Using Elasticsearch - Asset Management - Keyword Search
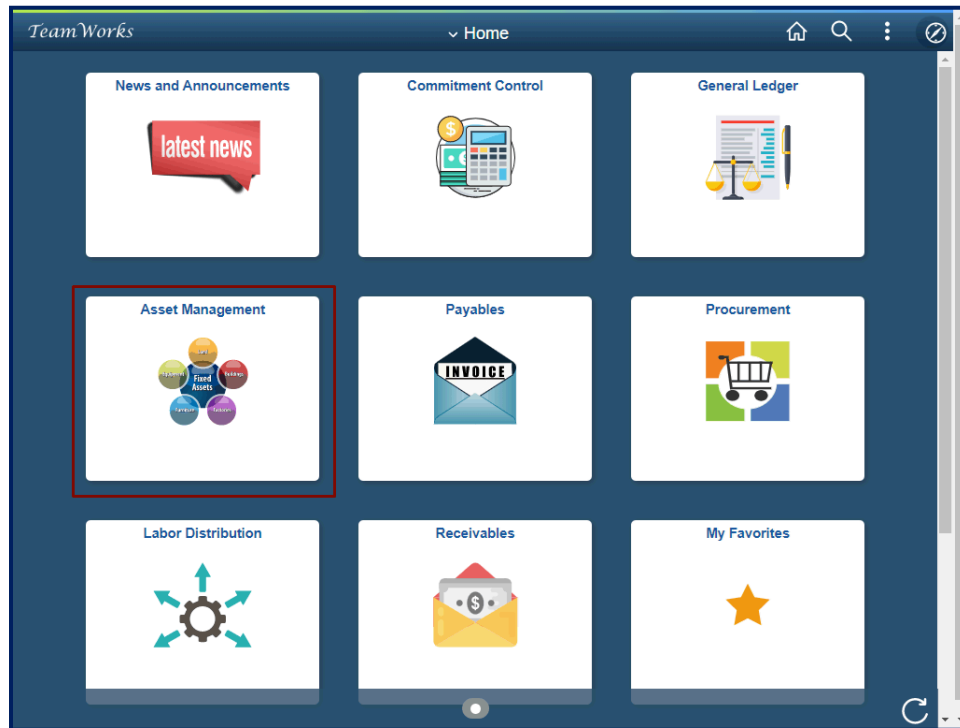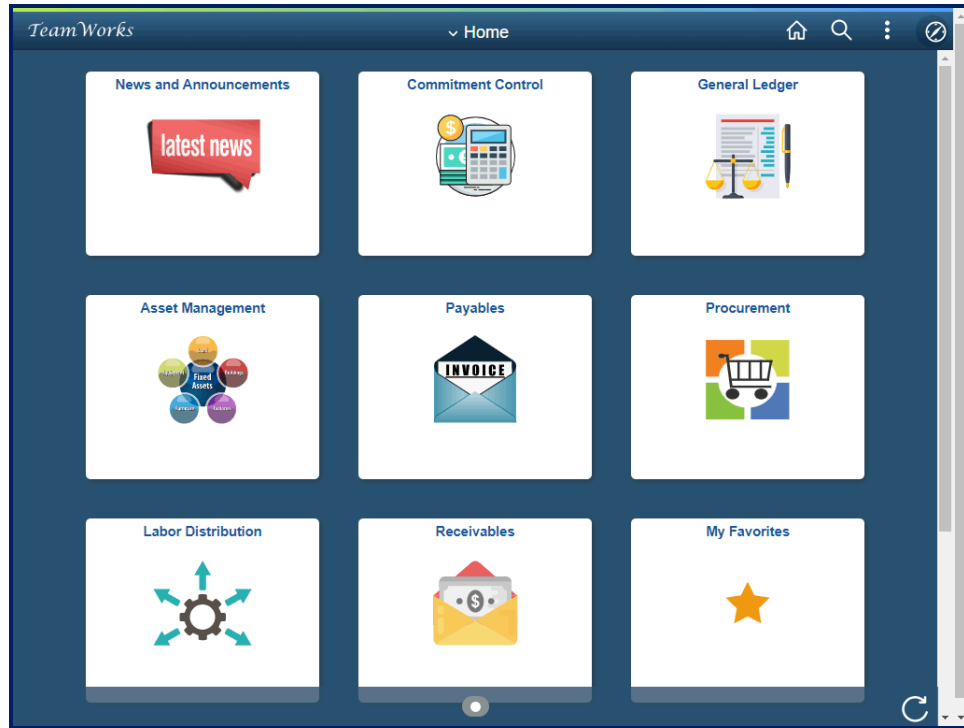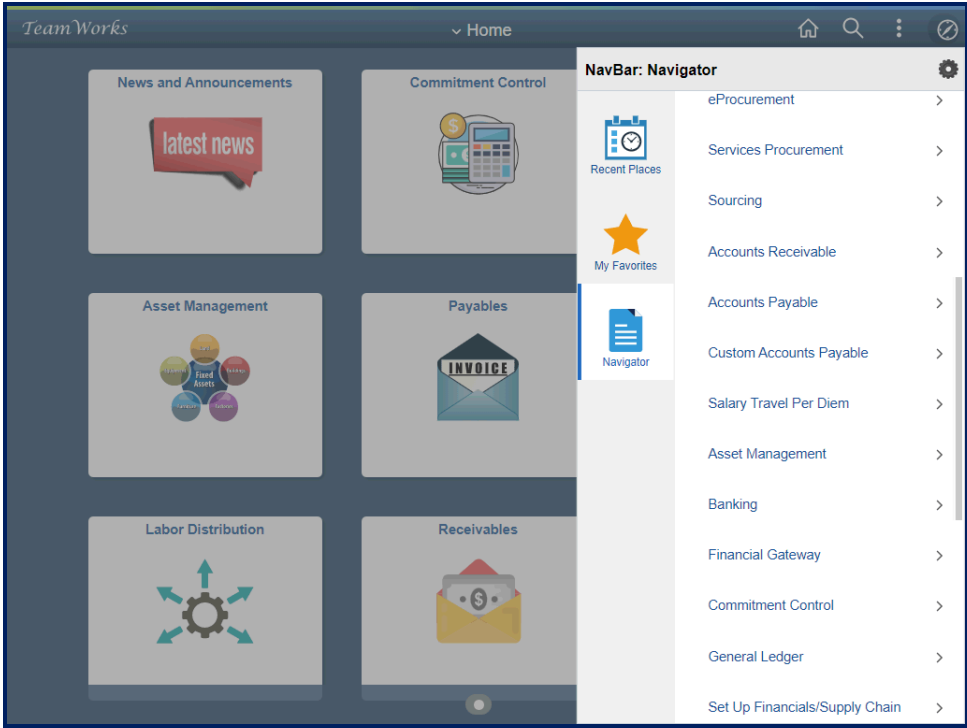

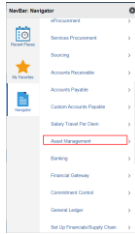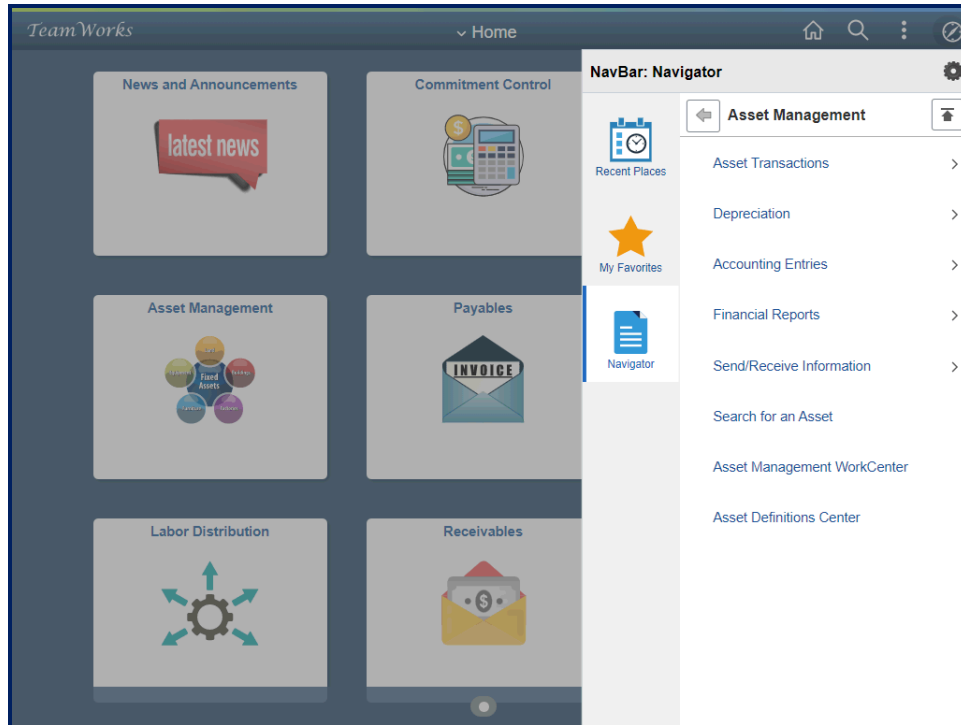| Step	Action
1.	Elasticsearch is an open-source search engine used for the PeopleSoft Search Framework. This new functionality is designed to assist users the functionality to search for values, documents, forms etc. within an individual PeopleSoft module or across various PeopleSoft models based on their security access. When using this new asset management information functionality, after typing in a particular word search, the system displays values the appropriate values. This can be helpful when searching for a large set of terms or values. Elasticsearch can be used using a Keyword Search or a global search. Keyword Search allows users to search with an individual PeopleSoft module whereas global search allow users to search across various PeopleSoft modules based on security access.

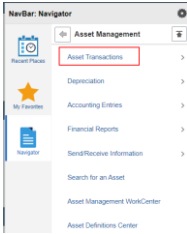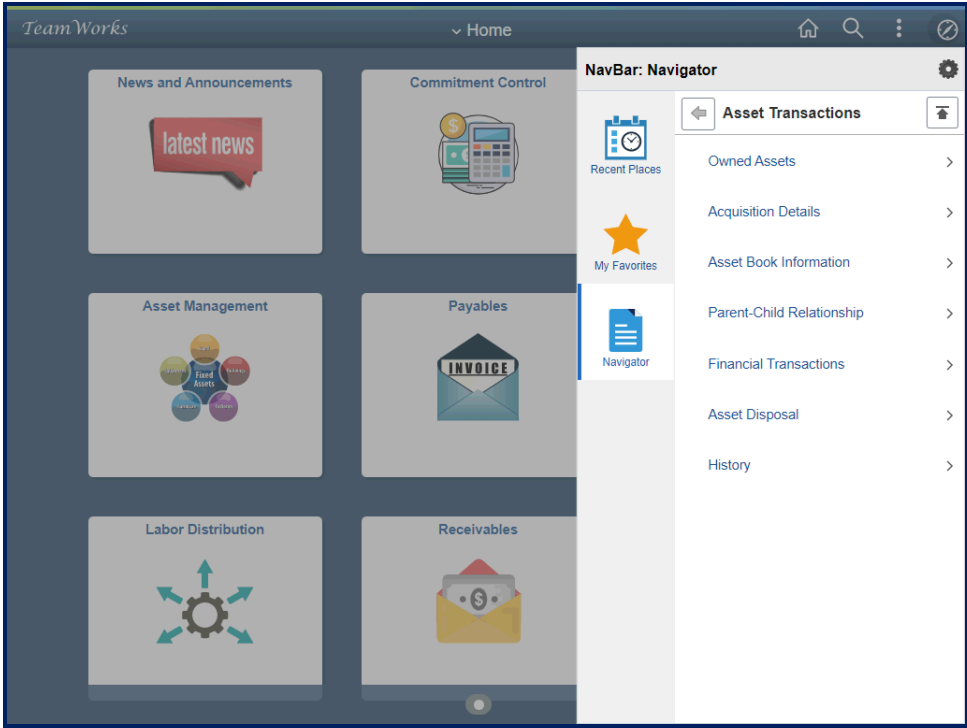| Step	Action
2.	For this job aid, the navigation will display the Keyword Search using the **Asset Basic Information** page. This simulation is an example of a transaction. **Note:** From the Home page, users have the option to click on the **Asset Management** WorkCenter tile. Click the **NavBar** link.
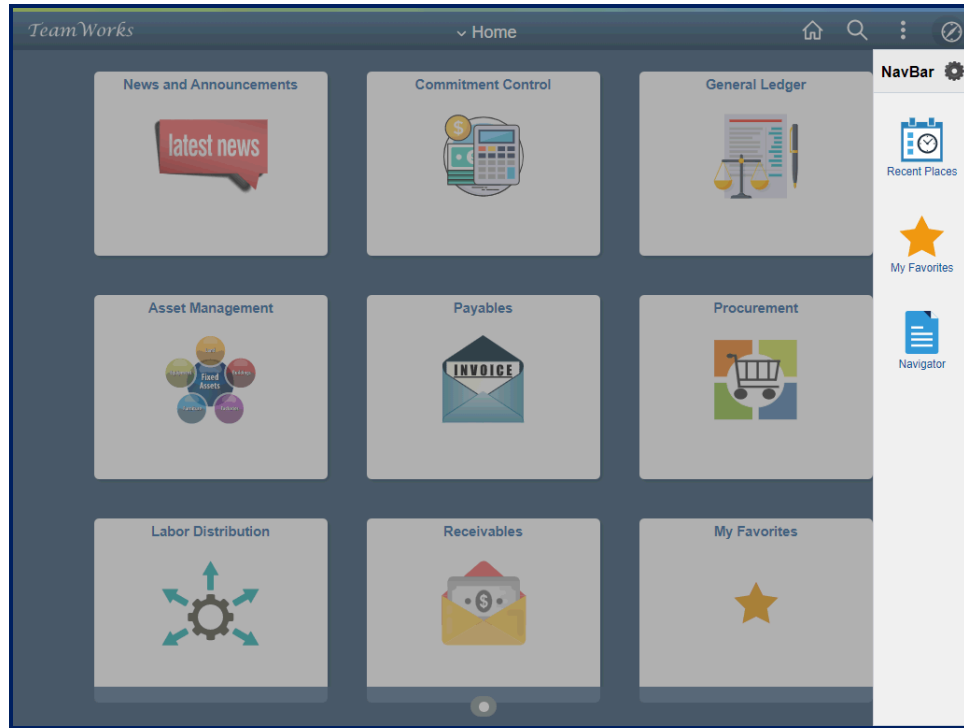
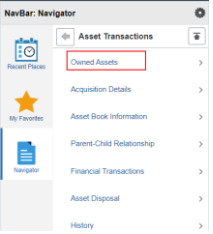| Step	Action
3.	Click the **Navigator** link.

Step	Action
4.	Click the **Asset Management** link.
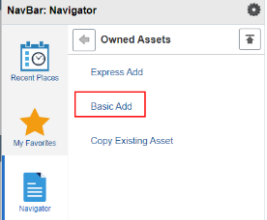
Step	Action
5.	Click the **Asset Transactions** link.

Step	Action
6.	Click the **Owned Assets** link.
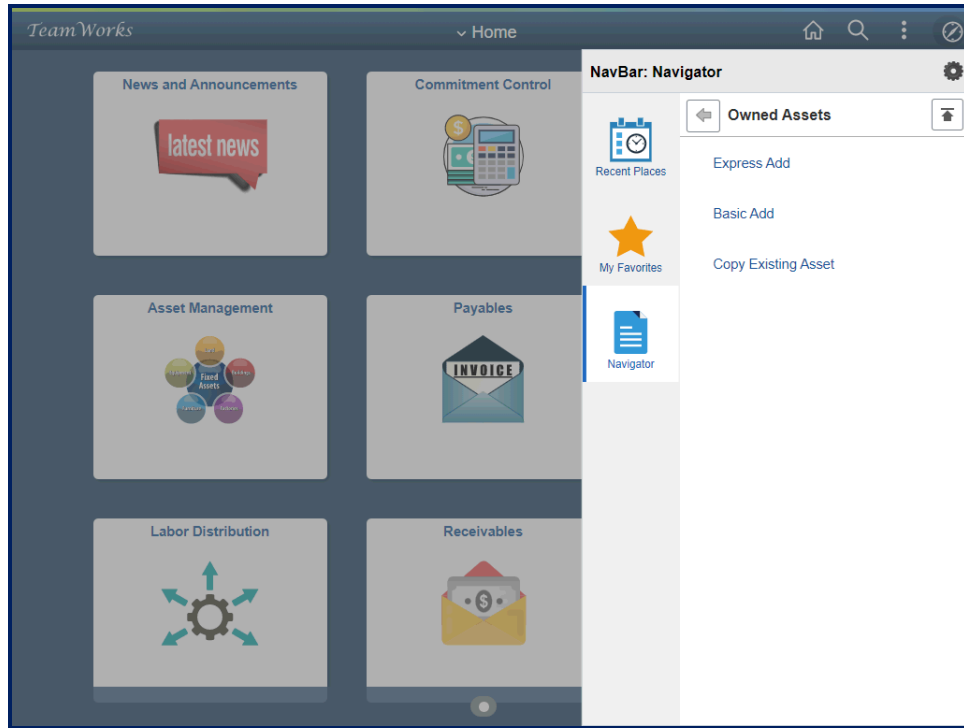
Step	Action
7.	Click the **Basic Add** link.

Job Aid

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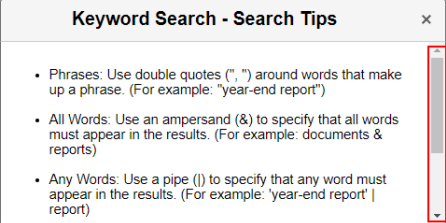
Step	Action
8.	Click the **Keyword Search** tab.
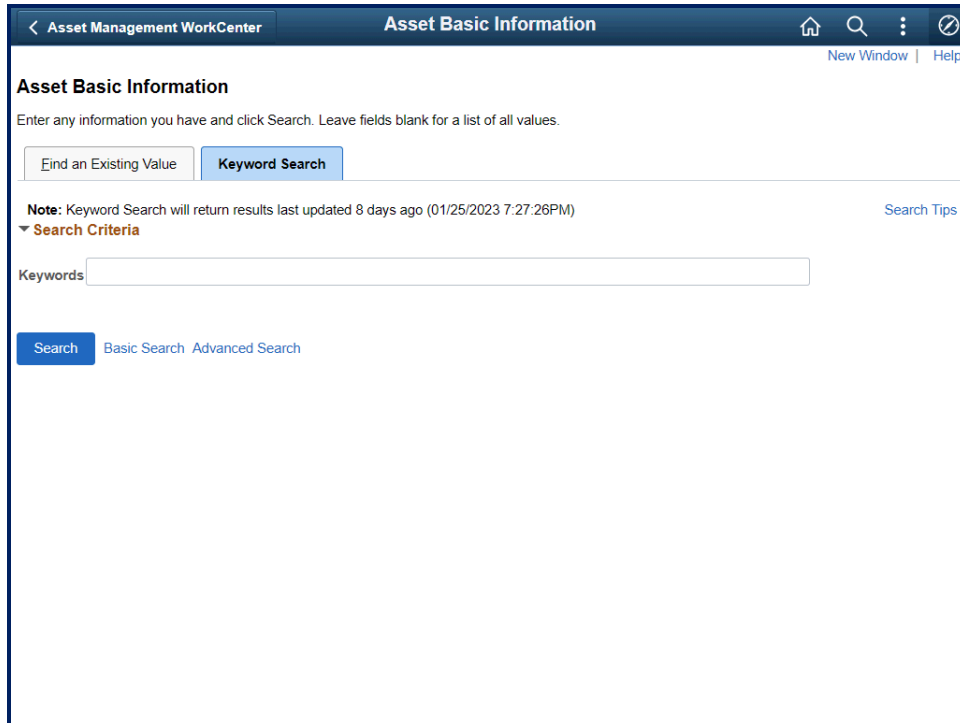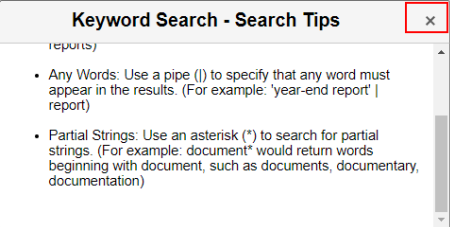
Step	Action
9.	Click the **Search Tips** link. Search Tips
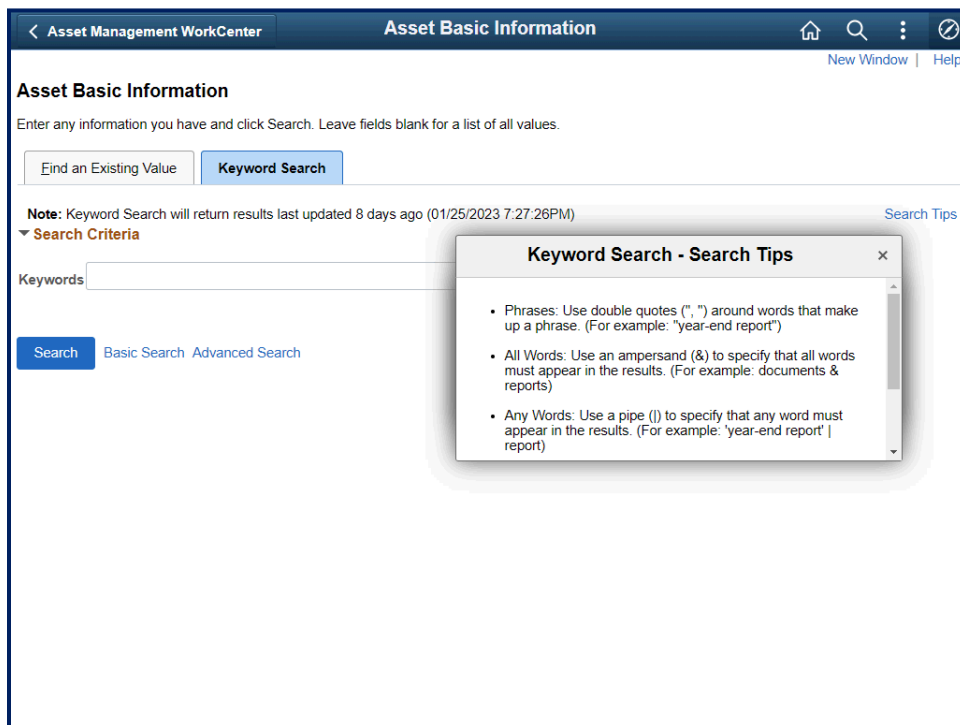
Step	Action
10.	Inside the **Keyword Search - Search Tips** dialog box, click the **Vertical** scrollbar to view more information.
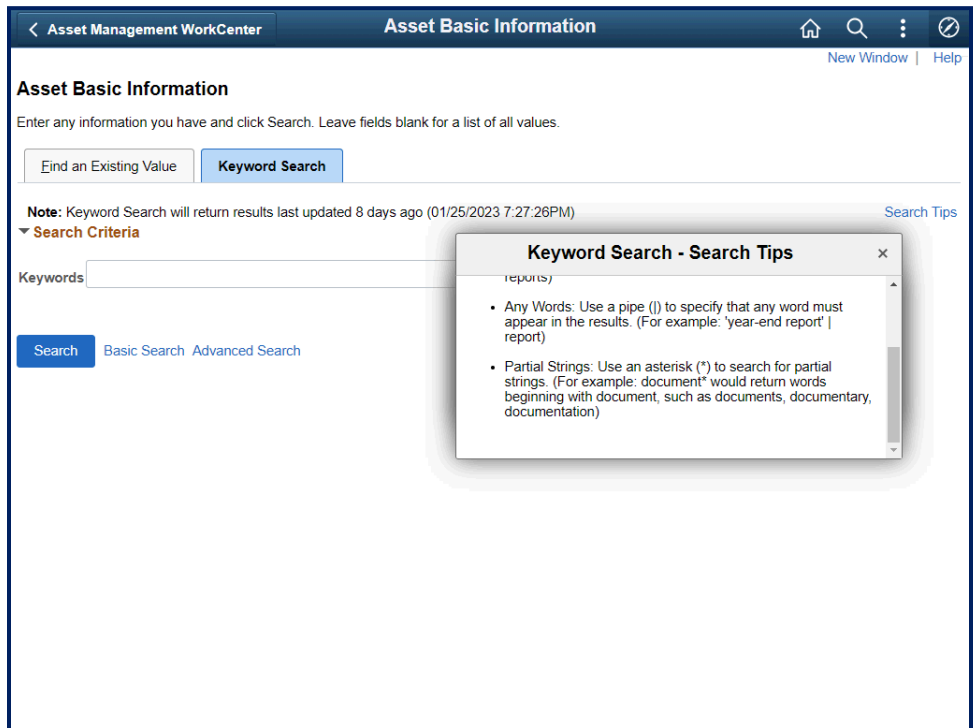
Step	Action
11.	Click the **X** link to close out the **Keyword Search - Search Tips** dialog box.

![SAO State Accounting Office logo]

‹ Home	**Asset Basic Information**	⌂ 🔍 ⋮ ⊘

New Window | Help

Asset Basic Information

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

Find an Existing Value	Keyword Search

Note: Keyword Search will return results last updated 6 days ago (01/25/2023 7:27:26PM)   Search Tips
▼ Search Criteria

Keywords [   ]

[Search] Basic Search Advanced Search

Step	Action
12.	For this example, click in the **Keywords** field. Keywords [ ]

‹ Home	**Asset Basic Information**	⌂ 🔍 ⋮ ⊘

New Window | Help

Asset Basic Information

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

Find an Existing Value	Keyword Search

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Keywords [   ]

[Search] Basic Search Advanced Search
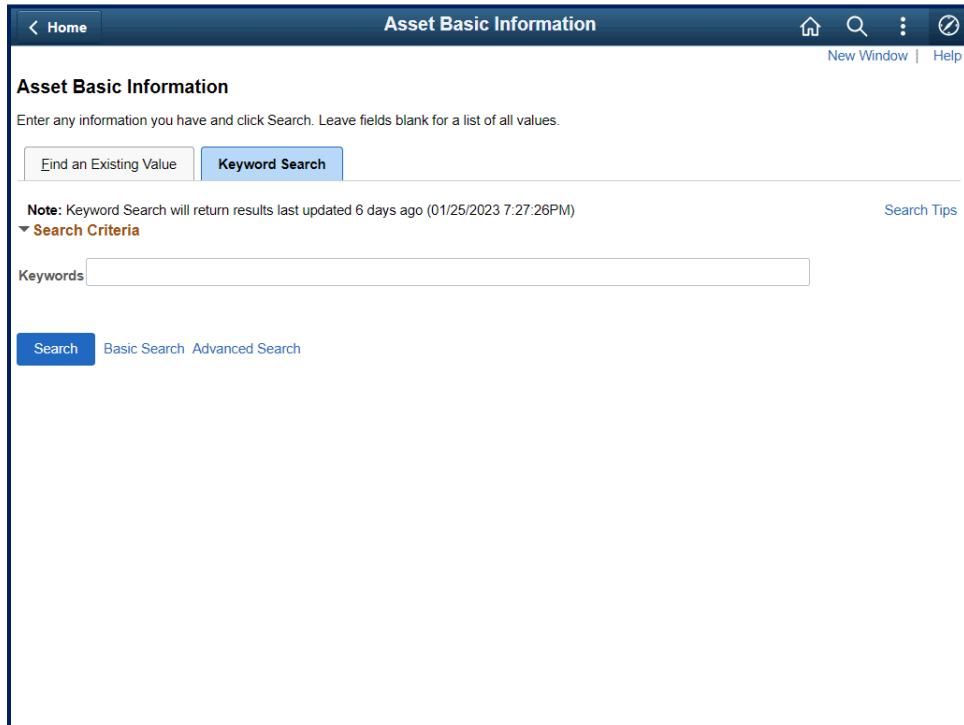
Step	Action
13.	Enter the appropriate information into the **Keywords** field. For this example, type **Remote**. Keywords
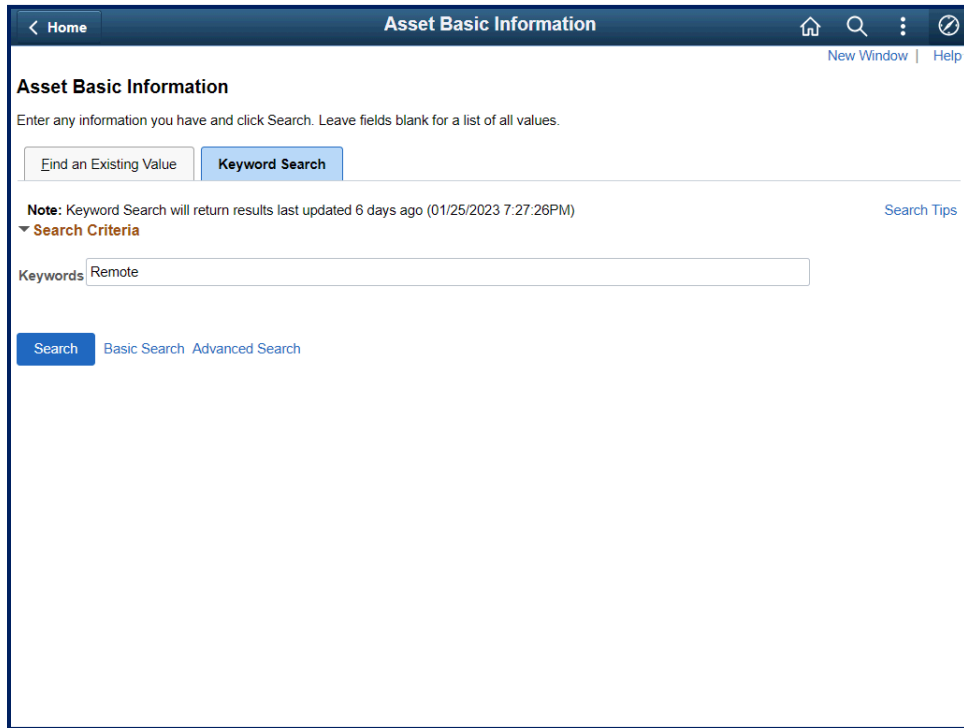
Step	Action
14.	Click the **Search** button.

Step	Action
15.	Notice the system displays the search results. For this example, notice in the table below provide information on various asset identification information. Users can use any of the **Filter by** options to narrow the search results.

Step	Action
16.	To view more information, click the **Horizontal** scrollbar to view the right side of the page.

Step	Action
17.	Click the **Vertical** scrollbar to view the bottom of the page.

Step	Action
18.	Click the **Horizontal** scrollbar to return to the left side of the page.

Step	Action
19.	Click the **Vertical** scrollbar to return to the top of the page.
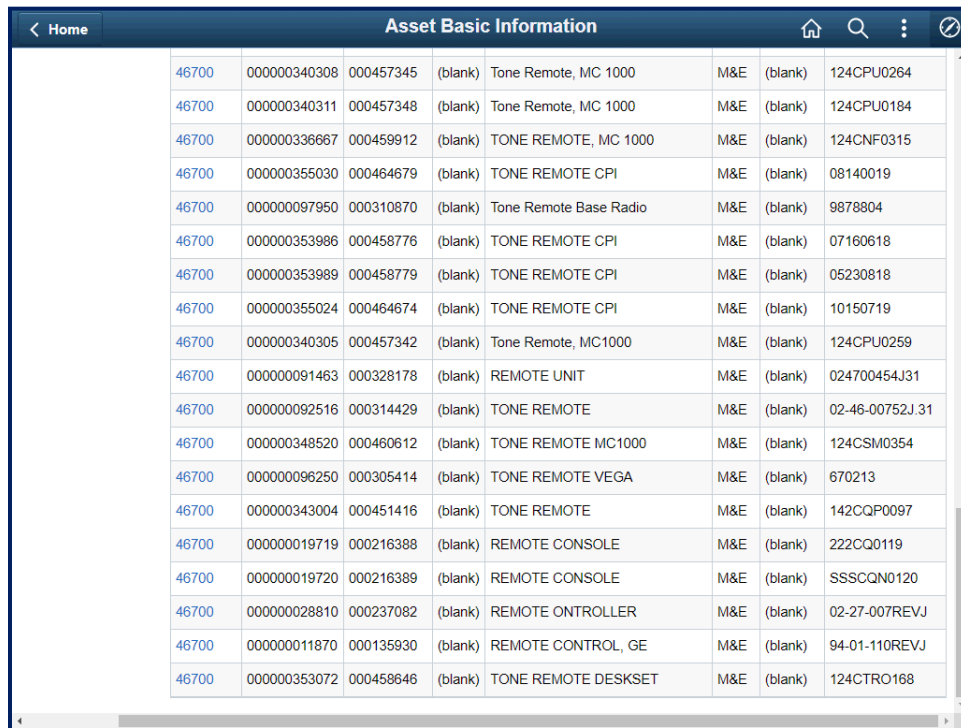
Step	Action
20.	For this example, let's take a look at how to view additional information based on the **Assess Acquisition Dates**. The system displays the year and the number of search result items for each individual year. For this example, click the **2022 (1)** link. **Asset Acquisition Date** 2022 (1) 2021 (6) 2019 (13) 2018 (6) 2017 (5) More...

Step	Action
21.	The system displays the <u>one</u> search result item.
	Click the **Business Unit - 46700 - 000000360281** link to view the search result information.

Step	Action
22.	**Note:** Users have the option to click on any of the tabs across the top of the page and the ability to use the horizontal and vertical scrollbar to view more detail information.
	For this example, click the **Vertical** scrollbar to view the bottom of the page.

Step	Action
23.	Click the **Return to Search** button.

Job Aid

Step	Action
24.	To return to the original search result list. Click in the **Asset Identification** field.

Job Aid

Step	Action
27.	Click the **X** button to clear the search result list for **2022**.
	Search Results
	2022 [X] | Clear All Filters

Step	Action
28.	**Note:** Notice the system return to the original "remote" **Keyword Search** result list.

Step	Action
29.	**Note:** If applicable, users have the option to select another **Asset Acquisition Date**, view an item from the search results or select another **Filter by** option. For this example, click the **Search Criteria** button to expand the search filter options. ▶ Search Criteria
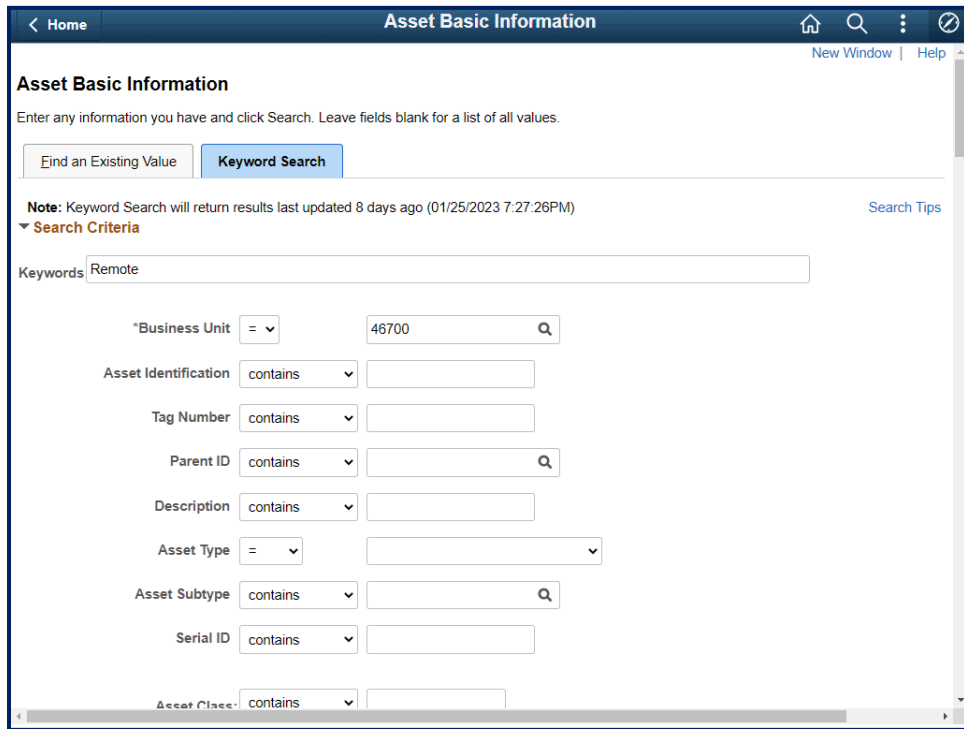
Step	Action
30.	Click the **Vertical** scrollbar to view the bottom of the page.

Step	Action
31.	The system displays the original search results from the original term(s) used for the keyword search. Click the **Vertical** scrollbar to return to the top of the page.

Step	Action
32.	If applicable, type a new term in the **Keywords Search** field to perform a new search. For this example, no additional term(s) will be searched. Click the **Home** button to return to the Home Page.
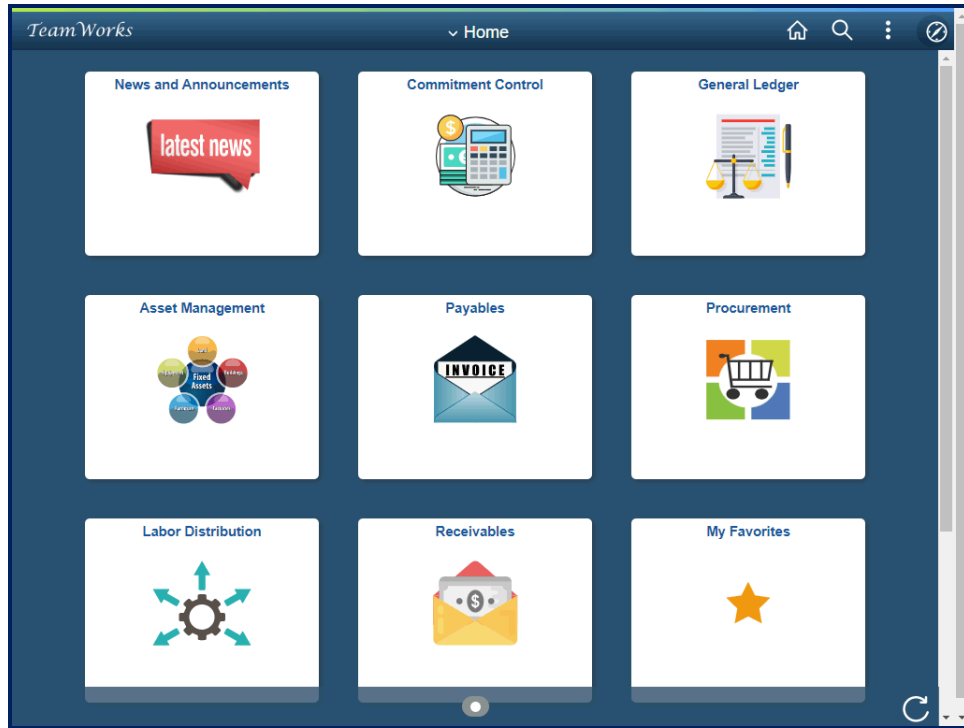
Step	Action
33.	**Congratulations!** You have completed Using Elasticsearch - Asset Management. **End of Procedure.**