields available, along with options for Clearing all search criteria defined in the fields, returning to the 'Basic Search' page and the 'Search' action button.

Tip! After specifying Advanced Search criteria, clicking the 'Basic Search' link will remove all criteria fields and, therefore, allow for easier viewing of your search results.

Contract Entry

Enter any information you have and click Search. Leave fields blank for a list of all values.

Note: Keyword Search will return results last updated 7 days ago (02/19/2023 7:36:15PM)

▼ **Search Criteria**

Keywords

=

Contract ID contains

Contract Version =

Version Status =

Punchout Pricing Option:

Correct History

17. **How to View, Filter, and Drill Down on Supplier Contract results.**

These actions are performed exactly as outlined in the steps, above, for eProcurement Requisition keyword searches. However, please note that to access a specific contract, you will need to click on the 'SetID – STATE' hyperlink.



Quick Reference Guide

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

Contract Entry

Enter any information you have and click Search. Leave fields blank for a list of all values.

Note: Keyword Search will return results last updated 7 days ago (02/19/2023 7:36:15PM)

▼ **Search Criteria**

Keywords:

Search by: =

Correct History

Search Results

Filter by

SetID

STATE (916)

Contract Begin Date

2023 (3)
2022 (48)
2021 (148)
2020 (64)
2019 (56)
More...

Supplier Name

Note: Keyword Search will return results last updated 7 days ago (02/19/2023 7:36:15PM)

View as:

[View All](#)

SetID	Contract ID	Contract Version	Version Status	Contract Process Option	Supplier ID	Short Supplier Name	Supplier Name
STATE	42700-361-0000102070	1	Current	General	(blank)	IBM-001	IBM CORPORATION
STATE	42700-361-0000102423	1	Current	General	(blank)	SHIINTERNA-001	SHI INTERNATIONAL CORP
STATE	42700-361-0000104189	1	Current	General	(blank)	SHIINTERNA-001	SHI INTERNATIONAL CORP
STATE	42700-361-0000105388	1	Current	General	(blank)	SHIINTERNA-001	SHI INTERNATIONAL CORP

Important: To return to Supplier Contract results after drilling down on a specific contract, unlike with requisitions, use the **'Return to Search'** option button at the bottom of the Contract Entry page.

18. **Congratulations!** You have completed Using Elasticsearch - Keyword Search for eProcurement and Supplier Contracts.