

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.

Team Works		∽ Hi	ome		© : <mark>ک</mark> ۵
1	News and Announcements	Commitment Control	Payables	My Favorites	
	latest news		INVOICE	<u> </u>	

Step	Action
2.	Initiate a homepage Global Search by:
	 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. For purposes of this search, criteria for a 'Requestor ID & Supplier' is specified.



Using Elastic Search Global Search for Procurement

		Home		<u>ଲ</u> ସ୍	: (
News and Announcements	Commitment Control	Payables	Purchasing/Procurement ~	XCONTRACT & ANNGILLIO \rightarrow	
latest news			+		

Step	Action			
3.	Review Search Results			
	The result set returned by the search consists of 20 total result rows. The user has several options, including:			
	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.			
	Each of these actions are explored further, below.			





Using Elastic Search Global Search for Procurement

Step	Action
4.	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.

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.





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.

< Home			
Origin	-		
- •			
014			
Category Code			
contains 🗸			
Category Description			
contains 🗸			
	Fewer Options Hid	de Operators	
Category Description Short			
contains 🗸	Search	Clear	

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

< Home	Search Results	ଜ <u>ଦ</u>
Origin	View Search Results	Purchasing/Procurement V XCONTRACT & ANNGILLIO
- ~	2 results for keyword: "XCONTRACT & ANNGILLIO"	
014		
Category Code	Requisition - 41400 0000041385	
contains 🗸	Date: 2022-05-09 Status: Approved Amount: 1611720.01 USD Entered By: ANNGILLIO Requisition Name XCONTRACT 014 Voices of Childr Requester: William Cardoza 404/232-1320	
	Requisition - 41400 0000040663 Date: 2022-03-15 Status: Complete Amount: 226224 USD Entered By: ANNGILLIO Requisition Name: XCONTRACT 014 CLASSWALLET EANS Requester: William Gardoza 404/232-1320	
Category Description		
contains 🗸		
Category Description Short		

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.



✓ New Search	< Home
Category Purchasing/Procurement V	New Search
Keywords XCONTRACT & ANNGILLIO	✓ Category ✓
With this Exact Phrase	Requisitions (2)
With any of these Words	Document Date 2022 (2)
Exclude	✓ Supplier Name
Business Unit	KLEO INC (1) VOICES FOR GEORGIAS CHILDREN INC (1)
	٠

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.

✓ Home	
New Search	View Search Results
- Category	2 results for keyword: "XCONTRACT & ANNGILLIO"
Requisitions (2)	Requisition - 41400 0000041385
→ Document Date	Requisition - 41400 0000040663
2022 (2)	Date: 2022-03-15 Status: Complete Amount: 226224 USD Entered By: ANNO
✓ Supplier Name	
KLEO INC (1)	
VOICES FOR GEORGIAS CHILDREN INC (1)	
4	>

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.





Step	Action
10.	Removing filters from Global Search results. 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.

Vew Search	< Home	Search Result
Category	✓ New Search	View Search Results
Purchasing/Procurement V	Category All ~	No results shown. You have cleared all the search criteria.
Keywords	Keywords	
XCONTRACT & ANNGILLIO	More Options	
More Options	Search	
Search Clear		

Step	Action
11.	Performing a Global Search from an enabled module page. 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.

Search Results			Contract Entry	ſ	ት C	٤
Contract Entry Contract				Procurement Contracts v	Per	sonal
SetID Contract ID ^Status	STATE 99999-001-SPD0000177-0035 Approved ~	Contract Version Version 1 Approved Date 05/31/2021	Status Current			
Administrator/Buyer Authored Document Authored Status	Executed		Maintain Document			

	Action
Step	
12.	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.

	Contract Entry	۵ C	2
Contract Entry		Procurement Contracts 👻 0000015689	
Contract			



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
ntract Entry					
er any information you hav	e and click Search. Leave	fields blank for a list of	all values.		
Eind an Existing Value	Keyword Search	Add a New Value			
ote: Keyword Search will re earch Criteria	eturn results last updated	3 days ago (02/19/2023	37:36:15PM)		
Search Results					
Filter by		Note: Keyword Search	will return results last upd	ated 3 days ago (02/19/	2023 7:36:15PM)
SetID		View as: 🗏 🖬		4	2 3 4 5 6 10 😱
STATE (96)		Contract - STATE 4400 Last Updated Date:2022	<u>)0-120-2819 /1 UI APPL</u> 2-02-21 14:33:11	ICATION MIGRATION	
Contract Begin Date		Supplier: DELL MARKE Entered By: KMALLOR'	TING LP Date: 2016-01- Y	-20 Status: O Max Am	ount: 790200 USD
2022 (10) 2021 (1) 2020 (2) 2019 (2) 2018 (6)		Contract - STATE 4400 Last Updated Date:2023 Supplier: DELL MARKE Entered By: KMALLOR	10-120-GL 2905 /1 OFFIC 2-02-21 14:33:11 TING LP Date: 2016-05- Y	CE 365 MIGRATION	ount: 30000.01 USD
Supplier Name		Contract_STATE 41400-022-0000021118 / 1 Microsoft Image Academy Last Updated Date 2022-02-32 114 33 11 Supplier DELL MARKETING LP Date: 2017-07-01 Status: A Max Amount: 1419363 USD Entered RY: WIRRDINKIN			
Buyer Name	LF (30)	Contract - STATE 4400	0-158-GL2885 /1 ONPC	DINT SCUBI INTEGRAT	ION
Miniana Caldurall 40	1050 0557 (47)	Supplier: DELL MARKE	TING LP Date: 2016-05-	03 Status: C Max Am	ount: 1467750.01 USD I

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.