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.

I. 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.
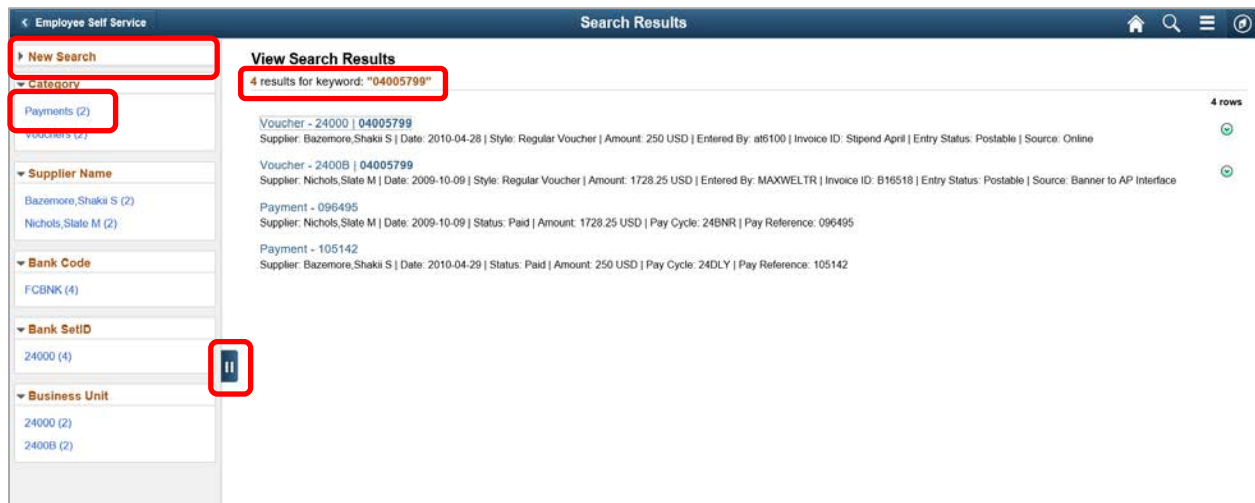
Search results features:

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:

View Search Results
4 results for keyword: "04005799"

Actions ✕

4 rows

Voucher Build Error Detail

Voucher - 24000 | **04005799**
Supplier: Bazemore,Shakii S | Date: 2010-04-28 | Style: Regular Voucher | Amount: 250 USD | Entered By: at6100 | Invoice ID: Stipend April | Entry Status: Postable | Source...

Review Document Status

Voucher - 2400B | **04005799**
Supplier: Nichols,Slate M | Date: 2009-10-09 | Style: Regular Voucher | Amount: 1728.25 USD | Entered By: MAXWELTR | Invoice ID: B16518 | Entry Status: Postable | Source... Banner to AP Interface

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.

Voucher

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

Find an Existing Value | **Keyword Search** | Add a New Value

Note: Keyword Search will return results last updated 24 days ago (09/19/2017 8:36:12AM)   Search Tips
▼ Search Criteria

Keywords [   ]

Search   Basic Search Advanced Search

Find an Existing Value | Keyword Search | Add a New Value

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.

Voucher

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

Find an Existing Value | Keyword Search | Add a New Value

Note: Keyword Search will return results last updated 21 days ago (09/19/2017 8:36:12AM)

▼ Search Criteria

Keywords [   ]

Field	Operator	Value
Business Unit	=	93000
Voucher ID	contains phrase	04005799
Invoice Number	contains phrase	
Invoice Date	=	
Short Supplier Name	contains phrase	
Supplier ID	contains phrase	
Supplier Name	contains phrase	
Voucher Style	=	
Related Voucher	contains phrase	
Entry Status	=	
Voucher Source	=	
Incomplete Voucher	=	
Business Unit Description:	contains phrase	
Additional Name:	contains phrase	
Approval Status:	contains phrase	
Match Status:	contains phrase	
AP Post Status:	contains phrase	
Budget Status:	contains phrase	
Budget Status - Misc:	contains phrase	
Voucher Close Status:	contains phrase	
Origin:	contains phrase	
Currency Code:	contains phrase	
Gross Invoice Amount:	=	
Accounting Date:	=	
Bank Account:	contains phrase	
Bank SetID:	contains phrase	
Bank Code:	contains phrase	
Item ID:	contains phrase	
Packing Slip:	contains phrase	
Payment Message:	contains phrase	
Ship To Location:	contains phrase	

Search results, including filters and links, display below the search fields.

Filter by

Note: Keyword Search will return results last updated 24 days ago (09/19/2017 8:36:12AM)

50 of 2668557 results are displayed.

View as:

View All   First ◀ 1-50 of 50 ▶ Last

Business Unit

39000 (348722)
3900B (220456)
43000 (192456)
30000 (116944)
5100B (103689)
More...

Invoice Date

9791 (1)
8279 (1)
5003 (1)
5002 (1)
3104 (1)
More...

Supplier Name

City Of Statesboro (25440)
Georgia Power Company (12580)
U.S. Foodservice (10459)
Single Payment Vendor (8940)
United Parcel Service (8029)
More...

Business Unit	Voucher ID	Invoice Number	Gross Invoice Amount	Payment Amount	Invoice Date	Short Supplier Name	Supplier ID	Supplier Name	Voucher Style	Related Voucher	Entry Status	Voucher Source	Incomplete Voucher
98000	00067297	9/10 Cohort22	258	258	09/10/2008	WATSONJOEL-001	0000008575	Watson, Joel D	Regular	(blank)	Postable	Online	
98000	03002093	1231279 5004946	70336.8000	70336.8000	12/28/2008	SUNTRUSTEQ-001	0000008477	SunTrust Equipment Finance&Leasing Corp	Regular	(blank)	Postable	Online	
98000	00067308	D713447	80.1200	80.1200	09/12/2008	ENTERPRISE-001	0000003629	Enterprise Leasing Company of GA LLC	Regular	(blank)	Postable	Online	
98000	03002100	404 Z04-0158 920 0354 Dec	73.7500	73.7500	12/01/2008	BELLSOUT-001	0000001429	Bellsouth	Regular	(blank)	Postable	Online	
98000	00067317	89916782	208.1200	208.1200	09/08/2008	FACILITYSU-001	0000008331	Facility Supply Group	Regular	(blank)	Postable	Online	
98000	00067318	66699	70	70	07/31/2008	COLLINSDIG-001	0000001604	Collins Digital Imaging, Inc	Regular	(blank)	Postable	Online	
98000	03002115	5834	4768.7700	4768.7700	12/10/2008	COMMUNIC-001	0000001641	Communications Consulting	Regular	(blank)	Postable	Online	
98000	00067325	9/3 Warner Robins	54.9900	54.9900	09/16/2008	GREGORYKA-001	0000003792	Gregory, Katherine H	Regular	(blank)	Postable	Online	
98000	00067326	8/27 Douglas	548.3100	548.3100	09/09/2008	GREGORYKA-001	0000003792	Gregory, Katherine H	Regular	(blank)	Postable	Online	
98000	00067331	8/27 Douglas	577.0200	577.0200	09/18/2008	MURPHYSAL-001	0000007336	Murphy, Sally K	Regular	(blank)	Postable	Online	
98000	03002138	22966635	605.1600	605.1600	12/15/2008	OFFICETE-001	0000002008	Office Team	Regular	(blank)	Postable	Online	
98000	00067365	100232	1654619	1654619	09/18/2008	ELLUCIANSU-001	0000006081	Ellucian Support Inc	Regular	(blank)	Postable	Online	
98000	00067374	9/19 Tifton	781.1300	781.1300	09/19/2008	LEHOCKYAL-001	0000007979	Lehocky, Alex H	Regular	(blank)	Postable	Online	
98000	00067401	PO#3260(8 invoices)	4866.9000	4866.9000	07/24/2008	APPLECOM-001	0000002010	Apple Computer, Inc.	Regular	(blank)	Postable	Online	
98000	03002156	1235495 5004867	23438.0500	23438.0500	01/12/2009	SUNTRUSTEQ-001	0000008477	SunTrust Equipment Finance&Leasing Corp	Regular	(blank)	Postable	Online	
93000	04008222	1981477	140.7100	140.7100	10/10/2012	FISHERSC-001	0000000201	Fisher Scientific Co. Llc	Regular	(blank)	Postable	Online	
93000	04008230	80067 (50%)	3725	3725	10/09/2012	DOMINEY-001	0000001331	Dominey Machine & Propeller Service, Inc	Regular	(blank)	Postable	Online	
98000	03002161	384270	9775	9775	12/14/2008	NUMARA-001	0000008280	Numara Software	Regular	(blank)	Postable	Online	
93000	04008243	2633401	136.4800	136.4800	10/17/2012	FISHERSC-001	0000000201	Fisher Scientific Co. Llc	Regular	(blank)	Postable	Online	

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.

Search	Symbol	Explanation
All Words Must Appear	&	Use & (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.
Exact Match	" "	Use " " (double quotes) around words that make up a phrase that must be matched exactly.
Fuzzy Search	~	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.
Phonetic Search	!	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.
Return Results for Any Words	|	Use | (pipe) to search on any of the words or phrases. "year-end report" | statement will return results with either year-end report or statement or both.
Stemming	$	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.
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.