Using the Search Feature in PeopleSoft Financials

PeopleSoft Financials introduced a new Oracle search feature in Release 5.30. This feature, called ElasticSearch, returns results faster than former search engines and adapts to fluid environments, such as tablets and cell phones. ElasticSearch allows users to do both a Global and Keyword Search and employs eight (8) operators (pg. 5) that enable users to get the most accurate results.

**Note:** Transactional searches conducted in the new global search or keyword search pages may not return results in real time.

1. **How to Search in PeopleSoft Financials**

PeopleSoft provides a Global Search icon, which appears in the header of the PeopleSoft browser session.

The Global Search feature allows the user to search and drill down to a specific row of data without navigating through the menu structure and entering search criteria there.

The Global Search Bar consists of a:

- **Free text search edit box:** Users can type in a key word and PeopleSoft will return every document with a reference to that word to which the user has access.

- **Drop-down list for selecting a specific search group:** Users can click the down arrow by the word All to get a list of search groups they can use to narrow their search. If they choose Accounts Payable, for example, and enter a voucher number in the search edit box, PeopleSoft will return every document with that number in the Accounts Payable module.
II. How to View Search Results

After running a search using the Global Search bar, the system displays search results in an interactive box that allows users to choose filters or navigate to other screens.

This example illustrates the fields and controls returned on the Global Search Results page from our search for 04005799 in Accounts Payable.

Search results features:

1. The left panel displays module-specific search options and predefined filters, also called facets, with which you can narrow your search. If you click on Payments, for example, you narrow your search to the 2 payment documents for 04005799.
2. The right panel displays all search results. Here, you can see we have 4. Users can click on the title, which is a clickable link (URL), to see an actual document or webpage.
3. Click the Show/Hide icon to retract or expand the filters panel.
4. The New Search area enables you to initiate a new search by selecting a search category and entering keywords.
Action Buttons:

On the right side of the results panel, users will see a green Action Button. When they click on it, all of the actions that are available display. These actions are module specific.

III. Keyword Search Pages

In addition to the Find an Existing Value and Add a New Value, PeopleSoft now provides a Keyword Search option on many search pages. This option allows users to perform a deeper, more free-form search against the data.

The Keyword Search involves the use of the Keyword tab, which enables users to perform searches with unspecific information, just as you do when you perform an Internet search. The primary benefit of this search is the ability to search on many more levels of data. For example, you can search for words included in the journal line description, a search that was not previously available.

The Advanced Search link takes users to a more detailed search page that is specific to the module in which they are working. These added criteria can be used with the Keyword search to refine results.
Search results, including filters and links, display below the search fields.
Search Operators in PeopleSoft Financials

In the Global Search bar and the Keyword Search box, PeopleSoft Financials supports the use of search operators along with keywords to specify the type of search to be performed, such as a phonetic search, stemming search, fuzzy search, and so on. Search operators and their functions are listed below.

<table>
<thead>
<tr>
<th>Search</th>
<th>Symbol</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>All Words Must Appear</td>
<td>&amp;</td>
<td>Use &amp; (ampersand) to specify that all words must appear in the results. Although all words in the search must appear, they may not appear in the order in which the user entered them and other words may be present.</td>
</tr>
<tr>
<td>Exact Match</td>
<td>“ ”</td>
<td>Use “ ” (double quotes) around words that make up a phrase that must be matched exactly.</td>
</tr>
<tr>
<td>Fuzzy Search</td>
<td>~</td>
<td>Use the ~ character as a suffix to indicate that fuzzy search is to be performed. Fuzzy search returns search results based on a likely relevance to the keyword even though the keyword and results spellings may not match. maintainance~ returns search results containing words such as maintenance.</td>
</tr>
<tr>
<td>Phonetic Search</td>
<td>!</td>
<td>Use ! (exclamation mark) as a prefix to indicate that phonetic search is to be performed. Phonetic search returns results that have a similar sound. !john returns search results containing names such as John, Jon, Juan.</td>
</tr>
<tr>
<td>Return Results for Any Words</td>
<td></td>
<td>Use</td>
</tr>
<tr>
<td>Stemming</td>
<td>$</td>
<td>Use the $ character as a prefix to indicate that stemming search is to be performed. Stemming search returns search results that match the root of a keyword. $install returns search results containing words such as install, installing, installed.</td>
</tr>
</tbody>
</table>
| Wildcard                      | *      | Use * (asterisk) as a wildcard to search and match on one or more characters. You can use the * at the beginning of a keyword, at the end of a keyword, or in between a keyword. Examples:  
  - document* — returns search results with words beginning with document, such as documents, documentary, documentation.  
  - *ment — returns search results with words ending in ment, such as department or management. Note: Minimum of four characters plus the wildcard required. |
| Wildcard                      | ?      | Use ? (question mark) as a wildcard to search and match on one character. You can use multiple ? within a keyword, for example, Or?c?e. Orac?e returns search results with words such as Oracle. |