

PeopleSoft PeopleTools 8.63

Search Technology



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Preface

Understanding the PeopleSoft Online Help and PeopleBooks

The PeopleSoft Online Help is a website that enables you to view all help content for PeopleSoft applications and PeopleTools. The help provides standard navigation and full-text searching, as well as context-sensitive online help for PeopleSoft users.

Hosted PeopleSoft Online Help

You can access the hosted PeopleSoft Online Help on the [Oracle Help Center](#). The hosted PeopleSoft Online Help is updated on a regular schedule, ensuring that you have access to the most current documentation. This reduces the need to view separate documentation posts for application maintenance on My Oracle Support. The hosted PeopleSoft Online Help is available in English only.

To configure the context-sensitive help for your PeopleSoft applications to use the Oracle Help Center, see *Configuring Context-Sensitive Help Using the Hosted Online Help*.

Locally Installed PeopleSoft Online Help

If you're setting up an on-premises PeopleSoft environment, and your organization has firewall restrictions that prevent you from using the hosted PeopleSoft Online Help, you can install the online help locally. Installable PeopleSoft Online Help is made available with selected PeopleSoft Update Images and with PeopleTools releases for on-premises installations, through the [Oracle Software Delivery Cloud](#).

Your installation documentation includes a chapter with instructions for how to install the online help for your business environment. The documentation zip file may contain a README.txt file with additional installation instructions. See *PeopleSoft 9.2 Application Installation* for your database platform, "Installing PeopleSoft Online Help."

Installable PeopleSoft Online Help now includes PDF versions of each PeopleBook. For more information, see *Understanding Locally Installed PeopleSoft Online Help*.

Downloadable PeopleBook PDF Files

You can access downloadable PDF versions of the help content in the traditional PeopleBook format on the [Oracle Help Center](#). The content in the PeopleBook PDFs is the same as the content in the PeopleSoft Online Help, but it has a different structure and it does not include the interactive navigation features that are available in the online help.

Common Help Documentation

Common help documentation contains information that applies to multiple applications. The three main types of common help are:

- Application Fundamentals
- Using PeopleSoft Applications
- Using and Managing the PeopleSoft Online Help

Most product families provide a set of application fundamentals help topics that discuss essential information about the setup and design of your system. This information applies to many or all applications in the PeopleSoft product family. Whether you are implementing a single application, some combination of applications within the product family, or the entire product family, you should be familiar with the contents of the appropriate application fundamentals help. They provide the starting points for fundamental implementation tasks.

In addition, the *PeopleTools: Applications User's Guide* introduces you to the various elements of the PeopleSoft Pure Internet Architecture. It also explains how to use the navigational hierarchy, components, and pages to perform basic functions as you navigate through the system. While your application or implementation may differ, the topics in this user's guide provide general information about using PeopleSoft applications.

Finally, *Using and Managing the PeopleSoft Online Help* (this guide) introduces you to the setup, features, and usage of the online help system.

Field and Control Definitions

PeopleSoft documentation includes definitions for most fields and controls that appear on application pages. These definitions describe how to use a field or control, where populated values come from, the effects of selecting certain values, and so on. If a field or control is not defined, then it either requires no additional explanation or is documented in a common elements section earlier in the documentation. For example, the Date field rarely requires additional explanation and may not be defined in the documentation for some pages.

Typographical Conventions

The following table describes the typographical conventions that are used in the online help.

Typographical Convention	Description
<u>Key+Key</u>	Indicates a key combination action. For example, a plus sign (+) between keys means that you must hold down the first key while you press the second key. For <u>Alt+W</u> , hold down the <u>Alt</u> key while you press the <u>W</u> key.
. . . (ellipses)	Indicate that the preceding item or series can be repeated any number of times in PeopleCode syntax.
{ } (curly braces)	Indicate a choice between two options in PeopleCode syntax. Options are separated by a pipe ().
[] (square brackets)	Indicate optional items in PeopleCode syntax.
& (ampersand)	When placed before a parameter in PeopleCode syntax, an ampersand indicates that the parameter is an already instantiated object. Ampersands also precede all PeopleCode variables.

Typographical Convention	Description
⇒	This continuation character has been inserted at the end of a line of code that has been wrapped at the page margin. The code should be viewed or entered as a single, continuous line of code without the continuation character.

ISO Country and Currency Codes

PeopleSoft Online Help topics use International Organization for Standardization (ISO) country and currency codes to identify country-specific information and monetary amounts.

ISO country codes may appear as country identifiers, and ISO currency codes may appear as currency identifiers in your PeopleSoft documentation. Reference to an ISO country code in your documentation does not imply that your application includes every ISO country code. The following example is a country-specific heading: "(FRA) Hiring an Employee."

The PeopleSoft Currency Code table (CURRENCY_CD_TBL) contains sample currency code data. The Currency Code table is based on ISO Standard 4217, "Codes for the representation of currencies," and also relies on ISO country codes in the Country table (COUNTRY_TBL). The navigation to the pages where you maintain currency code and country information depends on which PeopleSoft applications you are using. To access the pages for maintaining the Currency Code and Country tables, consult the online help for your applications for more information.

Region, Country, and Industry Identifiers

Information that applies only to a specific region or industry is preceded by a standard identifier in parentheses. This identifier typically appears at the beginning of a section heading, but it may also appear at the beginning of a note or other text.

An example of a region-specific heading is: "(Latin America) Setting Up Depreciation"

Region Identifiers

Regions are identified by the region name. The following are examples of region identifiers that may appear in PeopleSoft Online Help:

- Asia Pacific
- Europe
- Latin America
- North America

Country Identifiers

Countries are identified by a three-letter country code. The following are examples of country identifiers that may appear in the PeopleSoft Online Help:

- ARG (Argentina)
- AUS (Australia)
- CAN (Canada)
- NLD (The Netherlands)

Industry Identifiers

Industries are identified by the industry name or by an abbreviation for that industry. The following are examples of industry identifiers that may appear in the PeopleSoft Online Help:

- USF (U.S. Federal)
- E&G (Education and Government)

Translations and Embedded Help

PeopleSoft 9.2 software applications include translated embedded help. With the 9.2 release, PeopleSoft aligns with the other Oracle applications by focusing our translation efforts on embedded help. We are not planning to translate our traditional online help and PeopleBooks documentation. Instead we offer very direct translated help at crucial spots within our application through our embedded help widgets. Additionally, we have a one-to-one mapping of application and help translations, meaning that the software and embedded help translation footprint is identical—something we were never able to accomplish in the past.

Using and Managing the PeopleSoft Online Help

Select About This Help in the left navigation panel on any page in the PeopleSoft Online Help to see information on the following topics:

- Using the PeopleSoft Online Help.
- Managing hosted Online Help.
- Managing locally installed PeopleSoft Online Help.

PeopleTools Related Links

[PeopleSoft 8.63 Home Page](#)

[PeopleSoft Search and Insights Home Page](#)

[PeopleSoft Online Help](#)

[PeopleSoft Information Portal](#)

[PeopleSoft Spotlight Series](#)

[PeopleSoft Training and Certification | Oracle University](#)

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1

Getting Started with PeopleSoft Search Technology

PeopleSoft Search Technology Overview

The PeopleSoft Search Framework provides a standard, declarative method for creating, deploying, and maintaining search indexes for all of your PeopleSoft applications. Beginning with PeopleTools 8.60.07, PeopleSoft Search Framework provides support for using OpenSearch as the search engine. OpenSearch is an open-source software suite based on Apache Lucene™. PeopleSoft Insights is PeopleSoft's brand for visualizations and analytics driven by search framework. Currently, PeopleSoft Insights uses OpenSearch Dashboards for visualizations and analytics. PeopleTools is integrated with OpenSearch version 3.2.0, OpenSearch Dashboards version 3.2.0, and Logstash version 9.1.3.

The OpenSearch search engine complements the PeopleSoft Search Framework search functionality with the following advantages:

- Seamless deployment using OpenSearch DPK and ACM plug-ins.
- Ability to deploy highly available indexes, with fail over that is scalable.
- Excellent crawl and search performance.
- Efficient resource utilization on the search engine host making high volume crawling and searching practical.
- Excellent data recovery management.
- Efficient data collection engine and analytic and visualization platform.

Implementing PeopleSoft Search Using OpenSearch

The PeopleSoft Search Framework involves the proper configuration and use of the following systems, tools, and technology. To administer or develop applications using the PeopleSoft Search Framework, a working knowledge of these systems is recommended.

Required Item	Documentation
PeopleSoft environment	<i>PeopleSoft 9.2 Application Installation</i> for <your database platform>. For hardware and software requirements, see My Oracle Support, Certifications for your PeopleTools release.
OpenSearch	See <i>PeopleSoft Deployment Packages Installation for Search Components</i> for the current release. See OpenSearch Reference [3.2.0] (www.opensearch.org).

Required Item	Documentation
OpenSearch Dashboards	See <i>PeopleSoft Deployment Packages Installation for Search Components</i> for the current release. See OpenSearch Reference [3.2.0] (www.opensearch.org).
Logstash	See <i>PeopleSoft Deployment Packages Installation for Search Components</i> for the current release.
PeopleSoft Integration Broker	See Integration Broker Administration.
PeopleSoft Query and Connected Query	See Query.
PeopleCode	See PeopleCode API Reference: Understanding the PeopleSoft Search Framework Classes.

2

Understanding PeopleSoft Search Framework Integration with OpenSearch

PeopleSoft Search Framework Features

PeopleSoft Search Framework enables application developers and implementation teams to create search artifacts in a consistent, declarative manner and to deploy and maintain search indexes using one standard interface, regardless of the PeopleSoft application.

The PeopleSoft Search Framework consists of PeopleSoft components (pages and records provided by PeopleTools), which provide a centralized interface for configuring PeopleSoft integration with the search engine, creating search artifacts such as search definitions, search categories, and building and maintaining search indexes.

Some of the key features include:

- Search Administration Activity Guide provides a familiar PeopleSoft browser interface enabling you to: configure search engine connectivity, deploy search definitions, schedule index creation and maintenance, and run incremental index updates from one location.
- Search Designer Activity Guide provides a familiar PeopleSoft browser interface enabling you to: create search definitions, create search categories, define title and summary result display.
- Flexible security: indexes can be created with source-level security, document-level security, or no security. PeopleSoft Search Framework allows for fully authenticated and authorized search queries.
- Search Query API enabling rich display options, such as filtering.
- Visualizations of system metrics and indexing metrics using PeopleSoft Insights.

The PeopleSoft Search Framework enables you to generate search indexes using these source types:

- PeopleSoft Query and Connected Query: this option provides a familiar and intuitive way to declare the fields relevant for end user searches. With PeopleSoft Query you define your search meta data attributes. You use the Search Framework Designer to map query fields to meta data attributes, save the search definition to the database, and create search categories.
- Web Source: this option enables you to index content deployed on a website that you want to make available for end user searches.
- File Source: this option enables you to index files residing in your file system, such as reports.
- Activity Guide: this option enables you to index activity guide instance data that can be used for analytics in PeopleSoft Insights. The user can include the required activity guide templates and the application records (if required) using the search designer and select the corresponding search attributes that are needed to be indexed and seen in the visualization.

- **External Data Source:** this option enables you to index and visualize data from sources external to PeopleSoft. These sources include non-PeopleSoft data repositories such as relational databases (for example, SQL Server), LDAP directories, REST APIs, and other external systems.

After designing search definitions, the Search Framework Administration activity guide enables you to establish integration with a search engine (by way of Integration Broker), deploy the search definitions and search categories, and build indexes.

Search Framework Definitions

The Search Framework is based on these PeopleSoft definitions:

Definition	Description
Search Definition	Created in the Search Framework designer activity guide, a search definition maps the PeopleSoft Query fields, web source, or file source, to searchable attributes in the search engine. The search definition also enables you to attach security attributes to restrict access to the search results. The search definition provides the information required by the framework to enable the system to create search results (search documents).
Search Category	Also created in the Search Framework designer activity guide, search categories enable you to group search definitions logically. A search definition must belong to at least one search category. End users run searches against search categories, not individual search definitions. It is a requirement that at least one search category exists with exactly the same name as the search definition.

Search Documents

Search documents describe the format of search results.

The main elements of a PeopleSoft search document are:

- URL
- Title
- Summary

In some cases search documents are non-structured documents, such as a Microsoft Word document or the text in a website. In a PeopleSoft application, the majority of information is structured, (for example, a Purchase Order). PeopleSoft information resides in a relational database where the document attributes constituting the search document are well known such as Employee Name, Customer Name, Product ID, and so on. While most of the PeopleSoft information can be displayed in the form of structured documents, the system also stores unstructured data in the form of attachments.

When a user runs a search based on a set of known attributes, the search returns “hits” in the form of search documents or search results. The user then analyzes the content of the search

result to determine relevancy and uses the associated URL to navigate to the desired application page.

OpenSearch Concepts and Terminology

The OpenSearch search engine uses the following concepts and terminology.

OpenSearch Terminology	Description
Cluster	A cluster is a collection of one or more nodes (servers) that together holds your entire data and provides federated indexing and search capabilities across all nodes. A cluster is identified by a unique name which by default is 'opensearch'. This name is important because a node can only be part of a cluster if the node is set up to join the cluster by its name. Make sure that you don't reuse the same cluster names in different environments, otherwise you might end up with nodes joining the wrong cluster. For instance you could use logging-dev, logging-stage, and logging-prod for the development, staging, and production clusters. In a PeopleSoft implementation, you can specify a cluster name when you install OpenSearch, and if you need to change the name, you need to edit the opensearch.yml configuration file.
Node	A node is a single server that is part of your cluster, stores your data, and participates in the cluster's indexing and search capabilities. Just like a cluster, a node is identified by a name. You can define any node name you want if you do not want the default. This name is important for administration purposes where you want to identify which servers in your network correspond to which nodes in your OpenSearch cluster.
Index	An index is a collection of documents that have somewhat similar characteristics. In a single cluster, you can define as many indexes as you want. An index is an equivalent of a relational database table. In a PeopleSoft implementation, by default, each search definitions/search categories is deployed as an individual index.
Alias	Alias is a reference to an OpenSearch index. An alias can be mapped to more than one index. In a PeopleSoft implementation, a search category is mapped as an Alias on the OpenSearch server.

OpenSearch Terminology	Description
Document	A document is a basic unit of information that can be indexed. This document is expressed in JavaScript Object Notation (JSON) format. Connected query returns parent and child rows. In a PeopleSoft implementation, each row returned from the main query corresponds to a document in OpenSearch. Child information is attached to the main query and is sent as one document.
Shards and Replicas	OpenSearch provides the ability to subdivide your index into multiple pieces called shards. When you create an index, you can simply define the number of shards that you want. Each shard is in itself a fully-functional and independent 'index' that can be hosted on any node in the cluster. OpenSearch allows you to make one or more copies of your index's shards into what are called replica shards, or replicas for short. After the index is created, you may change the number of replicas dynamically anytime but you cannot change the number of shards after-the-fact.

OpenSearch Support Based on PeopleSoft Application Version

All customers should review the information on the PeopleSoft Search and Insights Home Page, Troubleshooting and Known Issues to determine which updates and fixes are required for your application. The information is applicable whether you are doing a new installation of OpenSearch or moving from Elasticsearch.

For more information on which update images have the required fixes for your application, see *PeopleSoft Search and Insights Home Page (Doc ID 2205540.2) on My Oracle Support*.

PeopleSoft Search Framework Supported Features in OpenSearch

This table lists the OpenSearch key functionality from the perspective of its use and implementation within a PeopleSoft application system.

Item	OpenSearch Functionality
High availability	The recommended approach to high availability is by deploying an OpenSearch cluster with at least three nodes on machines that are not on the same physical server and by following the configuration guidelines.
Fail-over mechanism	OpenSearch is distributed by nature, that is, it knows how to manage multiple nodes. A cluster can contain one or more nodes and one of the nodes act as a master node. OpenSearch automatically distributes the indexed data to the nodes based on its constructs of primary shards and replica shards, so indexed data is available even when a node fails.

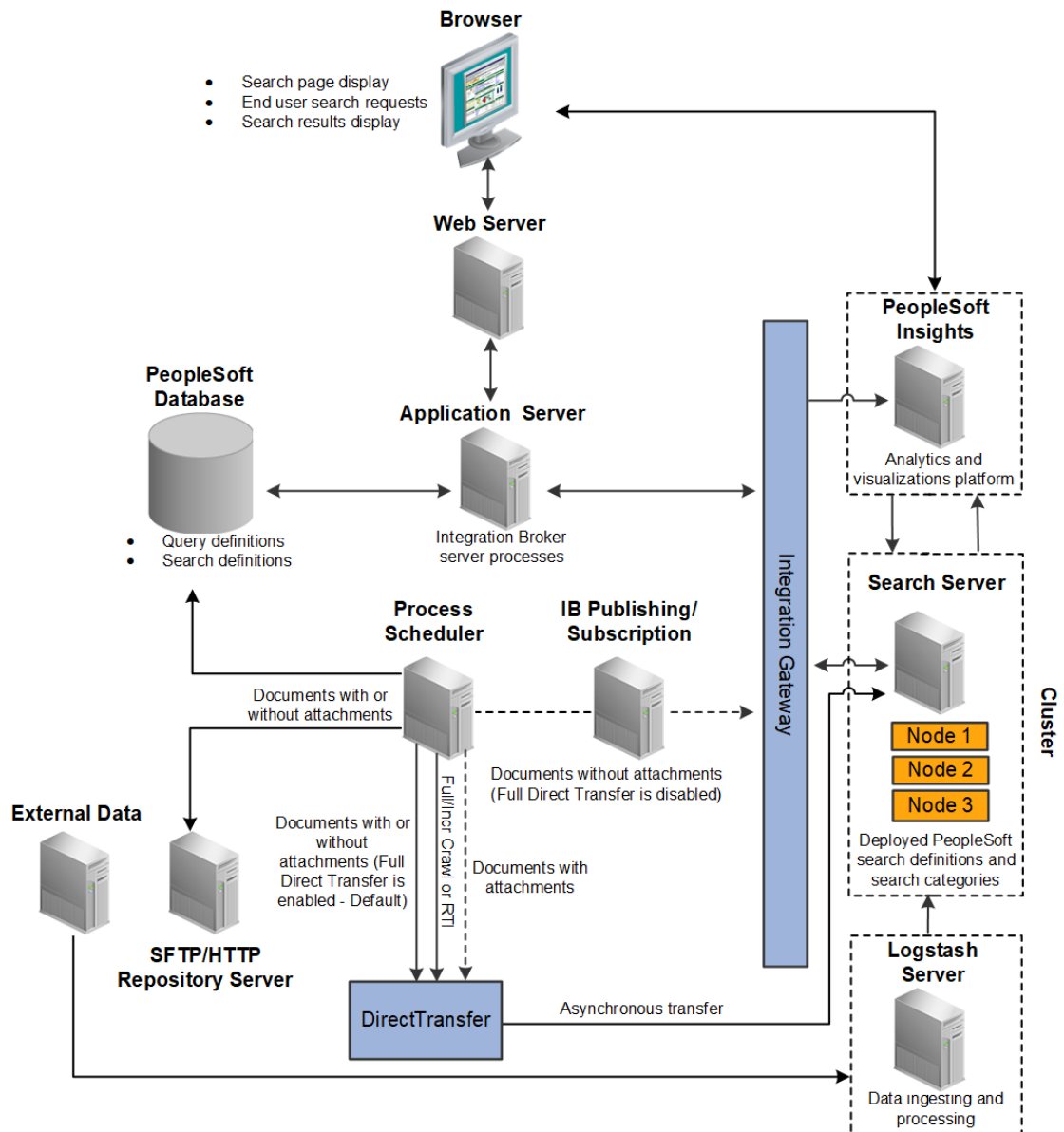
Item	OpenSearch Functionality
Phonetic	OpenSearch supports phonetic search using a plug-in that is installed when you install OpenSearch in a PeopleSoft implementation. Note: For custom search pages, PeopleSoft Applications can use PeopleSoft APIs for phonetic queries in OpenSearch.
Wild card search	OpenSearch supports using a wild card as a leading character in a search text. For example, *racle.
Attachment processing	PeopleSoft Search Framework downloads any attachment specified in a search definition, and directly pushes the attachment to the search engine using the DirectTransfer technology. OpenSearch uses the ingest-attachment plug-in to extract the attachment contents and indexes the attachment data.
Stemming	OpenSearch supports limited stemming support, for example, talk/talked/talks.
Stemming is the process of reducing inflected word to its root or stem. For example, talking, talked, talks will reduce to the root — talk.	OpenSearch supports stemming search for the following languages: • Arabic • Czech • Danish • Dutch • English • Finnish • French • German • Greek • Hungarian • Italian • Japanese • Korean • Norwegian • Portuguese • Romanian • Russian • Simplified Chinese • Spanish • Swedish • Thai • Turkish • Traditional Chinese
Relevancy Scoring	Relevancy scoring is performed by OpenSearch, which uses an internal scoring algorithm.
Custom Scoring	In OpenSearch, custom scoring is supported through Search Framework APIs.

Item	OpenSearch Functionality
Synonyms	OpenSearch uses a file (synonyms_grammar.txt) to store synonyms or any abbreviations that you want to include. If synonyms provided are not adequate for your installation, you can modify this file. The file is located at config\analysis\synonym_grammar.txt in OpenSearch installation. You can enter synonyms in two ways: "i-pod, i pod => ipod" OR "universe, cosmos"
Semantic Search	OpenSearch supports semantic search using vector embedding generated from selected text fields and search text. PeopleSoft Search Framework uses hybrid search to combine keyword search and vector search, with keyword matches given higher priority so that exact keyword matches appear at the top of the search results.

PeopleSoft Search Framework Architecture

The server topology uses the essential elements of the PeopleSoft Internet Architecture, with the addition of a search engine server and PeopleSoft Insights.

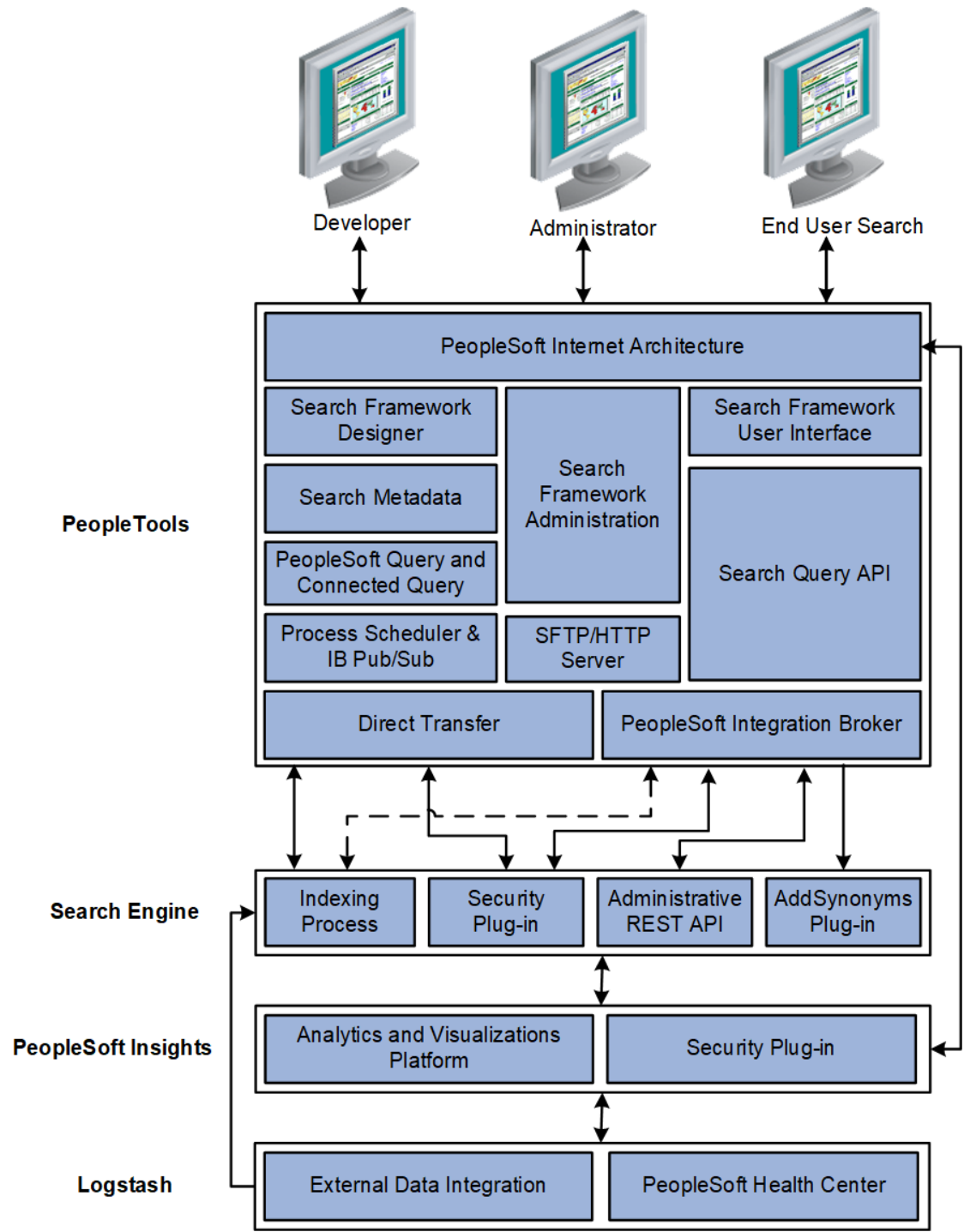
The following illustration depicts the PeopleSoft server architecture connected to search engine (using Integration Broker and DirectTransfer), PeopleSoft Insights, and Logstash.



The web server and application server (the PeopleSoft Internet Architecture) provide the interface for the design, administration, and end user access. The PeopleSoft database stores the PeopleSoft queries that define the search data as well as the search definition meta data. PeopleSoft uses the Process Scheduler and Integration Broker's publishing and subscription functionality to push application data to the search engine server. In Full Direct Transfer mode, PeopleSoft Search Framework pushes the documents with attachments and documents without attachments to the search engine and bypasses Integration Broker. The search engine stores the deployed search definitions and performs the typical search engine tasks, such as building indexes, crawling for updates, maintaining indexes, and servicing end-user search requests. A cluster can have multiple nodes that assist in providing high availability and fail-over mechanism. Within the cluster, the search engine internally maintains indexes among the nodes. PeopleSoft Insights is an analytics and visualizations platform, which enables users to create visualizations based on application indexes in the search engine. It is also a monitoring tool that provides real-time information on the health of the system and search engine metrics.

The following diagram depicts the relationships between all of the separate elements that are involved with the PeopleSoft Search Framework.

The following illustration depicts PeopleTools, search engine, PeopleSoft Insights, and Logstash elements interaction to enable the PeopleSoft Search Framework features.



PeopleTools

The following table describes the PeopleTools elements.

PeopleTools Element	Description
PeopleSoft Internet Architecture	Enables access to all aspects of the PeopleSoft Search Framework, including development, administrative, and end user interfaces.
Search Framework Designer	Enables application developers and implementation teams to perform design-time tasks, such as map query fields to search metadata, define search attributes, create search definitions, and create search categories.
Search Metadata	The metadata defined with both PeopleSoft Query and the Search Designer to describe the data that end users will run searches against.
PeopleSoft Query Connected Query	Provides familiar interface for creating SQL queries that declare exactly the data against which end users will run searches, and takes advantage of Query security.
Process Scheduler Integration Broker Publishing and Subscription	Facilitates the transfer of application data from PeopleSoft to the search engine server.
Search Framework Administration	Provides the interface for system administrators to perform tasks, such as creating a search instance, deploying search objects, scheduling search index builds, and administering PeopleSoft Insights.
SFTP/HTTP Repository Server	Facilitates storing of attachments, which are associated with search definitions.
Search Framework User Interface	Provides the PeopleSoft application end user with the appropriate prompts and fields by which they can submit a search request and review results.
Search Query API	A PeopleCode API that enables application developers to form a valid search request from user input.
PeopleSoft Integration Broker	Facilitates the integration between PeopleTools elements and the search engine.
Direct Transfer	Facilitates the transfer of application data to the search engine directly; bypassing the Integration Broker.

Search Engine

The following table describes the search engine elements.

Search Engine Element	Description
Indexing Process	The indexing process indexes document search attributes such as Title, Summary, search fields (fields to index), and so on. It can also index document-level security attributes if document-level security is being used. The search engine uses the Ingest attachment plug-in to process attachments, both from the database and from the repository (FTP, SFTP, HTTP).

Search Engine Element	Description
Security Plug-in	This module gets invoked from the search engine for a user who initiates a search from an application. The search security framework is responsible for authentication, search user validation, and authorization of the search query request. The search engine does a callback with the call back user credentials and passes the search user ID to the PeopleSoft Security Service (Web service) which authorizes the users and gets security attributes for that user. Search results are filtered based on this security attribute. The security plug-in (orcl-security-plugin) is built on top of the search engine.
Administrative REST APIs	The administrative tasks include various processes, such as, deploying, undeploying, report synchronization, and updating. The http methods of GET, PUT, POST, and DELETE are used while sending the REST API requests to the search engine.
AddSynonyms Plug-in	The AddSynonyms plug-in updates the synonyms file. The Copy to Search Instance action in PIA calls the AddSynonyms plug-in in the search engine to update the synonyms file.

PeopleSoft Insights

The following table describes the PeopleSoft Insights elements.

PeopleSoft Insights Element	Description
Analytics and Visualizations platform	PeopleSoft Insights is an analytics and visualizations platform that uses indexes in the search engine to display data in dashboards and visualizations.
Security Plug-in	The security plug-in module gets invoked from PeopleSoft Insights for a user who attempts to view a dashboard or visualization. PeopleSoft Insights does a callback with user credentials to the search engine, which in turn does a callback with the call back user credentials and passes the search user ID to the PeopleSoft Security Service (Web service) which authorizes the users and gets security attributes for that user. Data in visualizations and dashboards are filtered based on this security attribute. The search security framework is responsible for authentication, search user validation, and authorization of the request.

Logstash

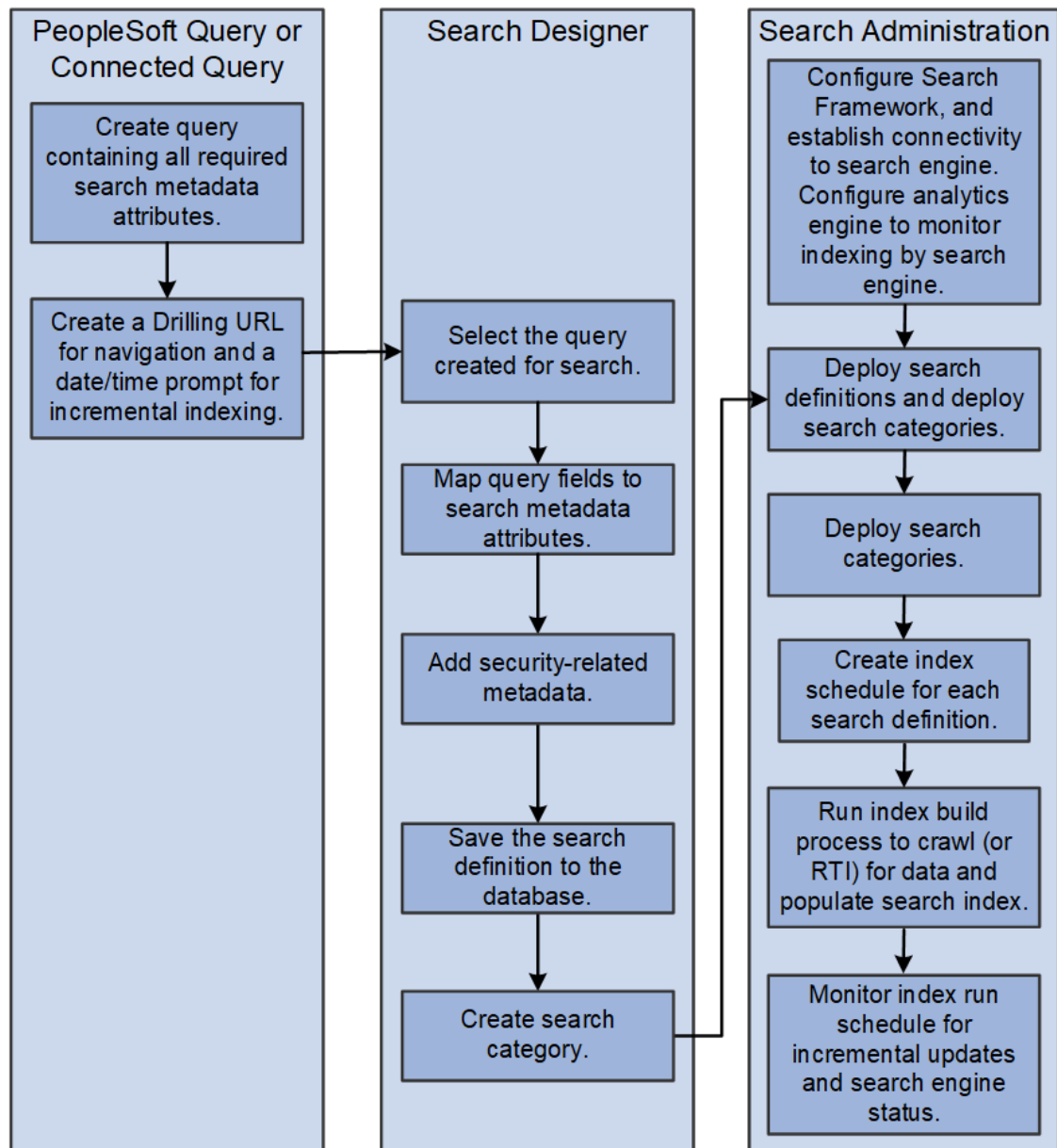
The following table describes the Logstash elements.

Logstash Element	Description
External Data Integration	External Data Integration enables to integrate external data with PeopleSoft. It uses Logstash to ingest the data from external sources to the search engine.
PeopleSoft Health Center	PeopleSoft Health Center monitors the health of your PeopleSoft applications. It uses Logstash to collect data.

Implementation Process Flow

The following diagram illustrates the general process flow when implementing the PeopleSoft Search Framework and deploying search definitions. You first identify the business data you want to expose to text searches and create queries using PeopleSoft Query. PeopleSoft Query selects the appropriate data from your transaction tables. You map the query fields to the search metadata attributes and map the search definition to a search category in the Search Designer. In the Search Administration activity guide, you deploy the search definitions and categories, schedule index builds, and schedule index crawling so that the index can be updated as needed to reflect the current business data.

The following illustration depicts the Search Framework implementation, beginning with PeopleSoft Query and Connected Query, moving to the Search Designer for creating search definitions and categories, then moving to Search Administration for deploying search definitions and defining index builds.

PeopleSoft Search Framework Process Flow**Note**

For web source, file source, external data, and activity guide type search definitions, PeopleSoft Query is not used. For the web, file, and external data source types, you only need to point to the location of the web, file, or external data source in the respective search definition. For activity guide type search definitions, you need to select the corresponding activity guide templates and application records (if needed) and select the corresponding search metadata attributes that need to be indexed.

PeopleSoft Search Features

Once Search Framework is configured and search definitions have been deployed and tested, these PeopleSoft Search features are available for your end users:

- Global Search.
- Search Pages.

Global Search

With Global Search enabled, the Global Search bar displays in the application header. The Global Search bar provides a drop-down list for selecting a specific search category against which to run a search.

See [Working with Global Search](#) and [Working with Search Results in Fluid User Interface](#).

See [Working with Suggestions Search](#).

This example illustrates the Global Search bar.



Search Pages

If you've enabled the Search Pages feature for Search Framework by mapping a component for a search definition, the end user encounters the Keyword Search page when navigating to a component. The Keyword Search page enables users to execute a deeper, more free-form search to access application data. For example, the Find an Existing Value tab is limited to level 0 data, where the Keyword Search tab lets the users enter custom keywords and the system will search indexed data from levels 0-3.

Note

The Find an Existing Value search page is equivalent to the component search pages in previous versions of PeopleSoft applications.

See [Working with Search Pages](#) and [Working with Search Results in Fluid User Interface](#).

3

Working with OpenSearch Clusters

Understanding Clusters in OpenSearch

OpenSearch runs on Java Virtual Machines. Each JVM instance running OpenSearch can be considered as an OpenSearch node. To provide redundancy and scaling, OpenSearch supports the concept of a cluster. Multiple nodes running on one or more hosts (physical or virtual) can be grouped into a cluster, using a unique cluster name. Further, the index and source data managed by each node can be configured to suit load patterns and redundancy needs. Searches performed on a cluster will return integrated results from each of the nodes.

Different types of nodes can be present in a cluster. One node in the cluster is elected to be the master node, which is responsible for lightweight cluster-wide actions such as creating or deleting an index, tracking which nodes are part of the cluster, and deciding which shards to allocate to which nodes. Any master-eligible node (all nodes by default are master-eligible nodes) may be elected to become the master node by the master election process. OpenSearch transparently manages the process of gathering the response from node or nodes holding the data.

Note

In the PeopleSoft implementation of an OpenSearch cluster, the cluster contains only the master-data node, that is, the node can act both as a master and as a data node.

Depending on the purpose of your multi-node cluster, you may set up nodes on different machines or on a single machine. In a production environment, you would set up nodes on different machines when you want to achieve high availability. In a non-production environment, when you want to test the setup and multi-node cluster, you may set up multiple nodes on the same machine, but note that you may not be able to test the high-availability feature.

OpenSearch provides the ability to subdivide your index into multiple pieces called shards. When you create an index, you can simply define the number of shards that you want. Each shard is in itself a fully-functional and independent index that can be hosted on any node in the cluster. OpenSearch allows you to make one or more copies of your index's shards into what are called replica shards, or replicas for short.

This topic discusses:

- Setting up a cluster when you perform a fresh deployment of OpenSearch using the PeopleSoft delivered Deployment Packages (DPK).
- Adding new nodes to an existing OpenSearch cluster.
- Verifying the cluster setup.
- Setting the number of replicas.
- Starting and stopping a cluster.

- Removing a node from a cluster.
- Managing large indexes.

Setting Up a Cluster During OpenSearch Installation

When you perform a fresh install of OpenSearch using the PeopleSoft Deployment Packages (DPK), the installation process enables you to set up an OpenSearch cluster with a single node or with multiple nodes.

For the step-by-step description of the installation process for your operating system, see *PeopleSoft Deployment Packages Installation for Search Components* for the current release.

During the installation process, you are prompted to specify various configuration parameters. If you are manually installing OpenSearch, you are required to edit the `opensearch.yml` file where you can specify values for the parameters pertaining to a cluster. The configuration parameters that are specific to a cluster are described here:

- A name for the cluster.
- List of host names where OpenSearch will be installed or is installed.

Naming the Cluster

The setup script prompts you to enter a name for the OpenSearch cluster.

If you are performing a manual installation of OpenSearch, you need to enter a value for the `cluster.name` parameter in the `opensearch.yml` file.

A cluster is identified by a unique name. This name is important because a node can only be part of a cluster if the node is set up to join the cluster by its name. Make sure that you don't reuse the same cluster names in different environments, otherwise you might end up with nodes joining the wrong cluster. For instance you could use `logging-dev`, `logging-stage`, and `logging-prod` for the development, staging, and production clusters.

Oracle PeopleSoft recommends a cluster with three nodes for high availability and to prevent a split-brain scenario. Then, depending on the hardware, memory availability, and search performance, you may add nodes to the existing cluster.

It is recommended to avoid having only two master-eligible nodes, since a quorum of two is two. Therefore, a loss of either master-eligible node will result in an inoperable cluster. To prevent the split-brain scenario, PeopleSoft recommends an odd number of nodes in the cluster, so configure the majority of nodes ($\text{total number of master-eligible nodes} / 2 + 1$).

List of Host Names where OpenSearch will be Installed or is Installed

The setup script prompts you to enter host names of nodes present in the cluster.

If you are performing a manual installation of OpenSearch, you need to enter a value for the `discovery.seed_hosts` parameter in the `opensearch.yml` file.

A node name is a symbolic name for identifying the node. Host name is the IP or DNS of the machine where the search engine is installed. Host names(or IP/DNS) are required for letting each search engine server know where it can ping and find other search engine servers during booting up.

Enter the host name for any nodes that are already members of a cluster. Enclose one or more host names in square brackets, with the host name or IP address in double quotes.

For example:

- For one host, you would enter: ["host1.example.com"]
- To list two or more hosts, use commas: ["host1.example.com", "192.0.2.1"]

High-level Steps to Set Up a Cluster

This section provides the high-level steps to set up a cluster when you are installing OpenSearch. For detailed instructions on steps 1 and 2, you may use the *PeopleSoft Deployment Packages Installation for Search Components* for the current release.

1. Obtain the OpenSearch DPK for your operating system.
2. Run the script to install OpenSearch. The script creates a cluster with one or multiple nodes, which you need to specify.

While installing OpenSearch ensure that you provide values for the three configuration parameters that are essential to set up a cluster, which are discussed in an earlier section.

- Cluster name.
- List of host names where OpenSearch is installed.

Note

To use a dedicated ML node for Semantic Search processing, configure the ML node as part of the OpenSearch cluster setup. For more information, see [Configuring a Dedicated ML Node](#).

3. Verify the cluster setup by executing the following command in a browser:

`http(s)://host:port/_cluster/stats?`

Where, host refers to the OpenSearch host.

Enter the OpenSearch user credentials (osadmin) when prompted for login information.

The cluster and node information can be found in the nodes/count/total section of the response.

Other methods to verify the cluster and node setup, which involves using the PeopleSoft Search Framework and PeopleSoft Health Center, are discussed in a later section of this topic. See [Verifying the Cluster and its Nodes](#).

To complete the search functionality setup, you will need to follow the post-installation instructions in the *PeopleSoft Deployment Packages Installation for Search Components* for the current release.

Also, refer to [Understanding PeopleSoft Search Framework Administration](#).

Upgrading Existing Cluster

PeopleTools 8.63 is integrated with OpenSearch version 3.2.0 and OpenSearch Dashboards version 3.2.0. Search Framework enables you to upgrade from the Elasticsearch 7.10 and Kibana 7.10 to OpenSearch and OpenSearch Dashboards 2.11.0 without requiring you to perform a full index build.

Note

Direct upgrade from Elasticsearch to OpenSearch 3.2.0 is not supported. To upgrade an existing Elasticsearch cluster to OpenSearch 3.2.0, you must first upgrade the cluster to OpenSearch 2.11.0. After successfully completing the upgrade to OpenSearch 2.11.0, you can then upgrade the cluster to OpenSearch 3.2.0.

You use the OSK DPK to upgrade from Elasticsearch to OpenSearch. You may choose to run the OSK DPK in interactive mode or in silent mode. The instructions to upgrade are described in *PeopleSoft Deployment Packages Installation for Search Components* for the current release.

Adding a New Node to an Existing Cluster

As determined by your business requirements for high availability and disaster recovery, you will need to determine the number of nodes appropriate for your installation. In addition to high availability and disaster recovery, system CPU and memory limitations may require addition of nodes to meet performance requirements. This section discusses how to add a node to your existing cluster.

To add a new node to an existing OpenSearch cluster, you should complete the following steps:

1. Install OpenSearch on a separate machine using the instructions provided for your operating system in the *PeopleSoft Deployment Packages Installation for Search Components* for the current release.
 - For the cluster name prompt, ensure that you enter the name of the existing cluster to which you want to add this node.
 - For the host names of existing nodes, ensure that you enter the host names of the existing nodes so that the new node will discover the other nodes in the cluster.

Complete the OpenSearch installation by following the steps described in *PeopleSoft Deployment Packages Installation for Search Components* for the current release. After completing the installation, verify the cluster and node setup.

2. Open the `opensearch.yml` configuration file of the existing nodes in the cluster and edit the following parameters.

Field or Control	Description
discovery.seed_hosts	Add the host of the new node to the existing list of hosts. OpenSearch nodes will find each other via unicast. Ensure that you enter the address in the correct format: ["host1", "host2"]. See List of Host Names where OpenSearch will be Installed or is Installed.

3. The `opensearch.yml` files of the existing nodes is updated with the host of the new node so that, in the future, whenever any of the nodes is restarted, the restarted node will be able to discover other nodes in the cluster.

Note

An .yml file uses space indentation, so ensure that you edit the file properly and save it.

4. On PeopleSoft Search Framework, add the details of the new node to the OpenSearch search instance on the Search Instance Properties page.

See [Working With Search Instances](#).

Verifying the Cluster and its Nodes

After setting up an OpenSearch cluster, you can verify whether a cluster and its nodes are created by using the OpenSearch Interact page.

Using OpenSearch Interact Page

The OpenSearch Interact page enables you to retrieve information from the search engine server regarding the statistics of a cluster and node among other information.

On the OpenSearch Interact page, in the **Service Type** drop-down list, select *Cluster* and in the **Cluster API** drop-down list, select `_cluster/stats?pretty=true`.

See [Administering OpenSearch Using the OpenSearch Interact Page](#).

Alternatively, you can verify the cluster setup by executing the following command in a browser:

```
http(s)://host:port/_cluster/stats?
```

Where, host refers to the OpenSearch host.

Enter the OpenSearch user credentials (osadmin) when prompted for login information.

The cluster and node information can be found in the nodes/count/total section of the response.

Description of Color Codes for OpenSearch Cluster

The status of the OpenSearch cluster is indicated by the following color codes:

- Green - Indicates that the OpenSearch cluster is fully operational. That is, all primary and replica shards are allocated.
- Yellow - Indicates a warning. All primary shards are allocated, but at least one replica is missing. Data is not missing, so search results will still be complete. However, high availability is compromised to some degree. If more shards disappear, data maybe lost.
- Red - Indicates that at least one primary shard (and all of its replicas) is missing. That is, data is missing and as a result searches will return partial results and indexing of the missing shard will return an exception.

Setting the Number of Replicas

In a multi-node cluster, you must ensure that the replica values are set correctly. You use the Search Options page to set the replica values.

On the Search Options page, when you specify a replica value, the replica value is applicable to a search instance and to the security index. Consider the following before you specify a replica value.

See [Managing General Search Options](#).

- Ensure that the replica value is set to 1 or greater than 1 so that in the event of a node failure data loss does not happen. The maximum number of nodes that can be down without loss of data will be equal to the number of replicas (replica count should be less than or equal to $N-1$), where N refers to the number of nodes in a cluster. Ensure that you set the replica value in all the nodes of a cluster.

 Warning

Oracle PeopleSoft recommends that you do not set the replica value to 0.

- You may set the replica value to greater than 1 if you have more nodes available. For example, if you have 4 nodes in a cluster, and you want to provide high availability even if two nodes fail, then you need to set the replica value to 2.

If the replica value for an index is greater than $N-1$ (where N is the number of nodes in the cluster), you may find that the status of the cluster as yellow indicating a warning that at least one replica is missing.

For a description of color codes for cluster status, see [Verifying the Cluster and its Nodes](#).

Starting and Stopping a Cluster

Starting a cluster would mean starting all the nodes of a cluster. Similarly, stopping a cluster would mean stopping all the nodes of a cluster.

You start or stop a node by starting or stopping the OpenSearch service on each node.

 Important

Before you stop a node, you should ensure that no indexing requests or administration-related tasks are being made on the cluster. If you stop a node during indexing, the cluster meta data might get corrupted and the cluster could become non-operational (red color code). To ensure that no instances of PTSF_GENFEED are running, check the Process Monitor. If all processes are completed, you may stop all the nodes in a cluster and make the required modifications. After completing the modifications, you may start all the nodes of the cluster.

Starting and Stopping a Node

You start or stop a node by starting or stopping the OpenSearch service on the node. Use the following steps to start or stop a node on Windows and on Linux.

Starting and Stopping the OpenSearch Service on Windows

On Microsoft Windows, the OpenSearch service is installed by the DPK setup script.

To start or stop an OpenSearch service:

1. Open a command prompt, and change directory to OS_HOME/bin.
2. To see the usage for the service command:

```
opensearch-service.bat install|remove|start|stop
```

- To start the OpenSearch service:

```
opensearch-service.bat start
```

- To stop the OpenSearch service:

```
opensearch-service.bat stop
```

Starting and Stopping the OpenSearch Service on Linux

To start or stop the OpenSearch service:

- In a terminal window, change directory to OS_HOME/bin.
- To start the OpenSearch process:

```
nohup ./OpenSearch &
```

- To stop the OpenSearch process:

1. Use this command to find the OpenSearch process ID:

```
ps -ef | grep opensearch
```

2. Use this command to stop the process, substituting the process ID for pid:

```
kill <pid>
```

Removing a Node from a Cluster

To safely remove a node from a cluster, perform the following steps:

1. Before you remove a node, ensure that each index has at least one replica. You can use the OpenSearch Interact page to verify the replica count by choosing `_cat/indices?v` option in the Cluster API drop-down list.
2. Identify the IP address of the OpenSearch node that needs to be removed from the cluster.

Open a command prompt window and execute the following command where X.X.X.X stands for the IP address of the node that needs to be removed and also replace the host:port with the IP or port of any of the nodes in the cluster.

```
curl -XPUT "http://<username:password@host:port>/_cluster/settings" -d '{
  "transient" : {
    "cluster.routing.allocation.exclude._ip" : "X.X.X.X"
  }
}'
```

3. When the command is executed, OpenSearch tries to move the existing shards out of the node that will be removed and moves it to other nodes in the cluster.
4. In a command prompt window, execute the following command to ensure that the relocation is complete and to validate that the `relocating_shards` attribute shows value as 0 (zero). Alternatively, you may use the `_cluster/health` option from the Cluster API drop-down list on the OpenSearch Interact page.

```
curl -XGET http://<username:password@host:port>/_cluster/health?pretty
```

For example, `$>curl -XGET http://esadmin:esadmin@example.com:9200/_cluster/health?pretty`.

```
{
  "cluster_name" : "OS_CLUSTER1",
  "status" : "green",
  "timed_out" : false,
  "number_of_nodes" : 3,
  "number_of_data_nodes" : 3,
  "active_primary_shards" : 630,
  "active_shards" : 635,
  "relocating_shards" : 0,
  "initializing_shards" : 0,
  "unassigned_shards" : 0,
  "delayed_unassigned_shards" : 0,
  "number_of_pending_tasks" : 0,
  "number_of_in_flight_fetch" : 0,
  "task_max_waiting_in_queue_millis" : 0,
  "active_shards_percent_as_number" : 100.0
}
```

5. Shutdown the node that was identified for removal.
6. Set the exclusion rules to empty so that, in the future, the removed node can be added back to the cluster and can be used to hold the shards.

```
curl -XPUT "http://username:password@host:port/_cluster/settings" -d
'{
  "transient" :{
    "cluster.routing.allocation.exclude._ip" : ""
  }
}'
```

7. On the Search Instance Properties page, delete the row corresponding to the removed node.

See [Working With Search Instances](#).

Managing Large Indexes

To improve overall performance of the search functionality, Oracle recommends that you specify a value for shards on the Search Options page (located on the Search Framework Administration menu).

OpenSearch enables you to distribute the indexed data into partitions. OpenSearch performs the distribution of indexed data into partitions, and it does not affect the indexing process in PeopleSoft Search Framework. The default value is 5 and it can be overridden.

4

Defining Search Definition Queries

Understanding Search Definition Queries

To define the PeopleSoft application data that end users can run their searches against, you use these standard PeopleSoft query design tools:

- PeopleSoft Query
- Connected Query

Using these tools provides a familiar interface for PeopleSoft implementation teams and a standard means of defining searchable data amongst all PeopleSoft applications. You will also need to make sure that the data you want to expose to Query is authorized by the Query Security Manager.

Note

If you are creating a search definition of the source type File Source or Web Source, you do not create a query or connected query to define the information to be indexed.

The data returned by the query/connected query serves as the source data that the search engine crawls to create the search index. If you want a particular field available for end user searches, you want to make sure that field is included in the list of fields of your query. Likewise, if you do not think a particular field is appropriate or useful to expose for end user searches, then you can make sure that field is not included in the list of fields for your query. This enables you to declare the scope of the search index and manage its size as well.

You do not need to create new queries solely for creating search definitions. You can re-purpose existing queries in PeopleSoft Query or connect multiple existing queries using Connected Query. Except for a handful of requirements for the Search Framework, queries used for creating search definitions are created exactly as you would any other query.

Queries need the following items defined for use with the Search Framework:

- List of fields to index from authorized records.
- "Last Updated" record field.
- Drilling URL.
- Prompt against the "Last Updated" field.
- Criteria for the "Last Updated" field.

This section describes the requirements and guidelines to follow when defining queries for use with the Search Framework. The PeopleSoft Query and Connected Query documentation is not duplicated within this guide. It is assumed that you have a working knowledge of those products.

Related Topics

- Query: PeopleSoft Query Overview
- Query: Creating New Queries

Understanding the Search Designer Activity Guide

This topic provides overview information about the Search Designer Activity Guide.

The Search Designer Activity Guide is a dashboard in the Search Framework where you can:

- Create search definitions
- Create search categories
- View search attributes

Other page elements that appear on the page are discussed elsewhere in this book.

Defining Search Definition Queries with PeopleSoft Query

This section discusses how to define search definition queries with PeopleSoft query.

Adding a “Last Updated” Field to Records

The application data to be indexed *must* exist in a record containing a column that tracks the update history of the data. This column is referred to as the “Last Updated” field. The Last Updated field is a datetime field that captures when the set of data to be indexed has been changed. Keeping track of the data updates is *critical* for enabling incremental indexing. Rather than recreating the entire index each time the index needs to be updated, incremental indexing enables the system to gather only the information that has changed since the last time the index generation process has run.

The system keeps track of when the index generation process last ran, and compares that time to the Last Updated field value in the underlying record structure. Based on the comparison between those time values, the system can isolate only the data that has undergone a change since the last index generation process run. Once the system creates the initial full index, only those rows that have been updated or added since the last index process run will be collected and added to the existing index. Using incremental index updates improves performance and decreases system overhead.

If the query being used for the search definition only runs against a single record, then that record must contain a datetime field to capture data update date and time values. If the data exists within a hierarchy of tables (grand parent, parent, and child, for example), only one of the records within the hierarchy requires the existence of the datetime field.

! Important

The Last Updated field *must* be of the type datetime. An example of this field is the LASTUPDTM field, which can be found in many delivered PeopleSoft applications. Whether you intend to implement an incremental indexing system or not, it is still a requirement to have a “last updated” field within the record.

Note

Many PeopleSoft application tables come with a LASTUPDTM field in place, especially those for which the application has provided search definitions. For any custom tables or tables that do not already track date and time updates, you need to ensure the field exists in the record or record hierarchy.

Note

For any search definitions delivered with your PeopleSoft applications, the underlying records will be configured to include the required datetime field as well as the program logic to ensure that the value of the datetime field is collected. For any custom applications, you will need to add the datetime field *manually*, alter the underlying SQL table, and include program logic to ensure the value of the datetime field is collected and updated accurately. For example, using SavePreChange PeopleCode you can test IsComponentChanged and if so, then update the LASTUPDTM field accordingly.

Specifying a List of Fields to Index

The query defines which fields will comprise the index for a search definition. When working in the query, use the Fields tab to determine if your list is complete. Keep in mind that fields in the index can be used for different purposes. While some fields are the ideal field against which end users would intuitively search (Customer Number, Order Date, and so on), others can be included for different reasons.

For example, some fields are used as metadata to help describe the data contained in the row (resume, invoice, sales order, and so on). Other fields are useful for security in restricting the viewing of the data only to users that have access to a certain type or level of data.

Because the underlying records require the existence of a datetime field to track the "last updated" value, the query must also contain the corresponding query field in the fields list.

Note

When using a query for component keyword searches, all search keys and alternate search keys for a component must be indexed. Select additional fields to be indexed as required by your business processes. Also keep in mind that some fields are codes and might need to be translated to their description for searching.

Important

When saving the query, make sure it is of a *Public* type.

Creating a Drilling URL

The drilling URL defines the URL, the target, for the search result. The drilling URL enables the end user to click the link in the search result to display the appropriate PeopleSoft application page, with the appropriate data populated in the page.

Note

Drilling URL must be unique because it is the document ID in the search engine. If it is not unique, data loss in the index may happen.

Note

OpenSearch has a restriction of 512 bytes for the maximum length of a document ID.

To create a drilling URL for Search Framework:

1. In PeopleSoft Query Manager, select the Expressions tab.
2. Click Add Expression.
3. On the Edit Expressions Properties dialog box, select Drilling URL from the Expression Type drop-down list.
4. Select the appropriate option for the type of drilling URL(s) you are creating.
 - Component URL: For creating the URL to components.
 - Attachment URL: For creating the URL to attachments.
 - Image URL: For creating the URL to images.

Note

For image URLs, also select the Query tab, select the Properties link, and select Image Hyperlink.

5. On the Select a Component page, provide the navigation to the appropriate page.
6. Click Search Keys to define which key(s) needs to be passed to launch the page to display the unique information automatically for a particular search result.

For example, Field Name = CUSTOMER ID and Key Value = A.CUSTOMER_ID.

Note

If you do not specify the correct search keys, the system will launch the page you have specified, but the user would still need to add the keys manually to view the information associated with a search result, which is not the desired behavior.

7. Click OK.

8. Click the Use as Field button to associate the Drilling URL as a field in the Query.

Note

Once you have clicked the Use as Field button, you must edit the 'created' field in the Fields table and give it an existing field name in your PeopleSoft database. Query will assign a temporary field name, but this should be changed for easier reference.

This example illustrates the fields and controls on the Edit Expression Properties dialog box. You can find definitions for the fields and controls later on this page.

Edit Expression Properties

Help

*Expression Type
Drilling URL

Expression Text

```
'psp///c/QE_NUI.QE_NUI_IMGPSRCH.GBL?
Action=U&QE_ORG_TC=%A.QE_ORG_TC%&PTCHART_NO
DE=%A.PTCHART_NODE%&PTPARENT_CHART_ND=%A.P
TPARENT_CHART_ND%'
```

Query URL Component URL

External URL Attachment URL

Free Form URL Image URL

REST URL

OK Cancel

When your expression is complete, click the Use as Field link in the Drilling URL grid on the Expressions tab. You should name the field with a valid field name, such as *DRILL_URL*. The field name should be valid in the PeopleSoft database.

See [Working with Attachment Properties](#) and [Working with Images](#).

Creating a Prompt for the Last Modified Field

You need to create a prompt for your query so that the system can use the last update date and time for enabling incremental index updates. This is required by the Search Framework

even if you do not intend to implement incremental index updates. The Application Engine program performing incremental index updates requires the valid prompt data. Use the prompt tab in Query Manager to create your prompt. On the Edit Prompt Properties dialog box, select the "last updated" from the Field Name drop-down list.

This example illustrates the fields and controls on the Edit Prompt Properties dialog box. You can find definitions for the fields and controls later on this page.

Defining Prompt Criteria

So that the prompt identifies the correct rows for incremental updates, you must also add query criteria based on the "last updated" field. Use the Criteria tab in Query Manager, and click Add Criteria. Set the criteria as described in the following table.

Item	Value Selected
Expression 1	- Field. - Your "last updated" field.
Condition Type	<i>not less than</i> (recommended) - greater than

Item	Value Selected
Expression 2	• Prompt • Your prompt

For example:

This example illustrates the fields and controls on the Edit Criteria Properties dialog box. You can find definitions for the fields and controls later on this page.

Edit Criteria Properties

Choose Expression 1 Type

☒ Field

☐ Expression

Expression 1

Choose Record and Field

A.ROW_LASTMANT_DTTM - Last Mod

*Condition Type greater than

Choose Expression 2 Type

☐ Field

☐ Expression

☐ Constant

☒ Prompt

☐ Subquery

Expression 2

Define Prompt

Prompt

New Prompt

Edit Prompt

OK

Cancel

Note

As with all queries, query security must be provided in order to access query information. See Query for more information.

Defining Search Definition Queries with Connected Query

You can also use Connected Query to develop your queries for Search Framework. Connected Query enables you to connect multiple queries together in a parent-child relationship, where the child queries filter results for the parent queries. Using Connected Query lets you connect numerous simpler queries, rather than writing one more complicated query. The smaller more modular queries can be reused in different queries.

When using Connected Query, only the top-level (or root) parent query needs to have the requirements described in this topic. The child queries do not require these elements. For example, only the parent query requires a Drilling URL defined.

For more information on the requirements for the parent query, refer to [Defining Search Definition Queries with PeopleSoft Query](#).

Defining a Deletion Query

In many cases, you may want to consider also writing a deletion, or pruning, query to keep the index and the transactional tables in sync with regard to rows that have been deleted from the transactional tables.

For example, assume a row exists in the transactional table for Big Company, and that row has been included in the search query criteria and indexed by the Search Framework crawler. Now, suppose that row gets deleted from the transactional table because Big Company went out of business and no longer exists. Because the row no longer exists in the transactional table, you do not want the previously indexed data to appear in a user's search results. In a search definition, you associate a deletion query for an index on the Advanced tab in the Define Query to Delete SBO section. There you specify the query name and the Drilling URL field for the deletion query.

For more information on the Drilling URL, see [Working With Advanced Settings](#).

The Delete query generates a feed containing only the records that need to be deleted from the index or those documents/records that are marked for deletion from the index. One method of capturing the deleted rows is to create an audit record on the transactional table in which a record of all deleted rows gets inserted into the audit table. The delete query would then capture the rows in the audit table and remove from the index the document entries matching those rows. The delete query also needs a datetime prompt which returns rows deleted after that datetime value.

Working with Images

The Search Framework supports the use of images in search results. In some cases, a particular set of search documents would be easier to sort by the end user with the help of images appearing just to the left of the search results. For example, this might be useful in procurement catalogs showing items that can be ordered, or perhaps in an employee directory showing pictures of employees.

To include images, you need to ensure your underlying query is referring to the image properly. Similar to creating a drilling URL to a component or attachment, you create a drilling URL pointing to the image field. When creating the drilling URL, on the Edit Expression Properties dialog box, select Image URL. Then you supply the query name and image field name, making sure to set the expression to Use as Field.

When creating the search definition, if an image URL has been associated with the query, the Image URL field appears in the Search Result Field Mapping group box, which you need to set, similar to setting the URL Link.

Related Topics

- [Defining Search Definition Queries with PeopleSoft Query](#)
This section discusses how to define search definition queries with PeopleSoft query.
- [Specifying General Settings](#)
Access the General page, by selecting **PeopleTools**, and then **Search Framework**, and then **Search Designer Activity Guide**, and from the left panel choose Search Definition.

Testing Your Search Definition Query

After you have defined your query in Query Manager with all the correct fields included along with the Search Framework requirements, you can test the query using the Run tab. This runs the query outside of the Search Framework, making sure the query is valid prior to incorporating it into a search definition.

This enables you to determine a variety of items, including:

- The correct rows are being returned by your query.
- The Drilling URL displays the appropriate page and data when clicked.
- You can open any associated attachments (if you can't open it from the query test results, then neither can the search engine nor the PeopleSoft Search Framework).

To test your query with the Run tab:

1. In Query Manager, with your query open, click the Run tab.
2. At the prompt, enter a valid value to run against the Last Modified field.

For example:

01/01/1900 0:0

3. View the results and click the Drilling URL and/or attachment links.

This example illustrates the fields and controls on the Query Manager Run tab.

Query Manager

New Window | Help | Personalize Page

RecordsQueryExpressionsPromptsFieldsCriteriaHavingDependencyTransformationsView SQLRun

Last Upd DtTm = 2023-05-23-00.00.00.000000

View All | Rerun Query | Download to Excel | Download to XML

First 1-100 of 19249Last

Row	Display Name	Job Code	Dept ID	Co	Location	ID	Drilling URL
1	Mark Webset	940062	11100	KUV	KUCA00	0047	http://dep10047.appsdev.fusionappsdpdx1.oraclevcm.com:8000/psph92860asx_newwin/EMPLOYEE/HRMS/c/HR_SRCH_GLOBAL_COMP_SRCH_LAUNCH.GBL?Page=COMP_SRCH_LAUNCH&Action=U&EMPLID=0047&EMPL_RCD=%25K.EMPL_RCD%25
2	GBT100001 BT Test	11000	2700	KTB	KTH001	100001	http://dep10047.appsdev.fusionappsdpdx1.oraclevcm.com:8000/psph92860asx_newwin/EMPLOYEE/HRMS/c/HR_SRCH_GLOBAL_COMP_SRCH_LAUNCH.GBL?Page=COMP_SRCH_LAUNCH&Action=U&EMPLID=100001&EMPL_RCD=%25K.EMPL_RCD%25
3	30198314 CFL ESP	790000	20000	KE1	KE01	30198314	http://dep10047.appsdev.fusionappsdpdx1.oraclevcm.com:8000/psph92860asx_newwin/EMPLOYEE/HRMS/c/HR_SRCH_GLOBAL_COMP_SRCH_LAUNCH.GBL?Page=COMP_SRCH_LAUNCH&Action=U&EMPLID=30198314&EMPL_RCD=%25K.EMPL_RCD%25
4	GBT400002 BT Test	11000	6000	KTM	KTRG01	400002	http://dep10047.appsdev.fusionappsdpdx1.oraclevcm.com:8000/psph92860asx_newwin/EMPLOYEE/HRMS/c/HR_SRCH_GLOBAL_COMP_SRCH_LAUNCH.GBL?Page=COMP_SRCH_LAUNCH&Action=U&EMPLID=400002&EMPL_RCD=%25K.EMPL_RCD%25
5	Janaki Williams	TQ0001	TQ004	TQA	T9CA	ATXKY02	http://dep10047.appsdev.fusionappsdpdx1.oraclevcm.com:8000/psph92860asx_newwin/EMPLOYEE/HRMS/c/HR_SRCH_GLOBAL_COMP_SRCH_LAUNCH.GBL?Page=COMP_SRCH_LAUNCH&Action=U&EMPLID=ATXKY02&EMPL_RCD=%25K.EMPL_RCD%25
6	Jake Autotaxintrnl	TQ062	TQ10200	TQA	TQ001	AUTOTAX113	http://dep10047.appsdev.fusionappsdpdx1.oraclevcm.com:8000/psph92860asx_newwin/EMPLOYEE/HRMS/c/HR_SRCH_GLOBAL_COMP_SRCH_LAUNCH.GBL?Page=COMP_SRCH_LAUNCH&Action=U&EMPLID=AUTOTAX113&EMPL_RCD=%25K.EMPL_RCD%25
7	Robert Simon	TQ021	TQ10500	TQA	TKY2	AXTKY01	http://dep10047.appsdev.fusionappsdpdx1.oraclevcm.com:8000/psph92860asx_newwin/EMPLOYEE/HRMS/c/HR_SRCH_GLOBAL_COMP_SRCH_LAUNCH.GBL?Page=COMP_SRCH_LAUNCH&Action=U&EMPLID=AXTKY01&EMPL_RCD=%25K.EMPL_RCD%25
8	Jerry Sienfeld	140005	10500	GBI	KUNY00	B-89BB-PB01	http://dep10047.appsdev.fusionappsdpdx1.oraclevcm.com:8000/psph92860asx_newwin/EMPLOYEE/HRMS/c/HR_SRCH_GLOBAL_COMP_SRCH_LAUNCH.GBL?Page=COMP_SRCH_LAUNCH&Action=U&EMPLID=B-89BB-PB01&EMPL_RCD=%25K.EMPL_RCD%25

4. Confirm that you arrive at the desired page with the appropriate data loaded as expected.

5

Creating Query and Connected Query Search Definitions

Creating Search Definitions

To create a search definition:

1. Select **PeopleTools**, and then **Search Framework**, and then **Search Designer Activity Guide**, and then **Define Search Definitions**.
2. Click Add a New Value.
3. On the Add New Search Definition page, enter a name for the search definition in the Search Definition field.
4. Select the appropriate value from the Source Type drop-down list.
 - *Query or Connected Query*: requires an existing PeopleSoft query or connected query that defines the scope of the application data to be indexed.
 - *File Source*: enables you to index files stored within an accessible file system.
 - *Web Source*: enables you to index content within the structure of a website.
 - *Activity Guide*: enables you to index activity guides.
 - *External Data Source*: enables you to index external data for integrating with PeopleSoft.
5. Click Add.
6. Complete the required settings for the search definition source type, and save the search definition.

Specifying General Settings

Access the General page, by selecting **PeopleTools**, and then **Search Framework**, and then **Search Designer Activity Guide**, and from the left panel choose Search Definition.

Alternatively, select **PeopleTools**, and then **Search Framework**, and then **Designer**, and then **Define Search Definitions**.

This example illustrates the fields and controls on the General Settings page. You can find definitions for the fields and controls later on this page.

General

Map Search Attributes

Attachment Properties

Security

Advanced

Component Mapping

General Settings

Search Definition

PTPORTALREGISTRY

Description

Navigator

Object Owner ID

PeopleTools

Source Information

Source Type

Connected Query

*Source Name

PORTALREGISTRY_CQ

View

Search Result Field Mapping

*Last Modified Date Time

A.LASTUPDDTTM

*URL Link

PORTAL_DRILLURL

*Image URL

IMG_DRILLURL

Title

%QUERYFIELD:PTPORTALREGISTRY:A.PORTAL_LABEL%

Title

Summary

%QUERYFIELD:PTPORTALREGISTRY:A.DESCR254%

Summary

Field or Control	Description
Search Definition	Displays the search definition's name as specified when adding a new value. Note: At least one search definition must use the same name as the search category to which it belongs.
Description	Provide any additional information to distinguish the search definition.
Source Type	Displays the type of query used to define the searchable data. Options are: Query or Connected Query.
Source Name	Displays the name of the base Query or Connected Query.

Field or Control	Description
View	Click to view the underlying query or connected query in either Query Manager or Connected Query Manager, respectively. This helps you to better understand the data being indexed by the search definition. When viewing the query or connected query from the PeopleSoft Search Framework, keep these items in mind: - To view the query or connected query, you must have the appropriate security permissions in place. - You cannot make changes to the query or connected query when accessing it from the PeopleSoft Search Framework. The View button is intended for informational purposes only.
Last Modified Date Time	Select the field specified in the query that determines the underlying record's update date and time. For example, LASTUPDDTMM.
URL Link	Select the query field containing the drilling URL defined for the query.
Image URL	Note: Ensure that the drilling URL is unique. Select the Drilling URL pointing to the image field, as defined in the drilling URL properties for the query. This field appears only if an image URL has been associated with the query.
Title	Define the title of the search result document. This is the bold, first line of the search result. Both Title and Summary should be granulated enough to be unique (that is, no duplicates among different documents). You can add text and bind variables to the title by clicking the *Title button. You cannot add text to the edit box directly. Note: The title must be unique, that is, no duplicates among different documents. See Adding Text and Bind Variables for Title and Summary
Summary	Define the summary, or body, of the search result text. This is the text that appears below the title in a search result document. You can add text and bind variables to the summary by clicking the *Summary button. You cannot add text to the edit box directly. Note: The summary must be unique, that is, no duplicates among different documents. See Adding Text and Bind Variables for Title and Summary

Field or Control	Description
Save As	Click to clone the search definition. In the subsequent page, you need to enter a name for the cloned search definition. When you clone a search definition, all the metadata associated with the existing search definition is saved in the cloned search definition. Note: The Save As button is not available when you create or define a new search definition.

Adding Text and Bind Variables for Title and Summary

In the Search Result Title and Search Result Summary pages, you can insert custom text and bind variables, or a combination of the text and bind variables to accurately express the content of the search result document. You can insert multiple bind variables and bind variable types within the title and summary text, as needed.

 Note

In a multi-language situation, only the base language structure for Title/Summary is respected. You cannot change the query fields to be displayed for different languages.

This example illustrates the fields and controls on the Search Result Title page. You can find definitions for the fields and controls later on this page.

Search Result Title

Query Fields

Query Field

Message Catalog

Message Set Number

☐ Use Explain Text

Message Number

System Variables

System Variables

Add

%QUERYFIELD:PTPORTALREGISTRY:A.PORTAL_LABEL%

OK

Cancel

Field or Control	Description
Query Field	Use the Query Fields drop-down list to select the desired fields from the underlying query of the search definition.
Message Set Number	Specify the Message Set Number to identify the message set to use.
Message Number	Specify the Message Number to identify the specific message to display.
Use Explain Text	By default, the message catalog text (that is, message text of the message catalog entry) is displayed. To use the message catalog explanation (that is, the description of the message catalog entry), select the Use Explain Text check box.
System Variables	Use the System Variables drop-down list to select the desired variable to display.
Add	Select Add to form the expression.

The Search Result Summary page contains similar fields.

Access the Map Search Attributes page, by selecting **PeopleTools**, and then **Search Framework**, and then **Search Designer Activity Guide**, and then **Search Definition** and selecting the Map Search Attributes tab.

This example illustrates the fields and controls on the Search Attribute Mapping page. You can find definitions for the fields and controls later on this page.

Search Technology
G47443-01
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Field or Control	Description
Field to Index	Select the fields that you want to be indexed by the search engine. These fields would be those that you intend the end users would include in search queries intuitively. Fields that you do not select are not indexed. The remaining columns in the grid become enabled only after selecting the Field to Index check box for a particular row. When selecting fields also consider fields that may help to group results or help distinguish security access. Consider the following when you select fields for indexing: • Number fields which are marked for indexing can be searched using the advanced search available on a component search, but cannot be searched using the global search. • For date and number fields that have multiple values, the condition between the values in the same document is always an OR condition. For example, if ST_DT>2010/01/01 and ST_DT<2000/01/01 and if ST_DT is a field with multiple values, then the effective condition will be ST_DT>2010/01/01 or ST_DT<2000/01/01, that is, documents which meet any of the conditions will be returned. Note: This does not impact single value fields.
Attribute Name	Displays the pre-defined attribute name that identifies the query field in the search engine. Note: The attribute name must be unique in a search definition. An Attribute Name is formed by concatenating the field name with its field label, unless the label is the default. If the field label is the default, just the field name is used for the attribute name. For example, if the field is VENDOR and the Display Name chosen is the default, then the attribute name is VENDOR. If the Display Name chosen is SUPP1 and it is not the default, then the attribute name is VENDOR_SUPP1. Due to this, there might be conflict between two fields which end up having same attribute name, and in these cases it is recommended to create a new label to make the attribute unique.

Field or Control	Description
Attribute Display Name	Determines how the attribute will display to the end user in the search results and in OpenSearch Dashboards. OpenSearch Dashboards uses the attribute display name as an alias when displaying the fields of a search definition for a visualization. Therefore, the attribute display name must be unique in a search definition. Note: The display name comes from the field labels associated with the Query Field Name. It cannot be entered manually. If the wording of the display name is not appropriate, you need to add a new field label. If you select a field that is not the default field label, the Attribute Name will change to reflect your choice. If you change the field labels for existing search definitions, you must perform an update operation for the search definition on the Deploy Search Definition page. Note: When creating search definitions be careful not to use the same Attribute Display Names that are used by search record key, alt keys, and list box items, unless their attribute name also matches the search record field name. Using the same display names affects how (if) fields appear to the end user on the Advanced search page.

Field or Control	Description
Vector Field	Select to use this field to generate vector embeddings for Semantic Search. Vector fields are used during indexing to create vector data that enables semantic, meaning-based matching in search results. Select only fields that contain meaningful descriptive text. Only string fields can be selected as vector fields. Attachment fields cannot be selected as vector fields.

Note

The Vector Field check box is enabled only for fields that are selected for indexing. The number of fields that can be selected as vector fields is controlled by the Vector Field Count setting on the Semantic Search General Settings page. After selecting or changing vector fields, redeploy the search definition and run a full index to generate vector embeddings.

For more information, refer to [Specifying Semantic Search General Settings](#).

If you select more than one attribute as a vector field, the system combines the data from those attributes into paragraph form and indexes it as a single vector. This approach reduces storage requirements and helps prevent potential performance issues that can occur when each attribute is vectorized separately.

If the combined content exceeds the tokenization limit supported by the selected embedding model, enable chunking to index all the data. Each additional chunk generates another vector, which increases storage requirements and associated resource usage.

Vector fields increase indexing time, CPU and memory usage, and index storage. Select vector fields only when the field content improves semantic search relevance.

Field or Control	Description
Is Faceted	Select to make this field a facet field, meaning that this field can be used to categorize and narrow down search results based on its value. Defining a field as a facet requires some consideration. Facets cannot be blank, so if a field is not required, then the query needs to be structured so that there are not any blank values. You can use defaults on the record, or build COALESCE statements on a view to populate a field with a default (such as 'None', "NA" or "Blank") if it contains a blank value. If a facet does not have a value, then the query is dynamically modified to return <i>No Value</i> as the title of the facet. This processing is performed only on character attributes; not on long and XLAT attributes. Note: Facets based on XLAT fields should be changed to use XLAT Long/Short in the query. Note: There is a data size limit of 2000 characters for faceted fields. The system truncates anything beyond 2000 characters. Important: Values with data types of datetime cannot be used as facets.
Is Hierarchy	(Appears only for Connected Query.) This parameter is used to define a "soft hierarchy" which is programmed in the query. Soft hierarchy or data driven hierarchy means the data in a search attribute can be separated by a slash (/) to specify hierarchy in the data, for example, USA/California/Pleasanton. Also, the search attribute must be selected as a facet. This is different from the "hard" hierarchy discussed in Hierarchy Path.
Hierarchy Path	(Appears only for Connected Query.) Displays the hierarchy path for a Connected Query, indicating where in the hierarchy of connected queries a particular query field resides. When defining a hierarchy, you start with the highest level (most general) field at the top and sequentially list more granular fields, with the most granular being at the bottom. Note: This is mainly used for hierarchical facets. The label in the user interface is determined by the field on which the hierarchy is defined. This is considered a "hard" (predefined) hierarchy.

Example: Define Hierarchy Path

This is an example of defining a hierarchy path.

This example illustrates the fields and controls on the Define Hierarchy Path page. You can find definitions for the fields and controls later on this page.

Define Hierarchy Path

Help

Query Name

QE_PERS_DATA

Source Field

A.QE_BIRTHCOUNTRY

Hierarchy Separator

/

Hierarchy

Personalize | Find |

First 1-3 of 3 Last

Sequence number	*Related Query	Query Field		
1	1 QE_PERS_DATA	A.QE_BIRTHCOUNTRY		
2	2 QE_PERS_DATA	A.QE_BIRTHSTATE		
3	3 QE_PERS_DATA	A.QE_BIRTHPLACE		

OK

Cancel

This definition is then displayed in the Hierarchy Path column of the Fields Included in the Index grid.

This example illustrates an example of hierarchy path.

A.QE_BIRTHCOUNTRY/A.QE_BIRTHSTATE/A.QE_BIRTHPLACE

Working with Attachment Properties

This section provides an overview of attachment processing and the attachment properties supported by PeopleSoft Search Framework.

Understanding Attachment Processing in Search Engine

PeopleSoft Search Framework downloads any attachment specified in a search definition, and pushes the encoded attachment data in the form of JSON document to the search engine. PeopleSoft Search Framework uses cURL handlers to transfer attachment data directly to the search engine bypassing the Integration Gateway. Search Framework uses libcurl library to communicate with the search engine. The transfer of data happens asynchronously, and each cURL handler can transfer data in parallel. You can specify the number of handlers on the Search Options page. The Schedule Search Index page displays an error if any data transfer does not proceed successfully. For more information, see [Managing General Search Options](#) and [Working with Search Indexes](#).

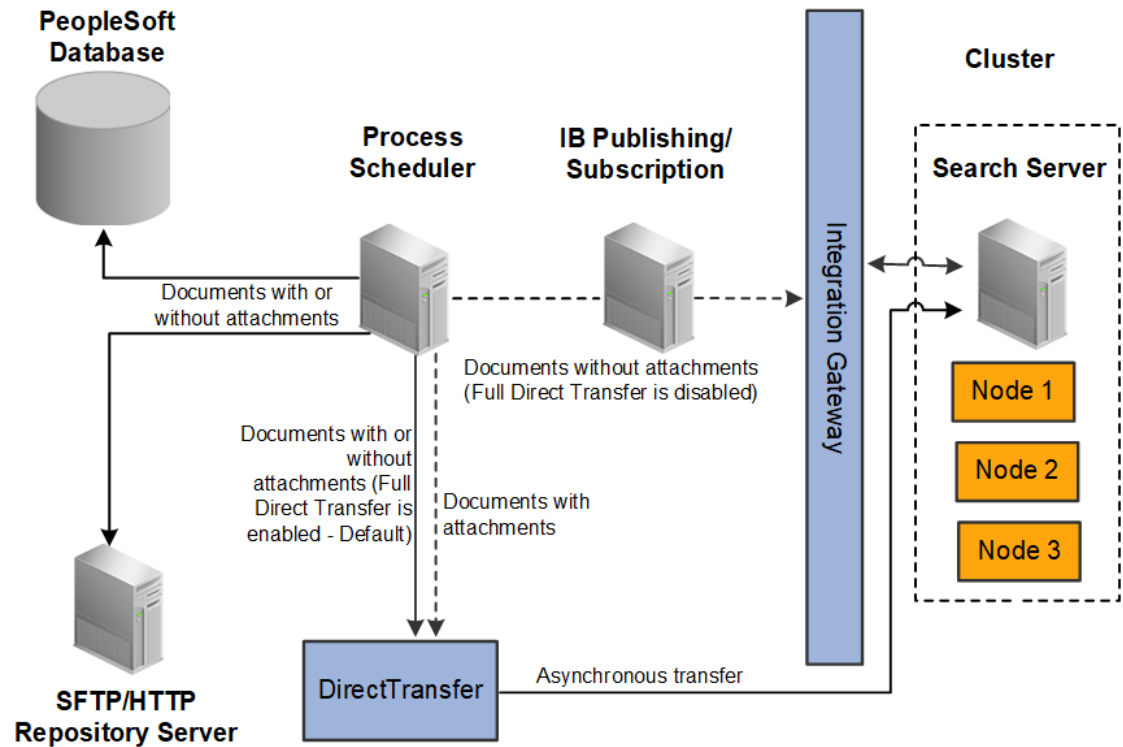
The search engine uses the ingest-attachment plug-in to extract the attachment contents. The attachment data is then indexed in the search engine.

Currently, the PeopleSoft Search Framework supports these file attachment storage location options:

- PeopleSoft database

- SFTP
- HTTP

The following graphic depicts PeopleSoft downloading attachment from database and attachment repository, and then pushing encoded data to the search engine. The search engine uses Mapper attachment plug-in to extract attachment contents for indexing.



Specifying Attachments in a Search Definition

Access the Attachments page by selecting **PeopleTools**, and then **Search Framework**, and then **Search Designer Activity Guide**, and then **Search Definition** and selecting the Attachment Properties tab.

You use the Attachments page to select options related to the attachments that will be indexed as part of your search definition.

This example illustrates the fields and controls on the Attachment Properties page. You can find definitions for the fields and controls later on this page.

General | Map Search Attributes | **Attachment Properties** | Security | Advanced | Component Mapping

Attachments

Search Definition: QE_PIASRCH_JOB_OPENINGS
Description: Job Openings For PIASRCH

Attachment Type	Attachment URL	URL Identifier	Query Name	URLID Query Field	File Reference Path	File Path Query Field	File Name Query Field	Edit
1 Dynamic URLID			QE_PIASRCH_JOB_OPENINGS	DEPTNAME				Edit

Add Attachment

Field or Control	Description
Attachments	The Attachments grid contains attachments you specify to be indexed as part of your search definition. These are the types of attachments supported: • Attachment URL • Static URLID • Dynamic URLID The options for each attachment type are described later in this topic where each attachment type is discussed.
Edit	Click to edit the properties of a previously entered attachment.
Add Attachment	Click to add a new attachment to the Attachments grid.

Important

If the attachment URL properties or the URL of the attachment storage location changes, the PeopleSoft Search Framework recognizes the changes, and during the next index build or index update, the system will update the deployed search definitions to reflect the updated attachment properties and URL information.

Related Topics

- [Creating the Attachment URL ID List](#)
Access the Attachment URL ID List page by selecting **PeopleTools**, and then **Search Framework**, and then **Search Admin Activity Guide**, and then **Administration**, and then **Attachment URL ID List**.

Excluding Attachment Search for an Index

Indexing data with attachments might increase the search server's storage and resource use, such as memory and CPU. These effects can degrade overall indexing performance and increase the time required to complete indexing. If there is no business need to search across attachments, the Exclude Attachments option can be used.

By default, the Exclude Attachments check box is unchecked, that is, the search definition is indexed with configured attachments. Therefore, keyword searches happen on attachments as well.

If you enable this check box, the indexing process excludes attachments.

Note

This check box is disabled for the search definitions that do not have configured attachments.

You use the Advanced Index Settings page to exclude attachment search for an index.

Complete these steps to exclude attachment search for an index:

1. Navigate to **PeopleTools**, and then **Search Framework**, and then **Search Admin Activity Guide** and from Administration in the left panel, choose Deploy/Delete Object.
2. On the Deploy Search Definition page, select the Index Settings link for the desired index.
3. On the Advanced Index Settings page, select the Exclude Attachments check box, and select OK to save your setting.

This example illustrates the Advanced Index Settings page where you exclude attachment search.

Advanced Index Settings ×

[Help](#)

Definition Name EOFD_FLUID_DISCUSSIONS

Number of Shards

Number of Replicas

Enable Stemming: ☒

Enable Synonyms: ☒

Exclude Attachments: ☐

Enable Chunking: ☐

OK [Cancel](#)

Specifying Attachment URL Properties

An Attachment URL type of attachment refers to attachments that are linked to the search definition by way of an Attachment URL type of drilling URL, specified on the Expression tab of PeopleSoft Query.

When using the Attachment URL type of attachment, the system uses the call-back credentials, defined for the search engine instance, to access the location of the attachment

files. For example, if your attachments are stored in a SFTP server, the SFTP server needs to have the search engine call-back credentials configured as a valid user.

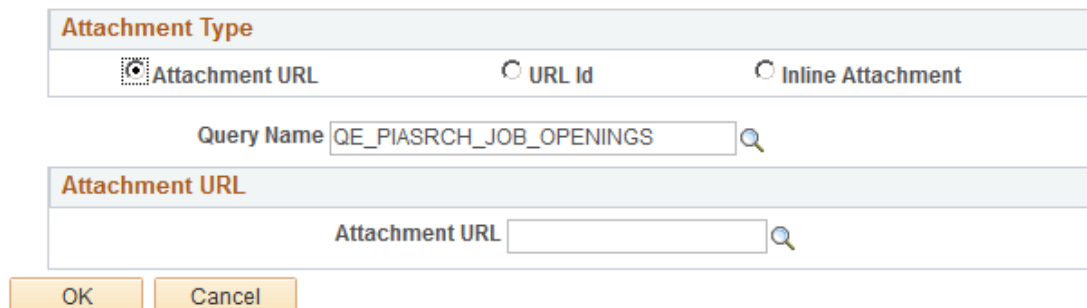
Note

The drilling URLs are different depending on the attachment repository type (database, SFTP, and so on), but in all cases the system uses call-back user credentials to access the files.

Access the properties for this type of attachment by clicking the Add Attachment or Edit button on the Attachments page.

This example illustrates the fields and controls on the Define Attachment Properties: Attachment URL. You can find definitions for the fields and controls later on this page.

Define Attachment properties



Field or Control	Description
Attachment URL	Select if the attachment is linked to the search definition through a drilling URL in the underlying query as specified on the Expression tab in PeopleSoft Query.
Query Name	Select the query in which the Attachment URL drilling URL is defined.
Attachment URL	Select the query field in which the drilling URL query expression exists.

Specifying Static URL ID Attachment Properties

A Static URL ID type of attachment refers to an attachment that is associated with a URL ID that is static, or unlikely to change. You select the URL ID from the URL list defined by the Attachment URL ID List (**PeopleTools**, and then **Search Framework**, and then **Search Administrator**, and then **Attachment URL ID List**). For a Static URL ID type, the URL is generated from a URL ID (static) and a constant file reference path. This makes the URL always constant, and the file name changes based on the value received from the query field.

This example illustrates the fields and controls on the Define Attachment Properties: Static URL. You can find definitions for the fields and controls later on this page.

Define Attachment properties

Attachment Type

☐ Attachment URL ☒ URL Id ☐ Inline Attachment

Query Name

URL Id

URL Id Type

URL Identifier

File Reference Path

File Name Query Field

OK

Cancel

Field or Control	Description
URL ID	Select if your attachment is associated with a URL ID, not an Attachment URL expression defined in PeopleSoft Query.
Query Name	Select the query name in which this attachment is referenced.
URL ID Type	If the URL ID is constant and unlikely to change, select <i>Static</i> .
URL Identifier	Select the URL Identifier from the drop-down list. This list is populated by the list defined by the Attachment URL ID List (PeopleTools , and then Search Framework , and then Search Admin Activity Guide , and then Attachment URL ID List). These URLs are a subset of the URLs defined in the PeopleSoft database, and this subset are those URLs identified to be used with the PeopleSoft Search Framework.
File Reference Path	(Optional) Enter a file reference path for mapping a dynamic file path.
File Name Query Field	Select the query field that will contain the name of the attached file.

Specifying Dynamic URL ID Attachment Properties

With a dynamic attachment type, all the components of a URL are generated from the value in query field. With a dynamic attachment type, much of the information related to the attachment is unknown prior to the transaction occurring.

For example, with a static attachment type, it is known beforehand what the URLID will be, so it can be specified when the attachment properties are set. With a dynamic attachment type, the values of the attachment properties are determined at the transaction time, and the property values, such as URLID, file reference path, and attachment file name, are stored in the row of data associated with the attachment. The attachment property values can vary between rows.

This example illustrates the fields and controls on the Define Attachment Properties: Dynamic URL. You can find definitions for the fields and controls later on this page.

Define Attachment properties

Attachment Type

☐ Attachment URL ☒ URL Id ☐ Inline Attachment

Query Name

URL Id

URL Id Type

*URLID Query Field

File Path Query Field

File Name Query Field

OK

Cancel

Field or Control	Description
Query Name	Select the query name in which this attachment is referenced.
URL Id Type	If the URL ID is not constant and likely to change, select <i>Dynamic</i> .
URLID Query Field	Select the field in the query that will hold the URL ID of the attachment storage location.
File Path Query Field	Select the field in the query that will hold the URL ID of the attachment file reference path.
File Name Query Field	Select the query field that will contain the name of the attached file.

Specifying Inline Attachment Properties

! Important

The Inline Attachment option is desupported, and this option should not be used. However, the Inline Attachment option is retained for backward compatibility. PeopleSoft Search Framework supports the Inline Attachment option in the event that you use a SES-based search definition that contains attachments specified as inline attachments.

Managing Search Definition Security

Access the Security page by selecting **PeopleTools**, and then **Search Framework**, and then **Search Designer Activity Guide**, and then **Search Definition** and selecting the Security tab.

This example illustrates the fields and controls on the Security page. You can find definitions for the fields and controls later on this page.

General

Map Search Attributes

Attachment Properties

Security

Advanced

Component Mapping

Security Settings

Search Definition

ITEMDEFN

Description

Item Definition

Security Option

☒ No Security

☐ Source Level Security

☐ Document Level Security

The Security page enables you to restrict access to search results generated by a search definition. Depending on the sensitivity of the search results, you can set these degrees of security:

Field or Control	Description
No Security	Select to define no security restriction for a search definition's search results. Anyone with access to the application can view the search results for a search definition set to No Security. That is, the search results are public to all users.
Source Level Security	Select to allow or restrict access to the entire search definition as per the specified user or role. That is, only specified users and roles are able to view search results for that search definition.

Field or Control	Description
Document Level Security	Select to restrict access to specific search results (documents) generated by a search definition. That is, with document level security, users can view search results generated by that search definition, but only the documents to which they have access. Note: This is generally referred to as row-level security in PeopleSoft applications.

Setting Source Level Security

Access the source-level security settings by selecting the Source Level Security radio button.

This example illustrates the fields and controls on the Security page - Source Level Security options. You can find definitions for the fields and controls later on this page.

General | Map Search Attributes | Attachment Properties | **Security** | Advanced | Component Mapping

Security Settings

Search Definition: ITEMDEFN
Description: Item Definition

Security Option

☐ No Security ☒ Source Level Security ☐ Document Level Security

Source Level

User/Role Mapping Personalize | Find | 1-2 of 2 | First | Last

	*Type	Name	*Privilege		
1	Role	QE_CECLRK_ROLE	Allow	+	-
2	User	QETSTR	Allow	+	-

Field or Control	Description
Type	Select <i>Role</i> or <i>User</i> depending on the scope of your intended access restriction. Selecting <i>Role</i> restricts access to a specific PeopleSoft role. Selecting <i>User</i> restricts access to a specific PeopleSoft user.
Name	Select the user or role name.
Privilege	Define the access privilege or restriction. - Allow. The specified role or user is allowed to view search results for this search definition. - Deny. The specified role or user is not allowed to view search results for this search definition.

Note

Source-level security applies to every document within that search definition for the search engine.

Setting Document Level Security

Access the document-level security settings by selecting the Document Level Security radio button. Document-level security can also be thought of as attribute-based security.

With document-level security, one or more PeopleSoft Query columns act as the security attribute. The security attribute is cached on the search engine for each document. Only those users who have the correct security attribute will have the document returned. You can then specify an application class (AppClass) that 'returns a list of security values for the current user. The Appclass is called when the user submits the search request.. When the user submits the search request, the search engine compiles a list of values returned from the application class associated with that specific user to build the security filter.

This example illustrates the fields and controls on the Security page: Document Level Security option. You can find definitions for the fields and controls later on this page.

General

Map Search Attributes

Attachment Properties

Security

Advanced

Component Mapping

Search Definition

PTPORTALREGISTRY

Description

Navigator

Security Option

No Security

Source Level Security

Document Level Security

Document Level

Query Field Mapping

Personalize | Find | First 1 of 1 Last

Query Name	Source Field	Attribute Name	Privilege
1 PTPORTALREG_SEC	A:PORTAL_SECTYPE	PORTAL_SECTYPE	Allow

Document Filter App Class

Package Name:

PTPORTALREGSEC

Path:

:

Class ID:

UserPermission

Document Level

Field or Control	Description
Query Name	Select the name of the query or connected query containing the fields you want to use to restrict access.

Field or Control	Description
Source Field	Select the field which will identify security values which will determine access. The source field(s) selected becomes the security attribute having the specified privilege. At indexing time, when the crawler inserts application data into the index, the values populating the selected source field(s) will carry the specified privilege.
Privilege	Define the access privilege or restriction. • Allow. The value specified in the Source Field is allowed access to the data for this row in the search results. • Deny. The value specified in the Source field cannot see the data for this row in the search results. Note: The privilege of Deny is useful in situations where there are too many values for the security attribute if Allow were selected. For example, rather than enabling access to nine out of ten field values, it is more efficient to deny access only to the one you want to restrict. Note: If multiple attributes appear in the grid the system effectively inserts an AND clause between the items in the grid.

Document Filter App Class

The application class specified in the Document Filter App Class section creates a list of values for the specific user performing the query. The application class enables you to define and run additional filters and logic against the application data contained in the indexed source fields.

As needed, PeopleSoft applications will provide filtering App Classes for delivered search definitions. For any custom search definitions, or additional filtering requirements, you will need to create or modify the filtering App Classes.

Field or Control	Description
Package Name	Select the name of the appropriate App Package.
Path	Select the path pointing to the App Class.
Class ID	Select the class ID for the App Class.

For example, assume you want to compile a list of valid setIDs to which the user may have access. You define an application package that would contain a method called `evaluateAttrValues`. This passes the search definition name (`sboName`), the name of the security attribute field that was identified in the search definition, and the user who will access the data. The application method would then build a list of valid values for that user and return it to search engine for comparison against the data to see if the attribute value on the data matches.

```
method evaluateAttrValues
    /+ &sboName as String, +/
```

```

/+ &secAttr as String, +/
/+ &srchUser as String +/
/+ Returns Array of String +/
/+ Extends/implements
PTSF_SECURITY:SearchAuthnQueryFilter.evaluateAttrValues +/
Local array of string &secValues;
Local string &Role, &userPref, &csFullAccess, &csAdminAccess, &OnBehalfOf,
&docOwner, &BU_Security, &Security_Type, &SID_Security, &PermList;
Local SQL &sqlRoles, &sqlUserPrefs, &sqlDocOwners;
&secValues = CreateArrayRept("", 0);
/*&BU_Security, &Security_Type, &SID_Security*/
SQLExec("Select SETID_SECURITY, SECURITY_TYPE
from PS_INSTALLATION_FS ", &SID_Security,
&Security_Type);
If &SID_Security = "N" Then
    &secValues.Push("A:ALL");
Else
    Evaluate &Security_Type
    When "N"
        &secValues.Push("A:ALL");
    When "O"
        &secValues.Push("U:" | &srchUser);
    When "C"
        SQLExec("Select OPRCLASS from PSOPRDEFN where OPRID = :1",
        &srchUser, &PermList);
        &secValues.Push("P:" | &PermList);
    End-Evaluate;
End-If;
End-method;

```

Note

Concatenating multiple attribute values using a separator, you can achieve an OR clause between attributes. For example, in the this sample "A:ALL" and "U:" | &srchUser are two different attributes merged into a single attribute to achieve the OR clause.

Note

To achieve improved performance, the security attribute should be chosen in such a way that no more than 50 values are returned per user per attribute.

Working With Advanced Settings

Access the Advanced page by selecting **PeopleTools**, and then **Search Framework**, and then **Search Designer Activity Guide**, and then **Search Definition** and selecting the Advanced tab.

This example illustrates the fields and controls on the Advanced Properties page. You can find definitions for the fields and controls later on this page.

General

Map Search Attributes

Attachment Properties

Security

Advanced

Component Mapping

Advanced Properties

Search Definition

PTPORTALREGISTRY

Description

Navigator

☐ Disable Security Join

☐ Real Time Indexing Available

Define Query to Delete SBO

Query Name

PTPORTALNOTVALID

URL Link Field

POTAL_DRILLURL

Pre Processing AE Library

AE Library

PORTALPATHAE

AE Section

FillPath

Portal Registry Path Update AE

Post Processing AE Library

AE Library

AE Section

Index By Data Partition

AE Library

AE Section

Staging Table Settings

Staging Table Name

Temporary Table Name

Encode Search Attributes

	Search Attribute	Attribute Display Name		
1			+	-

Full Indexing Criteria

Index Only Last

0

Days

Index Start Date

01/01/1900

Alternate search keywords

Save

Save As

Field or Control	Description
Disable Security Join	Select the check box to disable row-level query security join while performing the indexing process.

Field or Control	Description
Real Time Indexing Available	Indicates whether the search definition is enabled for real-time indexing or not. If this check box is disabled, the search definition is not available for real-time indexing. For the list of search definitions excluded from real-time indexing, see Excluding Search Definitions from Real-Time Indexing .

Define Query to Delete SBO

Field or Control	Description
Query Name	Select the query that you've defined to remove orphaned search documents. This is your deletion query. For example, for rows of data that have been deleted from the database, you would want to ensure that those rows of data (or search result documents) no longer appear in the search index. Note: Even though this query is defined the same way as the source type query is defined, the difference is that the result of the query is used for deleting the already indexed documents from the search engine. The Drilling URL field acts as the primary identifier to locate the documents to be deleted. This means the drilling URL must be identical to the drilling URL built for the original query. Delete SBO Query will not be executed during the first index build of a search definition. It only becomes active after the initial index is populated. See Defining a Deletion Query .
URL Link Field	Select the drilling URL field for the query selected.

Pre Processing AE Library

Before an index build is run, data can be manipulated to perform additional tasks. For example, it may be required to search through subqueries to determine if one or more subquery might have changed and to update the last updated datetime value on the parent so that the change is recognized. Another use might be to calculate or summarize a value to be indexed. Another common case for pre processing occurs when a query is created based on staging tables. In this case the pre processing Application Engine program can be used to populate the staging tables. This is useful when the data cannot be retrieved using a simple query (such as hierarchal or computed data).

You can define an Application Engine routine to perform these tasks.

Note

Pre and post processing adds to the overall indexing time, and it is recommended not to use this in scenarios where it can be avoided.

Note

Application Engine programs used for pre or post processing should be defined as type Library.

Field or Control	Description
AE Library	To call additional processing logic from Application Engine, specify the correct AE Library (Application Engine program) to run.
AE Section	Specify the Application Engine program section to run.

Post Processing AE Library

After an index is built, certain clean-up functions might need to be performed, such as removing the records in your delete query, or cleaning up staging tables. Use the post processing Application Engine routine to perform these functions.

Field or Control	Description
AE Library	To call additional processing logic from Application Engine, specify the correct AE Library (Application Engine program) to run.
AE Section	Specify the Application Engine program section to run.

Index By Data Partition

Index By Data Partition indexes large volumes of data with equal-sized partitions in parallel. You can change the number of parallel instances based on the number of AE server processes and temporary table instances. In order to use the Index By Data Partition option, you must specify the values for the available field.

This feature is applicable only to search definitions with a data source as a connected query.

Note

Index By Data Partition is applicable only when the connected query property *SupportsOrderBy* is True.

Note

PeopleSoft Applications that have adopted data partitions for their search definitions have already delivered appropriate settings. See *PeopleSoft 9.2 Application PeopleBook* for more information.

Field or Control	Description
AE Library	Specify the AE Library to populate the staging table with the keys of all the documents that need to be indexed. To establish parallel processing, the rows should be assigned with a partition number using the meta sql %RandomNatural. AE library sample code: <pre> /* * Code Snippet for Index by Data Partition Library * Populate staging table and assign partition number * Staging Table PS_DP_STG_JOB * Columns of staging Table are: - QE_JOB_OPENING_ID - PROCESS_INSTANCE - PTSF_DP_NBR * Clean Staging Table * Populate staging Table * Assign Partiton Number; use %RandomNatural to assign partition number */ /* Clean Staging table*/ SQLExec("DELETE FROM PS_DP_STG_JOB"); SQLExec("COMMIT"); /*Get number of partitions as configured in the run control page*/ Local number &nPartCnt = PTSF_DP_SDL_AET.PTSF_DP_PARTCNT.Value ; /*Populate Staging Table and assign partition number*/ SQLExec("INSERT INTO PS_DP_STG_JOB (qe_job_opening_id,PROCESS_INSTANCE,p tsf_dp_nbr) select qe_job_opening_id , 0,%RandomNatural(:1) from PS_QE_ALL_JOBS_VW ", &nPartCnt); SQLExec("COMMIT"); </pre> Note: You must associate the temporary table name with the AE Library.
AE Section	Specify the Application Engine program section to run.

Field or Control	Description
Staging Table Name	Specify the Staging Table Name to store the keys of the document to index. The staging table should have a structure with the application keys and the subrecord PTSF_DP_STG_SBR.
Temporary Table Name	Specify the Temporary Table Name to store the keys of the document to index. The temporary table should have a structure with the application keys and the subrecord PTSF_DP_STG_SBR.

Encode Search Attributes

Use the encode option in place of setting up custom lexers for applications that have indexed code-based fields for search attributes. Encoding these values enables the system to process the codes when generating the feed for the search index without requiring staging tables or a pre-processor Application Engine program. Encoding keeps words intact for indexing and searching that otherwise might be split during the parsing process of search index generation.

For example, a code-based search field, expects the end user to enter a code, known to the application users, that may not be interpreted as a single value by the search engine. In which case, the search engine may index the code as multiple values, losing the meaning of the code. For example, perhaps there is a product version represented by the code "M-2000". If the search engine indexes this code as two separate values, "M" and "2000" rather than "M-2000," the code loses its meaning and it no longer serves as a useful search attribute. In this case, if added to the Encode Search Attributes grid, PeopleSoft Search Framework encodes the "M-2000" value (to Mx2000 for example) so that it is indexed as a single value. While the value may be encoded for the search engine, the end user enters the code when searching as normal, requiring no knowledge of how the code is represented for the search engine indexing purposes.

If encoding search attributes, keep these items in mind:

- Encoded attributes are not exposed to the end user. The system uses encoded values only for programmatic operation.
- The search engine has a token limit of 64 bytes, so fields with more than 30 characters cannot be encoded. In a hierarchical value, use a word separator character to ensure the end value does not exceed 64 bytes.
- For these values, the system encodes the search string using EncodeSearchCode PeopleCode before passing the filters to the search API.
- For indexes containing encoded values, there can be slight overhead related to index size and query performance.

Note

Do NOT use encoded search attributes unless you are prepared to customize the underlying code. Encoded search attributes should never be displayed on a page, therefore, be careful what attributes you encode.

Full Indexing Criteria

Field or Control	Description
Index Only Last <> Days	Enter the number of days for which you want to build the index. The number of days entered are treated as days prior to the current date. The default value is 0.
Index Start Date	The Index Start Date is calculated based on the number of days you enter in the Index Only Last <> Days field. The Index Start Date displays the date after deducting the number of days entered in the Index Only Last <> Days fields from the current date. The index will be built from the date that is displayed in the Index Start Date field. When the value of the Index Only Last <> Days field is 0, which is the default value, the Index Start Date is set to 01/01/1900.

Alternate Search Keywords

Field or Control	Description
Alternate search keywords	Enter any alternate search keywords that users are likely to submit when running search requests. For example, rather than submitting the more official "purchase order" phrase, a user may be more likely to search on "PO" instead. This field is translatable. If supporting multiple languages, the keywords need to be translated.

Mapping Components to Search Definitions

Access the Component Mapping page by selecting **PeopleTools**, and then **Search Framework**, and then **Search Designer Activity Guide**, and then **Search Definition** and selecting the Component Mapping tab. The Component Mapping page enables you to map a component to a specific search definition to enable the search engine integration with Search Pages.

Mapping a component to a search definition effectively assigns component level security to the search definition. For this reason, if the Search Definition is assigned to a component, document level security is turned on by default.

Note

Multiple components can be mapped to the same search definition. When a component is mapped, the security type is changed to document level security, and a user having access to any one of the components will be able to search inside the search index. The security type cannot be changed, but you can add more security attributes to extend the security.

! Important

Search definitions mapped to a component must use document level security.

This example illustrates the fields and controls on the Component Mapping page. You can find definitions for the fields and controls later on this page.

General

Map Search Attributes

Attachment Properties

Security

Advanced

Component Mapping

Search Definition

ITEMDEFN

Description

Item Definition

Component Mapping

Personalize | Find | View All | | | First | 1 of 1 | Last

*Market	*Component Name	Description	Search Criteria
1 Global	MERCHANTCATTBL		

Field or Control	Description
Market	Select the Market for the component.
Component Name	Select the component.
Search Criteria	Enter any additional custom search criteria to be added automatically to the search engine search query during a Search Pages keyword search. The search criteria should take the form ATTRIBUTENAME:VALUE and can use keywords and brackets. For example: <i>PTSF_SBO_NAME:EP_AP_VENDOR & (-STATUS:PND)</i> Note: The system appends additional search criteria as is to the search query. The Search Criteria field is "free text." The Search Framework performs no validation or parsing during design time or run time.

Viewing Search Attributes

Access the Search Attributes page by selecting **PeopleTools**, and then **Search Framework**, and then **Search Designer Activity Guide**, and then **View Search Attributes** and selecting the Display Fields tab. Search attributes are used for creating aliases of the actual search query fields from PeopleSoft Query or Connected Query in the Oracle RSS feeds.

Only these three data types are supported:

- String
- Number
- Date

PeopleTools maps the PeopleSoft data types to the search engine data types. The Search Attributes page displays a search attributes mapped search engine data type.

This example illustrates the fields and controls on the Search Attributes page. You can find definitions for the fields and controls later on this page.

Search Attributes

Search Attributes					Personalize	Find	View 100			First	1-7 of 872	Last
Search Attribute	Field Name	Attribute Display Name	Data Type	Related Search Definitions								
1 ACCOMPLISHMENT	ACCOMPLISHMENT	Accomplishment	String	Related Search Definitions								
2 ACCOUNT	ACCOUNT	Account	String	Related Search Definitions								
3 ACCOUNTING_DT	ACCOUNTING_DT	Accounting Date	Date	Related Search Definitions								
4 ACCOUNTING_PERIOD	ACCOUNTING_PERIOD	Accounting Period	Number	Related Search Definitions								
5 ACCT_PERIOD_CHAR	ACCT_PERIOD_CHAR	Accounting Period	String	Related Search Definitions								
6 ACQUISITION_DT_SES_ACQ_DT	ACQUISITION_DT	Asset Acquisition Date	Date	Related Search Definitions								
7 ACQUISITION_DT_YR_H	ACQUISITION_DT_YR	Asset Acquisition Date	String	Related Search Definitions								

The search attributes page is read-only and provides a quick view of all attributes currently authorized for sending to the search engine. Every time a field is mapped in a Search Definition, the system adds an entry to this grid for the field. Because a field can exist on more than one search definition, it is not generally removed from this grid.

Search attributes are retained separately from a search definition and this enables:

- **Reusability.** You can reuse the same search attributes amongst multiple search definitions.
- **Increased usability.** Search attributes enable you to modify the attribute name or query field name from the end user, who will see the attribute display name. For example, adding the display value of "Employee ID" is more readable and understandable than displaying the field name EMPLID.
- **Quick Access.** You can view and sort all search attributes in the system and check their data types without having to open the search engine or Application Designer. You can also view the search definitions associated with the search attribute by clicking the Related Search Definitions link.

6

Creating File Source Search Definitions

Understanding File Source Search Definitions

File source definitions enable you to specify the location where external files reside in an accessible file system that you want to make available to the search engine crawling mechanism so that end users can search the content of these files to support PeopleSoft applications. Examples of external file types that can be indexed include Microsoft Word and Excel documents, plain text documents, HTML files, and so on.

Specifying File Source General Settings

Access General Settings page by selecting **PeopleTools**, and then **Search Framework**, and then **Search Designer Activity Guide**, and then **Search Definition** and selecting a Source Type of *File Source*.

Use the General Settings page to specify the location of the files to be indexed as well as the crawler settings.

This example illustrates the fields and controls on the File Source: General Settings page. You can find definitions for the fields and controls later on this page.

General

Document Types

General Settings

Search Definition QE_FILE_PIASRCH

*Description File type for piasrch testing

Source Type File

Object Owner ID PeopleTools

Starting URLs (file://localhost/)

Personalize | Find |   First  1-2 of 2  Last

Starting URL		
1 file://localhost/ds1/products/files/		
2 file://localhost/mount/ptqa/ptqa_unix/PS_APP_HOME/PT854/PIASRCH_FILES/		

Crawler Settings

Crawler Timeout (Seconds) 30

Default Language English

Max Document Size (MB) 10

☐ Enable Language Detection

File URL Prefix file://localhost/ds1/products/

Display URL Prefix https://webhost/clients/

Field or Control	Description
Description	Add a brief description to help identify the purpose of the search definition.
Source Type	Displays the type of search definition, such as Query, Web, File, and so on.
Starting URLs	In the Starting URLs grid enter the location(s) in your file system where the files reside that you want to expose to the Search Framework crawling process. For each different location, add a new row to the grid. Note: The starting URL is not case sensitive. Note: For the search engine crawler to access the URL, the file starting URL must be fully qualified, as in file://localhost/. On UNIX the starting URL format is: - To crawl local files use file://localhost/<directory structure>. For example: file://localhost/recruitment/resume/ - To crawl from mounted file systems use file://localhost//<mounted_dir_path>. For example: file://localhost//dfs/recruitment/resume/ On Windows the starting URL format is: - To crawl local files use file://localhost/<Directory_Path>. For example: file://localhost/D:/recruitment/resume/ - To crawl from a mapped drive use file://localhost//<machinename>/<shared_folder_path>/. For example: file://localhost//RTDC78067TLSBLD/recruitment/resume/ A search engine can crawl files on directories located on the server where the search engine is installed or network file paths accessible by the search engine. When the search engine crawls files from a network drive, then the Oracle process/service should be started as a user who has access to the network drive, which you can accomplish by modifying the logon account of OracleServiceSID and OracleSIDTNSListener services to match the domain administrator and restart both services. In the OpenSearch implementation, when the search engine crawls files from a network drive, then the Oracle process/service should be started as a user who has access to the network drive; the user must have at least read access to the network drive.
Crawler Timeout	Indicates the maximum allowed time to retrieve a file for crawling.
Max Document Size	The maximum document size in megabytes that the system will crawl. Larger documents are not crawled.

Field or Control	Description
Enable Language Detection	By Enabling Language Detection, the search engine automatically identifies the language of the document content and assigns the language code automatically. If the search engine crawler cannot determine a perfect match, it finds a best match from the trained set of languages and assigns. Otherwise the default language in the crawler configurations will be assigned. Note: In the OpenSearch implementation, automatic language detection is supported for all languages that are supported by PeopleSoft.
File URL Prefix	The part of the access URL the system will not display in the search results due to security reasons. This is an optional feature where there is a need to hide the actual URL used for indexing. If a File URL Prefix is specified it is mandatory to have the Display URL Prefix set.
Display URL Prefix	The URL the system displays instead of the actual URL. For example, if the file URL is: <i>file://localhost/home/operation/doc/file.doc</i> and you want the display URL to appear as: <i>https://webhost/client/doc/file.doc</i> then specify the File URL Prefix as: <i>file://localhost/home/operation</i> and the Display URL Prefix as: <i>https://webhost/client</i> If you select Display URL Prefix, make sure that the files are reachable using the specified URL. The search engine crawler replaces the URL string specified for the File URL Prefix with the Display URL Prefix. Note: When you select Display URL Prefix, you must consider the following: A File URL Prefix must be a fully resolved path; it should not be a symbolic link.

Specifying Document Types

Access the Document Types page by selecting **PeopleTools**, and then **Search Framework**, and then **Search Designer Activity Guide**, and then **Search Definition** and selecting a Source Type of *File Source*. Then click the Document Types tab.

Use the Document Types page to specify the document types, expressed as MIME types, of the documents to be crawled.

This example illustrates the fields and controls on the File Source: Document Types page. You can find definitions for the fields and controls later on this page.

General Document Types

Document Types

Search Definition QE_FILE_PIASRCH

Description File type for piasrch testing

Document types to crawl

☐ Include default types
 ☐ Include all types
 ☐ Add document types
 ☒ Exclude document types

Select
Personalize | Find | |
First 1-2 of 2 Last

	Document Type		
1	text/plain		
2	application/msword		

URL Boundary Rules

Inclusion Rules

Exclusion Rules

Document Types to Crawl

Field or Control	Description
Include default types	Crawl only on the default document types, as defined by the search engine. The search engine default document types for crawling are: • PDF • HTML • TXT (plain text) • Microsoft Word • Microsoft Excel • Microsoft PowerPoint If no other document types are added to the Select grid, then the search engine considers only the default document types.
Include all types	Crawl all document types supported by the search engine. To see this list of supported document types, expressed as MIME types, select either the Add these types or Exclude these types radio button and click the lookup button for the Document Type column.

Field or Control	Description
Add document types	In addition to the default document types, the system also crawls any document type added to the Document Type grid, with Add document types selected.
Exclude document types	Excludes specific document types added to the Document Type grid. Assume the majority of the document types supported by the search engine crawler apply to your configuration, except for a small number of document types. In this case you can specifically include those document types in the Document Type grid. When the search engine crawls the file location, the search engine crawls all document types on the supported MIME list, except for those document types included in the Document Type grid, with Exclude document types selected.

URL Boundary Rules

Field or Control	Description
Inclusion Rules	Specify an inclusion rule that a URL must contain. For example: <i>*ss_xml*</i> In this case, search engine crawls all documents with <i>ss_xml</i> in the name. Specify an inclusion rule that URL must start with. For example: <i>file://localhost/ds1/product/SS_ADD/ss_doc*</i> In this case, the search engine crawls all files starting with <i>file://localhost/ds1/product/SS_ADD/ss_doc</i> .
Exclusion Rules	Specify an exclusion rule that a URL can't contain. For example: <i>*.xml</i> In this case, the search engine does not crawl anything with a <i>.xml</i> extension.

URL boundary rules limit the crawling scope. When you add boundary rules, the crawler is restricted to URLs that match only the rules you specify. Inclusion and Exclusion rules can be formed to filter documents with patterns of *begins with*, *ends with*, *contains* or regular expressions. Rules with regular expression should start with the character *R*.

Rule	Description
Begins With: <i>file://localhost/example*</i>	In this case, the search engine considers URLs starting with <i>file://localhost/example</i> .
Ends With: <i>*.doc</i>	In this case, the search engine considers URLs ending with <i>.doc</i> .
Contains: <i>*contacts*</i>	In this case, the search engine considers URLs containing string <i>contacts</i> .

Rule	Description
Regular Expression: <i>R.*ss_html_lvl[1-9].html</i>	In this case, the search engine considers URLs ending with numbers varying from 1 to 9 with file names ending with <i>ss_html_lvl</i> .

When working with these rules, keep in mind:

- Exclusion rules always override inclusion rules.
- Multiple inclusion and exclusion rules can be separated by a space or in a new line.
- Use an asterisk to represent a wildcard.
- Inclusion and exclusion rules are case-insensitive.

7

Creating Web Source Search Definitions

Understanding Web Source Search Definitions

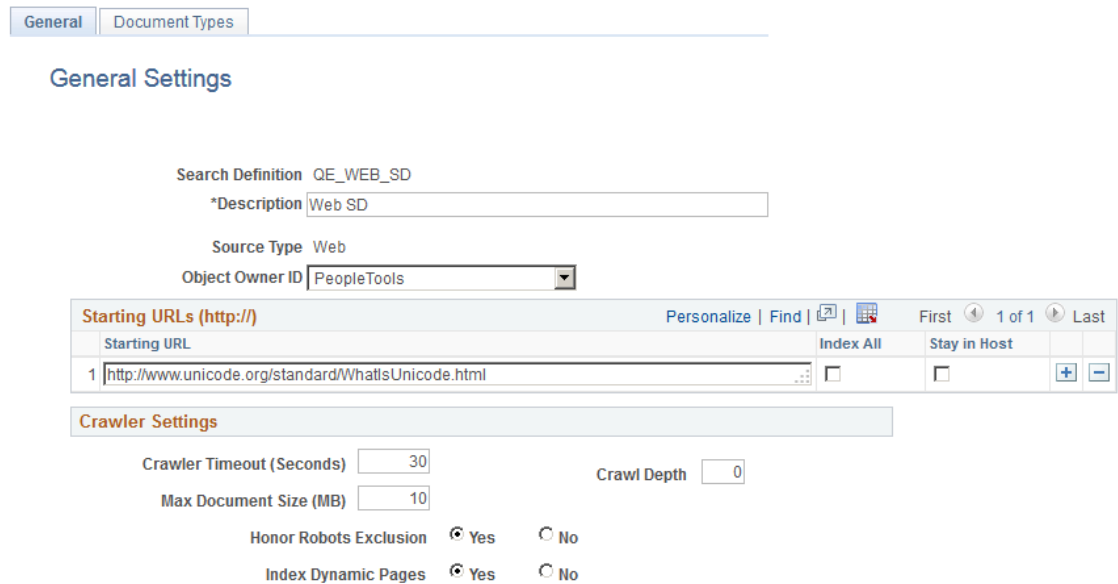
Web source definitions enable you to make the content of internal or external websites available for search engine crawling and inclusion in the Search Framework end user searches. For example, if there is a website on your company's intranet that describes specific business processes for your end users, they can instigate a search against this web content from within the PeopleSoft application.

Specifying Web Source General Settings

Access the General Settings page by selecting **PeopleTools**, and then **Search Framework**, and then **Search Designer Activity Guide**, and then **Search Definition** and selecting a Source Type of *Web Source*.

Use the General Settings page to specify the location of the files to be indexed as well as the crawler settings.

This example illustrates the fields and controls on the Web Source — General Settings page. You can find definitions for the fields and controls later on this page.



General | Document Types

General Settings

Search Definition QE_WEB_SD
*Description Web SD
Source Type Web
Object Owner ID PeopleTools

Starting URLs (http://)		Personalize	Find	First	1 of 1	Last
Starting URL	Index All	Stay in Host				
1 http://www.unicode.org/standard/WhatsUnicode.html	☐	☐				

Crawler Settings

Crawler Timeout (Seconds) 30
Max Document Size (MB) 10
Crawl Depth 0
Honor Robots Exclusion ☒ Yes ☐ No
Index Dynamic Pages ☒ Yes ☐ No

Field or Control	Description
Description	Add a brief description to help identify the purpose of the search definition.

Field or Control	Description
Source Type	Displays the type of search definition, such as Query, Web, File, and so on.
Starting URLs	Contains the URL of the web address. The search engine uses the URL as an entry point for starting to crawl a website. Important: Only HTTP URLs are supported. The starting URL's mentioned should be accessible without any user credentials. The search engine crawler will ignore web sites requiring login.
Index All	This will index all the URLs which are allowed to access by the search engine crawler. This will not limit crawling in to a specific domain or host. As the number of URLs to index increases, time required to complete indexing also increases.
Stay in Host	This will limit the indexing only to the specified host. For example, if you are indexing www.oracle.com and you select this option, you can index documents on www.oracle.com, but not on www.1.oracle.com. Important: If neither option is selected, then the system switches to <i>Stay in Domain</i> mode. In this mode, indexing will be limited to a single domain. For example if you are indexing www.oracle.com it will consider all URLs with in this domain, including www.1.oracle.com, but URLs from a different domain, such as www.yahoo.com, would not be indexed.
Crawler Timeout	Indicates the maximum allowed time to retrieve a file for crawling.
Crawl Depth	The number of nested links the crawler follows, with the initial URL, or home page, residing at a <i>depth of 0</i>. With a crawling depth of 1, the crawler also fetches any document linked to from the starting URL. With the crawling depth set to 2, the crawler fetches any document linked to from the starting URL (depth of 0), and also fetches any document linked to from the depth of 1, and so on. By adding a value for Crawl Depth, the system uses that value to enforce the crawling limit. If you enter no value, leaving the Crawl Depth blank, the system considers the crawling depth to be unlimited. As you increase the crawl depth, the content to be indexed can increase exponentially, which results in longer crawling durations.
Max Document Size	The maximum document size in megabytes that the system will crawl. Larger documents are not crawled.

Field or Control	Description
Honor Robots Exclusion	Robot exclusion policies are set at web server and the web page level. The Honor Robots Exclusion setting controls whether the search engine recognizes or ignores the robot exclusion settings. • <i>Yes.</i> The crawler traverses the pages based on the access policy specified in the web server robots.txt file. The crawler also respects the page-level robot exclusion specified in HTML meta tags. • <i>No.</i> The crawler ignores any specified robot policy defined on the web server.
Index Dynamic Pages	Controls whether search engine crawls and indexes dynamic pages. Typically, database applications serve dynamic pages, and the pages have a URL containing a question mark (?). The search engine considers URLs containing question marks dynamic pages. • <i>Yes.</i> The search engine crawls dynamic pages. • <i>No.</i> The search engine does not crawl dynamic pages.

Specifying Document Types for Web Source

Access the Document Types page by selecting **PeopleTools**, and then **Search Framework**, and then **Search Designer Activity Guide**, and then **Search Definition** and selecting a Source Type of *Web Source*. Then click the Document Types tab.

Use the Document Types page to specify the document types of the documents to be crawled. Document types are expressed as MIME types.

This example illustrates the fields and controls on the Web Source — Document Types page. You can find definitions for the fields and controls later on this page.

General

Document Types

Document Types

Search Definition

QE_WEB_SD

Description

Web SD

Document types to crawl

☐ Include default types

☒ Include all types

☐ Add document types

☐ Exclude document types

Select

Personalize | Find |  

First  1 of 1  Last

Document Type		
1		

URL Boundary Rules

Inclusion Rules

Exclusion Rules

*.js

Document Types to Crawl

Field or Control	Description
Include default types	Crawl only on the default document types, as defined by the search engine. The search engine default document types for crawling are: • PDF • HTML • TXT (plain text) • Microsoft Word • Microsoft Excel • Microsoft PowerPoint Note: When you select this option, notice that you cannot add or remove items from the Document Type grid. Note: Exclusion rules take precedence. For example, if you enter *.doc in the Exclusion Rules edit box, none of the Microsoft Word documents will be processed.

Field or Control	Description
Include all types	Crawl all document types supported by the search engine. To see this list of supported document types, expressed as MIME types, select either the Add these types or Exclude these types radio button and click the lookup button for the Document Type column. Note: When you select this option, notice that you cannot add or remove items from the Document Type grid.
Add document types	In addition to the mandatory document types, which are HTML and TXT files, the system also crawls any document type added to the Document Type grid.
Exclude document types	Excludes specific document types added to the Document Type grid. Assume the majority of the document types supported by the search engine crawler apply to your configuration, except for a small number of document types. In this case you can specifically include those document types in the Document Type grid. When the search engine crawls the file location, the search engine crawls all document types on the supported MIME list, except for those document types included in the Document Type grid.

URL Boundary Rules

Field or Control	Description
Inclusion Rules	Specify an inclusion rule that a URL must contain. For example: <i>www.*example.com</i> In this case, the search engine crawls all content within <i>www.*example.com</i>.
Exclusion Rules	Specify an exclusion rule that a URL can't contain. For example: <i>www.*uk.example.com</i> In this case, the search engine does not crawl anything within <i>www.*uk.example.com</i>.

URL boundary rules limit the crawling scope. When you add boundary rules, the crawler is restricted to URLs that match only the rules you specify. Inclusion and Exclusion rules can be formed to filter documents with patterns of *begins with*, *ends with*, *contains* or regular expressions. Rules with regular expression should start with the character *R*.

Rule	Description
Begins With: <i>http://www.uk.example.com*</i>	In this case, the search engine considers URLs starting with <i>www.uk.example.com</i> .
Ends With: <i>*.xml</i>	In this case, the search engine considers URLs ending with <i>.xml</i> .

Rule	Description
Contains: <i>*contacts*</i>	In this case, the search engine considers URLs containing string <i>contacts</i> .
Regular Expression: <i>R^http://www.example.com/code.*/version[1-9].html\$</i>	In this case, the search engine considers URLs from example.com with sites starting with string <i>code</i> , and has versions numbered from 1 to 9 and ends as <i>.html</i> .

When working with these rules, keep in mind:

- Exclusion rules always override inclusion rules.
- Multiple inclusion and exclusion rules can be separated by a space or in a new line.
- Use an asterisk to represent a wildcard.
- Inclusion and exclusion rules are case-insensitive.

Specifying Proxy Parameters

In OpenSearch, if you want to crawl Web sites outside of your network, you need to specify the proxy parameters in the `opensearch.yml` configuration file.

To specify the proxy parameters:

1. Open the `opensearch.yml` configuration file, which is available at `<OS_HOME>/config`.
2. Locate the Web Crawler section, and enter your network proxy values for the following parameters:
 - `orcl.proxy.host` - Enter the network proxy host.
 - `orcl.proxy.port` - Enter the network proxy port.
3. Save the `opensearch.yml` file.

8

Creating Activity Guide Search Definitions

Understanding Activity Guide Search Definitions

Activity Guide search definition enables you to index the activity guide instances data that can be used for analytics in PeopleSoft Insights. You can also use an application table as the data source in order to provide supplemental information in the index.

Currently, the primary purpose of an activity guide search definition and index is for analytics, that is, these indexes are not designed to be used in global search.

After creating a search definition and indexing it, you can create visualizations in PeopleSoft Insights. For information on creating visualizations and managing visualization and dashboards, see [Understanding Application Data and Insights Dashboards](#).

Specifying Activity Guide General Settings

Use the General Settings page to specify the activity guide and application table (if required) data sources to be indexed for analytics. At this point, you should plan the data you want to build into a visualization, and in accordance with that plan include the required activity guide templates and application tables for the visualization. Adequate planning of a visualization at this stage ensures that you have the required data indexed and available in PeopleSoft Insights at the time of creating a visualization.

Access the General Settings page by selecting **PeopleTools**, and then **Search Framework**, and then **Search Designer Activity Guide** and from the left panel, choose Search Definition.

This example illustrates the fields and controls on the General Settings page. You can find definitions for the fields and controls later on this page.

General Security Advanced

General Settings

Search Definition AG_SD1
*Description AG_SD1
Source Type Activity Guide
*Title PTAL_LABEL
*Last Updated DateTime LAST_UPDATE_DTTM
Object Owner ID

Data Source

Activity Guide Templates

Activity Guide ID	Title		
1 QE_GRDVSQ	QE Grids Testing AG - VSGP Wt Questionnaire	+	-

Application Records

Record (Table) Name	Record Description		
1 QEQPII_EMPLOYEE	QEDMO Employee	+	-

Search Attributes

*Record (Table) Name	*Field Name	Field to Index	Field Label ID	Attribute Display Name	Attribute Name		
1 PTAL_CONTEXT	EMPLID	☐				+	-
2 PTAL_CONTEXT	OPRID	☒	USERID	User ID	OPRID_USERID	+	
3 PTAL_ITEM	PTAL_ACTIVE_FLG	☐				+	-
4 PTAL_ITEM	PTAL_ACTL_DUR	☐				+	-
5 PTAL_ITEM	PTAL_ASSIGN_DT	☐				+	-
6 PTAL_ITEM	PTAL_CNT_NUM	☐				+	-
7 PTAL_ITEM	PTAL_DUE_DATE	☐				+	-
8 PTAL_ITEM	PTAL_END_DTTM	☐				+	-
9 PTAL_ITEM	PTAL_ESTM_DUR	☐				+	-
10 PTAL_ITEM	PTAL_ITEM_ID	☒	PTAL_ITEM_ID	Item ID	PTAL_ITEM_ID	+	
11 PTAL_ITEM	PTAL_LABEL	☒	PTAL_LABEL	Title	PTAL_LABEL	+	
12 PTAL_ITEM	PTAL_REQD	☐				+	-
13 PTAL_ITEM	PTAL_RES_DATE	☐				+	-
14 PTAL_ITEM	PTAL_RES_OPRID	☐				+	-
15 PTAL_ITEM	PTAL_SEQ	☐				+	-
16 PTAL_ITEM	PTAL_START_DT	☐				+	-
17 PTAL_ITEM	PTAL_START_DTTM	☐				+	-
18 PTAL_ITEM	PTAL_STATUS	☐				+	-
19 PTAL_LIST	CREATED_DTTM	☒	CREATED_DTTM	Created Datetime	CREATED_DTTM	+	
20 PTAL_LIST	LAST_UPDATE_DTTM	☐				+	-
21 PTAL_LIST	PTAL_ACTL_DUR	☐				+	-
22 PTAL_LIST	PTAL_DUE_DATE	☐				+	-
23 PTAL_LIST	PTAL_END_DTTM	☐				+	-
24 PTAL_LIST	PTAL_ESTM_DUR	☐				+	-
25 PTAL_LIST	PTAL_LABEL	☐				+	-

Data Source Mapping

Application Record Mapping

Source Record	Source Field	Target Record	Target Field		
1 QEQPII_EMPLOYEE	EMPLID	PTAL_CONTEXT	OPRID	+	-

Effective Dated Processing

Source Record	*Processing Type	Constant Date
1 QEQPII_EMPLOYEE	Current Effective Dt	

Field or Control	Description
Search Definition	Displays the search definition's name as specified when adding a new value.
Description	Provide any additional information to distinguish the search definition.
Source Type	Displays the source type as specified when adding a new value.
Title	Currently, the default title is PTAI_LABEL, which is the label of a step. The same label is used in the summary text, so the title and summary text is the same.
Last Updated Date Time	The last updated date and time information is from the item table. However, If any updates are made on the list table fields that are selected in the search attributes grid, the updated date and time from the list table is propagated to a new field (PTSF_LAST_UPDDTTM) in the item table. This field is used for both incremental indexing and real-time indexing updates on the list table.

Data Source

In addition to the activity guide templates, you can choose an application table to provide supplemental information. To help the indexing process fetch appropriate row or rows of data from application table, additional configuration is needed to map application table key fields with activity guide context table fields, which is specified in the Data Source Mapping grid. The mapping is used by the indexing process to fetch appropriate rows of data from application table and include it as part of the search document.

Field or Control	Description
Activity Guide ID	Select the activity guide template whose instance data needs to be indexed. When you select an activity guide template, the Search Attributes grid is populated with its distinct context data fields and instance property fields, which can be selected for indexing. You may include multiple templates if the guided process contains more than one template. Ensure that you include functionally relevant templates when grouping multiple templates for a search definition.

Field or Control	Description
Record (Table) Name	Search Framework enables you to include an application table in the search definition to provide supplemental information that is not part of activity guide core tables. Therefore, if you specify an application table without specifying an activity guide template, it would result in an invalid search definition. Only application tables with key values are listed in order to facilitate correct data source mapping. Select the required application table. When you select an application table, the Search Attributes grid is populated with its fields, so you can choose the fields to be indexed.

Search Attributes

The grid is populated with fields based on the data sources in the Data Source grid.

Use the grid to add, select, or remove fields for new or existing Activity Guide Search Definitions.

Note

To edit the search attributes, the Search Definition must be undeployed. After deployment, the Search Attributes grid is frozen to preserve the deployed Search Definition structure.

When you add a row in the grid, use the Record (Table) Name to select the record that contains the field to be indexed. The lookup page displays the tools and application records available for the Search Definition.

Look Up Record (Table) Name

Search by: Record (Table) Name begins with

Search

Cancel

Advanced Lookup

Search Results

View 100

<

<

1-4 of 4

>

>

Record (Table) Name	Description
PTAI_CONTEXT	AG Record
PTAI_ITEM	AG Record
PTAI_LIST	AG Record
QEQPII_EMPLOYEE	AG Record

Field or Control**Description****Record (Table) Name**

Select the record that contains the field to be indexed. The lookup page displays the records available for the Activity Guide Search Definition, including activity guide tools records and configured application records.

Field Name

Select the field to be indexed from the selected record.

Field to Index

Select the fields that you want to be indexed by the search engine. These fields would be those that you intend to include in analytics. Fields that you do not select are not indexed.

Fields that are considered necessary for any activity guide based visualization are selected, by default and cannot be edited. Oracle recommends that you do not change these mandatory fields.

The remaining columns in the grid become enabled only after selecting the Field to Index check box for a particular row.

Field Label ID

This field is auto populated, however you can choose another field label in order to maintain an unique value in the Attribute Name field.

If you select a field that is not the default field label, the Attribute Name will change to reflect your choice.

Field or Control	Description
Attribute Display Name	Determines how the attribute will display when creating a visualization. Note: The attribute display name must be unique in a search definition. Note: The display name comes from the field labels associated with the Field Name. It cannot be entered manually. If the wording of the display name is not appropriate, you need to add a new field label. On Save, a validation is built into the system to check whether duplicate attribute display names exist in the search definition. If you, a message prompts you to choose a different attribute display name.
Attribute Name	Displays the pre-defined attribute name that identifies the field in the search engine. Note: The attribute name must be unique in a search definition. An Attribute Name is formed by concatenating the field name with its field label, unless the label is the default. If the field label is the default, just the field name is used for the attribute name. For example, if the field is VENDOR and the Display Name chosen is the default, then the attribute name is VENDOR. If the Display Name chosen is SUPP1 and it is not the default, then the attribute name is VENDOR_SUPP1. Due to this, there might be conflict between two fields which end up having same attribute name, and in these cases it is recommended to create a new label to make the attribute unique.

Data Source Mapping

The Data Source Mapping grid appears only when you specify an application table as a data source.

Use the Data Source Mapping grid to map application table key fields with activity guide context table fields.

All the application table key fields should be mapped to corresponding fields from PTAI_CONTEXT table. That is, all the application table key fields should be part of context fields of an activity guide template, which ensures fetching of correct rows of data to be included in the index. If an application table contains effective date, sequence or status fields (EFFDT, EFF_SEQ and EFF_STATUS fields) as one of the key fields, Search Framework ensures filtering of appropriate rows, applying the effective dated processing logic for the respective application table, during indexing (full, incremental, and real time).

Note

The Effective Dated Processing grid appears only when you specify an application table which has an effective dated field.

Field or Control	Description
Source Record	Select the required application table.
Source Field	Select the required key field.
Target Record	Select the required activity guide context table.
Target Field	Select the required field from the activity guide context table.
Processing Type	Select the processing type for the application table. Options include: - Constant Date - Current Effective Dt - Instance Creation Dt
Constant Date	Select a date for the Constant Date process type. Note: This field is activated only when Constant Date is selected as the Processing Type .

Specifying Security Settings

Access the Security Settings page by selecting **PeopleTools**, and then **Search Framework**, and then **Search Designer Activity Guide** and from the left panel choosing Search Definition. Select the Security tab.

This example illustrates the fields and controls on the Security Settings page. You can find definitions for the fields and controls later on this page.

General
Security
Advanced

Security Settings

Search Definition: ONBOARDING
Description: onboarding

Security Option
☒ No Security
☐ Source Level Security
☐ Document Level Security

The Security page enables you to restrict access to data generated by a search definition. Depending on the sensitivity of the data, you can set these degrees of security:

Field or Control	Description
No Security	Select to define no security restriction for a search definition's data. Anyone with access to the application can view the data for a search definition set to No Security. That is, the data is public to all users.
Source Level Security	Select to allow or restrict access to the entire search definition as per the specified user or role. That is, only specified users and roles are able to view data generated by that search definition.
Document Level Security	Select to restrict access to specific data generated by a search definition. That is, with document level security, users can view data generated by that search definition to which they have access. Note: This is generally referred to as row-level security in PeopleSoft applications.

Setting Source Level Security

Access the source-level security settings by selecting the Source Level Security radio button.

This example illustrates the fields and controls on the Security Settings page - Source Level Security option. You can find definitions for the fields and controls later on this page.

General
Security
Advanced

Security Settings

Search Definition: ONBOARDING
Description: onboarding

Security Option

☐ No Security
☒ Source Level Security
☐ Document Level Security

Source Level

User/Role Mapping

1-1 of 1

	Type	Name	Privilege		
1	Role		Allow	+	-

Field or Control	Description
Type	Select Role or User depending on the scope of your intended access restriction. • Selecting Role restricts access to a specific PeopleSoft role. • Selecting User restricts access to a specific PeopleSoft user.
Name	Select the user or role name.
Privilege	Define the access privilege or restriction. • Allow - The specified role or user is allowed to view data for this search definition. • Deny - The specified role or user is not allowed to view data for this search definition.

 Note

Source-level security applies to every document within that search definition.

Setting Document Level Security

Access the document-level security settings by selecting the Document Level Security radio button. Document-level security can also be thought of as attribute-based security.

This example illustrates the fields and controls on the Security Settings page - Document Level Security option. You can find definitions for the fields and controls later on this page.

General

Security

Advanced

Security Settings

Search Definition ONBOARDING
Description onboarding

Security Option

☐ No Security ☐ Source Level Security ☒ Document Level Security

Document Level**Field Mapping**

Q		1-1 of 1			
Record	Field Name	Attribute Name	Privilege		
1			Allow	+	-

Document Filter App Class

Package Name:

Path:

Class ID:

Field or Control**Description****Record**

Select the name of the record (table) containing the fields you want to use to restrict access.

Field Name

Select the field that will identify security values and determine access.

The selected field becomes the security attribute having the specified privilege. At indexing time, when the crawler inserts application data into the index, the values populating the selected field will carry the specified privilege.

Privilege

Define the access privilege or restriction.

- Allow - The value specified in the Field Name field is allowed access to the data.
- Deny - The value specified in the Field Name field cannot see the data.

Note: The privilege of Deny is useful in situations where there are too many values for the security attribute if Allow were selected. For example, rather than enabling access to nine out of ten field values, it is more efficient to deny access only to the one you want to restrict.

Note: If multiple attributes appear in the grid the system effectively inserts an AND clause between the items in the grid.

Field or Control	Description
Package Name	The application class enables you to define and run additional filters and logic against the application data contained in the indexed source fields. The application class needs to be implemented to return the list of allowable values for the configured security attributes in the Field Mapping grid. Select the appropriate application package.
Path	Select the path pointing to the application class.
Class ID	Select the appropriate application class.

Specifying Advanced Properties

Access the Advanced Properties page by selecting **PeopleTools**, and then **Search Framework**, and then **Search Designer Activity Guide** and from the left panel choosing Search Definition. Select the Advanced tab.

This example illustrates the fields and controls on the Advanced Properties page. You can find definitions for the fields and controls later on this page.

Advanced Properties

Search Definition AG_SD1

☒ Real Time Indexing Available

Description	AG_SD1
-------------	--------

Pre Processing AE Library

AE Library

AE Section

Full Indexing Criteria

Index Only Last Days

Index Start Date 01/01/1900

Indexing Criteria

Application Class

Package Name AGFILTER

Path :

Class Name	AGSqlFilter	🔍
------------	-------------	---

	Record (Table) Name	SQL text		
1	PTAI_CONTEXT	SQL Text	+	-
2	PTAI_ITEM	SQL Text	+	-
3	PTAI_LIST	SQL Text	+	-

Field or Control	Description
Search Definition	Displays the search definition's name as specified when adding a new value.

Field or Control	Description
Real Time Indexing Available	Indicates whether the search definition is enabled for real-time indexing or not. If this check box is disabled, the search definition is not available for real-time indexing. For the list of search definitions excluded from real-time indexing, see Excluding Search Definitions from Real-Time Indexing .

Pre Processing AE Library

Before an index build is run, data can be manipulated to perform additional tasks. For example, it may be required to search through subqueries to determine if one or more subquery might have changed and to update the last updated datetime value on the parent so that the change is recognized. Another use might be to calculate or summarize a value to be indexed. Another common case for pre processing occurs when a query is created based on staging tables. In this case the pre processing Application Engine program can be used to populate the staging tables. This is useful when the data cannot be retrieved using a simple query (such as hierarchical or computed data).

You can define an Application Engine routine to perform these tasks.

Note

Pre processing adds to the overall indexing time, and it is recommended not to use this in scenarios where it can be avoided.

Note

Application Engine programs used for pre processing should be defined as type Library.

Field or Control	Description
AE Library	To call additional processing logic from Application Engine, specify the correct AE Library (Application Engine program) to run.
AE Section	Specify the Application Engine program section to run.

Full Indexing Criteria

Field or Control	Description
Index Only Last <> Days	Enter the number of days for which you want to build the index. The number of days entered are treated as days prior to the current date. The default value is 0.

Field or Control	Description
Index Start Date	The Index Start Date is calculated based on the number of days you enter in the Index Only Last <> Days field. The Index Start Date displays the date after deducting the number of days entered in the Index Only Last <> Days fields from the current date. The index will be built from the date that is displayed in the Index Start Date field. When the value of the Index Only Last <> Days field is 0, which is the default value, the Index Start Date is set to 01/01/1900.

Indexing Criteria

Use the Indexing Criteria section to define filtering criteria for an Activity Guide Search Definition. The criteria restrict the rows included during indexing. When criteria are configured, the indexing process appends the SQL condition text returned by the configured application class to the generated indexing SQL for the corresponding record by adding an AND condition. Only rows that satisfy the resulting SQL are indexed

Note

The system uses the SQL condition text returned by the application class. Ensure that the condition is valid for the selected record, and use Meta-SQL for database-specific expressions when the Search Definition must run across multiple database platforms. Before running indexing, review the original indexing SQL generated for each record by enabling Process Scheduler SQL trace to reduce the risk of runtime errors.

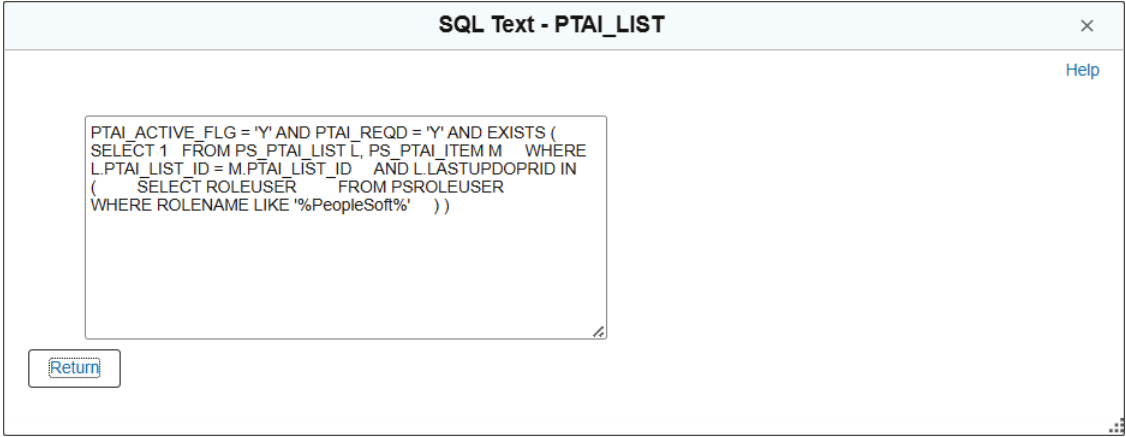
Field or Control	Description
Indexing Criteria	Enables filtering for Activity Guide Search Definition indexing. Use this section to specify the application class that returns SQL condition text and to identify the records for which criteria are applied.
Application Class	Identifies the application class that provides SQL condition text for the selected records. For more information, see PeopleCode API Reference: <code>getAGFilterSQLText</code> .
Package Name	Specify the application package that contains the application class used to return the SQL condition text.
Path	Specify the application class path.
Class Name	Specify the application class name.

Field or Control	Description
Record (Table) Name	Specify the Tools Activity Guide record for which the indexing filter applies. SQL filter criteria are not supported for application records. The system passes the selected record names to the configured application class. Note Application records are not supported for SQL filter criteria because, if the SQL condition is applied to an application record and the data does not satisfy that condition, no rows are returned for that record. As a result, the related data is not displayed on the dashboard, which can cause confusion.
SQL text	Click to view the SQL condition text returned by the configured application class for the selected record. For more information, see the Viewing SQL Text section later in this topic.

Viewing SQL Text

After you specify the application class and add records in the Indexing Criteria grid, click the SQL text link for a record to view the SQL condition text returned by the configured application class. The SQL text is displayed in view-only mode. During indexing, the system appends this condition to the generated indexing SQL for that record.

This example illustrates the SQL text returned for the record.



9

Creating Search Categories

Understanding Search Categories

Search categories are essential for Search Framework. Search categories:

- Organize search definitions into manageable, logical groups of data.
- Are required for searches. Search queries run only against search categories, not search definitions. A search definition must be a member of a search category before it can be searched.
- Enable users to focus searches to help refine results and restrict searches to a particular set of search indexes. For example, users can run searches against categories like Customers, Purchase Orders, or Products, rather than running a search against all indexes in the search engine.
- Allow users to search across several different groups of data simultaneously. For example if you were looking for a particular Item ID, with a Search category containing multiple Search Definitions, you can search across purchase order, sales orders and inventory at one time.
- Provide improved search performance and results by limiting the number of indexes searched.

Note

Search queries cannot be run directly against search definitions. Search queries can only be run against search categories.

Specifying General Search Category Settings

Access the General page by selecting **PeopleTools**, and then **Search Framework**, and then **Search Designer Activity Guide**, and then **Search Category**.

This example illustrates the fields and controls on the General page. You can find definitions for the fields and controls later on this page.

General

Advanced Search Fields

Facets

Custom Search Page

Display Fields

General Settings

Search Category Name

PTPORTALREGISTRY

*Description

Navigator

Duplicates

Use API

☒ Search Group

Object Owner ID

PeopleTools

Personalize | Find | |

First ◀ 1 of 1 ▶ Last

* Search Definition	Description		
PTPORTALREGISTRY	Navigator		

Field or Control	Description
Search Category Name	Displays the search category name. Important: Though any number of search definitions can be mapped to a search category, for each and every search definition, a search category of the <i>same</i> name must exist, and the search definition must belong to that search category. You can create search categories of a different name that are not associated with a single search definition. A search definition may belong to more than one search category, but it <i>must</i> belong to one with the same name. For example, search definition XYZ must belong to search category XYZ, but search definition XYZ can also belong to search category ABC. Search category ABC does <i>not</i> require a corresponding search definition of the same name, and it can contain multiple search definitions. Search categories with more than one search definition need to be manually deployed.
Description	Add any additional information to distinguish search categories. Note: If this search category becomes exposed through Global Search, then the description you enter may appear in the Global Search Bar. The description must be appropriate for end user viewing. Make the description as informative, concise, and intuitive as possible. Note: The description is translatable.
Duplicates	Note: This option is not implemented with OpenSearch. It is retained for backward compatibility.
Search Group	Select to enable this search category to be available for context searching within Global Search.

Field or Control	Description
Search Definition	Add all search definitions that belong to this search category.
Save As	Click to clone the search category. In the subsequent page, you need to enter a name for the cloned search category. When you clone a search category, all the meta-data associated with the existing search category is saved in the cloned search category. Note: The Save As button is not available when you create or define a new search category.

Selecting Advanced Search Field Settings

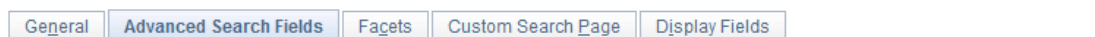
Access the Advanced Search Fields page by selecting **PeopleTools**, and then **Search Framework**, and then **Search Designer**, and then **Search Category** and selecting the Advanced Search Fields tab.

The Advanced Search Fields page enables you to view and modify attributes to show on the advanced search page during end user searches to add more criteria to the basic search mode.

When working with the advanced search page attributes, keep these items in mind:

- This configured list can be programmatically retrieved from the SearchCategory App Class in the PT_SEARCH Application Package using method GetConfiguredFilterAttributes.
- All the attributes associated with this category can be retrieved using the same App Class with the method GetAllAttributes.
- Attributes not appearing on the Advanced Search Fields page can be retrieved using GetNonConfiguredFilterAttributes. This method will provide a list of attributes defined in the related search definitions which have not been configured here.

This example illustrates the fields and controls on the Advanced Search Fields page. You can find definitions for the fields and controls later on this page.



Advanced Search Fields

Search Category Name PTPORTALREGISTRY

Description Navigator

☐ Auto detect common fields

Advanced Search Fields		Personalize Find	First	1-4 of 4	Last
Sequence	*Search Attribute	Description			
1	PORTAL_LABEL	Portal Label			
2	DESCR254	Long Description			
3	PORTAL_PRNTLABEL_PORTAL_FL	Folder			
4	PORTAL_SOURCE	Source Application			

Field or Control	Description
Auto detect common fields	When selected, this flag will gather all fields which are common to all search definitions listed on the General page. This will allow for searching across all search definitions in the category. Select to avoid manually listing the common fields from the joined records. (default) Deselect to delete some or to add additional attributes which are not common to all search definitions. Note: When you select the Auto Detect flag, you must save the search category before the common fields will be properly displayed in the grid.
Sequence	Control the sequence in which the search attributes appear in the advanced search interface.

Selecting Facet Settings

Access the Facets page by selecting **PeopleTools**, and then **Search Framework**, and then **Search Designer Activity Guide**, and then **Search Category** and selecting the Facets tab.

This example illustrates the fields and controls on the Facets page. You can find definitions for the fields and controls later on this page.

General | Advanced Search Fields | **Facets** | Custom Search Page | Display Fields

Facets

Search Category Name PTPORTALREGISTRY

Description Navigator

☒ Auto detect facets

Facets					Personalize	Find	View All	First	1 of 1	Last
Sequence	Facet Name	Description	Is Associated	Facet Association	Advanced Settings					
1	PORTAL_PRNTLABEL_PORTAL_FLDR	Folder	☐		Advanced Settings					

Field or Control	Description
Auto detect facets	Select to detect common facets for all the search definitions belonging to the search category. When you save the search category, any facets that are common to all search definitions are displayed. This saves you from needing to discover which facets can be used to filter across all search definitions. Deselect this option if you wish to remove some facets or add ones that are not common to all search definitions (not recommended as this may distort facet counts).

Field or Control	Description
Sequence	Control the sequence in which the faceted fields display for narrowing search results in an intuitive fashion for users. For example, perhaps you might want to ensure that these faceted fields display in this order: Country, State, County, City.
Description	Displays the value of the Attribute Display Name column in the grid on the Map Search Attributes page for the search definition.
Is Associated	Select if you intend to create a user-specific association with the facet. Note: Creating associated facets applies only to certain situations and expects additional requirements to be in place. For more information, refer to the topic below, “Creating Associated Facets.”
Facet Association	Select how the value to which the facet should be associated will be determined. Options are: • <i>Application Class:</i> When selected, the Associated Value App Class group box appears below the Facets grid on the Facets page, enabling you to specify the application package that will determine the facet association. • <i>Employee ID:</i> Associates the facet value with the employee ID value (%EmployeeID). • <i>User ID:</i> Associates the facet value with the currently signed on user (%UserID).

Field or Control	Description
Advanced Settings	Select to add further sorting and categorization of the facets depending on the data type of the facet. For example, you can create sort orders for string facets and ranges for number and date facets. See the following topics for more details on the options for each facet data type. By default, facet values are sorted by count, meaning that the system displays the facet value containing the most search results first, or at the top of the list. While this may be desirable in many situations, in some situations it may provide a better user experience if the facets are sorted based on criteria other than just the number of search results. For example, if the facet is a date field, it may make more sense to sort the facet values by the actual year, in a sequential order, (2013, 2012, 2011, and so on) as opposed to the number of search results with in each year. Likewise, in another situation, it may be more intuitive to sort a faceted Customer field alphabetically, regardless of search result count. Important: Setting facet ranges applies only to date and number data types. Values with data types of datetime cannot be used as facets. See Defining Advanced Settings for String Facets. See Defining Advanced Settings for Number Facets. See Defining Advanced Settings for Date Facets.

Keep in mind that this configured list of facets can be programmatically retrieved using the GetFacetFilters method in the SearchCategory App Class in the PT_SEARCH Application Package. The result, which is an array of PT_SEARCH:FacetFilter, can be passed to the PT_SEARCH:SearchQuery class to get facet nodes in the search results.

Creating Associated Facets

An associated facet is a facet that is associated with a specific field value, such as an employee ID or the current user ID. This enables that associated facet value to be filtered automatically by the facet association value. These facets appear in the facet pane within a separate facet node entitled "My Association" for example (default). All other facets in the facet pane behave normally, and the My Association facet node appears only if search results associated to the current user exist for the current search request.

For example, consider users accessing a component where job postings are created and managed. A hiring manager may want to have a facet category containing only search results associated with her, which might contain only those job postings she created. Likewise, a recruiter may want to have a facet category containing results associated only with him, such as the job openings for which he is the recruiter.

If you intend to implement associated facets for custom search categories, it is recommended that you examine the associated facets in your delivered PeopleSoft application search definitions and search categories to see examples. The following list provides general recommendations:

- You need to ensure that the facet association value is available in your table structure, your query or connected query, and that the value is indexed. Or, you can reference an application class, which will determine the association value programmatically.
- Only hierarchical search attributes can be associated facets. Define a hierarchy-based faceted attribute in the search definition, where the first level acts as the key for the facet association, for example user ID or employee ID, and the second level being the association, such as *A.OPRID/HRS_ASSOCIATION_CD*. It is recommended that at the association level, you reference a translate value (XLAT), such as hiring manager, recruiter, and so on.
- In cases, where the first level of the facet association is not user ID or employee ID, which PeopleTools populates, the PeopleSoft application delivers an application class to determine this value. If you are creating custom search definitions and categories, you will need to create the application class.

Defining Advanced Settings for String Facets

This example illustrates the fields and controls on the Advanced Facet Settings page (for string data types). You can find definitions for the fields and controls later on this page.

The screenshot shows the 'Advanced Facet Settings' dialog box. At the top, it displays 'Facet Name: PORTAL_PRNTLABEL_PORTAL_FLDR' and 'Data Type: String'. There are checkboxes for 'Allow Multi Select' (checked) and 'Expand Tree Facet' (unchecked). Below these are 'Override default settings' (unchecked), 'Minimum Document Count' (0), 'Maximum Facet Children' (0), and 'Disable Facet Count' (unchecked). A 'Sort Order' section includes a table with columns 'Level', 'Sort as', and 'Sort order'. The table has one row with 'Level' 1, 'Sort as' as a dropdown, and 'Sort order' as a dropdown. Navigation buttons like 'Personalize', 'Find', 'View All', 'First', '1 of 1', and 'Last' are present. At the bottom are 'OK' and 'Cancel' buttons.

Field or Control	Description
Allow Multi Select	By default, all facets enable you to choose multiple facet values on the Global Search results page and the component search results page to filter and narrow down the search results. Select the Allow Multi Select check box to enable multiple facet-values selection in hierarchical facets. If you deselect this option, single select applies to the current facet. Note: Selecting multiple facet values is supported only on fluid search pages; not on classic or classic plus search pages. See Working with Search Results in Global Search.

Field or Control	Description
Expand Tree Facet	The Search Options page contains the Expand Tree Facet option to specify the setting at the system level. The default value is collapsed, that is, the Expand Tree Facet check box is not selected. Select the Expand Tree Facet option if you want the tree facets to be expanded. If you select this option, you are overriding the setting specified on the Search Options page, and the override setting applies to the current facet only. You can use this option to override the setting specified on the Search Options page. See Managing General Search Options.
Override default settings	Select to override the values entered on the Search Options page (PeopleTools, and then Search Framework, and then Search Admin Activity Guide, and then Administration, and then Search Options). When selected the disabled settings on the page become enabled so that you can override the equivalent values entered on the Search Options page. The override values apply to the current facet only. If not selected, the values entered on the Search Options page apply.
Minimum Document Count	Set the minimum number of search results (documents) required to display a facet. Default is 1.
Maximum Facet Children	Set the maximum number of children to be returned for each facet node. Default is 100. Options to enter are: • An integer greater than 0 to limit the number of children displayed. • 0 to indicate no children should be displayed. • -1 to return all children (no limit).
Disable Facet Count	Enables controlling the display of the result count (document count) for each facet node. For example, if 15 search results met a facet node's criteria, (15) appears next to the facet label. Enter Y for Yes or N for No.
Level	In the case of a nested facet, you can add additional rows to the sort order grid, and set different sort options at each level. The Level column indicates the level to which the sort options apply (1, 2, 3, and so on). For multi-select facets, level 1 sort option is used for all levels.

Field or Control	Description
Sort as	Select one of these options to specify how the facet should be treated: <i>Count.</i> While the default sort order is to sort facet values by search result count in a descending order, the Count option enables you to apply an ascending order, for example. <i>Number.</i> Apply the number data type to the facet value. <i>String.</i> Apply the string, or character, data type to the facet value.
Sort order	Specify the sort order that best suits your selected Sort as option and how users expect to see the values displayed, ascending or descending.

Defining Advanced Settings for Number Facets

When the search attribute is a number data type, the Advanced Facet Settings page enables you to configure the sort order and ranges.

This example illustrates the fields and controls on the Advanced Facet Settings page (for date data types). You can find definitions for the fields and controls later on this page.

Advanced Facet Settings

Facet Name

QE_JOB_OPENING_ID

Data Type

Number

☒ Allow Multi Select
☐ Expand Tree Facet

☐ Override default settings

Minimum Document Count

0

☐ Disable Facet Count

Maximum Facet Children

0

Sort Order

Personalize | Find | View All | [Grid Icon] | [List Icon]

First | 1 of 1 | Last

Level	Sort as	Sort order
1	Predefined	

Number Range

Sequence	Node Name	Begin Operator	Begin Facet Value	End Operator	End Facet Value	Message Set Number	Message Number
1	Under 500000	Not Applicable		Less Than Equals	500000.00		
2	500000 - 600000	Greater Than	500000.00	Less Than Equals	600000.00		
3	600000 - 700000	Greater Than	600000.00	Less Than Equals	700000.00		
4	Above 900000	Greater Than	900000.00	Not Applicable			
5	Advanced Settings are in effect.	Greater Than	700000.00	Less Than Equals	800000.00	141	64

OK

Cancel

Field or Control	Description
Allow Multi Select	By default, all facets enable you to choose multiple facet values on the Global Search results page and the component search results page to filter and narrow down the search results. Select the Allow Multi Select check box to enable multiple facet-values selection in hierarchical facets. If you deselect this option, single select applies to the current facet. Note: Selecting multiple facet values is supported only on fluid search pages; not on classic or classic plus search pages. See Working with Search Results in Global Search.
Expand Tree Facet	The Search Options page contains the Expand Tree Facet option to specify the setting at the system level. The default value is collapsed, that is, the Expand Tree Facet check box is not selected. You can use this option to override the setting specified on the Search Options page. See Managing General Search Options.
Override default settings	Select to override the values entered on the Search Options page (PeopleTools, and then Search Framework, and then Search Admin Activity Guide, and then Administration, and then Search Options). When selected the disabled settings on the page become enabled so that you can override the equivalent values entered on the Search Options page. The override values apply to the current facet only. If not selected, the values entered on the Search Options page apply.
Minimum Document Count	Set the minimum number of search results (documents) required to display a facet. Default is 1. This property can be overridden by selecting Advanced Settings on the Facets page (PeopleTools, and then Search Framework, and then Search Designer Activity Guide, and then Search Category, Facets, Advanced Settings).
Maximum Facet Children	Set the maximum number of children to be returned for each facet node. Default is 100. Options to enter are: • An integer greater than 0 to limit the number of children displayed. • 0 to indicate no children should be displayed. • -1 to return all children (no limit).

Field or Control	Description
Disable Facet Count	Enables controlling the display of the result count (document count) for each facet node. For example, if 15 search results met a facet node's criteria, (15) appears next to the facet label. Enter <i>Y</i> for Yes or <i>N</i> for No.

Sort Order

Displays an additional option than the string sort order, *Predefined*, which displays the facet node, based on the sequence number in which the ranges are defined.

Number Range

Field or Control	Description
Sequence	Order in which the ranges are defined.
Node Name	Display name of the facet range. This is a display only field. The facet node is derived from the begin and end values specified for the ranges or by using the Message Catalog. Message Catalog has the precedence.
Begin Operator	The first operator for the range sets the beginning of the range. To set the beginning of the range, you have these options to operate against the beginning facet value specified: - Greater Than - Greater Than Equals: greater than or equal to. - Not Applicable: no starting boundary.
Begin Facet Value	Set the beginning value for a facet range.
End Operator	The second operator for the range, sets the end of the range. To set the end of the range, you have these options to operate against the end facet value specified: - Less Than - Less Than Equals: less than or equal to. - Not Applicable: no ending boundary.
End Facet Value	The end value for the facet range.
Message Set Number	Message catalog set number to provide a custom facet node name.
Message Number	Message number to provide a custom facet node name.

Defining Advanced Settings for Date Facets

When the search attribute is a date data type, the Advanced Facet Settings page enables you to configure the sort order and ranges.

This example illustrates the fields and controls on the Advanced Facet Settings page (for date data types). You can find definitions for the fields and controls later on this page.

Advanced Facet Settings

Help

Facet Name: OPEN_DT

Data Type: Date

☒ Allow Multi Select

☐ Expand Tree Facet

☐ Override default settings

Minimum Document Count: 0

☐ Disable Facet Count

Maximum Facet Children: 0

Sort Order

Personalize | Find | View All | | First | 1 of 1 | Last

Level	Sort as	Sort order	
1			

System

☐ Today

☐ Yesterday

☐ This Week

☐ This Month

☐ This Year

☐ Prior Years

☐ Future Dated

☐ Past 7 Days

☐ Past 15 Days

☐ Past 30 Days

☐ Past 50 Days

☐ Past 100 Days

Date Range

Date Range		Range Type	Begin Operator	Begin Date	Begin Range	End Operator	End Date	End Range	Message Set Number	Message Number	

OK

Cancel

Field or Control	Description
Allow Multi Select	By default, all facets enable you to choose multiple facet values on the Global Search results page and the component search results page to filter and narrow down the search results. Select the Allow Multi Select check box to enable multiple facet-values selection in hierarchical facets. If you deselect this option, single select applies to the current facet. Note: Selecting multiple facet values is supported only on fluid search pages; not on classic or classic plus search pages. See Working with Search Results in Global Search.
Expand Tree Facet	The Search Options page contains the Expand Tree Facet option to specify the setting at the system level. The default value is collapsed, that is, the Expand Tree Facet check box is not selected. You can use this option to override the setting specified on the Search Options page. See Managing General Search Options.
Override default settings	Select to override the values entered on the Search Options page (PeopleTools, and then Search Framework, and then Search Admin Activity Guide, and then Administration, and then Search Options). When selected the disabled settings on the page become enabled so that you can override the equivalent values entered on the Search Options page. The override values apply to the current facet only. If not selected, the values entered on the Search Options page apply.

Field or Control	Description
Minimum Document Count	Set the minimum number of search results (documents) required to display a facet. Default is <i>1</i> . This property can be overridden by selecting Advanced Settings on the Facets page (PeopleTools , and then Search Framework , and then Search Designer Activity Guide , and then Search Category , Facets, Advanced Settings).
Maximum Facet Children	Set the maximum number of children to be returned for each facet node. Default is <i>100</i> . Options to enter are: • An integer greater than 0 to limit the number of children displayed. • 0 to indicate no children should be displayed. • -1 to return all children (no limit).
Disable Facet Count	Enables controlling the display of the result count (document count) for each facet node. For example, if 15 search results met a facet node's criteria, (15) appears next to the facet label. Enter Y for Yes or N for No.

Sort Order

Displays an additional option than the string sort order, *Predefined*, which displays the facet node, based on the sequence number in which the ranges are defined.

System

This group box provides predefined set of date facet nodes.

Field or Control	Description
Today	Displays results with a date for the current day only.
Yesterday	Displays results with a date of the previous day only.
This Week	Displays results with a date for the current week only.
This Month	Displays results with a date for the current calendar month only.
This Year	Displays results with a date for the current calendar year only.
Prior Years	Displays results with a date prior to the current year.
Future Dated	Displays results which are applicable beginning with tomorrow onward.
Past N Days	Displays results which are applicable for the past N days (current date - N), where N is a predefined number of days (7, 15, 30, 50, 100).

Date Range

In addition to the predefined system ranges, you can create additional date ranges using the Date Range grid. This allows you to create ranges based on static dates or relative ranges based on the current date.

Field or Control	Description
Sequence	Defines the order in which the facets appear.
Node Name	A read-only field displaying how the facet node will appear to the end user. The value depends on whether the range is fixed or relative. If the range is fixed, then the system derives the facet node from the begin and end values specified for the ranges or by using the message catalog, with the message catalog taking precedence. If the range is relative, then it is required to provide a message catalog entry for the facet node name.
Range Type	Enables you to create ranges on fixed dates or dates relative to today. Options are: • <i>Fixed</i>. Select to define static beginning and end dates. • <i>Relative</i>. Select to enable the Begin Range drop-down list to select dates relative to the current date. Note: Custom facet ranges do not support the facet nodes for rolling dates. For example, you cannot predefine a facet for each quarter on a financial year and have it dynamically update every year.
Begin Operator	The first operator for the range sets the beginning of the range. To set the beginning of the range, you have these options to operate against the beginning facet value specified: • Greater Than • Greater Than Equals: greater than or equal to. • Not Applicable: no starting boundary.
Begin Date	Available only for fixed ranges. Set the beginning date for the facet range.
Begin No	This is the number of days/months/years to be set as the beginning of the facet range as per the selection from the Begin Range drop-down list.
Begin Range	Set the span of the dates to be included in the range (past or future). Select in the form of: • days/months/years before. • days/months/years from now.

Field or Control	Description
End Operator	The second operator for the range, sets the end of the range. To set the end of the range, you have these options to operate against the end facet value specified: • Less Than • Less Than Equals: less than or equal to. • Not Applicable: no ending boundary.
End Date	Available only for fixed ranges. Set the end date for the facet range.
End No	This is the number of days/months/years to be set as the end of the facet range as per the selection from the End Range drop-down list.
End Range	Set the span of the dates to be included in the range (past or future). Select in the form of: • days/months/years before. • days/months/years from now.
Message Set Number	Message catalog set number to provide a custom facet node name.
Message Number	Message number to provide a custom facet node name.

Identifying Custom Search Pages

Oracle provides default search pages to use with most application purposes. If you need to do something more than this, then you must create custom search pages for custom applications or to provide additional search features.

To indicate for the system to use these custom pages when doing a Global Search, then you should specify that search page, as well as any custom search result or advanced search pages.

Note

This functionality is only available for Global Search, not keyword component-level search.

Access the Custom Search Page page by selecting **PeopleTools**, and then **Search Framework**, and then **Search Designer Activity Guide**, and then **Search Category** and selecting the Custom Search Page tab.

This example illustrates the fields and controls on the Custom Search Page. You can find definitions for the fields and controls later on this page.

Custom Search Page Settings

Search Category Name PTPORTALREGISTRY
Description Navigator

Custom search page

Menu Name

Component Name

Market

Global

Search results page

Advanced search page

Field or Control	Description
Menu Name	Select the menu to which the search page belongs.
Component Name	Select the search page's component name.
Market	Select the appropriate market.
Search results page	Select the search results page to use.
Advanced search page	Select the advanced search page to use.

Working With Display Fields

Access the Display Fields page by selecting **PeopleTools**, and then **Search Framework**, and then **Search Designer Activity Guide**, and then **Search Category** and selecting the Display Fields tab.

This example illustrates the fields and controls on the Display Fields page. You can find definitions for the fields and controls later on this page.

Display Fields

Search Category Name PTPORTALREGISTRY
Description Navigator

Display Fields		Personalize Find  		First  1-3 of 3  Last	
Sequence	* Search Attribute	Description			
1	1 PORTAL_LABEL	Portal Label			
2	2 DESCR254	Long Description			
3	3 PORTAL_SOURCE	Source Application			

Field or Control	Description
Sequence	Use the Sequence edit box to specify the order in which the display fields appear.
Search Attribute	Select the search attribute from the drop-down list.

Administering PeopleSoft Search Framework

Understanding PeopleSoft Search Framework Administration

The system administration related to the Search Framework architecture can include tasks involving the search engine, Integration Broker, application server domains, and so on. PeopleTools provides a Search Framework activity guide that enables you to complete the administration tasks from the Search Framework administration activity guide, specifically under the menu, PeopleTools, Search Framework, Search Admin Activity Guide.

Note

If a task on the activity guide is completed in the relevant system, you may ignore the task in the activity guide.

Understanding the Search Admin Activity Guide

This topic provides overview information about the Search Admin Activity Guide.

The Search Admin Activity Guide is a dashboard in the Search Framework where you can deploy search definitions and manage the search definitions on the search engine. The tasks you can perform using the Search Admin Activity Guide include:

- Configuring search engine connectivity
- Deploying search definitions and categories
- Scheduling index creation and maintenance
- Running index build process
- Monitoring index run schedule
- Testing an index

Other page elements that appear on the page are discussed elsewhere in this book.

Setting Up Local Nodes

To set up local nodes, access the Nodes page by selecting **PeopleTools**, and then **Search Framework**, and then **Search Admin Activity Guide**, and then **Configuration**, and then **Setup Local Nodes**.

! Important

Ensure that you define URLs in the Content URI Text and Portal URI Text fields for each local node that is in use.

For information on setting up local nodes, see *Integration Broker Administration: Configuring Nodes* and *Integration Broker Administration: Understanding Managing Integration Gateways*.

Specifying Integration Broker Gateway

To specify Integration Broker gateway, access the Gateways page by selecting **PeopleTools**, and then **Search Framework**, and then **Search Admin Activity Guide**, and then **Configuration**, and then **IB Gateway**.

See *Integration Broker Administration: Administering Integration Gateways* for more information.

Setting Up Target Locations

To set up target location, access the Target Locations page by selecting **PeopleTools**, and then **Search Framework**, and then **Search Admin Activity Guide**, and then **Configuration**, and then **Setup Target Location**.

See *Integration Broker Administration: Using the Target Locations Page to Set Target Locations for Services* for more information.

Working With Search Instances

A search instance in the PeopleSoft Search Framework represents a single instance of the search engine. The search instance(s) created using the PeopleSoft Search Framework define the instances that will be used by the PeopleSoft applications to provide end user search.

The search instance definition specifies connectivity and other administration settings required for:

- running queries against the search server.
- administrative tasks.

Creating Search Instances

To define a search instance, access the Search Instance Properties page by selecting **PeopleTools**, and then **Search Framework**, and then **Search Admin Activity Guide**, and then **Configuration**, and then **Search Instance**.

You can also define a search instance by using the SEARCH_TEMPLATE configuration template in Automated Configuration Manager (ACM). The steps to run the template are described later in this topic, see [Creating a Search Instance in Automated Configuration Manager](#).

This example illustrates the fields and controls on the Search Instance Properties page. You can find definitions for the fields and controls later on this page.

Search Instance Properties

Search Instance

Search Instance PTSF_DEFAULT
Search Provider OpenSearch
[Search Options Config](#)

Search Instance Properties

Q | < > 1 of 1 > | View All

*Host Name

*Port

*SSL Option

*User Name

*Password

*Proxy Name

*Proxy Pwd

[OpenSearch Interact](#)

OpenSearch Dashboards

Host Name

Port

SSL Option

Logstash

Host Name

Logstash Port

*SSL Option

Call Back Properties ⓘ

URL

User Name

*Password

*Confirm Password

[Set Namespace Aliases](#)

Search Instance

To enable connectivity between your PeopleSoft system and the search engine, you need to provide these search instance values.

Field or Control	Description
Search Instance	Enter a name for the search instance. Note: PeopleSoft Search Framework enables you to create multiple search instances for the purpose of fail-over mechanism. See Understanding High Availability Feature in PeopleSoft Search Framework and Implementing Fail-over Mechanism for more information. When you create multiple search instances, you can use the Search Instance Administration page to specify priority for each search instance. See Administering Search Instances .
Search Provider	OpenSearch is the default search provider.
Search Options Config	See Managing General Search Options .

Search Instance Properties

This section contains details for the user name and password used to connect to the search engine. These credentials are part of the authentication mechanism from PeopleSoft to the search engine. During an incoming search request, the search engine matches these credentials with values stored in the configuration file to authenticate the incoming search request.

Note

Use this section to add multiple nodes for an OpenSearch search instance by clicking the scroll bar plus button. Configuring multiple nodes enables you to use the fail-over mechanism when one of the nodes may go down for any reason. In a multi-node OpenSearch cluster, always ensure that the replica value is set to at least 1. For more information, see [Implementing Fail-over Mechanism](#) and [Managing General Search Options](#).

Oracle PeopleSoft recommends setting up an OpenSearch cluster with three nodes on machines that are not on the same physical server.

For information on creating additional OpenSearch nodes, see [Adding a New Node to an Existing Cluster](#).

Field or Control	Description
Host Name	Enter the server name of the host where the search engine is running, including the domain. The host name value can be a DNS name or an IP address. For example: <i>example.com</i>

Field or Control	Description
Port	Enter the port on which the search engine listens for requests. Note: The default port for OpenSearch is 9200. If a load balancer or reverse proxy is used between OpenSearch and PeopleSoft, the OpenSearch port number should be the same across all nodes in the cluster.
SSL Option	Select one of the options for SSL: • Select DISABLE in the following scenarios: – If SSL is not implemented on the search engine. – If http is implemented on both PeopleSoft and search engine. • Select ENABLE in the following scenarios: – If SSL is implemented on both PeopleSoft and the search engine. – If https is implemented on PeopleSoft and SSL is implemented on the search engine. Note: The setup needs to be either all SSL or all non-SSL. A situation in which one component is in SSL and another is in non-SSL is not permissible. See Configuring SSL between PeopleSoft and Search Engine.
Ping	Click to make sure your host name and port are correct and that the search engine is available. A positive result displays a success message. <i>Ping Test Result: Success. opensearch version 3.2.0 (262,613)</i>
User Name	Enter the user name to connect to the search engine.
Password	Enter the password associated with the user name.
Test Login	Click to test the credentials you have specified against the search engine. A positive result displays a success message. <i>Login Success. (262, 615)</i>

Field or Control	Description
Proxy User	Enter a trusted entity. This enables the PeopleSoft system to log into the search engine using a proxy identity to run a query. This proxy account is a Trusted Entity. You may need to contact your administrator to obtain Trusted Entity credentials or to have those credentials created for the Search Framework query service. Important: Even though the Search Framework is authenticated by the search engine as the Trusted Entity, the search engine uses the identity of the currently signed on PeopleSoft user for query authorization. Note: Proxy User acts as an authentication user for every search request.
Proxy Pwd	Enter the password associated with the trusted entity.
Proxy Login	Click to test the credentials you have specified against the search engine. A positive result displays the success message. <i>Login Success (262,615)</i>
+ (plus sign)	Click the + (plus) sign in the grid to enter details of another node if you plan to implement fail-over mechanism. Note: Oracle PeopleSoft recommends a three-node cluster initially. Then, depending on the hardware, memory availability, and search performance, you may add nodes to the existing cluster.

Note

From PeopleTools 8.63, search indexing supports high availability when two or more cluster nodes are configured for a search instance. The indexing process uses the first active node and fails only when all configured nodes are inactive or the search cluster is not available.

See [Understanding Clusters in OpenSearch](#).

Field or Control	Description
OpenSearch Interact	Click this link to open the OpenSearch Interact page that enables you to choose the cluster and index level options on which you want to obtain information from the search engine. See Administering OpenSearch Using the OpenSearch Interact Page .

OpenSearch Dashboards

This section contains details of the server where OpenSearch Dashboards is installed.

Field or Control	Description
Host Name	Enter the server name of the host where OpenSearch Dashboards is running, including the domain. The host name value can be a DNS name or an IP address. For example, <i>example.com</i> Note: OpenSearch Dashboards can be installed on the same server as OpenSearch or on a separate server. Oracle recommends that you install OpenSearch Dashboards on one of the OpenSearch nodes in the cluster to ensure better connectivity between OpenSearch and OpenSearch Dashboards.
Port	Enter the port on which OpenSearch Dashboards listens for requests. Note: The default port for OpenSearch Dashboards is 5601. Note: The application requires an open port to directly access Insights in the PeopleSoft. You can disable the firewall for the OpenSearch Dashboards port in which it is installed.
SSL Option	Select one of the options for SSL: - Select DISABLE in the following scenarios: - If SSL is not implemented on OpenSearch Dashboards. - If http is implemented on both PeopleSoft and OpenSearch Dashboards. - Select ENABLE in the following scenarios: - If SSL is implemented on both PeopleSoft and OpenSearch Dashboards. - If https is implemented on PeopleSoft and SSL is implemented on OpenSearch Dashboards. Note: The setup needs to be either all SSL or all non-SSL. A situation in which one component is in SSL and another is in non-SSL is not permissible. For more information, see Configuring SSL for OpenSearch Dashboards.

Logstash

This section contains details of the server where Logstash is installed.

Field or Control	Description
Host Name	Enter the server name of the host where Logstash is running, including the domain. The host name value can be a DNS name or an IP address. For example, <i>example.com</i>.
Logstash Port	Enter the port on which Logstash listens for requests. Note: The default port for Logstash is 9800.
SSL Option	Select one of the options for SSL: • Select DISABLE in the following scenarios: – If SSL is not implemented on Logstash. – If http is implemented on both PeopleSoft and Logstash. • Select ENABLE in the following scenarios: – If SSL is implemented on both PeopleSoft and Logstash. – If https is implemented on PeopleSoft and SSL is implemented on Logstash. Note: The setup needs to be either all SSL or all non-SSL. A situation in which one component is in SSL and another is in non-SSL is not permissible.
Ping	Click to make sure your host name and port are correct and that the search engine is available. A positive result displays a success message.

Note

Use the Ping button only when External Data Integration for PeopleSoft is configured using Logstash. If External Data Integration is not configured, a Ping failure on the default Logstash port is expected.

Call Back Properties

The callback properties are used to perform a callback to PeopleSoft to fill in data such as search attribute values, so you need to provide the URL and password for this access.

Note

PeopleSoft Search Framework uses the REST ListeningConnector for callback.

Field or Control	Description
URL	Enter the URL for the PeopleSoft system listening connector, using the following syntax. <pre>http://<server>:<port>/PSIGW/RESTListeningConnector/<node></pre> Note: If the callback URL is https and if SSL is not configured on OpenSearch, then the PeopleSoft root CA needs to be installed in the OpenSearch truststore and the truststore path and password should be specified in the <code>opensearch.yml</code> configuration file. If OpenSearch is behind a load balancer and the setting is to terminate SSL at load balancer, the <code>orclssl.callback</code> property should be set to false in the <code>opensearch.yml</code> configuration file.
User Name	Enter the PeopleSoft user name granted the permission list PTPT3300. This user must have the Search Server and Search Query Administrator roles. Note: This user name must exist as an active user profile on the PeopleSoft system listed in the URL specified. This is generally a system user as opposed to an interactive user. In addition, if you have attachments on an FTP server that will be accessed by the search engine, this user must also be authorized to access the FTP site.
Password\Confirm Password	Enter and confirm the password associated with the PeopleSoft user name.
Validate	Click to validate the URL, service operations, and credentials you have entered. A positive result displays the following message on the Validation Report page: <i>All validations are successful.</i> The following service-operation validations are performed to confirm: • Service operations related to PTSF are active. • Handlers corresponding to service operation are active. • Routers corresponding to service operation are active. • Service operation alias name matches with router alias name. • Service-operation security is set.

Field or Control	Description
Update deployed definitions	Click this link to invoke a bulk update for all definitions currently deployed to the search engine. If you have changed any of the callback properties (URL, user name, or password), all currently deployed search definitions need to be updated with the new callback values to continue successful interaction with the Search Framework.
Set Namespace Aliases	Click this link to set namespace aliases when you clone an environment. See Setting Namespace Aliases for more information.
Save	When you save a search instance, OpenSearch creates an <code>orcl_es_auth</code> index that stores the callback service URL for each PeopleSoft database. When a user accesses OpenSearch Dashboards in PeopleSoft, the user is authenticated using the callback service request to the <code>orcl_es_auth</code> index of a specific database.

Modifying Search Instances

You can modify any of the search instance values if the information changes for the specified server. That is, if the server receives a new IP address or a new DNS name, if the port for the search services changes, or if any credentials change, then the values can be updated as needed.

Important

You may not reuse a search instance entry for an entirely new instance of a search server if the existing search instance contains deployed search definitions and search categories. If you reuse an existing search instance entry that contains deployed search definitions and search categories, it may cause deployment errors.

Deleting Search Instances

Deleting a saved search instance is not supported.

Sharing a Search Instance Among Multiple PeopleSoft Application Systems

If you have multiple PeopleSoft applications, you can share a single search instance among the PeopleSoft systems. When sharing a search instance, keep these items in mind:

- Single sign-in needs to be implemented among all of the PeopleSoft systems sharing the search instance.
- To enable menu search in a cluster environment, you need to run the Remote Search Group Configuration plug-in in Automated Configuration Manager.

PeopleTools delivers the Remote Search Group Configuration plug-in, which is grouped under the Cluster_Template template. See Automated Configuration Management for information on running a template.

When you import remote search groups, source and target PeopleSoft environments have to be mapped to the same search instance. For example, if HCM is mapped to search instance 1 and FSCM is mapped to search instance 2, and if cluster environment is mapped to search instance 1, then importing search groups from HCM to cluster environment is supported, however, importing search groups from FSCM to cluster environment is not supported.

- While you do not need to synchronize user profiles among multiple PeopleSoft systems, if the same user ID exists on multiple systems, it must be associated with the same, individual user. That is, a user ID must be unique for all of the systems sharing the search instance, not just a single PeopleSoft application.

Administering OpenSearch Using the OpenSearch Interact Page

OpenSearch provides several REST APIs that can be used to obtain details of a cluster or index in the PeopleSoft implementation. In the absence of a default user interface to administer OpenSearch, PeopleSoft provides a user interface (called OpenSearch Interact) that enables you to choose the cluster and index level options on which you want to obtain information from the search engine. Based on the selected options, PeopleSoft Search Framework generates a URL, which is submitted to OpenSearch, and the response is displayed on the OpenSearch Interact page. The OpenSearch Interact page is accessible from the Search Instance Properties page, and it provides administration requests only for those cluster and index validations that are exposed by PeopleSoft.

Access the OpenSearch Interact page (**PeopleTools**, and then **Search Framework**, and then **Search Admin Activity Guide**, and then **Configuration**, and then **Search Instance**) by selecting an OpenSearch search instance, and then selecting the OpenSearch Interact link on the Search Instance Properties page.

This example illustrates the fields and controls on the OpenSearch Interact page (initial). You can find definitions for the fields and controls later on this page.

The screenshot shows the 'OpenSearch Interact' window. It contains the following elements:

- Search Instance:** A text field with the value 'PTSF_DEFAULT'.
- Service Type:** A drop-down menu.
- Suggestions:** A drop-down menu.
- URL:** A text field with the value 'http://example.com:9200/'.
- Buttons:** 'Return' (bottom left), 'Submit' (top right), and 'Help' (top right, link).

This example illustrates the fields and controls on the OpenSearch Interact page after selecting an option from the Service Type drop-down list. You can find definitions for the fields and controls later on this page.

OpenSearch Interact

×

Help

Search Instance

PTSF_DEFAULT

Submit

Service Type

Cluster

▼

Cluster API

_cat/indices?v

▼

URL

https://example.com:9200/_cat/indices?v

↗

Result

This section displays the list of deployed search definitions.

↗

Field or Control	Description
Search Instance	The search instance name.
Service Type	Displays a list of service type groups. The following service type groups are available: - Cluster - Use the Cluster service type to retrieve information related to the OpenSearch cluster. - Count - Use the Count service type to retrieve the number of indexed documents related to search definitions. - Mapping - Use the Mapping service type to retrieve the attribute mapping information related to search definitions. - Search - Use the Search service type to retrieve index-level information related to search categories.

Field or Control	Description
Suggestions	The Suggestions field displays on the initial OpenSearch Interact page and it changes based on the service type you select. The Suggestions field changes to the following: • When you select Cluster as service type, the Suggestions field changes to Cluster API, which provides cluster related options: – Aliases - provides information on currently configured aliases, which includes indices, filter, and routing information. – Allocation - provides a summary of the number of shards allocated to each data node and the disk space used. – Count - provides the document count of the entire cluster or individual indices. The document count includes only live documents, that is, the document count does not include deleted documents that have not yet been cleaned up by the merge process. – Health - provides the general health of a cluster. The information is similar to the cluster information when you select the <code>/_cluster/health</code> option. – Indices - provides a cross-section of each index, and it spans nodes. – Nodes - provides a topology of the cluster, which includes the OpenSearch version, JVM version, heap, memory, load, uptime of a node, etc. – Plug ins - provides a list of running plug-ins in each node. – Shards - provides a detailed view of shards in a node. The detailed information includes whether its a primary or replica, the number of documents, the size of the shard in bytes, etc. – Cluster health - provides the general health of a cluster. It uses the color codes of green, yellow, and red. For a description of the color codes used for cluster health in OpenSearch, see Verifying the Cluster and its Nodes. – Cluster statistics - provides cluster-wide statistics. The statistics include basic index metric (such as shard numbers, store size, memory usage) and information about the current nodes that form the cluster (such as number of nodes, roles, operating system, JVM versions, memory usage, CPU, and installed plugins).

Field or Control	Description
	– Nodes statistics - provides statistics of all nodes in a cluster. By default, all statistics of a node are displayed. • When you select Count or Mapping as service type, the Suggestions field changes to Search Definition, which provides a list of deployed search definitions in the search instance. • When you select Search as service type, the Suggestions field changes to Search Category, which provides a list of deployed search categories in the search instance.
Method	The Method field is displayed when the service type is Search. Choose the type of HTTP request that needs to be issued to the search server. Valid options are: • GET • POST
URL	The URL is automatically formed based on the selected options. For example, if you select Cluster as service type and select cat/indices as the cluster API, the URL is automatically formed: <code>http://example.com:9200/_cat/indices?v</code> Note: The URL cannot be modified. To modify the URL, you need to change the options you have selected.
Body	The Body field appears when you select POST as a method. This field must contain a JSON request. The contents of the Body field are passed along with the request to the search engine.
Result	The Result area displays the response from the search engine for each request. PeopleSoft Search Framework displays the response from the search engine as is.

Setting Namespace Aliases

Namespace aliasing enables you to re-use an index or indices built on an environment (original environment) on another environment (which is referred to as “new environment” for purpose of differentiation), thus avoiding the necessity to re-index the same search definitions on the new environment. The namespace aliasing feature is handy when you need to clone environments or when the middle-tier changes.

When you need to clone an environment, for example, you clone a test FSCM environment (FSCMTEST), where all the search definitions in FSCMTEST are already indexed to a search server, as a staging FSCM environment (FSCMSTAGING), you can re-use the index or indices of FSCMTEST from the FSCMSTAGING environment that is connected to the same search server by setting up namespace aliasing.

When the Application server or Web server changes, but is connected to the same database, you can use namespace aliasing to map the new environment to the original environment and thus re-use the index or indices of the original environment.

The namespace aliasing feature enables you to map the database name, node name, and node URI of the new environment to the original environment where the indices are built. The new environment re-uses the indices on the original environment, so users can perform search in the new environment without having to wait for indices to be built. Also, you can perform incremental indexing to update the indices from the new environment.

You can use the Namespace Alias Settings page to set namespace aliasing or you can use the PTSFConfigureSearch plug-in in Automated Configuration Manager to set namespace aliasing.

Access the Namespace Alias Settings page by selecting **PeopleTools**, and then **Search Framework**, and then **Search Admin Activity Guide**, and then **Configuration**, and then **Search Instance**. Then click the Set Namespace Aliases link.

Alternatively, access the Namespace Alias Settings page by selecting **PeopleTools**, and then **Search Framework**, and then **Administration**, and then **Custom Namespace Settings**.

This example illustrates the fields and controls on the Namespace Alias Settings page. You can find definitions for the fields and controls later on this page.

Namespace Alias Settings

Map the cloned and original database names and their corresponding node names

Database Name Aliases			
Personalize Find			
First 1 of 1 Last			
	Database Name	Database Alias Name	
1	H9201CHC	H9201CHA	

Node Name Aliases			
Personalize Find			
First 1 of 1 Last			
	Node Name	Node Alias Name	Alias Node URI
1	H9201CHC	H9201CHA	http://myserver.company.com:8000/psc/h9201ch

Save Cancel Clear Data

Field or Control	Description
Database Name	The name of the database in the new environment. You may enter the same database name as in the original environment.
Database Alias Name	The name of the database in the original environment.
Node Name	The name of the node in the new environment. You may enter the same node name as in the original environment.
Node Alias Name	The name of the node in the original environment.

Field or Control	Description
Alias Node URI	The node URI in the original environment. When you enter the URI, follow this syntax: <i>http or https://<hostname>:<port>/psc/<sitename>/</i> Optionally, you can copy the URI entered for the node in the Content URI Text edit box on the Node Definitions page (Portal tab).
Clear Data	Clears the data entered on the page and also removes it from the database.

Administering Search Instances

To administer search instances, access the Search Instance Administration page by selecting **PeopleTools**, and then **Search Framework**, and then **Administration**, and then **Prioritize Search Instances**.

Search administrators can use the Search Instance Administration page to specify the priority for each search instance.

This example illustrates the fields and controls on the Search Instance Administration page. You can find definitions for the fields and controls later on this page.

Search Instance Administration

Search Instance Administration

		  1-1 of 1   View All	
	Search Instance	Search Provider	Priority
1	PTSF_DEFAULT	OS	1

Field or Control	Description
Search Instance	Lists the search instances created in PeopleSoft Search Framework.
Search Provider	Lists the search provider associated with a search instance.

Field or Control	Description
Priority	Allows Search administrators to set the sequence in which the available search instances are to be used when any of the search instances fail. The lowest number is 1 and it has the highest priority. The search instance with the priority set at the lowest number has the highest priority, and it will be set as the default search instance. When you create a search instance on the Search Instance Properties page, the new search instance is assigned a sequence number. You can use this page to specify the sequence that you want.

Assigning Users to a Search Instance for Validating Indexes

When you deploy an index on a new search instance, you may want to validate or test the index before you roll out the index in a production environment. Search administrators can use the Search User Instance page to assign users to a search instance on which the deployed index needs to be validated or tested.

Note

When you assign a user to a search instance using the Search User Instance page, you override the priority setting specified on the Search Instance Administration page for the particular user.

To assign users to a search instance where a deployed index needs to be validated or tested, access the Search User Instance page by selecting **PeopleTools**, and then **Search Framework**, and then **Administration**, and then **Search Instance by User**.

This example illustrates the fields and controls on the Search User Instance page. You can find definitions for the fields and controls later on this page.

Search User Instance

The screenshot shows the 'Search User Instance' page. At the top, there are navigation links: 'Personalize', 'Find', and a grid icon. To the right are 'First', '1 of 1', and 'Last' buttons. Below this is a table with two columns: 'User ID' and 'Search Instance'. The first row of the table contains the values '1 QEDMO' and 'PTSF_DEFAULT'. There are search icons (magnifying glasses) next to each input field. To the right of the 'Search Instance' field are '+' and '-' buttons. Below the table is a 'Save' button.

Field or Control	Description
User ID	Select a user to whom you want to assign the task of validating or testing an index that is deployed.
Search Instance	Select a search instance where you have deployed an index, which needs to be validated or tested before deploying the index to a production environment.

 Note

You would use this page to test new search instances as they come online. It does not need to be specified for all users.

Creating a Search Instance in Automated Configuration Manager

The Automated Configuration Manager (ACM) framework enables you to store environment configuration settings in a template stored in the database or an external template file, which you can reapply when needed. You can use SEARCH_TEMPLATE in ACM to configure a search instance.

Using ACM allows you to automate the creating of search instance and deploying/indexing of search definitions. Though, you can create a search instance and deploy/index search definitions in a single execution of the template, PeopleSoft recommends to create the search instance first and then deploy/index the required search definitions.

Complete these steps to create a search instance and deploy/index search definitions:

1. Select **PeopleTools**, and then **Automated Config Manager**, and then **ACM Templates**, and then **Template Definition**.
2. Search for and open SEARCH_TEMPLATE.
3. On the Configuration Template Definition page, verify that the Configure Search Instance plugin is selected, and then select the Properties icon.
4. Specify the properties for the plug-in on the Configure Search Instance page.

If OpenSearch Dashboards is installed, specify the properties associated with OpenSearch Dashboards.

For descriptions of each of the properties, see Automated Configuration Management: PTSFConfigureSrchInstance.

5. Ensure that the Configure Search Instance plug-in is selected and the Deploy Search Definition plug-in is *not* selected.
6. Save the template and click Execute to begin the program run.

If the program run is successful, the system displays a success message, that is, a search instance is created. After successfully creating a search instance, proceed with the steps of deploying/indexing the required search definitions.

To verify that the search instance has been configured for the search engine, select **PeopleTools**, and then **Search Framework**, and then **Search Admin Activity Guide**, and then **Configuration**, and then **Search Instance**.

7. On the Configuration Template Definition page, verify that Deploy Search Definition is selected and click the Properties icon.
8. Specify the properties for the plug-in on the Deploy Search Definition page and click OK.
For description of each of the properties, see Automated Configuration Management: PTSFAdministerSearch.
9. Ensure that the Deploy Search Definition plug-in is selected and the Configure Search Instance plug-in is *not* selected.
10. Save the template and click Execute to begin the program run.
If the program run is successful, the system displays a success message.
To verify the required search definitions are deployed and indexed, select **PeopleTools**, and then **Search Framework**, and then **Search Admin Activity Guide**, and then **Administration**, and then **Schedule Search Index**.

Enabling Global Search

Global Search is enabled by default based on three conditions:

- At least one search index must be deployed and crawled on the system and this search index is set as a Search Group.
- A user accessing global search must have the required permissions for the deployed search index.
- A user accessing global search must have access to the Fluid Global Search component.

When Global Search is enabled, the Global Search bar appears in the portal header.

Note

If a user does not have access to any search groups by way of their permissions lists, they will not see the Global Search bar.

Related Topics

- [Working with Global Search](#)
This section provides an overview of working with global search.

Managing General Search Options

Use the Search Options page to manage global settings for your search configuration.

Warning

These options apply to *all* deployed search indexes. Changing options after deployment may require index updates or redeploy.

Select **PeopleTools**, and then **Search Framework**, and then **Search Admin Activity Guide**, and then **Administration**, and then **Search Options**.

Alternatively, select **PeopleTools**, and then **Search Framework**, and then **Administration**, and then **Search Instance Options** or select the Search Options Config link on the Search Instance Properties page.

This example illustrates the fields and controls on the Search Options page. You can find definitions for the fields and controls later on this page.

Search Options

Search Instance

PTSF_DEFAULT

Default Values

Number of Shards

1

Number of Replicas

0

Minimum Document Count

1

Maximum Facet Children

100

Disable Facet Count

N

Min Match Percent

100

Cache Interval (Min)

120

Index Segment Size (MB)

10

Log requests for User ID

Log metrics for User ID

Enable Attachment Trace

N

Number of Indexing handlers

5

Max Sub Queue Size

20

Max Attachment Error Count

100

Full DirectTransfer

Y

Maximum Tree Facet Nodes

1000

Expand Tree Facet

N

Number of Days for Recent Ranking

30

Maximum Results in Suggestion Search

50

Recent Documents Retention (days)

365

Index Refresh Interval (sec)

10

Heartbeat Interval (sec)

2

Real Time Indexing Set size

300

Real Time Indexing Threshold

10000

Number of Recent Results

5

Use Search Context Sequence

N

Enable Stemming

Y

Enable Typo Tolerance

Y

Field or Control	Description
Search Instance	Enables you to select the search instance for which you want to specify the global settings.

Field or Control	Description
Number of Shards	OpenSearch enables you to distribute the indexed data into partitions. Default value is 5. The value entered here is applicable to all search definitions deployed from this PeopleSoft machine to the search server unless it is overridden. You can override the value by selecting Index Settings on the Deploy Search Definition page (PeopleTools, and then Search Framework, and then Search Admin Activity Guide, and then Administration, and then Deploy/Delete Object). Note: The value of this parameter cannot be changed when an index is in deployed status. See OpenSearch Concepts and Terminology.
Number of Replicas	A replica is a copy of the indexed data in a primary shard. OpenSearch uses replicas for recovery management in the event of a failure in the primary shards. Set the number of copies you want to maintain of the primary shards. Note: In a multi-node OpenSearch cluster, always ensure that the replica value is set to at least 1 so that in the event of a node failure data loss does not happen. The maximum number of nodes that can be down without loss of data will be equal to the number of replicas (where replica count is less than <i>N</i>, that is, the number of nodes in a cluster.) The value entered here is applicable to a search instance and to the security index (orcl_es_acl). See Setting the Number of Replicas. Note: After the index is created, you may change the number of replicas dynamically anytime. You can override the value by selecting Index Settings on the Deploy Search Definition page (PeopleTools, and then Search Framework, and then Search Admin Activity Guide, and then Administration, and then Deploy/Delete Object). See OpenSearch Concepts and Terminology.
Minimum Document Count	Set the minimum number of search results (documents) required to display a facet. Default is 1. This property can be overridden by selecting Advanced Settings on the Facets page (PeopleTools, and then Search Framework, and then Search Designer Activity Guide, and then Search Category, Facets, Advanced Settings).

Field or Control	Description
Maximum Facet Children	Set the maximum number of children to be returned for each facet node. Default is <i>100</i>. Options to enter are: - An integer greater than 0 to limit the number of children displayed. 0 to indicate no children should be displayed. -1 to return all children (no limit). This property can be overridden by selecting Advanced Settings on the Facets page (PeopleTools, and then Search Framework, and then Search Designer Activity Guide, and then Search Category, Facets, Advanced Settings).
Disable Facet Count	Enables controlling the display of the result count (document count) for each facet node. For example, if 15 search results met a facet node's criteria, (15) appears next to the facet label. Enter <i>Y</i> for Yes or <i>N</i> for No. - N: Returns the document count. Default is <i>N</i>. - Y: Shows no document count.
Min Match Percent	Enables controlling the display of search results based on the percentage of search keywords found in a document. The default value is 100. A value of 100 will display a document in search results only when all the search keywords are found in the document. A value of 50 will display a document in search results if at least 50% of the search keywords are found in the document.
Cache Interval (Min)	Set the duration of time (in minutes) for storing the security cache of a user. The default value is 120 minutes. For the security values, the system registers the time it is cached in the search index. If the duration of search time and cached time exceeds the cache interval or if the values are not available in the cache, the security values are obtained by a callback to PeopleSoft. The <i>acl.cache.delete.interval</i> property in the <i>opensearch.yml</i> configuration file runs a delete thread every 24 hours to clean the stale cache that has exceeded the cache interval. The default value is 24 hours. You may modify the value to run the delete thread at a frequency that you want.

Field or Control	Description
Index Segment Size (MB)	Set the size, in megabytes, by which the system segments (or chunks) the indexing data feed. Default is 10 megabytes. When the index segment size goes higher, the consumption of available resources such as JVM size, CPU, etc. also goes high. In a parallel processing enabled environment (that is, an environment with more than one sub handler), the segment size should be adjusted to the optimum level based on the available resources.
Log requests for User ID	Enter a user ID for which you want to log OpenSearch requests and responses. The OpenSearch requests and responses are written to the trace log file. Note: Only one user ID can be entered at a time.
Log metrics for User ID	Enter a user ID for which you want to log query performance metrics, that is, the time taken by OpenSearch to execute a query. The OpenSearch query performance metrics are written to the trace log file as part of the OpenSearch response. Note: Only one user ID can be entered at a time.
Enable Attachment Trace	Enables controlling the detailed logging of each task on the trace file. You should consider setting this property to <i>Y</i> if you are planning to use trace files to troubleshoot any errors associated with the transfer of search data from PeopleSoft to the search engine. Enter <i>Y</i> (yes) if you want to enable detailed logging of each task on the trace file. Enter <i>N</i> (no) to disable logging of each task on the trace file.

Field or Control	Description
Number of Indexing handlers	This property is associated with the direct transfer of search data from PeopleSoft to the search engine, which bypasses the Integration Gateway. The default value is 5. Note: When Full Direct Transfer is enabled, this property is applicable for search documents with attachments and without attachments, but when Full Direct Transfer is not enabled, this property is applicable only for search documents with attachments. Set the number of handlers that will be used to transfer data asynchronously to search engine. Each handler can transfer data to the search engine in parallel. For example, if you set the value of handlers to 5, it means that during indexing a maximum of 5 handlers are created. The handler value should be less than the bulk thread queue size on OpenSearch (default value of bulk thread queue size is 50). Note: The number of handlers should be set based on the size and volume of the attachments and the heap size that is set for OpenSearch. You need to remember that a large number of parallel threads can cause congestion in OpenSearch queue, which directly reduces the heap availability. If you are getting a number of OpenSearch rejections when indexing, reduce the number of handlers to 5. See Configuration.

Field or Control	Description
Max Sub Queue Size	This property is associated with Integration Gateway, so this property is applicable only when the Full Direct Transfer property is set to N, that is, the search documents without attachments are transmitted through the Integration Gateway. Maximum subscription queue size indicates the maximum number of IB subscription queues that are running in parallel for indexing a given search definition. For example, if your environment has 10 subscription handlers in IB, and if you want to dedicate only three subscription handlers for search indexing purpose, you should enter the value as 3 for this property. Note: The value entered for this property depends on the actual number of subscription handlers services activated in application server. Before you enter a value for this property, you should consider the actual number of subscription handlers services activated in application server. If you enter a value greater than the actual number of subscription handlers services, the system will use all the available subscription handlers services even though the Sub Queues would be partitioned based on the value entered for this property.
Max Attachment Error Count	This property is associated with the direct transfer of search data from PeopleSoft to the search engine, which bypasses the Integration Gateway The maximum number of exceptions that should be displayed on the Attachment Transfer Exception Details page. The default value is 100. When the number of exceptions exceeds the maximum number, the PTSF_GENFEED Application engine program is aborted, and you must re-submit the Application Engine program. See Viewing Search Index Build Process Details. See Configuration.
Full Direct Transfer	The default value is Y. When the Full Direct Transfer setting is set to Y (yes), search documents with or without attachments are directly transmitted to the search engine. If you set the Full Direct Transfer setting to N (no), then search documents without attachments are transmitted through the Integration Gateway, but the search documents with attachments are directly transmitted to the search engine. See Configuration.

Field or Control	Description
Maximum Tree Facet Nodes	Set the maximum number of tree facet nodes to be returned for each facet. Default is 1000. For the Search Test page, this property can be overridden by selecting Additional Details in the Facet Request group box. (PeopleTools, and then Search Framework, and then Search Admin Activity Guide, and then Testing and Utilities, and then Search Test Page, Facet Request, Additional Details)
Expand Tree Facet	This property specifies whether the tree facets should be expanded or collapsed. The default value is N, that is, collapsed. By setting the default behavior to collapsed, the tree facet displays a higher number of level 1 nodes.
Number of Days for Recent Ranking	The Number of Days for Recent Ranking property is associated with the suggestions that are provided on the search box. This property specifies the number of days the pages visited by a user should be considered for ranking the pages as recently visited. The default value is 30, that is, the pages visited by a user during the last 30 days are considered for ranking. This is a dynamic property, that is, you can change its value without having to redeploy the index. For more information on ranking of pages, see Working with Suggestions Search.
Maximum Results in Suggestion Search	The Maximum Results in Suggestion Search property is associated with the suggestions that are provided on the search box. This property specifies the maximum number of suggestions that should be displayed, which includes the recently visited pages and suggested pages. The default value is 50 and it is also the maximum supported value, that is, you cannot increase the value. However, you may reduce the number of suggestions displayed. This is a dynamic property, that is, you can reduce the value without having to redeploy the index. For more information on suggested menu items, see Working with Suggestions Search.

Field or Control	Description
Recent Documents Retention (days)	The Recent Documents Retention property is associated with the suggestions that are provided on the search box, which includes both recent menu suggestions and recent content keyword suggestions provided the corresponding indexes are enabled for real-time indexing. This property specifies the number of days the recent documents should be retained. The default value is 365. Warning! The indexes may tend to grow large considering that the indexes hold the recently accessed menu and content keyword data for a year. This is a dynamic property, that is, you can change its value without having to redeploy the index.
Index Refresh Interval (sec)	Set the duration of time (in seconds) after which indexes in the search engine are refreshed or saved. That is, after every specified number of seconds, the indexes are refreshed or saved. The search engine aggregates all the documents received for indexing up to the specified interval and then saves to the index. This setting is to improve the performance of indexing in the search engine. The lowest value possible is 1 second. The default value is 10 seconds. If you set the interval duration to a higher value, it improves the indexing speed, but if you set the interval duration to a lower value, the indexed data is closer to being near real time. However, a lower value also means that the search server is busy performing this task. Warning! The Index Refresh Interval property is applicable to all deployed search definitions irrespective of whether real-time indexing is enabled or not in a search definition.
Heartbeat Interval (sec)	The Heartbeat Interval property is associated with real-time indexing. Set the duration of time (in seconds) for the real-time indexing server process to sleep when no rows are submitted for processing. The server process looks for any new rows to index after the specified interval. You should set this property in accordance with the frequency of online transactions. The default value is 2 seconds. Note: If you modify the value of this property, you should restart the Process Scheduler domain.

Field or Control	Description
Real Time Indexing Set Size	Specify the maximum number of transactions in one set for real-time processing. The default value is 300. That is, a set can have a maximum of 300 transactions. Any increase in this value will adversely affect the runtime execution of real-time indexing. See Understanding Set-Based Processing in Real-Time Indexing. Note: If you modify the value of this property, you should restart the Process Scheduler domain.
Real Time Indexing Threshold	Specify the highest count of rows or transactions in the primary staging table. The Real Time Indexing Threshold property is used in the real-time indexing maintenance AE program (PTRTI_TRUNC) to de-fragment the staging table when the count of rows exceeds the threshold value. See Using an Application Engine Maintenance Program. Note: If you modify the value of this property, you should restart the Process Scheduler domain.
Number of Recent Results	Set the number of recent search results required to display in the suggestion search. Default is 5.
Use Search Context Sequence	Specify the order in which the search groups in Global Search appear. Default is N. Enter <i>Y</i> for Yes or <i>N</i> for No. • Y: To display the search groups as they appear on the Define Search Context page. • N: If you want to list the search groups in alphabetical order.

Field or Control	Description
Enable Stemming	Enables controlling the stemming feature for search. Default is Y. This system-wide property applies to all search definitions unless it is overridden at the search definition level during deployment. When stemming is enabled, the words to be indexed are tokenized into algorithmic short forms and stored in the document. During a search, the same logic is applied to the specified keyword to find matching results. When stemming is disabled, words are indexed in their complete form. During a search, the system performs exact keyword matching and returns results only when the entered keyword exactly matches the indexed data. Enter Y for Yes or N for No. - Y: Enables stemming. The system returns results based on root-based matching. - N: Disables stemming. The system returns only exact matches for the entered keyword. Related words derived from the same root are not considered. Changes to this option require redeploying and reindexing the search definition.
Enable Typo Tolerance	Enables controlling the typo tolerance feature for Suggestion Search. Default is Y. When typo tolerance is enabled and the initial search returns no results, the system uses the OpenSearch Phrase Suggester to identify the best suggestions and reruns the search with the corrected keyword. Enter Y for Yes or N for No. - Y: If Suggestion Search returns no results, the system automatically corrects the keyword and re-executes the search. - N: Disables typo tolerance for Suggestion Search. When disabled, the system does not request suggestions and a misspelled keyword may return no results. To know more about OpenSearch Phrase Suggester, refer to the OpenSearch [3.2], which is available on www.opensearch.org.

Administering Search Definitions and Search Categories

This section contains an overview of search definitions and search categories.

Understanding Search Definition Administration

You create search definitions using the Search Framework Designer Activity Guide after the data is identified using PeopleSoft Query and Connected Query. You use the Search Framework Administration Activity Guide to deploy the search definitions and manage the search definitions on the search engine.

Before end users can run searches against the search indexes, the search definitions need to be deployed to the search engine so that the search engine can create the structure of the search index based on the search definition, crawl the defined search criteria, and populate the index with the results of the search definition query. When your search definitions are deployed on the search engine, they become a source.

Once the search definitions are deployed to the search engine, you use the Search Framework administration Activity Guide to manage them by sorting them in search categories, updating them, undeploying them, or deleting them as needed.

Working with Search Definition Deployment

To manage search definitions, access the Search Definitions page by selecting **PeopleTools**, and then **Search Framework**, and then **Search Admin Activity Guide**, and then **Administration**, and then **Deploy/Delete Object**.

This example illustrates the fields and controls on the Deploy Search Definition page. You can find definitions for the fields and controls later on this page.

Deploy Search Definition

Deploy Search Category

Deploy Search Definition

Deploy definition to search server

*Search Instance

PTSF_DEFAULT

Q

Search Category Name

Q

Filter by name

Deploy Search Definition

Q

<>

1-5 of 5

<>

	Definition	Description	Deploy Status	Crawl Status	Run Date/Time	User/Run Control ID	Index Settings
☐	1	PTPORTALREGISTRY	Navigator	Deployed	Successful		Index Settings
☐	2	PTSEARCHREPORTS	Reports	Deployed	Successful	09/23/2024 1:00:12AM	Index Settings
☐	3	PTSF_INSIGHTS	Insights	Deployed	Successful		Index Settings
☐	4	PTSF_RECENTMENU	Recent Menu Items	Deployed	Successful		Index Settings
☐	5	PTSF_RECENT_KW	Keyword Search Definition	Deployed	Successful		Index Settings

Select All

Report Sync Issues

Audit

Deploy

Undeploy

Update

Delete

Field or Control	Description
Search Instance	Use to display only those search definitions associated with a particular search instance.
Search Category Name	Use to display only those search definitions associated with a particular search category.
Filter by name	Use to enter full or partial definition names to reduce the list of search definitions appearing in the grid. Note: The values are case-sensitive.

Field or Control	Description
Deploy Search Definition (grid)	Displays all existing search definitions defined in the Search Framework. Columns in the grid are: • Definition. Displays the name of the search definitions you've created. Deployable search definitions are having a data source created in Query or Connected Query, as well as being defined in the Search Framework Designer activity guide. • Description. Displays your search definition description. • Deploy Status. Displays the state of search definition deployment: A search Definition is either Deployed or Undeployed. • Crawl Status. Displays the status of the index build process for a search definition (Success, Fail, Not Crawled). • Run Date\Time. Displays the date and time of the most recent index build process run. • User\Run Control ID. Displays the user ID and the run control ID used to run the index build process. • Update Status. After running the Report Sync Issues audit, the results appear in this column indicating any required updates. • Audit Status. After clicking Audit for a selected search definition, the Audit Status column appears displaying the result (<i>Success, Fail</i>). • Audit Report. If the Audit Status is <i>Fail</i>, the Audit Report column appears providing a link to the audit report for review.

Field or Control	Description
Index Settings	Click to display the Advanced Index Settings dialog box where you can override some of the settings specified on the Search Options page. If you click the Index Settings link for a deployed search definition, you can change only the number of replicas. If you click the Index Settings link for a search definition that is not deployed, you can update the following settings: • Override Settings - Select this option if you want to override the settings specified on the Search Options page. • Number of Shards - Specify a new number of shards, if desired. • Number of Replicas - Specify a new number of replicas, if desired. Note:In a multi-node OpenSearch cluster, always ensure that the replica value is set to at least 1. For details, see Managing General Search Options. • Enable Synonyms - Select to enable synonym search for the index. This option is enabled by default. For details, see Disabling Synonym Search for an Index. • Exclude Attachments - Select to exclude the indexing of attachments for a specific search definition that has configured attachments. By default, the Exclude Attachments check box is unchecked, that is, the search definition is indexed with configured attachments. Note:This check box is disabled for the search definitions that do not have configured attachments. For details, see Excluding Attachment Search for an Index. Note: Before you change any of the values here, Oracle PeopleSoft recommends that you familiarize yourself with the functioning of the OpenSearch cluster in your implementation.
Select All	Click to select all the rows within the grid. Note: If all rows in the grid have been selected, the button title changes to Deselect All.

Field or Control	Description
Report Sync Issues	Runs an audit checking routine which reports where properties for a search definition differ between PeopleSoft and the search engine. If you have updated a deployed search definition, it will no longer be synchronized with the representation on the search engine. Results of this check appear in the Update Status column (which, in the case of differences between the corresponding definitions becomes the View Report column). This applies only to deployed definitions.
Audit	Click to run a series of audits on the selected search definitions to ensure they have all requirements in place. After running the audit process, these additional columns appear in the Deploy Search Definition grid: Audit Status and Audit Report. The Audit Status column will indicate <i>Success</i> or <i>Fail</i>. If the result is <i>Fail</i>, then the Audit Report column appears, displaying an Audit Report link, which you can click to review the audit results and correct the reported issues. See the section below: “Running the Search Definition Audit Process.”
Deploy	Deploy the PeopleSoft search definitions selected to the search engine, where it becomes a searchable data source. Note: You can deploy multiple search definitions at a time by selecting the corresponding check box in the first column of the grid and then choosing Deploy. Note: When you deploy a search definition, the search category of the same name is automatically deployed.

Field or Control	Description
Undeploy	Click to remove the representation of the selected search definitions from the search engine. Note: You can undeploy multiple search definitions at a time by selecting the corresponding check box in the first column of the grid and then choosing undeploy. Note: When you undeploy a search definition, the search category of the same name is automatically undeployed. Note: When you undeploy a search definition, the index is not searchable, that is, a search against that index will not display any search results. Warning! Oracle PeopleSoft does not recommend undeploying large indexes because re-indexing them requires additional time. However, for your business purposes, if you need to undeploy large indexes, it is recommended to undeploy them during the non-peak hours for performance reasons. The status of the search definition displays undeployed only after the actual deletion is completed. Undeploying a search definition mapped to a common index may take additional time.
Update	Click to update the representation of the search definition on the search engine. If you have modified a deployed search definition, the PeopleSoft version and the version on the search engine will no longer match. Definitions that need to be updated will appear in the synchronization report. Clicking Update synchronizes the search engine representation of the definition to match the PeopleSoft version.
Delete	Deletes the search definition from the Search Framework. This removes the search definition from the search definition list and from the search categories to which it is mapped. The underlying query and connected query are unaffected. Note: When you delete a search definition, the indexed data for that search definition is no longer available, so searches against that indexed data will not display any results. Important: Oracle PeopleSoft recommends that you do <i>not</i> delete delivered search definitions. Warning! Delete is not reversible! Do not use this function unless you are certain it is what you want.

Running the Report Sync Issues Process

By selecting an index (or several indexes) and selecting the Report Sync Issues button, Search Framework will add a column to the Deploy/Delete Object grid to report differences found between Search Framework and the default search engine.

Depending on the status of your search definitions in both the PeopleSoft system and the search engine, the results of the synchronization report will vary. This table describes some likely scenarios and the recommended action.

Update Status	Recommended Action
No update required for the definition.	No action is required. The definitions are identical between the two systems.
Update required definition out of sync.	Click the View Report link in the View Report column, and examine the reported differences. Resolve the differences as needed between the two systems, or click Update.
Definition unavailable in server.	Click the Reset Definition for Deploy link in the View Report column. This removes the previous definition on the search engine or any remaining settings related to it, making it available to be deployed again.
Undeployed definition. Choose a deployed definition.	Ignore the report if the definition is purposely undeployed, or deploy the definition.

Note

You need to take the appropriate action to fix the compare issue. This may include, but is not limited to using the Update button, manually deploying the category or undeploying the search definition and reloading it.

When you select View Report, you may see a screen similar to this:

This example illustrates the fields and controls on the Search Definition Compare Report page. You can find definitions for the fields and controls later on this page.

Compare Report

Help

Search Definition Compare Report

Compare report		Personalize Find  	First	1-4 of 4	Last
Property Type	Peoplesoft	Search Server			
1 Search Attribute	DESCR254	Absent			
2 Search Attribute	PORTAL_LABEL	Absent			
3 Search Attribute	PORTAL_PRNTLABEL_PORTAL_FLDR	Absent			
4 Search Attribute	PORTAL_SOURCE	Absent			

Return

Field or Control	Description
Property Type	Displays properties that have found to differ between the two systems. The values appearing in this column can be numerous, representing all the possible settings for a search definition, such as user ID, category, call back URL, and so on.
PeopleSoft	Displays the value defined for the search definition within the PeopleSoft system.
Search Server	Displays the value stored for the property on the search server.
OK	Click OK to leave the report and return to the previous page.

Running the Search Definition Audit Process

After selecting a search definition and clicking Audit, the system runs a series of audits on the search definition. The types of audits include checking to make sure:

- The underlying query or connected query exists.
- The user has permission to the query and the referenced records.
- The indexed fields exist in the query or connected query.
- The security App Class exists (if referenced in search definition).
- The pre processing AE library exists (if referenced in search definition).
- The post processing AE library exists (if referenced in search definition).
- The delete query exists (if referenced in search definition) and the user has permission to open the delete query.
- A search category with the same name as the search definition exists.
- The search definition belongs to at least one search category.

If the audit process finds no issues, the Audit Status column indicates Success. If the audit process does find issues, the system displays the Audit Report column containing a link to the audit report.

This example illustrates the audit related columns that appear after clicking Audit for a selected search definition.

Audit Status	Audit Report
Success	
Fail	Audit Report

If the audit discovers issues, the audit status gets set to *Fail*, and the **Audit Report** column appears. To review the issues on the Search Definition Audit Report page, click the **Audit Report** link.

This example illustrates the fields and controls on the Search Definition Audit Report page.

Audit Report

		1-1 of 1	
	Audit Type	Audit Comment	
1	User Role check	User does not have the role: Report Distribution Administrator	

Updating Definitions

In the event of updates being required, clicking Update makes the version of the search definition on the search server match the properties for that definition stored within the PeopleSoft system. After the process runs, you should see in the Update Status column the following message:

Updated definition <definition name>

Working with Search Categories

Search categories enable you to group search definitions within logical, manageable groups. You define search categories within the Search Framework Designer Activity Guide.

To manage search categories, access the Deploy Search Categories page by selecting **PeopleTools**, and then **Search Framework**, and then **Search Admin Activity Guide**, and then **Administration**, and then **Deploy/Delete Object**, and then **Deploy Search Category**.

This example illustrates the fields and controls on the Deploy Search Category page. You can find definitions for the fields and controls later on this page.

[Deploy Search Definition](#)

[Deploy Search Category](#)

Deploy Search Category

Deploy category to search server

*Search Instance

Filter by name

Deploy Search Category					Personalize	Find			First	1-172 of 172	Last
	Select	Definition	Description	Deploy Related Definition	Deploy Status						
1	☐	PTPORTALREGISTRY	Navigator	Deploy Related Definition	Auto Deployed						
2	☐	PTSEARCHREPORTS	Reports	Deploy Related Definition	Auto Deployed						
3	☐	PTWL_GEN_MSG_WL	Worklist Note	Deploy Related Definition	Auto Deployed						
4	☐	QE_ALL_CAT_CQ_SD1	QE All cat CQ SD1	Deploy Related Definition	Undeployed						

Select All

Report Sync Issues

Deploy

Undeploy

Update

Delete

Field or Control	Description
Search Instance	Use to display only those search categories associated with a particular search instance.
Filter by name	Use to enter full or partial definition names to reduce the list of search categories appearing in the grid.
Deploy Search Category (grid)	Displays all existing search categories defined in the Search Framework. Columns in the grid are: • Deployable Definition Name. Displays the name of the search categories you've created. Deployable search categories are those having been defined in the Search Framework Designer activity guide. • Description. Displays your search category description. • Deploy Related Search Definition. Click to display the Deploy Search Definition page with the grid populated only with search definitions within the selected search category. • Deploy Status. Displays these states of search object deployment: Deployed, Undeployed or Auto Deployed. Search categories will be automatically deployed (Auto Deployed) if a search definition with the same name is deployed. You need to deploy search categories covering multiple search definitions manually. That is, if the search category is undeployed, it must be manually deployed from this page. • Update Status. If you run a Report Sync Issues process from the Deploy Search Definition page, the process populates this column too if there are any differences between search categories on the two systems (PeopleSoft and the search engine).
Select All	Click to select all the rows within the grid. Note: If all rows in the grid have been selected, the button label changes to Deselect All.
Report Sync Issues	Runs an audit checking routine which reports where properties for a search category differ between PeopleSoft and search engine. If you have updated a deployed search category it will no longer be synchronized with the representation on the search engine. Results of this check appear in the Update Status column (which, in the case of differences between the corresponding categories becomes the View Report column). This applies only to deployed categories.

Field or Control	Description
Deploy	Deploy the PeopleSoft search category to the search engine. Note: You can deploy multiple search categories at a time by selecting the corresponding check box in the first column of the grid and then choosing Deploy. Important: You will receive a warning message when all search definitions contained within a category are not deployed, but as long as one search definition is deployed, you can deploy the search category.
Undeploy	Click to remove the search category from the search engine. You cannot undeploy an auto-deployed search category. You must undeploy the search definition of the same name and the auto-deployed category will be undeployed. Note: The search category will be removed from the search engine, but it will still exist within the PeopleSoft system. Note: This does not undeploy the search definitions associated with a search category.
Update	Click to update the representation of the search category on the search engine. If you have modified a deployed search category, the PeopleSoft version and the version on the search engine will no longer match. Categories that need to be updated will appear in the synchronization report. Clicking Update synchronizes the search engine representation of the category to match the PeopleSoft version.
Delete	Deletes the search category from the Search Framework. Note: This does not delete the search definitions associated with a search category. Warning! This is not reversible! Oracle PeopleSoft does <i>not</i> recommend deleting delivered search categories.

Working with Search Indexes

This topic provides an overview of index building process and discusses how to build an index.

Understanding the Index Build Process

In OpenSearch, an index is a logical namespace that maps to one or more primary shards and can have zero or more replica shards.

Before end users can submit search requests against the Search Framework deployed objects, the search indexes must first be built on the search engine. Prior to the index being built, a deployed search definition is an empty shell, containing no searchable data. A search index needs to be built for search definitions.

An Application Engine program, PTSF_GENFEED, builds the search index data and pushes it to Integration Broker, which makes it available to the search engine.

When an attachment is specified in a search definition, PeopleSoft Search Framework transfers the attachment data directly to the search engine using cURL and libcurl libraries and does not use the Integration Broker.

Creating a search index with the Search Framework involves the following technologies:

- Search Framework
- Application Engine
- Query/Connected Query Manager
- Process Scheduler
- Integration Broker
- cURL and libcurl Libraries

Once you invoke a search index build from the Build Search Index page, the system automatically completes these general steps:

1. The Schedule Search Index page initiates the PTSF_GENFEED Application Engine program.
2. The Pre Processing Application Engine program defined for the search definition runs.
3. PTSF_GENFEED Application Engine program runs the query (PeopleSoft Query or Connected Query) associated with the search definition.

Multiple PTSF_GENFEED Application Engine programs will run for a Connected Query in cases where users specify the number of partitions. See [Partitioning Application Data in the Search Index Build Process](#) for more information.

4. The query output becomes a data source for PeopleSoft Search Framework.

If a query field is masked, Search Framework treats the masked field in two ways:

- If a query field is masked, but bypassed for Search Administrator, then all data is indexed.
- If a query field is masked, but not bypassed, then Search Framework removes the field from indexing.

Note

If you want search query masking to take effect for data that has already been indexed, you should do a full indexing.

See Query: Using Query Administration for more information on bypassing a masked field.

5. The PeopleSoft Search Framework converts the query output to the JSON format and pushes the data to the search engine and the Delete query (for incremental indexing) defined for the search definition runs.

During this step, the following steps are also executed:

- If it is full indexing, a delete request is sent to the search engine to clear any indexed data that is present.
- If Full Direct Transfer is not enabled (segments of documents without attachments), on clearing indexed data, the data to be indexed is pushed to an Ordered IB Queue

(PTSF_ES_SEND_Q) partitioned with segments. IB Queue processes the data asynchronously based on the partition.

- If Full Direct Transfer is enabled, on clearing indexed data, the data is transferred to the search engine directly using cURL and libcurl libraries.
- The Delete Query is invoked when incremental indexing is run after a full index is built. Stale data is removed from the index as selected by Delete Query defined on the search definition.

Note

Each segment pushes the data in JSON format to the search engine synchronously (that is, waits for response from the search engine) and the response is read and acknowledged in PeopleSoft through exception handling.

6. The Post Processing Application Engine program defined for the search definition runs.

Related Topics

- [Monitoring OpenSearch System Metrics and Indexing Metrics](#)
PeopleSoft Search Framework delivers three dashboards and each dashboard displays several visualizations that provide you real-time data as well as historical data. These visualizations enable you to analyze data and act upon any errors if any. For example, you can use the historical data to view the indexing process and analyze any failed transaction and rectify it, if needed.

Building Search Indexes

A run control ID is bound to both, a search definition and a search instance.

Access the Build Search Index page by selecting **PeopleTools**, and then **Search Framework**, and then **Search Admin Activity Guide**, and then **Administration**, and then **Schedule Search Index**.

This example illustrates the fields and controls on the Build Search Index page. You can find definitions for the fields and controls later on this page.

Build Search Index

Run Control ID ITEM_DEFN
Report Manager Process Monitor Run

*Search Instance PTSF_DEFAULT Q

*Search Definition PTSEARCHREPORTS Q

☐ Index By Date Range

Language Option

☒ Base Language
☐ All Languages

Indexing type

☐ Full index
☒ Incremental Index

Full Indexing Criteria

Number of days to index 0 Index Start Date 01/01/1900

To build a Search Framework search index:

1. Select **PeopleTools**, and then **Search Framework**, and then **Search Admin Activity Guide**, and then **Schedule Search Index**.
2. Enter a run control ID.
3. On the Build Search Index page, select the appropriate options.

Field or Control	Description
Search Instance	Select the search instance in which you want to build the search index.
Search Definition	Select the search definition for which you are building the search index. Note: Once the Run Control is executed, the page becomes read-only. To change any parameters of the page, you need to create a new run control.
Index By Date Range	Select the Index By Date Range check box if you want to index data based on date range. The date range option enables you to partition the search data and run parallel indexing processes. Note: This property is not available if the Search Definition is configured with a data partition. Instead, Index By Data Partition is used. For more information on the date range option, see Partitioning Application Data in the Search Index Build Process .
Index By Data Partition	Select the Index By Data Partition option to index the data in parallel using data partition. For more information on the data partition option, see Partitioning Application Data in the Search Index Build Process Using Data Partition .
Language Option	Select one of the following: • <i>All Languages</i>. Builds an index for each language enabled on the database. • <i>Base Language</i>. Builds an index only for the base language defined for the database. Your selection depends on the languages enabled for your database and the languages through which you anticipate end users using to perform searches.

Field or Control	Description
Indexing Type	Select one of the following: • <i>Full index.</i> Crawls all transactional data specified by the query criteria and rebuilds the entire index. This option requires the most time. This option must be selected the first time an index is built. • <i>Incremental index.</i> Updates the existing index and adds only documents associated with rows that have been added or updated since the last index build or update. The system determines the required updates based on a comparison between the timestamp of the index and the “last updated” field for the data row. Items are also removed from the index as designated by the delete query on the search definition. Search Framework provides an automated way to schedule the incremental indexing. For more information, see Automating Incremental Indexing. Note:You must create one run control for incremental indexing, scheduled to run very frequently, and create another run control for full index rebuilding set to run less frequently. For example, incremental indexing might run daily, where a full index rebuild may be set to run every six months.
Full indexing Criteria	Applies only to full index builds. Displays the span of time in which the system will retrieve and index application data for this search definition. The date span is defined on the Advanced Settings tab for the search definition. This enables you to limit index processing for data that could potentially generate very large indexes, if needed. For more information on this option see, Working With Advanced Settings. If you plan to use the partitioning option through the Date Range grid, you must note that the indexing date span is overridden by the date span entered in the Date Range grid. For more information, see Partitioning Application Data in the Search Index Build Process.

4. Select Run.
5. Use Process Monitor to verify program completion and success.

Note

Once the Run Control is executed, the page becomes read-only. To change any parameters of the page, you need to create a new run control.

Viewing Search Index Build Process Details

After the PTSF_GENFEED program begins to run, you can view the details which display on the Build Search Index page for that run control ID.

Note

The Details section shows the results of the most *recent* feed generation for this Search Definition. It may not be the same run control ID as the one you selected. If the run control ID differs from the one you selected, it will be highlighted.

This example illustrates the fields and controls on the Previous schedule details. You can find definitions for the fields and controls later on this page.

Previous schedule details

Previous schedule status Success

Last Successful Index Built On 09/09/2016 2:29:31AM

AE Status Schedule success

Details

Process Instance 627 Message Log

Run Control ID PTSEARCHREPORTS

User ID QEDMO

Indexing type Incremental Index

Language Option Base Language

Field or Control	Description
Previous schedule status	Displays the status of the most recently executed index build process. When errors occur while processing attachments, an Error link is displayed. Click the Error link to view the exceptions on the Attachment Transfer Exception Details page. See Viewing the Exception Details in Attachment Processing .
Last Successful Index Built On	Displays the date when the index was built successfully. If an index was never built, it displays <i>Never</i> .

Field or Control	Description
AE Status	Indicates whether the most recently executed PTSF_GENFEED Application Program ran to completion. If the index build fails, this field displays the step where the process failed.
Resume schedule	Appears in the case where the index build failed. If the index build fails, you can use the Rebuild index option to regenerate the index. If the build fails, see Handling Common Errors to determine the cause of the failure to build an index.
Process Instance	Indicates whether the system successfully created the output that is required to populate the index.
Run Control ID	Displays the run control ID used to generate the index.
User ID	Displays the User ID who ran the run control, which may be a different user ID than the user who created the run control.
Indexing Type	Displays the index type (Full Index or Incremental Index).
Language Option	Displays the language options selected for the index build process (All Languages or Base Language).

Viewing the Exception Details in Attachment Processing

In the Previous schedule details section, select the Error link to view the details of exceptions with respect to attachment processing.

This example illustrates the fields and controls on the Attachment Transfer Exception Details page. You can find definitions for the fields and controls later on this page.

Attachment Transfer Exception Details

Search Definition QE_ES_ATTACHURL_PC_DB_CQ Rerun

Indexing has failed due to exceptions in the below transactions. Click on Rerun to resubmit the failed transactions

Select	Process Instance	Request	Response
1 ☐	602	QE_ES_ATTACHURL_PC_DB_CQ_1	View Response

☒ Select All ☐ Deselect All

Return

Field or Control	Description
Process Instance	The process instance ID of the PTSF_GENFEED Application Engine program that is causing the exception.
Request	The request sent by the PTSF_GENFEED Application Engine program to the search engine.
Response	The response received by the PTSF_GENFEED Application Engine program from the search engine.
Rerun	Use the Rerun button to resubmit the selected transactions to the search engine. In the case where the maximum exceptions limit is not reached, when you select the Rerun button, the transactions are directly submitted to the search engine without re-execution of the PTSF_GENFEED Application Engine program. In the case where the maximum exceptions limit is reached, the Rerun button acts as a re-submit of the PTSF_GENFEED Application Engine program.

Related Topics

- [Working with Attachment Properties](#)
This section provides an overview of attachment processing and the attachment properties supported by PeopleSoft Search Framework.

Partitioning Application Data in the Search Index Build Process

Indexing of search definitions that have reasonably large data volume can pose performance issues. To overcome such performance issues, PeopleSoft Search Framework enables you to partition the application data using the Index by Date Range option. After the date range and number of partitions are specified, the Partition Manager partitions the date range into equal date spans based on the number of partitions. The search index build process creates multiple PTSF_GENFEED Application Engine programs to run the query on the partitioned data. The search index build process also creates multiple run control IDs based on the number of partitions that enables you to re-run any of the run control IDs associated with a partition. The partitioning of application data is performed based on the date range and the number of partitions that are specified.

You can specify the number of partitions, but you cannot control the date span within a date range that is allotted for each partition. The Partition Manager allots the date span for the number of partitions specified by you. However, the Partition Manager does not consider data concentration to come up with the ranges. Hence, in case of large data volumes, the data distribution may not be equal for each partition range, resulting in some processes taking huge loads. Search Framework allows you to adjust these date ranges as needed to create an evenly spread data volume to index.

Partitioning of application data works best when the volume of data is evenly spread over the specified date range. The purpose of partitioning is to divide the data volume into chunks and to run a connected query on the partitioned data, so when you plan to use the partitioning option, you must consider whether the search documents for a specific search definition are spread evenly over a specific date range. That is, if within a date range, for example, 01/01/2017 to 03/31/2017, a huge volume of search data is concentrated in the month of

March and the other two months have few attachments, and you specify 3 partitions, then the partitioning may not be very effective because only one partition may get the bulk of the search documents, so you may still face performance issues.

The naming convention followed for run control IDs that are generated for each partition is as follows: `_<USERID>_RUNCNTL_<TIME>_<SEQUENCE NUMBER>`

For example, `_QEDMO_RUNCNTL_020022_2`

Note

Partitioning is available for both full and incremental indexing. However, Oracle PeopleSoft recommends that you use partitioning only with full indexing.

This example illustrates the fields and controls on the Build Search Index page after enabling the Index by Date Range option. You can find definitions for the fields and controls later on this page.

Build Search Index

Run Control ID: PTPORTAL_DTRANGE
[Report Manager](#)
[Process Monitor](#)

*Search Instance

*Search Definition

☒ Index By Date Range

Language Option

☒ Base Language
☐ All Languages

Date Range

Start Date
End Date
Number Of Partitions

	Start Date	End Date
1	01/01/2000	07/01/2000
2	07/02/2000	12/31/2001
3	01/01/2001	07/01/2001
4	07/02/2001	12/31/2002

Field or Control

Description

Start Date

Specify the start date of the date range.

End Date

Specify the end date of the date range.

Number of Partitions

Enter the number of partitions you want the search index build process to create.

Field or Control	Description
Apply	When you select the Apply button, Partition Manager creates partitions based on the specified number. You can then modify the date ranges. Note: Save the settings before you select the Run button.

After you use the partitioning option and run the indexing process, the Build Search Index page displays the following information.

Note

Do not use Date Range partitioning on any index that uses preprocessing unless the preprocessing has been modified to also use the date ranges. If you use Date Range partitioning on an index that uses preprocessing, it may cause unintended results.

This example illustrates the fields and controls on the Date Range grid. You can find definitions for the fields and controls later on this page.

Date Range

Start Date 
End Date 
Partition Count

	Process Instance	Start Date	End Date	Run Status	Message Log	Rerun
1	371	01/01/2000	08/31/2005	Success	Message Log	Rerun
2	372	09/01/2005	05/02/2011	Success	Message Log	Rerun
3	373	05/03/2011	12/31/2016	Success	Message Log	Rerun

Field or Control	Description
Process Instance	Search index build process creates multiple PTSF_GENFEED Application Engine programs for the specified number of partitions. Displays the process instance for each partition.
Start Date	Displays the start date (within the specified date range) for each partition.
End Date	Displays the end date (within the specified date range) for each partition.
Run Status	Displays the status of each process instance.
Message Log	If the run status displays error status, use the Message Log link to view the error message.
Rerun	Use the Rerun button to run the partitioned process again.

Partitioning Application Data in the Search Index Build Process Using Data Partition

Indexing Search Definitions with a large volume of data can take a long time to complete.

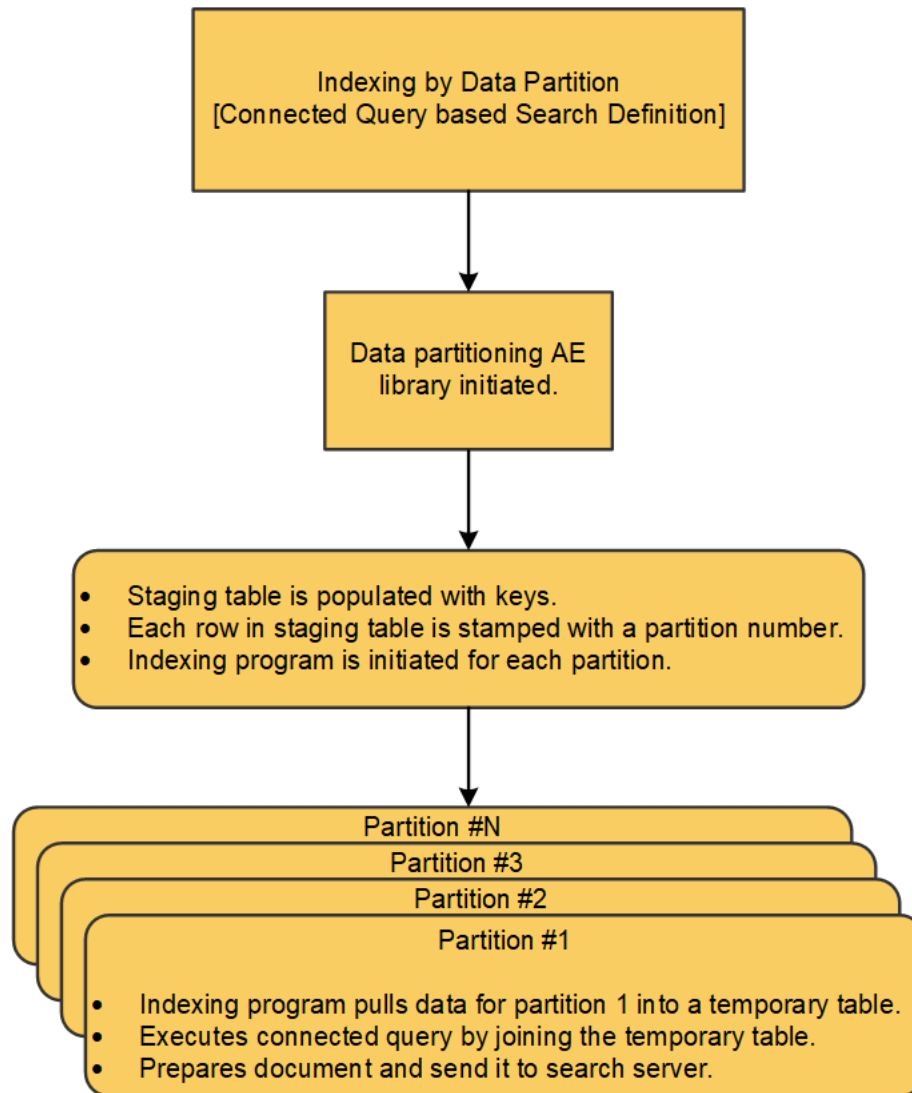
To overcome this issue, PeopleSoft Search Framework enables you to partition application data using the **Index By Data Partition** option. After you select any eligible field from the search definition (including date, datetime, non-date fields, or numeric fields) and specify the partition values along with the number of partitions, the framework partitions the data almost equally to process it in parallel. The search index build process then creates multiple PTSF_GENFEED Application Engine programs to run the query on each partitioned data.

Note

To index data for a specific field value or set of field values, specify both Field Name and Field Value. If these values are not specified, indexing process will continue as usual.

The run control IDs for each partition are auto generated with naming convention RUNCNTL_<NUMBER OF PARTITIONS>_<PARTITION NUMBER>.

The following illustration describes the process flow involved in partitioning application data using the Index By Data Partition option.



To enable the Index By Data Partition option, you must specify the values in the Index By Data Partition grid on the Advanced tab of the selected search definition. Oracle recommends that you use this option only for large data volume.

For more information, see [Working With Advanced Settings](#).

This example illustrates the fields and controls on the Build Search Index page after enabling the Index By Data Partition option for non-date field. You can find definitions for the fields and controls later on this page.

Build Search Index

Run Control ID RUN_DP_BU_03 [Report Manager](#) [Process Monitor](#)

*Search Instance PTSF_DEFAULT

*Search Definition EP_GL_JOURNAL

Indexing Method

☒ Index By Data Partition

Language Option

☒ Base Language

☐ All Languages

Index By Data Partition

Field Name BUSINESS_UNIT

Field Value US001,US002

Please Enter comma separated values.

Number of Partitions 3

Run Status Success

[Run](#)

	Run Control ID	Process Instance	Partition Number	Process Run Status	Message Log	Rerun	Error
1	RUN_DP_BU_03_3_1	335851	1	Success	Message Log	Rerun	Error
2	RUN_DP_BU_03_3_2	335852	2	Success	Message Log	Rerun	Error
3	RUN_DP_BU_03_3_3	335853	3	Success	Message Log	Rerun	Error

[Save](#) [Return to Search](#) [Previous in List](#) [Next in List](#) [Notify](#)

Field or Control	Description
Field Name	Select an eligible field from the search definition for data partitioning.
Field Value	Enter one or more values for the selected non-date field to define the data partitions. For multiple entries, separate each value with a comma (for example, US001, US002). This field appears when a non-date field is selected.
Start Date	Specify the start date time of the data to index. This field appears when a Date/Datetime field is selected.
End Date	Specify the end date time of the data to index. This field appears when a Date/Datetime field is selected.
Number of Partitions	Enter the number of partitions you want the search index build process to create.
Run	Click the Run button to start the indexing program.
Run Status	Displays the run status.
Run Control ID	Displays the run control ID used to generate for each partition.
Process Instance	Search index build process creates multiple PTSF_GENFEED Application Engine programs for the specified number of partitions. Displays the process instance for each partition.

Field or Control	Description
Partition Number	Displays the partition number for each partition.
Process Run Status	Displays the status of each process instance.
Message Log	Use the Message Log link to view the progress of the process.
Rerun	Use the Rerun button to run the partitioned process again. This link is activated only in the case of failure.
Error	If the run status displays an error status, use the Error link to view the error message. This link is activated only in the case of failure.

PeopleTools recommends the following points when you partition the application data using the Index By Data Partition option:

- The number of temporary tables is equal to five times the number of parallel processes planned.
For more information, see Application Engine: Understanding Temporary Tables.
- Before using Index By Data Partition, ensure that the maximum concurrent setting is set appropriately.
- Before using Index By Data Partition, ensure that a sufficient number of AESRVS are available.

Automating Incremental Indexing

Search Framework provides an automated way to schedule the incremental indexing, enabling it to process data where real-time indexing might miss a change. For example, when a future effective-dated row becomes current, the RTI trigger will not be activated, but a new effective-date row needs to be processed.

Use the following pages to configure and schedule the incremental indexing:

1. Set up Incremental Indexing
2. Configure Incremental Schedule
3. View Incremental Schedules

Using the Set up Incremental Indexing Page

Use the Set up Incremental Indexing page to configure incremental indexing for a specific search definition that has a date or datetime field and to specify any additional information required for incremental indexing of the search definition.

Access the Set up Incremental Indexing page by selecting **PeopleTools**, and then **Search Framework**, and then **Automated Incremental Indexing**, and then **Set up Incremental Indexing**.

The search page displays search definitions with the source type as query and connected query from the default search instance.

The search page also provides a comprehensive view of the Incremental Active status retrieved from the Configure Incremental Schedule page, enabling you to take the necessary action on a search definition.

Select a search definition to view or modify the Incremental Indexing information.

This example illustrates the fields and controls on the Set up Incremental Indexing page. You can find definitions for the fields and controls later on this page.

Set up Incremental Indexing

Return to Search

Previous In List

Next In List

Search Definition HC_HR_JOB_DATA

Record Details

1 row

*Record (Table) Name ↑↓	Record Description ↑↓	Field Name ↑↓	Audit Field ↑↓
1 LOCATION_TBL	Company Site Locations	EFFDT	

+

-

Save

Field or Control	Description
Record (Table) Name	Select the table where a change in data need to initiate incremental indexing.
Record Description	Displays the description of the selected record.
Field Name	Select the date or datetime field that needs to be monitored to identify the change in data in the table.
Audit Field	Select the date or datetime field that acts as an audit field in the table in case a current effective date data undergoes a change or any other specific use cases where only an audit field update happens. This is an optional field.

Using the Configure Incremental Schedule Page

Use the Configure Incremental Schedule page to activate or deactivate incremental indexing for a specific search definition and to specify any additional information required for scheduling incremental indexing of the search definition.

Access the Configure Incremental Schedule page by selecting **PeopleTools**, and then **Search Framework**, and then **Automated Incremental Indexing**, and then **Configure Incremental Schedule**.

The search page displays search definitions as well as their schedule and last scheduled time status, enabling you to take necessary action on search definitions.

This example illustrates the fields and controls on the Configure Incremental Schedule page. You can find definitions for the fields and controls later on this page.

Configure Incremental Schedule

Return to Search

Next In List

Search Definition

HC_HR_JOB_DATA

Search Instance

PTSF_DEFAULT

Incremental Active

Schedule Time

10:06AM

Time Zone

PST

Run Control ID

DP_001

A new run control with the provided name will be created if it is not existing. If the provided run control matches to an existing incremental schedule, the same will be used for further schedules. Otherwise a new run control with a name suffixed with AUTO would be created.

Last Indexed Time

Data Partition

Indexing By Data Partition

Yes

Number of Partitions

3

Save

Field or Control	Description
Search Definition	Displays the search definition's name.
Search Instance	Displays the search instance's name.
Incremental Active	Enable the Incremental Active button to schedule incremental indexing at the specified time.
Schedule Time	Specify the time for initiating incremental indexing.
Time Zone	Select the preferred execution time zone.
Run Control ID	By default the last run control from a successful indexing is displayed. However, you can provide a run control of your choice. If the given run control doesn't exist, the system automatically creates a new incremental run control.
Last Indexed Time	Displays the date and time when the index was scheduled successfully.
Index By Data Partition	Displays whether the Search Framework partitions the application data using the Index By Data Partition option. This field is populated when data partition run control is available.
Number of Partitions	Displays the number of partitions. This field is populated when data partition indexing is enabled in the search definition.

Using the View Incremental Schedules Page

Use the View Incremental Schedules page to view the data related to incremental indexing. This page provides a comprehensive view of the information retrieved from the Set up Incremental Indexing and Configure Incremental Schedule pages.

Access the View Incremental Schedules page by selecting **PeopleTools**, and then **Search Framework**, and then **Automated Incremental Indexing**, and then **View Incremental Schedules**.

This example illustrates the fields and controls on the View Incremental Schedules page.

View Incremental Schedules							
Search Definitions							
Search Definition	Record (Table) Name	Field Name	Audit Field	Incremental Active	Schedule Time	Time Zone	Last Indexed Time
1 HC_HR_JOB_DATA	LOCATION_TBL	EFFDT		Yes	9:00AM	PST	03/05/25 7:43:18AM

Scheduling Automatic Incremental Indexing

The PTSFINCGENFD Application Engine program periodically monitors the configured search definitions and schedules incremental indexing when data is available for the fields specified on the Set up Incremental Indexing page for a search definition.

Oracle recommends associating a recurrence for PTSFINCGENFD to monitor data availability at regular intervals.

To automate incremental indexing, complete the following steps:

1. Modify the delivered recurrence "Indexing Recurrence", if needed.
2. Navigate to the Schedule Process Request page **PeopleTools**, and then **Process Scheduler**, and then **Schedule Process Request**.
3. Create or use an existing run control ID.
4. Schedule the PTSFINCGENFD Application Engine program using the "Indexing Recurrence" recurrence.

See the *Process Scheduler PeopleBook* for more information on scheduling Application Engine programs.

Configuring Incremental Indexing Using ADS Definition

Oracle delivers an ADS definition to create automated incremental indexing configuration.

For information on using ADS, see Lifecycle Management Guide: Understanding ADS Projects.

ADS Definition for Incremental Indexing

ADS definition for incremental indexing — PTSF INCREMENTAL INDEXING.

PTSF INDEX GROUP

Group	Details
Group Name	Incremental Indexing Group
Group Description	Incremental Indexing Group
Group Member	- PTSF_INC_C_REC.FIELDNAME - PTSF_INC_C_REC.PTSF_INC_ADTFLD - PTSF_INC_C_REC.PTSF_SBO_NAME - PTSF_INC_C_REC.RECNAME
Group Properties	Merge configurations

Tables for PTSF_INCREMENTAL_INDEXING

Table	Description
PTSF_INC_C_REC	Stores incremental indexing configuration details.

Using Direct Transfer

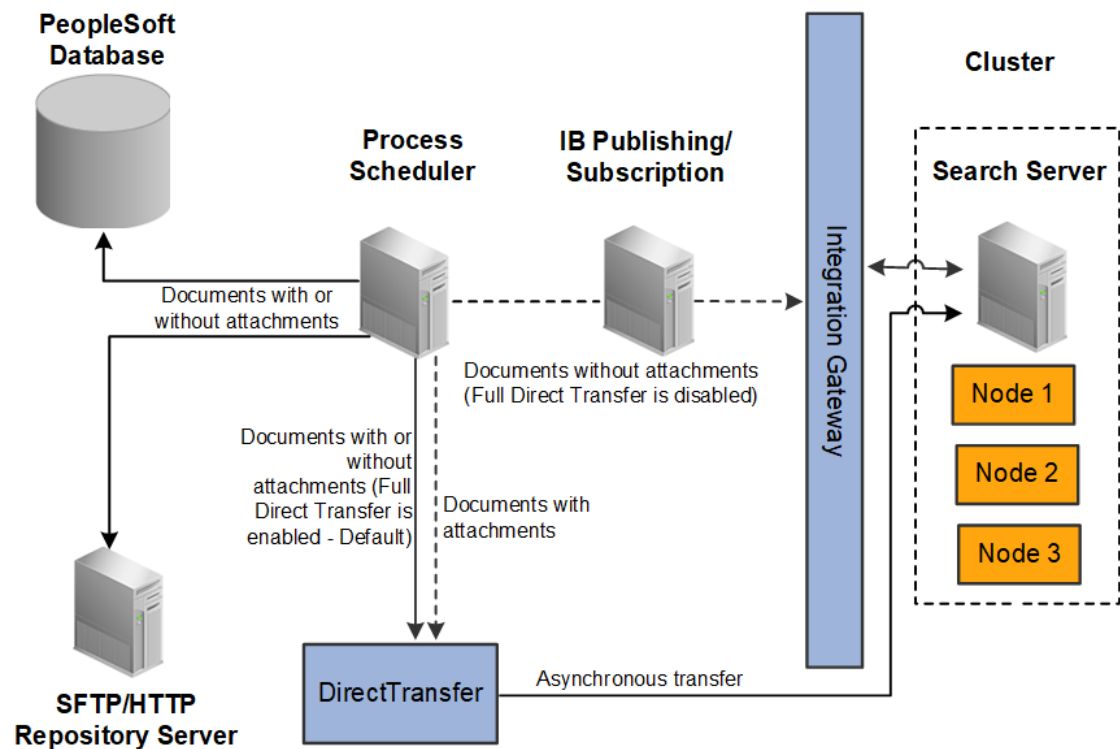
Direct Transfer is a PeopleSoft technology used to transmit search indexing data directly from PeopleSoft batch servers to the search engine. This technology sends the data directly without having the overhead of passing the data through the Integration Broker Gateway and Web server.

Understanding Direct Transfer

PeopleSoft Search Framework implements Direct Transfer technology to transfer search data (search documents with attachments and search documents without attachments) directly to the search engine bypassing the Integration Gateway. This feature is called Full Direct Transfer, which is the default option in PeopleSoft Search Framework. However, PeopleSoft enables you to choose whether you want to use the Full Direct Transfer option or not. If you choose not to use the Full Direct Transfer option, then search documents without attachments will be transmitted through the Integration Gateway but, the search documents with attachments will be transmitted directly to the search engine.

Direct Transfer technology supports search definitions that are based on Connected Query and Query.

The following graphic depicts PeopleSoft downloading search documents from database, attachment repository, and HTTP repository, and then pushing encoded data to the search engine using Direct Transfer. The search engine uses Mapper attachment plug-in to parse attachment contents for indexing.



To use Direct Transfer, you need to:

- Complete the configurations required for Direct Transfer.
- Review the system considerations.
- Review error handling.

Configuration

Direct Transfer requires the following configurations:

- Specify the number of indexing handlers on the Search Options page.
- Specify the maximum attachment error count on the Search Options page.
- Specify whether you want to use the Full Direct Transfer option.

Specifying Number of Indexing Handlers

You use the Search Options page to enter the number of indexing handlers.

The number of indexing handlers determine how many parallel data transfers are done from PeopleSoft to OpenSearch. The default value is 5, which means that during indexing a maximum of 5 handlers are created. This number should be less than the bulk thread queue size on OpenSearch (default value of bulk thread queue size is 50).

For search definitions where an average attachment size is 100 KB and the bulk thread queue size on OpenSearch is 50 (default value), then setting the value for Indexing Handlers to 5 would be optimal in most cases, subject to system considerations.

For indexing search definitions containing large attachments (for example, 10 MB or greater than 10 MB), then the value of Indexing Handlers can be reduced further if there are ingestion issues in the search server.

The optimal value of Indexing Handlers is dependent on the data volume, pattern and system considerations on PeopleSoft and OpenSearch.

Note

The Number of Indexing Handlers option is used for search documents with attachments and also for search documents without attachments (in the case when Full Direct Transfer is enabled). When Full Direct Transfer is not enabled, this property is applicable only for search documents with attachments.

Specifying Max Attachment Error Count

You use the Search Options page to enter a value for Max Attachment Error Count.

Max Attachment Error Count is used to determine the error tolerance of the indexing program. It is used to specify the maximum error transactions permitted during indexing. If during indexing, the number of errors exceeds the specified value, the indexing process will exit after completing the process of sending data that is already available in memory.

See [Error Handling](#).

Specifying Full Direct Transfer

You use the Search Options page to select Full Direct Transfer. The default value is Y.

If you set Full Direct Transfer to Y (yes), then search documents with or without attachments are directly transmitted to the search engine.

If you set Full Direct Transfer to N (no), then search documents without attachments are transmitted through the Integration Gateway while the search documents with attachments are directly transmitted to the search engine.

Related Topics

- [Managing General Search Options](#)
Use the Search Options page to manage global settings for your search configuration.

System Considerations

Review the following system considerations for Direct Transfer:

- Memory usage on PeopleSoft
- Memory usage on OpenSearch

Memory Usage on PeopleSoft

The amount of memory used by Direct Transfer for runtime data storage is dependent on the segment size and number of attachment handlers. For example, for the default segment size of 10MB and 20 attachment handlers, Direct Transfer would utilize an additional 200 MB on the PeopleSoft Batch Server during data send.

Memory Usage on OpenSearch

When Direct Transfer sends data to OpenSearch, review the main memory considerations on OpenSearch. This memory allocation should be configured using the JVM.option configuration file in OpenSearch.

- The incoming data is stored in bulk thread queues on OpenSearch during the ingestion process. The amount of memory used for this purpose is based on the bulk thread queue size.
- The amount of parallel ingestions which can happen on OpenSearch is based on the cores on the system. The number of parallel bulk ingestions is equal to the number of cores.
- During ingestion, for documents containing attachments, OpenSearch uses a large amount of memory for document parsing. An example is parse a large attachment of 10 MB size, the memory required for parsing it is around 100 MB.

Example 10-1 Examples

1. To index a search definition where the average attachment size is 100 KB and OpenSearch server is a 2 core system and memory available for OpenSearch JVM is greater than or equal to 8 GB, then an Attachment Handler value of 20 should suit in most circumstances.
2. To index a search definition where average attachment size is 1 MB and OpenSearch server is a 4 core system and memory available for OpenSearch JVM is greater than or equal to 16 GB, then an Attachment Handler value of 10 should suit in most circumstances.
3. To index a search definition where average attachment size is 100 MB and OpenSearch server is a 4 core system and memory available for OpenSearch JVM is greater than or equal to 16 GB, then an Attachment Handler value of 5 should suit in most circumstances. The `http.max_content_length` setting on the `opensearch.yml` configuration file should also be increased in this scenario. The default value is 100 MB, but for large attachments you may set the value to a higher value, for example, `http.max_content_length=512mb`

Error Handling

To log error messages and to handle errors in Direct Transfer, PeopleSoft Search Framework provides the following:

- On the Search Options page, Search Framework provides the Enable Attachment Trace option to enable the detailed logging of each task on the trace file, which logs messages for search documents with attachments and search without attachments. For Direct Transfer, you should set this property to Y if you want to troubleshoot any errors associated with the transfer of search data from PeopleSoft to the search engine.
For more information, see [Managing General Search Options](#).
- On the Search Options page, the Max Attachment Error Count option is used to determine the error tolerance of the indexing program. For more information, see [Configuration](#).
- On the Build Search Index page, in the Previous schedule details section, an Error link is displayed if an error occurs while indexing (**PeopleTools**, and then **Search Framework**, and then **Search Admin Activity Guide**, and then **Administration**, and then **Schedule Search Index**).
 - Full Direct Transfer is enabled — During indexing, there could be possibilities that certain data transactions may not be successful either due to temporary system situations (for example, the search engine is performing some internal maintenance

operations) or due to data issues. In such cases, Direct Transfer stores the request and response of the transaction that goes into error in an error table, and proceeds with further indexing.

After the indexing process is complete, errors, if any, can be viewed on the Build Index page (Previous schedule details section).

- Full Direct Transfer is disabled — During the indexing of search documents with attachments (which are transmitted directly to the search engine), if any error occurs, an Error link is displayed on the Build Search Index page.

During the indexing of search documents without attachments (which are transmitted through the Integration Gateway), if any error occurs in IB transactions, an Error link may not be displayed on the Build Search Index page. You need to check the Process Monitor whether the PTSF_GENFEED Application Engine program displays **No Success** status. If the status of the PTSF_GENFEED Application Engine program is **No Success**, administrators must review the IB monitor logs for details on the error.

- Based on the type of error, an administrator can use the **Rerun** option to resubmit the transactions if the issue was related to temporary environment problems, or can review the data and correct the data at the source, or can determine whether the data that is causing the error can be omitted for indexing. If the data needs to be corrected at source, then the indexing process should be executed again to get the correct data indexed.

Click the Error link to display the Attachment Transfer Exception Details page.

This example illustrates the fields and controls on the Attachment Transfer Exception Details page. You can find definitions for the fields and controls later on this page.

Attachment Transfer Exception Details

Search Definition QE_ES_ATTACHURL_PC_DB_CQ Rerun

Indexing has failed due to exceptions in the below transactions. Click on Rerun to resubmit the failed transactions

Select	Process Instance	Request	Response
1 ☐	602	QE_ES_ATTACHURL_PC_DB_CQ_1	View Response

☒ Select All ☐ Deselect All

Return

Field or Control	Description
Process Instance	The process instance ID of the PTSF_GENFEED Application Engine program that is causing the exception.
Request	The request sent by the PTSF_GENFEED Application Engine program to the search engine.
Response	The response received by the PTSF_GENFEED Application Engine program from the search engine.

Field or Control	Description
Rerun	Use the Rerun button to resubmit the selected error transactions to the search engine. The progress of the transaction can be monitored using the Process Monitor page on PIA. When a transaction is successful, it is deleted from the error pages. In the case where the maximum exceptions limit is not reached, when you select the Rerun button: - The transaction is directly submitted to the search engine through the PTSF_GENFEED Application Engine program, but without executing the Connected Query program. - The request messages stored in error tables will be sent directly to the search engine. In the case where the maximum exceptions limit is reached, the Rerun button acts as a re-submit of the PTSF_GENFEED Application Engine program. After re-running the PTSF_GENFEED Application Engine program, if the transaction is not successful, the error tables are updated with the latest error message.

Using Direct Transfer with SSL Enabled OpenSearch

For Direct Transfer to work with SSL enabled OpenSearch, the Certification Authority (CA) certificate should be available in the Digital Certificate repository of PeopleSoft. This is to ensure that when the Direct Transfer process is run, the root certificates are obtained from the repository to create a CA certificate bundle and use it for secured communication between the Process Scheduler server and OpenSearch.

To make the CA certificate available in the Digital Certificate repository of PeopleSoft, add the CA certificate of OpenSearch to **PeopleTools**, and then **Security**, and then **Security Objects**, and then **Manage Digital Certificates**.

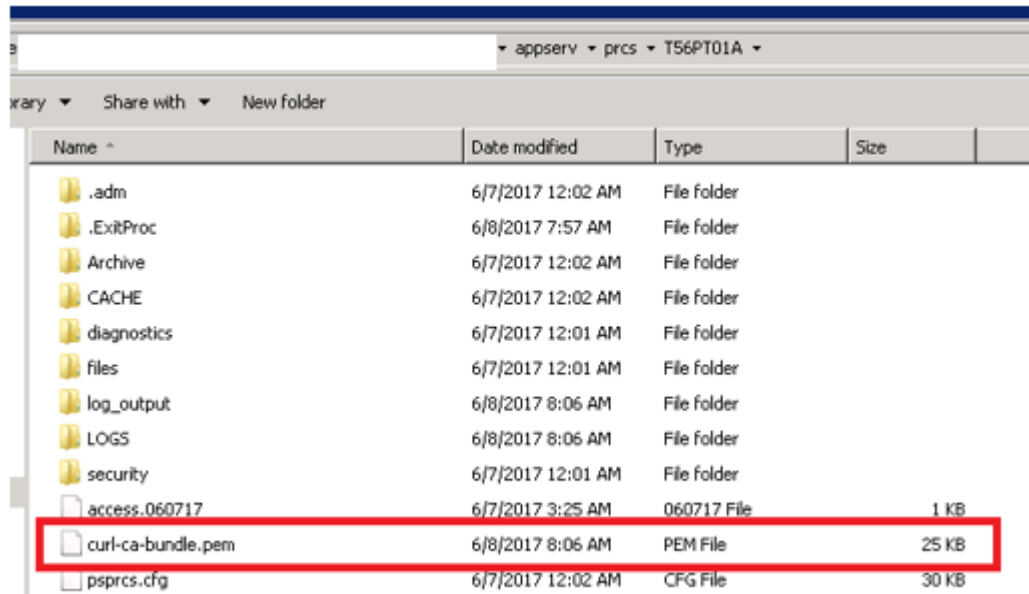
This example illustrates the Digital Certificates page.

Digital Certificates

Digital Certificates					Personalize	Find	First	1-23 of 23	Last
Type	*Alias	*Issuer Alias	Valid to	Links					
Root CA	GTE CyberTrust Global Root	GTE CyberTrust Global Root		Detail					
Root CA	GTE CyberTrust Root	GTE CyberTrust Root		Detail					
Root CA	KeyWitness Root	KeyWitness Root		Detail					
Root CA	Novell RNO207225	Novell RNO207225	06/24/21 1:58:37PM	Detail					
Root CA	Novell eDir	Novell eDir	04/12/19 1:23:29PM	Detail					
Root CA	PeopleTools	PeopleTools		Detail					

When the process starts, the certificate bundle in PEM format is available in the Process Scheduler server folder.

This example illustrates the certificate bundle in PEM format.



Name	Date modified	Type	Size
.adm	6/7/2017 12:02 AM	File folder	
.ExitProc	6/8/2017 7:57 AM	File folder	
Archive	6/7/2017 12:02 AM	File folder	
CACHE	6/7/2017 12:02 AM	File folder	
diagnostics	6/7/2017 12:01 AM	File folder	
files	6/7/2017 12:01 AM	File folder	
log_output	6/8/2017 8:06 AM	File folder	
LOGS	6/8/2017 8:06 AM	File folder	
security	6/7/2017 12:01 AM	File folder	
access.060717	6/7/2017 3:25 AM	060717 File	1 KB
curl-ca-bundle.pem	6/8/2017 8:06 AM	PEM File	25 KB
psprcs.cfg	6/7/2017 12:02 AM	CFG File	30 KB

Real-Time Indexing Using Direct Transfer Technology

Search Framework uses Direct Transfer technology during the indexing process. Search Framework enables applications to perform real-time indexing using the delivered methods of Direct Transfer.

See PeopleCode API Reference: PTDirectTransferObject Class Methods.

A sample code that performs real-time indexing using Direct Transfer:

```
Local JsonBuilder &jb = CreateJsonBuilder();
&jb.StartObject("");
&jb.AddProperty("FIRST_NAME", "MyFirstName");
&jb.AddProperty("LAST_NAME", "MyLastName");
&jb.EndObject("");

Local string &pdoc = &jb.ToString();

Local PTDirectTransferObj &PTDTobj = CreateDirecttransferObject();
&PTDTobj.SetIndex("myprofile");
REM &PTDTobj.SetIndex("vchr_chg_history_e92cmhk2");
&PTDTobj.SetDocId("1");
&PTDTobj.SetMethod("POST");
&PTDTobj.SetBody(&pdoc);

Local string &response = &PTDTobj.SyncTransfer();
```

The response from SyncTransfer can be parsed and acted upon accordingly.

Verifying Domain Status

To verify and set domain status, access the Domain Status page by selecting **PeopleTools**, and then **Search Framework**, and then **Search Admin Activity Guide**, and then **Administration**, and then **Domain Status**.

For more information, see Integration Broker Administration: Working with the Domain Status Page.

Verifying Integration Broker Queue Status

To verify the status of the PTSF_ES_SEND_Q queue, access the Asynchronous Services page by selecting **PeopleTools**, and then **Search Framework**, and then **Search Admin Activity Guide**, and then **Administration**, and then **Asynchronous Services**.

Note

The messages will flow to the PTSF_ES_SEND_Q queue only when the search options configuration for direct transfer is set to *NO*.

See [Handling Common Errors](#) for a description of the queue status.

Managing Search Context

This section provides an overview of managing search context.

Understanding Search Contexts

Use search contexts to define which search groups appear in the search group drop-down Global Search Bar, depending on the context of the user. The context determines what appears in the drop-down relative to where the user is located.

A search group is a search category that you enable for the purpose of setting up search contexts. Currently, search groups can belong to the Home Page search context.

Note

From PeopleTools 8.55, only the Home Page search context is available. That is, the Portal Node and Work Center search contexts are *not* available.

For the Home Page search context, a default search group can be selected. It is not required to have a default search group for the search context.

Defining Search Contexts

Access the Define Search Context page by selecting **PeopleTools**, and then **Search Framework**, and then **Search Admin Activity Guide**, and then **Administration**, and then **Define Search Context** and select the Home Page search context.

This example illustrates the fields and controls on the Define Search Context page. You can find definitions for the fields and controls later on this page.

Define Search Context

Add search groups which can be displayed for this context.

Context Type Home Page

Search Context				Personalize Find View All  	First  1 of 1  Last
Default	Sequence	*Search Category Name	Description		
1 	1	PTPORTALREGISTRY	 Navigator		

Use the plus and minus buttons to add and remove the search categories to and from the search context.

Field or Control	Description
Default	Select the category that should be the default. Only PTPORTALREGISTRY related (local and remote search groups) search categories can be chosen as default. All other search categories are disabled. Only one default search category can be selected for a search context. Note: If no categories are marked as Default, then Menu is the default. If Menu is not available to be chosen, then All is the default. Note: Global Search allows searching by All allowable search categories. 'All' is an option that is automatically added to Global Search if in use. This means that users can search across all groups to which they have access. The 'All' category may <i>not</i> be removed.
Sequence	Specify a numerical sequence to define the order in which the search categories will appear in the Global Search Bar. Note: This sequence is considered only when the Use Search Context Sequence property in search options is set to Y.
Search Category Name	Select the search category to include for this search context.

Viewing Search Contexts

To view your defined search contexts, access the View Search Contexts page by selecting **PeopleTools**, and then **Search Framework**, and then **Search Admin Activity Guide**, and then **Administration**, and then **View Search Contexts**.

This example illustrates the fields and controls on the View Search Context page. You can find definitions for the fields and controls later on this page.

View Search Context

List of all the search contexts defined for this system

▼ Filter Contexts

Context Type

Node Name\Workcenter ID

Clear

Search Contexts

Context Type

Home Page

Edit Context

Default	Sequence	Search Category Name	Description
☐	1	PTPORTALREGISTRY	Navigator

Filter Contexts

Use the Filter Context controls to customize and narrow the contexts displayed.

Field or Control	Description
Context Type	Select the context type you wish to view. Home Page is the only available context type.
Node Name\Workcenter ID	Enter a specific node name.
Clear	Click to clear the previous filter criteria.

Search Contexts

The Search Contexts section displays the search contexts that meet the criteria specified in the Filter Contexts section.

Field or Control	Description
Edit Context	Click to modify the search context definition. The link opens the Define Search Context page with the selected search context open.

Viewing Node in Network

Use the Node Network page to view and configure details about PeopleSoft nodes in the integration network.

For more information, see Integration Broker Administration: Viewing Node Network Status.

Importing Remote Search Groups

You can share search groups between databases to enable seamless navigation between systems. However, the nodes and the search groups need to be known to all systems involved. The imported search groups are treated as local search groups, and need to be modified as such. For example, imported groups need to be included in the search contexts to become available.

When you import search groups, you import them from a remote node, as defined in your Integration Broker configuration. When importing search groups, keep the following items in mind:

- Both the local and remote systems need to point to the same search instance. That is, both systems need to have the same search instance defined on the Search Instance Properties page.
- Both systems need to have unique Default Local Node names.
- Both systems need to have a unique database name.
- The remote node needs to be in the IB Network of the local system.
- The remote system needs to trust the local system. That is, single sign-in must be set up between the two systems, and they must share common PeopleSoft user profiles. If you need users to be able to search both indexes, the users must exist and be authorized in both systems.
- The remote node Portal URI Text and Content URI Text values need to be specified on the Portal tab of the node definition.

To import search groups from other systems, access the Remote Search Groups page by selecting **PeopleTools**, and then **Search Framework**, and then **Search Admin Activity Guide**, and then **Administration**, and then **Remote Search Groups**.

Note

Importing remote search groups retrieves all the search groups defined in that content system along with all related search categories, associated search definitions, and the list of faceted attributes.

Be careful not to import all search groups unless you are actually using them. Turning on all search groups degrades performance.

This example illustrates the fields and controls on the Remote Search Groups page. You can find definitions for the fields and controls later on this page.

Remote Search Groups

Import new search groups from IB in network remote nodes or remove existing search groups

Import from remote node			
Content Provider		Import	
Imported Search Groups			
Personalize Find View All 		First 1 of 1 Last	
Search Category Name	Description	Message Node Name	Delete
1			Delete

Field or Control

Description

Content Provider

Select the remote node defined in your system from which you want to import search groups. Content providers must be defined as nodes known to your system using Integration Broker.

Field or Control	Description
Import	Click to invoke the import process. This will import all search groups from the selected node.
Delete	Click to remove any unnecessary or obsolete search groups from your system.

When working with remote search groups, consider these items:

- All the imported search groups need to be registered in the appropriate search context to appear in the Global Search Bar.
- When a user signs on to the PeopleSoft application, the host system sends requests to get the remote search category details. The category details received from the remote system are cached to avoid repeated calls to the remote system. If a content system goes down or if there have been any changes in the content system, it will be reflected in the host system only after a user signs on for a new session, not during the current session.
- For the remote search categories, the security of what needs to be displayed is controlled by the content system. If the user does not have access to the groups on the content system, the user will not be able access them in the Global Search Bar in the host system. If the content system is down, or the user does not exist in the content system, or the user does not have access to category details, the system logs an error into application server log and does not display the categories to the user.

Related Topics

- Integration Broker Administration: Understanding Nodes
- Portal Technology: Setting Portal Node Characteristics

Creating the Attachment URL ID List

Access the Attachment URL ID List page by selecting **PeopleTools**, and then **Search Framework**, and then **Search Admin Activity Guide**, and then **Administration**, and then **Attachment URL ID List**.

Use the Attachment URL ID List page to define a list of URL IDs to be used specifically for attachments within the PeopleSoft Search Framework. URL definitions are created using the URL Maintenance page (**PeopleTools**, and then **Utilities**, and then **Administration**, and then **Maintain URLs**), and using the Attachment URL ID List page you identify a subset of these URL definitions to be recognized by the PeopleSoft Search Framework.

This example illustrates the fields and controls on the Attachment URL IDs page. You can find definitions for the fields and controls later on this page.

Attachment URLIDs

URLID List used by Search Framework Attachments

URLID List		Personalize	Find	View All			First	1-6 of 19	Last
	*URL Identifier	Description							
1	PSSESATT_1	SES URL from File Attachments							
2	PSSESATT_2	SES URL from File Attachments							
3	PSSESATT_3	SES URL from File Attachments							
4	QE_SES_ATTACH_S	QE_SES_ATTACH_STATIC_FTP							
5	QE_SES_ATTACH_S	QE_SES_ATTACH_STATIC_PATH_FTP							
6	QE_SES_DYN1	QE_SESDYN1							

Field or Control	Description
URL ID List	This grid contains the subset of previously defined URL definitions that you want the PeopleSoft Search Framework to recognize as attachment storage locations.
URL Identifier	From the drop-down list, select the URL Identifier to add to the URL ID list. The drop-down list prompts against the list of URLs defined on the URL Maintenance page.

Note

If you need to use multiple user credentials for a single FTP server, create separate URLID's for each user. The URL definition allows only one user credential for each URLID.

Password credentials must be encrypted on the URL definition.

Related Topics

- System and Server Administration: URL Maintenance

Implementing Report Repository Search

The Search Framework enables you to index the contents (files and generated reports) of your report repository, enabling end users to find reports quickly using free text search.

PeopleTools delivers the Reports (PTSEARCHREPORTS) search definition and search category. To index your report repository, deploy PTSEARCHREPORTS search definition and search category and run the schedule index process (PTSF_GENFEED) for that search

definition. The underlying connected query for the search definition gathers the required data from the Process Scheduler tables for report indexing and access.

Note

PeopleSoft delivers the PTSEARCHREPORTS index with all report types undefined. To define which reports to be included in the Report Repository Search, navigate to PeopleTools, Process Scheduler, Process Scheduler Settings and choose the Search Configuration tab.

End users can search the Reports index from:

- Global Search
- Component Search page
- Search Reports page (Reporting Tools > Search Reports)

The following example provides a sample search using the Search Reports page. Descriptions of the controls follow the example.

Search Reports

Filter by	Search Results
Created By VP1 (3)	abcd Last Updated Date: 2014-05-23 00:57:51 File Name: XRFMENU-10545.pdf
Process Type Application Engine (1) SQR Report (1) nVision-Report (1)	Detailed Financial Statement Last Updated Date: 2014-05-22 10:50:20 File Name: psnvs_5908.nvt
Folder Name GENERAL (3)	Cross Reference Window Listing Last Updated Date: 2014-05-20 04:55:41 File Name: XRFWIN_10528.PDF
Created On 2014 (3)	

The default facets by which users can filter the reports are:

- Created By: Filters results by the user ID submitting the report.
- Process Type: Filters results by process type (SQR, Application Engine, and so on).
- Folder Name: Filters results by the folder name where the report resides in the report repository.
- Created On: Filters results by date.

Related Topics

- [Administering Search Definitions and Search Categories](#)
This section contains an overview of search definitions and search categories.

- [Working with Search Indexes](#)
This topic provides an overview of index building process and discusses how to build an index.
- Process Scheduler: Using Search Reports

Working with Search Framework Definitions During Upgrades

These Search Framework definitions are managed objects, meaning they can be upgraded, added to projects, compared, copied, and so on:

- search attributes
- search definitions
- search categories
- search contexts

Boosting Score of Search Results

When end users search for content, the listing of search results is based on the score of a match. A match with the highest score is displayed at the top of the search-results list. PeopleSoft Search Framework allows application designers to programmatically boost the score of a result so that the most relevant results are displayed.

Note

Score boosting cannot be configured on Global and Component searches; only custom searches can be configured with score boosting.

PeopleSoft Search Framework uses the SearchFilterGenerator API to generate custom boosting queries where you provide the boost factor for a filter. The search engine supports score boosting on an individual filter level or on a group of filters and it supports boosting on any filters supported by the SearchFilterGenerator API.

Note

PeopleSoft Search Framework restricts the use of multiple score functions such as ADD, MIN, MAX, etc. within a single query. Only one operation is allowed in a single request.

The following code sample generates a custom score based on a filter on product for values of television, TV, monitor, or display with a boost factor.

```
If &fg.MatchAnyReturnTrue() Then
    &fg.ContainsWord("PRODUCT" ,"Television");
    &fg.BoostFilterScore(0.03);
    &fg.ContainsWord("PRODUCT" ,"TV");
    &fg.BoostFilterScore(0.03);
    &fg.ContainsWord("PRODUCT" ," Monitor");
    &fg.BoostFilterScore(0.02);
```

```
&fg.ContainsWord("PRODUCT" , "Display");  
&fg.EndMatchAny();  
&fg.setBoostModeSum();  
End-If;
```

For code examples of custom score boosting, see PeopleCode API Reference: Search Filter Generator Examples.

Sample Custom Queries for Score Boosting

Applying a single filter:

```
If &fg.MatchAllReturnTrue() Then  
    &fg.ContainsWord("DEPTNAME", "support");  
    &fg.BoostFilterScore(0.02);  
    &fg.EndMatchAll();  
End-If;
```

Joining filters with logical operators:

```
If &fg.MatchAllReturnTrue() Then  
    &fg.ContainsWord("DEPTNAME", "support");  
    &fg.BoostFilterScore(0.02);  
    &fg.ContainsWord("QE_STATUS", "open");  
    &fg.BoostFilterScore(0.03);  
    &fg.EndMatchAll();  
End-If;
```

Applying individual scores in a function such as ADD, AVG, etc. to get overall score on the document based on filter matches:

```
If &fg.MatchAnyReturnTrue() Then  
    &fg.ContainsWord("DEPTNAME", "support");  
    &fg.BoostFilterScore(0.02);  
    &fg.ContainsWord("QE_STATUS", "open");  
    &fg.BoostFilterScore(0.03);  
    &fg.EndMatchAny();  
    &fg.setBoostModeSum();  
End-If;
```

Using wild cards (use * and ? for multi character and single character match respectively):

```
If &fg.MatchAllReturnTrue() Then  
    &fg.ContainsWord("MESSAGE_TEXT", "l*g");  
    &fg.BoostFilterScore(0.01);  
    &fg.ContainsWord("MESSAGE_TEXT", "b??ght");  
    &fg.BoostFilterScore(0.02);  
    &fg.EndMatchAll();  
End-If;
```


Using stemming (add '\$' in front of the word to consider it for stemming):

```
If &fg.MatchAllReturnTrue() Then
    &fg.ContainsWord("MESSAGE_TEXT", "$wanted");
    &fg.BoostFilterScore(0.03);
    &fg.EndMatchAll();
End-If;
```

Using score boosting without specifying a field:

```
If &fg.MatchAnyReturnTrue() Then
    &fg.ContainsWord("", "long");
    &fg.BoostFilterScore(0.02);
    &fg.EndMatchAny();
End-If;
```

Using Fuzzy search (use ~ at the end of the word to treat it as fuzzy search request):

```
If &fg.MatchAnyReturnTrue() Then
    &fg.ContainsWord("MESSAGE_TEXT", "speeks~");
    &fg.BoostFilterScore(0.02);
    &fg.EndMatchAny();
End-If;
```

Related Topics

- PeopleCode API Reference: SearchFilterGenerator Class Methods

Testing Score Boosting

The Search Test Page allows you to check the score boosting feature.

See [Using the Search Test Page](#).

Administering Real-Time Indexing

Understanding Real-Time Indexing

PeopleSoft Search Framework uses data that is indexed in the search engine for search and analytics, so it is recommended that the data is indexed in real time to provide current search and analytics. This would eliminate stale data in the search engine indexes and ensure that discrepancies do not exist between the data in the PeopleSoft database and the indexed data in the search engine.

Any search definition with the source type of query, connected query, and activity guide can be configured for real-time indexing. Refer to the PeopleSoft Application Fundamentals documentation *<for your product line>* for a list of delivered search definitions for which real-time indexing can be configured.

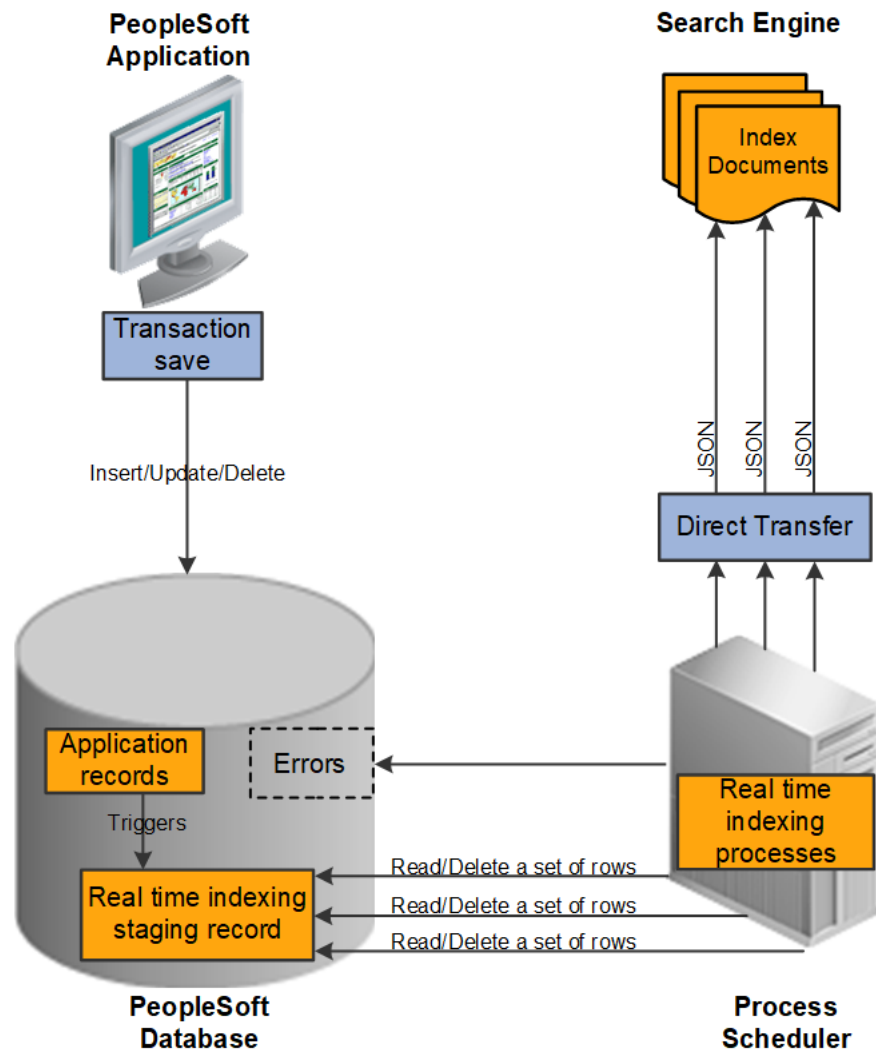
Understanding Set-Based Processing in Real-Time Indexing

Set-based processing refers to processing groups, or sets of rows, at one time rather than processing each row individually.

The real-time indexing process ensures that data is updated on the search server as soon as an application transaction is saved. Based on the volume of data under processing in the real-time indexing queue, the transaction update may appear to be real time or near real time.

Search Framework implements set based processing in real-time indexing as shown in the following diagram.

The following diagram illustrates the process flow of the real-time indexing process.



Real-time indexing uses database triggers as the initializing point for the communication to the search server. As the data is inserted, updated, or deleted, the database trigger associated with the application record inserts a row in the real-time indexing staging table. The staging table acts as an interim data holder by storing the keys of the transaction.

Note

When batch processing is enabled for a search definition, updated data is not pushed to the real-time indexing staging table for the search definition. For more information, see [Turning Off Real-Time Indexing During Batch Processing](#).

A dedicated Process Scheduler process for real-time indexing polls the staging table at regular intervals for any data to process. You can configure the number of processes in the Process Scheduler configuration properties file. By default, only one process is initiated. You may scale up the number of processes by changing the maximum number of instances.

Real-time indexing processes the transactions stored in the staging table as a set. The size of the set is a configurable parameter in the Search Options page, which can be specified as per

the available resources in the Process Scheduler server. A set can contain just one transaction or it can contain the maximum number of transactions as specified in the Real Time Indexing Set Size property based on the available data at any point in time.

Real-time indexing again processes each set for a specific search definition and begins the data retrieval process for each search definition. After the data is collected and formatted to a JSON structure, it is transferred to the search server using Direct Transfer.

Note

When an application batch program updates a large volume of data in an insert or update action, you can expect delay in updating the data to the search server due to the relatively large volume of data as compared to the online transactions with low volume. Therefore, PeopleSoft recommends that you use the real-time indexing batch switch for search definitions with batch programs having large volume indexing.

In most of the search definitions enabled for real-time indexing, you may not need to schedule incremental indexing. However, indexes that have data with effective date changes may require the incremental indexing schedules for the actual data synchronization to take place. A change on the effective dated rows does not initiate a trigger, therefore such search definitions should be indexed using the existing indexing methods. While real-time indexing ensures data synchronization based on transaction updates, incremental indexing updates the indexed data (from prior indexing schedules) to the current date.

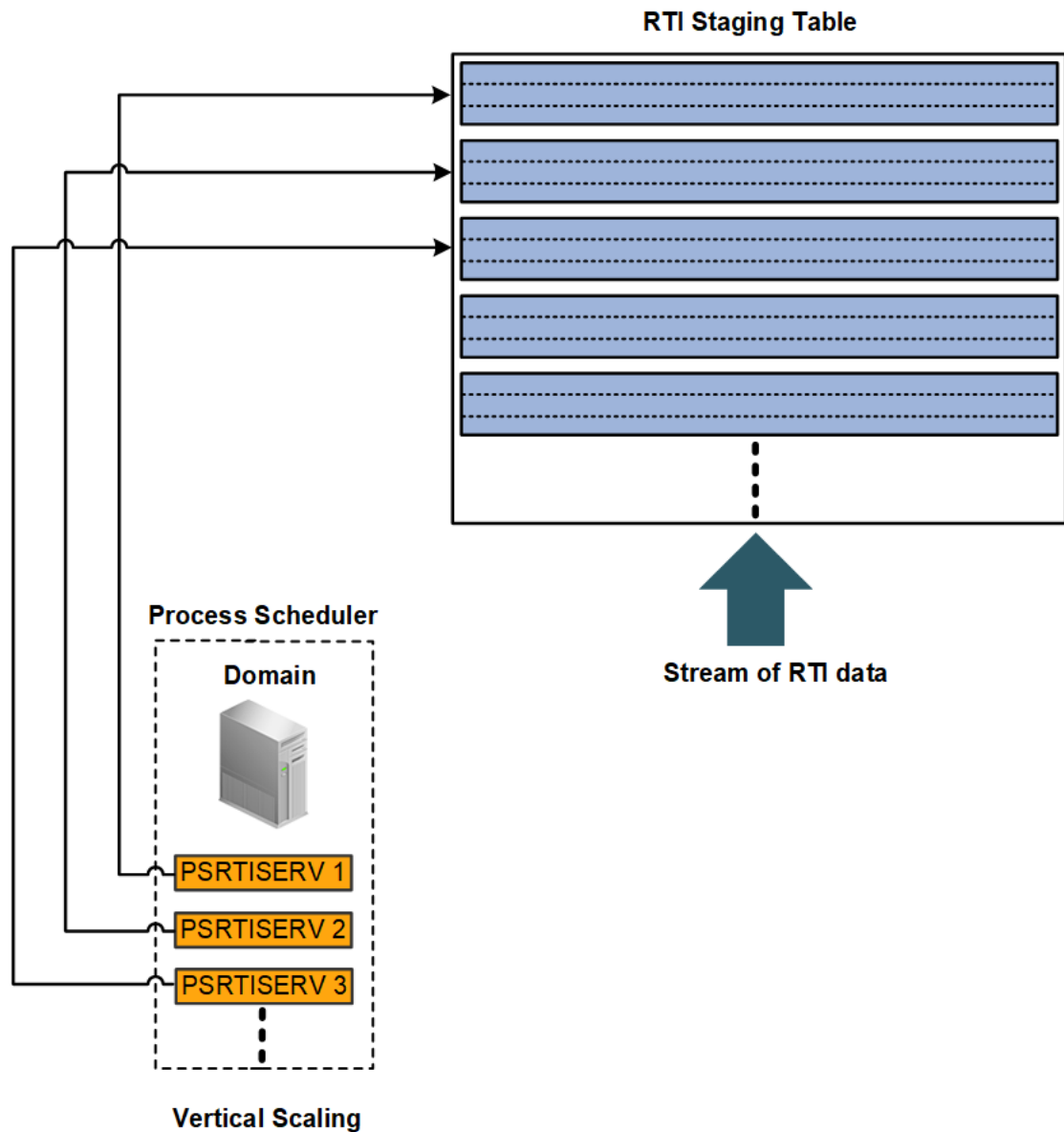
Note

You should periodically run the AE maintenance program (PTRTI_TRUNC) of real-time indexing to ensure that the real-time indexing staging tables are de-fragmented after running large volume batch update for better performance. For a description of the AE maintenance program, see [Using an Application Engine Maintenance Program](#).

Vertical Scaling

Vertical scaling capability in real-time indexing allows you to effectively process search index data updates during high-volume scenarios.

The following diagram illustrates the process flow of the vertical scaling process.



You can enable vertical scaling processing by vertically “scaling up” the number of RTI server processes within a single process scheduler domain.

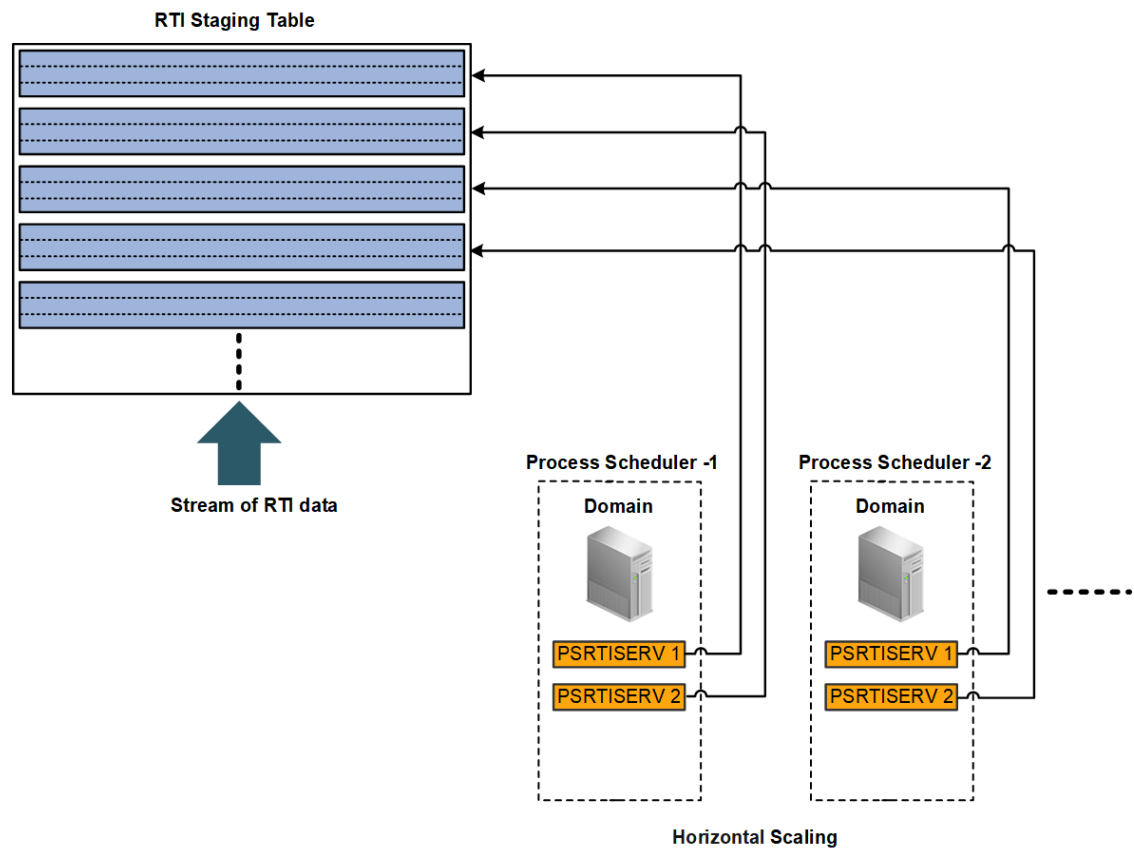
Vertical scaling is dependent on the available resources in the system, like memory and CPU. Vertical scaling needs to share the same available resources within the server.

Horizontal Scaling

PeopleSoft Search Framework introduces horizontal scaling for real-time indexing to optimize high-volume data for faster and more efficient processing.

Horizontal scaling enhances parallel processing by adding more domains to an existing configuration and distributing the data and workload among them.

The following diagram illustrates the process flow of the horizontal scaling process.



You can also enable horizontal processing by horizontally “scaling out” the number of RTI server processes across multiple process scheduler servers.

Configuring Real-Time Indexing

Any search definition with the source type of query, connected query, and activity guide can be configured for real-time indexing.

Search Framework supports real-time indexing through SQL triggers and uses set based processing.

! Important

Oracle does *not* deliver search definitions enabled for real-time indexing automatically. Therefore, you should enable search definitions for real-time indexing based on your business requirements. In addition, some search definitions need to be certified before being turned on. See the Application Fundamentals Online Help <for your product> for more information.

Oracle delivers two search definitions, PTSF_RECENTMENU and PTSF_RECENT_KW, for providing suggestions in search that are configured for real-time indexing, but you have to enable real-time indexing for these two search definitions.

See [Working with Suggestions Search](#).

Prerequisites for Real-Time Indexing

Before you can begin configuring real-time indexing for a search definition, you should configure the following elements or verify that these elements are set correctly:

- Set the Real Time Indexing property in Quick Configure Menu.
- Configure PSRTISRV server process.
- Create an application class for any preprocessing or post processing.

Application class may be provided by PeopleSoft for any delivered indexes.

Note

Real-time indexing supports a maximum of 16 keys per trigger record. If a trigger record contains more than 16 keys, use the **Record Keys** link on the Configure Real-Time Indexing page to select up to 16 keys for indexing.

Setting the Real Time Indexing Parameter in PSADMIN Quick Configure Menu

You should set the Real Time Indexing parameter on the Process Scheduler domain.

To set the Real Time Indexing parameter:

1. Run PSADMIN and choose the Process Scheduler domain.
2. Select 4) Configure this domain.
To configure the domain, the domain needs to be shut down.
3. Enter y to the question: Do you want to continue (y/n).
4. Toggle 6) Real Time Indexing to set it to Yes.
5. Select 7) Load config as shown.
6. Restart the domain.

Configuring the PSRTISRV Server Process

The real-time indexing server process, PSRTISRV, starts when the Process Scheduler domain is booted up. The number of RTI server processes can be configured in the Process Scheduler section of the configuration file (psprcs.cfg). The default is set to 1 instance.

See Process Scheduler: PSRTISRV Section

You should configure the following RTI server process parameters on the Search Options page (select **PeopleTools**, and then **Search Framework**, and then **Search Admin Activity Guide**, from the left panel choose Administration, and then choose Search Options):

- Index Refresh Interval
- Heartbeat Interval
- Real Time Indexing Set Size
- Real Time Indexing Threshold

For description of these parameters, see [Managing General Search Options](#).

Creating an Application Class

For full or incremental indexing of a search definition, any preprocessing is performed by an Application Engine program. In the real-time indexing process, you should define an application class to perform preprocessing and post processing. The application class should extend the PTRTIPKG:PTRTI application class. The PTRTI class contains the Process and PostProcess methods, and you should extend these methods with your application class to perform preprocessing and post processing tasks respectively.

See PeopleCode API Reference: PTRTI Class.

Steps to Enable Real-Time Indexing for a Search Definition

To ensure that the real-time indexing process runs smoothly, PeopleSoft suggests the following sequence of steps.

1. On the Configure Real Time Indexing page,
 - a. Select the Enable Real Time Indexing check box.
 - b. Verify that the metadata is populated correctly and ensure that you specify the required trigger records.
 - c. Save the real-time indexing configuration.
 - d. Create the trigger.
2. Run incremental index for the search index for data synchronization. Perform this step to index records that were added before real-time indexing was initialized.

The selected search definition is now configured for real-time indexing. When data is inserted, modified, or deleted in the database for the search index, a SQL trigger runs to initiate real-time indexing of data in the search engine.

Alternatively, you can enable or disable Real-Time Indexing (RTI) and manage SQL trigger script execution using Application Configuration Management (ACM) RTI plug-in. For more information and detailed configuration steps, refer to the section Automated Configuration Management: Configuring Properties for RTI.

Note

Search definitions with queries using set operators like UNION, INTERSECTION etc. are not supported for real-time indexing. Real-time indexing requires equivalent queries without set operators.

Using the Configure Real Time Indexing Page

Use the Configure Real Time Indexing page to enable real-time indexing for a specific search definition and to specify any additional information required for real-time indexing of the search definition.

Access the Configure Real Time Indexing page by selecting **PeopleTools**, and then **Search Framework**, and then **Real Time Indexing**, and then **Configure Real Time Indexing**.

The search page displays search definitions with the source type as query, connected query, and activity guide from the default search instance. The search page also provides a comprehensive view of the deploy status retrieved from the Deploy Search Definition page,

and the real-time indexing configuration status of the search definitions, enabling you to take the necessary action on a search definition.

Select a search definition to display the real-time indexing information. The search definition metadata is imported including security and attachment configurations.

This example illustrates the fields and controls on the Configure Real Time Indexing page. You can find definitions for the fields and controls later on this page.

Configure Real Time Indexing

Return to Search
Next In List →

Index Name **EP_EX_REPORT**
☒ Enable Real Time Indexing
☐ Configure Batch
[Reload](#)
[Trigger SQL](#)

Save

Data Source

☒ Application Class
☒ Query/Connected Query

Data Generator Application Class

Package Name
Path
Class ID
Process ☐
Post Process ☒

General

Title

%MSGCAT:DESCR:18055:16% - %QRYFLD:F.NAME% | %QRYFLD:RLR:A.SHEET_ID% / %QRYFLD:A.LINE_NBR% | %QRYFLD:RLR:D.DESCR% - %QRYFLD:RLR:A.DESCR40%

Summary

%MSGCAT:DESCR:18037:202%: %QRYFLD:A.TRANS_DT% | %MSGCAT:DESCR:10504:103%: %QRYFLD:RLR:E.XLATLONGNAME% | %MSGCAT:DESCR:18036:335%: %QRYFLD:A.MONETARY_AMOUNT% | %QRYFLD:A.CURRENCY_CD% | %MSGCAT:DESCR:18036:4622%: %QRYFLD:A.OPRID%

URL

'psp/EMPLOYEE/ERP/c/ADMINISTER_EXPENSE_FUNCTIONS.EX_SES_ER.GBL?Page=EX_SES_RA_TRF&Action=U&SHEET_ID=%QRYFLD:RLR:A.SHEET_ID%&LINE_NBR=%QRYFLD:A.LINE_NBR%'

Last Update DateTime

A.SES_LAST_DTTM

Trigger Records

Record
☐ Temp Table?
Transaction Record
[Record Keys](#)

+
-

Search Attributes

Search Attribute ↕	Query ↕	Record Name ↕	Field Name ↕	Source Field ↕	Expression ↕
SHEET_ID	EX_SRCH_BASE	EX_SES_BASE_VW	SHEET_ID	A.SHEET_ID	
BUSINESS_UNIT_GL_BUSINESS_UNIT	EX_SRCH_BASE	EX_SES_BASE_VW	BUSINESS_UNIT_GL	A.BUSINESS_UNIT_GL	
SHEET_NAME	EX_SRCH_BASE	EX_SES_BASE_VW	SHEET_NAME	A.SHEET_NAME	
SHEET_STATUS	EX_SRCH_BASE	EX_SES_BASE_VW	SHEET_STATUS	A.SHEET_STATUS	

Field or Control	Description
Enable Real Time Indexing	Select the check box to enable real-time indexing for the search definition.

Field or Control	Description
Configure Batch	Select the check box to configure batch programs, with a specific Process Type and Process Name, from an available list of batch programs. See Turning Off Real-Time Indexing During Batch Processing.
Trigger SQL	After reviewing or modifying the search definition, you should save the search index. The Trigger SQL link appears only when you select Save on the page. Then, you should create a trigger. A trigger record is generated at runtime. Contact your database administrator to implement triggers on the database. Note: PeopleSoft RTI trigger names have the prefix SFA and suffix TR. For example, SFA_PT_PORTAL_MRU_TR. Any of the following ways can be used to create a trigger: • Select the Trigger SQL link to download the .sql files for the supported database platforms. Run the downloaded trigger SQL in a SQL tool to create triggers. • Open the trigger record in Application Designer, and build the record using the Create Trigger option. • Run the Datamover command: CREATE_TRIGGER <recordname>, where recordname is the trigger record. This field is not available for activity guide search definitions. For more information on trigger records, see the section on Trigger Records later in this topic.
Reload	The Reload link appears only when you select Save on the page. If a search definition is updated after configuring it for real-time indexing, you should use the Reload link to import the updates to real-time indexing. Note: After completing the reload action, ensure that you save the real-time indexing configuration, and then restart the Process Scheduler domain. Warning! The reload operation may clear the existing configurations for application class and trigger records. You may have to redo these configurations after clicking the Reload link.

Data Source

Field or Control	Description
Query/Connected Query or Activity Guide	The system automatically selects Query/Connected Query or Activity Guide as data source for those search definitions that are based on query, connected query, and activity guide.
Application Class	The system automatically selects Query/Connected Query or Activity Guide and Application Class as data sources for those search definitions that contain preprocessing or post processing Application Engine program. When both Query/Connected Query or Activity Guide and Application Class are auto populated as data sources, the real-time indexing process runs the application class method first and then runs SQL query. If query uses a temporary table, the application class method should insert the data to the temporary table. You can choose to use only the application class as the data source rather than Query/Connected Query or Activity Guide. In this case, the application class methods perform the necessary preprocessing or post processing and also set the values for all search attributes of each search document to index. The real-time indexing process then creates the JSON document and uses the Direct Transfer technology to index the data. See PeopleCode API Reference: PTRTI Class.

Data Generator Application Class

The Data Generator Application Class section is displayed when application class is selected as the data source.

Field or Control	Description
Package Name	Specifies the root package where the application class is created. You should ensure that the extended application class exists in the database.
Path	Species the path, represented by a colon (:).
Class ID	Choose the relevant application class.
Process	Set the Process option to Yes if you want to perform any validation or preprocessing and to defer or discard processing. When you set this option to Yes, you should extend the Process method of the delivered application package PTRTIPKG:PTRTI. PeopleCode API Reference: PTRTI Class Methods

Field or Control	Description
Post Process	Set the Post Process option to Yes if you want to perform any validation or post processing. When you set this option to Yes, you should extend the PostProcess method of the delivered application package PTRTIPKG:PTRTI. This field is not available for activity guide search definitions. PeopleCode API Reference: PTRTI Class Methods

General

Search definition metadata is imported and displayed in the Title, Summary, URL, and Last Update Date Time fields.

You cannot edit these fields.

Trigger Records

A trigger record is necessary for real-time indexing. Therefore, you must ensure that the Record field contains a trigger record. When a search definition is based on Query or Connected Query, the system checks the query to try and determine the best trigger record and pre-populates the value for you.

The keys of the trigger record (transaction record) should exist in the primary record of the parent query. During the initial configuration, the trigger records are the suggestions based on the parent query, which you can modify according to your needs. You should add a trigger record only if no trigger record is given.

Optionally, you can add more trigger records but doing so will affect the performance. Also, keeping triggers on child records may cause undesired data insertions to the real-time indexing staging table, which may increase the processing time.

Note

Trigger records are pre-populated for already configured search definitions, and it's recommended not to change these trigger records.

Trigger Records is not available for activity guide search definitions.

Field or Control	Description
Record	The Record field is pre populated based on the parent record used in Query/Connected Query of the search definition where the Last Modified Date Time is configured. If it is a view, the first record used in that view is auto selected as transaction record to create a trigger. However, you can change it to any other record in that view. The real-time indexing process recognizes a transaction only when the trigger record inserts a row for the transaction. Hence, the trigger record should be decided based on this condition. Adding multiple trigger records can cause the same data to be processed multiple times to the search engine.
Record Keys	Select the Record Keys link to select the key fields that the system uses for RTI trigger SQL generation for the trigger record. For more information about selecting record keys, see Selecting Record Keys section below.
Temp Table	Temp Table check box is displayed where there is an associated application class with a search definition. Select the check box and enter the transaction record associated with the Temp Table. The Temp Table is expected to get modified or populated by using the application class.
Transaction Record	Transaction Record can be associated with a temporary table if you select the Temp Table check box. It can also appear when the record field is a view.

Selecting Record Keys

Use the Record Keys page to select a subset of key fields from the trigger record's complete key set. If the trigger record includes keys from a subrecord, those keys are also available for selection.

RTI supports a maximum of 16 keys for each trigger record. If a trigger record contains more than 16 keys, select 16 or fewer keys. The selected keys are used when you download the trigger SQL from the Configure Real Time Indexing page or create the trigger from Application Designer.

If the same trigger record is used by different search definitions, each search definition can use a different key selection for that record.

If you do not select any keys, the system uses the default trigger-key behavior.

This example illustrates the fields and controls on the Record Keys page, where you select the key fields to use for RTI trigger SQL generation.

Record Keys

2 rows

Key Name

1

LINE_NBR

2

SHEET_ID

OK

Attachments

If a search definition contains attachments, the Include Attachments check box is displayed.

Field or Control	Description
Include Attachments	Use this check box to either include attachments or exclude attachments from real-time indexing. If a search definition contains attachments, it is ideal to include attachments in real-time indexing. However, if you observe that attachments are causing delay in real-time indexing, you can choose to exclude attachments. In this case, you can use incremental indexing because in incremental indexing attachments are also indexed. If an index does not contain attachments, the Include Attachments check box is not displayed.

Search Attributes

The Search Attributes section displays metadata imported from the search definition, and it cannot be edited here.

Application developers can use this mapping from the search definition page to know what attributes should be loaded in the application class.

Turning Off Real-Time Indexing During Batch Processing

While processing high volume batch updates for search definitions, real-time indexing can cause a sudden increase in the number of entries to process in the real-time indexing staging table. This can, in turn, cause the database table fragmentation to increase and eventually slow down the performance. Therefore, for large volume batch updates, it is recommended that real-time indexing be temporarily suspended and changes to the search index be updated through incremental indexing.

Note

When real-time indexing is off, the staging table will not receive any data for both online and batch programs.

After the batch programs are completed, incremental indexing for a search definition will take place at the scheduled time. When incremental indexing starts, real-time indexing is automatically enabled for the search definition.

Enabling Batch on Real Time Indexing

Use the Configure Batch option on the Configure Real Time Indexing page to enable a batch program.

When you select the Configure Batch option for a search definition, you can access a list of batch programs, delivered by Applications for the search definition, that can cause high volume updates to the trigger records. You can choose additional batch programs from the drop-down, but these must be coded to use the batch switch. Oracle does not recommend adding batches other than the ones delivered for the search definition.

Select batch programs by process type and process name to turn off real-time indexing for them.

Oracle delivers functions that application developers can use to programmatically turn off real-time indexing and set the document count value. However, these functions can only be used with Application Engine programs. See PeopleCode Language Reference: TurnOffRTI function.

Programs using SQL or COBOL need to perform a direct SQL execution to turn off real-time indexing.

Following is an example to turn off real-time indexing in COBOL and SQR:

```
MERGE INTO PS_PTSF_RTI_STATUS d
USING(SELECT :1 PTSF_INDEX_NAME from dual)
ON(d.PTSF_INDEX_NAME = s.PTSF_INDEX_NAME)
WHEN MATCHED THEN UPDATE SET d.PTRTISTATUS = 0
WHEN NOT MATCHED THEN INSERT VALUES(:1, 0));
```

This example illustrates the fields and controls on the Configure Real Time Indexing page with the Configure Batch option selected:

← | ⌚ | ♥

Q Search in Menu

🏠 | 🔔 | ⋮ | 🗑️

Configure Real Time Indexing

↩ Return to Search | ← Previous In List | Next In List →

Index Name **PTPORTALREGISTRY** ☒ Enable Real Time Indexing ☒ Configure Batch Save

Data Source

☒ Query/Connected Query ☒ Application Class

Data Generator Application Class

Package Name

Path

Class ID

Process ☐ No

Post Process ☐ No

> General

Batch Programs

Document Count

Processes

↑↓

	*Process Type ↑↓	*Process Name ↑↓	Honor Batch Switch ↑↓	
1	Application Engine Q	ADV_NOTICE Q	☒ Yes	+ -

Field or Control

Description

Document Count

The document count is a threshold beyond which the real-time indexing process should be disabled during batch runs. Large batch jobs with records beyond this count should have real-time indexing disabled.

The default is set to 0. 0 means real-time indexing is not turned off.

Note: This count will be used by application developers as a deciding factor to invoke the TurnOffRTI function. Applications will look for a number greater than 0 to compare to the record count for batch jobs to determine whether or not to disable real-time indexing.

Process Type

Select the process type.

Process Name

Select the process name.

Honor Batch Switch

Set the Honor Batch Switch option to Yes if you want the Real Time Indexing Switch to honor the process (batch program). When the Honor Batch Switch option is set to No, the request to turn off real-time indexing for the batch program will be ignored.

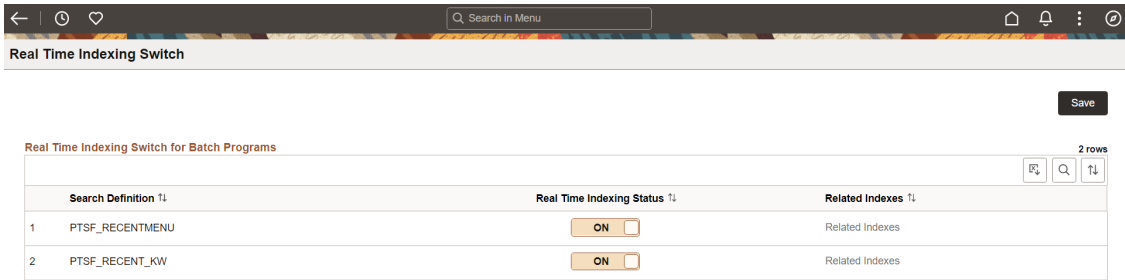
Note: Applications will deliver the configuration with the Honor Batch Switch turned off. You must turn it to Yes if you have large batch runs and you must also set the Document Count.

Using the Real Time Indexing Switch Page

The Real Time indexing Switch page displays the current real-time indexing status of the listed search definitions. Administrators can use this page to check the real-time indexing status and turn it on or off only in scenarios where real-time indexing was not automatically turned on or

off. Oracle recommends that administrators exercise caution before turning real-time indexing on or off on this page.

This example illustrates the fields and controls on the Real Time Indexing Switch page:



Field or Control	Description
Search Definition	Displays the search definition’s name.
Real Time indexing Status	Displays the real-time indexing status of the listed search definitions. Administrators can check the status and turn it on or off only in scenarios where real-time indexing was not automatically turned on or off.
Related Indexes	Select the Related Indexes link to see all the related search definitions that share a common trigger record or template (In the case of Activity Guide search definition).

Related Topics

- PeopleCode Language Reference: TurnOffRTI function

Using an Application Engine Maintenance Program

Real-time indexing uses a staging table to store the keys of the application transactions to be indexed in the search engine. The transaction data is removed from the staging table as soon as the transaction is indexed. Based on the number of search definitions enabled for real-time indexing and the volume of transactions (online or batch), frequent data inserts and deletes take place in the staging table. This can eventually cause table fragmentation and over a period of time the performance of real-time indexing may slow down due to the fragmentation as compared to the initial performance. Periodic maintenance of the staging table will restore the performance of the real-time indexing process.

PeopleSoft provides an AE program, named PTRTI_TRUNC, which performs the maintenance activities on the staging table based on the value you set for the Real Time Indexing Threshold property on the Search Options page. The program obtains a lock on the staging table, backs up the data, and then truncates the table. After a successful truncate action, the backed-up data is copied to the staging table. The successful run of the program depends on the activities on the staging table, that is, while locking and truncating the table, data insert should *not* take place on the table. If data insert takes place on the table after the lock on the table is obtained,the table is automatically unlocked to avoid any data loss. Therefore, the AE maintenance program should be run when no transactions are being inserted, deleted, or modified on the table.

For example, an administrator can plan to run the AE maintenance program after the successful completion of the application batch update. An administrator can schedule the AE

program as a recurring job at regular intervals and the job, on each iteration, performs the maintenance activity based on the availability of the table lock. However, you should note that the AE program only performs the table truncate activity if the table crosses the Real Time Indexing Threshold value specified on the Search options page. The real-time indexing process keeps track of the maximum count of the staging table rows and if the row count crosses the threshold value, the AE maintenance program is run. If the row count does not cross the threshold value, the AE program exits from the current run without proceeding for lock and truncate actions.

Related Topics

- [Managing General Search Options](#)
Use the Search Options page to manage global settings for your search configuration.

Excluding Search Definitions from Real-Time Indexing

Use the Excluded Search Definitions page to hide a search definition in the Real Time Indexing Configuration page.

Note

Applications will deliver indexes to be excluded if the index is normally updated externally and thus is not eligible for real-time indexing.

This example illustrates the fields and controls on the Excluded Search Definitions page:

Excluded Search Definitions for Real Time Indexing

	Search Definition ↑↓		
1	GP_KIB_ED_GN_SRCH Q	+	-
2	GP_KIB_ERN_DED_GN Q	+	-
3	GP_KIB_OPER_SRCH Q	+	-
4	GP_KIB_OP_TREND_SRC Q	+	-

Save

Removing a Trigger

You may need to remove a trigger if you plan to remove real-time indexing trigger from a specific transaction record. To remove an existing trigger, you should drop the trigger. However, if you drop a trigger, real-time indexing can no longer update the associated search index.

Contact your database administrator to drop a trigger.

Complete these steps to drop a trigger:

1. Open an SQL tool.
2. Run the command: `DROP TRIGGER <trigger_name>;`

where <trigger_name> is the trigger that you want to drop.

For example, DROP TRIGGER SFA_PT_PORTAL_MRU_TR;

PeopleSoft RTI trigger names have the prefix SFA and suffix TR.

Viewing Error Details in the Real-Time Indexing Process

Use the View Error Details page to check if any of the indexes configured for real-time indexing encounter an error during the real-time indexing process and to take required action.

Access the View Error Details page by selecting **PeopleTools**, and then **Search Framework**, and then **Real Time Indexing**, and then **View Error Details**.

This example illustrates the fields and controls on the View Error Details page. You can find definitions for the fields and controls later on this page.

Search Definition	Process Instance	Sequence Number	View Request	View Response
1 EP_AP_VOUCHERS		1	View Request	View Response

Field or Control	Description
Index Name	Specifies the search index in which an error has occurred.
Request	Select the View Request link to view the real-time indexing request information. Selecting the View Request link downloads a .json file.
Response	Select the View Response link to view the response from the search server. You can use the response information to identify the error and take an action to rectify the error. Selecting the View Response link downloads a .json file.
Submit	After reviewing the response, you may choose to run the real-time indexing process again. Choose the search indexes that you want to run the real-time indexing process again, and then select the Submit button. The Submit action recreates the .json file before sending to the search engine.

Migrating Real-Time Indexing Data Using ADS Definition

Oracle delivers an ADS definition to copy or migrate real-time indexing metadata from one environment to another.

For information on using ADS, see Lifecycle Management Guide: Understanding ADS Projects.

ADS Definition for Real-Time Indexing

ADS definition for real-time indexing —PTSF_REALTIMEINDEXING.

PTSF_INDEX_GROUP

Group	Details
Group Name	Group for PTSF_INDEX
Group Description	Merge group for Search Index RTI metadata
Group Member	• PTSF_INDEX.PTSF_ATTACHMENT • PTSF_INDEX.PTSF_RTI
Group Properties	Merge configurations

Tables for PTSF_REALTIMEINDEXING

Table	Description
PTSF_INDEX	Stores search definition details, such as connected query, query, application class, and so on.
PTSF_INDEXATT	Stores attachment information.
PTSF_INDEXATT_S	Stores SQL for attachments.
PTSF_INDEXCQRY	Stores parent child mapping information.
PTSF_INDEXDSEC	Stores document security.
PTSF_INDEXQRY	Stores queries in the index.
PTSF_INDEXRCLD	Stores attribute information.
PTSF_RELLANGQRY	Stores related language information.
PTSF_INDEXTREC	Stores trigger records for real-time indexing.
PTSF_INDEXTFLD	Stores trigger non-key fields for real-time indexing.
PTSF_INDEX_BODY	Stores summary information.
PTSF_INDEX_DQ	Stores delete query information.
PTSF_INDEX_LUD	Stores last updated datetime details.
PTSF_INDEX_URL	Stores drilling URL information.

Troubleshooting

To troubleshoot any errors that you may encounter while real-time indexing, you should ensure that you set the logging parameter, the Trace PC parameter, and the Trace SQL parameter.

Real-Time Indexing Logs

In the Process Scheduler configuration file (psprcs.cfg), locate the PSRTISRV section, and enter the parameter for logging and set it to 5, for example:

```
LogFence = 5
```

Note

LogFence in the PSRTISRV section is applicable to the PSRTISRV server process only; not applicable to other servers.

Trace PC

In the Application Server configuration file (psappsrv.cfg), locate Trace PC and set the value to 2048, for example:

Trace PC = 2048

Trace SQL

In the Application Server configuration file (psappsrv.cfg), locate Trace SQL and set the value to 1, for example:

Trace SQL = 1

Working with PeopleSoft Search Framework Utilities

Using the Search Test Page

This section contains an overview of search test page.

Understanding the Search Test Page

The search test page enables you to test an index independent of any existing PeopleSoft application PeopleCode or additional APIs. Using the Search Test page, you can isolate various search features and view the behavior, without signing on to the PeopleSoft application or the search engine. Also, by observing the underlying PeopleCode, the Search Test page can be a useful tool when studying the use and behavior of the query API. If you do not enter any criteria on the Search Test page, and click Search, the system will return all documents indexed for a search instance in the search engine. Using the criteria on this page, you can test how you anticipate search results to display for your application.

Access the Search Test page by selecting **PeopleTools**, and then **Search Framework**, and then **Search Admin Activity Guide**, and then **Testing and Utilities**, and then **Search Test Page**.

This example illustrates the fields and controls on the Search Test page. You can find definitions for the fields and controls later on this page.

The screenshot displays the Search Test Page interface. At the top, there is a header bar labeled "Search Administration Activity guide". Below this, the page is divided into two tabs: "Search" (active) and "Results".

The "Search" tab contains several input fields and controls:

- *Search Instance:** A text box with "PTSF_DEFAULT" and a search icon.
- Search Text:** A large text box for entering search criteria.
- Start Index:** A text box with "1".
- Docs Requested:** A text box with "10".
- Language:** A dropdown menu set to "English".
- Refresh Security Cache:** A button.
- Duplicates:** A section with checkboxes for "Remove" and "Mark".
- Show image in result:** A checkbox.
- Search Only in Attachments:** A checkbox.

Below these fields is a section titled "Search Category to Search in" with a search icon and navigation controls. It includes a "Name" field with "PTPORTALREGISTRY" and a "Menu" field. There are buttons for "Get Facets", "Search Fields", and "Display Fields", along with "+" and "-" icons.

At the bottom, there is a section titled "Custom Search Attributes" with expandable options: "Filter Settings", "Facet Request", "Grouping /Sorting Options", and "Additional Parameters".

Field or Control	Definition
Search Instance	Choose a search instance from which you want to fetch search results.
Search Text	Enter the free text search request string to test.
Search	Select to initiate the search request against the desired search instance.
Start Index	Enables you control which result document displays first. For example, if you set it to 10, the system displays the 10th search result at the top of the search result list.
Docs Requested	Enables you to control the number of search results displayed on the Results tab.
Language	Select the language for which you want to test the search index. Select blank to run against all languages.
Refresh Security Cache	When you select the Refresh Security Cache button, all the security values for the particular user are deleted from the search engine server. Then during the next search on a particular index, security values will be fetched from PeopleSoft for that index alone. When complete, you should see a message similar to: <i>Security cache cleared successfully (262,1300)</i>
Duplicates	Enables you to control how duplicates are displayed: • <i>Remove</i>. Duplicates are not displayed. • <i>Mark</i>. Duplicates are displayed, but they are marked to indicate the duplicates. Important: To emulate the current default PeopleSoft Search Framework behavior, clear both <i>Remove</i> and <i>Mark</i> in the Duplicates group box.
Show image in result	If you have a drilling URL pointing to an image field, and you want to display the image in the test results, select this option.
Search Only in Attachments	If you have a search definition that contain configured attachments, and you want to do a keyword search in attachments alone, select this option.
Get Facets	Select the Get Facets button to automatically load the Facet Requests group box with all valid facets for the selected search category.
Search Fields	Select the Search Fields button to automatically load the Filter Settings group box with all valid filters for the selected search category.
Display Fields	Select the Display Fields button to automatically load the Custom Search Attributes group box.

Testing Search Categories

The Search Category to Search in group box enables you to narrow the search only to a specific search category or set of search categories. Add search categories to the grid as needed to increase the scope of the search.

Testing Custom Search Attributes

The Custom Search Attributes group box enables you to identify specific search attributes and display the actual values for a search document in the search results. That is, in addition to the URL and summary in the search results, the results will also display the values for the fields you add to the Custom Search Attributes grid. The search attributes must be indexed fields in the search definition.

This group box can be automatically loaded by selecting the Display Fields button.

Testing Filter Settings

The Filter Settings group box enables you to search specific values of your attributes using the available operators.

This group box can be automatically loaded with all valid filters for the selected search category by selecting the Search Fields button.

If you have multiple attributes in the grid, use *Match Any* to return results that match any of the filters, and use *Match All* to display results that meet the criteria for all of the filters.

You can also enter a score for an attribute in order to boost the score of the attribute, which works in conjunction with the score operation option.

The following score operations can be used:

- Average - the averaged score is used.
- Maximum - the maximum score is used.
- Minimum - the minimum score is used.
- Sum - the scores are added.

Note

The operators displayed for testing filter settings on the Search Test page represent all possible operators that can be utilized by way of the delivered PeopleCode API. However, depending on the application's usage of the PeopleCode API and the data type of the field itself, end users will see varying display of the possible operators when defining search criteria. For example, *Equal To* applies only to number data types, while *Contains Phrase* applies only to character data types, and the appearance of the *Between* operator depends on the application's usage of the delivered PeopleCode. Refer to the PeopleSoft Search Framework PeopleCode documentation for more information.

Related Topics

- [Boosting Score of Search Results](#)
When end users search for content, the listing of search results is based on the score of a match. A match with the highest score is displayed at the top of the search-results list. PeopleSoft Search Framework allows application designers to programmatically boost the score of a result so that the most relevant results are displayed.

Testing Facet Requests

The Facet Request group box enables you to test and isolate specific facets. For example, you can find those that contain no search results in certain scenarios, or compare facet counts to attribute counts.

This group box can be automatically loaded with all valid facets for the selected search category by selecting the Get Facets button.

Field or Control	Description
Minimum Doc Count	Enables you to control the facets that display based on their count. For example, you can display facets that contain zero results, or only those which contain at least 10.
Maximum Facet Children	This applies to all facet requests. This determines the maximum number of facet nodes (facet values) returned by the API. The default is -1 where in all the children will be displayed.
Maximum Tree Facet Nodes	Enables you to control the nodes that display for hierarchical facets. The default value is 1000, which is configured on the Search Options page. You can override the value configured on the Search Options page by entering a new value.
Facet Name	Select the name of the facet you want to test.
Facet Path	This applies to all facet requests. The results will be filtered by the facet values specified in the path. In the case of hierarchical facets, the path can have the hierarchy information. For example, United States/CA/Pleasanton
Additional Details	Enables you to select or deselect the Allow Multi Select check box that controls the selecting of multiple facet values on the Results page.
Return Count	Select to display the number of documents the facet contains.
Sort By	You can sort facets alphabetically or by count in ascending or descending order.

Testing Grouping and Sorting Options

The grouping and sorting options are not implemented in current release. These options are reserved for future use.

Testing Additional Parameters

The additional parameters options are not implemented in current release. These options are reserved for future use.

Downloading Search Data

If you need to share search definition information with Global Software Support (GSS) related to search definitions you are troubleshooting, use the Asynchronous Details page.

Note

This is applicable only when **Full Direct Transfer** is set to *N* on the Search Options page.

To download search data:

1. Select **PeopleTools**, and then **Integration Broker**, and then **Service Operations Monitor**, and then **Monitoring**, and then **Monitor Asynchronous Services**.
2. Select the Subscription Contracts tab.
3. In the Queue Name field, select PTSF_ES_SEND_Q.

PeopleSoft Search Framework uses this queue to communicate with the search engine server.

4. Filter the search results using Status and Date to locate the desired sub-queue.
5. Click the Details link.
6. On the Asynchronous Details page, click the Download XML link.
7. Save the xml file to the location you want.
8. Open the file using a text editor program.

This example illustrates the Source XML Data.

```

<?xml version="1.0"?>
<data psnonxml="Yes">
  <![CDATA[--SEARCH INSTANCE START | PTSF_DEFAULT | SEARCH
INSTANCE END--{ "index" : { "_index" :
"orcl_es_defaultindex_t56805r2", "_type" :
"ptportalregistry_t56805r2", "_id" : "http://
\slc09kec.us.oracle.com:8000\psp\t56805r2x\PORTAL\QEDMO\c
\DEFINE_GENERAL_OPTIONS.RUN_FIN0004.GBL" } }
{"ORCL_ES_LINK" : "http://\slc09kec.us.oracle.com:8000\psp
\t56805r2x\PORTAL\QEDMO\c
\DEFINE_GENERAL_OPTIONS.RUN_FIN0004.GBL", "ORCL_ES_TITLE" :
"Account Types", "ORCL_ES_DESCRIPTION" : "<BR>Application:
QE_LOCAL", "ORCL_ES_LAST_MODIFIED_DATE" : "2016-08-
17T17:50:59.000Z", "PTSF_SBO_NAME" : "T56805R2
PTPORTALREGISTRY", "ORCL_ES_IMAGE_URL" : "http://
\slc09kec.us.oracle.com:8000\psc\t56805r2x\EMPLOYEE
\T56805R2\q\/?
ICAction=ICQryImageUrl=PUBLIC.PTPORTALTILES&IMGFIELD=CONTIMG&IMG
RECORD=PTSTILEIMG_VW&PORTAL_NAME=PORTAL&PORTAL_OBJNAME=RUN_FIN000
4&PORTAL_REFTYPE=C", "DESCR254" : [ "", null ], "PORTAL_LABEL" : [
"Account Types", null ], "PORTAL_NAME" : [ "PORTAL", null
], "PORTAL_PRNTLABEL_PORTAL_FLDR" : [ "Define Business
Rules", null ], "PORTAL_SOURCE" : [ "Application: QE_LOCAL", null
], "PTSF_NAV_MODE" : [ "1", null ], "PORTAL_SECTYPE_ORCL_ES_ACL" :
[ "P:ALLPNLS", "P:QEALLPGS", "S:Admin", null
], "ORCL_ES_LANGUAGE_CD" : "ENG"}
{ "index" : { "_index" : "orcl_es_defaultindex_t56805r2",
"_type" : "ptportalregistry_t56805r2", "_id" : "http://
\slc09kec.us.oracle.com:8000\psp\t56805r2x\PORTAL\QEDMO\c
\DEFINE_GENERAL_OPTIONS.RUN_FIN0005.GBL" } }
{"ORCL_ES_LINK" : "http://\slc09kec.us.oracle.com:8000\psp
\t56805r2x\PORTAL\QEDMO\c
\DEFINE_GENERAL_OPTIONS.RUN_FIN0005.GBL", "ORCL_ES_TITLE" :
"Units of Measure", "ORCL_ES_DESCRIPTION" : "<BR>Application:
QE_LOCAL", "ORCL_ES_LAST_MODIFIED_DATE" : "2016-08-
17T17:54:59.000Z", "PTSF_SBO_NAME" : "T56805R2
PTPORTALREGISTRY", "ORCL_ES_IMAGE_URL" : "http://
\slc09kec.us.oracle.com:8000\psc\t56805r2x\EMPLOYEE
\T56805R2\q\/?

```

Running Diagnostics

Access the Round-Trip Test page by selecting **PeopleTools**, and then **Search Framework**, and then **Search Admin Activity Guide**, under Testing and Utilities, then select Round-Trip Test.

The round-trip test performs a set of diagnostic steps using a test search definition, delivered with PeopleTools named RNTRPTST. It provides end-to-end diagnostic tests to verify and troubleshoot the PeopleSoft and search engine integration.

This example illustrates the fields and controls on the Round-Trip Test page. You can find definitions for the fields and controls later on this page.

Round-Trip Test

Round-Trip Test

Round-Trip test on search instance

Search Instance

PTSF_DEFAULT

Q

Test Steps

STEP 1: Ping Test

STEP 2: Deploy

STEP 3: Crawl

STEP 4: Search

Cleanup

Test Log

Round-Trip test log

Ping Test Result: Success. opensearch version 2.3.0

Undeploying. Cleaning up any data previous run

Undeploy completed

Deploying search definition

Deployment Complete

Starting Crawl

ES crawling status : Executing , time elapsed 23.24.18.828000 sec, next check after 10 sec

ES crawling status : Executing , time elapsed 23.24.18.828000 sec, next check after 10 sec

ES crawling status : Executing , time elapsed 23.24.18.828000 sec, next check after 10 sec

Crawl Completed

Field or Control	Description
Search Instance	Select the appropriate search instance defined for this PeopleSoft system.
Test Steps	The Test Steps grid contains a series of links that are ordered in a typical troubleshooting sequence. Only one link is active at a time, and each link becomes active only after the previous step has completed successfully. 1. Ping Test: Runs a ping test against the search engine server instance defined for your system. 2. Deploy: Deploys the RNTRPTST search definition and associated category to the search engine. 3. Crawl: Runs a test crawl using the RNTRPTST definition. 4. Search: Runs a sample search based on the index populated by the RNTRPTST search definition. 5. Cleanup: Click to remove the deployment of the RNTRPTST search definition and run any related cleanup tasks.

Field or Control	Description
Test Log	Indicates whether the system successfully created the feed output, required to populate the index.

Viewing Event Logs

View event logs on the Events Log page by selecting **PeopleTools**, and then **Search Framework**, and then **Search Admin Activity Guide**, and then **Testing and Utilities**, and then **Events Log**.

This example illustrates the fields and controls on the Event Logs page. You can find definitions for the fields and controls later on this page.

Events Log

Event Logs

View Search Framework Event Logs

Event Name

All

Event Severity

All

View Events

Purge Logs

Time Period

From

05/11/2016

To

08/09/2016

From Time

12:00:01AM

To Time

11:59:59PM

Events	Personalize	Find	View All	First	1 of 1	Last
Created	Event Name	Message Description	Message Text	Severity		
1						

Field or Control	Description
Event Name	Select the name of the event by which to filter the logs.
Event Severity	Narrow the event display focus by selecting one of these severity levels: - All: Displays all types of event logs (Error, Message, Warning). - Error: Displays only error messages. - Message: Displays the typical status messages the system records after each event. - Warning: Displays only warning messages.
View Events	Click to display the events meeting your criteria in the Events grid based on Time Period settings. For example, after selecting a time period, click View Events to display only the logs that fall within that period.

Field or Control	Description
Purge Logs	After selecting a time period, click Purge Logs to remove from the system the logs from that time period. Click View Events to refresh the events list. This can help to keep the stored log information at a manageable size.
Time Period	Specify the specific time period for which you seek event log information.

Working with PeopleSoft Search Framework Security Features

Understanding Search Framework Security

By default, Search Framework and the related search engine possess security features designed to protect all of the data and processes within the system. PeopleSoft adds two plug-ins as security measures required for authenticating and authorizing users in the search system. These security plug-ins are bundled with the installation of the search engine. This section describes security topics that pertain to the integration between Search Framework and the search engine.

For installing OpenSearch, see *PeopleSoft Deployment Packages Installation for Search Components* for the current release.

Related Topics

- [Working with Authentication and Authorization](#)
Search Framework handles various security related tasks, including:

Applying PeopleSoft Permissions

The implementation, maintenance, and use of the Search Framework involve these user types:

Role	Description	Delivered PeopleTools Permission List
Search Administrator	Responsible for managing the deployment of search definitions and search categories, scheduling index builds, monitoring indexes, and establishing connectivity between Search Framework and the search engine. Note: This user needs to have access to all the queries (records) on which the search definition is based on in order to schedule the index generation.	PTPT3100
Search Developer	Responsible for creating search queries, search definitions and search categories.	PTPT3200

Role	Description	Delivered PeopleTools Permission List
Search Server	Search engine search instance requiring access to the Search Framework service operations. Note: This is the call back ID configured in the search instance page. The Search Server role is required to be able to download attachments.	PTPT3300
Insights Administrator	This role is required to access the Insights menu under Reporting Tools.	PTPT5700
End User	Runs search queries while using PeopleSoft applications, using Global Search or Search Pages. See the <i>Application Fundamentals PeopleBook <for your product line></i> for the relevant roles needed for Global Search.	None specific to Search Framework. Restrictions to search results can be implemented by user profile or role. PTPT1000 is required for the PTPORTALREGISTRY search definition.

Note

Search Administrator, Search Developer, and Search Server are roles delivered by PeopleTools.

Working with Authentication and Authorization

Search Framework handles various security related tasks, including:

- Authenticating users (development, administration, and end users).
- Authenticating systems requesting access to service operations.
- Authorizing end user search requests.

When managing search requests with Search Framework, it is important to distinguish between *authentication* and *authorization*.

Authentication determines if a user is a legitimate user, who can access the system. Authentication is configured using PeopleSoft user profiles, roles, and permission lists.

Authorization determines the access level for an authenticated user. Once a user is authenticated, the system invokes the authorization rules. You define authorization (access controls) per search definition on the Security tab. For some instances, applying No Security is a valid option. However, for other situations, you need to apply stricter control over what users can and cannot see. You can restrict access by the source (search definition) or by the document (search result).

Source-level security applies to all the documents in the data source. Setting source-level security is useful when you want to prevent global visibility of data source content. When

defining a source-level security you specify the users and roles that can view the search results for that search definition. When a user searches the associated index, the system verifies the user's access level prior to displaying any search results.

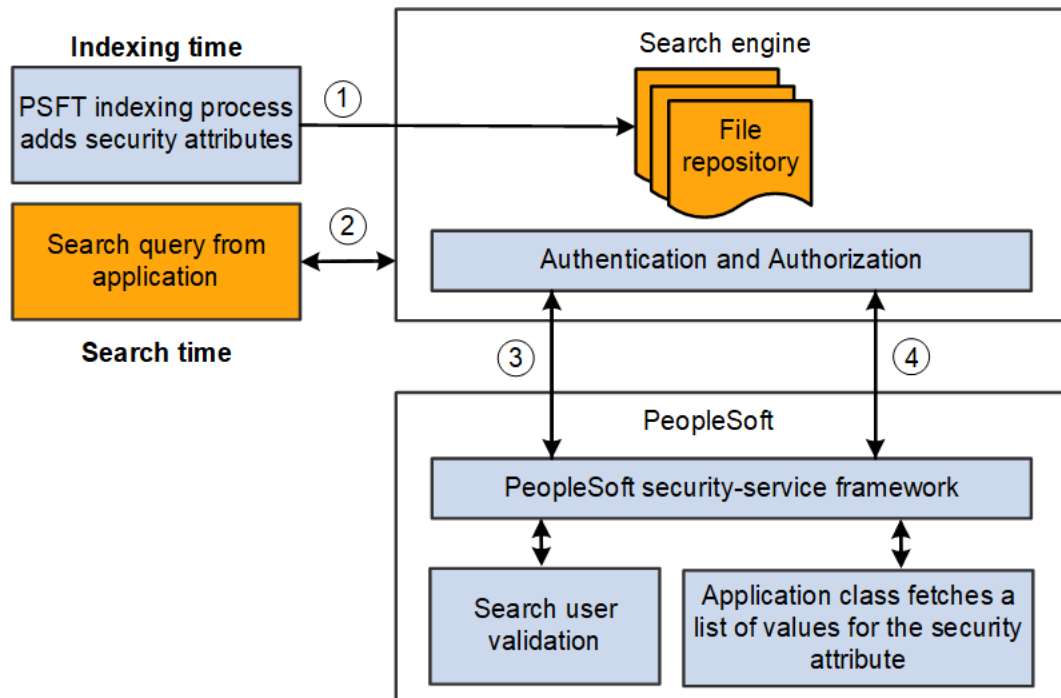
Document-level security restricts access to specific search results. The document-level authorization uses security attributes. The attributes are defined using PeopleSoft Query or Connected Query during design time and are used to evaluate access during runtime. While defining a search definition, some of the fields chosen for the query may not be used necessarily for searching, but mainly as security attributes. For example, Department ID or Business Unit are examples of attributes that users may not necessarily search on, but their values can be used in the authorization process to evaluate if a user can view search results for a specific Department ID or Business Unit.

If applying any level of security, you should define an application class for every search definition. The application class is responsible for fetching a list of runtime values based on the security attributes. You associate the application class with a search definition on the Security tab of the search definition.

Authentication and Authorization in Search Engine

The following diagram illustrates the elements involved with authorization and authentication and the interaction between them.

This example illustrates how PeopleSoft and search engine interact to authenticate users and authorize user access to search results.



Step	Description
1	During the index build, the crawler collects the defined security attributes and access restriction options associated with search definitions. The crawler applies those security attributes to the data sources (indexes).
2	An application end user runs a search query.
3	The search engine security framework using the <i>orcl-security-plugin</i> invokes the PeopleSoft security service for user authentication.
4	Based on the authenticated user, the search engine performs either a source-level or a document-level authorization using the <i>orcl-security-plugin</i> . For document level authorization PeopleSoft invokes the Application class defined for the Data Source. This would fetch a list of values for the security attribute which then the search engine would use for filtering the search results.

Configuring SSL between PeopleSoft and Search Engine

You can configure SSL connections between your PeopleSoft system and OpenSearch. When you have SSL configured, you then need to set the SSL Option field on the Search Instance Properties page to ENABLE.

To set up SSL on the PeopleSoft system, use the instructions provided in the System and Server Administration guide. See System and Server Administration: Implementing WebLogic SSL Keys and Certificates.

After you configure SSL in OpenSearch, add the CA root certificate of OpenSearch to the PeopleSoft keystore so that it will be trusted.

1. Copy the OpenSearch CA root certificate (for example, trustedCA.cer) to the Webserver folder.
2. Use `pskeymanager -import t` command to import the certificate to the PeopleSoft truststore.

Configuring SSL for OpenSearch

To set up SSL in OpenSearch, complete these steps in all the nodes of the OpenSearch cluster:

Note

Keystore and Truststore files should be placed under the `OS_HOME/config` directory.

1. Import the trusted root from Certification Authority (CA) and save it locally, for example, `/home/certs/cacert.cer`.

2. Set up truststore and import trusted root certificate from CA to the truststore using JAVA_HOME/bin keytool.

```
keytool -importcert -keystore OS_HOME/config/keystore/mytruststore.jks -
file /home/certs/cacert.cer -alias my_ca
```

When prompted, provide a password. This should be later encrypted and placed in the opensearch.yml configuration file.

In steps 7, 8, and 9, when prompted whether you trust this certificate, enter **Yes**.

3. Set up keystore and private key.

```
keytool -genkey -alias node_alias -keystore OS_HOME/config/keystore/
mykeystore.jks -keyalg RSA -keysize 2048 -validity 90
```

When prompted, provide a password. This should be later encrypted and placed in the opensearch.yml configuration file.

Enter details for the questions prompted on the screen.

Enter key password for <node_alias> when prompted on the screen.

4. Create Certificate Signing request (CSR).

```
keytool -certreq -alias node_alias -keystore OS_HOME/config/keystore/
mykeystore.jks -file /home/certs/mycsr.csr -keyalg rsa
```

This step creates a CSR.

5. Use the CSR to get a certificate from CA. Download it and save it locally, for example, /home/certs/signed.cer.
6. Import the certificate to the Keystore. Use the same alias as the private key and certificate request.

```
keytool -importcert -keystore OS_HOME/config/keystore/mykeystore.jks -
file /home/certs/signed.cer -alias node_alias
```

7. In the opensearch.yml configuration file, add these properties to set up SSL:

Field or Control	Description
orclssl.http.ssl	true
orclssl.transport.ssl	Set the property to <i>true</i> if you want to enable SSL in transport layer for node to node encryption. Enter <i>false</i> if you want to disable SSL in transport layer.
orclssl.keystore	<path to keystore>
orclssl.keystore_password	<keystore password>
orclssl.truststore	<path to truststore>
orclssl.truststore_password	<truststore password>
orclssl.callback	To set this property, refer to the Call Back Properties section in Creating Search Instances .

8. Use the `opensearchuser` script to encrypt the keystore and truststore password.

```
OS_HOME/bin> opensearchuser encrypt [password]
```

9. Use the encrypted password for the `orclssl.keystore_password` and `orclssl.truststore_password` in the `opensearch.yml` configuration file.

Note

As both HTTP and HTTPS use the same channel, the port for HTTPS is the same as the one configured in `http.port` in the `opensearch.yml` configuration file. After SSL is enabled, the port configured for HTTP becomes HTTPS and HTTP will be disabled.

Configuring SSL for OpenSearch Dashboards

You can configure SSL for OpenSearch Dashboards. When you configure SSL for OpenSearch Dashboards, you need to set the SSL Option field (in the OpenSearch Dashboards section) on the Search Instance Properties page to ENABLE.

To set up SSL for OpenSearch Dashboards, complete these steps:

1. Configuration required in `opensearch_dashboards.yml`:

```
server.ssl.enabled: true
server.ssl.certificate: <certificate issued by server> (for example,
signed.cer)
server.ssl.key: <keystore> (for example, mykeystore.key)
orclAuthKibana.isSec : true
```

Note

The `orclAuthKibana.isSec` property must be set to true for SSL setup and false for non-SSL setup. The default value is false.

If OpenSearch is SSL enabled, you need to complete the following additional configuration:

```
opensearch.ssl.certificateAuthorities:(for
example,"C:\OS\opensearch3.2.0\plugins\orcl-security-
plugin\config\properties\cacert.cer")
```

Note

Keystore and certificate should be placed in the bin (default) folder or config folder (specify the path in `opensearch_dashboards.yml`).

2. Import the trusted root from CA and save it locally (for example, `D:\ca\cacert.cer`).

3. Import root certificate from CA to the keystore using keytool:

```
JAVA_HOME\bin>keytool -importcert -keystore OSD_HOME/bin/mykeystore.jks -
file D:\ca\cacert.cer -alias my_ca
```

4. Setting up keystore and private key:

```
keytool -genkey -alias alias1 -keystore OSD_HOME/bin/mykeystore.jks -
keyalg RSA -keysize 2048 -validity 712
```

5. Create certificate signing request:

```
keytool -certreq -alias alias1 -keystore OSD_HOME/bin/mykeystore.jks -file
D:\ca\mycsr.csr -keyalg rsa
```

This command creates a CSR as follows (this CSR is only for sample reference):

```
-----BEGIN NEW CERTIFICATE REQUEST-----
MIIC6zCCAdMCAQAwdjELMAkGA1UEBhMCSU4xEjAQBgNVBAgTCUthcm5hdGFrYTESMBAGA1UEBxM
J
QmFuZ2Fsb3JlMQ8wDQYDVQQKEWZPcmFjbGUxEzARBgNVBAStCBlb3BsZXNvZnQxGTAXBgNVBAM
T
EFJvaGluaSBQYWxsalhbGkwggEiMA0GCSqGSIb3DQEBAQUAA4IBDwAwggEKAoIBAQCt1Tr4o6Y
i v/
dkwqhiCJ4d6ddVhyGTMzBHSQB6tv10GvNWjmJMQXWepAsu6gOgoECY0HwGC4L1bQh7hiwyT3ub
ckTYnWULNgf1WuLUipyU9Z3Aj1BV3uhZWwJPnTC1JRyXIdvOMocpIM3YdQF1ZY3eOMY3Y1KT3ZM
O
GnDQzpSLFuXcVyAwbg32LKE9Sw2zVIM8ueb6h1szv3U3KhJB7dI5inpoXg7cpnZxzjUK303HhB5
l
im003aPslhLb9rt9KjhAI4nxrpM9FEoAZI9V1NVpqfIksdBLVRnCcZGbnQh5n2nw3on50FoNoRU
I
mTBc6VswPxHDz+bBAgcE0U8ETY39AgMBAAGgMDAuBgkqhkiG9w0BCQ4xITAFMB0GA1UdDgQWBBT
JQ2nGlpP2ke5Z8HBrfvnBsgUjwTANBgkqhkiG9w0BAQsFAAOCQAQEAEmcwNcQnAPTxfpHHbUIpsY
+/ NhmfaltnhDq6AAcOL/rBmymgafdqDlIGWJ7tYJ/
1zCjkFx9zeIh6RKhBHjzpuf8uM7Q1JJVB7CKI
GP5UxJEs4bsg0qjSs8m71zGEW1D9gopYhGQJmcJr929NeR9k4cMMLpSbpsox2CPjstiepzIVKJE
q ppqG3G+PXUZMW04Va/SCGhMNdCLsd6XV3I5UWNCMNuJFEyBF4KVH6EJf59/
vt3L2tQaV2X7JydcH 8llaFxBPwCJe2GCB7Yo9Pi90lkDFIkk2cAHry576Gf/T7GwHBg4/4T/
vCRV1aZtKaRYJDmUW+5ae 4Nmzp3YwcTrdzg==
-----END NEW CERTIFICATE REQUEST-----
```

6. Use the CSR to get a certificate from CA. Download it and save it locally (for example, D:\ca\signed.cer).
7. Import the certificate to the keystore:

```
keytool -importcert -keystore OSD_HOME/bin/mykeystore.jks -file
D:\ca\signed.cer -alias alias1
```

8. Convert the keystore file to pem format because OpenSearch Dashboards does not support any other format.

```
keytool -importkeystore -srckeystore OSD_HOME/bin/mykeystore.jks -
destkeystore OSD_HOME/bin/mykeystore.p12 -srcstoretype jks -deststoretype
pkcs12
```

Move the intermediate mykeystore.p12 file to Linux and execute the below commands:

```
openssl pkcs12 -in mykeystore.p12 -out mykeystore.pem
```

Or directly use this command:

```
keytool -list -rfc -keystore "mykeystore.jks" | sed -e "/- *BEGIN [A-Z]*-  
*/,- *END [A-Z]*- */!d" >> "myKeystore.pem"
```

9. Convert the pem file to .key format: `openssl rsa -in mykeystore.pem -out mykeystore.key`
10. Update the `opensearch_dashboards.yml` file with the SSL settings.

Configuring SSL for Logstash

When you plan to configure SSL for Logstash, you may consider the following scenarios:

Scenario A: If you are planning to configure SSL during the installation of Logstash, follow these sequence of steps:

1. Complete the installation of Logstash.
2. Configure SSL for Logstash. Follow the steps described in the Configuring SSL section.
3. Start the Logstash service.
4. Set up external data integration with PeopleSoft.

See [Setting Up the Integration of External Data with PeopleSoft](#).

Scenario B: If you have installed Logstash and completed setting up external data integration with PeopleSoft, follow these sequence of steps:

1. Navigate to the Manage External Search Index page (**PeopleTools**, and then **Search Framework**, and then **Deploy External Source Defns**, and then **Manage External Search Index**) and select Stop to abort the indexing process.

See [Building an Index for an External Data Search Definition](#).

2. Delete the external search index if not required.
3. Stop the Logstash service.
4. Configure SSL for Logstash. Follow the steps described in the Configuring SSL section.
5. Start the Logstash service.
6. Set up external data integration with PeopleSoft.

See [Setting Up the Integration of External Data with PeopleSoft](#).

Configuring SSL

When you configure SSL for Logstash, you need to set the SSL Option field (in the Logstash section) on the Search Instance Properties page to Enable.

To set up SSL for Logstash, complete these steps:

1. Encrypt the keystore password using the following steps:

Windows:

```
set LOGSTASH_HOME= <Install_Dir>\pt\Logstash9.1.3
set JAVA_HOME= <JAVA_HOME>
LOGSTASH_HOME\pt\bin>PSLSCipher.bat <keystore password>
```

Linux:

```
export LOGSTASH_HOME= <Install_Dir>\pt\Logstash9.1.3
export JAVA_HOME= <JAVA_HOME>
LOGSTASH_HOME\pt\bin>PSLSCipher.sh <keystore password>
```

2. Edit the following parameters in the http section of the orcl_psft_main.config file, which is located at <LOGSTASH_HOME>/orcl_psft_ext_config/orcl_psft_main.config. Copy the encrypted password from step 1 and include in the keystore password parameter.

```
input {
  http {
    host => "xxxxxx" # default: 0.0.0.0
    port => yyyy # default: 9800
    ssl => "true"
    keystore => "<Path to Keystore>/mykeystore.jks"
    keystore_password => "<Encrypted Keystore password>"
  }
}
```

3. Edit the cacert parameter in the output_type_opensearch section of the psftextdata.template file, which is located at <LOGSTASH_HOME>/orcl_psft_ext_config/orcl_psft_main.config.

For the cacert parameter, enter the path to the certificate file. For example, if path to the certificate file is C:\dir1\dir2\RootCA.cer, the cacert parameter value should be cacert => "C:\dir1\dir2\RootCA.cer" as shown in the following sample:

```
<output_type_opensearch>
  opensearch {
    hosts => ["<output.opensearch.hosts>"]
    index => "<output.opensearch.index>"
    user => "osadmin"
    password => "<Encrypted Password>"
    cacert => "C:\dir1\dir2\RootCA.cer"
  }
</output_type_opensearch>
```

4. Start the Logstash server using the following batch scripts:

Windows:

```
start_psftext_logstash.bat
```

Linux:

```
start_psftext_logstash.sh
```

After setting up SSL for Logstash, you can configure the external data setup, and then begin the indexing process.

Setting Up Role-Based Search Group Access

Global Search displays search groups in the Global Search Bar based on the user's role. If a search group assigned to a context belongs to the permissions for a role to which that user belongs, then the search group will appear in the search group drop-down list for that user. You configure search group access by selecting **PeopleTools**, and then **Security**, and then **Permissions and Roles**, and then **Permission Lists**, and then **Search Groups**.

Note

PeopleSoft Applications delivers pre-defined roles for each search group they define. Normally these roles will begin with the word 'Search'. See the *Application Fundamentals PeopleBook <for your product line>* for a complete list of all pre-defined roles.

This example illustrates the fields and controls on the PeopleTools Permission Lists: Search Groups page. You can find definitions for the fields and controls later on this page.

Query | Mass Change | Links | Audit | Data Migration | **Search Groups**

Permission PTPT1000
List
Description PeopleSoft User

Search Groups		Personalize	Find	First	1-2 of 2	Last
* Search Group Name	Description					
PTPORTALREGISTRY	Navigator					
PTSEARCHREPORTS	Reports					

Use the Search Groups grid to add search groups to which you want to add access. Search groups are those search categories that have the Search Group check box selected on the General tab of the search category definition.

Note

This does not define access to the data, but only gives a mechanism to control what search groups are seen in the Global Search Bar for any given user. Component-level security must still be granted to the user in order for them to click a result and be taken into the data.

Related Topics

- [Working with Global Search](#)
This section provides an overview of working with global search.

Managing Configurable Search

Understanding Configurable Search

Configurable search enables you to configure search pages for classic and fluid components based on your business requirements. It also enables you to maintain the same search experience across the PeopleSoft system. The PeopleTools delivered configurable search provides areas for configuration as described in this topic.

Configurable search enables you to manage search pages with minimal effort and reduces the dependency on Application Designer. Administrators can configure search pages for components to use either a search record (standard search) or a search definition (keyword search).

Search Pages Delivered for Configurable Search

PeopleTools delivers search pages for fluid and classic components, which are dynamically presented as the search page at runtime based on certain conditions that are described later in this topic.

PeopleTools delivers the following search pages:

- PTS_CFGSRCH_FL search page for fluid components.
- PTS_CFGSRCH_CL search page for classic components.

Using the Manage Configurable Search page, you can configure the dynamic presentation of the delivered search pages to suit your business requirements.

Example of configurable search for a classic component.

Find an Existing Value ⊕ Add a New Value

▼ **Search Criteria**

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

🕒 **Recent Searches** Choose from recent searches ✎ 🔖 **Saved Searches** Choose from saved searches ✎

Search by: Permission List ▼ contains

▼ **Show more options**

☐ Case Sensitive

Search Clear

Related Topics

- [Specifying System-wide Configurable Search Properties](#)
Use the Configurable Search Options page to specify system-wide configurable search properties.

- [Working with Configurable Search](#)
The implementation of configurable search requires you to specify system-wide search properties on the Configurable Search Options page and specify component content reference specific properties on the Manage Configurable Search page.

Considerations for Using Configurable Search

Consider the following when you use configurable search in classic or fluid components:

- Supported primary action.

Configurable search does not support a combination of new, search, and keyword search as primary action for a single component. Configurable search supports the following combinations for primary action:

- New only.
- Search only.
- Keyword Search only.
- New and Search.
- New and Keyword Search.

For descriptions of these primary actions, see [Working with Search Pages](#).

If your business requirements demand both search and keyword search as primary action, you may consider registering two content references for the single component. In this case, you can configure one content reference for standard search and configure the other content reference for keyword search.

Component Properties page - primary actions and search/lookup types.

Component Properties

General

Use

Internet

Fluid

Style

Search Page

Primary Action

☐ New
 ☒ Search
 ☐ Keyword Search

Default Search Action:

Update/Display

Default Search/Lookup Type:

☒ Basic
 ☐ Advanced
 ☐ Keyword Only

☒ Allow Action Mode Selection

Link To Add Page	Message Set/Nbr:	124	62
Link To Find Existing Value Page	Message Set/Nbr:	124	63
Link To Realtime Search Page	Message Set/Nbr:	124	63
Link To Keyword Search Page	Message Set/Nbr:	124	433
Instructional Text	Message Set/Nbr:	124	50

- Supported search or lookup types.

Configurable search supports only Basic and Advanced as the search/lookup types for the search and keyword search primary actions. Keyword Only search/lookup type is *not* supported. For example, if the Keyword Only search/lookup type is selected for a component, and if the component is enabled for configurable search, the Basic search is displayed at runtime; the Keyword Only option is not honored.

For descriptions of search/lookup types or search modes, see [Working with Search Pages](#).

- In configurable search, the number of search results is specified on the Configurable Search Options page. The default value for the number of search results is 100, however you may modify this value on the Configurable Search Options page. Configurable search uses this value to limit the number of search results across classic and fluid components and standard and keyword search.

See [Specifying System-wide Configurable Search Properties](#).

- In configurable search, related actions are *not* displayed in search results, by default. However, you can display the related actions in search results by setting the **Show Related Actions in Search Results** property to Yes.
- Configurable search supports facets on keyword search pages.
- Configurable search supports data masking for sensitive data and personally identifiable information (PII).

Guidelines on Using Configurable Search for Classic Components

Follow these guidelines when you plan to configure search for classic components:

- By default, the delivered (new) classic search page is displayed instead of the old standard component search page without any additional configuration on your part.
- If search is enabled for a component (that is, a valid search record is configured for the component and a search key exists), which search page gets displayed is based on these conditions:
 - If a custom search page (where page type is set to Search Page on the Use tab of the Page Properties dialog box in Application Designer) has been added to the component definition, the custom search page is displayed.
 - If configurable search has been configured for the content reference, then the delivered (new) classic search page is displayed reflecting that configuration. If configurable search has not been configured for the content reference, then the delivered (new) classic search page is displayed in its default state.
- If a component is not search enabled (that is, the component search record has no search keys and the Update/Display check box on the Use tab of the Component Properties dialog box is not selected), the system directly loads the transaction page, which is similar to the functionality prior to PeopleTools 8.60.

Guidelines on Using Configurable Search for Fluid Components

Follow these guidelines when you plan to configure search for fluid components:

- By default, search pages on fluid components are not replaced with the delivered (new) fluid search page. That is, for fluid components, you need to enable configurable search. You can enable configurable search either through Application Designer (using the Enable Configurable Search check box on the Component Properties dialog box) or through browser (using the Manage Configurable Search page). Oracle recommends that you

enable configurable search for fluid components through browser because it's easier and cost effective.

For information on using the Enable Configurable Search check box, see "Using the Enable Configurable Search Check Box for Fluid Components" section later in this topic.

For detailed steps on configuring a search page, see [Working with Configurable Search](#).

- By default, new fluid components use the delivered (new) fluid search page.
- If search is enabled for a component (that is, a valid search record is configured for the component and a search key exists), the system displays a different search page based on these conditions:
 - If a custom search page (of type Search Page) has been added to the component definition, the custom search page is displayed.
 - If configurable search has been configured for the content reference, then the delivered (new) fluid search page is displayed reflecting that configuration. If configurable search is merely enabled on the component definition but there is no content reference configuration, then the delivered (new) fluid search page is displayed in its default state.
 - If configurable search is not enabled and a pivot grid configuration exists for the component, the pivot grid search page is displayed.
- If a component is not search enabled (that is, the component search record has no search keys and the Update/Display check box on the Use tab of the Component Properties dialog box is not selected), the transaction page is loaded directly, which is similar to the functionality prior to PeopleTools 8.60.

Using the Enable Configurable Search Check Box for Fluid Components

Application developers should note that to enable or disable configurable search for fluid components, you can use the **Enable Configurable Search** check box on the Fluid tab of the Component Properties dialog box in Application Designer. If you choose this route to enable configurable search, you have to deliver the component through a project. However, you should be aware that you do not have to use this route of delivering a component for configurable search because you can use the Manage Configurable Search page in browser to enable configurable search.

You may plan to deliver a component for some business requirements, and in that case you can enable configurable search on the component.

Note

If you plan to select the **Enable Configurable Search** check box on a delivered component, you should be aware that it might have future upgrade impact.

See Fluid User Interface Developer's Guide: Setting Properties on the Fluid Tab.

Considerations for enabling configurable search using the Enable Configurable Search check box:

- On existing components, if the **Search Page Type** field is set to None, the **Enable Configurable Search** check box is unavailable.
- If you set **Search Page Type** to Standard, the **Enable Configurable Search** check box is available for use.

Currently, only standard search page type is supported for configurable search.

- On new components, the **Enable Configurable Search** check box is selected by default provided the Search Page Type is set to Standard.

Creating Custom Search Pages

If you plan to create custom search pages, Oracle recommends that you clone the delivered search pages and then modify them.

When you create a custom search page, ensure that you specify the page type as **Search Page** on the Use tab of the Page Properties dialog box in Application Designer. You should insert the custom search page in a component and redeliver the component to make the custom search page available to your end-users who can interact with it.

You can create a custom search page and apply it for a single component or you can apply it system-wide, which can be specified on the PeopleSoft Options page.

See [Specifying System-wide Configurable Search Properties](#).

Working with Configurable Search

The implementation of configurable search requires you to specify system-wide search properties on the Configurable Search Options page and specify component content reference specific properties on the Manage Configurable Search page.

Specifying System-wide Configurable Search Properties

Use the Configurable Search Options page to specify system-wide configurable search properties.

You can also use this page to configure field labels and search attribute labels.

To specify configurable search properties at the CREF-level, use the Manage Configurable Search page. For more information, see [Configuring a Search Page](#).

Note

CREF-level configurable search properties specified for a configurable search page will overwrite system-level configurable search properties for that CREF.

Access the Configurable Search Options page by selecting **PeopleTools**, and then **Utilities**, and then **Administration**, and then **Configurable Search Options**.

This example illustrates the fields and controls in the Configurable Search Options page. Descriptions of the properties appear after the example.

Configurable Search Options

Save

Classic Search Page

Fluid Search Page

Maximum Number of Search results in Standard Search

Maximum Number of Search results in Keyword Search

Maximum Number of Recent Searches

Maximum Number of Saved Searches

Recent Search Format

☐ For Option Field Label with Value Example, Description:Manager. For option Field Label with Value and Operator Example, Description(Begins with):Manager.

Saved Search Format

☐ For Option User supplied name and field label with value Example, GBIBU Managers Business Unit:GBIBU, Description:Manager. For option User supplied name, field label with value and operator Example, GBIBU Managers Business Unit (Contains):GBIBU, Description (begins with):Manager

Columnar Display

Use Keyword Search when available ☐

☐ If search definition associated with a component is deployed, indexed and RTI is enabled, then use Keyword Search without relying on the existing component level setting.

Collapse Search Criteria after results displayed ☐

Show Related Actions in Search Results ☐

Include Image in Search Results ☐

Configure Field Labels

Field Name ¹	Field Label ¹	Records ¹
1		Records + -

Configure Search Attribute Labels

Search Attribute Name ¹	Search Attribute Label ¹	Search Definitions ¹
1		Search Definitions + -

Field or Control

Description

Classic Search Page

The search page that you specify here acts as the system-wide search page for classic components.

Clone the delivered classic search page, PTS_CFGSRCH_CL, to create a custom search page. However, you may create your own search page without cloning the delivered search page.

Fluid Search Page

The search page that you specify here acts as the system-wide search page for fluid components configurable search.

Clone the delivered fluid search page, PTS_CFGSRCH_FL, to create a custom search page. However, you may create your own search page without cloning the delivered search page.

Maximum Number of Search results in Standard Search

Specify the maximum number of search results that should be displayed while performing a standard search.

You can choose between 0 and 999.

The default value is 100.

Field or Control	Description
Maximum Number of Search results in Keyword Search	Specify the maximum number of search results that should be displayed while performing a keyword search. You can choose between 0 and 999. The default value is 50.
Maximum Number of Recent Searches	Specify the maximum number of recent searches that should appear in the recent search display area. You can choose between 0 and 999. The default value is 5.
Maximum Number of Saved Searches	Specify the maximum number of saved searches that can be stored for a component. You can choose between 0 and 999. The default value is 5.
Recent Search Format	Select a display option for recent searches: • Label value – Displays the name of the field and the value entered in the field. • Label operator value – Displays the name of the field along with the value entered in the field and the search operator.
Saved Search Format	Select a display option for saved searches: • Label value – Displays the name of the saved search along with the field name and the value entered in the field. • Label operator value – Displays the name of the saved search along with the field name and the value entered in the field along with the search operator.
Columnar Display	Specify whether search criteria should be displayed as a single or double column.
Use Keyword Search when available	Select this option to automatically turn on keyword search as the search type when the following conditions are met: • The search definition associated with the component is deployed and indexed and Real-Time Indexing is enabled. • CREF is not configured for the component.
Collapse Search Criteria after results displayed	Select to collapse the search criteria fields after search results are displayed.
Show Related Actions in Search Results	By default, related actions are not displayed in search results even if related actions are configured for the component. Select this option to display related actions for the components for which related actions are configured. See Configuring a Search Page .
Include Image in Search Results	Select this option to display images with search results.

Configuring Field Labels

On the Configurable Search Options page, use the Configure Field Labels section to override labels of the fields on CREFs that do not have Configurable Search enabled on the Manage

Configurable Search page. You have the option to apply the configured label either system-wide or to selected records only. Use the **Records** link to open a secondary page where you can apply the configured field label to specific records. If no record is selected, the configured field label will be used system-wide for all records that use the field.

Field or Control	Description
Field Name	Select a field to update its label.
Field Label	Enter a field label for the field.
Records	Select this link to apply the configured field label to selected records. This link opens a secondary page where you can choose the records to which the configured field label should be applied.

Configuring Search Attribute Labels

On the Configurable Search Options page, use the Configure Search Attribute Labels section to override labels for the fields on CREFs that have Configurable Search enabled on the Manage Configurable Search page. You have the option to apply the configured label either system-wide or to selected search definitions only. Use the **Search Definitions** link to open a secondary page where you can apply the configured search attribute label to specific search definitions. If no search definition is selected, the configured search attribute label will be used system-wide for all search definitions that use the search attribute.

Field or Control	Description
Search Attribute Name	Select a search attribute to update its label.
Search Attribute Label	Enter a search attribute label for the search attribute.
Search Definition	Select this link to apply the configured search attribute label to selected search definitions. This link opens a secondary page where you can choose the search definitions to which the configured search attribute label should be applied.

Managing Configurable Search Configurations

Use the Manage Configurable Search page to list configured content references, to add a new configuration, and to review, edit, or delete an existing configuration.

Access the Manage Configurable Search page by selecting **PeopleTools**, and then **Utilities**, and then **Manage Configurable Search**.

Note

Manage Configurable Search page requires the PTPORTALREGISTRY search definition, so you must ensure that the search definition is deployed and indexed.

This example illustrates the Manage Configurable Search page. Descriptions of the fields appear after the example.

Manage Configurable Search

New Content References

The search returns only content references. As soon as you choose a content reference, you will be redirected to configuration page.

Search Content References

Enter content reference label

Configured Searches

Filter

Enter path and/or label

Apply

Clear

Content References

1 row

Label 1:	Path 1:
User Profiles	PeopleTools > Security > User Profiles > User Profiles

New Content References

The New Content References section enables you to search for content references that you want to configure for configurable search. When you select a content reference, the Search Configuration page displays the details of the selected content reference if the following conditions are met:

- Add, or Update/Display, or both action modes are enabled on the Use tab of the Component Properties dialog box in Application Designer.
- Search record contains search keys.

See Application Designer Developer's Guide: Setting Component Properties.

If any of these conditions are not met, the system does not display the Search Configuration page, but displays the following error message: Search and Add modes are not enabled for component, cannot configure the content reference.

Configured Searches

The Configured Searches section lists the content references that have been configured for configurable search. You may edit the configuration or delete the configuration. The list of configured content references could be quite long, so you can use the filter option to identify the content reference you require.

Configuring a Search Page

Use the Search Configuration page to configure a search page and specify how the configured search page should appear for an end user to interact with when accessing the component.

Note

In the case of a component having multiple content references, the entered value is not applicable to other content references of the same component.

Note

System-level configured values are used as defaults in content reference-level configuration. When specified, CREF-level configurable search properties specified for a configurable search page will overwrite system-level configurable search properties for that CREF.

Access the Search Configuration page by selecting **PeopleTools**, and then **Utilities**, and then **Manage Configurable Search** and then selecting the content reference for which you want to configure a search page.

This example illustrates the Search Configuration page. Descriptions of the fields appear after the example.

Search Configuration

Portal Name

EMPLOYEE

*Status

Active

Preview

Save

Items Standard

Configurations

Search

Add New

*Effective Date

02/26/2025

Main Options

*Search Type

Keyword Search

*Search Definition

QE_NUI_ITM_NM

Search as default view

☒

Search Page Heading

Search Page Instructions

Advanced Options

*Configured Search Presentation

Basic and Advanced

① For Configured Searches, Basic is presented as "Fewer Options" and Advanced is presented as "More Options"

*Default Search Presentation

Basic

*Columnar Display

Double Column

Maximum Number of Recent Searches

5

Maximum:999

Recent Search Format

☒ Field label with value

☐ Field label with value and operator

① For Option Field Label with Value Example, Description Manager. For option Field Label with Value and Operator Example, Description(Begins with) Manager.

Maximum Number of Saved Searches

5

Maximum:999

Saved Search Format

☒ User supplied name and field label with value

☐ User supplied name, field label with value and operator

① For Option User supplied name and field label with value Example, GBIBU Managers Business Example, GBIBU Managers Business Unit (Contains) GBIBU, Description (begins with) Manager

Maximum Number of Search results

50

Execute Auto Search

☐

① Auto search shows pre-search results at launch

Collapse Search Criteria after results displayed

☐

① Once set, search criteria will be collapsed only when valid result is fetched

Show Related Actions in Search Results

☐

Small Form Factor Options

*Default Search Presentation

Basic

① Basic search on small form factor allows you to see one field and search by one field

Image Options

Include Image in Search Results

☐

Search Criteria and Result Options

Load Fields

9 rows

Search Criteria		Result Fields		Show All				
Attribute Name [†]	Attribute Label [†]	Modify Attribute Label [†]	Required [†]	Hidden [†]	Display Only [†]	Default Value [†]	Include in Criteria [†]	Criteria Sequence [†]
1 SETID	SetID	☐	☐	☐	☐	CRM01	☒	1
2 INV_ITEM_ID	Item ID	☐	☐	☐	☐		☒	2
3 QE_DESCR	Description	☐	☐	☐	☐		☒	3
4 INV_ITEM_GROUP	Item Group	☐	☐	☐	☐		☒	4
5 QE_CATEGORY_ID	Category ID	☐	☐	☐	☐		☒	5
6 QE_DATE_ADDED	Date Added	☐	☐	☐	☐		☒	6
7 QE_DESCRSHORT	Short Description	☐	☐	☐	☐		☒	7
8 QE_INV_PROD_FAM_CD	Family	☐	☐	☐	☐		☒	8
9 QE_UNIT_MEASUR_STD	Standard Unit of Measure	☐	☐	☐	☐		☒	9

Facets

2 rows

Facet Name [†]	Facet Label [†]	Modify Label [†]	Hidden [†]
1 INV_ITEM_GROUP	Item Group	☐	☐
2 QE_CATEGORY_ID	Category ID	☐	☐

Configure Links

1 row

PeopleTools Quality > QE PIA Search > Items Standard	Order of Appearance	Open in New Window	*Link Label	Delete
PeopleTools Quality > QE PIA Search > Items Standard	1	☒	Items Standard	

Add Link

Field or Control	Description
Status	If you select Active, the search configuration is applied to the content reference and the configured search page is displayed based on conditions, which are described in the guidelines topic. See Guidelines on Using Configurable Search for Classic Components and Guidelines on Using Configurable Search for Fluid Components. If you select Inactive, the search configuration is not applied to the content reference and the system displays the search page specified in the component.
Preview	Use the Preview button to view the configured search page. It opens a new window to display the newly configured search page. In the case of multiple effective-dated configurations for a content reference, selecting the Preview button displays the current effective-dated configuration.
Effective Date	PeopleSoft's effective-dating logic enables you to configure an effective-dated configuration for a future date. You can configure multiple effective-dated configurations for a content reference and use the effective-dating logic to enable the configuration on a future date. For example, you could configure two configurations for a content reference. While one configuration is based on keyword search and is set for a future date, the other configuration can be based on standard search and set for current effective date. Or you could set any of the configurable options and specify a future date for the configuration. Use the plus sign (+) to create a new search configuration for the content reference to which you can apply effective-dating logic. See Applications User's Guide: Using Effective Dates.
Search or Add New	The Search Configuration page displays the Search or Add New, or both tabs based on the configuration of the selected component. That is, if the Update/Display action mode is selected on the Component Properties page, the Search tab appears and if the Add action mode is selected, the Add New tab appears. While the Search tab displays the Search Configuration page, the Add New tab displays the Add Configuration page. Search is the default tab.

Main Options

Field or Control	Description
Search Type	The system displays the search type configured for the component. The following options are available: • Keyword Search: Uses a search definition to perform a search. • Standard Search: Uses a search record to perform a search. If you select a content reference that has a component mapped to a search definition and real-time indexing is enabled, then the default search type is Keyword Search. However, you can change the search type to Standard Search and specify a search record for it.
Search Record or Search Definition	The Search Record or Search Definition field appears based on the search type. The Search Record field displays the search record specified on the Component Properties page. However, you may specify a different search record for the content reference. In this case, the search record specified on the Search Configuration page is used when a user accesses this content reference provided the status of this configuration is set to active. If the status is set to inactive, the search record specified on the Component Properties page is used. The Search Definition field displays the search definition mapped to the component. Similarly, if a search definition mapped to a component is enabled for real-time indexing, this field displays the search definition, which is enabled for real-time indexing. If a search definition is not mapped to a component, the field is blank. You may specify a different search definition for the content reference, but you should ensure that the search definition is mapped to the component. If you select an unmapped search definition, the following error message displays: Search definition is not mapped to component. See Mapping Components to Search Definitions.
Search as default view	Use this option to specify whether search should be the default view. If you enable this feature, search will be the default view and Add as the default view is automatically disabled. When a component is configured for Search and Add action modes, you can set only one action mode as the default view.

Field or Control	Description
Search Page Heading	Specify a heading that will appear at the top of the search page. The heading should not exceed 100 characters. If you do not specify a page heading, the page displays the default heading, Find an Existing Value .
Search Page Instructions	Enter instructions for an end-user, for example information on how to complete the process.

Advanced Options

Field or Control	Description
Configured Search Presentation	Valid values for search lookup type: • Advanced • Basic • Basic and Advanced Default search lookup type is Basic and Advanced. For descriptions of search lookup types, see Applications User's Guide: Understanding Search Pages.
Default Search Presentation	This field appears when you select the Basic and Advanced option in the Configured Search Presentation field. Valid values for default search presentation: • Advanced • Basic See Applications User's Guide: Understanding Search Pages.
Columnar Display	Specify whether search criteria should be displayed as a single or double column.
Maximum Number of Recent Searches	This field displays the value specified on the Configurable Search Options page. The default value is 5. However, you may specify the number of recent searches that should appear in the Recent Search Display area. Valid values are 0 to 999. The value entered here is applicable to the selected component and overrides the system-wide configurable search property.
Recent Search Format	Select a display option for the recent search: • Field label with value - Displays the name of the field and the value entered in the field. • Field label with value and operator - Displays the name of the field along with the value entered in the field and the search operator.

Field or Control	Description
Maximum Number of Saved Searches	This field displays the value specified on the Configurable Search Options page. The default value is 5. However, you may specify the number of saved searches that should appear in the Saved Searches area. Valid values are 0 to 999. The value entered here is applicable to the selected component and overrides the system-wide configurable search property.
Saved Search Format	Select a display option for a saved search: • User supplied name and field label with value - Displays the name of the saved search along with field name and value entered in the field. • User supplied name, field label with value and operator - Displays the name of the saved search and field name and the value entered in the field along with the search operator.
Maximum Number of Search Results	This field displays the value specified on the Configurable Search Options page. The recommended values for keyword search and standard search are 50 and 100, respectively. Specify the maximum number of search results to display. The value entered here is applicable to the selected component content reference and overrides the system-wide configurable search property.
Execute Auto Search	Select this option to display pre-search results based on the most recent search criteria. For initial auto search results, default search criteria is used. Subsequently, the most recent search criteria is used.
Collapse Search Criteria (applicable when the Search Type is set to Standard Search)	Select this option to collapse the search criteria fields. However, search criteria is collapsed after search results are fetched.
Collapse Search Criteria after results displayed (applicable when the Search Type is set to Keyword Search)	Select to collapse the search criteria fields after search results are displayed.
Show Related Actions in Search Results	By default, related actions are not displayed in search results even if related actions are configured for the component. To display related actions, you should ensure that related actions are configured for the component and enable this option .
Small Form Factor Options	
Field or Control	Description
Default Search Presentation	Specify the default lookup search for small form factor devices.

Image Options

Field or Control	Description
Include Image in Search Results	Specify whether to display an image with the search results. When you enable this option, two fields are displayed to provide the record and field information.
Source Record	The source record keys should be keys in the search record.
Source Field Name	Select a field of the record.

Search Criteria and Result Options

Select the Load Fields button to display the fields of the configured search record (standard search) or attributes of the configured search definition (keyword search).

The Search Criteria tab enables you to configure the appearance of fields or attributes and the sequence in which they should appear on the search page.

Field or Control	Description
Field Name or Attribute Name	Lists the fields of the configured search record for standard search or the attributes of the configured search definition for keyword search.
Field Label or Attribute Label	Lists the labels of the fields or attributes.
Modify Field Label or Modify Attribute Label	Select this option, which enables you to edit the field or attribute label.
Required	Specify whether the field or attribute should be marked as a required field on the search page. The Required button for a corresponding record field is <i>not</i> enabled if the Required check box (on the Edits tab) and the Search Edit check box (on the Use tab) are selected in the Record Field Properties page in Application Designer. However, the Required button is enabled if the Required check box or the Search Edit check box is <i>not</i> selected in the Record Field Properties page. If you select the Required button, the Include in Criteria button is automatically selected if it was not previously selected. If you deselect the Required button, the Include in Criteria button is not automatically deselected.
Hidden	Specify whether the field or attribute should be hidden on the search page. You can set a field or attribute as hidden if the field or attributes has a default value associated with it.

Field or Control	Description
Display Only	Specify whether the field or attribute should be display only. You can set a field or attribute as display only if the field or attribute has a default value associated with it.
Default Value	Lists the default value for a field or attribute if configured.
Include in Criteria	Specify whether the field or attribute should be used as search criteria on the search page. The Include in Criteria button corresponding to a record field is <i>not</i> enabled if the Required check box (on the Edits tab) and the Search Edit check box (on the Use tab) are selected in the Record Field Properties page in Application Designer. However, the Include in Criteria button is enabled if the Required or the Search Edit check box is <i>not</i> selected in the Record Field Properties page. If you deselect the Include in Criteria button, the Required button is automatically deselected if it was previously selected.
Criteria Sequence	Specify the sequence in which the fields or attributes should be displayed on the search page. A field or attribute with the lowest numeric value is displayed at the top.
Field Appearance in or Attribute Appearance in	Specify the search presentation for each field or attribute. For standard search, the default search presentation is Basic and Advanced. Note: For Keyword Search, this field is only available when the Configured Search Presentation is set to Advanced .

The Result Fields tab enables you to configure the appearance of fields or attributes and the sequence in which they should appear on the search results page.

Field or Control	Description
Include in Results	Specify whether the field or attribute should be displayed in search results.
Include in Small FF	Specify whether the field or attribute should be displayed in search results on small form factor devices.
Results Sequence	Specify the order in which the fields or attributes should appear on search results. The field or attribute with the lowest numeric value appears from left to right.

The Show All tab displays a combined list of configurable fields from the Search Criteria and Result Fields tabs.

Facets

For search type Keyword Search, you can modify the **Facet Label** or hide a facet, or both, using the Facets section in the Manage Configurable Search page.

Field or Control	Description
Facet Name	Displays the name of the facet.
Facet Label	Displays the current label used for the facet.
Modify Label	Select to make the Facet Label column editable and modify the facet label.
Hidden	Select to hide the facet. from the search results page.

Configure Links

Select the Add Link button to launch the Configure a link dialog where you can specify a content reference that will appear on the search page. This functionality enables you to provide links to other components that are relevant to the current component or the next task a user needs to perform.

Field or Control	Description
Order of Appearance	Specify the sequence in which the configured links should appear when you configure multiple links on the search page.
Open in New Window	Specify whether the configured content reference should appear in a new window. If you select No, the content reference opens in the current window.
Link Label	Enter the label for the content reference.

After completing the configuration, save the changes. Use the Preview button to preview the new page, which opens a new window to display the newly configured page.

Configuring an Add a New Value Page

Use the Add Configuration page to configure a page to add a new value to the PeopleSoft table and specify how the page should appear for an end user.

Click Add New on the Search Configuration page.

This example illustrates the Add Configuration page. Descriptions of the fields appear after the example.

Add Configuration

Portal NameEMPLOYEE

StatusActive

User Profiles

Save

Configurations

Search

Add New

Effective Date09/09/2022

Main Options

*Search RecordPSOPRDEFN_SRCH

Add as Default ViewNo

Add Page Heading

Add Page Instructions

Configure Criteria

Load Fields

Field Name	Field Label	Modify Field Label	Required	Hidden	Display Only	Included in Criteria	Sequence	Default Value
1 OPRID	User ID	No	Yes	No	No	Yes	1	
2 OPRDEFNDESC	Description	No	No	No	No	No		

Add button override

Package Name

Path

Class Name

Method

Configure Links

PeopleTools > Security > Permissions and Roles > Permission Lists	Order of Appearance	Open in New Window	*Link Label	Delete
PeopleTools > Security > Permissions and Roles > Permission Lists	1	Yes	Permission Lists	

Add Link

Field or Control	Description
Status	The status specified on the Search Configuration page is extended to the Add Configuration page. Therefore, you cannot set or edit the status on this page.

Main Options

Field or Control	Description
Search Record	The Search Record field displays the search record specified on the Component Properties page. However, you may specify a different search record for the content reference. In this case, the search record specified on the Search Configuration page is used when a user accesses this content reference provided the status of this configuration is set to active. If the status is set to inactive, the search record specified on the Component Properties page is used. If the search record does not contain a key or keys, the Load Fields button is disabled. Choosing a search record that contains a key or keys enables the Load Fields button.

For descriptions of the fields in the Configure Criteria and Configure Links areas, which are similar to the Search Configuration page, see [Configuring a Search Page](#).

Configure Criteria

Select the Load Fields button to display the fields of the configured search record (standard search) or attributes of the configured search definition (keyword search).

The Configure Criteria group box enables you to configure the appearance of fields or attributes and the sequence in which they should appear on the Add a New Value page.

Field or Control	Description
Field Name	Lists the fields of the configured search record for standard search or the attributes of the configured search definition for keyword search.
Field Label	Displays the labels of the fields or attributes.
Modify Field Label	Set this option to Yes, which enables you to edit the field or attribute label.
Required	Specify whether the field or attribute should be marked as a required field on the Add a New Value page. The Required button for a corresponding record field is <i>not</i> enabled if the Required check box (on the Edits tab) and the Search Key are selected in the Record Field Properties page in Application Designer. However, the Required button is enabled if the Required check box or the Search Key is <i>not</i> selected in the Record Field Properties page. If you select the Required button, the Include in Criteria button is automatically selected if it was not previously selected. If you deselect the Required button, the Include in Criteria button is not automatically deselected.
Hidden	Specify whether the field or attribute should be hidden on the Add a New Value page. You can set a field or attribute as hidden only if the field or attribute has a default value associated with it.
Display Only	Specify whether the field or attribute should be display only. You can set a field or attribute as display only if the field or attribute has a default value associated with it.

Field or Control	Description
Include in Criteria	Specify whether the field or attribute should be used as search criteria on the Add a New Value page. The Include in Criteria button corresponding to a record field is <i>not</i> enabled if the Required check box (on the Edits tab) and the Search Key check box (on the Use tab) are selected in the Record Field Properties page in Application Designer. However, the Include in Criteria button is enabled if the Required check box or the Search Key check box is <i>not</i> selected in the Record Field Properties page. If you deselect the Include in Criteria button, the Required button is automatically deselected if it was previously selected.
Sequence	Specify the sequence in which the fields or attributes should be displayed on the Add a New Value page.
Default Value	Lists the default value for a field or attribute if configured.

Add Button Override

Use the Add button override area to override the behavior of the Add button. Specify an application class or method for the target component where you want to redirect the user when they select the Add button.

Field or Control	Description
Package Name	Specify the root package where the application class is created.
Path	Specify the path, represented by a colon (:).
Class Name	Choose the relevant application class.
Method	Specify the method to be invoked.

Configure Links

Select the Add Link button to launch the Configure a link dialog where you can specify a content reference that will appear on the Add a New Value page. This functionality enables you to provide links to other components that are relevant to the current component or the next task a user needs to perform.

Field or Control	Description
Order of Appearance	Specify the sequence in which the configured links should appear when you configure multiple links on the search page.
Open in New Window	Specify whether the configured content reference should appear in a new window. If you select No, the content reference opens in the current window.
Link Label	Enter the label for the content reference.

After completing the configuration, save the changes. Use the Preview button to preview the new page, which opens a new window to display the newly configured page.

Working With Saved Searches

Configurable search enables you to save your search criteria in the database for later use. You can then select any of the saved searches to auto populate the search criteria field values from the stored values and perform the search.

For more information about entering and saving search criteria, see Applications User's Guide: Entering and Saving Search Criteria.

Adding Saved Searches to Favorite Searches

You can group your saved searches based on your business requirements and access them from a centralized list in the My Favorite Searches page.

The Favorite Searches feature is enabled by default. This feature can be disabled by a user with an administrator role using the PeopleTools Options page. For more information, see System and Server Administration: PeopleTools Options.

Note

The maximum number of saved searches that a user can add to the My Favorite Searches page is set to 10 by default. Administrators can configure the maximum number of saved searches for a user using the PeopleTools Options page. For more information, see System and Server Administration: PeopleTools Options.

Adding a New Saved Search to Favorite Searches

You can add a new search to favorites while saving the search using the Save Search dialog box. For more information about entering and saving search criteria, see Applications User's Guide: Entering and Saving Search Criteria.

Select the **Save Search** button on a configurable search page to access the Save Search dialog box. To add the new search to favorites, select the **Add to Favorite** check box. You then have the option to add the search to an existing group or to create a new group for the search.

This example illustrates the properties for the Save Search dialog box. Descriptions of the properties appear after the example.

Cancel

Save Search

Save

Name

Criteria

SetID

CRM01

Item Group

REFRIGERATOR

Favorite Searches

Add to Favorite

✓

Add to existing group

Create New Group

Field or Control	Description
Name	Enter a name for the new search. You must enter a unique name for the search.
Criteria	Displays the criteria that you had specified for the search.
Add to Favorite	Select this option to add the search to favorites and then select one of the following options to add it to a group: - Add to existing group – Select this option to add the search to an existing group. The existing groups are available in a drop-down list. - Create New Group – Select this option to create a new group and add the search to the group. You must enter a unique name for the new group.

Adding an Existing Saved Search to Favorite Searches

You can add an existing saved search to favorites using the Manage Saved Search dialog box.

From any configurable search page, use the pencil icon for the **Save Search** edit box to display the Manage Saved Search dialog box. From this dialog box, you can add an existing saved search to favorites, rename a saved search, or delete a saved search.

On the Manage Saved Search dialog box, select the **Add to Favorite** check box to access the Save Search dialog box. Then add your existing saved search to favorites using the Save Search dialog box. For more information, see the previous section in this topic, Adding a New Saved Search to Favorite Searches.

This example illustrates the properties for the Manage Saved Searches dialog box. Descriptions of the properties appear after the example.

Saved Searches	Add to Favorite	Favorite Search Group	Rename	Delete
PT_User: User ID(BGN):PT	☒	User Profiles		
Admin_User: Description(CT):Administrator	☒	User Profiles		
Administrator: Description(CT):Administrator	☐			

Field or Control	Description
Display By	Use this drop-down list to select the display order of the saved searches. Select one on the following options: - Alphabetically – Select this option to display the saved searches in alphabetical order. - Newest on top – Select this option to display the saved searches by their creation dates, with the newest saved search displayed on top. - Oldest on top – Select this option to display the saved searches by their creation dates, with the oldest saved search displayed on top.
Delete All	Select this link to delete all the saved searches for the search page.
Saved Searches	Displays the name of the saved search.
Add to Favorite	Select this option to add the saved search to favorites. When you select this option, the Save Search dialog box appears. For more information, see the previous section, Adding a New Saved Search to Favorite Searches, in this topic.

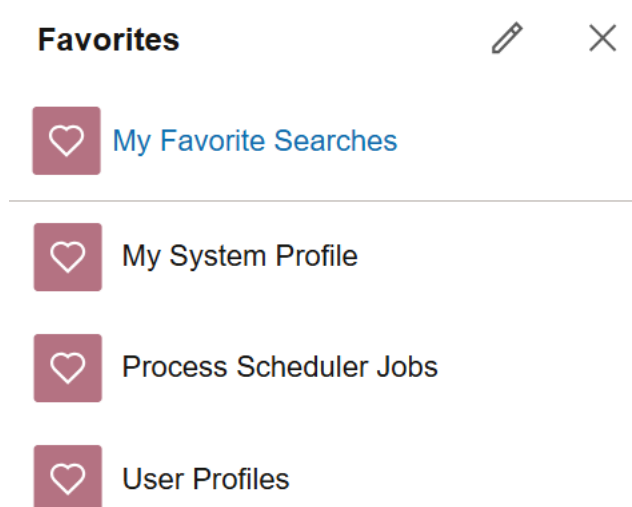
Field or Control	Description
Favorite Search Group	Displays the name of the favorite search group in which the saved search is saved/stored.
Rename	Select to open the Rename dialog box where you can rename the saved search.
Delete	Select to delete the saved search.

Viewing Favorite Searches

The My Favorite Searches page is a centralized page that lists all your favorite saved searches and groups. You can also use this page to refresh the search result count of the saved searches.

To access the My Favorite Searches page, select the **Favorites** icon on the banner and then select the **My Favorite Searches** link.

This example illustrates the **My Favorite Searches** link that is available under **Favorites** in the banner.



You can also access the My Favorite Searches page from the NavBar. To access this page from the NavBar, select the Favorites tile on the NavBar, and then select the My Favorite Searches link. For more information, see Applications User's Guide: Working with Favorites.

The maximum number of saved searches that can be added to the My Favorite Searches page for a user is set to 10 by default. Administrators can configure the maximum number of saved searches for a user using the PeopleTools Options page. For more information, see System and Server Administration: PeopleTools Options.

This example illustrates the fields and controls on the **My Favorite Searches** page. Descriptions of the fields and controls appear after the example.

My Favorite Searches

Items Display Order

Alphabetical

[Manage Favorite Searches](#)

Jobs

Budget (6)

Last updated on 02/10/2025

Inventory (4)

Last updated on 02/10/2025

User Profile

PS_User (4)

Last updated on 02/17/2025

User Role PT (15)

Last updated on 02/17/2025

Field or Control	Description
Item Display Order	Select one of the following options from the drop-down list to specify the display order of the saved search items: - Alphabetical – Select this option to display the saved search items in alphabetical order. - Recently Updated – Select this option to display the saved search items according to their last updated dates, with the most recently updated saved search displayed on top. - User Defined – Select this option to display the saved search items in the same order that they are specified in the Manage Favorite Searches page. See Managing Favorite Searches. Note:User defined ordering of the items is not available in a cluster environment.
Manage Favorite Searches	Select this link to open the Manage Favorite Searches page. See Managing Favorite Searches.
	Select this button to refresh the search result count for the saved search.

Managing Favorite Searches

The Manage Favorite Searches page lists all the saved groups and saved searches that are available in the My Favorite Searches page and enables you to reorder them. The **User Defined** item display order in the My Favorite Searches page displays the saved searches and groups in the same order that they appear in the Manage Favorite Searches page.

You can also use this page to create new groups, move your saved searches to a different group, and delete groups and saved searches.

 Note

The Manage Favorite Searches page only displays local search items; that is, saved searches and groups that are stored in the local content system or database. This page does not have access to remote search items. To manage such items, you must access the content system or database where the remote items reside.

This example illustrates the properties for the Manage Favorite Searches page. Descriptions of the properties appear after the example.

Manage Favorite Searches

New GroupSave

Jobs

Budget

↓

Inventory

↑

User Profile

User Role PT

↓

PS_User

↑

Field or Control	Description
New Group	Select this link to open the Add New Group dialog box and create a new group. You must enter a unique name for the new group.
(Group Actions)	Select this menu to perform one of the following actions for the group: - Rename – Select to open the Rename dialog box and rename the group. - Move to the Top – Select to move the group to the top of the page. This option is not available for the group that appears at the top of the page. - Move to the Bottom – Select to move the group to the bottom of the page. This option is not available for the group that appears at the bottom of the page. - Move After Group – Select to move the group after another group. - Delete Group – Select to delete the group.

Field or Control	Description
 (Item Actions)	Select this menu to perform one of the following actions for the saved search item: - Move to other Group – Select to move the saved search item to another group. - Delete Item – Select to delete the saved search.
	Select this button to move the saved search item down one row within the group.
	Select this button to move the saved search item up one row within the group.

Refreshing Favorite Searches

The Refresh Favorite Searches page enables you to refresh your favorite saved searches in a batch.

Access the Refresh Favorite Searches page by selecting **PeopleTools**, and then **Utilities**, and then **Refresh Favorite Searches**.

This example illustrates the properties for the Refresh Favorite Searches page. Descriptions of the properties appear after the example.

Refresh Favorite Searches

New Window

Help

Personalize Page

Run Control ID: QE_TEST

Report Manager

Process Monitor

Run

Favorite Searches Processing Criteria

☐ Process all Favorite Searches

☐ Delete Invalid/Inactive Searches

☐ Process Favorite Searches created in last days

☐ Process Favorite Searches not refreshed in last days

Save

Field or Control	Description
Run Control ID	Displays the Run Control ID for the batch process.
Report Manager	Select this link to open the Report Manager page. See Applications User’s Guide: Viewing Reports in Report Manager.

Field or Control	Description
Process Monitor	Select this link to open the Process Monitor page. See Process Scheduler: Viewing the Status of Processes. You can use the Message Log link in the Process Monitor page to review the execution time for the batch process.
Process all Favorite Searches	Select to refresh the search result count for all favorite searches.
Process Favorite Searches created in last 'x' days	Select to refresh the search result count for all favorite searches created within a specified number of days in the past.
Process Favorite Searches not refreshed in last 'x' days	Select to refresh the search result count for only those favorite searches which were not refreshed within a specified number of days in the past.
Delete Invalid/Inactive Searches	Select to delete all invalid and inactive saved searches. Saved search items are considered invalid or inactive if: • User does not have access to the transaction component. • Search Type of the component is different from the saved search item search type. • User permission has been revoked for the My Favorite Searches component for this user. In this case, all the items for this user will be deleted. • The search criteria for a saved search item becomes invalid. Note: Saved search data is not deleted if you select this option.
Run	Select this button to run the batch process.

Upgrade Considerations

After upgrading to PeopleTools 8.60 and later, you should be aware of the changes on search pages that will occur and follow the guidelines to apply configurable search to components.

- On classic components, existing custom search pages with the Standard search page type are not replaced.

For guidelines on using configurable search in classic components, see [Guidelines on Using Configurable Search for Classic Components](#).

- On fluid components:
 - By default, on existing fluid components, the search pages are not replaced with the new fluid search page delivered in PeopleTools 8.60. You should explicitly enable configurable search for fluid components.
 - The existing custom search pages are not replaced.
 - By default, new fluid components use the new fluid search page delivered in PeopleTools 8.60.

- On a component definition (Fluid tab), you can use the Enable Configurable Search check box to enable or disable configurable search, see [Guidelines on Using Configurable Search for Fluid Components](#), Using the Enable Configurable Search Check Box for Fluid Components.

For guidelines on using configurable search in fluid components, see [Guidelines on Using Configurable Search for Fluid Components](#).

- PeopleTools 8.60 and later supports components that use the HCM delivered configurable search. If you want to use the PeopleTools delivered configurable search for a component (or content reference), you should deactivate the HCM delivered configurable search for that component:
 1. Set the status of search configuration for the component or content reference in the HCM application to inactive.
 2. Navigate to **PeopleTools**, and then **Portal**, and then **Event Mapping**, and then **Event Mapping Configuration**, select the content reference (component), and then remove the event mapping for SearchInit PeopleCode.

When you perform step 1, step 2 may not be necessary. However, it is recommended that administrators ensure that SearchInit PeopleCode for that component is removed by performing step 2.

Migrating Search Page Configuration Data Using Application Data Sets

Oracle delivers Application Data Sets (ADS) definitions to copy or migrate configurable search configuration data from one database to another.

For information on using ADS, see Lifecycle Management Guide: Understanding ADS Projects.

PTS_CFGSRCH

Oracle delivers the ADS definition PTS_CFGSRCH for Configurable Search.

The following table lists the Record Names:

Record Name	Description
PS_PTS_SRCH_ASGN	You can query this table to check whether configuration exists for a particular CREF or not; returns value 'A' if active configuration exists, otherwise returns 'I'.
PTS_CSRCH_FCT	Stores facet configurations for keyword search.
PTS_CSRCH_FCT_L	
PS_PTS_SRCH_DEFN	
	Common table that stores some of the information about search and add configurations.
	You can query this table to get information about configured search record/definition, add search record, page title and instructions, maximum number of recent and saved searches, display view options etc.

Record Name	Description
PS_PTS_SRCH_DTL_S PS_PTS_SRCHDTL_S_L	Stores search criteria fields for standard search.
PS_PTS_ADD_DTL PS_PTS_ADD_DTL_L	
PS_PTS_SRCH_DTL_E PS_PTS_SRCHDTL_E_L	Stores information about add page fields and their configuration.
PS_PTS_LINK_DTL_A PS_PTS_LINK_DTL_S	
PS_PTS_LINKDTL_A_L PS_PTS_LINKDTL_S_L	Stores search criteria fields for keyword search.
PS_PTS_SRCH_DEF_L	
	Stores links configured for particular CREF on the Add or Search page.
	Related language table for page title and page instructions.

PTS_CSRCH_OPTN

Oracle delivers the ADS definition PTS_CSRCH_OPTN for Configurable Search Options.

The following table lists the Record Names:

Record Name	Description
PTS_CSRCH_OPTN	Stores all system configuration values.

Working with PeopleSoft Search

Understanding PeopleSoft Search

PeopleSoft Search refers to the set of features that PeopleSoft application end users access to submit search requests against a search engine. The PeopleSoft Search interfaces depend on:

- the Search Framework being completely configured.
- the PeopleSoft search definitions and categories deployed to the search instance.
- the search indexes are populated.

These are the PeopleSoft Search features:

Feature	Description
Global Search	Provides users a Global Search bar appearing in the header of the PeopleSoft browser session where users can select relevant search categories against which to run searches.
Search Pages	When a user accesses a component, they use Search Pages to enter search keys to isolate the desired rows of data. Search Pages come in these formats: Find an Existing Value Search (or Standard Search) and Keyword Search. Find an Existing Value Search refers to the traditional component search, where users enter level 0 search keys running directly against the database. You do not need to configure Search Framework for the Find an Existing Value search to be available Keyword Search enables more free-form searches against a search engine index. In fluid user interface, keyword search and master-detail search is available, which can be configured as tiles to launch search in a component. While keyword search is against a search engine index, the master-detail search is configured in Pivot Grid.

PeopleSoft Search Framework features that are key to enhancing user experience are:

Feature	Description
Facets	Facets filter and narrow search results by ordering search results by categories, which are the fields you have selected to be facets in the search definition. These are similar to Google's left-hand, navigational search facets, for example.

Feature	Description
Search Groups	Search groups enable you to specify search categories to become available for display in the Global Search Bar. (Applies only to Global Search).
Search Contexts	Search contexts enable you to configure when a search group is available in the Global Search Bar. PeopleSoft Search Framework supports only the Homepage context. (Applies only to Global Search).

Working with Search Pages

This section provides an overview of working with search pages.

Understanding Search Pages

Configurable search enables you to configure the presentation of the delivered search pages for classic and fluid components. The search pages for PeopleSoft application components (classic and fluid) provide these options:

- Find an Existing Value (Standard search).
- Add a New Value.
- Keyword Search.

Note

Configurable search does not support a combination of standard search and keyword search for a component. For a list of supported combinations, see [Considerations for Using Configurable Search](#).

The PeopleTools delivered classic search page is displayed for classic components, by default. However, for fluid components, you need to specifically enable the delivered fluid search page for individual components or system-wide.

See [Understanding Configurable Search](#).

This example illustrates the fields and controls on the Classic PeopleSoft Application Component Search. You can find definitions for the fields and controls later on this page.

Departments

Find an Existing Value ⊕ Add a New Value

Search Criteria

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

🕒 Recent Searches Choose from recent searches ✎

🔖 Saved Searches Choose from saved searches ✎

Search by: Set ID = SHARE

Show more options

☐ Case Sensitive ☐ Include History ☐ Correct History

Search Clear



Nothing yet
Your search results will appear here

While the Find an Existing Value page enables end users to find the rows of data they need to view or modify, it is limited to running searches only across level 0 fields. The Find an Existing Value search runs against the live data tables, the component search record, not a search engine index.

Using the Keyword search page, end users can perform a deeper, more free-form search against the data. The Keyword search runs across the indexed values stored on the search engine server, which contains fields across all scroll levels.

Note

The Keyword Search page only appears if a search index has been associated with the component in a search definition. Because the keyword search runs against the indexed data, depending on the frequency of index builds, the indexed data may not entirely match the Find an Existing Value search results. You can ensure that the indexed data is near real time by enabling real-time indexing for the mapped search definition.

For information on real-time indexing, see [Configuring Real-Time Indexing](#).

This example illustrates the fields and controls on the Keyword search page. You can find definitions for the fields and controls later on this page.

Search Job Data

[New Window](#) | [Help](#)

Find an Existing Value

[+ Add a New Value](#)

▼ Search Criteria

Note: Search will return results last updated 3 minutes ago (10/16/2023 02:05:21AM).
Enter any information you have and click Search. Leave fields blank for a list of all values.

Keywords

Search



▼ Show more options



Nothing yet
Your search results will appear here

The search pages that display after you've enabled Keyword search for a component are:

- **Keyword Search:** This page enables the user to run free-text searches using the Keywords edit box. Implementation teams can index any attributes that they would like the end user to be able to search.
- **Add a New Value:** This is the same interface as the Add a New Value page used in previous PeopleSoft releases, which enables you to add new rows to PeopleSoft tables.

If the search server is down, search definition is not deployed, or search definition is not indexed, the system automatically displays the standard search instead of the keyword search and displays the following error message:

Error	Possible Cause	Resolution
Keyword Search is unavailable at this time - Error "Keyword Search is down". Transferred to Standard Search until the issue is resolved.	Search server is down or not available.	Contact your Search Administrator.
Keyword Search is unavailable at this time - Error Search Definition is not Deployed. Transferred to Standard Search until the issue is resolved.	Search definition is not deployed.	Contact your Search Administrator.
Keyword Search is unavailable at this time - Error Search Definition is not Indexed. Transferred to Standard Search until the issue is resolved.	Search definition is not indexed.	Contact your Search Administrator.

Recent and saved searches are displayed based on search type. For example, if you have saved some searches in keyword search and the page is switched to standard search, then it doesn't show the keyword search page's recent and saved searches. Similarly, when the issue is resolved and the keyword search is available, you notice that recent and saved searches from the standard search don't appear on the keyword search.

Enabling Keyword Search

To enable Keyword Search display when users access a component, you use the Component Mapping page in the Search Definition component for the Search Framework Designer. The Component Mapping page enables you to map a component to a specific search definition to enable search engine integration with Search Pages.

Note

Search definitions mapped to a component use document level security. This is enforced by the Search Designer activity guide.

For components that have been added to the grid on the Component Mapping page for a search definition, the search page for that component displays the Search Framework search options. The keyword Search Framework feature enables the user to search deeper (level 0-3) by running a free-formed search against crawled and indexed values in the search engine. The keyword search is powerful because it allows you to search across all fields in an index rather than just inside a specific set of fields defined in the search record.

When the search definition is deployed, the system updates the component meta data to indicate the search category to which the component is mapped. When the system renders the page, it displays the keyword search page for that component.

Note

Multiple components can be mapped to the same search definition.

To enable search pages for a component:

1. Select **PeopleTools**, and then **Search Framework**, and then **Search Designer Activity Guide**, and then **Search Definition** and open the desired search definition.
2. Select the Component Mapping tab.
3. Add the desired component to the grid.
4. Update the security restrictions and access appropriately.
5. Save the search definition.
6. Deploy or update the search definition to the search engine.
7. Navigate to the component and verify that you see the Keyword search page.

Related Topics

- [Mapping Components to Search Definitions](#)
Access the Component Mapping page by selecting **PeopleTools**, and then **Search Framework**, and then **Search Designer Activity Guide**, and then **Search Definition** and selecting the Component Mapping tab. The Component Mapping page enables you to map a component to a specific search definition to enable the search engine integration with Search Pages.

- [Setting Document Level Security](#)
Access the document-level security settings by selecting the Document Level Security radio button. Document-level security can also be thought of as attribute-based security.

Developing for Search Pages

This section describes these items to consider while implementing Search Pages.

- Setting component properties for search pages.
- Working with Find an Existing Value and Keyword Search behavior differences.
- Working with Keyword Search data currency.
- Requirements for Keyword Search.

Setting Component Properties for Classic Search Pages

You configure properties for your search pages in the Component Properties dialog box in PeopleSoft Application Designer. On the Internet tab, in the Search Page group box there are numerous settings related to your application search pages. These settings apply specifically to the Keyword search page:

Field or Control	Description
Primary Action (Keyword Search)	Enables you to set the primary action of the component to display the Keyword Search page.
Default Search\Lookup Type (Keyword Only)	Enables you to set the default look up type to be used on the Keyword Search page.
Link to Realtime Search Page	Specifies the message set and number that stores the text displayed for the Find an Existing Value link in the Add a New Value tab and Keyword Search tab <i>if</i> Keyword Search is enabled.
Link to Keyword Search Page	Specifies the message set and number that stores the text displayed on the Add a New Value tab and Find an Existing Value tab <i>if</i> Keyword Search is enabled.

① Note

The Link to Keyword Search Page value only applies if Keyword Search is enabled for that component.

The Link to Realtime Search Page value applies to all components that use the PeopleTools search page, even if Keyword Search is *not* enabled.

Note

The term, *Realtime*, is used to differentiate between the currency of the data between the Find an Existing Value search and the Keyword search. While the Find an Existing Value search displays search results that are always a current reflection of the data in the database, the Keyword Search is only as current as the last index build or incremental index update. However, you can ensure that the indexed data is near real time by enabling real-time indexing for the component.

When implementing the Keyword search feature, make sure to adjust these settings accordingly. The general concepts surrounding these settings, along with other component properties, are discussed in the PeopleSoft Application Designer documentation.

See Application Designer Developer's Guide: Setting Internet Properties.

Setting Component Properties for Fluid Search Pages

Similar to classic search pages, you configure properties for your Fluid search pages in the Component Properties dialog box in PeopleSoft Application Designer. On the Fluid tab, in the Search Type field, select either None, Standard, or Master/Detail.

See Fluid User Interface Developer's Guide: Implementing Search for Fluid Components.

Working with Find an Existing Value and Keyword Search Behavior

Find an Existing Value or Standard search and Keyword search types have the same, general look and feel, however, these differences and features should be noted:

- With the Find an Existing Value search, the end user selects values based on the underlying record search keys and clicks Search. Results are rendered in a standard grid format, as seen in all previous PeopleSoft versions.
- With the Keyword search, the end user enters values into the Keywords edit box and clicks Search. The end user can also enter a combination of keywords in addition to using the provided search keys. The system runs this search against the search engine index. Results can be displayed in either a grid or a list format.
- The Keyword search will show facets, while the Find an Existing Value search cannot.
- Search operators are different between the Find and Existing Value search and Keyword search. For example, the typical Keyword search operators include *contains*, *=*, *not =*, where as the Find an Existing Value search operators include more, such as *begins with*, *contains phrase*, *=*, *not =*, *greater than*, *less than*, *between*, *in*, and so on.

Note

When you use the contains phrase operator, enter a complete word or a set of words, for example desktop or desktop computer. You can also use wild card characters; the wild card characters can be used at the beginning of a word, within a word or at the end of a word. Examples of valid search text containing wild cards: **test*, *t*st*, *test**.

- Keyword search fields do not contain prompts or drop-down lists. Search text needs to be added in a free-form manner, using wild cards as needed.

Note

In the Find an Existing Value tab you specify a wild card using "%", while in Keyword search you specify a "*".

Working with Keyword Search Data Currency

The Keyword search can display only search results that are included in the index. Search Framework provides the capability to enable real-time indexing for search definitions.

In search definitions that are *not* enabled for real-time indexing, the index is only as current as the last incremental index update or the last full build date and time. As such, the Keyword search results will not always contain the most current reflection of the transactional data.

For example, assume that an organization has the incremental index update process schedule to run once every 3 days. If a salesperson adds a new customer to the system just after the incremental update occurred, that customer information will not appear in the Keyword Search results until the next incremental index update process has completed. Likewise, if a customer has been deleted from the system just after an incremental index update, the search results for the Keyword Search will continue to include that customer information until the next incremental index update process has completed.

The Keyword search page (real-time indexing is *not* enabled) displays a message indicating how fresh the search results are. For example:

Note: Search will return results last updated 5 hours ago.

If you enable real-time indexing for a search definition, the data is indexed every time an update occurs on the search definition providing you near real-time data.

The Keyword search page (real-time indexing is enabled) does not display any message to indicate how fresh the search results are because the search results are near real time.

See [Understanding Real-Time Indexing](#).

Requirements for Keyword Search

The requirements for keyword search slightly differ depending on whether you are using Application Designer or Manage Configurable Search page to set keyword search for a component.

When you use Application Designer to set keyword search for a component, ensure that the following settings are met:

- All the search and alternate search keys shown on the search page must be indexed attributes.
- Only the fields marked as List Box items on the component search record will be shown.

Note

This is true when showing the results in the grid format for the keyword search. If you switch to list format, you can display additional fields that are indexed but not marked as List Box or search keys.

- All List Box item fields must be indexed attributes.

Note

Grid-based view of the keyword search results is based on the List Box item configuration on the associated search record.

Note

If a non-default label is selected for a search key, alternate search key, or list box item on the search record, the same label must be configured for use on the Map Search Attributes page.

When you use the Manage Configurable Search page to set keyword search for a component, ensure that the following settings are met:

- All the requirements listed for keyword search through Application Designer.
- Fields selected for search criteria and results must be indexed attributes.

See [Working with Configurable Search](#).

Working with Keyword Search Modes

The Keyword search page has these modes:

- Keyword-only
- Basic
- Advanced

These modes can be selected in the Component Properties dialog box.

Working with Keyword-Only Mode

The keyword-only mode is not supported. If keyword-only mode is selected for a component and if configurable search is enabled for the component, then keyword-only mode is not honored. Instead, basic mode is displayed.

See [Considerations for Using Configurable Search](#).

Working with Basic Mode

In basic mode, the Keywords edit box displays with an additional 'Search by' option with a drop-down list box to select a search record field to use for as search criteria.

Working with Advanced Mode

The advanced mode displays all search criteria:

- Keywords.
- Search record fields.
- Search fields defined for the Search Framework search category on the Advanced Search Fields tab.

The following illustration depicts the controls on the advanced search page and their association.

The diagram illustrates the controls on the advanced search page and their associations. It shows a list of search fields, each with a dropdown menu for the search type (e.g., 'contains phrase') and a text input field. The fields are grouped into three categories:

- Keyword:** A single text input field at the top.
- Search Record Fields:** A group of fields including Empl ID, Empl Record, Name, Last Name, Second Last Name, Alternate Character Name, Middle Name, First Name, Business Unit, Regulatory Region, Job Title, Location Code, Position Number, Department, Display Name, Position Description, Location, Department ID, and Job Code.
- Advanced Search Fields selected for Search Category:** A group of fields including Empl ID, Empl Record, Name, Last Name, Second Last Name, Alternate Character Name, Middle Name, First Name, Business Unit, Regulatory Region, Job Title, Location Code, Position Number, Department, Display Name, Position Description, Location, Department ID, and Job Code.

Arrows indicate the associations between the fields and their respective categories. For example, the 'Keyword' field is associated with the 'Keyword' category, and the 'Search Record Fields' are associated with the 'Search Record Fields' category. The 'Advanced Search Fields selected for Search Category' are associated with the 'Advanced Search Fields selected for Search Category' category.

Note

The system does not display in the Advanced Search Fields list any search fields that are also displayed in the search record search field list.

Note

All search record fields (Key, Alt Key, and List box fields) must be part of the index. If any of the fields have translate values, those translate fields must also be part of the search index.

Note

The search criteria that appears depends on the application's usage of the search filter PeopleCode and the type of data. For example, contains phrase is applicable to a character field, but not to a number field.

Working with Global Search

This section provides an overview of working with global search.

Understanding Global Search

Global Search provides a way for a user to search across all search indexes or a specific group of search indexes. End users submit a Global Search using the Global Search Bar, which is available in the Portal header throughout the user's session irrespective of the content the user is accessing in the target frame. The Global Search feature allows the user to search and drill down to a specific row of data or transaction from the search results, all without navigating through a menu structure to the component search page and entering search criteria there. In a cluster environment, Global Search can search across indexes from multiple content systems.

Note

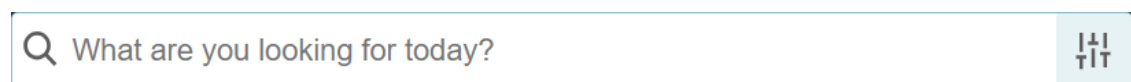
From PeopleTools 8.55, the fluid global search page is used irrespective of the default theme and style the application is using. Global search does not support persistent search.

Global Search is enabled by default based on three conditions:

- At least one search index defined in the Search Context page must be deployed and crawled on the system.
- A user accessing global search must have the required permissions for the deployed search index.
- A user accessing global search must have access to the Fluid Global Search component.

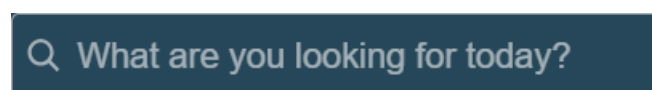
On homepages, the Global Search bar is presented in its expanded form:

This example illustrates the expanded form of the Global Search bar.

A screenshot of the expanded Global Search bar. It features a light blue background with a magnifying glass icon on the left. The placeholder text "What are you looking for today?" is displayed in a dark blue font. On the right side, there is a small icon consisting of three vertical bars of increasing height.

On transaction pages and dashboards, global search is presented in its muted form:

This example illustrates the muted form of the Global Search bar.

A screenshot of the muted Global Search bar. It has a dark blue background with a magnifying glass icon on the left. The placeholder text "What are you looking for today?" is displayed in a lighter blue font.

The Global Search Bar consists of free text search edit box and a Search button.

Related Topics

- [Working with Search Pages](#)

This section provides an overview of working with search pages.

Working with Search Groups and Search Contexts

When implementing Global Search, it is highly recommended to employ search contexts and search groups. These constructs work together to refine the user interaction with the Global Search search category.

A search group is a type of search category that is exposed to Global Search to help manage search definitions deployed to the search engine. Search groups provide a way to show relevant categories based on the context the user is in on the target frame. A search definition can belong to multiple search groups. You manage search groups in the Search Framework Administration Activity Guide. In a cluster environment, for example, search groups can be formed to include search definitions deployed across content systems.

Using search contexts, you can configure search groups such that based on the context in the target frame, only a subset of all possible search groups are available to the user in the Global Search Bar. For example, if the end user is accessing content from a PeopleSoft Financial application, then only search groups relevant to that application will be available. Likewise if a user is accessing content from a PeopleSoft Human Capital Management application, then only search groups related to that application will be available.

At any given time, end users have these types of search groups available:

- All: This search group will always be available and is a group of search categories that span across all the indexes that have been deployed and made searchable for a PeopleSoft application.
- Component Specific: This type of search group will match the component the user is currently viewing in the target frame. For example, if a user is viewing an expense report, then the Expense Report component would be the search group that is available, if the component is indexed, and it does not apply already to the Home Page context.

Note

Search groups are listed in a different order in the suggestions search compared to the global search. For more information, see [Working with Suggestions Search](#).

Note

Only Home Page search context can be used. Template level and Node level search contexts are no longer valid. If a search context is not defined for Home Page, then only the All search group is displayed.

In a cluster environment, Portal's Home Page search context is used always.

Global Search shows search groups in the Global Search Bar based on a user's role. To set up permissions to search groups, you use PeopleTools Security permission lists. Setting up role-based search group access is discussed in the Security topics in this document.

To view what search group permissions have been defined for delivered search categories, see *Application Fundamentals* (your pillar).

Related Topics

- [Setting Up Role-Based Search Group Access](#)
Global Search displays search groups in the Global Search Bar based on the user's role. If a search group assigned to a context belongs to the permissions for a role to which that user belongs, then the search group will appear in the search group drop-down list for that user. You configure search group access by selecting **PeopleTools**, and then **Security**, and then **Permissions and Roles**, and then **Permission Lists**, and then **Search Groups**.
- [Managing Search Context](#)
This section provides an overview of managing search context.
- [Specifying General Search Category Settings](#)
Access the General page by selecting **PeopleTools**, and then **Search Framework**, and then **Search Designer Activity Guide**, and then **Search Category**.

Working With the Portal Registry Search

This section contains an overview and describes how to set up the portal registry search.

Understanding the Portal Registry Search

PeopleTools provides the search definition, PTPORTALREGISTRY, which enables you to index the content references registered in the portal menu registry. If you deploy this search definition and build the index (just as you would any search definition), end users can search for content references and menu items using the free-text edit boxes and navigate to the underlying pages using the search results, rather than navigating the menu structure manually. This can provide an extremely efficient means of accessing application content.

Note

The portal registry search category is named Menu.

If you run the search from the menu pagelet or drop-down navigation Search Menu edit box, the search request only goes against the current portal. For example, if the user is currently logged into the EMPLOYEE portal, the search will be specific to content references defined within the EMPLOYEE portal only.

If you run the search from the Global Search Bar, the search request goes against *all* the portals defined in the local portal registry.

The PTPORTALREGISTRY search definition is based on the delivered PTPORTALREGISTRY query, which verifies the "Valid From" and "Valid To" dates for content references.

Note

For more accurate search results, it is recommended that you schedule running your index updates based on how often the content references in your system change effective dates and expire dates.

Setting Up the Portal Registry Search

To enable Portal Navigator Search:

1. Deploy the PTPORTALREGISTRY search definition and category.
2. Build the index.

There are some additional options that can be added as well:

- To add "Auto suggest," add permission using PeopleTools, Security to this web library: WEBLIB_PORTAL.PORTAL_SEARCH_PB.FieldFormula.IScript_SESPortalQry. This enables the system for anticipating the users desired search based on the partial input.
- To add the Portal Navigator index to Global Search, use **PeopleTools**, and then **Security**, and then **Permissions and Roles**, and then **Permission Lists**, and then **Search Groups**, and add the search category, PTPORTALREGISTRY, to the Search Groups grid.
- To enable the Navigator category to display in the Global Search drop-down list, select **PeopleTools**, and then **Search Framework**, and then **Search Admin Activity Guide**, and then **View Search Contexts**. Click the Edit Context link and add PTPORTALREGISTRY to the context type Homepage.
- To combine separate search definitions into a single search group, you use the PeopleSoft delivered Administer Remote Search Group ACM plug-in. You can combine search definitions from the same content provider or across content providers. For example, you can combine PTPORTALREGISTRY indexes from multiple content providers into a single Menu global search group.

When you run the Administer Remote Search Groups plug-in, the plug-in:

- Imports the search group from the source.
- Adds the search group to the search context.
- Merges the groups in the search engine server.

For information on using ACM plug-ins, see Automated Configuration Management: Running the PSRUNACM Script.

- The facet folder used for CREFs under Fluid Structure and Content, Fluid Pages is the folder that appears after the Fluid Pages folder. For example, in this folder structure (Fluid Structure and Content, Fluid Pages, FOLDER A, CREF A), the facet folder for CREF A will be FOLDER A.
- Every search result displays an icon, which is associated with the CREF. If you want to change the associated icon, consider the following:
 - PTNAVSRCH_DEF_ICN is the default icon used by the portal registry search (Navigator). If you want to replace this icon, you need to replace PTNAVSRCH_DEF_ICN with your own icon. The icon is uploaded in Application Designer.
 - If a CREF has a Tile image associated with it, it will use that Tile image, but only if the image is in the SVG format. If a Tile image is not associated with a CREF or if the CREF uses a non- SVG image type, then the system uses the default icon (PTNAVSRCH_DEF_ICN) for the search result.
- To exclude a CREF from the Navigator search index, ensure that you select the Hide from portal navigation option on the Content Ref Administration page.

Note

A specific CREF must be marked as hidden from navigation to be excluded from PTPORTALREGISTRY. A CREF that belongs to a portal folder that is marked hidden does not mean that the CREF is hidden.

Maintaining the Portal Registry Search

In order to ensure that the PTPORTALREGISTRY index provides accurate search results of content references registered in the portal menu registry, you must remove deleted content references from the index.

When you build an index for the PTPORTALREGISTRY search definition using the incremental index, the indexing process removes expired content references from the index. Currently, the PeopleSoft system does not track the deleted content references in the portal menu registry that should also be removed from the index. In this scenario, PeopleSoft recommends:

1. Ensure that content references that you want to delete are expired by setting the "Valid To" date to a past date on the Structure and Content page.
2. Run the incremental index for the PTPORTALREGISTRY search definition, which will delete the expired content references from the index.
3. Delete the expired content references from the portal menu registry.

Related Topics

- Portal Technology: Administering Content References

Working with the Insights Search Group

PeopleTools provides the search definition, PTSF_INSIGHTS, which enables you to index the imported and deployed dashboards.

Search Framework provides an efficient means to search for dashboards or visualizations in the Insights search group based on their title, description, and panel label. When you search for dashboards or visualizations, Search Framework displays search suggestions. You notice that the title of the dashboard appears in the search suggestions. The description of the dashboard is also included in the additional details. If a description is not available, then the additional details remain blank.

Note

Users with Edit or View permissions for a specific visualization and the Search Administrator can search and view the dashboards.

For more information, see [Importing a Dashboard](#).

Working with Suggestions Search

Search Framework provides an extremely efficient means to access content references and application content, without navigating the menu structure manually, using the global search bar that is provided in the banner. When you click in the search box or enter a keyword, Search

Framework automatically lists suggestions relevant to a user based on several factors, which are described later in this topic.

When you search for a keyword using global search, Search Framework displays the suggestions for the selected search group that match the keyword. It also shows the content reference descriptions as additional details. These additional details are shown in both the suggestions search and the global search results. If the CREF description is not available, then the system displays the folder name as an additional detail for Menu index.

Suggestion Search supports typo tolerance to improve results when you enter misspelled keywords. When this feature is enabled and the initial keyword search returns no results, the system uses the OpenSearch phrase suggester to generate suggestions for the misspelled keyword. The Search Framework uses the best suggestion and automatically re-executes the search using the corrected keyword.

Menu (PTPORTALREGISTRY search definition) is the default search category. Suggestions are supported for any search category configured for global search.

Note

In the search box, selecting the search icon displays the global search user interface where you can use advanced search features and facets.

See [Working with Global Search](#) for information on using global search.

Note

If the search server is down, the search box displays the following message: No results to display.

General Guidelines Regarding Suggestions Search

Consider the following guidelines that control the display of suggestions:

- Six properties control the display of suggestions, and you specify these properties on the Search Options page.
 - Maximum Results in Suggestion Search
 - Number of Days for Recent Ranking
 - Recent Documents Retention (days)
 - Number of Recent Results
 - Use Search Context Sequence
 - Enable Typo Tolerance

For description of these parameters, see [Managing General Search Options](#).

- Ranking of suggestions takes into account the last accessed time of a component and the number of times the page is visited. If a page is visited frequently, the score of the page increases thereby pushing the page to the top of the suggestions list.
- PeopleSoft stores the data on recent navigation and keyword searches and the updated data is indexed in the search engine using real-time indexing, but you should enable these

search definitions for real-time indexing. The search engine uses the PTSF_RECENTMENU and PTSF_RECENT_KW search definitions.

See [Configuring Real-Time Indexing](#).

- Search Framework automatically lists application pages you visited most recently. You use the Search Options page to set the number of recently visited items displayed in the suggestions. By default, it displays the last five recently visited items in the selected search category. You can select **See More** to access additional recently visited items. The **Clear All** option enables you to clear all the recently visited items displayed. You can clear the recently visited individual results displayed using the (X) icon.

Note

Using the **Clear All** option or the (X) icon also clears the recently visited items displayed via the Recently Visited button in the quick access bar and NavBar.

You can also use the Search Suggestions widget to seamlessly search within any other search category without having to navigate away. **See All** lists all search categories available to the user. **See Less** will return to the previous view. See the example of a suggestion search later in this topic.

- Suggestion Search supports typo tolerance to handle misspelled keywords. When typo tolerance is enabled and the initial search returns no results, the system uses the OpenSearch Phrase Suggester to identify the best suggestions and reruns the search with the corrected keyword.

Note

When the system displays results for a corrected keyword, it also displays a message indicating that the results are based on the corrected keyword. The message provides a Search Instead option that enables the user to rerun the search using the original keyword.

You can enable or disable typo tolerance using the Enable Typo Tolerance field on the Search Options page.

See [Managing General Search Options](#).

- Search Framework supports suggestions in a clustered environment.

Suggestions for Menu Search Category

The Menu category is the default category.

In a cluster or multiple content systems environment, menu category is the default category, and it shows suggestions from all the associated content system menus if the PTPORTALREGISTRY from those systems is imported. To see the individual content system's menu as a search group, you must add the content system's PTPORTALREGISTRY as a search category in the search context list.

However, in Global Search with faceted navigation, menu search is restricted to the selected search group. When searching in a cluster environment, you must select the appropriate search group or use the category facet to navigate.

The suggestions for Menu category are automatically displayed in the following order:

- The first set of suggestions is based on your recent page activity. If your recent page activity does not fill up the configured number of results in the list, then the next set of suggestions is used.
- The second set of suggestions is based on page activity of other users, but only those pages that you have access to are displayed.
If the second set of suggestions do not fill up the remaining list, then the third set of suggestions is used.
- The third set of suggestions is the top results of a wildcard search on the PTPORTALREGISTRY search index that match the keyword. If a keyword is provided in the search box, the results get updated to reflect the keyword or keywords you've entered and the suggestions list gets updated based on the prioritization rules.

Suggestions for Content Search

Choose a search category.

Suggestions for any indexed category are automatically displayed in the following order:

- The first set of suggestions is based on your recent page activity in the selected search category. If your recent page activity does not fill up the configured number of results in the list, then the next set of suggestions is used.
- The second set of suggestions is the top results from a wildcard search on the selected search category that match the keyword.

Note

When you select All as a category, a wildcard search is performed on all the indexes except the Menu and Insights index, and the top results that match the keyword are displayed.

Embedding Search Box in Component Pages

In component pages, the search box can be embedded that can be used for searching on specific component index. You need to add the search user interface subpage in the component page and call the SetSearchbarContext method in the Activate event of the component page.

You can also add the search categories at page level, but that may not match with the one you have on Global Search.

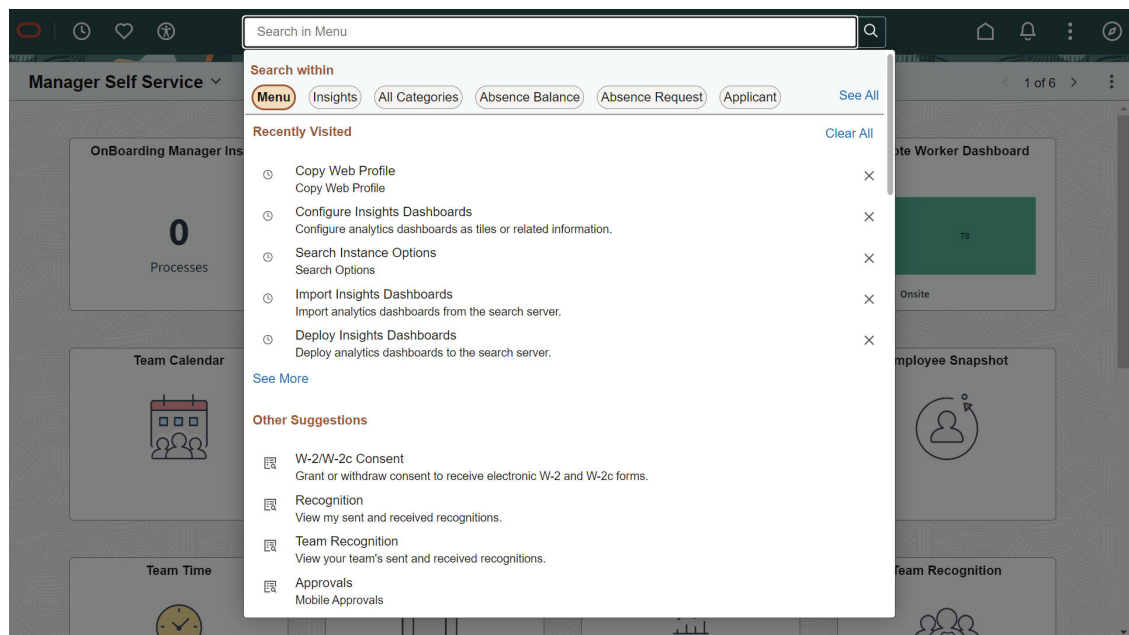
See Fluid User Interface Developer's Guide: Embedding the Suggestions Search Box.

For information on the application class, see PeopleCode API Reference: SearchbarContext Class.

Example 15-1 Example of Suggestions

The following example uses the Menu category and shows the list of search suggestions.

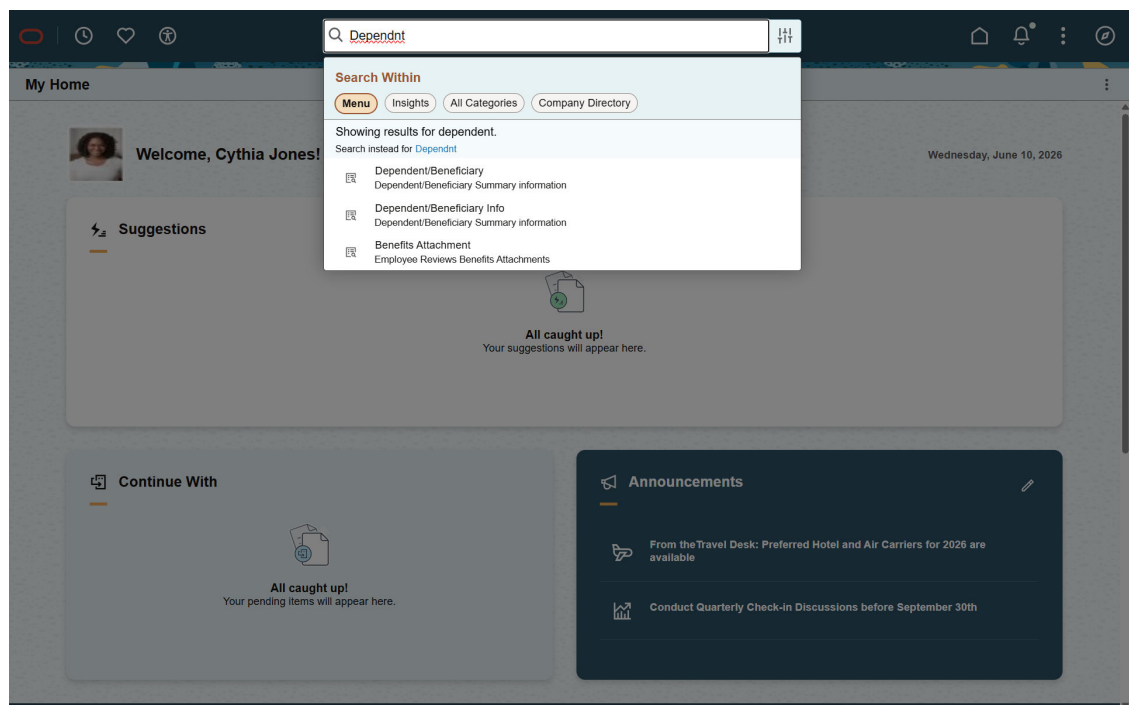
This example illustrates display of suggestions.



Example 15-2 Example of Typo Tolerance in Suggestion Search

The following example uses the Menu category and shows the list of search suggestions with typo tolerance enabled.

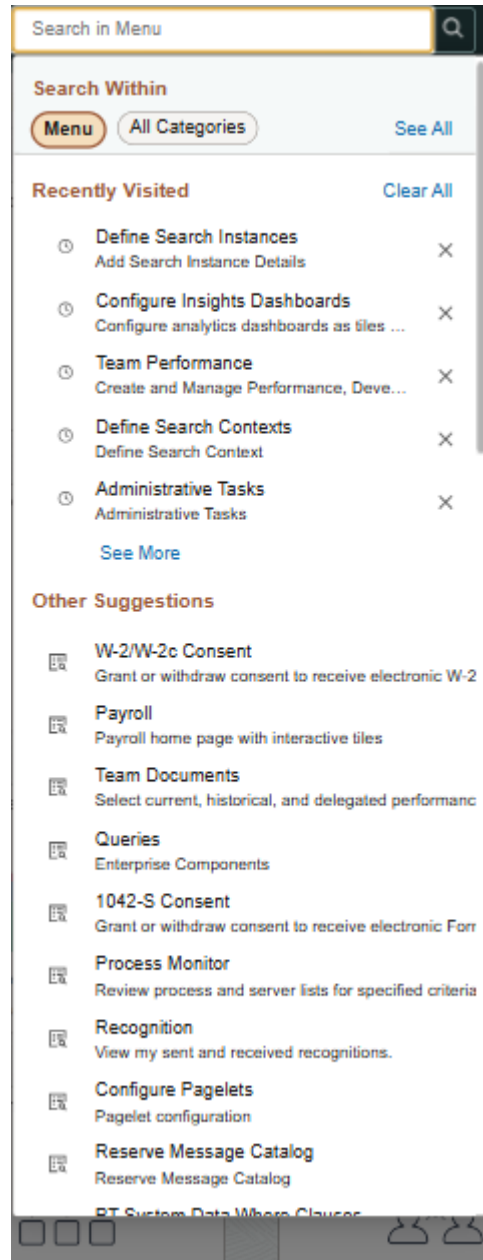
This example illustrates the Did You Mean behaviour, where the system displays results for a corrected keyword and provides a Search Instead option to rerun the search using the original keyword.



Example 15-3 Example of Suggestions Search on Small Form Factor Device

On small form factor devices, the search box is displayed in the entire screen. You select categories by using the search groups available in the Global Search. The default category is Menu.

This example illustrates Suggestions Search on small form factor device.

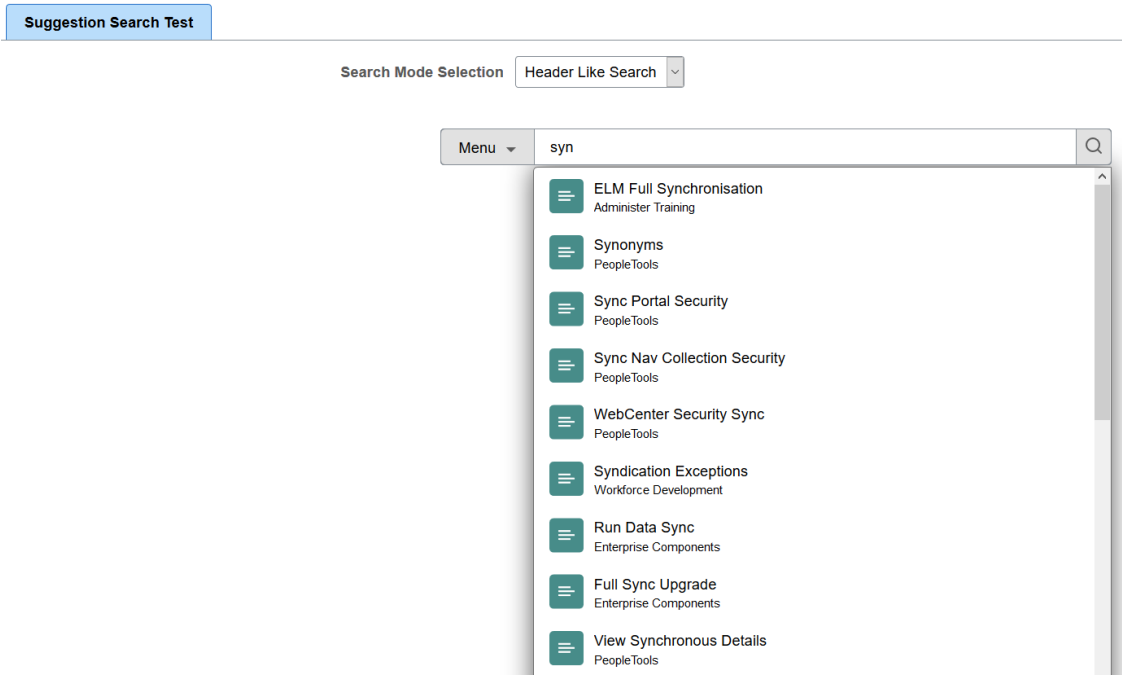


Testing Suggestions Search

Search Framework provides the Suggestion Search Test page to simulate the suggestions list functionality that is available on the homepage and in transaction pages.

Access the Suggestion Search Test page by selecting **PeopleTools**, and then **Search Framework**, and then **Utilities**, and then **Suggestion Search Test**.

This example illustrates the fields and controls on the Suggestion Search Test page. You can find definitions for the fields and controls later on this page.



Field or Control	Description
Search Mode Selection	You can use this page to simulate several use cases, such as: - Header Like Search - Simulates the search available on the homepage using the search box. - Only Comp/Gen URL - Search only PeopleSoft components or generic URL. - Search Hidden Cref - Search that includes hidden content references. - Transaction Search - Simulates the search available on the transaction pages.

Working with Semantic Search

Semantic Search enables PeopleSoft Search Framework to return search results based on the meaning and context of a search query, rather than relying only on exact keyword matches. Semantic Search uses vector embedding to represent indexed text and user queries as numeric vectors.

OpenSearch compares these vectors to identify results that are semantically similar to the search text.

PeopleSoft uses Semantic Search with hybrid search. Hybrid search combines keyword search and vector search so that exact keyword matches continue to receive higher priority, while semantic matches improve result recall when users enter related terms or phrases.

For example, a keyword search may not return results when the indexed content does not contain the exact search phrase. With Semantic Search enabled, a query such as healthcare

products can return related catalogue items such as bandages or gauze products, even when the exact phrase is not present in the indexed text.

In PeopleTools 8.63, Semantic Search is enabled by default for the Menu index, also known as PTPORTALREGISTRY. The delivered Menu index uses the title and description fields as vector fields and is enabled for Semantic Search. The delivered OpenSearch setup includes the default model setup required for the delivered Semantic Search configuration. You do not need to install a custom embedding model to use the delivered Semantic Search configuration.

Semantic Search can be enabled for other query and connected query search definitions as needed. Existing keyword search behavior remains available unless Semantic Search is configured for the search definition, the search definition is redeployed, and the index is rebuilt with vector embedding. If you do not want to use Semantic Search, you can disable it from the Semantic Search configuration.

Use Semantic Search for search definitions that contain meaningful descriptive text, such as menu labels, menu descriptions, catalogue item descriptions, product details, supplier descriptions, contract descriptions, or profile descriptions.

Semantic Search generates embedding during indexing. The selected vector fields are converted into vector embedding and stored in the OpenSearch index. During search, OpenSearch converts the user's query text into an embedding and compares it with the indexed embedding.

Indexing is the most resource-intensive part of Semantic Search because embedding are generated and stored for indexed documents.

Semantic Search Configuration

Use the following configuration pages and related setup topics to configure and manage Semantic Search:

- **General Settings:** use this page to enable Semantic Search and define processing options, such as vector field count, batch size, vector scoring method, scoring value, and search pipeline. For more information, see [Specifying Semantic Search General Settings](#).
- **Embedding Models:** use this page to view, import, deploy, and activate embedding models used to generate vector embedding for semantic-search-enabled indexes. For more information, see [Managing Semantic Search Embedding Models](#).
- **Search Attribute Mapping:** use this page to select fields in a search definition that are used to generate vector embedding for Semantic Search. For more information, see [Mapping Search Attributes](#).
- **Advanced Index Settings:** use this page to enable chunking for indexes that contain large text fields selected for vector embedding. For more information, see [Working with Chunking](#).
- **Dedicated ML Node Configuration:** use this setup topic to configure a dedicated OpenSearch ML node for Semantic Search processing. For more information, see [Configuring a Dedicated ML Node](#).
- **Custom Embedding Model Installation:** use this setup topic to register and deploy a custom embedding model in OpenSearch before importing and activating it in PeopleSoft. For more information, see [Installing Custom Embedding Models](#).

Specifying Semantic Search General Settings

Use the **General Settings** page to configure Semantic Search processing options.

Access the **General Settings** page by selecting **PeopleTools**, and then **Search Framework**, and then **Semantic Search**, and then **General Settings**.

This example illustrates the fields and controls on the General Settings page. You can find definitions for the fields and controls later on this page.

General Settings

Semantic Search

Use semantic search ☒

Vector Field Count

Ingest Properties

Batch Size

Search Properties

Vector Scoring Method

Value

Search Pipeline

Save

Field or Control	Description
Use Semantic Search	Select to enable Semantic Search. Search definitions that use vector fields must be redeployed and fully indexed before semantic results are available.
Vector Field Count	Enter the maximum number of fields that can be selected as vector fields in a search definition. The default value is 2. Increase this value only after evaluating CPU, memory, and storage capacity in the OpenSearch nodes. Dedicated ML nodes are recommended to improve processing speed and avoid the impact to regular search operations to the Master/Data nodes.
Batch Size	Enter the number of documents sent to the search server in a batch when Semantic Search is enabled. The default value is 300. Smaller batches help reduce memory and CPU pressure during vector indexing.
Vector Scoring Method	Select the method used to retrieve semantic matches. Available values are: - kNN - Max Distance - Minimum Score Only one scoring method can be selected at a time. For more information on Vector Scoring Method, see the Vector Scoring Method topic below.

Field or Control	Description
Value	Enter the value for the selected vector scoring method: - For kNN: enter the number of nearest results to retrieve. - For Max Distance: enter the maximum vector distance from the query vector. - For Minimum Score: enter the minimum similarity score required for results to be returned.
Search Pipeline	Enter the OpenSearch search pipeline used to normalize and combine keyword-search scores and semantic-search scores for hybrid search. PeopleTools deploys the <i>ptsf-search-pipeline</i> search pipeline during search definition deployment.

Vector Scoring Methods

Semantic Search supports the following vector scoring methods. PeopleSoft uses hybrid search, which combines and normalizes the scores from keyword and neural search queries. The specified scoring method applies only to the neural query. The normalization process adjusts the score after receiving the individual scores from both queries.

Scoring Method	Description
kNN	Returns the top <i>k</i> nearest vector matches for the specified search query. Use this method when Semantic Search must retrieve a fixed number of results based on vector proximity. With the kNN method, the search keyword is converted into a vector representation, and the search engine identifies the <i>k</i> closest indexed vectors according to the configured similarity metric. Because the results are selected based on nearest-neighbor distance rather than exact semantic equivalence, some returned items may have lower semantic relevance. However, higher-ranked results represent the closest vector matches. PeopleSoft uses kNN as the default retrieval method, with <i>k</i> set to 50 by default.
Max Distance	Returns all vector matches within the specified maximum distance from the search query vector. Use this method when Semantic Search must retrieve only results whose vector distance is within a defined threshold, rather than returning a fixed number of nearest matches. A lower <i>max_distance</i> value applies a stricter similarity threshold and returns fewer, more closely related results. A higher <i>max_distance</i> value broadens the search radius and may return more results, including results with lower semantic relevance. The appropriate value depends on the embedding model, vector normalization, vector dimension, and configured OpenSearch space type. The value must be greater than 0.

Scoring Method	Description
Minimum Score	Returns vector matches whose calculated similarity score is greater than or equal to the specified minimum score. Use this method when Semantic Search must return only results that meet a required relevance threshold, rather than a fixed number of nearest matches or all matches within a maximum distance. With the <i>min_score</i> method, the search keyword is converted into a vector representation, and OpenSearch compares the vector with indexed vectors using the configured vector space. OpenSearch returns only results with a calculated score greater than or equal to the configured <i>min_score</i> value. A higher <i>min_score</i> value applies a stricter relevance threshold and returns fewer, more strongly matching results. A lower <i>min_score</i> value broadens the result set and may return more results with weaker semantic relevance. The appropriate value depends on the embedding model, vector normalization, vector dimension, and configured OpenSearch space type.

Semantic Search can return broader results than keyword search because it matches meaning rather than exact terms. Tune the vector scoring method and value when semantic results are too broad or include weak matches.

Managing Semantic Search Embedding Models

Embedding models convert indexed text and user query text into vector embedding. PeopleSoft uses these embedding to support semantic matching in OpenSearch.

Use the Embedding Models page to view the models that are imported or available for Semantic Search. This page identifies the model that PeopleSoft uses to generate embedding for indexes enabled for semantic search.

The page can include delivered models and custom models that are registered and deployed in OpenSearch and then imported into PeopleSoft.

Access the **Embedding Models** page by selecting **PeopleTools**, and then **Search Framework**, and then **Semantic Search**, and then **Embedding Models**.

This example illustrates the fields and controls on the Embedding Models page. You can find definitions for the fields and controls later on this page.

Embedding Models					2 rows	
Model Name	Model ID	Dimension	Active Model	Deploy		
1 huggingface/sentence-transformers/all-MiniLM-L12-v2	GjOB3poBn6Lh5apOZkru	384	☒	<button>Deploy</button>		
2 huggingface/sentence-transformers/paraphrase-multilingual-MiniLM	FzN_3poBn6Lh5apOHkrH	384	☐	<button>Deploy</button>		

Save Import

Field or Control	Description
Model Name	Displays the name of the embedding model imported for Semantic Search. The model name identifies the model used to generate vector embedding for indexed text and search queries. PeopleSoft delivers models that are preconfigured during OpenSearch installation.
Model ID	Displays the unique model identifier assigned to the embedding model. PeopleSoft uses this identifier to reference the model during semantic indexing and search processing.
Dimension	Displays the vector dimension generated by the embedding model. The dimension must match the vector mapping used by the semantic-search index.
Active Model	Select this option to activate the model for Semantic Search. The active model generates embedding for indexes that have Semantic Search enabled. Depending on the PeopleSoft environment configuration, you can switch the active model as needed. Note that changing the active model requires the data to be re-indexed.
Deploy	Select to deploy the embedding model so that it is available for generating vector embedding.
Save	Select to save changes made on the page, such as the selected active model.
Import	Select to import available embedding model information into PeopleSoft.

You can configure and import custom models using this page. For more information, see [Installing Custom Embedding Models](#).

Working with Chunking

Chunking enables the system to divide large text into smaller segments before generating vector embedding for Semantic Search. When enabled, the search engine processes the text in chunks and generates embedding for those chunks during indexing.

This improves semantic search coverage for indexes that contain large text values, such as long descriptions, discussions, notes, or other detailed text fields. However, chunking can increase indexing time, CPU and memory usage, and index storage because the system generates and stores additional vector embedding.

When chunking is disabled, the system generates embedding without dividing the text into chunks. If the indexed text exceeds the supported processing limit, only part of the text may be used for embedding generation.

By default, chunking is disabled. Enable chunking only for indexes that contain large text fields selected for vector embedding.

Note

For a deployed index, the Enable Chunking option is disabled. To modify this setting, you must update the value and redeploy the search definition.

You use the Advanced Index Settings page to enable chunking for individual indexes.

Complete these steps to enable chunking for an index:

1. Navigate to **PeopleTools**, and then **Search Framework**, and then **Search Admin Activity Guide** and from Administration in the left panel, select **Deploy/Delete Object**.
2. On the Deploy Search Definition page, select the **Index Settings** link for the desired index.
3. On the Advanced Index Settings page, select the **Enable Chunking** check box.
4. Select **OK** to save your setting.

This example illustrates the Advanced Index Settings page where you enable chunking for an index.

The screenshot shows a dialog box titled "Advanced Index Settings" with a close button (X) in the top right corner. A "Help" link is also present in the top right. The dialog contains the following settings:

- Definition Name:** EOFD_FLUID_DISCUSSIONS
- Number of Shards:** 1
- Number of Replicas:** 0
- Enable Stemming:** ☒
- Enable Synonyms:** ☒
- Exclude Attachments:** ☐
- Enable Chunking:** ☐

At the bottom, there are two buttons: "OK" and "Cancel".

Configuring a Dedicated ML Node

A dedicated ML node is an OpenSearch node that performs ML processing for Semantic Search. Configure a dedicated ML node when you want embedding generation to run on a separate OpenSearch node instead of running on nodes that also perform data, ingest, or cluster-manager processing.

In the delivered setup, an OpenSearch node can include the ML role along with other node roles. To use a dedicated ML node, configure a separate node with the ML role and remove the ml role from the existing master or data nodes. With this setup, ML processing is handled only by the dedicated ML node.

Configuring a Dedicated ML Node

Complete these steps to configure a dedicated ML node for an existing OpenSearch cluster:

1. If the cluster is already set up, bring down all cluster nodes, ensuring that the master node is brought down last.
2. Add the new ML node host name to the *opensearch.yml* file on all nodes in the cluster. Add the new host to the discovery host configuration so that the existing nodes can discover the ML node when it joins the cluster.

Example:

```
discovery.seed_hosts:
  - <existing_node_1>
  - <existing_node_2>
  - <ml_node_host>
```

3. Remove the ml role from all existing master or data nodes.
Example:

```
node.roles: [ data, ingest, cluster_manager ]
```

The ML role must not remain on nodes that are not intended to perform ML processing.

4. Bring up the master nodes and data nodes one by one.
Confirm that the existing nodes start successfully before adding the dedicated ML node.
5. Install the dedicated ML node by using the `--ml` flag in the install command.
Run the following command on the server that you want to configure as the dedicated ML node:

```
./psft-dpk-install.sh --install --install_base_dir <BASE_DIR> --ml
```

Replace `<BASE_DIR>` with the installation base directory for your environment.

6. Check the cluster health.
Verify that all expected nodes have joined the cluster and that the cluster is healthy.

Example:

```
GET _cluster/health?pretty
```

You can also verify the node list.

Example:

```
GET _cat/nodes?v
```

After the dedicated ML node joins the cluster, OpenSearch handles ML processing on the ML node. Data nodes continue to manage indexing, storage, and search operations.

Note

A dedicated ML node changes where OpenSearch performs ML processing. It does not select vector fields, activate an embedding model, or rebuild semantic-search indexes.

After configuring a dedicated ML node, validate Semantic Search by indexing a semantic-search-enabled search definition. For information about importing and activating embedding models in PeopleSoft, see *Managing Semantic Search Embedding Models*. For information about installing a custom embedding model, see *Installing Custom Embedding Models*.

Installing Custom Embedding Models

Install a custom embedding model when you want Semantic Search to use an embedding model other than the delivered model. A custom embedding model must be registered and deployed in OpenSearch before you import and activate it in PeopleSoft.

Configure proxy settings for the OpenSearch node if the node must access an external model repository through a proxy. Proxy configuration is required only when the OpenSearch node cannot directly access the model source.

Example proxy settings:

```
-Dhttps.proxyHost=<proxy_host>  
-Dhttps.proxyPort=<proxy_port>
```

Complete these steps to Install a custom embedding model in OpenSearch:

1. Register a model group in OpenSearch.
Register a model group to organize one or more versions of the custom embedding model. Save the `model_group_id` from the response. You use this value when you register the model.

Endpoint:

```
POST /_plugins/_ml/model_groups/_register
```

Example:

```
{  
  "name": "ptsf_custom_embedding_model_group",  
  "description": "Model group for PeopleSoft Semantic Search custom  
embedding models",  
  "access_mode": "public"  
}
```

Response:

```
{  
  "model_group_id": "GDNmQ4gBYW0Qyy5ZcBcg",  
  "status": "CREATED"  
}
```

2. Register the embedding model in the model group and monitor the model registration task. Register the embedding model to the model group. Save the task_id and model_id from the response. Use the task_id to monitor the registration task until the task completes successfully.

Endpoint:

POST /_plugins/_ml/models/_register

Example:

```
{
  "name": "all-MiniLM-L6-v2",
  "version": "1.0.0",
  "description": "Custom text embedding model for PeopleSoft Semantic
Search",
  "model_format": "TORCH_SCRIPT",
  "function_name": "TEXT_EMBEDDING",
  "model_group_id": "GDNmQ4gBYW0Qyy5ZcBcg",
  "model_content_hash_value":
"c15f0d2e62d872be5b5bc6c84d2e0f4921541e29fefbef51d59cc10a8ae30e0f",
  "model_config": {
    "model_type": "bert",
    "embedding_dimension": 384,
    "framework_type": "sentence_transformers"
  },
  "url": "https://artifacts.opensearch.org/models/ml-models/huggingface/
sentence-transformers/all-MiniLM-L6-v2/1.0.1/torch_script/sentence-
transformers_all-MiniLM-L6-v2-1.0.1-torch_script.zip"
}
```

Response:

```
{
  "task_id": "tsqvDY4BChVAiNVEuo8F",
  "status": "CREATED",
  "model_id": "t8qvDY4BChVAiNVEuo8q"
}
```

Endpoint to monitor the registration task:

GET /_plugins/_ml/tasks/<task_id>

Response:

```
{
  "model_id": "t8qvDY4BChVAiNVEuo8q",
  "task_type": "REGISTER_MODEL",
  "function_name": "TEXT_EMBEDDING",
  "state": "COMPLETED",
  "worker_node": [
    "N77RInqjTSq_UaLh1k0BUG"
  ],
}
```

```
"is_async": true
}
```

3. Deploy the registered model in OpenSearch and monitor the deployment task.
Deploy the registered model so that OpenSearch can use it to generate vector embedding.
Save the task_id from the response and monitor the deployment task until it completes successfully.

Endpoint:

```
POST /_plugins/_ml/models/<model_id>/_deploy
```

Example:

```
POST /_plugins/_ml/models/t8qvDY4BChVAiNVEuo8q/_deploy
```

Response:

```
{
  "task_id": "hA8P44MBhyWuIwnfvTKP",
  "task_type": "DEPLOY_MODEL",
  "status": "CREATED"
}
```

Endpoint to monitor the deployment task:

```
GET /_plugins/_ml/tasks/<task_id>
```

Response:

```
{
  "model_id": "t8qvDY4BChVAiNVEuo8q",
  "task_type": "DEPLOY_MODEL",
  "function_name": "TEXT_EMBEDDING",
  "state": "COMPLETED",
  "worker_node": [
    "N77RInqjTSq_UaLh1k0BUg"
  ],
  "is_async": true
}
```

After the deployment task completes successfully, import the deployed model into PeopleSoft, set the model as the active model, and redeploy and fully index the affected search definitions. For more information, see [Managing Semantic Search Embedding Models](#).

For more information about custom embedding models, refer to the OpenSearch Model APIs documentation available on the OpenSearch website (www.opensearch.org).

Note

Changing the active embedding model does not automatically regenerate existing embedding. If you change the active model, or if a custom model uses a vector dimension that differs from the current mapping, update the Semantic Search configuration as needed, redeploy the affected search definitions, and run a full index to generate the stored embedding using the selected model.

Vector embedding generation and indexing are resource-intensive operations. Before enabling Semantic Search for any additional search definition, perform a proper assessment and ensure that one or more dedicated ML nodes are configured to support high usage.

Evaluate the storage requirements for vector embedding by using representative sample data before performing a full index. Ensure that sufficient storage is available for the fully indexed data. In general, indexes with vector embedding may require approximately three to four times more storage than indexes without vectors. The actual storage requirement may vary depending on the embedding model, vector dimension, chunking, and Semantic Search configuration.

Working with Synonyms

Use of synonyms can help users find values without knowing the exact term they are looking for. When the system detects the term used is part of a synonym list, it will return values that also appear as a synonym, thus improving the probability that the result the user wishes is available. However, it should be noted, that users will see more search results though the entered keyword may not be present.

In prior versions, PeopleSoft enabled you to use synonyms during the search process through a configuration file in the search engine. PeopleSoft delivered a configuration file (synonyms_grammar.txt) that enabled you to add synonyms based on your business requirements. PeopleSoft continues to support the use of the synonyms_grammar.txt file. You should enter synonyms in this file and manually upload this file to the search engine. The file is located at config\analysis\synonym_grammar.txt.

In addition to this functionality, PeopleSoft provides the Synonyms page to manage synonyms. Users can plan to start using the automated manner of maintaining their synonyms through PIA. Users can copy the contents of the synonyms_grammar.txt file and update the synonyms_custom file in PIA.

Synonyms are analyzed during the search process. PeopleSoft uses the synonym token filter of OpenSearch to analyze the synonyms.

Note

The following documentation is applicable to the use of synonyms managed through the Synonyms page.

Note

By default, synonym search is enabled.

Considerations for Using Synonyms

You should consider the following before you configure synonyms on the Synonyms page:

- PeopleSoft supports translation of synonyms that are delivered by PeopleSoft. Therefore, synonym files for related languages are suffixed with language codes. For example, synonyms_psft_eng.txt.
- Synonym file names are static and should not be changed because the exact file name is defined in the mapping of the index deployment requires .
- Synonym files are common to all indexes for which synonym search is enabled.
- In a scenario where an OpenSearch cluster is used for multiple PeopleSoft applications, synonym entries are merged to the same file, but the synonyms are separated by owner ID.
- In an OpenSearch cluster, synonyms are common for all databases for a specific owner ID.

Adding and Copying Synonyms

Use the Synonyms page to add synonyms and to copy the synonyms data to the search instance.

Access the Synonyms page by selecting **PeopleTools**, and then **Search Framework**, and then **Administration**, and then **Synonyms**.

This example illustrates the fields and controls on the Synonyms page. You can find definitions for the fields and controls later on this page.

Synonyms File Name

synonyms_psft

Synonyms
2 rows

*Synonyms ↑↓	*Object Owner ID ↑↓	Synonym Enabled? ↑↓		
email, e-mail => email	PeopleTools	☒	+	-
ipod, i-pod, i pod	PeopleTools	☒	+	-

Save

Copy to Search Instance

Download Synonym file

Field or Control	Description
Synonyms File Name	PeopleSoft delivers two files for synonyms. The default file is synonyms_psft. - synonyms_custom - This file is for users to add synonyms based on their business requirements. Oracle recommends that users use this file for entering their lists of synonyms to ensure that their synonyms are not overwritten with the PeopleSoft delivered list of synonyms in the synonyms_psft file. - synonyms_psft - PeopleSoft applications use this file to deliver its list of synonyms. Note: These file names are static and should not be changed. Note: Synonym files are common to all indexes for which synonym search is enabled.
Synonyms	Enter synonyms as comma separated values. The synonyms entered here are copied to the configuration file as is. An entry in this format: email, e-mail => email, means that when an end user searches for email or e-mail, they will get search results that contain email; not e-mail. An entry in this format: ipod, i-pod, I pod, means that when an end user searches using any of these keywords, they will get search results that contain all these keywords. Note: PeopleSoft supports the solr synonym format of OpenSearch.
Object Owner ID	Select the owner of the synonyms. The owner ID helps determine the team that created or modified the synonyms and also helps to segregate the synonyms in the configuration file.
Synonym Enabled	The Synonym Enabled check box determines whether the synonyms on the row should be added to the selected file. If you do not select the check box, the synonyms are not added to the selected synonym file when you save the file.
Save	Saves the synonyms to the database.

Field or Control	Description
Copy to Search Instance	Copies the selected file immediately to the OpenSearch analysis folder (OS_HOME\config\analysis\). You do <i>not</i> have to restart the OpenSearch server. When the copy action is issued, the indexes that are enabled for synonyms are temporarily closed, which might affect indexing if it is in progress. Important: The copy action should not be performed when indexing is in progress. In order for both synonym files to be available in the OpenSearch analysis folder, you must perform the Copy to Search Instance action for both synonyms files. During the copy action, only those blocks relevant to the owner ID are updated. In this manner, when you copy from another environment, it does not overwrite the synonyms as long as the owner IDs are different. For example, in a scenario where an OpenSearch cluster is used for multiple PeopleSoft applications and the synonym file contains both FSCM and HCM entries, and you're updating synonyms from the FSCM application, the copy action updates only those entries of the FSCM owner IDs. So, if the file has entries of HCM owner IDs, those blocks are not overwritten. The copy action must be performed for all the nodes in a cluster. Before you perform this action, you should ensure that the nodes are configured on the Search Instance page. See Working With Search Instances.
Download Synonym file	Download a copy of the selected synonym file to your local system. Note: Oracle does not recommend that you update the downloaded file manually and copy it to the analysis folder directly. If you do so, the data in the manually edited file can be overwritten when you click the Copy to Search Instance button. If you prefer to manually edit a synonyms file, you can use the synonyms_grammar.txt file because this file is not controlled through PIA.

Clearing Synonyms from a Synonyms File

If you need to clear or delete the synonyms entered in a synonym file, complete the following steps:

1. Access the Synonyms page, and select a synonym file.

Note

The synonyms_custom file is for users to add their list of synonyms. The synonyms_psft file is used by PeopleSoft applications to deliver its list of synonyms.

2. Clear the Synonym Enabled check boxes.
3. Select the Save button.
4. Select the Copy to Search Instance button.

Disabling Synonym Search for an Index

By default, synonym search is enabled. Synonym search is associated with an index.

Note

If you choose not to enable synonym search for particular indexes, then during an upgrade your choice is honored, that is, these indexes are not automatically enabled.

You use the Advanced Index Settings page to disable synonym search for an index.

Complete these steps to disable synonym search for an index:

1. Navigate to **PeopleTools**, and then **Search Framework**, and then **Search Admin Activity Guide** and from Administration in the left panel, choose Deploy/Delete Object.
2. On the Deploy Search Definition page, select the Index Settings link for the desired index.
3. On the Advanced Index Settings page, clear the Enable Synonyms check box, and select OK to save your setting.

This example illustrates the Advanced Index Settings page where you disable synonym search.

Advanced Index Settings

Help

Definition Name

EOFD_FLUID_DISCUSSIONS

Number of Shards

1

Number of Replicas

0

Enable Stemming:

☒

Enable Synonyms:

☒

Exclude Attachments:

☐

Enable Chunking:

☐

OK

Cancel

Migrating Synonyms Data Using ADS Definition

Oracle delivers an ADS definition to copy or migrate synonym metadata from one environment to another.

For information on using ADS, see Lifecycle Management Guide: Understanding ADS Projects.

ADS Definition for Synonyms

ADS definition for synonyms —PTSF_SYNONYMS.

PTSF_SYNONYM_GROUP

Details of PTSF_SYNONYM_GROUP:

Group	Details
Group Name	PTSF_SYNONYM_GROUP
Group Description	Group for PTSF_SYNONYM

Group	Details
Group Members	PTSFSYNONYMS.PTSF_SYN_ENABLED
Group Properties	Merge configurations.

Tables for PTSF_SYNONYMS

Table	Description
PTSFSYNONYMS	Stores synonyms data.
PTSFSYNONYMLANG	Stores translated synonyms data.

Working with Stemming

Stemming enables the system to return search results based on variations of a keyword. When stemming is enabled, the search engine analyzes each word during indexing, derives its algorithmic root form, and stores the root form in the document index.

During a search, the search engine applies the same conversion to the keyword, identifies matching root forms, and retrieves results that contain related words.

For example, universal, universe, and university can get to the common root form univers.

This improves search coverage by returning results even when the exact keyword is not present in the indexed data. However, stemming may return results that are not exact matches.

When stemming is disabled, the system performs exact keyword matching and returns results only when the entered keyword exactly matches the indexed data.

By default, stemming is enabled. Search definitions are indexed using stemming unless you explicitly disable it.

Note

For a deployed index, the Enable Stemming option is disabled. To modify this setting, you must update the value and redeploy the search definition.

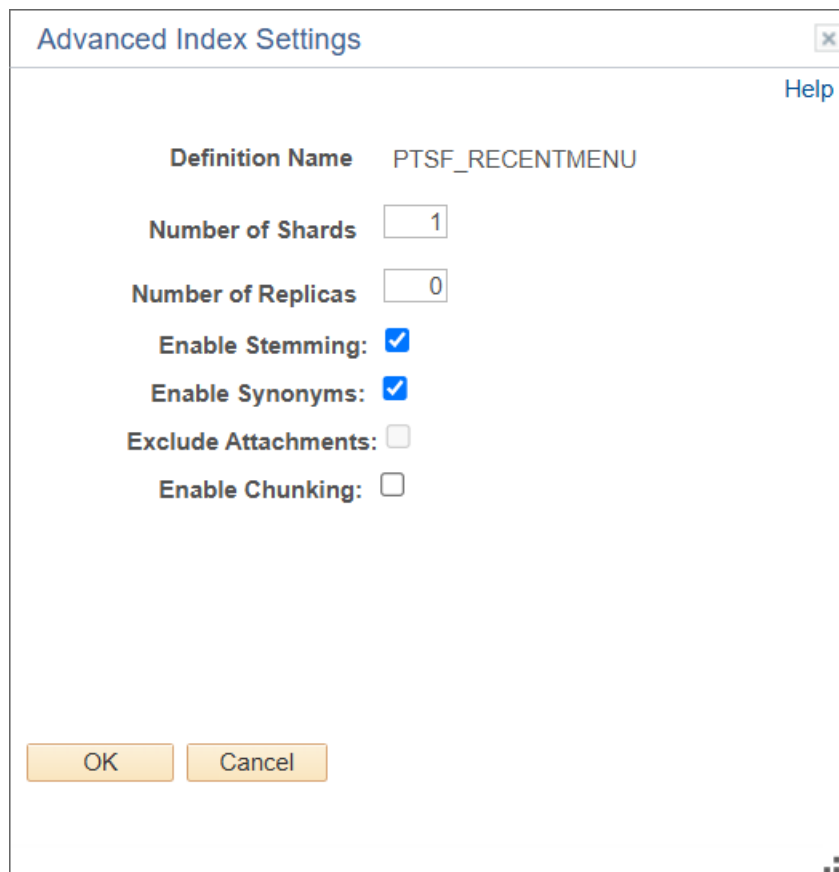
You can configure stemming either at the global level using the Search Options page or at the index level during deployment. For more information on Enable Stemming, see Managing General Search Options.

You use the Advanced Index Settings page to override stemming for individual indexes.

Complete these steps to enable stemming search for an index:

1. Navigate to **PeopleTools**, and then **Search Framework**, and then **Search Admin Activity Guide** and from Administration in the left panel, select **Deploy/Delete Object**.
2. On the Deploy Search Definition page, select the **Index Settings** link for the desired index.
3. On the Advanced Index Settings page, select the **Enable Stemming** check box.
4. Select **OK** to save your setting.

This example illustrates the Advanced Index Settings page where you enable Stemming search for an index.



The image shows a dialog box titled "Advanced Index Settings" with a close button (X) in the top right corner. A "Help" link is located in the top right area of the dialog. The settings are as follows:

Setting	Value
Definition Name	PTSF_RECENTMENU
Number of Shards	1
Number of Replicas	0
Enable Stemming:	☒
Enable Synonyms:	☒
Exclude Attachments:	☐
Enable Chunking:	☐

At the bottom of the dialog are two buttons: "OK" and "Cancel".

You can enable or disable stemming at the system level by using the property available in the Search Options settings. After changing this setting, redeploy the search definition for the changes to take effect.

Note

When typo tolerance is enabled, a stemming enabled search definition may provide suggestions in the root form rather than as the complete word when an incorrect keyword matches the stemmed word.

Working with Search Operators in PeopleSoft Search

In the Global Search bar and the Keyword Search box, PeopleSoft Search Framework 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.

Symbol	Usage	Description
*	document*	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, management. Note: PeopleSoft Search Framework requires a minimum number of characters to perform a search. The normal minimum is at least four characters plus the wildcard character. Note: In an OpenSearch-based search, PeopleSoft Search Framework supports using * (asterisk) as a leading character. Note: You can also use % (percent sign) as a wildcard. In PeopleSoft search, % is treated as a wildcard except when it appears within quotes.
?	Orac?e	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.

Symbol	Usage	Description
“ “	“year-end report”	Use “ “ (double quotes) around words that make up a phrase that must be matched exactly. However, because stemming is applied on the search text, search results containing different forms of the word or phrase will be displayed. For example, if your search text is "project manager," all forms of project manag (OpenSearch uses shorter and generic form of a word) will be displayed. Therefore, your search results could include project management, project manager, project managers, project managing, etc. You may use facets to obtain the desired search results.
&	document & report	Use & (ampersand) to specify that all words must appear in the results.
	“year-end report” statement	Use (pipe) to search on any of the words or phrase.
!	!john	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.
\$	\$install	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. Note: OpenSearch supports dictionary and algorithmic stemming, however in the current OpenSearch integration with PeopleSoft Search Framework, only algorithmic stemming is supported.

Symbol	Usage	Description
~	maintenance~	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. maintenance~ returns search results containing words such as maintenance.

Working with the Search Results

This topic discusses search results on a classic user interface.

After running a search using Keyword Search, the system presents the search results in an intuitive display, enabling interactive filtering and further navigation.

This example illustrates the fields and controls on the Search Results. You can find definitions for the fields and controls later on this page.

Find an Existing Value

Search Criteria

Note: Search will return results last updated 8 hours ago.
Enter any information you have and click Search. Leave fields blank for a list of all values.

Keywords
 ⓘ

Show more options

Search Results

50 of 66 results - Keywords "program manager"

[Hide Filter Panel](#)

Business Unit		☐ Include History ☐ Correct History									
☐ TQABU (25) ☐ LEBU (23) ☐ HXBU1 (16) ☐ GBIBU (1) ☐ KR001 (1)		Employee Photograph	Empl ID	Empl Record	Name	First Name	Last Name	Second Last Name	Alternate Character Name	Middle Name	Related Actions
			LE0007	0	Hsui,Lewiston Michael	Lewiston	Hsui	(blank)	(blank)	Michael	⊙ >
			LE0003	0	Lyons,Margaret Kelly	Margaret	Lyons	(blank)	(blank)	Kelly	⊙ >
			LE0015	0	Zenith,Abigail Leigh	Abigail	Zenith	(blank)	(blank)	Leigh	⊙ >
			LE0002	0	Keyes,Sharon MIDDLE NAME	Sharon	Keyes	(blank)	(blank)	MIDDLE NAME	⊙ >
			LE0011	0	Thompson,Candace Lynne	Candace	Thompson	(blank)	(blank)	Lynne	⊙ >

Field or Control	Description
Facets	This is the facet pane, which is the area to the left of the search results. Using the facets defined for the current search definition, the end user can filter the search results and drill down closer to the desired information. If searching the All category, you initially see the various search categories represented in the search results. By drilling into the category, you view the facets associated with attributes in the search index.
Title	The title enables you to identify the search result and navigate to the associated component. Select or tap the row to display the page you use to view or modify the underlying data for the search result. The title is defined using the Title edit box on the General tab of the Search Framework, Search Designer Activity Guide, Search Definition component.
Summary	Displays a general overview of the target data. The summary is defined using the Summary edit box on the General tab of the Search Framework, Search Designer Activity Guide, Search Definition component.
Related Actions Indicator	If the search definition is mapped to a component, and if there are any defined related actions associated with that component, the related actions indicator appears to the right of the search result if you've selected the Show Related Actions in Search Results field on the Search Configuration page. Clicking the related actions indicator displays a popup containing the defined related actions. See Configuring a Search Page.

Working With Facets

A facet is an attribute that may be part of one or more search definitions. It provides an alternate representation of the list of values for a given attribute. Facets are attributes used to filter and narrow down a set of search results.

If a facet contains sensitive or PII data, it will not be displayed. For more information on masking of sensitive data, refer to [Masking of Data in Search Results](#).

This example illustrates the fields and controls on the Filter by: Facets. You can find definitions for the fields and controls later on this page.

▼ **Business Unit**

☐ TQABU (25)

☐ LEBU (23)

☐ HXBU1 (16)

☐ GBIBU (1)

☐ KR001 (1)

Facets:

- Show search results across each index.
- When clicked show only results in that index related to that facet value.
- Can further narrow results using sub-facets in that index.

For example, assume the Customer component has a faceted attribute of Customer Level with values of L1, L2, and L3. By selecting the L1 facet link, L2 and L3 values will be removed from the search results list, leaving only the L1 for viewing.

For component Keyword search, the system determines facets associated with the search category to which the component is associated and renders them accordingly.

For Global Search, because the search results might span across multiple indexes that are not related to each other, each search definition within a specific search category should have common attributes marked as facets. These attributes should be generic so search results can be classified under one of these attributes. If non-common attributes are marked as facets in the search category, results not having that attribute will not be displayed.

Note

If an attribute is marked as a facet, and if for a given search document that facet attribute does not have a value, then the query is dynamically modified to return *No Value* as the title of the facet.

Facets display 10 values by default. If a particular facet has results for more than 10 facet values, *More....* appears at the bottom of the list.

This example illustrates the *More...* control used to reveal more facet values.

▼ Department

Find Department

Q

×

☐ Human Resources (299)

☐ Information Services (238)

☐ Public Affairs (115)

☐ Assembly (64)

☐ Shipping (48)

☐ Finance (38)

☐ Cafeteria (32)

☐ Business Services (21)

☐ Administration (19)

☐ Purchasing (18)

More

Click *More...* to expand the list.

Note

For any facet, the maximum number of values displayed is restricted to 100 for performance reasons.

This example illustrates the *Less...* control used to reduce the facet values displayed. Once the entire list of facet values is expanded, click *Less...* to collapse the list, showing only 10 again.

▼ Department

Find Department

Qⓧ

☐ Human Resources (299)

☐ Information Services (238)

☐ Public Affairs (115)

☐ Assembly (64)

☐ Shipping (48)

☐ Finance (38)

☐ Cafeteria (32)

☐ Business Services (21)

☐ Administration (19)

☐ Purchasing (18)

☐ Marketing (17)

☐ All Departments (11)

☐ Sales (10)

☐ Customer Services (5)

☐ Manufacturing (4)

☐ ST - General Ledger Accounting (4)

☐ ST - Accounts Receivable Dept (3)

☐ ST - Receiving Department (3)

☐ ST - Administration Department (2)

☐ Department AW01 (1)

☐ Eastern Sales Region (1)

☐ GX DEPARTMENT 1 (1)

☐ HRMS Division (1)

☐ ST - Payroll Department (1)

[Less](#)

Searching within Facets

When a facet contains more values than are displayed by default, a search field appears within the facet. Use this field to locate a facet value without expanding and scrolling through the full list of values.

Enter search text in the facet search field and press Enter or select the Search button. The facet displays matching values in the same sort order used by the facet.

This example illustrates the search field and controls used to search within a facet.

The screenshot shows a facet titled "Department" with a search field and a list of department options. The search field is labeled "Find Department" and has a magnifying glass icon and a close button. Below the search field is a list of departments, each with a checkbox and a count in parentheses. The departments listed are: Human Resources (299), Information Services (238), Public Affairs (115), Assembly (64), Shipping (48), Finance (38), Cafeteria (32), Business Services (21), Administration (19), and Purchasing (18). At the bottom of the list is a blue link labeled "More".

Department	Count
☐ Human Resources	(299)
☐ Information Services	(238)
☐ Public Affairs	(115)
☐ Assembly	(64)
☐ Shipping	(48)
☐ Finance	(38)
☐ Cafeteria	(32)
☐ Business Services	(21)
☐ Administration	(19)
☐ Purchasing	(18)

[More](#)

If more than 10 matching values are available, select **Show more results** to display all matching values. Select **Show less results** to return to the first 10 matching values.

Search within facets is case-insensitive and supports wildcard characters. You can use the following wildcard characters:

Wildcard	Description
%(percent)	Matches any sequence of characters, including an empty string.
_ (underscore)	Matches any single character.
\ (backslash)	Treats the next character as a literal character instead of a wildcard.

This example illustrates the Show more results... control used to reveal more facet matching values.

▼ **Department**

☐ Information Services (238)

☐ Cafeteria (32)

☐ Admininstration (19)

☐ Purchasing (18)

☐ ST - General Ledger Accounting (4)

☐ ST - Accounts Receivable Dept (3)

☐ ST - Receiving Department (3)

☐ ST - Administration Department (2)

☐ Department AW01 (1)

☐ Eastern Sales Region (1)

Show more results

Click *Show more results...* to expand the list.

This example illustrates the Show less results... control used to reduce the facet values displayed.

▼ Department

☐ Information Services (238)

☐ Cafeteria (32)

☐ Admininstration (19)

☐ Purchasing (18)

☐ ST - General Ledger Accounting (4)

☐ ST - Accounts Receivable Dept (3)

☐ ST - Receiving Department (3)

☐ ST - Administration Department (2)

☐ Department AW01 (1)

☐ Eastern Sales Region (1)

☐ ST - Payroll Department (1)

[Show less results](#)

Once the entire list of facet values is expanded, click *Show less results...* to collapse the list, showing only the default values.

To clear the search text and restore the facet values, select the Clear button or remove the search text and press Enter. Escape key when search text field has focus also clears the search text and restore the facet values.

If no matching values are found, the facet displays a message indicating that no matching values were found and prompts the user to update the search text.

This example illustrates the message displayed when no matching values are found in a facet search.

▼ Department



No matching values were found. Update your search text.

Search within facets is also available for hierarchy facets. In a tree facet, when a child node matches the search text, its parent nodes are also displayed.

This example illustrates search within a hierarchy facet, where matching child values are displayed with their parent values.

▼ Location

▼ ☐ United States (39)

> ☐ West (20)

> ☐ Midwest (8)

☐ Swish Found. Rec Sol West Reg (1)

Note

Search within facets is available only for facets that display additional values through the **More** link. It is not displayed for facets where all values are already visible. Search within facets is not available for PivotGrid Search, Pivot Grid Viewer, or custom search pages.

As you drill into a set of facets, your path is expressed in the form of facet breadcrumbs.

This example illustrates the fields and controls on the Facet filter breadcrumbs.

Search Results

4 results - Keywords "program manager"

[Hide Filter Panel](#)

LEBU (x)

Office of Analysis - EComm (x)

Full-Time (x)

[Clear All](#)

You can deselect the check box for a filter to remove its effect on the search results, or to reverse the direction of your filtering and expand the results.

Click Clear all filters to remove all applied filters, returning the search results to the state prior to faceted filtering.

Viewing Search Results With Grid Format and List Format

Use the grid and list buttons to toggle between the grid format and the list format for viewing search results.

Field or Control	Description
	Enables you to switch the view of the search results between list format and grid format. The icon representing the current view is greyed out.

Working with the Grid Format

The following example displays the grid format:

This example illustrates the fields and controls on the Search Results in grid format. You can find definitions for the fields and controls later on this page.

Search Results
60 of 66 results - Keywords "program manager"
[Hide Filter Panel](#)

Business Unit		☐ Include History ☐ Correct History									
☐ TOABU (25) ☐ LEBU (23) ☐ HXBUI (16) ☐ GBIBU (1) ☐ KR001 (1)		☒  									
Department		Employee Photograph	Empl ID	Empl Record	Name	First Name	Last Name	Second Last Name	Alternate Character Name	Middle Name	Related Actions
☐ Foreign Exchange Programs Div (15)			LE0007	0	Hsui,Lewiston Michael	Lewiston	Hsui	(blank)	(blank)	Michael	 
☐ Controller (12)			LE0003	0	Lyons,Margaret Kelly	Margaret	Lyons	(blank)	(blank)	Kelly	 
☐ Business Services (10)			LE0015	0	Zenith,Abigail Leigh	Abigail	Zenith	(blank)	(blank)	Leigh	 
☐ Office of Analysis - TComm (8)			LE0002	0	Keyes,Sharon MIDDLE NAME	Sharon	Keyes	(blank)	(blank)	MIDDLE NAME	 
			LE0011	0	Thompson,Candace Lynne	Candace	Thompson	(blank)	(blank)	Lynne	 

To navigate to the page loading the desired data, select the row.

Working with the List Format

The following example displays the list format:

This example illustrates the fields and controls on the Search Results in list format. You can find definitions for the fields and controls later on this page.

▼ Search Results
66 results - Keywords "program manager"
[Hide Filter Panel](#)

▼ Business Unit

☐ TQABU (25)

☐ LEBU (23)

☐ HXBU1 (16)

☐ GBIBU (1)

☐ KR001 (1)

▼ Department

☐ Foreign Exchange Programs Div (15)

☐ Controller (12)

☐ Business Services (10)

☐ Office of Analysis - TComm (8)

Job Data: Abigail Zenith | Empl ID: LE0015 | Empl Rcd: 0

Business Unit: LEBU | Department: Plannin & Comm.Relations - E | Job Title: **Manager - Programs Planning** | Location: National Office | Full/ Part Time: Full-Time

Job Data: Margaret Lyons | Empl ID: LE0003 | Empl Rcd: 0

Business Unit: LEBU | Department: Office of Analysis - TComm | Job Title: **Manager - Program Analysis** | Location: National Office | Full/ Part Time: Full-Time

Job Data: Candace Thompson | Empl ID: LE0011 | Empl Rcd: 0

Business Unit: LEBU | Department: Office of Analysis - EComm | Job Title: **Manager - Program Analysis** | Location: National Office | Full/ Part Time: Full-Time

Job Data: Lewiston Hsui | Empl ID: LE0007 | Empl Rcd: 0

Business Unit: LEBU | Department: Plannin & Comm.Relations - T | Job Title: **Manager - Programs Planning** | Location: National Office | Full/ Part Time: Full-Time

To navigate to the page loading the desired data, select the row.

If the list view contains sensitive or PII data, list view is not displayed. For more information on masking of sensitive data, refer to [Masking of Data in Search Results](#).

Note
The default search result display format for Global Search is the list format.

Working with Related Actions

For components mapped to search definitions, end users can navigate to related actions defined for that component from search results without accessing the main result document. The related actions indicator appears if you've selected the **Show Related Actions in Search Results** field on the Search Configuration page.

Note
The related actions indicator appears only for component-level related *actions*. It does not appear for page-level related actions or for related *content*. Also, end users will only view related actions to which they have access. If there are none for that search result, the related actions indicator does not display.

This example illustrates the fields and controls on the Related actions indicator. You can find definitions for the fields and controls later on this page.

	LE0007	0	Hsui,Lewiston Michael	Lewiston	Hsui	(blank)	(blank)	Michael		
---	--------	---	-----------------------	----------	------	---------	---------	---------	---	---

By clicking on the related actions indicator, a related actions popup appears, showing the possible related actions for that user, according to security access.

After clicking a related action, the system displays the target related action as configured by the application (as in, in a modal window, a new browser window, and so on). The system displays the related action interface with the information associated with the search result displayed.

Related Topics

- [Configuring a Search Page](#)
Use the Search Configuration page to configure a search page and specify how the configured search page should appear for an end user to interact with when accessing the component.

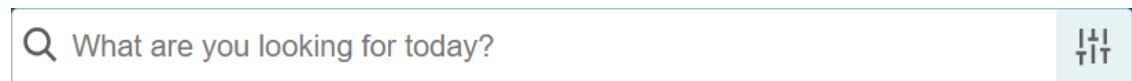
Working with Search Results in Fluid User Interface

This section discusses the search results in fluid user interface and the search results on small form factor devices.

Working with Search Results in Global Search

End users use the Global Search bar available on the header to launch global search where they can enter their search criteria. Global Search provides a way for a user to search across all search indexes or a specific group of search indexes.

This example illustrates the Global Search bar.



After running a search using the Global Search bar, the system presents the search results in an intuitive display, enabling interactive filtering and further navigation.

This example illustrates the fields and controls on the Global Search results page. You can find definitions for the fields and controls later on this page.

New Search

Search In

General Ledger

Keywords

CROTH

More Options

Search

Clear

Business Unit

US001 (3)

Journal Date

More

Journal Status

Valid Journal - Edits Complete (2)

Posted to Ledger(s) (1)

Source

AP (2)

ONL (1)

View Search Results

3 results for keyword: "CROTH"

3 rows

Journal - US001 | 0000000477 | 2016-06-15

Journal: Integration with EPM - June 20 | Status: P | Source: ONL | Total: 360080.63 USD | Lines: 22 | Entered by: CROTH

Journal - US001 | APPE000164 | 2009-07-31

Journal: Period End Accruals | Status: V | Source: AP | Total: 1042.5 USD | Lines: 2 | Entered by: CROTH

Journal - US001 | APPE000165 | 2009-08-01

Journal: Period End Accruals | Status: V | Source: AP | Total: 1042.5 USD | Lines: 2 | Entered by: CROTH

The search results page has two panels: the left panel to display search options and facets and the right panel to display the search results.

Field or Control	Description
New Search	The new search area enables you to initiate a new search by selecting a search category and entering keywords. Note: A blank search is not supported. That is, you must enter valid search criteria.
Facets	Facets are attributes used to filter and narrow down a set of search results. You can select a single facet value or you can select multiple facet values. For more information on facets, see the section on Using Facets later in this topic.
	Use the Hide Filters button to collapse the left panel so that the right panel occupies the entire real estate of the page. Toggle the button to expand the left panel.
Number of returned rows	The total number of rows that match a keyword in the selected search category is displayed at the top of the search page. The Global Search results page shows only the first 50 rows (default) of search results for performance reasons. You can configure the search page to display more rows, that is, to intentionally change the default number of rows, navigate to the PeopleTools Options page. If the total number of rows is greater than 50 rows, you can use the facets in the left panel to filter the desired information.
	If any bulk related actions are defined for a component, the bulk related actions indicator appears at the top of the search results page.

Field or Control	Description
Images	Images can be configured to appear with the search results. If any of the search results is configured to display an image, the title and summary of a search result is indented. See Working with Images .
Related Actions Indicator	If any related actions are defined for the pages of a component, the related actions indicator appears to the right of the search result. Clicking the related actions indicator displays a popup containing the defined related actions.

Using New Search

Users select a search category and enter a search criteria to search for content. Advanced users can leave the search text box blank and click the Search button to display the advanced search options.

Use the More Options control to display additional fields to specify the search criteria. If a search category is not selected, the general set of search fields are displayed. If a search category is selected, the general set of search fields and a set of search fields specific to the selected search category are displayed. For example, if you select Navigator as the search category, you see the general set of search fields and additional fields that are specific to the Navigator search category. Clicking the Fewer Options control collapses the additional search fields.

The additional search fields display default operators for each search field. Use the Show Operators link to display additional operators for each search field. Clicking the Hide Operators control collapses the additional operators.

Note

When you use the contains operator, enter a complete word or a set of words, for example desktop or desktop computer. You can also use wild card characters, but the wild card characters can be used only within a word or at the end of a word. Examples of valid search text containing wild cards: t*st, test*.

The Clear button allows you to clear the search criteria that you entered. However, along with the search criteria, the search results are also cleared enabling you to create a fresh search.

This example illustrates the advanced search fields.

▼ **New Search**

Search in

Menu ▼

Keywords

With this Exact Phrase

With any of these Words

Exclude

Menu Item Label (contains)

Description (contains)

Folder Label (contains)

Source Application (contains)

Fewer Options

Show Operators

Search

Clear

Using Facets

By default, on Global Search results page and the component search results page, you can choose multiple facet values to filter or narrow down your search results. You can use the check boxes under a facet to select multiple facet values. For example, in the Department facet, you can choose multiple departments, such as Finance, Human Resources, and so on.

In hierarchical facets too, multi-facet selection is enabled by default. you can choose multiple facet nodes. In hierarchical facets, the facet nodes are displayed as a tree, and a blue check mark indicates the selected facet node. When you select a parent node, the child nodes are not selected by default. If you select a child node after selecting a parent node, then the parent node is deselected automatically. The tree nodes are collapsed by default. If a child node is selected, then the parent node is expanded.

Under a facet (including hierarchical facet), when you select a facet filter, the selected facet filter moves to the top of the facet filters, that is, the selected facet filter is displayed above the non-selected facets. The movement of selected facet filters to the top affects the order of the facet filters. Each time you select a facet filter, the order of facet filters is rearranged to display the selected facet filter above the non-selected facet filters.

Note

The Category facet is set for single select. Multi-facet selection is always turned off for the Category facet.

Note

Only fluid search pages support selecting of multiple facet values or tree nodes. Classic or classic plus search pages do not support this option.

For information on enabling multiple facet-value selection, see [Selecting Facet Settings](#) and [Managing General Search Options](#).

As you drill into a set of facets, your path is expressed in the form of facet breadcrumbs.

The selected facets appear as breadcrumbs in the order you choose the facets. For a hierarchical facet, individual breadcrumb is displayed for each selected tree node.

Facets display 10 values by default. If a particular facet has more than 10 facet values, *More* appears at the bottom of the list. To collapse the expanded facet list, select *Less*.

This example illustrates search results based on multiple facet values and illustrates the display of breadcrumbs.

Search Results

> New Search

My Association

- ☐ Created by Me (10)
- ☐ Hiring Manager (4)
- ☐ Primary Hiring Manager (4)
- ☐ Team Member (4)

Department

- ☒ Human Resources (12)
- ☐ All Depts for City of Nelson (4)
- ☐ Benefits (2)

Job Family

- ☒ Human Resources (8)
- ☒ Administrative Support (2)
- ☒ Environmental Health & Safety (2)
- ☐ RS Administrative Job Family (12)

Location

- ☐ Corporation Headquarters (10)
- ☐ United States (2)

Job Posted In

- ☐ 2012 (1)
- ☐ 2009 (1)
- ☐ 2008 (2)

View Search Results

12 results for keyword: "specialist"

Human Resources Administrative Support Environmental Health & Safety Clear All

12 rows

Job Posting: Employment Specialist Job ID: 290102 Type: Internal Posting	⊙
Recruiting Location: Corporation Headquarters Department: Human Resources Job Family: Human Resources	
Job Posting: Employment Specialist Job ID: 290102 Type: External Posting	⊙
Recruiting Location: Corporation Headquarters Department: Human Resources Job Family: Human Resources	
Job Posting: HRIS Specialist Job ID: 30017 Type: External Posting	⊙
Recruiting Location: Corporation Headquarters Department: Human Resources Job Family: Human Resources	
Job Posting: HRIS Specialist Job ID: 30017 Type: Internal Posting	⊙
Recruiting Location: Corporation Headquarters Department: Human Resources Job Family: Human Resources	
Job Posting: Labor Relations Specialist Job ID: 100081 Type: External Posting	⊙
Recruiting Location: Corporation Headquarters Department: Human Resources Job Family: Human Resources	
Job Posting: Health & Safety Specialist Job ID: 290097 Type: External Posting	⊙
Recruiting Location: Corporation Headquarters Department: Human Resources Job Family: Environmental Health & Safety	
Job Posting: Health & Safety Specialist Job ID: 290097 Type: Internal Posting	⊙
Recruiting Location: Corporation Headquarters Department: Human Resources Job Family: Environmental Health & Safety	
Job Posting: HRIS Specialist-30017 Job ID: 300033 Type: Internal Posting	⊙
Recruiting Location: Corporation Headquarters Department: Human Resources Job Family: Human Resources	
Job Posting: HRIS Specialist-30017 Job ID: 300033 Type: External Posting	⊙
Recruiting Location: Corporation Headquarters Department: Human Resources Job Family: Human Resources	
Job Posting: HRIS Specialist-10021 Job ID: 300031 Type: External Posting	⊙
Recruiting Location: Corporation Headquarters Department: Human Resources Job Family: Human Resources	

If a facet contains sensitive or PII data, the facet is not displayed. For more information on masking sensitive data, refer to [Masking of Data in Search Results](#).

Using Related Actions

For components, related actions can be defined at component level or at page level. End users can navigate to related actions defined for that component from search results without accessing the main result document.

When component-level and page-level related actions are available for a search result, the page-level related actions take precedence and you see the related actions indicator alongside a search result and the bulk mode indicator at the top of the search results.

By clicking the related actions indicator, a related actions popup appears, showing the possible related actions for that user, according to security access.

After clicking a related action, the system displays the target related action as configured by the application (as in, in a modal window, a new browser window, and so on). The system displays the related action interface with the information associated with the search result displayed.

This example illustrates the Related Actions indicator.

Job Posting: HRIS Specialist | Job ID: 30017 | Type: External Posting

Recruiting Location: Corporation Headquarters | Department: Human Resources | Job Family: Human Resources

⊙

The bulk related actions indicator appears when a search result has bulk related actions defined at the component level. When you click the Bulk mode icon, you see an Actions button with the related actions indicator and check boxes to the right of the search results. You perform a bulk mode action by selecting a search result or search results and by selecting the required bulk action from the related actions list.

Working with Real-time Component Search Results

Fluid user interface enables users to create tiles to access a component. In a similar manner, tiles can be created for a real-time component search enabling you to access the component search without having to navigate to a component.

To configure real-time component search, you must create a pivot grid. In Application Designer, you need to specify the component properties for fluid search page. A component configured for real-time search can be set to use either a master detail or a standard search type page.

Note

In fluid user interface, the real-time component search results are meant to work only with tiles, not with classic pages.

See Fluid User Interface Developer's Guide: Setting up Real-Time Search for Fluid Components and Fluid User Interface Developer's Guide: Setting Component Properties for Search Options.

You can use configurable search to configure standard or keyword search configuration for a component. See [Guidelines on Using Configurable Search for Fluid Components](#).

This example illustrates the fields and controls on the Real-time Component Search Results page. You can find definitions for the fields and controls later on this page.

View Items MD
51 results found.

Chart ☐ No ☒ Yes

51 rows

SetID	Actions	Item	Item Group	Category ID	Desc	Family
CRM01		10000	REFRIGERATOR	00004	Refrigerator, Plastic Bins	REF ACCSRS
CRM01		10001	REFRIGERATOR	00004	Refrigerator, Shelves	REF ACCSRS
CRM01		10002	REFRIGERATOR	00004	Refrigerator, Ice Trays	REF ACCSRS
CRM01		10003	REFRIGERATOR	00004	Refrigerator, Ice Dispenser As	REF ACCSRS
CRM01		10004	REFRIGERATOR	00004	Refrigerator, Compressor	REF REP PT

Field or Control

Description

New Search

The new search area enables you to initiate a new search by selecting a search category and entering keywords.

Facets

Facets are attributes used to filter and narrow down a set of search results.

You can choose to view the facets as a chart.

Facet Sort

Use facet sort to alphabetically sort the facet attributes in an ascending or descending order.

Field or Control	Description
Grid view	Displays the search results in a grid format. In a grid view, related actions, if defined, always appears as the second column of the grid. In a grid view, bulk related actions, if defined, always appear as the first column of the grid.
List view	Displays the search results in a list. In a list view, a title and a summary is displayed for each search result. The related actions indicator is always displayed on the right of the search result. When you click Bulk mode, the bulk related actions check box appears to the right of the search result. If a list view contains sensitive or PII data, the list view is not displayed. For more information on masking sensitive data, refer to Masking of Data in Search Results.
Bulk mode	If the search definition is mapped to a component, and if there are any defined bulk related actions associated with that component, the bulk related actions indicator appears at the top of the search results page. Use the Bulk mode to toggle between displaying bulk related actions and exiting the bulk mode.
Add	Enables you to add new rows to PeopleSoft tables. The Add button is similar to the Add a New Value page in a classic environment. Note: The Add button is not available on small form factor devices.
Chart	Enables you to view the search results in a chart format.
Options Menu	Use the Options Menu to: • Update filters. • Change chart options. • Export data to a spreadsheet. • Save the search with the applied filters so you can access the same search again. The search is saved for a user ID. • Change the sort options.
Related actions indicator	If any related actions are defined for the pages of the component, the related actions indicator appears to the right of the search result. Clicking the related actions indicator displays a popup containing the defined related actions. If you use configurable search to configure search for a component, you can choose whether to display related actions or not on the search results page. Administrators set this option on the Search Configuration page. See Working with Configurable Search.

When you click a real-time component search tile, the search results are automatically displayed without you having to enter any search criteria. Real-time component search uses default search criteria, which is defined in the following:

- Record field properties.
- PeopleCode - SearchInit.
- Pivot Grid.

For more information on defining default search criteria, see Fluid User Interface Developer's Guide: Setting up Real-Time Search for Fluid Components.

A real-time component search page can display a maximum of 100 rows of search results. This value can be configured.

Images can be displayed along with the search results if you configure to display images.

Master Detail Real-time Component Search

If you choose master detail as the search type for a component, when you create the pivot grid for the component, you must ensure that you select either Grid and List or List. List view is mandatory for a master detail search page because the search results are displayed in list view in the left panel when you drill into a search result.

This example illustrates the Master Detail Real-time Component Search page.

Group Box	
10009 - Air Cond, Compressor	SetID CRM01
10009-A - Substitute item for 10009	Item ID 10011
10010 - Air Cond, Fan	Description Air Cond, Control Unit
10011 - Air Cond, Control Unit	Short Description Air Cond,
10012 - Air Cond, Air Handler Duct	Item Group AIR CONDITIONER
10013 - Air Cond, Pipes	Family AC REP PRT
10014 - Air Cond, Ducts	Category ID 00001
SR1001 - 6600 BTU Room Air (Light Beige)	Date Added 03/16/2001
SR1002 - 6000 BTU Room Air (Grey)	User ID DVP1
	Approval Date 03/16/2001

To traverse through the search results, you can use either the search results in the left pane or the Previous in List and Next in List buttons (guided mode buttons) at the top-right corner of the screen.

To return to the search results page, use the Back (Search Results) button.

Standard Real-time Component Search

If you select the standard search type for a component, selecting List view is optional.

When you drill into a search result, component displays on the page. The search results are not displayed in the left panel. To traverse through the search results, you use the Previous in List and the Next in List (Guided mode) buttons.

Accessing Keyword Component Search

If a component is configured for both real-time search and keyword search, you can access keyword search using the Global Search icon when you are on the real-time search results page. The search category drop-down automatically displays the component from where you launched the keyword search and allows you to search for content within the component.

Related Topics

- Pivot Grid: Understanding Component Real Time Search
- Pivot Grid: Creating a Component Pivot Grid Model Using the Pivot Grid Wizard

Working with Keyword Component Search Results

You can enable Keyword Search on a component. Keyword search is a PeopleTools Search Framework search.

See Fluid User Interface Developer's Guide: Setting up Keyword Search for Fluid Components.

The fluid user interface enables you to create a tile to launch a component that is configured for keyword search.

Consider the following when you configure a component for keyword search:

- If you configure a component for real time and keyword search, you can set real-time search to be the default, so you can access the keyword search from the real-time search results page.
- If you set keyword search as the default, you must create separate tiles to launch real-time and keyword search on the component.

A keyword search page enables you to enter search criteria to initiate your search.

You can use configurable search to configure standard or keyword search configuration for a component. See [Guidelines on Using Configurable Search for Fluid Components](#) and [Working with Configurable Search](#).

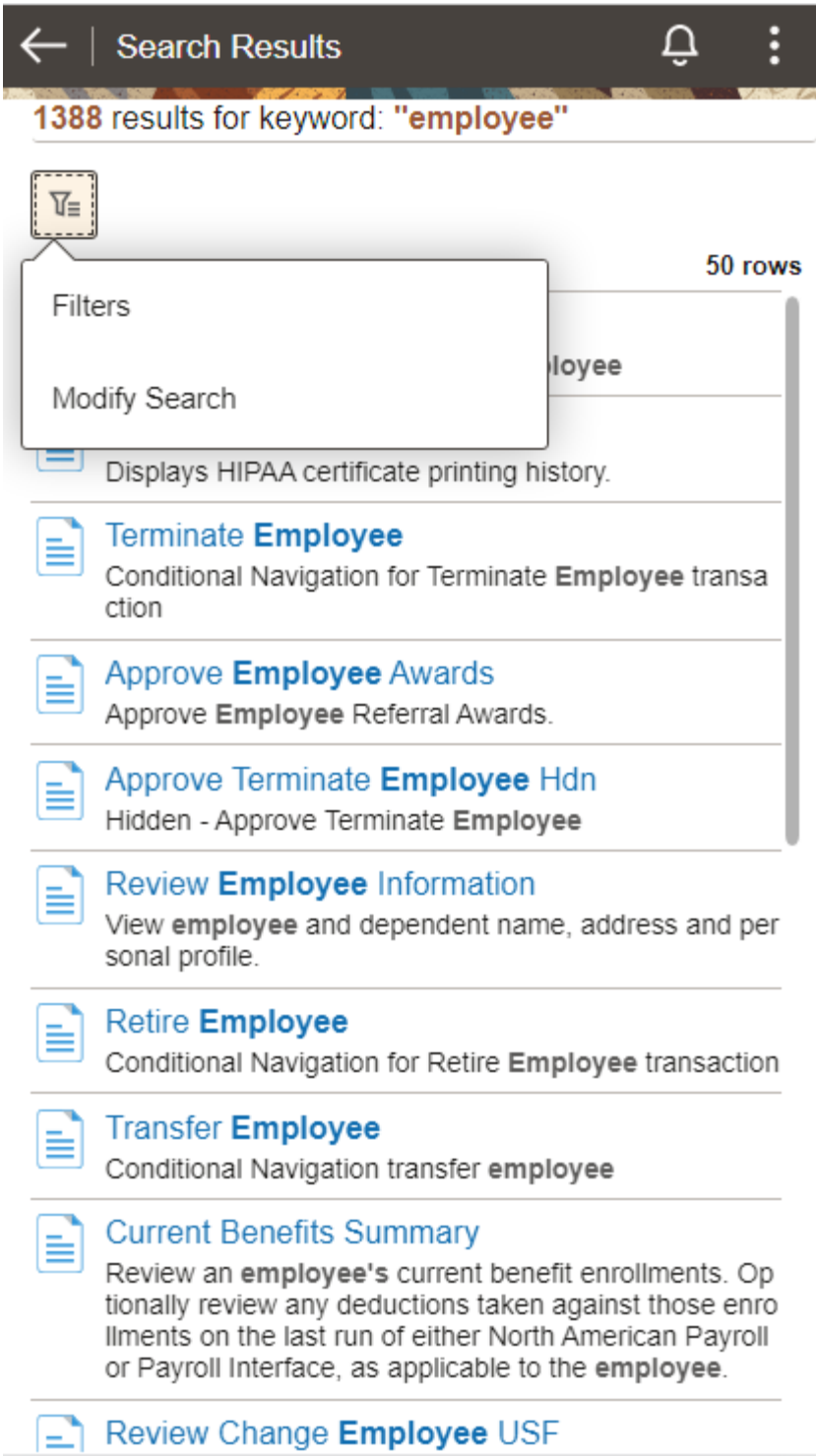
Working with Search Results on a Touch Friendly Device

On small form factor devices, the search results display varies from desktop or tablet display.

The following search results features are available on small form factor devices:

- Initiate global search using the Search option in the Actions menu.
- Search results are displayed in list and chart view. List is the default view.
- Filter options and search criteria options are available on the options icon.
- Selected filters are listed in the Selected Filters button.
- In real-time component search, advanced search options are not available.
- In component search, the Add button is not available.
- Related actions and bulk related actions are not available.

This example illustrates the fields and controls on the Global Search Results page. You can find definitions for the fields and controls later on this page.



Field or Control	Description
	Click the options icon to display the Filters and Modify Search options.

Field or Control	Description
Filters	Displays the available facets and enables you to filter the search results.
Modify Search	Displays the New Search panel that allows you to enter search criteria.
	On the search results page, use the back button to return to the previous screen. For example, when you drill into a search result, use the back button to return to the search results page.

Masking of Data in Search Results

PeopleSoft provides the ability to mask personally identifiable information (PII) or sensitive data in the search results on classic and fluid search pages (component keyword search results and component real-time search results), and includes classic and fluid prompt page search results. If list view of the keyword search results page contains sensitive data, the list view is removed and if a facet contains sensitive data, the facet is removed.

To mask PII or sensitive data and to remove list view and facets, you can use the PeopleCode methods and functions.

See PeopleCode API Reference: SetDisplayMask method: Field class, PeopleCode API Reference: CopyDisplayMask method: Field class, PeopleCode Language Reference: SetFacetNamesToRemove function, PeopleCode Language Reference: SetRemovelistView function.

Note the following when you mask sensitive data for search results or prompt page search results:

- Use the data masking methods in the SearchInit event PeopleCode of any SearchKey field.
- In a method when you specify the number of trailing characters to be unmasked, the unmasked characters are always on the right irrespective of the left to right or right to left language selection.
- If field type is Date, the mask is applied on the formatted date value (as per user preference).
- When masking is applied, it uses field length; not data length. For example, if field length is 8 characters, and you set the trailing unmasked characters as 4, and the field data is *abcdef*, masking display as *****cdef*.
- If a masked field has translate values, it displays ten asterisks (*).
- In component real-time search, a chart is not displayed if any field marked for masking forms the x-axis or series of the chart. The facet filters and grid displays the data with masking applied on the field. However, in Pivot Grid Viewer, you can view the chart because PeopleCode is not executed.
- For data masking in fluid prompt pages, the prompt table search key record field property All Search Events for Prompt Dialogs should be selected. By default, the property is not selected. SearchSave and SearchInit PeopleCode gets executed only when this record field property is selected.
- After drilling into a search result, if any key field is masked, then the field is set to blank when you return to the search page by selecting the Return to Search button.

- In a grid, sorting is performed on the actual data, not the masked data.
- In search criteria, masked field is disabled. End user cannot edit the masked search criteria field value.
- A field that is disabled but not masked is removed from the search result grid view.
- A field that is disabled and masked (SetDisplayMask method is called on the field) is not removed from the search result grid. Instead, that column displays masked data.

If the SetDisplayMask method is called on a search record field, then the field is displayed in grid view with masking format applied, even if it is a disabled field.

This example illustrates a search results page with masked values for the National ID field.

Search Results

View All 1-43 of 43

Empl ID	Reference Record	Company	Name	Alternate Character Name	Middle Name	National ID	First Name	Last Name	Second Last Name	Payroll Status
CFG0300	0	CFG	Jenny Dohms	(blank)	(blank)	*****8874	Jenny	Dohms	(blank)	Active
CFG0301	0	CFG	Jack Brent	(blank)	(blank)	*****8817	Jack	Brent	(blank)	Active
CFG0302	0	CFG	Tom Ardy	(blank)	(blank)	*****8825	Tom	Ardy	(blank)	Active
CFG0303	0	CFG	Jessica Snell	(blank)	(blank)	*****8833	Jessica	Snell	(blank)	Active
CFG0304	0	CFG	Bob Alan	(blank)	(blank)	*****3744	Bob	Alan	(blank)	Active
CFG0305	0	CFG	Andy Miller	(blank)	(blank)	*****8841	Andy	Miller	(blank)	Active
CFG0306	0	CFG	Holly Fright	(blank)	(blank)	*****8858	Holly	Fright	(blank)	Active
CFG0307	0	CFG	Joe McCauly	(blank)	(blank)	*****8866	Joe	McCauly	(blank)	Active
CFG0308	0	CFG	Angela Lee	(blank)	(blank)	*****9179	Angela	Lee	(blank)	Active
CFG0309	0	CFG	Ann Ratcliffe	(blank)	(blank)	*****8254	Ann	Ratcliffe	(blank)	Active

Note

Search results initiated from the Search Test page are not masked.

Masking of Data in Search Results for Global Search

PeopleSoft provides the ability to mask personally identifiable information (PII) or sensitive data for a restricted user in keyword search for global search.

Note the following when you mask sensitive data for restricted users:

- When a user enters keywords to search for data, and if the keywords are marked as PII or sensitive data, then search results will not be displayed.
- If a facet contains sensitive data, the facet is hidden for the restricted user.

Monitoring PeopleSoft Search Framework and OpenSearch

Understanding Monitoring of Search Framework and OpenSearch

Beginning with PeopleTools 8.60.07, PeopleSoft Search Framework uses OpenSearch Dashboards, an open-source analytics and visualizations platform, to monitor and provide analysis on Search Framework and OpenSearch. Search Framework uses OpenSearch 3.2.0 and OpenSearch Dashboards 3.2.0 and enables application developers to monitor the PeopleSoft application data through the application indexes in OpenSearch.

OpenSearch Dashboards is a Web application and provides visual reports in the form of charts, tables, etc. based on queries that you set up on OpenSearch indexes.

In the PeopleSoft implementation, Search Framework uses OpenSearch Dashboards to provide data on system metrics and indexing metrics and PeopleSoft application data. It provides real-time data as well as historical data. In the context of search functionality, users need real-time data to understand how their system is performing and to track errors, if any, in indexing. Historical data provides an insight into the performance of the system over a period of time and in the context of indexing proves to be an useful tool to analyze indexing statistics.

This topic aims to provide you instructions and information on using OpenSearch Dashboards only with respect to its implementation in PeopleSoft Search Framework. Therefore, some of the capabilities of OpenSearch Dashboards may not be described in this topic. If you need more information on any of the capabilities of OpenSearch Dashboards, you should refer to the OpenSearch Dashboards documentation [3.2.0], which is available on www.opensearch.org.

OpenSearch Dashboards Terminology

OpenSearch Dashboards uses the following terminology:

OpenSearch Dashboards Terminology	Description
Dashboard	A collection of visualizations. You can arrange the visualizations within a dashboard and share a dashboard.
Visualization	A visualization is based on search-engine queries on the indexed data. A visualization is in the form of charts, maps, tables, etc.
Index pattern	Index pattern tells OpenSearch Dashboards which search-engine indexes you want to explore. An index pattern can match the name of a single index, or include a wildcard (*) to match multiple indices. Refer to the OpenSearch Dashboards documentation [3.2.0], Managing Indexes, Index State Management.

OpenSearch Dashboards Terminology	Description
Attribute	An attribute in PeopleSoft Search Framework corresponds to a search field in OpenSearch and OpenSearch Dashboards.

Understanding Dashboards and Visualizations

A dashboard is a collection of visualizations and searches. A visualization is based on search-engine queries on the indexed data. These visualizations are in the forms of charts, maps, tables, etc. PeopleSoft Search Framework delivers three system-monitoring dashboards, and each of the dashboards display two or more visualizations. For a list of delivered dashboards and visualizations, see [Delivered Dashboards and Visualizations](#).

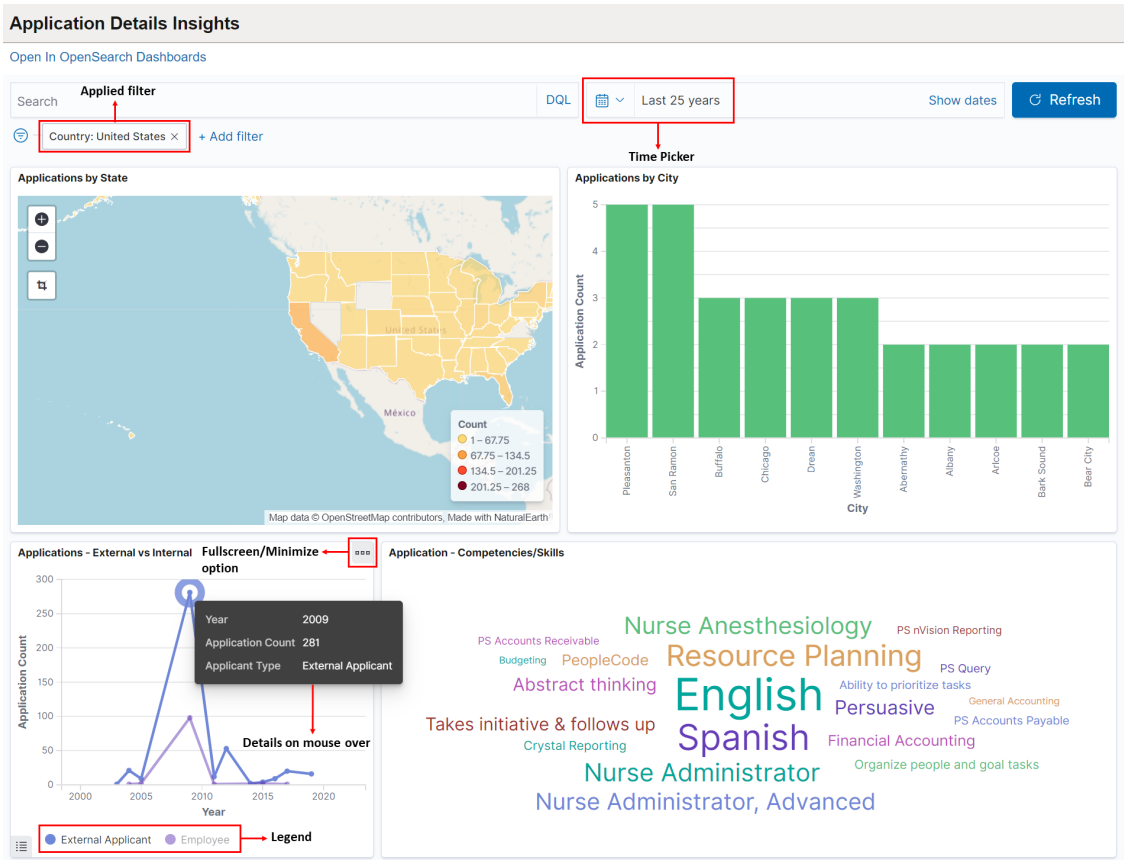
Search Framework enables you to create your own visualizations for PeopleSoft application data. Search Framework does not deliver any dashboard or visualization on application data, but in future PeopleSoft applications will implement some. Based on your business requirements, you may build your own dashboards and create visualizations. Typically, an application developer creates the dashboards and visualizations in OpenSearch Dashboards and imports them into PeopleSoft. These dashboards can be configured as a tile or as related information in a PeopleSoft application component. An end-user needs to add this tile to a home page. A dashboard configured as related information appears based on the users access to the component.

For instructions on creating visualizations, refer to [Creating a Visualization for Application Data](#).

Common Elements on a Visualization

This topic discusses some of the common elements on the visualization. For more information on the other elements on the OpenSearch Dashboards visualizations, refer to the OpenSearch Dashboards documentation [3.2.0], which is available on www.opensearch.org.

This example illustrates the common elements on Visualizations. You can find definitions for these common elements later on this page.



Term	Definition
Applied Filter	Use the filter option to filter data on the visualization.
Time Picker	Use the Time Picker area to restrict the search results to a specific time period. The time picker enables you to set the filter to view real time data and historical data.
Fullscreen/Minimize Option	Use the Fullscreen/Minimize Option button to enlarge the selected visualization.
Legend	OpenSearch Dashboards randomly uses different colors in a legend. You can collapse the legend if you want more real estate on the selected visualization.
Details on mouse over	Hover the mouse over a chart to view details.

Generating Reports

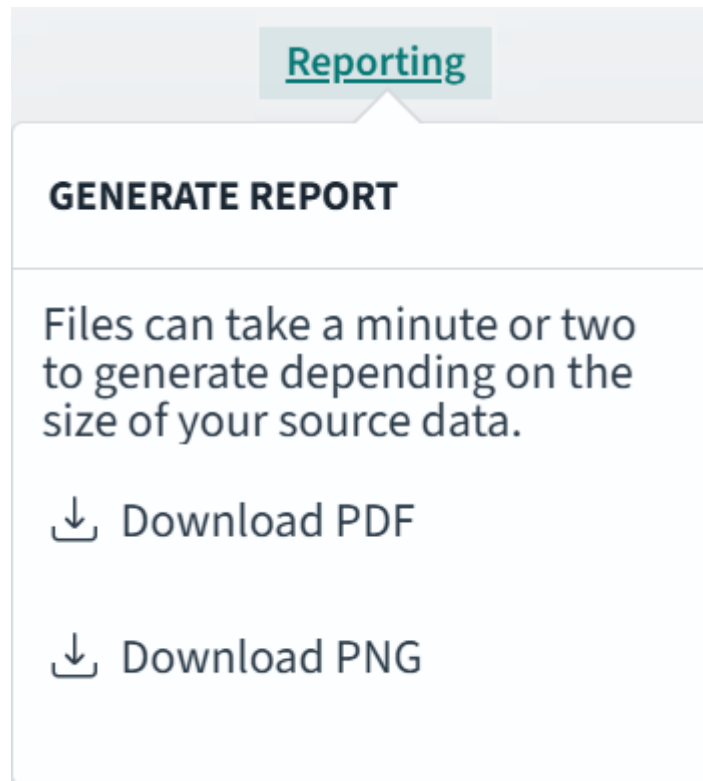
Search Framework enables you to generate PNG, PDF, and CSV reports.

When a dashboard displays in full view in PeopleSoft, the Reporting link enables you to download PNG and PDF reports.

Note

Depending on the size, reports may take a few minutes to generate asynchronously in the background. A notification displays when your report is ready to download.

This example illustrates the options for generating reports.



If you're creating a report from the Discover page, choose Generate CSV. To know more about generating reports, refer to the OpenSearch Dashboards documentation [3.2.0], which is available on www.opensearch.org.

Important

CSV reports have a non-configurable 10,000 row limit. They have no explicit size limit (for example, MB), but extremely large documents could cause report generation to fail with an out of memory error from the V8 JavaScript engine.

Setting Up OpenSearch Dashboards in PeopleSoft Search Framework

Before you can begin to set up OpenSearch Dashboards for use in Search Framework, you should complete some prerequisites, such as the installation of PeopleTools 8.62.01 or later and latest OpenSearch DPK.

To set up OpenSearch Dashboards to provide data on Search Framework, OpenSearch, and PeopleSoft application data, you need to complete the following steps:

1. Install OpenSearch Dashboards.
2. Connect OpenSearch Dashboards to the OpenSearch server.
3. Start OpenSearch Dashboards service.

Note

These instructions assume that PeopleTools 8.62.01 or later and latest OpenSearch DPK are installed in your environment.

Installing OpenSearch Dashboards

Search Framework supports the installation of OpenSearch Dashboards on Windows and Linux.

To install OpenSearch Dashboards, you use the delivered OSK DPK. For instructions on installing OpenSearch Dashboards, refer to the *PeopleSoft Deployment Packages Installation for Search Components* for the current release.

Important

For the implementation of OpenSearch Dashboards with PeopleSoft, OpenSearch Dashboards is delivered as part of OSK DPK because a security module is built into it. Therefore, you must use OSK DPK to install OpenSearch Dashboards. For the implementation of OpenSearch Dashboards with PeopleSoft, do not install OpenSearch Dashboards from the opensearch.org website.

OpenSearch Dashboards is a Web-application, and you can install it on the same server where OpenSearch is installed or you can install it on a separate server.

Note

Oracle recommends that you install OpenSearch Dashboards on one of the OpenSearch nodes in the cluster to ensure better connectivity between OpenSearch and OpenSearch Dashboards.

Connecting OpenSearch Dashboards to OpenSearch

When you use the OSK DPK to install OpenSearch Dashboards, the installation script prompts you to specify the OpenSearch server that you want to connect to OpenSearch Dashboards. You can connect to the OpenSearch server that you are in the process of installing, or enter the credentials for a different OpenSearch server.

For OpenSearch Dashboards to be always available, you should ensure that the OpenSearch server it connects to is always up and running.

After installing OpenSearch Dashboards, you should complete the following tasks:

- Set up OpenSearch Dashboards for application data analytics.
- Set up OpenSearch Dashboards for monitoring system and OpenSearch metrics.

Setting Up OpenSearch Dashboards for Application Data Analytics

To set up OpenSearch Dashboards for application data analytics, you should update the OpenSearch Dashboards section of the Search Instance Properties page. You enter the host name and port of the server where OpenSearch Dashboards is installed.

For more information, see [Creating Search Instances](#).

Setting Up OpenSearch Dashboards for Monitoring System and OpenSearch Metrics

You should manually set up the connection between the OpenSearch search instance in PeopleSoft and the OpenSearch Dashboards monitoring server using the Configure Server page. For instructions on using the Configure Server page, see [Configuring the Monitoring Server](#).

When you use an OpenSearch cluster with three nodes, OpenSearch Dashboards is connected to only one node of the cluster. The system monitoring job that keeps track of the cluster statistics is activated in the first node provided in the search instance configuration. If there is a change in the primary node in the search instance, it is necessary to stop the monitoring job and then start the monitoring job by using the system monitoring flag on the Configure Server page.

Starting the OpenSearch Dashboards Service

On the Windows platform, after you install OpenSearch Dashboards, you need to start the OpenSearch Dashboards service. Refer to the *PeopleSoft Deployment Packages Installation for Search Components* for the current release.

To start OpenSearch Dashboards on Windows, perform the following steps:

1. Open a command prompt, and change directory to OSD_Home\bin.
2. Run `opensearch_dashboards.bat`.
3. The service status displays as `Listening` indicating that the service has started

On the Linux platform, after you install OpenSearch Dashboards, the OpenSearch Dashboards service is automatically started. You can use the following command to check the status of the service:

```
ps -ef | grep node
```

If the OpenSearch Dashboards service is not started, you can start the service by running `opensearch_dashboards.sh`

Configuring the Monitoring Server

Use the Configure Server page to establish a connection between OpenSearch Dashboards and the OpenSearch server where you want to index the system metrics, indexing metrics, and application data.

Access the Configure Server page by selecting **PeopleTools**, and then **Search Framework**, and then **Administration**, and then **Configure Monitoring Server**.

This example illustrates the fields and controls on the Configure Server page. You can find definitions for the fields and controls later on this page.

Configure Server

Monitoring Visualizations

OpenSearch

*Host Name

example.com

*Port

9200

SSL Option

Disable

*User Name

osadmin

*Password

OpenSearch Dashboards

*Host Name

example.com

*Port

5601

SSL Option

Disable

*Scan Interval(Sec)

5

*Purge Retention(Days)

7

Enable Index Metrics

☒

Enable System Metrics

☒

Save

OpenSearch

Field or Control	Description
Host Name	Enter the OpenSearch server where you want to index the system and indexing metrics. Note: This should be the OpenSearch server for monitoring purpose mapped to OpenSearch Dashboards during installation of OpenSearch Dashboards. You can use the same OpenSearch server where the application data is indexed or you can use a standalone server for the sole purpose of metric analysis. You can also specify the server in the opensearch_dashboards.yml file.
Port	Enter the OpenSearch server port that you specified during installation of OpenSearch.
SSL Option	Select an option based on whether SSL is enabled or disabled on the OpenSearch server. The default is Disable.
User Name	Enter the user ID for the OpenSearch admin user. The default is osadmin.
Password	Enter the password associated with the user name.

OpenSearch Dashboards

Field or Control	Description
Host Name	Enter the OpenSearch Dashboards server including the domain, which you want to set up as a monitoring server. The host name value can be a DNS name or an IP address
Port	Enter the OpenSearch Dashboards server port that you specified during installation of OpenSearch Dashboards.
SSL Option	Select an option based on whether SSL is enabled or disabled on the OpenSearch Dashboards server. The default is Disable.
Scan Interval(Sec)	Specify the time interval (in seconds) when system metrics will be retrieved from the OpenSearch server. For example, if you enter 10, system metrics will be retrieved every 10 seconds. The lowest time interval is 5 seconds, that is, you cannot specify a time interval lower than 5 seconds. Note: When you set the value for this property, you should consider the performance of the system.
Purge Retention Period(Days)	Specify the number of days to store the metrics data. For example, if you enter 7, the metrics data will be retained for 7 days.
Enable Index Metrics	Select Yes if you want indexing metrics to be collected for viewing and analyzing in the Indexing Metrics dashboard. The default is No. When you set it to Yes, the indexing metrics are sent to the configured server. PeopleSoft Search Framework delivers the following index for indexing metrics: ptsf_es_index_metric_yyyy_mm, where yyyy and mm indicates the year and month of the indexed data. The naming convention of the index ensures that the files do not grow too large over a period of time and also ensures that you can easily clean up the index files, if required.

Field or Control	Description
Enable System Metrics	Select Yes if you want system metrics to be collected for viewing and analyzing in the System Metrics dashboard. The default is No. When you set it to Yes, the orcl-monitor-plugin starts indexing the system metrics data of the OpenSearch server, which is configured as the primary search server on the Search Instance page. PeopleSoft Search Framework delivers the following index for system metrics: <code>ptsf_es_system_metric_yyyy_mm</code>, where <code>yyyy</code> and <code>mm</code> indicates the year and month of the indexed data. The naming convention of the index ensures that the files do not grow too large over a period of time and also ensures that you can easily clean up the index files, if required.
Save	When you select Save: • If you set the Enable System Metrics to Yes, the system metrics flag on the OpenSearch server is updated to enable the indexing of system metrics.. • On save for the first time, an index (<code>orcl_es_auth</code>) gets created on the OpenSearch server. The index stores the callback service URL for each PeopleSoft database. Note: To save the configurations, the OpenSearch and OpenSearch Dashboards servers must be running instances.

Monitoring OpenSearch System Metrics and Indexing Metrics

PeopleSoft Search Framework delivers three dashboards and each dashboard displays several visualizations that provide you real-time data as well as historical data. These visualizations enable you to analyze data and act upon any errors if any. For example, you can use the historical data to view the indexing process and analyze any failed transaction and rectify it, if needed.

This topic aims to provide you information on the dashboards that are delivered by PeopleSoft Search Framework. For information on the other capabilities of OpenSearch Dashboards, such as building dashboards, using Discover, using Visualize, etc., refer to the OpenSearch Dashboards documentation [3.2.0], which is available on www.opensearch.org.

After configuring the monitoring server as discussed in the Configuring the Monitoring Server topic, you can deploy the delivered system monitoring dashboards and visualizations.

This topic discusses the following:

- Deploy the system-monitoring visualizations.
- View the dashboards and visualizations.
- Create a system-monitoring visualization.

Using the Monitoring Visualizations Page

The Monitoring Visualizations page lists the dashboards that are delivered by PeopleSoft. Some of the delivered dashboards pertain to PeopleSoft Health Center that monitors the health and performance of PeopleSoft systems. Refer to Performance Monitor: Understanding PeopleSoft Health Center for a description of the dashboards.

Use the Monitoring Visualizations page to deploy the delivered system-monitoring and indexing-metrics dashboards and visualizations so that you can view the dashboards and visualizations. See [Delivered Dashboards and Visualizations](#) for a list of delivered dashboards and visualizations.

You can also use the Monitoring Visualizations page to import a system-monitoring or indexing-metrics dashboard or visualization that you have created in OpenSearch Dashboards. For more information on creating system-monitoring dashboards and visualizations, refer to [Creating a Monitoring Visualization](#).

Access the Monitoring Visualizations page by selecting **PeopleTools**, and then **Search Framework**, and then **Administration**, and then **Monitoring Server**, and then select the Monitoring Visualizations tab.

This example illustrates the Monitoring Visualizations page. You can find definitions for the fields and controls later on this page.

Configure Server

Monitoring Visualizations

Select a Dashboard and click on Import. Repeat the steps for all Dashboards. Click on Save.

☐ Name	File Name			
☐ Application Server	Application_Server.json	Import	+	-
☐ Health Center	Health_Center.json	Import	+	-
☐ Indexing Metrics	Indexing_Metrics.json	Import	+	-
☐ Indexing Summary	Indexing_Summary.json	Import	+	-
☐ Process Scheduler	Process_Scheduler.json	Import	+	-
☐ System Metrics	System_Metrics.json	Import	+	-
☐ Web Server	Web_Server.json	Import	+	-

Save

Deploy Visualizations

Field or Control	Description
Name	Select the Name check box if you want to select all the dashboards.

Field or Control	Description
Import	If you create a dashboard and visualization in OpenSearch Dashboards, the dashboard is listed on this page. Select the dashboard you created and select the Import button to import the dashboard with the associated visualization into PeopleSoft. You would use the Import option when you make any changes to the dashboards. New or modified dashboards need to be imported to PeopleSoft. The import option on the Monitoring Visualizations page should be used only to import the system-monitoring, indexing-metrics, and PeopleSoft Health Center dashboards. To import application data dashboards, see Importing a Dashboard.
Deploy Visualizations	To use the delivered system monitoring and indexing metrics dashboards, you should deploy the dashboards (and the associated visualizations) to OpenSearch Dashboards. On successful deployment of dashboards, the following message is displayed: Visualizations indexed successfully.
Save	Select Save when you import a dashboard that you've created or modified. Note: When you deploy a visualization or dashboard, you do not need to select Save.

Note

PeopleSoft Health Center delivers the Application Server, Health Center, Process Scheduler, and Web Server dashboards.

Delivered Dashboards and Visualizations

PeopleSoft Search Framework delivers the following dashboards and visualizations.

Note

Oracle recommends that you do not edit or delete the delivered dashboards and visualizations.

- Indexing Metrics dashboard provides statistics of the transactions and segments and displays the following visualizations:
 - Transaction Status
 - Transaction/Segment Count
 - Segment History

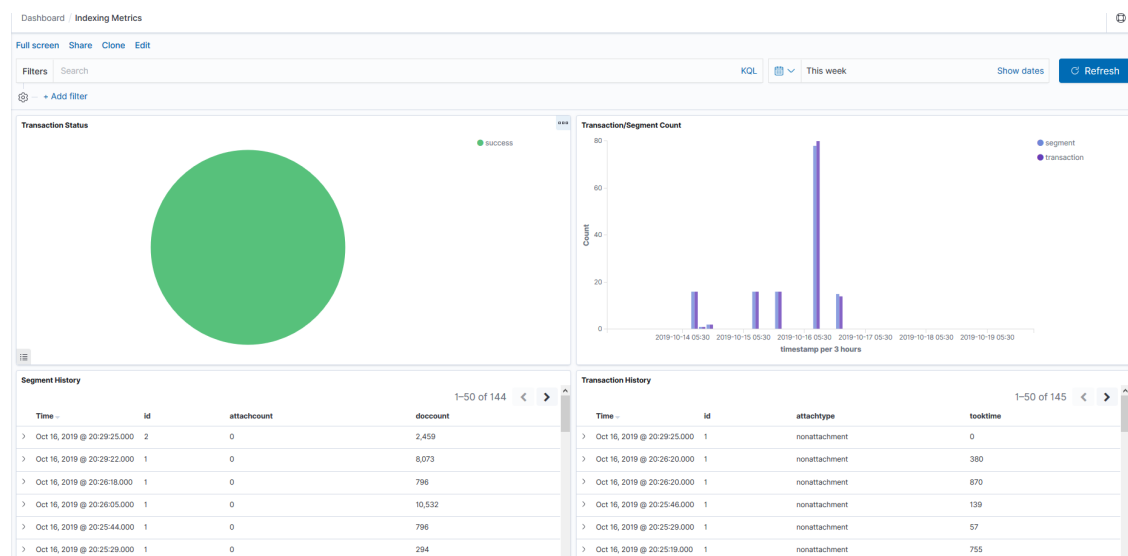
- Transaction History
- Indexing Summary provides data of the indexing count and time taken for indexing and displays the following visualizations:
 - IndexCount/Process
 - IndexTime/Process
 - Index Count
- System Metrics provides an overview of the health of the system and displays the following visualizations:
 - CPU (%) Utilization
 - Disk Space Utilization
 - JVM (%) Utilization
 - Total Indexed Documents

Using the Indexing Metrics Dashboard and Visualizations

Access the Indexing Metrics dashboard by selecting Dashboard, and then selecting Indexing Metrics from the list of dashboards.

The Indexing Metrics dashboard provides statistics on the transactions and segments during indexing.

This example illustrates the visualizations on the Indexing Metrics dashboard. You can find definitions for the visualizations later on this page.



Field or Control	Description
Transaction Status	Displays the status of transactions as a pie-chart. The transaction statuses are: • Success • Error - The transactions in Error status. Refer to the example described later in this section on the steps to troubleshoot these transactions. • Reject - Search Framework attempts to re-run the indexing for the transactions in Reject status. If the number of transaction in Reject status are high, it may indicate that the OpenSearch cluster has resource constraints. Selecting any of the slices from the pie-chart enables you to view only the transactions in the selected status in the Transaction Status visualization and the Transaction History visualization displays only the transactions of the selected status, thus enabling you to drill down to each transaction and view details of the transaction, such as process instance, index name, etc. For example, to drill down to the transactions that are in Error status and to understand why the transaction is in Error status, you can perform the following steps: 1. Select the Error status slice of the pie-chart. The Transaction History visualization displays only the transactions in the Error status. 2. Select a transaction. The transaction expands to display data in a tabular format. You can use the JSON tab to view it in raw JSON format. 3. Note down the process instance and the name of the index where the error occurred. Note:The name of the database forms the suffix for an index name. For example, ptportalregistry_xxxx, where xxxx refers to the database name. The database name is handy when you are monitoring multiple PeopleSoft applications, for example, HCM, FMS, etc. It is also handy when the same OpenSearch server is used in shared test environments of an application, for example, HCM, HCMdev, HCMTEST, etc. 4. Log on to PIA, and navigate to the Build Search Index page (select PeopleTools, and then Search Framework, and then Search Admin Activity Guide, and then Administration, and then Schedule Search Index) where you can use the process instance number to obtain information on the transaction in error.

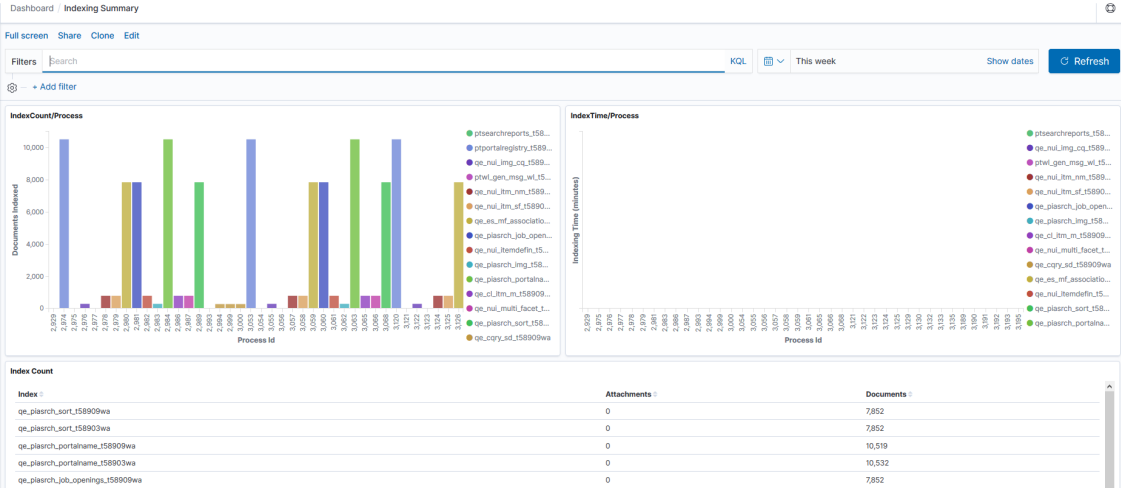
Field or Control	Description
Transaction/Segment Count	Displays the count of transactions and segment at a specific time period in the form of a vertical bar chart.
Segment History	Displays the segment history and includes the attachment count and document count in each segment.
Transaction History	Displays the transaction history and includes the attachment type (attachment or non attachment) in each transaction and the time taken for each transaction.

Using the Indexing Summary Dashboard and Visualizations

Access the Indexing Summary dashboard by selecting Dashboard, and then selecting Indexing Summary from the list of dashboards.

The Indexing Summary provides data on the indexing count and time taken for indexing.

This example illustrates the visualizations on the Indexing Summary dashboard. You can find definitions for these visualizations later on this page.



Field or Control	Description
IndexCount/Process	Displays the documents indexed for an index and the process instance ID as a vertical bar chart. If you want to view a particular index, you can use the Search area (at the top of the page) to enter the index name. For example, if you want to obtain information on the ep_ap_payments index, you enter <code>indexname:ep_ap_payments*</code> .

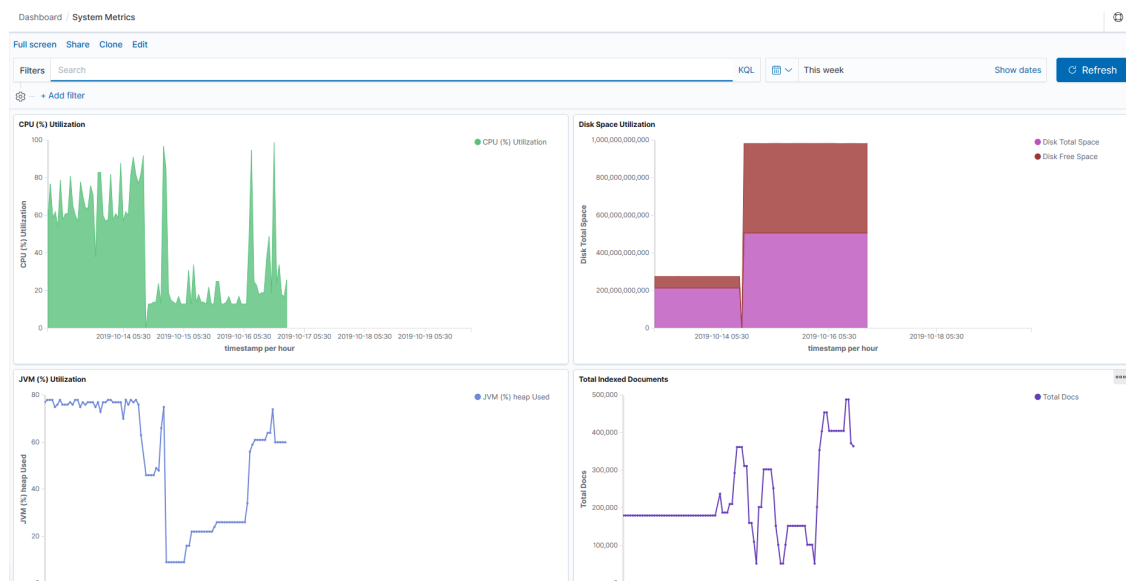
Field or Control	Description
IndexTime/Process	Displays the time taken for indexing documents for each index and the process instance ID as a vertical bar chart. If the document count is low, but the time taken is considerably high, then you should correlate with the System Metrics dashboard to observe whether the system was unstable.
Index Count	Displays the count of attachments and documents for each index in a tabular format.

Using the System Metrics Dashboard and Visualization

Access the System Metrics dashboard by selecting Dashboard, and then selecting System Metrics from the list of dashboards.

The System Metrics dashboard provides an overview of the system health, that is, you can view the real-time health of the system and also view the health of the system over a specific period of time in the past.

This example illustrates the visualizations on the System Metrics dashboard. You can find definitions for the visualizations later on this page.



Field or Control	Description
CPU (%) Utilization	Displays the CPU utilization over a specific period of time by the OpenSearch server in the form of an area chart.
Disk Space Utilization	Displays the total disk space and the free space available for use in the form of an area chart. The total memory is displayed in bytes.

Field or Control	Description
JVM (%) Utilization	Displays the total JVM percent used by the OpenSearch server in the form of a vertical bar chart.
Total Indexed Documents	Displays the total number of indexed documents over a specific period of time in the form of a line chart.

Creating a Monitoring Visualization

Search Framework delivers three dashboards and each dashboard contains two or more visualizations. Oracle recommends that you do not modify the delivered dashboards and visualizations. Each of these visualizations are built on index patterns, which must not be modified. The delivered visualizations monitor the important aspects of search, that is, indexing and system health. However, if your business requirements demand to include any other attributes (fields), you may use the delivered index patterns and build new visualizations.

This topic describes how you can use the delivered index patterns and build visualizations of your choice.

Creating a visualization involves the following high-level steps:

- Clone an existing dashboard.
- Create a visualization.

Cloning a Dashboard

To clone an existing dashboard, complete the following steps:

1. Access the Insights home page using the Insights menu under Reporting Tools.
See [Accessing PeopleSoft Insights](#).
2. In the left pane, select Dashboard.
3. From the list of dashboards, select a dashboard.
4. From the top-right corner, select Clone.

Alternatively, select Edit, and then select Save.

5. Enter a name for the cloned dashboard, and then select Confirm Clone.

The selected dashboard is cloned and it displays the same visualizations as the original dashboard. Now, you need to create visualizations for the new dashboard.

Creating a Monitoring Visualization

To create a visualization, complete the following steps:

1. Select Visualize, and then select the plus (+) icon to add a visualization.
2. On the Select visualization type page, select a chart type.

Choose a chart type to display the visualization, such as, tabular form, pie chart, bar chart, gantt chart, and so on. To know more about the chart types, refer to OpenSearch Dashboards documentation[3.2.0], Building data visualizations.

3. Choose a delivered index pattern: `psft_es_index_metrics` or `psft_es_system_metrics`.
4. In the Data tab, specify the Y-axis and the X-axis.

The attributes that are indexed by PeopleSoft are displayed as aggregations in the drop-down list.

5. Select the Metrics & Axes tab, and select values as required.
6. Select the Panel Settings tab, and specify the display settings of the visualization.
7. After ensuring that you've selected or entered the appropriate values, select the Apply changes button, which is next to the Panel Settings tab.

The right pane displays the new visualization as a chart or in a tabular format depending upon the type that you selected.

8. From the top-right corner, select Save.

Enter a name for the new visualization, and then select Save.

9. Select Edit, and then select Add.
10. The Add Panels page displays a list of visualizations, which includes your newly created visualization.

Select the newly created visualization to add to your dashboard.

11. Use the Add Panels page to remove existing visualizations from your dashboard.

On the visualization panel that you want to remove, select the gear icon, and then select Delete from dashboard.

12. From the top-right corner, select Save.

In this manner, you can create more visualizations to add to your dashboard.

If you need to monitor attributes that are not covered by the delivered index patterns and visualizations, it is advisable that you create index patterns that suit your requirements and build visualizations on it. To know more about creating index patterns and creating visualizations, refer to the OpenSearch Dashboards documentation [3.2.0], which is available on www.opensearch.org.

Working with Insights Dashboards for PeopleSoft Application Data

Understanding Application Data and Insights Dashboards

Search Framework enables you to use applications-delivered dashboards and create visualizations in OpenSearch Dashboards based on PeopleSoft application data indexes. In order to be able to create visualizations and use them, you need to ensure that the following pieces are in place:

- PeopleTools 8.63.01 is installed.
- OpenSearch 3.2.0 is installed and running.
The application search definitions are deployed and indexes are built.
- OpenSearch Dashboards 3.2.0 is installed and running.
On the Search Instance Properties page, enter the OpenSearch Dashboards server details.

This topic describes the following:

1. Access Insights (OpenSearch Dashboards) from PeopleSoft.
2. Manage an applications-delivered dashboard.
3. Create a visualization.
4. Use a dashboard.
5. Copy dashboards using ADS definitions.

Delivered Insights Dashboards

This table lists PeopleTools-delivered Insights dashboards:

Insights Dashboard	Link to Product Documentation
PeopleSoft Health Center	See Performance Monitor: Viewing the Health Center Summary Dashboard

Accessing PeopleSoft Insights

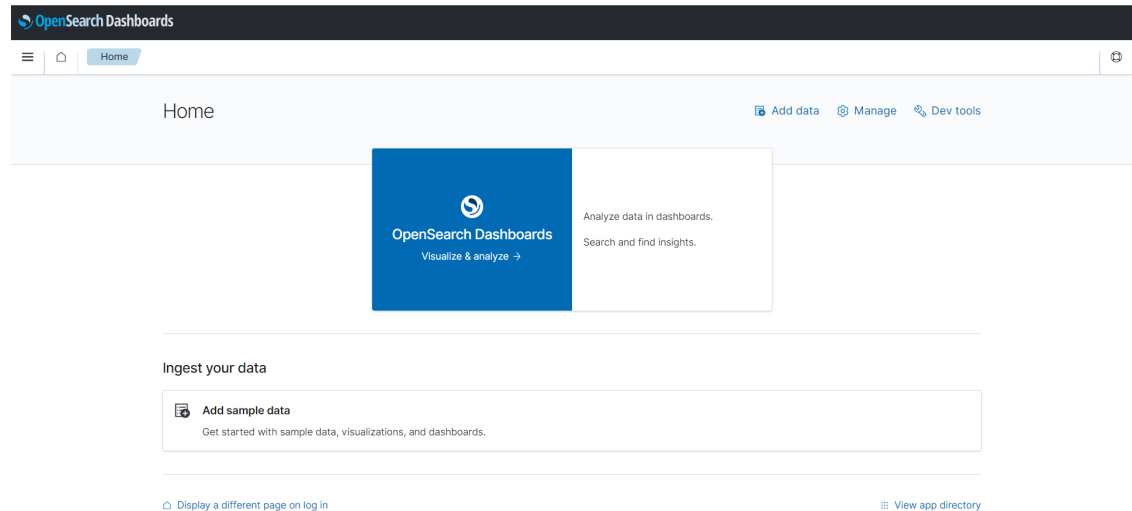
PeopleSoft provides administrators and business analysts direct access to the Insights home page from PeopleSoft (PIA) using the Insights menu under Reporting Tools. Access to the Insights menu is controlled through the Insights Administrator role.

Note

Only those users with the Insights Administrator role can view the Insights menu under Reporting Tools and access the Insights home page.

Access the Insights home page by selecting **Reporting Tools**, and then **Insights**.

This example illustrates the Insights (OpenSearch Dashboards) home page.



For information on performing administrative tasks in OpenSearch Dashboards, refer to the OpenSearch Dashboards documentation [3.2.0], which is available on www.opensearch.org.

User Authentication and Data Authorization

Search Framework delivers a custom plug-in that performs user authentication and data authorization using callback logic at runtime.

OpenSearch Dashboards displays the application search definitions deployed to OpenSearch, which enables application developers to create index patterns and create visualizations and dashboards.

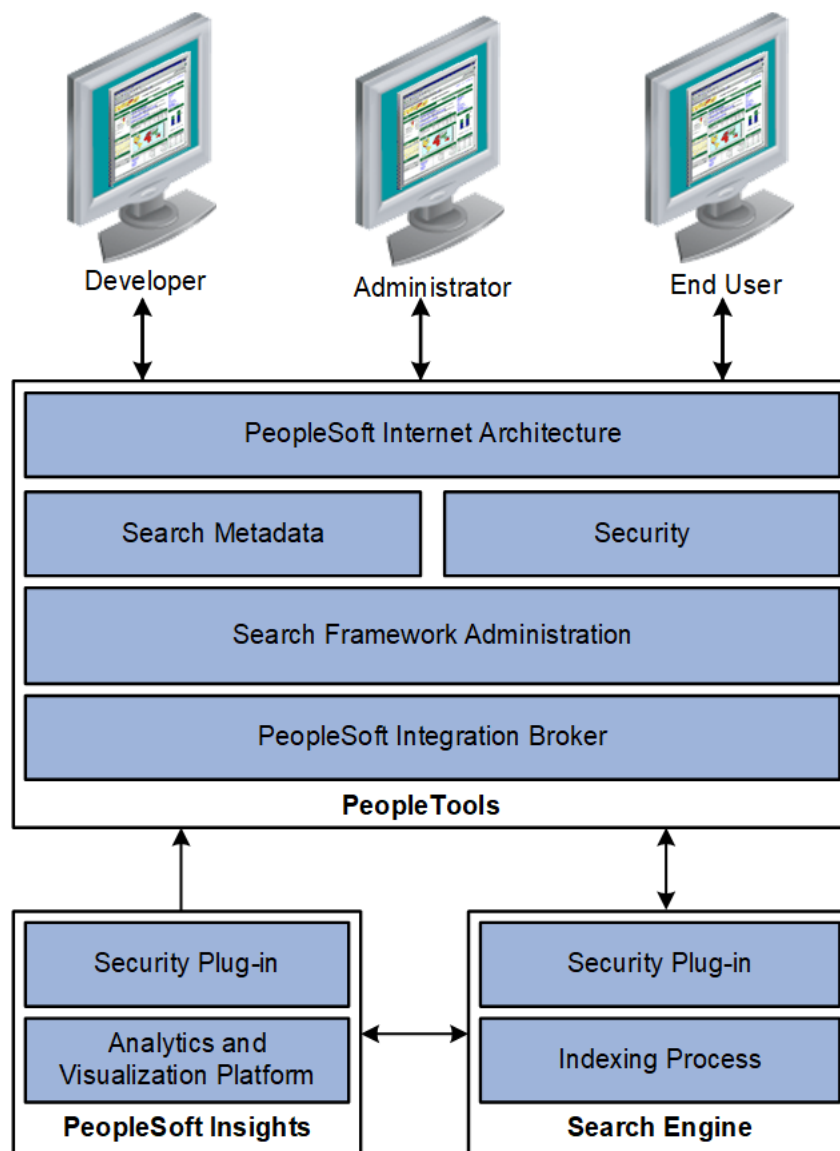
When visualizations and dashboards are created, PeopleSoft applies data authorization based on document-level security set up for the search definition. This ensures that a user has the same set of data access when they use global search and when they use the dashboards.

When a user accesses the dashboards using the tile on their homepage or by using the related information, data shown is restricted by the document-level security applied on the dashboard.

User Authentication and Data Authorization Process Flow

The following illustration describes the process flow involved in user authentication by OpenSearch Dashboards and data authorization when a user opens a dashboard.

This illustration describes the elements of PeopleTools, search engine, and PeopleSoft Insights involved in user authentication and data authorization.



When a user logs on to OpenSearch Dashboards, a request is triggered to the PeopleSoft database for authenticating the user using the `orcl_es_auth` index in OpenSearch.

When a user opens a dashboard, OpenSearch Dashboards obtains data authorization for the user and then displays the visualization data based on the security attributes for that user.

Related Topics

- [Creating a Visualization for Application Data](#)

Search Framework enables you to create visualizations based on application data, which is indexed in OpenSearch. You create a visualization and dashboard in OpenSearch Dashboards.

Managing a Delivered Dashboard

PeopleSoft applications deliver dashboards with associated visualizations through PUM images. The delivered dashboards are available in the PeopleSoft database. The delivered dashboards should be deployed to the OpenSearch Dashboards server.

 Note

Oracle recommends that you do not modify or edit a delivered dashboard or visualization. You may copy a delivered visualization and then modify it as per your business requirements.

Deploying a Dashboard

In order to use the delivered dashboards, a user with the Search Administrator role should deploy the dashboard. When you deploy a dashboard, you are copying the dashboard from the PeopleSoft database to your instance of OpenSearch Dashboards. The deployed dashboard is then available on the Saved Objects page in the Management section (on the Insights (OpenSearch Dashboards) home page).

 Note

Before you deploy a dashboard, you must ensure that the prerequisites of installing and setting up PeopleTools, OpenSearch, and OpenSearch Dashboards are completed. Also you must ensure that the required search definitions are deployed and indexed successfully because a visualization in OpenSearch Dashboards is based on the indexes in OpenSearch.

Use the Deploy Insights Dashboards page to deploy or update a dashboard.

Access the Deploy Insights Dashboards page by selecting **PeopleTools**, and then **Search Framework**, and then **Administration**, and then **Deploy Insights Dashboards**.

This example illustrates the fields and controls on the Deploy Insights Dashboards. You can find definitions for the fields and controls later on this page.

Deploy Insights Dashboards		
86 rows		
☐ Dashboard Name ↑↓	Deploy Status ↑↓	Replace Dashboard ↑↓
☐ Global Payroll Insight Home	Deployed	☐
☐ Absence Event Insight Tile	Deployed	☐
☐ Global Payroll Insights	Deployed	☐
☐ Application - External vs Internal	Deployed	☐
☐ U.S. Payroll Cost Tile	Undeployed	☐
☐ Canada Payroll Cost Tile	Undeployed	☐
☐ Reported Time Insight Tile	Undeployed	☐
Deploy	Reset Status	

Field or Control	Description
Dashboard Name	The delivered dashboards are listed on the Deploy Insights Dashboards page.

Field or Control	Description
Deploy Status	Displays the status of the dashboard, that is, as deployed or undeployed.
Replace Dashboard	If you modify a dashboard after it has been imported to PeopleSoft, use the Replace Dashboard button to overwrite the dashboard that already exists in OpenSearch Dashboards server. When you enable this button, it copies the dashboard to the OpenSearch server and replaces the new dashboard in the target environment. By default, it is disabled. When you select a single dashboard and the Replace Dashboard button is not enabled, a popup appears with the option to replace the dashboard. When you replace multiple dashboards in the OpenSearch Dashboards server, select the Replace Dashboard button for each dashboard that you want to overwrite before you select the Deploy button.
Deploy	Deploys the dashboard to your instance of OpenSearch Dashboards. You use the deploy option in these scenarios: • When PeopleSoft applications deliver a dashboard in a PUM image. • When you migrate dashboards from one environment to another, for example, from a testing environment to the production environment.
Reset Status	Reset Status button resets the dashboard status from Deployed to Undeployed. The default dashboard status is Undeployed. The dashboard remains in OpenSearch Dashboards after a reset.

Assigning Roles for a Dashboard

PeopleSoft applications assign certain roles to the delivered dashboards that enable users to view and use the dashboards and visualizations. You may want to check whether the roles assigned to a dashboard are sufficient for your business requirements, and change the assigned roles, if required. To change the assigned roles, you should access the Insights Privileges page by selecting **PeopleTools**, and then **Search Framework**, and then **Administration**, and then **Assign Dashboard Roles**.

Additionally, you should ensure that the roles assigned to a dashboard are also assigned to users who need to use that dashboard.

See [Specifying User Privileges](#) for more information on assigning roles to a dashboard.

After you deploy a dashboard and assign the required roles to a dashboard, your users can begin using the dashboards and its visualizations. For information on how to use dashboards, see [Using a Dashboard](#).

Masking of Data in OpenSearch Dashboards

PeopleSoft provides the ability to mask personally identifiable information (PII) or sensitive data for a restricted user in OpenSearch Dashboards.

To mask PII or sensitive data, see the product documentation for *PeopleSoft Enterprise Components*, "Data Privacy Framework," Enabling Query Data Masking.

Note the following when you mask sensitive data for restricted users in OpenSearch Dashboards:

- When an administrator creates a saved search from the Discover tab and it includes a sensitive field, then for the restricted user, the field is available but its values are not displayed.
- For restricted users, visualizations do not appear if PII or sensitive information is present. The PII or sensitive information is masked in the data table visualization.
- For restricted users, if a data table visualization contains PII or sensitive data, then the data table will show **No result found**.
- For restricted users, fields with PII or sensitive data are hidden in saved search.
- PII or sensitive information does not appear in filter criteria and KQL Search.
- PeopleSoft Insights does not support partial masking. Any partially masked data is considered as fully masked and removed from aggregations.

Creating a Visualization for Application Data

Search Framework enables you to create visualizations based on application data, which is indexed in OpenSearch. You create a visualization and dashboard in OpenSearch Dashboards.

This section discusses the steps that should be completed before you can use the newly created dashboards and its visualizations:

- Import a newly created dashboard.
- Configure a dashboard as a tile or related information.
- Specify user privileges for a dashboard.

After completing these steps, the dashboard is ready for use by an end user. For instructions on using a dashboard, see [Using a Dashboard](#).

Creating a Visualization

Creating a visualization from scratch involves creating an index pattern. In the PeopleSoft implementation of OpenSearch Dashboards, an index pattern is associated with a search definition, so a visualization is based on a search definition. The index pattern identifies the mapping of the indexed fields. You could also use an index pattern that has already been created if you need to create a visualization based on the same search definition.

A user with the Search Administrator role or a user with create privilege specified on the Insights Privileges page can create a visualization.

See [Specifying User Privileges](#).

Before you can create a visualization, you need to create an index pattern.

To create a new visualization, complete the following steps:

1. On the Insights home page, select the Management icon.

The Management page displays existing index patterns, if any.

Note

You must specify one of the index patterns as the default index pattern. If you do not set a default search pattern, users may see error messages when they attempt to view any of the dashboards.

2. Select Create index pattern.

The Create index pattern page displays the application data indexes that are indexed in OpenSearch. The indexes are suffixed with a database name.

3. For Step 1: Define index pattern, enter an indexed search definition and suffix it with a wild card character (*) to generalize the index pattern and to avoid dependency on the database. If the search definition name that you entered matches the indexed search definition, a success message is displayed.

For example, `ep_ap_payments*`

When you enter a name, take into consideration the characters that can be used.

If you prefer to create a new index pattern, based on a delivered index pattern, you can name it with an additional underscore (-) before the wildcard (*), for example, `ep_ap_payments_*`. Thus, you can avoid overwriting your customized index pattern when PeopleSoft delivers an update on the index pattern.

4. Select Next Step.

5. For Step 2: Configure settings, enter a time filter field name or you can select I don't want to use the Time Filter.

If you select a time filter field name, OpenSearch Dashboards will use the field to filter the data by time.

Use the Show advanced options link to specify a custom name for the index pattern instead of the system-generated name.

6. Select Create index pattern.

On creating an index pattern, OpenSearch Dashboards displays the mapping of all the fields in the index pattern.

In the PeopleSoft implementation of OpenSearch Dashboards, you should use the field alias for aggregation to return the original text based on the required case-sensitive text.

Note

If you are using PeopleTools 8.59.02 or earlier, you may be using technical field names instead of the field name alias, which is the default in PeopleTools 8.59.03 and later versions. For instructions on remediating the issue, see Using Field Aliases in Kibana Visualizations in PeopleTools (Doc ID 2787722.1).

If additional languages are enabled in the index, the field names display the corresponding field alias.

7. After creating the index pattern, select the Discover icon to view the indexed documents of the index pattern.

Select a date range to filter the documents.

Note

The Discover page uses the technical names for fields rather than the alias names displayed on the index pattern.

8. Next, select the Visualize icon. The page lists existing visualizations, if any.
 - a. Select the plus sign to create a new visualization.
 - b. On the New Visualization page, you can see visualization types, such as, tabular form, pie chart, bar chart, gantt chart, region map, and so on. For instructions on creating a region map, see [Creating Custom Vector Maps \(Region Maps\) Visualization](#).

Select a visualization type.

Hover over each type to read a description of the visualization type.

- c. On the New Pie/Choose a source page, select the index pattern that you created.
 - d. Specify metrics for the visualization.

The options differ based on the visualization type.
 - e. Specify bucket aggregations as required.
 - f. Select Save, and then enter a name for the new visualization.

9. Select the Dashboard icon, and then select Create a new dashboard.

You may add the visualization to an existing dashboard.

You can add one or more visualizations to a dashboard.

- a. On the Editing New Dashboard page, select Add to choose a visualization.
 - b. From the Add Panels page, select the required visualization.
 - c. Select Save, and enter a name for the new dashboard.

Note

The dashboard name should be unique.

You may add a description for the dashboard.

The new dashboard is listed on the Dashboard page.

For details on creating visualizations and using the various features of OpenSearch Dashboards, refer to the OpenSearch Dashboards documentation [3.2.0] on www.opensearch.org.

Creating Custom Vector Maps (Region Maps) Visualization

Region maps can be created using default vector maps or custom vector maps. The default vector maps cover the majority of the use cases, but if you have any requirements that are not

covered by vector maps, you can use custom vector maps. To create custom vector maps, a GeoJSON file with the required vectors needs to be imported.

For more information on custom GeoJSON, refer to the OpenSearch blog (<https://opensearch.org/blog/whatsnew-custom-geo-json/>).

To import a custom vector map, complete the following steps:

1. Create a JSON file to upload.

Note

The JSON file must have .geojson or .json as an extension.

2. In OpenSearch Dashboards, select Create Visualization to create a region map visualization.

3. In the right panel, select Import Vector Map.

4. Browse and select the .geojson file to import.

5. Enter the file name (lowercase and numbers only).

6. Click the Import file button.

If the file import is successful, the system displays a success message.

7. Click the Refresh button to refresh the page.

At this point, your custom region map is created, and you can use it by following these steps:

8. Navigate to the Layer Options tab, and select Custom vector map.

9. In the Vector map section, select the vector map that you just imported.

Note

The maximum file size that can be imported is 25 MB, and the maximum number of features that can be imported is 10,000.

10. Click the Update button.

Consider the following points when you create region maps:

- The region map visualization uses OpenStreetMap and Natural Earth APIs and data for creating region maps.
- OpenSearch default vector maps do not have some join fields, such as FIPS 5-2 alpha for US states. The default vector map of USA states can be used with the join field "name (en)" instead of state codes. It is recommended that the indexed data includes a field with state name to which the vector can be mapped.
- OpenSearch region maps do not support the vector map for postal codes.

Example of GeoJSON File

The following is an example of GeoJSON file.

```
{  
  "type": "FeatureCollection",
```

```

    "name": "usa counties",
    "features": [
      { "type": "Feature", "properties": { "iso2": "US", "iso3": "SF-CA",
"name": "San Francisco County", "country": "US", "county": "SF" },
"geometry": { "type": "Polygon", "coordinates":[xxxx] } },
      { "type": "Feature", "properties": { "iso2": "US", "iso3": "SC-CA",
"name": "Santa Cruz County", "country": "US", "county": "SC" }, "geometry":
{ "type": "Polygon", "coordinates":[xxxx] } }
    ]
  }

```

Importing a Dashboard

A newly created dashboard and visualization is an object in OpenSearch Dashboards. The dashboard and visualization must be imported in to the PeopleSoft database in order to apply the needed user privileges and to configure it as a tile or related information.

Note

Only a PeopleSoft user with the Search Administrator role can perform the task of importing dashboards. In fact, the Search Administrator role is required to perform all the subsequent tasks.

Note

Insights administration pages use the default search instance. If you configure more than one search instance, the search instance with the lowest number in priority is treated as the default search instance.

Use the Import Insights Dashboards page to import the newly created visualization and dashboard in OpenSearch Dashboards to the PeopleSoft database.

Access the Import Insights Dashboards page by selecting **PeopleTools**, and then **Search Framework**, and then **Administration**, and then **Import Insights Dashboards**.

This example illustrates the fields and controls on the Import Insights Dashboards page. You can find definitions for the fields and controls later on this page.

Select a Dashboard and click on Import. Repeat the steps for all Dashboards. Click on Save.

Dashboards

☐	Name	File Name	Hide Filter Bar	Hide Time Filter	Hide Search Bar	Include In Insights Search	
☐			☐	☐	☐	☒	Replace Tokens + -

Field or Control	Description
Name	Choose a dashboard that you want to import. The dashboards that are created in OpenSearch Dashboards are listed here. The Import Insights Dashboards page also displays the applications-delivered dashboards that you have deployed. For information on applications-delivered dashboards, see Managing a Delivered Dashboard .
File Name	This field is populated when you select the Import button. This is the JSON file that OpenSearch Dashboards exports. Typically, the file name is the name of the dashboard with .json as the extension.
Hide Filter Bar	Enable the Hide Filter Bar button to hide the Global Filter bar from that dashboard. By default, it is disabled.
Hide Time Filter	Enable the Hide Time Filter button to hide the time picker from that dashboard. By default, it is disabled.
Hide Search Bar	Enable the Hide Search Bar button to hide the Search Query bar from that dashboard. By default, it is disabled.
Include In Insights Search	Enable the Include In Insights Search button to include the imported dashboard for indexing in the Insights Search Definition. If included, the dashboard becomes searchable in global search using Insights search group. Note: By default, dashboards with more than one visualization are included for indexing, while dashboards with only one visualization are not. However, you can enable or disable it at any time and save the page. See Working with the Insights Search Group See Working with Suggestions Search
Description	Enables you to add or update the description of the dashboard. By default, the OpenSearch Dashboard's description is displayed. However, the edit icon allows you to add or update the description. Once you edit the description, it's considered customization and will not be updated with the OpenSearch Dashboards description or ADS copy. Note: The description you enter appears in the Insights search suggestions. The description must be appropriate for end-user viewing. Make the description as informative, concise, and intuitive as possible. Note: The description is translatable.

Field or Control	Description
Import	Imports the selected dashboard from OpenSearch Dashboards into the PeopleSoft database. If you modify a dashboard after it has been imported to PeopleSoft, you should re-import the dashboard to PeopleSoft. When you create a dashboard in OpenSearch Dashboards, you must import it into PeopleSoft.
Replace Tokens	Enables you to configure placeholder and replacement values for tokens used in the dashboard JSON. Click the Replace Tokens link to open the Replace JSON Tokens page and define the required values. For more information on configuring placeholders and replacement text, see the Configuring Replace JSON Tokens topic below.
Save	Saves the imported dashboard in the PeopleSoft database.
Add to Project	Enables you to add data set instances on the page to an existing or new ADS project. See Lifecycle Management Guide: Adding Data Set Instances from Object Designer Pages.

Configuring Replace JSON Tokens

The Replace JSON Tokens page is used to configure placeholder and replacement values for tokens defined in the dashboard JSON. These tokens enable you to update environment-specific values, such as links or identifiers, during dashboard deployment without modifying the dashboard content. The system replaces the configured placeholder text with the specified replacement text when you deploy the dashboard.

Use the Replace JSON Tokens page to define the required placeholder and corresponding replacement values.

Access the Replace JSON Tokens page by clicking the **Replace Tokens** link on the Import Insights Dashboards page.

This example illustrates the fields and controls on the Replace JSON Tokens page. You can find definitions for the fields and controls later on this page.

The screenshot shows the 'Replace JSON Tokens' dialog box. At the top, there are 'Cancel', 'Replace JSON Tokens', and 'Done' buttons. Below the title bar, there is a 'Dashboard Name' label. The main area is titled 'Replace Tokens' and displays a table with 1 row. The table has two columns: 'Placeholder text' and '*Replacement text'. The first row contains a checkbox, the number '1', a text input field, another text input field, and '+' and '-' buttons. Above the table, there are icons for adding, searching, and sorting.

Field or Control	Description
Dashboard	Displays the name of the selected dashboard.
Placeholder Text	Enter the placeholder value defined in the dashboard JSON. During deployment, the system searches for this value and replaces it with the corresponding replacement text.
	Note Placeholder text is case-sensitive and must be unique. Ensure that the placeholder text does not conflict with or replicate any existing JSON structure or token identifiers in the dashboard.
Replacement Text	Enter the value that replaces the placeholder text during dashboard deployment. This value is typically environment-specific and ensures that the dashboard reflects the correct configuration.

Configuring a Dashboard

After importing the dashboard to the PeopleSoft database, the user with the Search Administrator role can configure the dashboard as a tile or related information in a component to enable end users to use the dashboard directly from PeopleSoft.

Note

In addition to the Search Administrator role, you must also have the Portal Administrator role, which is needed to create content references.

Use the [Configure Insights Dashboards](#) page to configure dashboards as tiles or related information in a component.

Access the **Configure Insights Dashboards** page by selecting **PeopleTools**, and then **Search Framework**, and then **Administration**, and then **Configure Insights Dashboards**.

Configuring a Dashboard as a Tile

Search Framework provides the Configure Insights Dashboards page to enable you to create a content reference for a tile. In order to use this dashboard, end users should add the tile to their PeopleSoft home page using the personalizations option.

For more information, see [Using a Dashboard](#).

This example illustrates the fields and controls on the Configure Insights Dashboards - Tile tab. You can find definitions for the fields and controls later on this page.

Tile

Component Level

Page Level

Insights

Filter

Search

Clear

Visualizations

Content Reference %

Label %

Full View %

Full View App Class %

Select

Title View %

Title View App Class %

Select

Height %

Width %

1 row

Save

Add to Project

Field or Control	Description
Content Reference	Enter a unique name for the content reference of the tile. For example, JOB_POSTINGS_TILE. This name is not displayed to the end user. Before you enter a name for a content reference, refer to Portal Technology: Defining Content References. The content reference is stored in the PeopleSoft Applications folder at this location: PeopleTools, and then Portal, and then Structure and Content, and then Fluid Structure Content, and then Fluid Pages, and then PeopleSoft Applications.
Label	Enter a label for the tile. For example, Job Postings. The label appears as the tile header.
Full View	Choose an imported dashboard from the list. You may configure a dashboard with multiple visualizations for full view. This is a mandatory field. When a dashboard displays in full view in PeopleSoft, the Open in OpenSearch Dashboards link displays if the edit privilege for the dashboard is assigned to you on the Insights Privileges page. The Open in OpenSearch Dashboards link enables you to open the dashboard in OpenSearch Dashboards and edit the dashboard. A user with the view privilege can open the dashboard in PeopleSoft where you have options to filter the data or use the time picker to view data based on a time range. See Specifying User Privileges for more information.
Full View App Class	Choose an application class that contains PeopleCode to apply filters based on context and display visualization data accordingly. For more information, see Specifying an Application Class section later in this topic. If you do not specify an application class to filter data, OpenSearch Dashboards displays the default visualization data.

Field or Control	Description
Select	Select to launch the Full View page to choose an application class. For more information, see Specifying an Application Class section later in this topic.
Tile View	Choose an imported dashboard from the list. When you configure a dashboard as tile view, the configured dashboard displays on the loading of the tile. This is a mandatory field. Note: Oracle recommends that you configure a dashboard that has a single visualization for tile view.
Tile View App Class	Choose an application class that contains PeopleCode to apply filters based on context and display visualization data accordingly. For more information, see Specifying an Application Class section later in this topic. If you do not specify an application class to filter data, OpenSearch Dashboards displays the default visualization data.
Select	Select to launch the Tile View page to choose an application class. For more information, see Specifying an Application Class section later in this topic.
Height	Specify the height of the tile. For more information on tile sizes, see Portal Technology: Step 4: Tile Layout Properties.
Width	Specify the width of the tile.
Add to Project	Enables you to add data set instances on the page to an existing or new ADS project. See Lifecycle Management Guide: Adding Data Set Instances from Object Designer Pages.

Configuring a Dashboard as Related Information of a Component

Configuring a dashboard as related information of a component makes the dashboard appear in the right panel of the component. However, access to the component and dashboard data is controlled by the security privileges assigned to a user.

On the Configure Insights Dashboards page, select the Component Level tab to configure a dashboard as related information of a component.

This example illustrates the fields and controls on the Configure Insights Dashboards page - Component Level tab. You can find definitions for the fields and controls later on this page.

The screenshot shows the 'Component Level' tab selected in the 'Configure Insights Dashboards' page. At the top, there is a 'Filter' input field with 'Search' and 'Clear' buttons. Below this is a table titled 'Visualizations' with 8 columns: 'Component Name', 'Content Reference', 'Full View', 'Full View App Class', 'Select', 'Tile View', 'Tile View App Class', and 'Select'. The table contains one row with input fields for each column. Below the table are 'Save' and 'Add to Project' buttons. The status '1 row' is shown at the top right of the table.

Field or Control	Description
Component Name	Choose the fluid component to which you want to configure a dashboard as related information.
Content Reference	Choose the content reference name associated with the selected component.
Full View	Choose an imported dashboard from the list. You may configure a dashboard with multiple visualizations for full view. This is a mandatory field. When a dashboard displays in full view in PeopleSoft, the Open in OpenSearch Dashboards link displays if the edit privilege for the dashboard is assigned to you on the Insights Privileges page. The Open in OpenSearch Dashboards link enables you to open the dashboard in OpenSearch Dashboards and edit the dashboard. A user with the view privilege can open the dashboard in PeopleSoft where you have options to filter the data or use the time picker to view data based on a time range. See Specifying User Privileges for more information.
Full View App Class	Displays the selected application class, which contains PeopleCode to apply filters based on context and display visualization data accordingly. If you do not specify an application class to filter data, OpenSearch Dashboards displays the default visualization data.
Select	Select to launch the Full View page to choose an application class. For more information, see Specifying an Application Class section later in this topic.
Tile View	Choose an imported dashboard from the list. When you configure a dashboard as tile view, the related information tile displays the dashboard on loading of the component. Note: Oracle recommends that you configure a dashboard that has a single visualization for tile view.
Tile View App Class	Displays the selected application class, which contains PeopleCode to apply filters based on context and display visualization data accordingly. If you do not specify an application class to filter data, OpenSearch Dashboards displays the default visualization data.
Select	Select to launch the Tile View page to choose an application class. For more information, see Specifying an Application Class section later in this topic.

Field or Control	Description
Content	Enables you to preview the dashboard in the component.
Add to Project	Enables you to add data set instances on the page to an existing or new ADS project. See Lifecycle Management Guide: Adding Data Set Instances from Object Designer Pages.

Specifying an Application Class

PeopleSoft provides you the flexibility to filter the data in a visualization based on a context by using an application class (PTSF_INSIGHTS) that contains PeopleCode to apply filters.

For more information on using the application classes, see PeopleCode API Reference: FilterValues Class and PeopleCode API Reference: DashboardFilters Class.

Access the Full View or Tile View page by selecting the search icon on the row.

This example illustrates the fields and controls on the Full View page. You can find definitions for the fields and controls later on this page.

The screenshot shows a dialog box titled "Full View". At the top left is a "Cancel" button and at the top right is a "Done" button. Below the title bar, there are three search fields, each with a magnifying glass icon on the right:

- Package**: A text input field.
- Path**: A text input field.
- Class Name**: A text input field.

Field or Control	Description
Package	Specifies the root package where the application class is created.
Path	Species the path, represented by a colon (:).
Class Name	Choose the relevant application class. You must ensure that you choose the correct application class; if not an error message is displayed.

Embedding a Dashboard in Applications Page

On the Configure Insights Dashboards page, select the Page Level tab to embed a dashboard in applications page.

Before you embed a dashboard, you must ensure that the prerequisite for embedding a dashboard in applications page is completed. You need to complete the following steps:

- 1. Open the applications page in Application Designer.
- 2. Insert an Embedded Related Content group box.
See Fluid User Interface Developer's Guide: Setting Group Box Properties and Fluid User Interface Developer's Guide: Working with Embedded Related Content.
- 3. In the Fluid tab of the Group Box Properties page, select Related Content as Group Box Type.

This example illustrates the fields and controls on the Configure Insights Dashboards - Page Level tab. You can find definitions for the fields and controls later on this page.

Configure Insights Dashboards

Tile

Component Level

Page Level

Insights

Filter:

Search

Clear

Visualizations

☐ Page Name T1	Component Name T1	Content Reference T1	Page Field Name T1	Page View T1	Full View T1	App Class T1	Select	Interactive T1	Set Filters
☐		0					☐	☐	Set Filters Test Content + -

Save

Add to Project

Field or Control	Description
Page Name	Choose the applications page where you want to embed a dashboard.
Component Name	Choose the component name associated with the selected page.
Content Reference	Choose the content reference name associated with the selected component.
Page Field Name	Choose the page field name associated with the ERC group box.
Page View	Choose an imported dashboard from the list. When you embed a dashboard as a page view, the dashboard is displayed on loading of the applications page. The page view shows only one visualization as a tile view. Therefore, it is not recommend using dashboards with multiple visualizations in the page view. We can control the size and style of the embedded area within the page by applying regular fluid styles to group boxes.

Field or Control	Description
Full View	Choose an imported dashboard from the list. You may embed a dashboard with multiple visualizations for full view. This is a mandatory field. When a dashboard displays in full view in PeopleSoft, the Open in OpenSearch Dashboards link displays if the edit privilege for the dashboard is assigned to you on the Insights Privileges page. The Open in OpenSearch Dashboards link enables you to open the dashboard in OpenSearch Dashboards and edit the dashboard. A user with the view privilege can open the dashboard in PeopleSoft where you have options to filter the data or use the time picker to view data based on a time range. See Specifying User Privileges for more information.
App Class	Displays the selected application class, which contains PeopleCode to apply filters based on context and display visualization data accordingly. If you do not specify an application class to filter data, OpenSearch Dashboards displays the default visualization data.
Select	Select to launch the Tile View page to choose an application class. For more information, see Specifying an Application Class section above in this topic.
Interactive	Enable the Interactive button to embed a dashboard in the applications page as interactive. For more information, see Embedding an Interactive Dashboard in Applications Page section later in this topic.
Set Filters	Select to launch the Set Filters page to apply additional filters apart from the time range. For more information, see Specifying Set Filters section later in this topic.
Test Content	Enables you to preview the dashboard in the applications page.
Add to Project	Enables you to add data set instances on the page to an existing or new ADS project. See Lifecycle Management Guide: Adding Data Set Instances from Object Designer Pages.

Specifying Set Filters

You can use the Set Filters page to pass contextual data from the component buffer as a filter to the visualization, apart from the time range. Page field values can be used as filters. On the dashboard that is rendered, the applied filters are shown.

Note

Set Filters can be configured for a maximum of five page field values.

Access the Set Filters page by selecting the Set Filters button on the row.

This example illustrates the fields and controls on the Set Filters page. You can find definitions for the fields and controls later on this page.

Cancel

Set Filters

Done

	Page Field Name	Label Text	*Search Definition	Search Attribute		
1					Q	Q
					+	-

Field or Control	Description
Page Field Name	Choose the page field (in the applications page) which you want to apply as filter in the dashboard.
Label Text	Displays the labels of the Page Field Name .
Search Definition	Choose the search definition to which you want to apply the filter.
Search Attribute	Choose the search attribute to which you want to apply the filter.

For more information on using a dashboard that is embedded in applications page, see [Using a Dashboard that is Embedded in Applications Page](#).

Embedding an Interactive Dashboard in Applications Page

On the Configure Insights Dashboards page, select the Page Level tab to enable you to embed one or more PeopleSoft Insights and make them interactive on the applications page. To embed an interactive dashboard, you must enable the **Interactive** button.

Before you embed an interactive dashboard, you must ensure that the prerequisite for embedding an interactive dashboard in applications page is completed. You need to complete the following prerequisite in Application Designer:

1. Insert an Embedded Related Content group box and select Related Content as Group Box Type on the Group Box Properties page.
See Fluid User Interface Developer's Guide: Setting Group Box Properties and Fluid User Interface Developer's Guide: Working with Embedded Related Content.
2. Insert a hidden long edit box on the applications page. In the interactive process, this field acts as a control field.
3. Custom application logic is needed as FieldChange PeopleCode of a long edit box to process the filter applied.

This example illustrates the fields and controls on the Configure Insights Dashboards - Page Level tab. You can find definitions for the fields and controls later on this page.

Field or Control	Description
Page Name	Choose the applications page where you want to embed a dashboard.
Component Name	Choose the component name associated with the selected page.
Content Reference	Choose the content reference name associated with the selected component.
Page Field Name	Choose the page field name associated with the ERC group box.
Page View	Choose an imported dashboard from the list. When you embed a dashboard as a page view, the dashboard is displayed on loading of the applications page. In the interactive dashboards page view, you can use dashboards with multiple visualizations. You must style the embedded area based on the page sizing required for your use case, using fluid styles applied to group boxes.
Full View	Choose an imported dashboard from the list. You may embed a dashboard with multiple visualizations for full view. This is a mandatory field. When a dashboard displays in full view in PeopleSoft, the Open in OpenSearch Dashboards link displays if the edit privilege for the dashboard is assigned to you on the Insights Privileges page. The Open in OpenSearch Dashboards link enables you to open the dashboard in OpenSearch Dashboards and edit the dashboard. A user with the view privilege can open the dashboard in PeopleSoft where you have options to filter the data or use the time picker to view data based on a time range. See Specifying User Privileges for more information.
App Class	Displays the selected application class, which contains PeopleCode to apply filters based on context and display visualization data accordingly. If you do not specify an application class to filter data, OpenSearch Dashboards displays the default visualization data.

Field or Control	Description
Select	Select to launch the Tile View page to choose an application class. For more information, see Specifying an Application Class section above in this topic.
Interactive	Enable the Interactive button to embed a dashboard in the applications page as interactive.
Set Control	Select to launch the Interactive Insights Configuration page to apply the configuration required for the interactive dashboard. For more information, see Configuring Interactive Insights section later in this topic.
Test Content	Enables you to preview the dashboard in the applications page.
Add to Project	Enables you to add data set instances on the page to an existing or new ADS project. See Lifecycle Management Guide: Adding Data Set Instances from Object Designer Pages.

Configuring Interactive Insights

PeopleSoft provides you the flexibility to set up the details required to make a dashboard interactive.

Access the Interactive Insights Configuration page by selecting the Set Control button on the row.

This example illustrates the fields and controls on the Interactive Insights Configuration page. You can find definitions for the fields and controls later on this page.

Cancel
Interactive Insights Configuration
Done

Control Field

Search Definitions

Search Definition			
1		+	−

Field or Control	Description
Control Field	Choose the field (in the applications page) that has a hidden long edit box at level 0. This field contains the custom PeopleCode that performs the necessary interactive changes on the page when a filter is applied to the page view dashboard.
Search Definition	Choose the search definition to which you want to apply the filter. When you provide the search definition, the system maps the right search attributes for the filter.

For more information on using an interactive dashboard that is embedded in applications page, see [Using an Interactive Dashboard that is Embedded in Applications Page](#).

Embedding a Dashboard in Fluid WorkCenter

On the Configure Insights Dashboards page, select the Insights tab to embed a dashboard in fluid WorkCenter pages.

This example illustrates the fields and controls on the Configure Insights Dashboards - Insights tab. You can find definitions for the fields and controls later on this page.

Field or Control	Description
Portal Object Name	Enter the portal object name.
Portal Label	Enter the label for portal.
Dashboard Name	Choose an imported dashboard from the list.
App Class	Displays the selected application class, which contains PeopleCode to apply filters based on context and display visualization data accordingly. If you do not specify an application class to filter data, OpenSearch Dashboards displays the default visualization data.
Select App Class	Select to launch the Full View page to choose an application class. For more information, see Specifying an Application Class section.

Field or Control	Description
Add to Project	Enables you to add data set instances on the page to an existing or new ADS project. See Lifecycle Management Guide: Adding Data Set Instances from Object Designer Pages.

For more information on using a dashboard that is embedded in fluid WorkCenter, see [Using a Dashboard that is Embedded in Fluid WorkCenter](#).

Related Topics

- PeopleCode API Reference: FilterValues Class Methods
- PeopleCode API Reference: DashboardFilters Class Methods

Specifying User Privileges

OpenSearch Dashboards does not provide role level access to the dashboards and visualizations, so PeopleSoft provides the required security by mapping the dashboards to PeopleSoft roles.

Note

The Search Administrator role is considered as the super user in OpenSearch Dashboards. Thus, a user with the Search Administrator role has access to all the dashboards and visualizations. However, the Search Administrator role does not have access to the data in OpenSearch Dashboards. *Access to the data is controlled by the application-specific roles.* If a user does not have access to the data, the visualization displays the message: No results found.

Use the Insights Privileges page to specify user privileges for the dashboards and to create visualizations.

Access the Insights Privileges page by selecting **PeopleTools**, and then **Search Framework**, and then **Administration**, and then **Assign Dashboard Roles**.

This example illustrates the fields and controls on the Insights Privileges page. You can find definitions for the fields and controls later on this page.

The screenshot displays two sections of the Insights Privileges page. The top section, titled "Dashboard Access", contains a table with three columns: "Dashboard Name", "Role Name", and "Privilege". Each column has a search icon and a dropdown arrow. Below the table are "Add to Project" and "Add" buttons. The bottom section, titled "Create Access", contains a table with one column: "Role Name". It also has a search icon and a dropdown arrow. Below this table are "Save" and "Add to Project" buttons.

Dashboard Access Grid

Field or Control	Description
Dashboard Name	The drop-down list displays the imported dashboards. Choose a dashboard.
Role Name	Choose an application specific role that you want to map to the selected dashboard. The application-specific role enables a user to access and view data in OpenSearch Dashboards.
Privilege	Valid values are: • Edit - A user with the edit privilege can edit a dashboard or visualization in OpenSearch Dashboards and save the changes. On PIA, when a dashboard is displayed, the Open in OpenSearch Dashboards link appears for a user with the edit privilege. The Open in OpenSearch Dashboards link enables you to open the dashboard in OpenSearch Dashboards and edit the dashboard. • View - A user with the view privilege can open a dashboard or visualization in PeopleSoft and view it. The user can use the filter options and time picker options. With this security layer, only users with the specified role can view or edit a dashboard. Furthermore, if you want to personalize a tile (dashboard) on your home page, the tile will be listed only if you have the privilege, that is, you have the role specified on the Insights Privileges page. Therefore, administrators must take into account the users to whom the dashboards should be available.

Create Access Grid

Field or Control	Description
Role Name	For a user to create a new dashboard, the user should have at least one of the access roles mapped in the create access list. A user who is the creator of the dashboard possesses the edit privilege irrespective of the role mapped in the dashboard create access grid. A user with the Search Administrator role can access all the dashboards.
Add to Project	Enables you to add data set instances on the page to an existing or new ADS project. See Lifecycle Management Guide: Adding Data Set Instances from Object Designer Pages.

A dashboard can be mapped to multiple roles with different privileges for a user.

Using a Dashboard

As an end user, you can use the dashboards depending on your user privileges. The dashboards are made available to you in following ways:

- As a tile, which can be added to a home page.
- As related information of a component.
- As an embedded dashboard in applications page.
- As an embedded interactive dashboard in applications page.
- As an embedded dashboard in fluid WorkCenter.

Using a Dashboard that is Configured as a Tile

The dashboards that are configured as a tile are listed when you select the Add Tile button on the Personalize Homepage page. Every user who wants to view the visualizations should use the Personalize Homepage page to add the dashboard to their home page.

To use a dashboard that is configured as a tile, complete the following steps:

1. On the PeopleSoft applications environment, select a home page that you want to add a dashboard.
2. From the Actions menu, select Personalize Homepage.
3. In personalization mode, select Add Tile.
4. Find the desired tile in the Add Tile dialog box.

Note

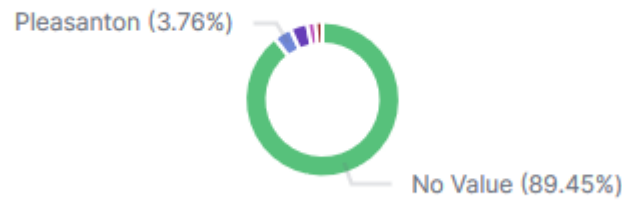
Due to the privileges specified on the Insights Privileges page, the tiles are displayed only if you have the specified roles.

5. Select the desired tile.
6. Select Save on Personalize Homepage.
7. On the home page, select the tile to view the visualizations.

Typically, the dashboard opens in a larger window and displays all the visualizations associated with the dashboard. When the dashboard displays in full view, you can filter the data or use the time picker to view data based on a time range. If the edit privilege is assigned to you, then the Open in OpenSearch Dashboards link displays, which enables you to open the dashboard in OpenSearch Dashboards and edit it.

This example illustrates the Applicant dashboard configured as a tile on a homepage.

Applicant



Note

The tile loads all the visualizations associated with the dashboard, so the rendering of the tile may be delayed based on the data volume and network speed.

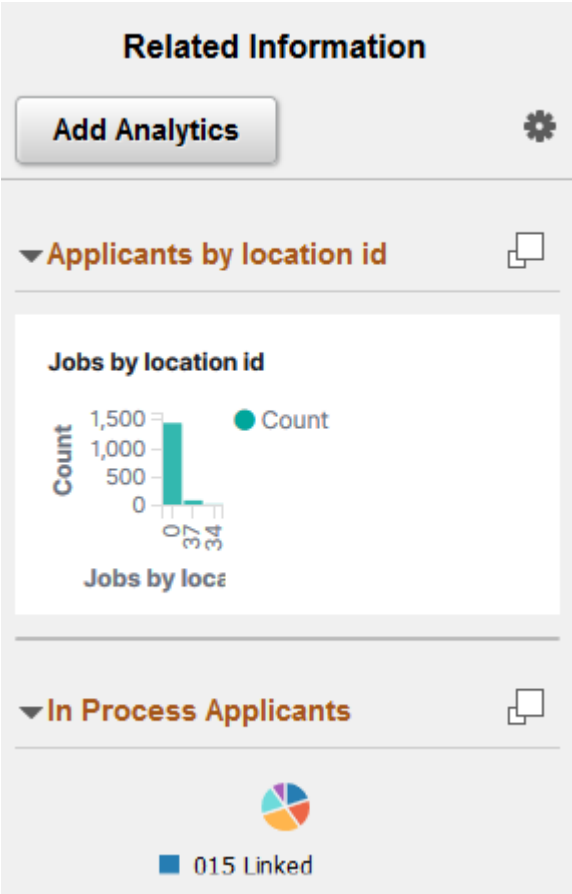
Related Topics

- Applications User's Guide: Working with Fluid Homepages and Dashboards

Using a Dashboard that is Configured as Related Information of a Component

The dashboards that are configured as related information of a component display on the right panel of the component.

This example illustrates a dashboard configured as related information. You can find definitions for the fields and controls later on this page.



Field or Control	Description
	Use the button to display the dashboard in full view. Typically, the dashboard opens in a larger window and displays all the visualizations associated with the dashboard. When the dashboard displays in full view, you can filter the data or use the time picker to view data based on a time range. If the edit privilege is assigned to you, then the Open in OpenSearch Dashboards link displays, which enables you to open the dashboard in OpenSearch Dashboards and edit it.

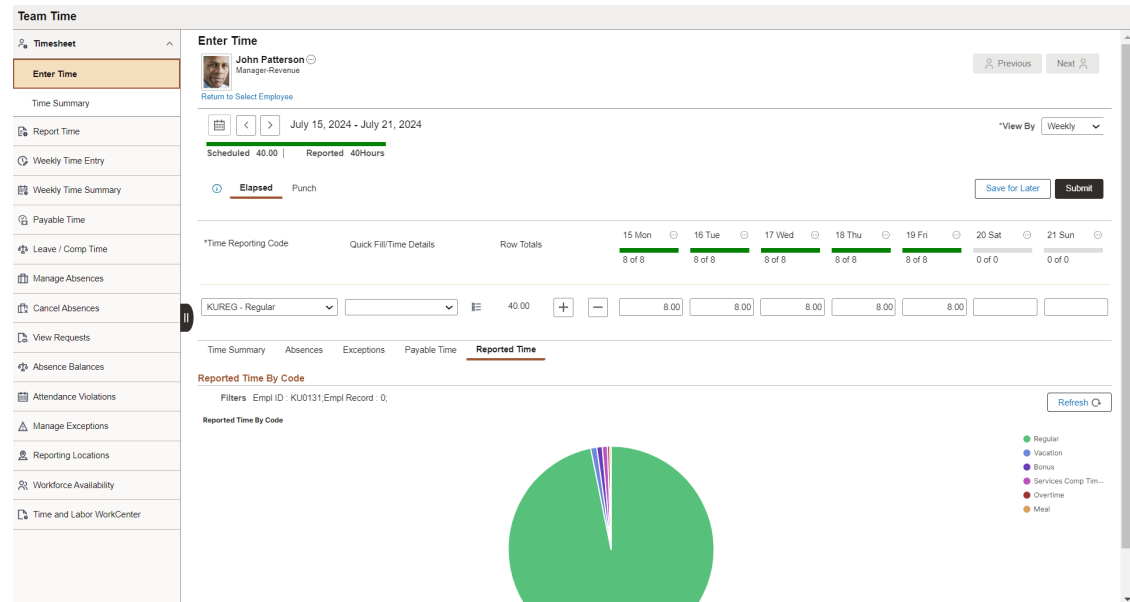
Note

PeopleSoft Insights dashboards are rendered in real-time with data aggregations, which are collected at runtime. This may delay the rendering of the visualizations based on the data volume and network speed.

Using a Dashboard that is Embedded in Applications Page

After you embed the dashboard, you can easily access and view the embedded dashboard in the transaction area of the application page.

This example illustrates the Applications Page after you integrate a dashboard.



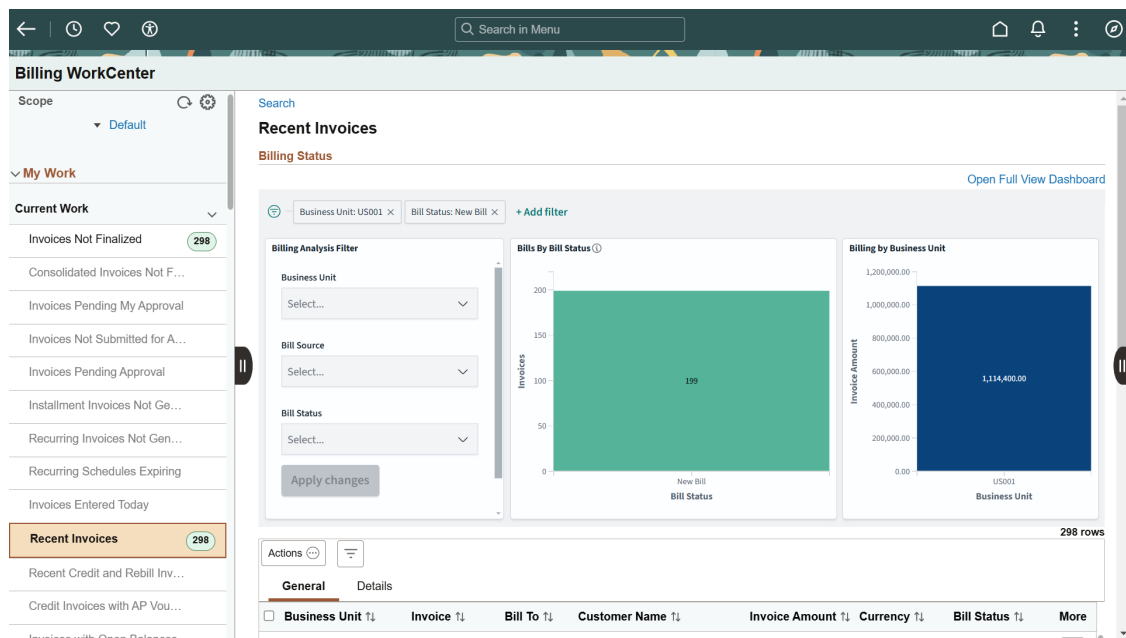
Once you embed the dashboard, you can view the applied filters in your visualization. This allows you to refresh the visualization based on the filter values applied at runtime using the Refresh button. You can also change the dashboard at runtime based on your requirements using the delivered PeopleCode methods. For more information, see PeopleCode API Reference: FilterValues Class Methods.

When you click the tile view visualization, a full view dashboard appears in the new window.

Using an Interactive Dashboard that is Embedded in Applications Page

After you embed an interactive dashboard, you can easily access and view the embedded dashboard in the transaction area of the application page.

This example illustrates the Applications Page after you embed an interactive dashboard.



Once you embed an interactive dashboard, you can view the applied filters in your visualization. Additionally, the chart visualization, control visualization panel, and Add Filter link allow you to interact with the insights and apply filters.

Any change in the Insights triggers the PeopleCode associated with the control field, which then makes the necessary UI changes. The control field code allows you to fully control the interactive behavior.

Note

Each filter change in the dashboard triggers a server request, which subsequently refreshes the dashboard to retrieve the latest available data securely. For real-time indexing-enabled search definitions, the data update is real-time after every refresh. For best page performance, it is recommended to use only one interactive dashboard per page.

In certain scenarios, the dashboard refreshes after a filter change. This is due to a full refresh issued by the component processor instead of a partial page refresh.

Example of control field code.

```
import PTSF_FILTERS:*;

Local PTSF_FILTERS:InsightConsolidatedFilters &Filter = create
PTSF_FILTERS:InsightConsolidatedFilters(EOWC_EMB_IN_WRK.DESCRLONG.Value);

Local array of PTSF_FILTERS:Filter &insightFilters;
&insightFilters = &Filter.getFilterArray();

Local string &key, &attribute, &operator;
Local boolean &negate;
Local array of string &values;
```

```

For &i = 1 To &insightFilters.Len
    &key = &insightFilters [&i].getKey();
    &attribute= &insightFilters [&i].getAttribute();
    &operator = &insightFilters [&i].getOperator();
    &negate = &insightFilters [&i].getNegate();
    &values = &insightFilters [&i].getValues().Clone();
End-For;

```

Switching Interactive Insights Dashboards

Dashboard switching enables applications to replace the configured Interactive Insights dashboard when an application page loads. Use this functionality when the same application page is used in different contexts and each context requires a different dashboard.

You can switch Interactive Insights dashboards by using one of these approaches:

- Using an application class
- Using the built-in PeopleCode functions

Use the application class approach when the dashboard override is handled through configured application logic and does not depend on page Activate PeopleCode. In such cases, define a method named *GetOverriddenValues()* in the corresponding application class. For more information, see *OverrideConfiguredValues Class*.

Use the built-in PeopleCode function when the application must switch the dashboard from page PeopleCode, such as the page *Activate* event. For more information, see *SwitchInsightsDashboardand SetDefaultDashboard*.

Using a Dashboard that is Embedded in Fluid WorkCenter

After you embed a dashboard in Fluid WorkCenter page, you can associate the newly created Insights CREF with your Fluid WorkCenter. Use the *Configure Pagelets* page to create links and activate the links for the CREF.

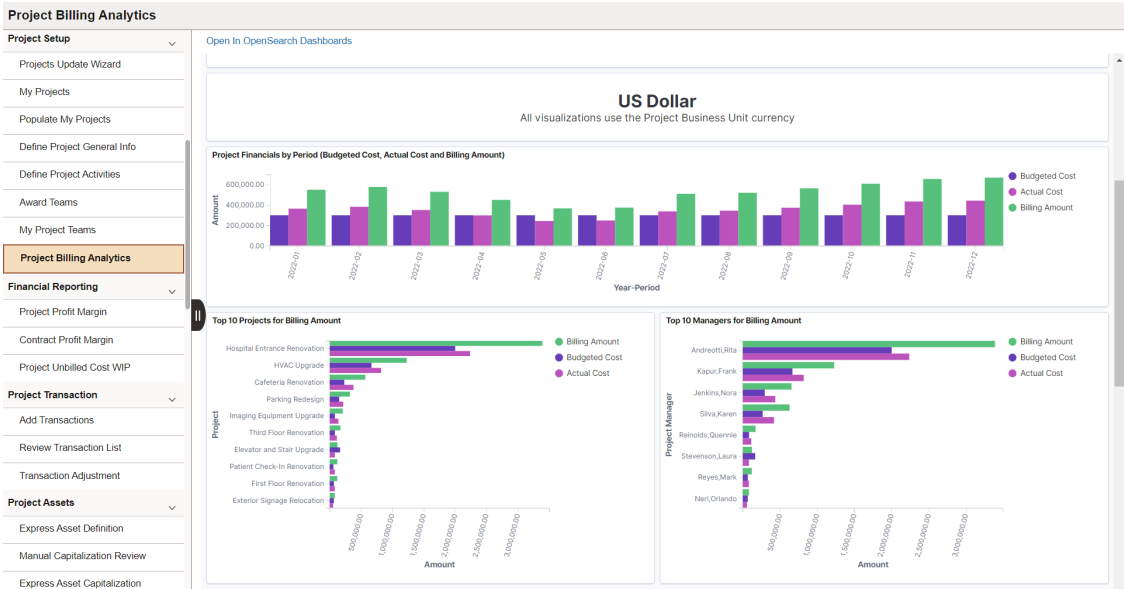
For more information, see *PeopleSoft HCM 9.2: Application Fundamentals*, “Understanding PeopleSoft Fluid WorkCenters”.

Use the following steps to associate a new CREF to Fluid WorkCenter using the *Configure Pagelets* page:

1. Select **Enterprise Components**, and then **WorkCenter/Dashboards**, and then **Configure Pagelets**.
2. Choose the Fluid WorkCenter to which you want to associate the new CREF.
3. Associate the new CREF to Fluid WorkCenter.
4. After you add the new CREF, activate the link.
5. Save the page.

For more information, see *PeopleSoft HCM 9.2: Enterprise Components*, “Configuring Pagelets”.

This example illustrates the Fluid WorkCenter after you integrate a dashboard.



Copying Dashboards Using ADS Definitions

Oracle delivers ADS definitions to copy or migrate dashboards from one environment to another.

For information on using ADS, see Lifecycle Management Guide: Understanding ADS Projects.

ADS Definitions for OpenSearch

The following table lists the ADS definitions:

ADS Definition	Description
PTSF_INSIGHTS_DBOARD_ATT	Defines the JSON files of a dashboard.
PTSF_INSIGHTS_DB_CREATE_ROLE	Defines the privileges assigned to a role with respect to a dashboard.
PTSF_INSIGHTS_DBOARD_DTL	Defines the deployed dashboards.
PTSF_INSIGHTS_DBOARD_ROLE_MAP	Defines the roles mapped to a dashboard.
PTSF_INSIGHTS_SYSDb	Defines the system monitoring dashboards that are imported and deployed.
PTSF_DBOARD_REPLACE_TOKEN	Defines the configuration placeholders and replacement values for tokens within the dashboard JSON.

Records Used in ADS Definitions

The following table lists the records that are used in the ADS definitions for OpenSearch:

Record	Purpose	Merge Group	Custom Transform	Customization	Comments
PTSF_DBOARD_DTL	Stores the dashboard details.	Yes	No	No	The PTSF_KIB_ROLE record is its child. Has a relation to the PTSF_INSIGHTS_DBOARD_ATT dataset.
PTSF_DBOARD_ATT	Attachment table that stores the dashboard JSON files.	No	No	No	
PTSF_KIB_ROLE	Maps dashboard to roles.	Yes	No	No	The customer's (target's) privilege (Edit/View access) is preserved.
PTSF_KIBCR_ROLE	Stores the roles assigned with Create access in OpenSearch Dashboards.	No	No	No	
PTSF_KIB_SYSDB	Stores the server metrics dashboard details.	No	No	No	Has a relation to the PTSF_INSIGHTS_DBOARD_ATT dataset.

Note

Copying of tile configuration using ADS requires purging of cache and restarting of the application server domain on the target environment.

Configuring High Availability in PeopleSoft Search Framework

Understanding High Availability Feature in PeopleSoft Search Framework

OpenSearch uses distributed architecture and is built to be always available. OpenSearch uses clusters and nodes to provide high availability.

Oracle PeopleSoft's recommended approach to high availability is to deploy an OpenSearch cluster with at least 3 nodes on machines that are not on the same physical server and by following the configuration guidelines provided by PeopleSoft Search Framework. The high availability feature of OpenSearch enables PeopleSoft Search Framework to provide a fail-over mechanism.

Fail-over Mechanism

PeopleSoft Search Framework uses OpenSearch search engine to provide search functionality. OpenSearch is distributed by nature, that is, it knows how to manage multiple nodes and manages failover through primary shards and replicas. To enable users to take advantage of this fail-over mechanism, PeopleSoft Search Framework provides you the framework to configure multiple nodes in a search instance of your PeopleSoft implementation. Using the constructs of cluster and node of OpenSearch, a search instance in PeopleSoft represents an OpenSearch cluster that can contain multiple nodes.

See [Implementing Fail-over Mechanism Using Multiple Nodes Feature of OpenSearch](#).

In addition to the built-in fail-over mechanism of OpenSearch, PeopleSoft Search Framework provides you another fail-over mechanism by using its feature of configuring multiple search instances for the search engine. Implementing this feature means that you are creating multiple OpenSearch clusters.

See [Implementing Fail-over Mechanism Using PeopleSoft Search Framework's Multiple Search Instance Feature](#).

Implementing Fail-over Mechanism

This topic discusses the two ways of implementing fail-over mechanism in PeopleSoft Search Framework.

Implementing Fail-over Mechanism Using Multiple Nodes Feature of OpenSearch

When you configure PeopleSoft Search Framework with OpenSearch, PeopleSoft Search Framework enables you to implement a fail-over mechanism.

When you use the multiple-nodes option and when you deploy search definitions/categories and generate indexes, OpenSearch automatically distributes the indexed data to the nodes based on its constructs of primary shards and replica shards.

You can create multiple nodes on the same machine or on different machines. If you are creating nodes on different machines, but want the nodes to be on the same cluster, refer to the OpenSearch documentation for information on how you can complete the setup.

To create another node using the installation instructions, refer to *PeopleSoft Deployment Packages Installation for Search Components* for the current release.

Complete these steps to set up multiple nodes in a search instance:

1. After Installing the search engine, you need to configure the search functionality.
2. Use PIA to configure the PeopleSoft Search Framework by creating a search instance.
3. Enter information in the required fields and save the search instance.
4. Install another node on the same machine or on a different machine. Follow the instructions in the *PeopleSoft Deployment Packages Installation for Search Components* for the current release.
5. Reopen the search instance and In the Search Instance Properties grid, add the newly created node.
6. Enter information in the required fields to point to the new node and save the search instance.

Note

In a multi-node OpenSearch cluster, always ensure that the replica value is set to at least 1. For details, see [Managing General Search Options](#).

7. Deploy the search definitions/categories and generate indexes for the search instance.

Note

In a multi-node cluster, for the cluster to be available, ensure that you do not stop half or more of the nodes in the voting configuration at the same time.

Your search functionality is complete and ready for use. In the event that a node fails, PeopleSoft Search Framework automatically points searches to an active node of the search instance.

Implementing Fail-over Mechanism Using PeopleSoft Search Framework's Multiple Search Instance Feature

PeopleSoft Search Framework provides a mechanism for fail-over by enabling you to create multiple search instances. Search Framework enables you to specify priority for these multiple instances so that based on the priority, search will be directed to a different search instance when a search instance fails. If you want to implement this option, you should understand that you need to create another OpenSearch cluster that you will configure as a search instance on the PeopleSoft system.

When you create multiple search instances, you must ensure that you deploy search definitions/categories and generate indexes on all the search instances. This is to ensure that your search instances contain the same searchable data for a user.

Complete these steps to set up multiple search instances:

1. After Installing the search engine, you need to configure the search functionality.
2. Use PIA to configure the PeopleSoft Search Framework by creating a search instance.
3. Create or reuse the existing search definitions and search categories.
4. Deploy the search definitions/categories and generate indexes for the search instance.
Your search functionality is complete and ready for use.
5. Create another OpenSearch cluster by following the instructions in the installation guide.
6. Use PIA to configure the PeopleSoft Search Framework by creating a search instance.
7. Deploy the same search definitions/categories and generate indexes on the new search instance, that is, you are creating another cluster with the same details.
8. On the Search Administration page **PeopleTools**, and then **Search Framework**, and then **Administration**, and then **Search Administration**, specify the priority for the search instances.

In the event that a search instance fails, PeopleSoft Search Framework will automatically point searches to the next search instance as specified in the priority list.

Related Topics

- [Working With Search Instances](#)
A search instance in the PeopleSoft Search Framework represents a single instance of the search engine. The search instance(s) created using the PeopleSoft Search Framework define the instances that will be used by the PeopleSoft applications to provide end user search.

Integrating External Data with PeopleSoft

Understanding the Integration of External Data with PeopleSoft

PeopleSoft enables you to integrate external data with PeopleSoft through an integration mechanism. Based on your business requirements, you may want to integrate external data with PeopleSoft to enable you to arrive at business decisions, use data for visualization and analytics, supplement existing data in PeopleSoft, and so on. For example, as a PeopleSoft HCM payroll user, you may want information about your company products that are purchased, but this information is in external systems. As a PeopleSoft FSCM user, you may prefer to perform cash discounting or dynamic discounting based on federal funds rate, and the federal funds rate information is in an external system.

If you plan to use the integration mechanism, you should ensure that the following requirements are met:

- Credentials for data retrieval from an external system.
- Network infrastructure that allows you to connect to the external system.
- Pre-defined roles and users who have the permissions or access to the external data.

PeopleSoft uses the following PeopleSoft products and third-party tools in the integration mechanism:

- PeopleSoft Search Framework
- OpenSearch
- Logstash

Setting Up the Integration of External Data with PeopleSoft

Before you set up the integration of external data with PeopleSoft, you must decide whether SSL configuration for Logstash is required.

If you need to configure SSL for Logstash, see [Configuring SSL for Logstash](#).

To set up the integration of external data with PeopleSoft, you must complete the following steps:

1. Create a search definition for external data.
2. Deploy the external data search definition.
3. Specify a data source for the external data search definition.
4. Build an index for the external data search definition.

To complete these steps, you may either use the External Data Source Setup navigation collection or the individual pages.

Creating a Search Definition for External Data

Use the External Definition page to create a new search definition for external data and to view a list of existing search definitions for external data. You could create a search definition for each functional area, for example, recruiting, job data, and so on.

Access the External Definition page by selecting **PeopleTools**, and then **Search Framework**, and then **Deploy External Source Defns**, and then **External Data Source Setup**, and from the left panel, choose External Data Search Defns and select the Add Definition or plus button.

Alternatively, you may select **PeopleTools**, and then **Search Framework**, and then **Deploy External Source Defns**, and then **External Data Search Defns**.

To create a new definition, select the Add Definition or plus button that displays the External Definition page.

This example illustrates the fields and controls on the External Definition page. You can find definitions for the fields and controls later on this page.

Cancel

External Definition

Save

*Definitions

Description

Attributes

1 row

Target Attribute	*Type	Attribute Description		
1			+	-

PeopleSoft Data Mapping

1 row

Search Definition	Search Attribute		
1			+

Security

☒ No Security

☐ Source Level Security

☐ Component Level

Field or Control	Description
Definition	Specify a name for the search definition.
Description	Enter a description.

Attributes

You use the Attributes section to specify the attributes which are available in the external data and are functionally relevant in the external data index. Attributes are fields that form a part of each document in the index of external data. You decide which attributes you want based on the functional information that you require in the index. These attributes can be obtained either from the external data or from PeopleSoft mapping to existing PeopleSoft fields.

Field or Control	Description
Target Attribute	Enter an attribute that is available in the external data that you want to include in the index.

Field or Control	Description
Type	Choose a type for each attribute. The selected type is defined in the search engine as part of the index mapping.
Attribute Description	Enter a description for an attribute.

PeopleSoft Data Mapping

This section enables you to map some of the defined attributes with existing PeopleSoft fields. The purpose of PeopleSoft mapping is to provide fixed values per data source for each document indexed from a data source. The PeopleSoft mapping also helps to group all the documents for each data source with a specific attribute value stored in PeopleSoft.

Field or Control	Description
Search Definition	Choose a search definition that has the attribute that you want to map with the external data.
Search Attribute	Choose the attribute that you want to map.

Security

Field or Control	Description
No Security	Select to define no security restriction for a search definition's data. Anyone with access to the application can view the data for a search definition set to No Security. That is, the data is public to all users.
Source Level Security	Select to allow or restrict access to the entire search definition as per the specified user or role. That is, only specified users and roles are able to view data for that search definition. Specify values for the following fields: - Type - Select user or role, that is, set the scope of the intended access restriction. - Name - Choose a role or user name. - Privilege - Select Deny or Allow, that is, set the restriction or access privilege. For more information on source level security, see Setting Source Level Security.

Field or Control	Description
Component Level	Select to associate component level security with the external data search definition, that is, users who have access to a component can view the data of the external data search definition. Specify values for the following fields: - Market - Select a Market for the component. - Component Name - Choose a component to associate with the external data search definition. - Search Criteria - Enter any additional custom search criteria to be added automatically to the search engine search query. The search criteria should take the form ATTRIBUTENAME:VALUE and can use keywords and brackets. For example: <i>PTSF_SBO_NAME:EP_AP_VENDOR & (-STATUS:PND)</i> For more information on search criteria, refer to Mapping Components to Search Definitions.

Deploying an External Data Search Definition

Use the Deploy External Search Defns page to deploy the external data search definition and create a placeholder in the search engine.

Access the Deploy External Search Defns page by selecting **PeopleTools**, and then **Search Framework**, and then **Deploy External Source Defns**, and then **External Data Source Setup**, and from the left panel, choose Deploy External Search Defns.

Alternatively, you may select **PeopleTools**, and then **Search Framework**, and then **Deploy External Source Defns**, and then **Deploy External Search Defns**.

This example illustrates the fields and controls on the Deploy External Search Defns page. You can find definitions for the fields and controls later on this page.

External Data Search Defns

Deploy External Search Defns

Define External Data Sources

Manage External Search Index

Deploy External Search Defns

Definition	Index Name	Created On	Count	Create/Delete Index
1 EXT_PRODUCT_INFO	ext_product_info_t5901jdc	03/07/21 9:18PM	0	Delete

Field or Control	Description
Definition	Displays a list of external data search definitions.
Index Name	When you click the Create button, the name of the index for the specified external data search definition is generated. The naming convention is the name of the search definition with the database name appended to it.

Field or Control	Description
Created On	Displays the day and time when the index was created for the specified search definition.
Count	Displays the count of documents in an index. On the Deploy External Search Defns page, the count is zero because the index for the search definition is not built. After an index is built, the number of documents in an index is displayed.
Create/Delete Index	Select the Create button to create a placeholder for the index in the search engine. Select the Delete button to delete the index. The delete action only removes the index placeholder from the search engine; it does not delete the search definition.

Specifying a Data Source for External Data Search Definition

Use the Data Source Definition page to specify the actual source of data. In this context, a data source represents the actual source of external data from which the required data is retrieved and indexed.

Access the Data Source Definition page by selecting **PeopleTools**, and then **Search Framework**, and then **Deploy External Source Defns**, and then **External Data Source Setup**, and from the left panel, choose Define External Data Sources.

Alternatively, you may select **PeopleTools**, and then **Search Framework**, and then **Deploy External Source Defns**, and then **Define External Data Sources**.

This example illustrates the fields and controls on the Data Source Definition page. You can find definitions for the fields and controls later on this page.

Cancel
Data Source Definition
Save

*Data Source Name

Search Definition

▼ **Input**

*Data Source Type URL ▾

*Method GET ▾

URL

▶ **Header**

Body

Proxy

Additional Options

▶ **Filters And Transformations**

▶ **Output**

▶ **Test External Data Source**

Field or Control	Description
Data Source Name	Specify a name for the data source.
Search Definition	Select an external data search definition to associate with the data source definition. If you're creating a data source for intermediate processing, you do not associate a search definition with it.

Input

In the Input and Header sections, the fields that appear are based on your selection of data source type.

Field or Control	Description
Data Source Type	Select a type for the data source. Valid options for type are: - File - A CSV file that contains the actual data. - URL - A REST end point to which a request is made and it provides data as a response.
File Type	The File Type field appears when you select File as data source type. Note: CSV is the only supported file type.

Field or Control	Description
File Name	The File Name field appears when you select File as data source type. All external CSV files should be placed in the <i>psftappdata</i> folder under <LOGSTASH_HOME>. Any generated files are also saved to this folder. Specify the absolute path of the CSV file.
Method	The Method field appears when you select URL as data source type. Choose the type of HTTP request that needs to be issued. Valid options for method are: • GET • POST • PUT
URL	The URL field appears when you select URL as data source type. Specify the path of the external data. The path should not be absolute; it should be relative. Path should be relative to <LOGSTASH_HOME>/psftappdata.

Header

Field or Control	Description
Body	The Body field appears when you select URL as data source type. This field contains the JSON request for the POST and GET methods.
Proxy	Specify the proxy server details for REST API connection.
Additional Options	Specify any additional connection parameters.

Filters and Transformations

This example illustrates the fields and controls on the Filters and Transformations section of Data Source page. You can find definitions for the fields and controls later on this page.

Filters And Transformations

*Type

Peoplesoft

External Search Definition Attributes

Split Fields

itemsummaries

Data Source Attribute Mappings

4 rows

Target Attribute ↑↓	Type ↑↓	Source Attribute ↑↓	Fixed Value ↑↓	Key field? ↑↓	Suggestions
EXT_BRAND	String			☐	Q
EXT_CATEGORY	String		Sports	☐	Q
EXT_DESCRIPTION	String	[itemsummaries][title]		☐	Q
EXT_PRODUCT_NUMBER	Int			☒	Q

PeopleSoft Mappings

1 row

Search Definition ↑↓	Search Attribute ↑↓	Mapping Value ↑↓	Suggestions
1 QE_CL_ITM_M	QE_CATEGORY_ID		Q

In the Filters and Transformations section, the fields that appear are based on your selection of type.

Field or Control	Description
Type	Specify the type of data transformation that you want to achieve. - External - Select external if a data source is created for intermediate processing, that is, the data source is created to generate data which needs to be processed further before sending to the search engine. - PeopleSoft - Select PeopleSoft if you're mapping the data source with an external data index.

External Attributes

The External Attributes section appears when you select External as the type.

Field or Control	Description
Split Fields	You need to specify split fields when you select URL as the data type. You indicate a field from the data source, which requires a split. When a request is made to the REST end point specified in the URL type, it returns a response containing JSON documents. These JSON documents can be nested or hierarchical in nature. If the data you require is under a parent node, then you need to use the split fields option to obtain the children under the parent node. For example, in a product data source, the information related to a product is under a parent node called itemSummaries. To obtain the information of sub-products (children) under the parent node for further mapping, you need to split the field.
Allowlist	Use this field to limit or filter the data from the data source that is passed to the search engine. Enter comma separated values in this field. If you do not enter any values here, all data from the data source will be passed to the search engine.

External Search Definition Attributes

The External Search Definition Attributes section appears when you select PeopleSoft as the type.

Field or Control	Description
Split Fields	You need to specify split fields when you select URL as the data type. You indicate a field from the data source, which requires a split. When a request is made to the REST end point specified in the URL type, it returns a response containing JSON documents. These JSON documents can be nested or hierarchical in nature. If the data you require is under a parent node, then you need to use the split fields option to obtain the children under the parent node. For example, in a product data source, the information related to a product is under a parent node called itemSummaries. To obtain the information of sub-products (children) under the parent node for further mapping, you need to split the field.

Data Source Attribute Mappings

In this section, you map the attributes of the external data search definition to the attributes of the data source. The attributes of the external data search definition associated with this data source are displayed enabling you to map these attributes to the attributes of the data source.

Field or Control	Description
Target Attribute and Type	Contains the attributes and its type from the external data search definition that you associated with the data source. These values cannot be edited here.
Source Attribute	As part of the mapping of the external data search definition with the attributes of data source, if you need to map any nested fields under a split attribute, the mapping can be done using the split field as described in the previous section. For example, to map the field, Title, under itemSummaries, you should enter it as [itemSummaries][title] in the Source field.
Fixed Value	The Fixed Value column enables you to specify a value that meets your requirements. For example, for the City source attribute, you want information only about San Francisco, so you should specify San Francisco in the Fixed Value column.
Key field	Enable the check box to select a key field that has unique values. When you start indexing on the Manage External Search Index page, Logstash generates an indexing configuration that uses this field for incremental indexing. It only indexes the updated and new rows. If the Key field is not enabled, recrawl indexes the data again, and incremental indexing is not performed. To avoid duplication of data after recrawl, you must delete the index, recreate it, and recrawl.
Suggestions	When you select the suggestions icon, it displays the attributes from the actual data source, which you can choose for the Source Attribute column.

PeopleSoft Mappings

Use the PeopleSoft Mappings section to map a specific value from the data source to the PeopleSoft attribute. The mapping from the external data search definition, which you associated with this data source, is displayed here.

Field or Control	Description
Search Definition	The search definition defined in the PeopleSoft Mapping section of the external data search definition is displayed here. This field is read-only.

Field or Control	Description
Search Attribute	The search attribute defined in the PeopleSoft Mapping section of the external data search definition is displayed here. This field is read-only.
Mapping Value	Map a specific value from the data source to the PeopleSoft attribute. For example, the EP_AP_VENDOR search definition contains the VENDOR_NAME_SHORT attribute. For this attribute for the vendor, XYZ, the value stored in PeopleSoft is XYZ01. You should enter this value, XYZ01, in the Mapping value column. This value is added to all the search engine documents which are indexed and obtained from the XYZ data source.
Suggestions	Displays the values from the selected search attribute, which you can choose for the Mapping Value column.

If an external search definition, which is mapped to an external data source, is updated, then the updated data automatically reflects on this page.

Output

In the Output section, you specify where the data source output should be stored.

Field or Control	Description
Output Type	Select an output type based on your requirement. • Search engine - Save the external data to the search engine. • File - Select File for data sources created for intermediate processing. If you select File, the following two fields—Codec and File—are displayed.

Field or Control	Description
Codec	The Codec field corresponds to the codec setting of the Logstash file output plugin. The external data that is sent as input requires to be transformed in order to ensure that it has all the necessary attributes to be used in PeopleSoft. The following sample code shows the transformed data. <pre>%{[categories][id]},https://api.myproducts.io/newproducts/categories/%{[categories][id]}?api-version=2018-10-18&Subscription-Key=c455d00cb0f64e238a5282d75921f27e</pre> Output gets transformed from: <pre>"id" : "6642", "name" : "Prepared Foods", "type" : "1", "_links" : [{ "href" : "/newproducts/categories/6642?api-version=2018-10-18", "rel" : "self", "type" : "GET" }] }</pre> To: <pre>6642,https://api.myproducts.io/newproducts/categories/6642?api-version=2018-10-18&Subscription-Key=c455d00cb0f64e238a5282d75921f27e</pre> For more information on the codec setting, refer to Logstash documentation, which is available on www.opensearch.org.
File	Specifies the location of the file.

Test External Data Source

This section enables you to check the REST end point request and response.

Field or Control	Description
Request	Specify a request to test the data source.
Response	Displays the REST end point response.

Field or Control	Description
Submit	When you click Submit, the REST end point request is initiated.

Building an Index for an External Data Search Definition

Use the Manage External Search Index page to control the indexing of data from the defined data sources using Logstash. The page lists the existing data sources and enables you to schedule the index build process or immediately start or stop the indexing process.

Access the Manage External Search Index page by selecting **PeopleTools**, and then **Search Framework**, and then **Deploy External Source Defns**, and then **External Data Source Setup** and from the left panel choose Manage External Search Index.

Alternatively, you may select **PeopleTools**, and then **Search Framework**, and then **Deploy External Source Defns**, and then **Manage External Search Index**.

This example illustrates the fields and controls on the Manage External Search Index page. You can find definitions for the fields and controls later on this page.

External Data Search Defns

Deploy External Search Defns

Define External Data Sources

Manage External Search Index

Manage External Search Index

1 row

Data Source Name	Definition	Index Name	Count	Created On	Schedule	Start/Stop
1 EXT_PRODUCT	EXT_PRODUCT_INFO	ext_product_info_t5901jdc	0	03/07/21 9:18PM		Start

Field or Control	Description
Data Source Name	Specifies the data sources that you added on the Data Source page.
Definition	Specifies the external data search definition that you associated with a data source.
Index Name	Displays the index name for the specified external data search definition. The index name is generated when you deploy the search definition.
Count	Indicates the document count for each search definition.
Created On	Indicates the day and time when the index was built.
Schedule	Enables you to set up the time and frequency of the indexing process. The Schedule Definition page is described later in this topic.
Start/Stop	When you select Start, Logstash initiates the indexing process as per the schedule you've set. When you select Stop, Logstash aborts the indexing process.

Scheduling the Indexing Process

Use the Schedule Definition page to specify the time and frequency of the indexing process, which is performed by Logstash. The scheduling information is stored in the Logstash

configuration file. After setting the time and frequency schedule, you must select the Start button (on the Schedule Definition page) that initiates the indexing process as per the schedule.

Access the Schedule Definition page by selecting the calendar icon on the Manage External Search Index page.

This example illustrates the fields and controls on the Schedule Definition page. You can find definitions for the fields and controls later on this page.

Cancel

Schedule Definition

Done

Schedule At

Date

12/15/2020

Minute

▼

Hour

▼

Repeat Hourly

Every

Repeat Weekly

Days

▼

Field or Control	Description
Schedule At	Specify the date and time when you want the index process to commence. The Schedule page provides you the flexibility to specify the exact minute to commence the indexing process. The time and frequency options are mutually exclusive. When you schedule the date and time for the indexing process, the other two frequency options are not considered and vice versa.
Repeat Hourly	Specify to repeat the indexing process by the number of hours, for example, you can set it to repeat every four hours.
Repeat Weekly	Specify to repeat the indexing process on a specific day of the week and the indexing process repeats every week on the specified day.

Note

The default schedule for indexing is one minute. If you do not set the time or frequency, the system runs the indexing process after one minute from the time you press the Start button. It runs only once after one minute and does not repeat.

Note

After you've set the schedule and saved it, ensure that you select the Start button. The Start button initiates the indexing process as per the schedule.

Troubleshooting

Creating Users and Assigning Roles for a Search Instance

After you install the search engine, you need to create users and assign roles to users in the search instance. These users in the search instance are necessary to validate the incoming requests from PeopleSoft Search Framework. While the user information is maintained in the `users.yml` file, the role information is maintained in the `userroles.yml` file at `OS_HOME/plugins/orcl-security-plugin/config/properties`.

The following roles are delivered to perform specific operations:

- read - to provide permission as read-only.
- admin - to perform read and administrative operations.
- security - to access the security index.

To create users and assign roles to users, use the `opensearchuser` script available in `OS_HOME/bin`. You can use the script for the following purposes:

- To add a new user or change password for a user:

```
opensearchuser adduser [user]
```

- To assign roles to an existing user:

```
opensearchuser addrole [user]
```

Use commas to separate the roles assigned to a user.

- To view existing users:

```
opensearchuser listusers
```

- To view roles of a user:

```
opensearchuser listrole [user]
```

- To remove a user:

```
opensearchuser removeuser [user]
```

- To encrypt the given text, for example, a password:

```
opensearchuser encrypt [text]
```

This command is used for encrypting the keystore password while configuring SSL. The password needs to be encrypted in the `opensearch.yml` configuration file.

- To create a new key:

```
opensearchuser buildkey
```

This command creates a new key to encrypt password in text file.

For example, you may want to create a superuser with the roles of admin and security assigned to the superuser.

1. `opensearchuser adduser superuser`

Enter a password and confirm the password.

2. `opensearchuser addrole superuser`

Enter the password.

Enter comma separated list of roles, for example: admin,security.

Related Topics

- [Working with Authentication and Authorization](#)
Search Framework handles various security related tasks, including:

Managing OpenSearch Services

This appendix describes how you can manage an OpenSearch service.

Managing an OpenSearch Service on Linux

After installing OpenSearch, you can add an OpenSearch service, verify that the service starts automatically, and remove the service.

Adding OpenSearch as a Service

To add OpenSearch as a service and verify that the service is created:

1. Open a terminal window, running as root.
2. Change directory to `OSK_INSTALL/setup`:
`cd OSK_INSTALL/setup`
3. Run this command to add the service:
`./psft-os-service.sh --add --install_base_dir BASE_DIR`
4. Use one of these methods to verify that the service was added:
 - The output of the following `ps` command must show a running OpenSearch process:
`ps -ef | grep opensearch`
 - Use the `systemctl` command:
`systemctl status opensearch`

This should give an output with the status "active (running)," as shown in the following sample:

```
opensearch.service - OpenSearch
Loaded: loaded (/etc/systemd/system/opensearch.service; ⇒
enabled; vendor preset: disabled)
Active: active (running) since Wed 2023-03-29 07:31:14 UTC; 17s ago
Docs: https://opensearch.org/
Main PID: 121629 (java)
Tasks: 34 (limit: 190191)
Memory: 2.2G
CGroup: /system.slice/opensearch.service
```

Verifying that the OpenSearch Service Starts Automatically

After you install the OpenSearch service and verify the installation, test to make sure the service starts automatically after you reboot the Linux server.

1. Reboot the Linux server.
2. Verify that the service has come up automatically.

Use this command to verify that the service has come up automatically:

```
systemctl status OpenSearch
```

This should give an output with the status "active (running)," as shown in the following sample:

```
opensearch.service - OpenSearch
Loaded: loaded (/etc/systemd/system/opensearch.service; ⇒
enabled; vendor preset: disabled)
Active: active (running) since Wed 2023-03-29 07:31:14 UTC; 17s ago
Docs: https://opensearch.org/
Main PID: 121629 (java)
Tasks: 34 (limit: 190191)
Memory: 2.2G
CGroup: /system.slice/opensearch.service
```

Removing the OpenSearch Service

To remove the OpenSearch service:

1. Open a terminal window, running as root.
2. Change directory to OSK_INSTALL/setup:

```
cd OSK_INSTALL/setup
```
3. Run this command to remove the service:

```
./psft-os-service.sh --delete
```
4. Use one of these methods to verify that the service was deleted
 - The output of the following ps command should not include any OpenSearch process:

```
ps -ef | grep opensearch
```
 - Use the systemctl command:

```
systemctl status opensearch
```

Troubleshooting OpenSearch Configuration

This appendix describes some of the administrative functions you can perform on OpenSearch using the command prompt and how to handle some common errors.

Performing Administrative Tasks

This section describes some of the administrative tasks you can perform in OpenSearch using the command prompt.

Adding or Deleting a Node

When you add or delete a node, the shards and replicas are dynamically distributed across the available nodes.

Note

The number of replicas determine the number of nodes that can go down without any data loss. The maximum number of replicas should be less than the number of nodes, that is, one less than the number of nodes. Replicas that are equal to or greater than the number of nodes do not add any benefit to the cluster, rather indexing will fail in such a scenario.

Changing the Node Type

When you deploy the OpenSearch search engine using the DPK that PeopleSoft delivers, by default the node type is set to master-data type.

If you want to change the node type, you need to update the *opensearch.yml* configuration file.

To specify a data node, for example, set

```
node.master: false  
node.data: true
```

You should specify this setting before the node is brought up.

Viewing the List of Indexes in an OpenSearch Cluster

After deploying search definitions and building indexes, you can find out the list of indexes present in your OS Cluster by executing the following command in the browser:

```
http(s)://host:port/_cat/indices?v
```

You can use a similar command to view the plug-ins in your OpenSearch implementation:

```
https(s)://host:port?_cat/plugins?v
```

Handling Common Errors

If you want to troubleshoot the PeopleSoft Search Framework and OpenSearch integration or any search related issues, Oracle PeopleSoft recommends, as an initial step, to check the following:

- Ensure that the integration of OpenSearch with PeopleSoft Search Framework is correctly completed. You can check the integration using the Ping, Login Test, and Proxy Test and Validate buttons on the Search Instance Properties page in PIA.
- If you've installed OpenSearch Dashboards and configured it, you can use the Indexing Metrics dashboard to view whether the indexing process is successful or not. If the

Transaction Status visualization displays errors in indexing, click the error slice of the pie-chart, and obtain the process instance ID and the index name.

- Check the run control ID on the Schedule Search Index page for any errors.
 - In case of an error, the View Error link gives you a clue on the error.
 - The Schedule Search Index page also displays a link where you can view the IB transactions from asynchronous service monitoring.
 - If the Schedule Search Index page has no details, click the Message Log link and follow the steps in it.
- Check the Integration Broker queues.

Note

If Full Direct Transfer is enabled, then Integration Broker is bypassed. You should check the Indexing Metrics dashboard for indexing errors. If Full Direct Transfer is not enabled, the Indexing Metrics dashboard does not capture data, so you should check the Integration Broker queues for indexing of documents without attachments.

- Navigate to the Asynchronous Services page (**PeopleTools**, and then **Search Framework**, and then **Search Admin Activity Guide**, and then **Administration**, and then **Asynchronous Services**) and in the Queue Level field, select Sub Contract.
- Verify the Queue status for the PTSF_ES_SEND_Q queue.
- If PTSF_ES_SEND_Q status is New, verify whether the IB Pub/Sub domain is active or not and activate if required (by selecting **PeopleTools**, and then **Search Framework**, and then **Search Admin Activity Guide**, and then **Administration**, and then **Domain Status**).

Ensure that there are no previous error transaction with the same subqueue name.

- If PTSF_ES_SEND_Q status is Error, read the error message.

If the error was due to unavailability of the OpenSearch server, that is, no connectivity with IB, you may resubmit the transaction.

If you need more clarity on the error and need to troubleshoot further, activate the IB message log to level 5 and submit the transaction, and watch for the response from OpenSearch.

- Check the PeopleSoft MsgLog to identify reported errors.

MsgLog is located in

<PIA_HOME>\webserv\<DOMAIN>\applications\peoplesoft\PSIGW.war\WEB-INF folder.

- Check the OpenSearch logs to identify reported errors.

OpenSearch logs are logged by default in the OS_HOME/logs folder. However, you can specify the location of the log folder in the opensearch.yml configuration file.

Errors in MsgLog

Error	Possible Cause	Resolution
<code>{"error":{"root_cause":[{"type":"orcl_auth_plugin_exception","reason":"Invalid user/password"}],"type":"orcl_auth_plugin_exception","reason":"Invalid user/password"},"status":401}</code>	This might be due to invalid proxy user and password.	In PIA, navigate to the Search Instance Properties page and in the Search Instance Properties section, ensure that the proxy user and password are entered correctly. Click the Proxy Login button and if the credentials are correct, you should see a login success message.
<code>": {"type":"unavailable_shards_exception","reason":"[orcl_es_defaultindex_h9285505][0] Not enough active copies to meet write consistency of [QUORUM] (have 1, needed 2). Timeout: [1m], request: [BulkShardRequest to [orcl_es_defaultindex_h9285505] containing [304] requests]}"} }</code>	This message is displayed because the number of replicas are more than the number of nodes.	In PIA, navigate to the Search Options page and update the replicas to a number that is less than or equal to the number of nodes in the cluster.

Errors in OpenSearch Logs

Error	Possible Cause	Resolution
<code>ConnectTransportException[[host][ipaddress:9300] connect_timeout[30s]]; nested: ConnectTimeoutException[connection timed out: / ipaddress:9300]; at org.opensearch.transport.netty.NettyTransport.connectToChannels(NettyTransport.java:987)</code>	This is due to one node trying to connect other node to form the cluster. However, the IP address of the other node is not reachable.	Navigate to \$OS_HOME/config and ensure that the network.host and discovery.zen.ping.unicast.hosts values contain the correct machine details.
<code>org.opensearch.transport.BindTransportException: Failed to resolve host</code>	OpenSearch network host is set to a host name or IP address that is not resolvable.	Set it to the IP address of the machine where OpenSearch is running.
<code>RemoteTransportException-EsRejectedExecutionException</code>		Set the threadpool.bulk.queue_size value to a value higher than the number of concurrent bulk requests you want to send.

Errors on PIA

Error	Possible Cause	Resolution
Integration Gateway - External System Contact Error Integration Gateway was not able to contact the external system. The network location specified may be incorrect, or the site is permanently or temporarily down.	This error might be due to no connectivity to the OpenSearch server.	In PIA, navigate to the Search Instance Properties page, and ensure that the correct host name and port are entered. Click the Ping button and verify whether the OpenSearch server is up and running.
Search Instance Ping not working.	This error might be due to the following reasons: • Incorrect configuration of Integration Broker. • Exception in OpenSearch. • OpenSearch server is down or invalid network host. • Incorrect configuration of search instance.	1. Check if Integration Broker is configured correctly and ping the IB node to verify. If IB is correctly configured, check whether the OpenSearch server is up and running. You can ping the OpenSearch server from any browser by entering the server and port, for example, <code>http://server:port</code>. 2. If the ping from a browser is not successful, but the OpenSearch server is up, ensure that the <code>network.host</code> property in the <code>opensearch.yml</code> configuration file found in <code>OS_HOME/config/</code> contains the correct server name (if you host your own OpenSearch server).
Deploy is throwing errors.	This error might be due to one or more search definitions in deployed state, but unavailable in OpenSearch.	1. Check if any other search definition is already deployed. If so, select the search definition and click Report Sync. If the definitions are unavailable in the server, reset the definitions so that you can deploy them again. 2. If you do not want to do Step 1 and you need to deploy only a few definitions, then in the Index Settings, click the override option and change the Index name to the search definition name and deploy.

Error	Possible Cause	Resolution
Index schedule status shows success, but search results are not displayed.	This message may be due to security of the search user or the security call back may not be responding with the correct values.	If the security response is empty or does not contain the security values applicable then revisit the security given to the user. 1. Ensure that some documents are indexed in OpenSearch. Use the OpenSearch Interact page to check whether documents are indexed in OpenSearch. 2. If security is enabled on a search definition, then set the IB logging to 5 and then perform the test again. Verify whether a security call back took place. 3. If the security response is empty or does not contain the required security values, then check the security applied for the user.

Error	Possible Cause	Resolution
Unable to deploy a search definition due to validation_exception. Sample error message: <pre> Unable to deploy\ index search definition <search definition name> due to error Index creation Failed : validation_exception (262,2012) PTSF_ES.ESIMPL.AdminService.OnExecute Name:AddIndexSettings PCPC:25544 Statement:345 Called from:PTSF_ES.ESIMPL.AdminService.OnExecute Name:AddPSFTSource Statement:902 Called from:PTSF_ES.ESIMPL.AdminService.OnExecute Name:AddPSFTSources Statement:909 Called from:PTEM_CONFIG.PTSFAdministerSearch.OnExecute Name:deployPeoplesoftSource Statement:519 Called from:PTEM_CONFIG.PTSFAdministerSearch.OnExecute Name:deploySearchDefinition Statem (0,0) PTSF_ES.ESIMPL.AdminService.OnExecute Name:AddIndexSettings PCPC:25664 Statement:350 </pre>	This error is due to the soft limit on the number of shards to 1000.	Resolution - increase the number of shards per node as required. To increase the number of shards per node, for example, to 1500, use this command: <pre> CURL -XPUT http:// <eshost>:<port>/ _cluster/settings </pre> and in the body type the following line: <pre> {"persistent": {"cluster.max_shards_per_node":1500}} </pre>

Managing OpenSearch Dashboards Services

This appendix describes how you can manage the OpenSearch Dashboards service.

Managing an OpenSearch Dashboards Service on Linux

After you install OpenSearch Dashboards using the delivered DPK, you can add an OpenSearch Dashboards service, verify that the service is created, or delete the service.

Adding OpenSearch Dashboards as a Service on Linux

To add an OpenSearch Dashboards service:

1. Open a terminal window, running as root.
2. Change directory to OSK_INSTALL/setup:
`cd OSK_INSTALL/setup`
3. Run this command to add the service:
`./psft-osd-service.sh --add --install_base_dir BASE_DIR`
4. Use one of these methods to verify that the service was added:

- The output of the following `ps` command must show a running OpenSearch Dashboards process:

```
ps -ef | grep node
```

- Use the `systemctl` command:

```
systemctl status opensearch-dashboards
```

This should give an output with the status "active (running)," as shown in the following sample:

```
opensearch-dashboards.service - OpenSearch Dashboards
Loaded: loaded (/etc/systemd/system/opensearch-dashboards.service;
enabled; vendor⇒
preset: disabled)
Active: active (running) since Wed 2023-03-29 07:37:14 UTC; 3s ago
Main PID: 122155 (node)
Tasks: 11 (limit: 190191)
Memory: 108.4M
CGroup: /system.slice/opensearch-dashboards.service
```

Verifying that the OpenSearch Dashboards Service Starts Automatically

After you install the OpenSearch Dashboards service and verify the installation, test to make sure the service starts automatically after you reboot the Linux server.

1. Reboot the Linux server.
2. Verify that the service has come up automatically.

```
systemctl status opensearch-dashboards
```

This should give an output with the status "active (running)," as shown in the following sample:

```
opensearch-dashboards.service - OpenSearch Dashboards
Loaded: loaded (/etc/systemd/system/opensearch-dashboards.service;
enabled; vendor⇒
preset: disabled)
```

```
Active: active (running) since Wed 2023-03-29 07:37:14 UTC; 3s ago
Main PID: 122155 (node)
Tasks: 11 (limit: 190191)
Memory: 108.4M
CGroup: /system.slice/opensearch-dashboards.service
```

Removing the OpenSearch Dashboards Service on Linux

To remove the OpenSearch Dashboards service:

1. Open a terminal window, running as root.
2. Change directory to OSK_INSTALL/setup:
`cd OSK_INSTALL/setup`
3. Run this command to remove the service:
`./psft-osd-service.sh --delete`
4. Use one of these methods to verify that the service was deleted:
 - The output of the following `ps` command should not include any OpenSearch Dashboards process:
`ps -ef | grep node`
 - Use the `systemctl` command:
`systemctl status opensearch-dashboards`

Troubleshooting OpenSearch Dashboards Configuration

This appendix describes how you can troubleshoot issues in the PeopleSoft implementation of OpenSearch Dashboards.

Insights Menu is not Displayed Under Reporting Tools

Access to the Insights menu is controlled through the Insights Administrator role. Therefore, only users with the Insights Administrator role can view the Insights menu and access OpenSearch Dashboards.

See [Accessing PeopleSoft Insights](#).

Errors on OpenSearch Dashboards Visualization Tiles

If you see the following errors on an OpenSearch Dashboards visualization tile, you should follow the instructions provided in the corresponding section to fix the issue:

- Access denied error message
- Internal error message
- Site not found error message
- Create new index pattern error message

Each of these errors and their solutions are described here:

Access Denied Error Message

If a user sees the Access Denied error message on an OpenSearch Dashboards visualization tile, follow these instructions to resolve the issue:

- As a first step, refresh the browser or clear the cache on the browser.
- Verify that the call back information on the Search Instance page is set correctly.
 1. After modifying the call back information, save the page.
 2. Select the Validate button to ensure that the validation returns a positive message.

See [Creating Search Instances](#).

- Verify that the `orcl_es_auth` index exists in OpenSearch.

Internal Error Message

If a user sees the Internal Error message on an OpenSearch Dashboards visualization tile, follow these instructions to resolve the issue:

- Verify that the search definition associated with the tile is deployed and indexed.
- Verify that the dashboard is deployed.

See [Managing a Delivered Dashboard](#).

Site Not Found Error Message

If a user sees the Site Not Found error message on an OpenSearch Dashboards visualization tile, follow these instructions to resolve the issue:

- Verify whether the OpenSearch Dashboards server is down.
- Verify whether OpenSearch Dashboards is configured correctly.

If the environment is SSL enabled, ensure that end to end SSL configuration is successful. However, it is advisable to verify the OpenSearch Dashboards configuration in a non-SSL environment first before configuring OpenSearch Dashboards in an SSL enabled environment.

Create New Index Pattern Error Message

If a user sees the Create New Index Pattern error message on an OpenSearch Dashboards visualization tile, follow these instructions to resolve the issue:

- Verify that the dashboards are deployed.
- Verify whether an index pattern is specified as default on the Management page in OpenSearch Dashboards.

See [Creating a Visualization](#).

Certificate Error When Launching OpenSearch Dashboards Visualization Tiles in the Chrome Browser

The certificate error is displayed because the subject alternate name (SAN) attribute is missing in the SSL certificate of OpenSearch and OpenSearch Dashboards. You should add the SAN attribute when setting up the keystore and private key and when you create the certificate signing request.

Example of SAN attribute: -ext SAN=dns:<domain_name>. Note that <domain_name> should be the exact host name.

The SAN attribute should be included in the script as shown in the following examples:

OpenSearch SSL Certificate

Set up keystore and private key:

```
keytool -genkey -alias node_alias -keystore OS_HOME/config/keystore/  
mykeystore.jks -keyalg RSA -keysize 2048 -validity 90 -ext  
SAN=dns:<domain_name>
```

Create Certificate Signing request (CSR):

```
keytool -certreq -alias node_alias -keystore OS_HOME/config/keystore/  
mykeystore.jks -file /home/certs/mycsr.csr -keyalg rsa -ext  
SAN=dns:<domain_name>
```

OpenSearch Dashboards SSL Certificate

Set up keystore and private key:

```
keytool -genkey -alias alias1 -keystore OSD_HOME/bin/mykeystore.jks -keyalg  
RSA -keysize 2048 -validity 712 -ext SAN=dns:<domain_name>
```

Create Certificate Signing request:

```
keytool -certreq -alias alias1 -keystore OSD_HOME/bin/mykeystore.jks -file  
D:\ca\mycsr.csr -keyalg rsa -ext SAN=dns:<domain_name>
```

Related Topics

- [Configuring SSL between PeopleSoft and Search Engine](#)
You can configure SSL connections between your PeopleSoft system and OpenSearch. When you have SSL configured, you then need to set the SSL Option field on the Search Instance Properties page to ENABLE.
- [Configuring SSL for OpenSearch Dashboards](#)
You can configure SSL for OpenSearch Dashboards. When you configure SSL for OpenSearch Dashboards, you need to set the SSL Option field (in the OpenSearch Dashboards section) on the Search Instance Properties page to ENABLE.

Unable to Save a Visualization

If you are creating a visualization and unable to save a visualization, you should ensure that you have either of the following privileges:

- The Search Administrator role is assigned to the user.
- The create access privilege is assigned to the user on the Insights Privileges page.

See [Specifying User Privileges](#).