



PeopleSoft Financials: The Search Feature PUM 51

Version Date: October 16, 2025

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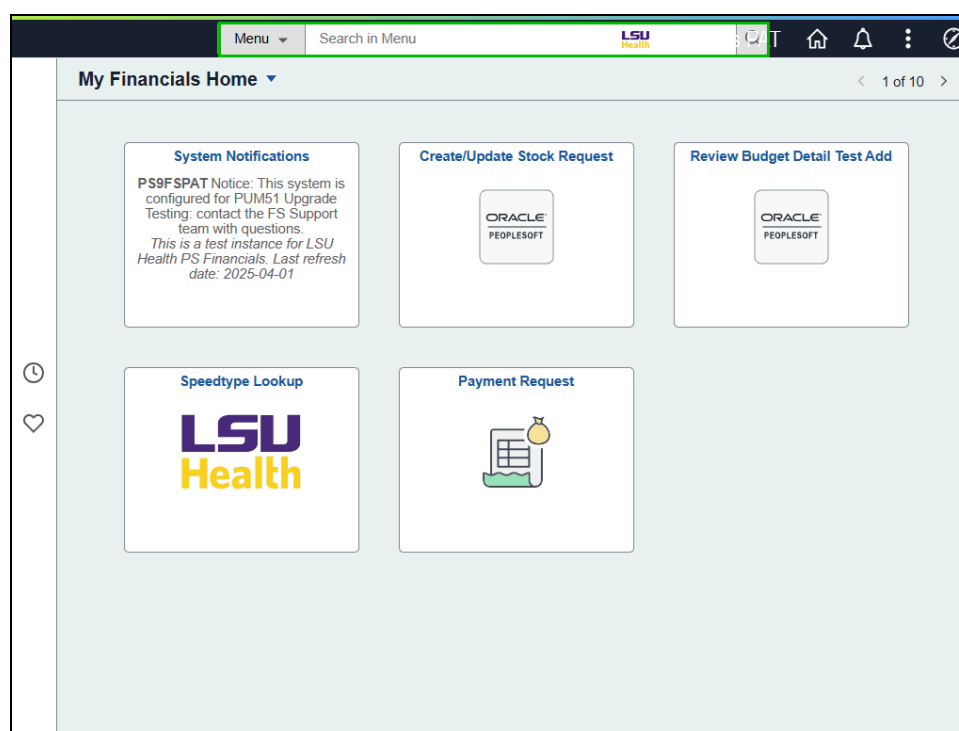
PeopleSoft Financials: The Search Feature PUM 51

The Search Feature

Procedure

in this topic you will learn how to use **The Search Feature**.

Step	Action
1.	PeopleSoft Financials users can <i>perform advanced, text-based searches</i> on the <i>data</i> in the application. The <i>purpose</i> of the PeopleSoft Search Feature allows users to: • Search for key words that enable users to find transactions and work with data without having to navigate using menus. • Refine results using facets. • Take direct action from search results. • Search deeper levels within the nested data. • Search for specific values and unstructured text across multiple data locations.

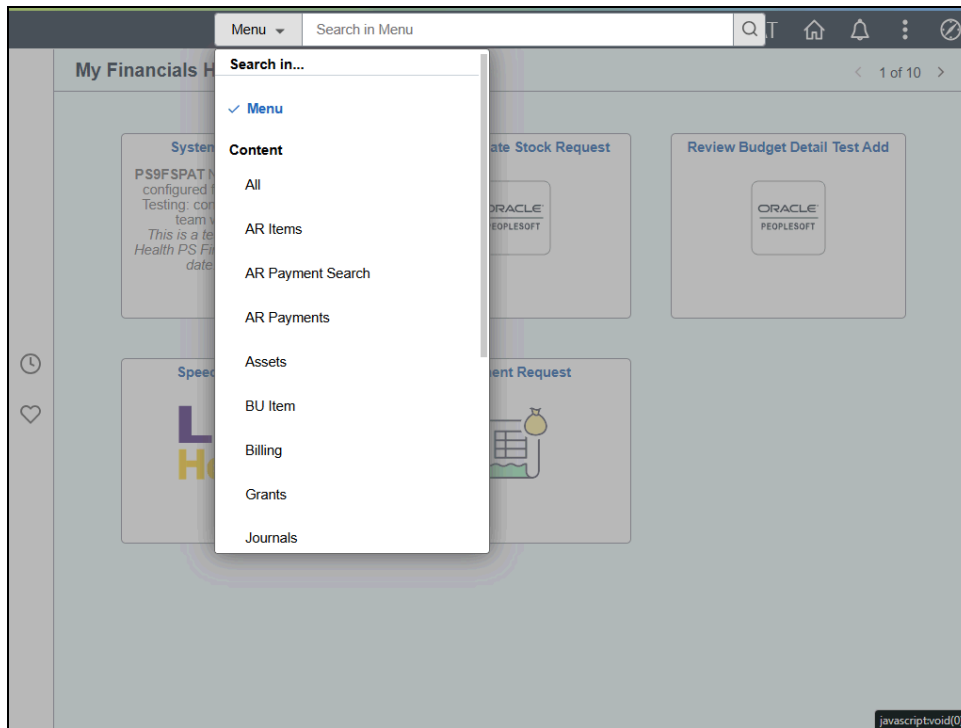


Step	Action
2.	The Search Feature is displayed at the top of all homepages as seen in this screenshot. <i>Searches</i> may be <i>performed</i> on the Menu and Content.

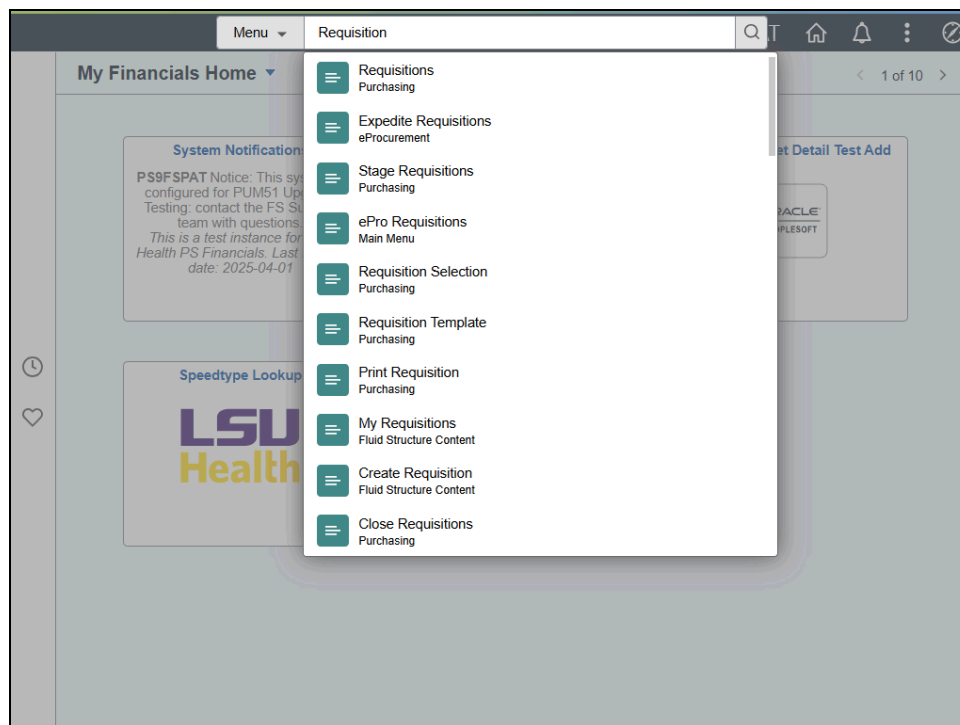
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Step	Action
3.	PeopleSoft Financials prior to the <i>Fall, 2025 upgrade</i> . Users were able to <i>search transactions</i> and/or <i>documents</i> in <i>Assets, Grants, Procurement Contracts</i> (rare), <i>Purchase Orders, Receipts</i> and <i>Requisitions</i> .



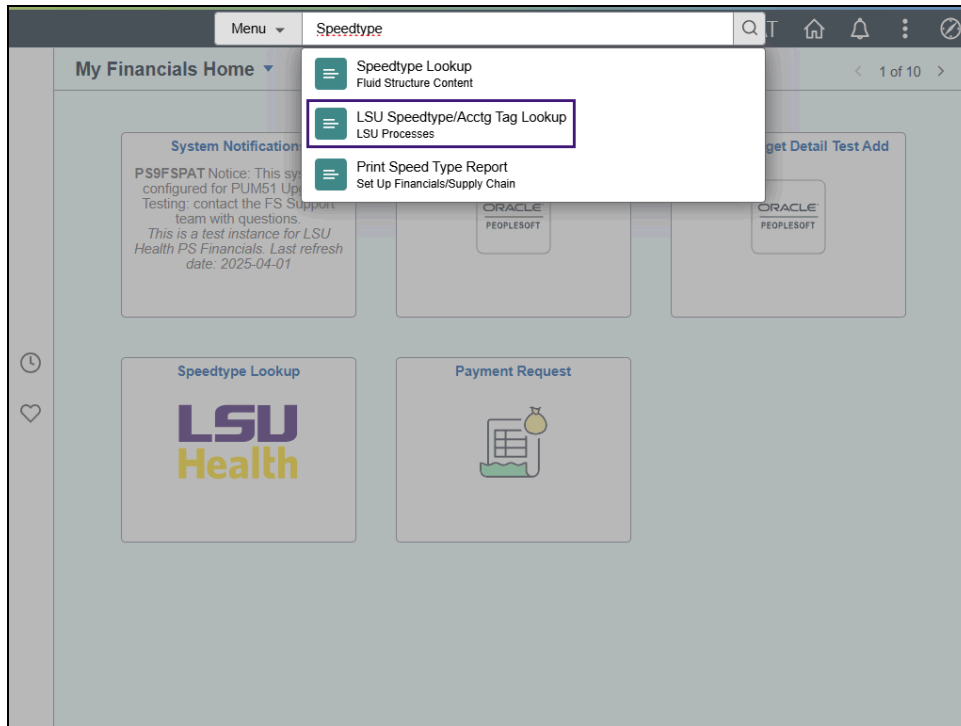
Step	Action
4.	Once the <i>upgrade occurs</i> in Fall, 2025, there will be <i>enhancements applied</i> that will allow users to also <i>search Journals, Suppliers, Business Unit Items</i> (Inventory only), <i>Billing Information, Accounts Receivable Items, and Payments</i> .
5.	Security for Searches <i>Search results</i> displayed from PeopleSoft Search Framework for Global Search are <i>based on the user's security access</i> (permission list) to the underlying component shown in the search results. Therefore, if a user does <u>not</u> have <i>access</i> to a <i>particular component</i>, then the user <i>will not see search results</i>. In addition, <i>row level security</i> is applied to <i>keyword search results</i> for <i>Search Pages</i> based on the <i>row level access for the user</i>. This means that <i>users will only see results for business units and/or setids</i> to which they have <i>access</i>.



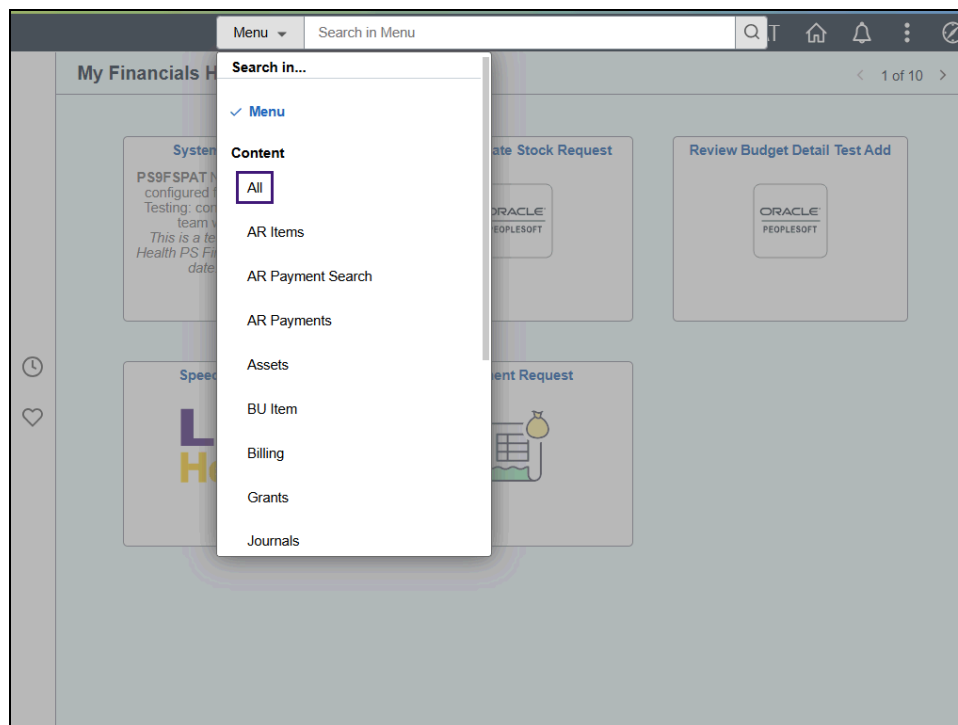
Step	Action
6.	Using the Search Feature - Menu or Content Menu - Users may <i>not know or remember</i> how to <i>navigate</i> and can use the <i>search feature</i> to help <i>guide</i> them there. Use the Menu option for the <i>search</i> and enter a <i>key word</i> such as "Requisition".
7.	Using the Search Feature - Menu or Content The <i>menu search</i> may help you <i>find</i> those <i>menu options</i> that you <i>rarely navigate to</i> or perhaps <i>cannot recall</i>. Selecting the <i>result</i> will <i>navigate the user</i> to the Create Requisition pages.

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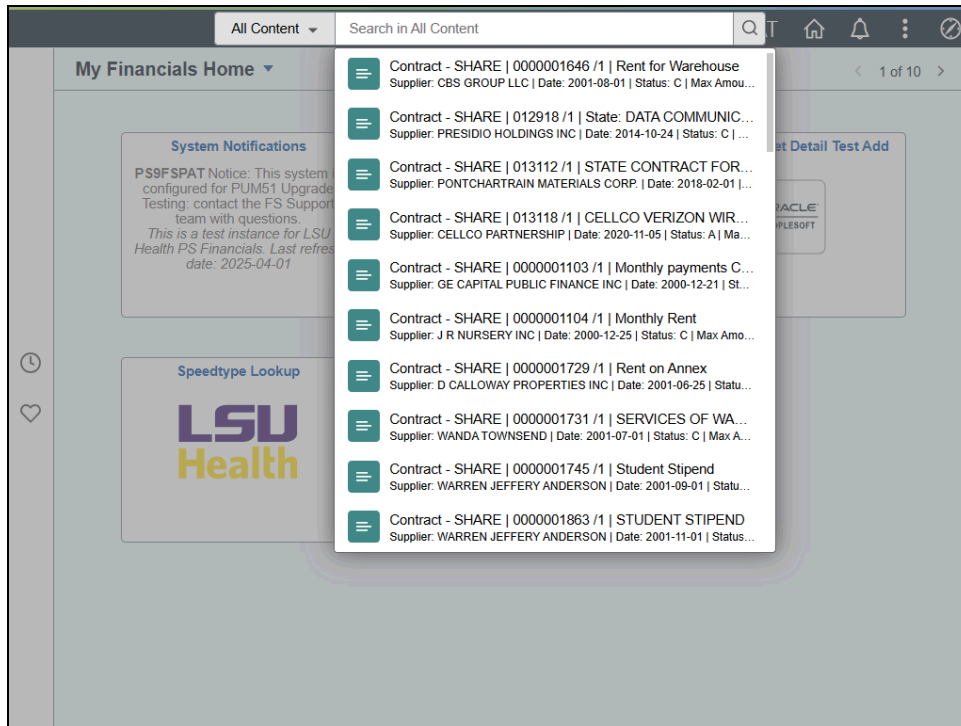
Step	Action
8.	Using the Search Feature - Menu or Content As a <i>second example</i> of the menu search, <i>type</i> in the word "Speedtype". Results display 3 options. <i>Select</i> the one that indicates <i>LSU Processes</i> to be navigated to the <i>Lookup</i> page.
9.	Using the Search Feature - Menu or Content The <i>LSU Speedtype/Acctg Tag Lookup</i> page displays.



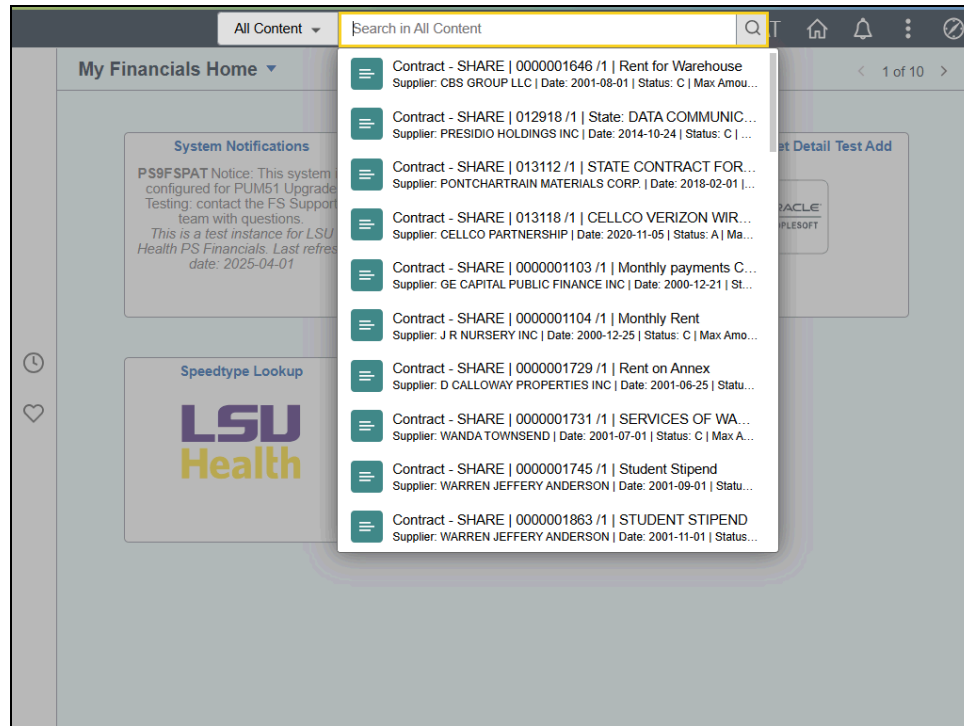
Step	Action
10.	Using the Search Feature - Menu or Content Content - To find any <i>information to a particular document or word</i>, users may choose to <i>search the Contents</i>. The user will <i>select the arrow next to the word Menu</i> and <i>change the setting to an option under Contents</i>. <i>Content searches may be limited further to a particular area, like Requisitions, AP Payments, Suppliers, etc.</i> But, if the user wants to <i>search for anything related to a particular word</i>, they <i>might choose 'All'</i>. For this example, "All" will be selected and the keyword entered will be a Project ID for LSUNO.

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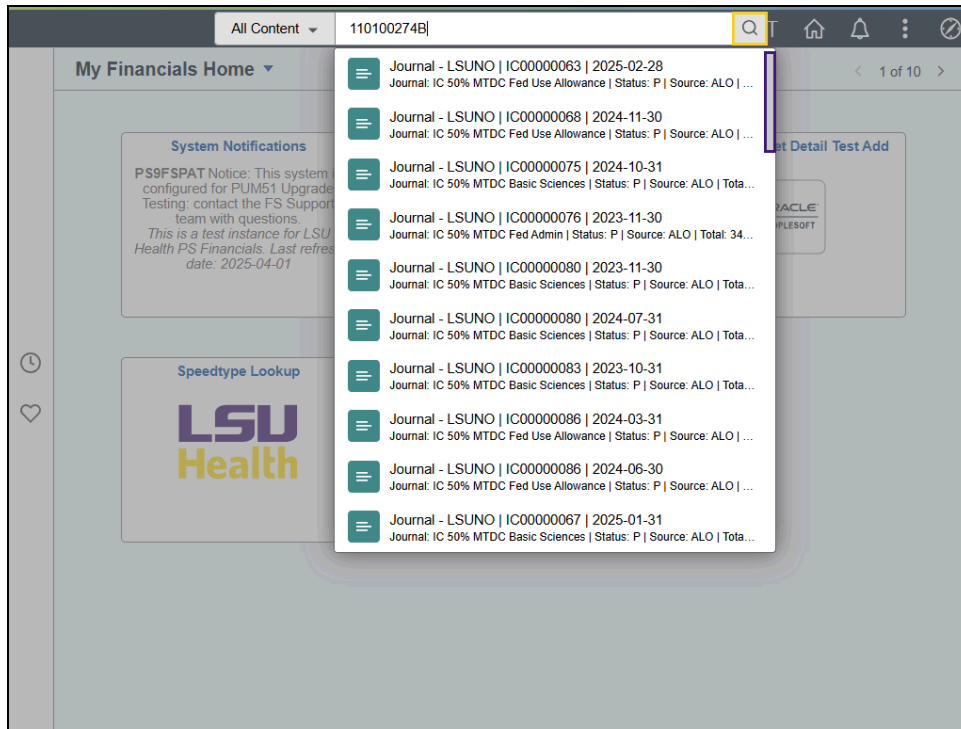
Step	Action
11.	Using the Search Feature - Menu or Content Notice that once you <i>select 'All'</i>, the system will begin to <i>display</i> data in <i>alpha order</i>.



Step	Action
12.	Enter the desired information into the Search in All Content field. Enter "110100274B" .

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Step	Action
13.	Data related to that project will be displayed. Notice the scrollbar to the right of the list. The scrollbar allows the user to view all the returned results. For this example, do not select one of the items on the list. Click the Search button. 

View Search Results

56 results for keyword: "110100274B"

56 rows

Journal - LSUNO IC00000080 2023-11-30	
Journal: IC 50% MTDC Basic Sciences Status: P Source: ALO Total: 7763.03 USD Lines: 16 Entered by: [REDACTED]	⌵
Journal - LSUNO IC00000083 2023-10-31	⌵
Journal: IC 50% MTDC Basic Sciences Status: P Source: ALO Total: 7064.78 USD Lines: 12 Entered by: [REDACTED]	⌵
Journal - LSUNO IC00000085 2023-09-30	⌵
Journal: IC 50% MTDC Basic Sciences Status: P Source: ALO Total: 2205.77 USD Lines: 4 Entered by: [REDACTED]	⌵
Journal - LSUNO IC00000075 2024-10-31	⌵
Journal: IC 50% MTDC Basic Sciences Status: P Source: ALO Total: 19293.25 US D Lines: 32 Entered by: [REDACTED]	⌵
Journal - LSUNO IC00000080 2024-07-31	⌵
Journal: IC 50% MTDC Basic Sciences Status: P Source: ALO Total: 13408.76 US D Lines: 32 Entered by: [REDACTED]	⌵
Journal - LSUNO IC00000067 2025-01-31	⌵
Journal: IC 50% MTDC Basic Sciences Status: P Source: ALO Total: 22383.75 US D Lines: 36 Entered by: [REDACTED]	⌵
Journal - LSUNO IC00000068 2025-02-28	⌵
Journal: IC 50% MTDC Basic Sciences Status: P Source: ALO Total: 22512.99 US D Lines: 36 Entered by: [REDACTED]	⌵
Journal - LSUNO IC00000081 2024-08-31	⌵
Journal: IC 50% MTDC Basic Sciences Status: P Source: ALO Total: 20097.08 US D Lines: 36 Entered by: [REDACTED]	⌵
Journal - LSUNO IC00000092 2024-03-31	⌵

Step	Action
14.	The Search results page displays. The <i>left side</i> of the page is the <i>navigational guide</i> . In this example, it <i>indicates the number of transactions by module</i> .

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View Search Results
56 results for keyword: "110100274B"

56 rows

Journal - LSUNO IC00000080 2023-11-30	Journal: IC 50% MTDC Basic Sciences Status: P Source: ALO Total: 7763.03 USD Lines: 16 Entered by: [REDACTED]	✓
Journal - LSUNO IC00000083 2023-10-31	Journal: IC 50% MTDC Basic Sciences Status: P Source: ALO Total: 7064.78 USD Lines: 12 Entered by: [REDACTED]	✓
Journal - LSUNO IC00000085 2023-09-30	Journal: IC 50% MTDC Basic Sciences Status: P Source: ALO Total: 2205.77 USD Lines: 4 Entered by: [REDACTED]	✓
Journal - LSUNO IC00000075 2024-10-31	Journal: IC 50% MTDC Basic Sciences Status: P Source: ALO Total: 19293.25 USD Lines: 32 Entered by: [REDACTED]	✓
Journal - LSUNO IC00000080 2024-07-31	Journal: IC 50% MTDC Basic Sciences Status: P Source: ALO Total: 13408.76 USD Lines: 32 Entered by: [REDACTED]	✓
Journal - LSUNO IC00000067 2025-01-31	Journal: IC 50% MTDC Basic Sciences Status: P Source: ALO Total: 22383.75 USD Lines: 36 Entered by: [REDACTED]	✓
Journal - LSUNO IC00000068 2025-02-28	Journal: IC 50% MTDC Basic Sciences Status: P Source: ALO Total: 22512.99 USD Lines: 36 Entered by: [REDACTED]	✓
Journal - LSUNO IC00000081 2024-08-31	Journal: IC 50% MTDC Basic Sciences Status: P Source: ALO Total: 20097.08 USD Lines: 36 Entered by: [REDACTED]	✓
Journal - LSUNO IC00000092 2024-03-31		✓

Step	Action
15.	The center of the page displays individual <i>transactions</i> meeting the search criteria. As shown here, there are <i>Journal transactions</i> , <i>one project</i> and <i>one award</i> transaction. Selecting the blue link navigates the user to the <i>transaction</i> .

[My Financials Home](#)

Search Results

Financials PAT

[Home](#)
[Search](#)
[Notifications](#)
[More](#)

New Search

Category

[Journals \(54\)](#)
[Projects \(1\)](#)
[Grants \(1\)](#)

View Search Results

56 results for keyword: "110100274B"

56 rows

Journal - LSUNO | IC00000080 | 2023-11-30

Journal: IC 50% MTDC Basic Sciences | Status: P | Source: ALO | Total: 7763.03 USD

| Lines: 16 | Entered by:

⌵

Journal - LSUNO | IC00000083 | 2023-10-31

Journal: IC 50% MTDC Basic Sciences | Status: P | Source: ALO | Total: 7064.78 USD

| Lines: 12 | Entered by:

⌵

Journal - LSUNO | IC00000085 | 2023-09-30

Journal: IC 50% MTDC Basic Sciences | Status: P | Source: ALO | Total: 2205.77 USD

| Lines: 4 | Entered by:

⌵

Journal - LSUNO | IC00000075 | 2024-10-31

Journal: IC 50% MTDC Basic Sciences | Status: P | Source: ALO | Total: 19293.25 USD

| Lines: 32 | Entered by:

⌵

Journal - LSUNO | IC00000080 | 2024-07-31

Journal: IC 50% MTDC Basic Sciences | Status: P | Source: ALO | Total: 13408.76 USD

| Lines: 32 | Entered by:

⌵

Journal - LSUNO | IC00000067 | 2025-01-31

Journal: IC 50% MTDC Basic Sciences | Status: P | Source: ALO | Total: 22383.75 USD

| Lines: 36 | Entered by:

⌵

Journal - LSUNO | IC00000068 | 2025-02-28

Journal: IC 50% MTDC Basic Sciences | Status: P | Source: ALO | Total: 22512.99 USD

| Lines: 36 | Entered by:

⌵

Journal - LSUNO | IC00000081 | 2024-08-31

Journal: IC 50% MTDC Basic Sciences | Status: P | Source: ALO | Total: 20097.08 USD

| Lines: 36 | Entered by:

⌵

Journal - LSUNO | IC00000092 | 2024-03-31

⌵

Step	Action
16.	Before selecting an entry, let's look at the <i>arrows displayed at the far right of each row</i>. This search resulted in 56 rows as noted at the top right of the list. On some, but <u>not all rows</u>, the user may see an arrow that allows the user access to certain related actions for the row. Not all rows will display an arrow. And, in some cases where the arrows do exist, user security may <u>not</u> allow you to select the related action.

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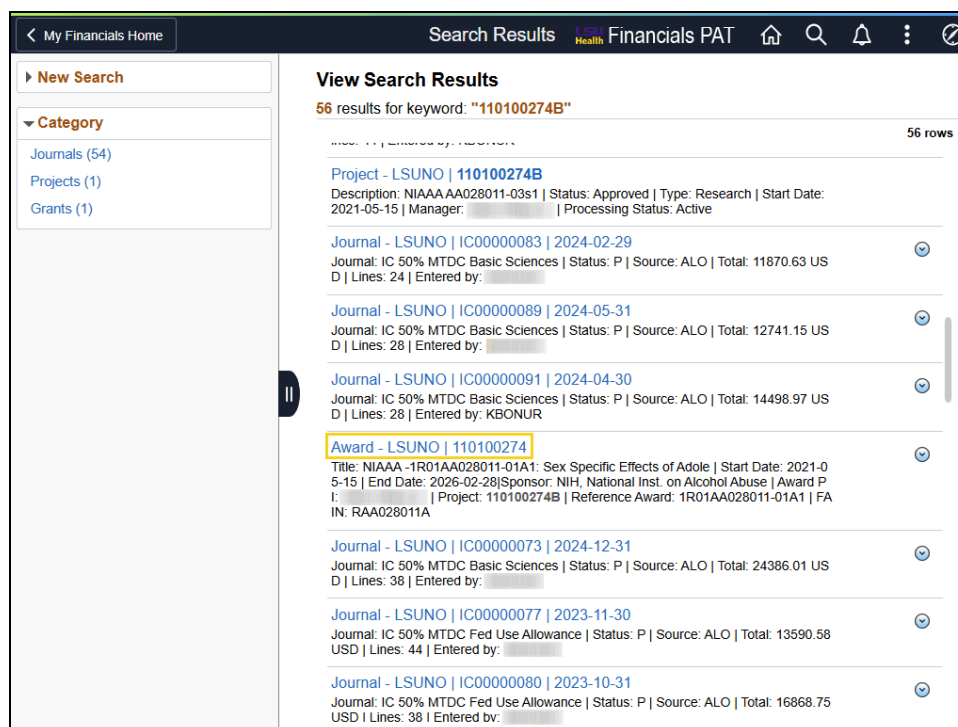
The screenshot displays the 'View Search Results' page for the keyword "110100274B". The left sidebar shows a 'Category' filter with 'Journals (54)', 'Projects (1)', and 'Grants (1)'. The main content area lists 56 results. The results are as follows:

- Journal - LSUNO | IC00000090 | 2023-12-31**
Journal: IC 50% MTDC Basic Sciences | Status: P | Source: ALO | Total: 12202.62 US D | Lines: 22 | Entered by: [redacted]
- Journal - LSUNO | IC00000092 | 2024-06-30**
Journal: IC 50% MTDC Basic Sciences | Status: P | Source: ALO | Total: 27017.49 US D | Lines: 30 | Entered by: [redacted]
- Journal - LSUNO | IC00000076 | 2023-11-30**
Journal: IC 50% MTDC Fed Admin | Status: P | Source: ALO | Total: 34364.72 USD | Lines: 44 | Entered by: [redacted]
- Project - LSUNO | 110100274B**
Description: NIAAA-AA028011-03s1 | Status: Approved | Type: Research | Start Date: 2021-05-15 | Manager: [redacted] | Processing Status: Active
- Journal - LSUNO | IC00000083 | 2024-02-29**
Journal: IC 50% MTDC Basic Sciences | Status: P | Source: ALO | Total: 11870.63 US D | Lines: 24 | Entered by: [redacted]
- Journal - LSUNO | IC00000089 | 2024-05-31**
Journal: IC 50% MTDC Basic Sciences | Status: P | Source: ALO | Total: 12741.15 US D | Lines: 28 | Entered by: [redacted]
- Journal - LSUNO | IC00000091 | 2024-04-30**
Journal: IC 50% MTDC Basic Sciences | Status: P | Source: ALO | Total: 12741.15 US D | Lines: 28 | Entered by: [redacted]
- Award - LSUNO | 110100274**
Title: NIAAA-1R01AA028011-01A1: Sex Specific Effects of Ad...
5-15 | End Date: 2026-02-28 | Sponsor: NIH, National Inst. on A...
I: [redacted] | Project: 110100274B | Reference Award: 1F...
IN: RAA028011A

An 'Actions' menu is open for the 'Award' row, showing the following options:

- Modify End Dates
- Contract General Information
- Contract Summary

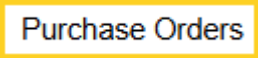
Step	Action
17.	Related Action Rows • Journal – If you were to select the arrow next to a journal row, you will see Related Action. However, selecting it will not allow the user to update the journal unless s/he is a member of the general accounting staff with access to these menu options. • Project – The row for project does not have an arrow, indicating no related actions are available. • Award – The Award row does include a related action arrow. Upon selection, you could review end dates or look at contract information. In this example, the user has security access to modify the end date. However, most users will only be able to view the end date.

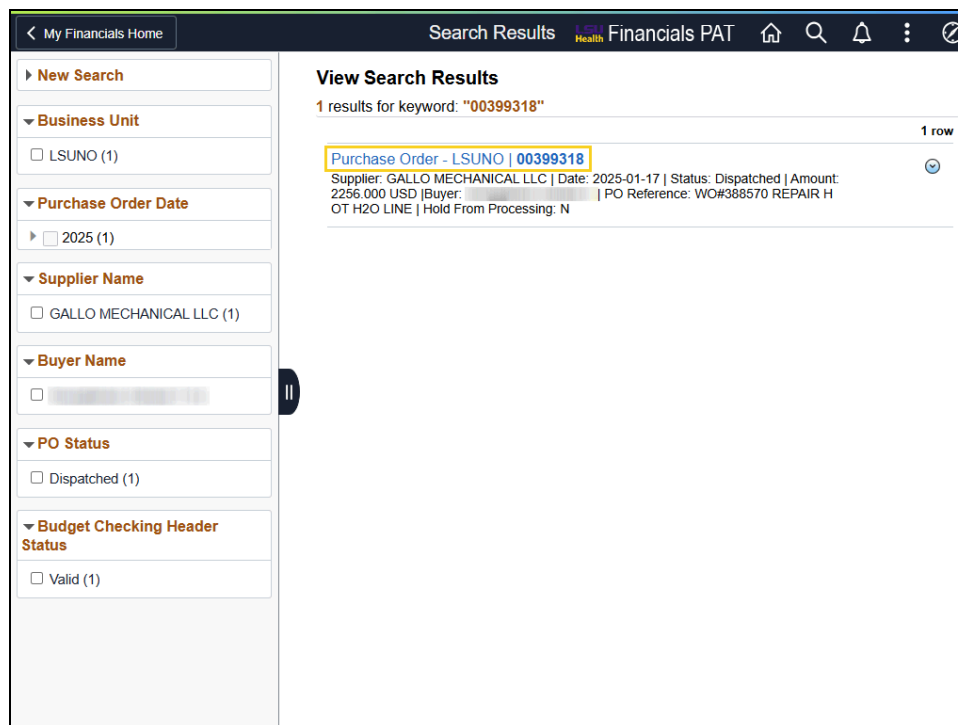


Step	Action
18.	Reviewing the Search Results Rows Instead of performing a related action, let's <i>review</i> the <i>Award</i>. The user may be interested in the <i>start and end dates</i>, a <i>full description</i>, <i>CFDA number</i> or <i>other related data</i>. Select the blue link for the Award. Click the Award - LSUNO 110100274 link. Award - LSUNO 110100274
19.	The user <i>navigates</i> to the Award pages. The <i>user</i> in this example <i>has security access</i> to <i>perform updates</i> on these pages, so the <i>view</i> is in <i>update mode</i>. <i>Update mode</i> is <i>indicated</i> because the <i>drop-down fields</i> and <i>magnifying glasses</i> are <i>active/usable</i>. <i>Most of the time</i>, end-users will be in <i>read-only</i> or <i>inquiry mode</i>. Click the Search Results button. < Search Results
20.	Click the New Search dropdown button to activate the menu. ▶
21.	In this example, the user will search using the Keyword field for 149761029. Enter the desired information into the Keyword field. Enter "149761029".

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Step	Action
22.	Click the Search button. 
23.	Four (4) result rows for LSUSH are retrieved. Select the top row result. Click the Award - LSUSH 149761029 link. 
24.	In this example, the user does <u>not</u> have <i>update access - no drop-down or magnifying glasses available</i> - to the Award, just <i>review access</i> .
25.	Content Search Example - Purchase Orders <i>One of the most common uses of Search is to find information about Purchase Orders. In the Search box, change the Menu setting to Purchase Orders. Use the scroll feature to locate the Purchase Order option.</i> Click the Down button of the scrollbar.
26.	Click the Purchase Orders list item. 
27.	Enter the desired information into the Search in Purchase Orders field. Enter " 00399318 ".
28.	<i>When you type in the PO #, one or more rows will list. You may click the row or select the magnifying glass to view the result row.</i> Click the Search (magnifying glass) button. 



Step	Action
29.	By selecting the <i>magnifying glass</i>, you are brought to the <i>Search Results</i> page shown here. <i>Additional information</i> regarding the PO is <i>displayed</i> on the <i>left side</i>. Had the user <i>selected</i> the <i>displayed row</i> instead of the magnifying glass, <i>this page</i> would have been <i>bypassed</i>. The system would have <i>defaulted</i> the user <i>onto</i> the <i>Purchase Order Inquiry</i> page. Click the Purchase Order - LSUNO 00399318 link. Purchase Order - LSUNO 00399318
30.	Once you are <i>on</i> the <i>PO Inquiry</i> page, you <i>may use</i> the <i>links</i> to <i>navigate</i> to <i>other PO pages</i> such as <i>Comments</i> or the <i>Document Status</i> page. In this example, <i>select</i> the <i>Document Status</i> link. Click the Document Status link. Document Status
31.	The <i>Document Status</i> page for this PO <i>shows</i> a <i>requisition</i> associated with it. <i>If</i> there were also <i>receipts</i> and <i>vouchers</i> and <i>payments</i>, the <i>icons</i> in the <i>visual</i> would <i>display in color</i> and the <i>documents</i> would be <i>listed</i>.

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Step	Action
32.	Example of Project Search If the user is a <i>Business Manager</i> and wants to <i>check information related to a project</i>, a <i>search</i> can be conducted <i>using the Project ID</i>. In this example, the user will <i>search for Project ID 149740424</i>. Enter the desired information into the Search in Projects field. Enter "149740424".
33.	Click the Search (magnifying glass) button. 
34.	The <i>results list thirteen (13) rows</i> that show multiple ids. Notice that on the <i>left side</i> where you can <i>see various facets of the projects</i>, you can <i>narrow it down to a particular year</i> or even by <i>project manager</i>. <i>Select a Project Manager to filter results</i>. Click the Moaven, Omeed option. 
35.	The two projects Omeed Moaven served as Project Manager are displayed.
36.	This completes <i>The Search Feature</i>. End of Procedure.