



Using Elastic Search Global Search for Procurement

PeopleSoft Search Framework functionality uses Elastic Search, 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.

The Elastic Search 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.

Elastic Search provides two search method options:

- **Global Search** (performed from the Homepage or enabled module pages), or
- **Keyword Search** (performed from an enabled module page)

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.

This Job Aid is intended, specifically, for providing guidance on performing a **Global Search of the Purchasing/Procurement category** for ePro Requisition & Supplier Contracts data.

Step	Action
1.	To perform a Global Search from the Homepage, begin by clicking the Magnifying Glass icon in the upper right corner of the homepage.



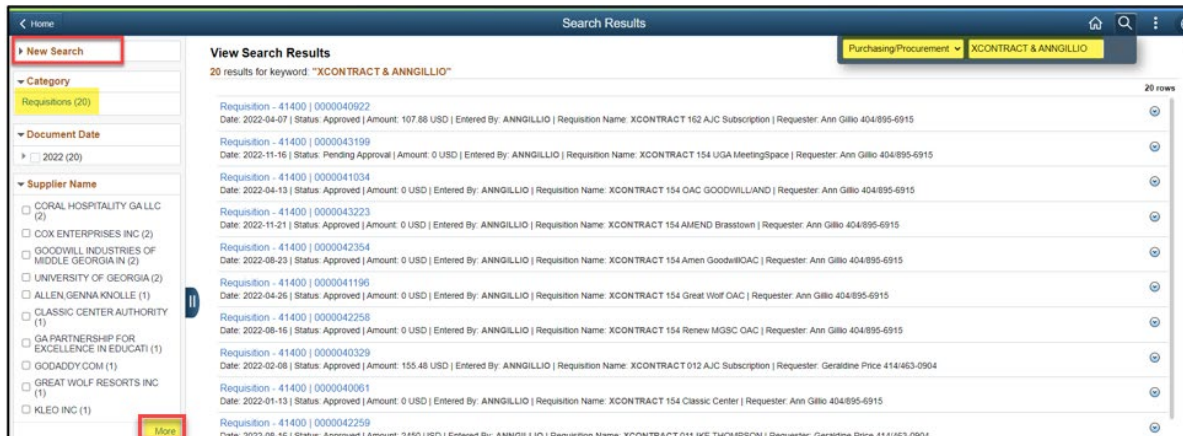
Step	Action
2.	<p>Initiate a homepage Global Search by:</p> <ul style="list-style-type: none"> • Clicking the Category drop-down menu & selecting ‘Purchasing/Procurement’ to search eProcurement Requisition & Supplier Contracts related data. • Specify value(s) you want to search in the search field. • Click the right arrow beside the search field to initiate the search action. <p>For purposes of this search, criteria for a ‘Requestor ID & Supplier’ is specified.</p>



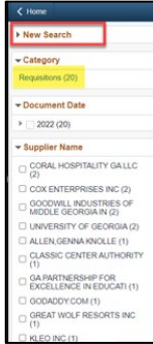
Using Elastic Search Global Search for Procurement



Step	Action
3.	<p>Review Search Results</p> <p>The result set returned by the search consists of 20 total result rows. The user has several options, including:</p> <ul style="list-style-type: none"> • Select & view individual transactions returned using hyperlinks. • Apply filters to further narrow down or focus results by selecting checkboxes next to filters (ex. Supplier Name). • Click the ‘More’ hyperlink to view additional filter options to apply. <p>Each of these actions are explored further, below.</p>

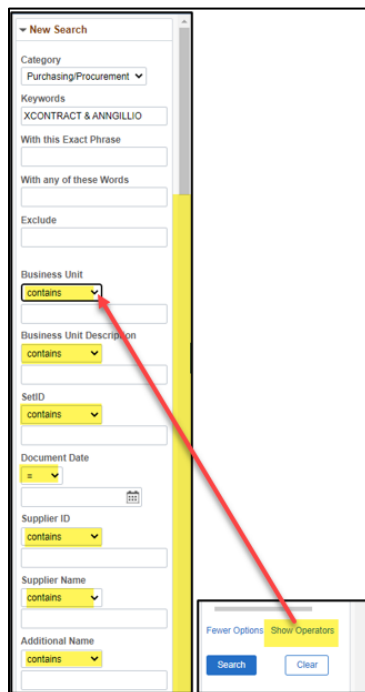


Using Elastic Search Global Search for Procurement

Step	Action
4.	<p>Search criteria can be modified by expanding the ‘New Search’ section of the search results. This is the method for defining search criteria such as transaction statuses or date criteria.</p> 

The New Search section provides pre-defined fields for easily specifying additional search criteria. Scroll all the way to the bottom of this list to find the ‘Show Operators’ option.

This option allows additional flexibility of the search fields by allowing use of operators when specifying new search criteria.





Using Elastic Search Global Search for Procurement

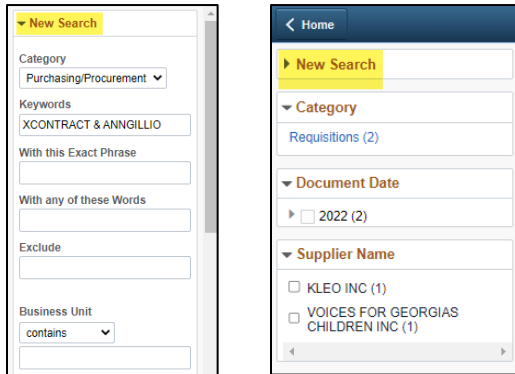
Step	Action
5.	For purposes of this example, additional ‘Origin = 014’ criteria was included. Once added, scroll down to the bottom of all criteria options and click ‘Search’ to re-initiate the Global Search.

Step	Action
6.	Results returned after the new Origin criteria is included, reduces the result set to only 2 transactions.

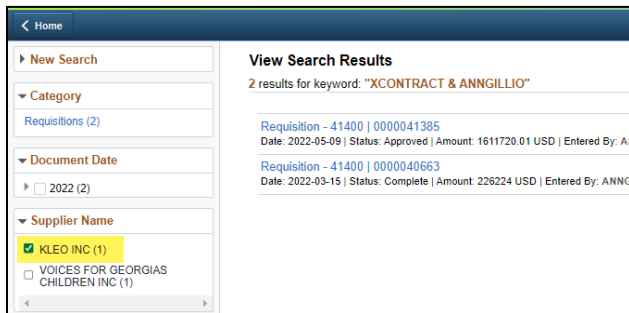
Step	Action
7.	To view filters available for applying to the result set returned, scroll back up to the top of the left side criteria bar and minimize the ‘New Search’ section. Minimizing will return visibility to filter options for further filtering results, if needed.



Using Elastic Search Global Search for Procurement



Step	Action
8.	Applying Filters on Global Search Results. For this example, a Supplier Name filter was applied to only view the (1) Requisition for KLEO INC.

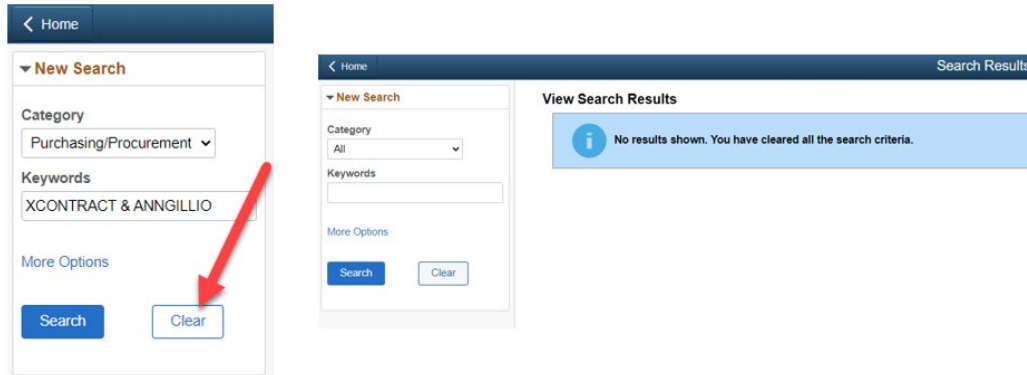


Step	Action
9.	Viewing filtered Global Search results. In Step 8, the Supplier Kelo Inc was clicked to filter the results. The Search Results will display the requisition for that supplier.

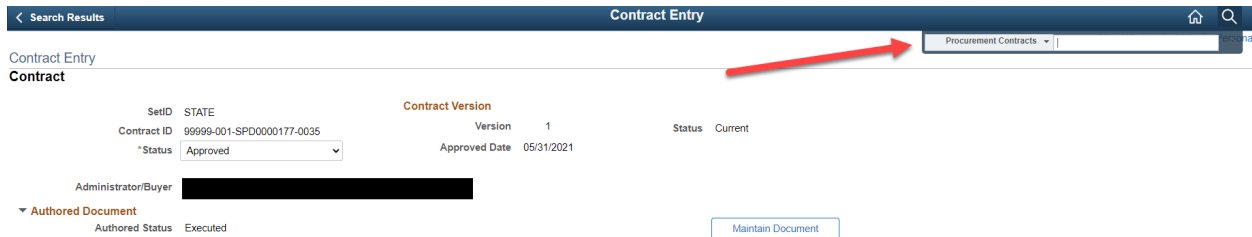


Using Elastic Search Global Search for Procurement

Step	Action
10.	<p>Removing filters from Global Search results.</p> <p>If you click on New Search, you can remove the any filters that were applied to go back to start a new search. Click on New Search and click on the Clear button. This will clear your search results so that you can perform a new search.</p>



Step	Action
11.	<p>Performing a Global Search from an enabled module page.</p> <p>A Global Search can also be performed when you in an enabled module. In this example, if you are in the Supplier Contracts module on a Contract Header page, you can click on the magnifying glass and enter search criteria that applies to contracts.</p>



Step	Action
12.	<p>The Category defaults to the module that you are in. Specify value(s) you want to search in the search field. Click the right arrow beside the sear field to initiate the search action. For this example, enter Supplier ID 0000015689.</p>





Using Elastic Search Global Search for Procurement

Step	Action
13.	In the Contract module, this supplier has multiple Supplier Contracts which will display in the search results.

< Search Results
Contract Entry

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 3 days ago (02/19/2023 7:36:15PM)

Search Criteria

Search Results

Filter by

SetID

STATE (96)

Contract Begin Date

2022 (10)
2021 (1)
2020 (2)
2019 (2)
2018 (6)
More...

Supplier Name

DELL MARKETING LP (96)

Buyer Name

Mississippi State (17)

Note: Keyword Search will return results last updated 3 days ago (02/19/2023 7:36:15PM)

View as: ☰ ☰

1 2 3 4 5 6 ... 10

[Contract - STATE | 44000-120-2819 /1 | UI APPLICATION MIGRATION](#)

Last Updated Date: 2022-02-21 14:33:11

Supplier: DELL MARKETING LP | Date: 2016-01-20 | Status: O | Max Amount: 790200 USD | Entered By: KMALLORY

[Contract - STATE | 44000-120-GL2905 /1 | OFFICE 365 MIGRATION](#)

Last Updated Date: 2022-02-21 14:33:11

Supplier: DELL MARKETING LP | Date: 2016-05-17 | Status: C | Max Amount: 30000.01 USD | Entered By: KMALLORY

[Contract - STATE | 41400-023-0000021118 /1 | Microsoft Image Academy](#)

Last Updated Date: 2022-02-21 14:33:11

Supplier: DELL MARKETING LP | Date: 2017-07-01 | Status: A | Max Amount: 1419363 USD | Entered By: MBRODKIN

[Contract - STATE | 44000-158-GL2885 /1 | ONPOINT SCUBI INTEGRATION](#)

Last Updated Date: 2022-02-21 14:33:11

Supplier: DELL MARKETING LP | Date: 2016-05-03 | Status: C | Max Amount: 1467750.01 USD | Entered By: KMALLORY

Step	Action
14.	The options on the left of the screen can be used to filter the results similar to the Keyword Elastic Search.

Step	Action
15.	Congratulations! You have completed Using Elastic Search – Global Search of the Purchasing/Procurement category for Requisition/Supplier Contracts data.