

# Secure Enterprise Search - SES

## PROCESS OVERVIEW

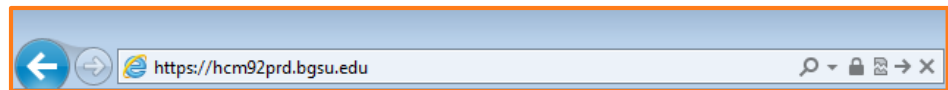
*Note: Please use Internet Explorer*

The purpose of this reference guide is to provide an overview of the newly enhanced feature, Secure Enterprise Search (SES). SES is a secure solution for searching BGSU data across all PeopleSoft applications. This document is set up according to the various tasks that may be performed when using the Secure Enterprise Search feature.

1. Open Internet Explorer
2. Type **HCM92prd.bgsu.edu** in the navigational bar
3. The HCM PeopleSoft sign-in page appears
4. Enter **Username** and **Password**
5. From the Home page, begin using the SES feature
6. Choose a Category to search on
7. Drill down to receive the proper data

## SECTION I NAVIGATION

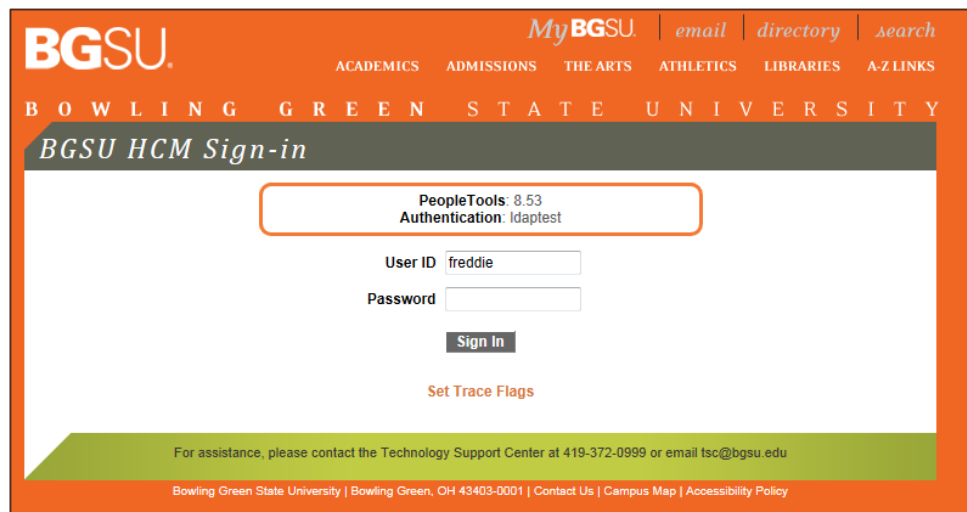
Begin the process by entering in the PeopleSoft HCM URL address.



### Step 1: Enter **USERNAME** and **PASSWORD**

*Note: These will be your BGSU network credentials.*

Step 1a: Click



## SECTION II ENTERPRISE SEARCH CATEGORIES

SES allows actions directly from search results based on the context without navigating through the menu to find what you are looking for.

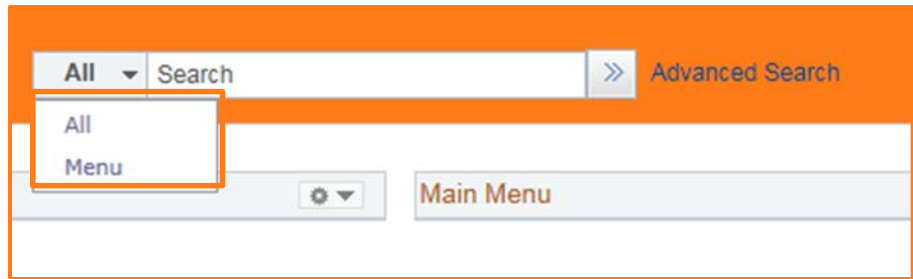
Your results are based on your roles and permissions within the PeopleSoft application.



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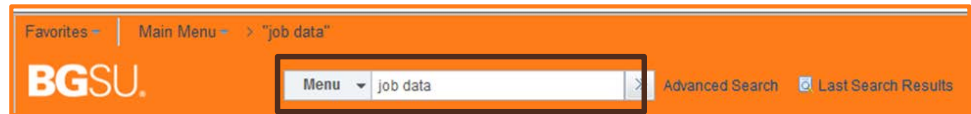
## Step 1: Choose a Category to perform a search

*Note: For our purposes we will be searching the Job Data tables.*



## Step 2: Category will populate

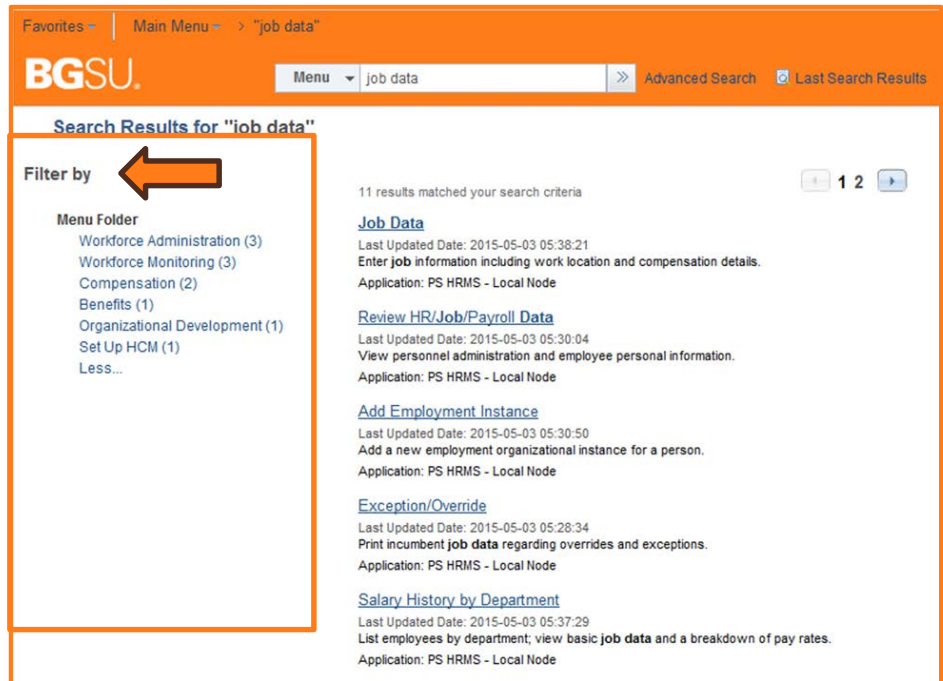
- Search will be performed against the Job Data history tables



## SECTION III SEARCH RESULTS

### Step 1: The search results will appear.

- The most relevant results will be sorted at the top.
- Facets (Filtered by) allow you to quickly find what you are looking for. The facets here have changed to reflect Job Data categories.
- You may refine your search several layers deep without going back to the search page by **clicking on the hyperlinks** under the facets.



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**Step 2:** Click the Facets category

- Refines the search even more.

Notice the Facets will change based on the filters that are currently applied.

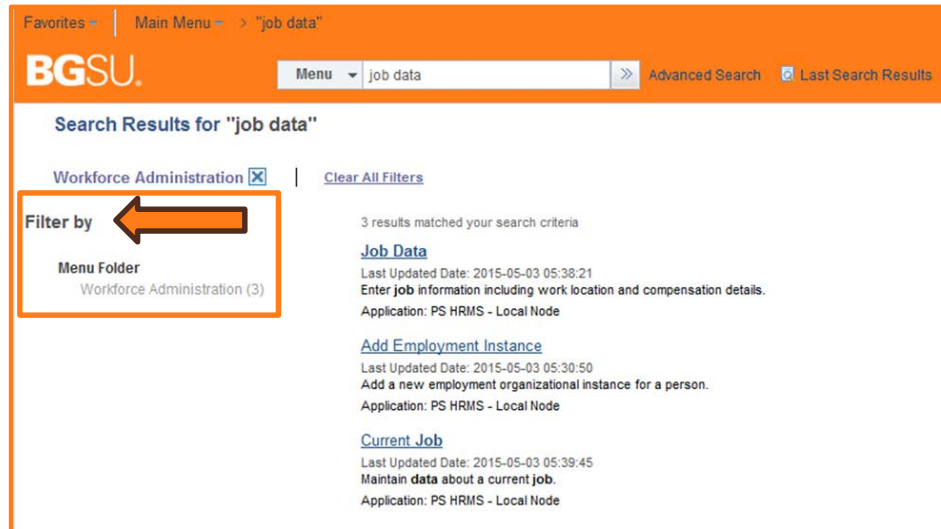
- If the information that has been searched on is not what is expected you may **Clear one Filter** or **Clear All Filters** to start the search again.

## Clearing Filters

- Click  to clear one filter and return to the **previous** search page.

*If you clear one filter and the other filters remaining do not apply, the system will remove all filters.*

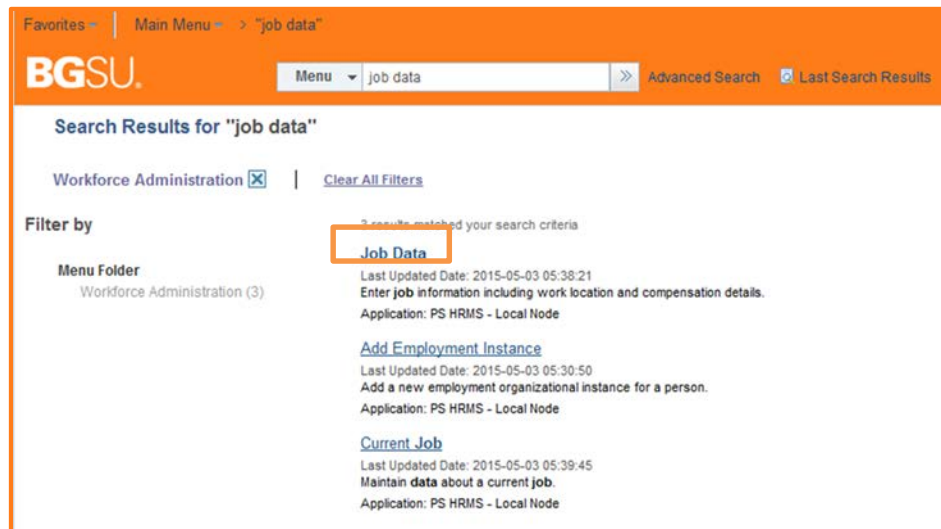
- Click  to return to the **original** search page.



The screenshot shows the BGSU search interface. At the top, there are navigation links for 'Favorites', 'Main Menu', and 'job data'. The search results are for 'job data'. A filter 'Workforce Administration' is applied, and a red box highlights the 'Filter by' section with an arrow pointing to the 'X' icon next to the filter name. The results list includes 'Job Data', 'Add Employment Instance', and 'Current Job'.

**Step 3:** Click 

You will be directed to the Job Data Search page



The screenshot shows the BGSU search interface. At the top, there are navigation links for 'Favorites', 'Main Menu', and 'job data'. The search results are for 'job data'. A filter 'Workforce Administration' is applied. The 'Job Data' link in the results list is highlighted with a red box.

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## Moving forward with the search results:

Job Data pages are now available.

You enter Search Criteria in order to find the Employee you wish to review.

### Step 4: Type the search criteria to choose the Employee you wish to review.

*Note: Data is refreshed nightly. Data entered today will not be updated until the next day.*

The screenshot shows the BGSU Job Data search page. At the top, there is a navigation bar with 'Favorites', 'Main Menu', and a breadcrumb trail '> "job data" > Job Data'. The BGSU logo is on the left, and a search bar with 'All' and 'Search' is on the right. Below the search bar, there are links for 'Advanced Search' and 'Last Search Results'. The main content area is titled 'Job Data' and contains the instruction: 'Enter any information you have and click Search. Leave fields blank for a list of all values.' There is a 'Find an Existing Value' button and a 'Search Criteria' dropdown menu. Below this, there are several search criteria fields: 'Empl ID:', 'Empl Record:', 'Name:', 'Last Name:', 'Second Last Name:', 'Alternate Character Name:', and 'Middle Name:'. Each field has a dropdown menu with 'begins with' selected and an input box. At the bottom, there are checkboxes for 'Include History', 'Correct History', and 'Case Sensitive'. There are also buttons for 'Search', 'Clear', 'Basic Search', and 'Save Search Criteria'.

### Step 5: If this is the incorrect employee, Click Last Search Results

This is an easy way to go back without running the search again or going back to the home page.

### Step 6: You are Directed to the previous search results.

Here you may choose other option to view.

The screenshot shows a window titled 'Last Search Results' with a close button in the top right corner. An arrow points to the title bar. The window content displays 'Search Results for "job data"' and a 'Refine Search' button. Below this, there are three search results:

- Job Data**  
Last Updated Date: 2015-05-03 05:38:21  
Enter **job** information including work location and compensation details.  
Application: PS HRMS - Local Node
- Add Employment Instance**  
Last Updated Date: 2015-05-03 05:30:50  
Add a new employment organizational instance for a person.  
Application: PS HRMS - Local Node
- Current Job**  
Last Updated Date: 2015-05-03 05:39:45  
Maintain **data** about a current **job**.  
Application: PS HRMS - Local Node

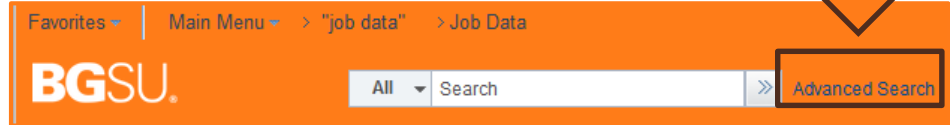
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## SECTION III ADVANCE SEARCH

Another way to perform a more limited search.

With advanced searches, you can further narrow your search, both by searching on multiple fields simultaneously and by using a variety of search operators.

**Step 1: Click Advanced Search**



The Search Criteria page opens

**Step 1: Enter Keywords into field(s)**

- Enter keywords to narrow down search results.

**Step 2: Click** 

If the data entered into the fields is incorrect,

**Click** 

This will clear out the Search Criteria in order for you to start over.

A screenshot of the 'Search Criteria' page in the BGSU system. The page has an orange header with the BGSU logo and navigation links. Below the header, there is a 'Search Criteria' section with a dropdown menu set to 'Menu'. A text input field contains the keyword 'job data', with a 'Search Tips' link to its right. Below this are several search criteria fields: 'With this Exact Phrase', 'With any of these Words', and 'Exclude'. There are also four dropdown menus for 'Portal Label', 'Long Description', 'Menu Folder', and 'Source Application', each with a 'contains phrase' option and an adjacent text input field. At the bottom of the search criteria section, there are two buttons: 'Search' and 'Clear'. A red box highlights these two buttons, with a red arrow pointing to the 'Search' button from the left and another red arrow pointing to the 'Clear' button from the right.

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**Step 3:** Search Results are listed.

You will notice that the same Search Results page appears based on the criteria you entered.

Here you may click on a hyperlink to take you into Job Data.

**You have successfully searched for data through the Secured Enterprise Search function.**

The screenshot displays the BGSU Secure Enterprise Search (SES) interface. At the top, there is a navigation bar with 'Favorites', 'Main Menu', and a search path '> "job data"'. The BGSU logo is on the left, and a search dropdown menu is set to 'All'. On the right, there are links for 'Advanced Search' and 'Last Search Results'. Below the navigation bar, a search criteria input field contains the text 'Search Criteria'. The main content area is titled 'Search Results' and shows '11 results matched your search criteria' with a pagination control for page 1 of 2. A 'Filter by' section on the left lists menu folders: 'Workforce Administration (3)', 'Workforce Monitoring (3)', 'Compensation (2)', 'Benefits (1)', 'Organizational Development (1)', and 'More...'. The search results list includes:

- [Job Data](#)  
Last Updated Date: 2015-05-03 05:38:21  
Enter **job** information including work location and compensation details.  
Application: PS HRMS - Local Node
- [Review HR/Job/Payroll Data](#)  
Last Updated Date: 2015-05-03 05:30:04  
View personnel administration and employee personal information.  
Application: PS HRMS - Local Node
- [Add Employment Instance](#)  
Last Updated Date: 2015-05-03 05:30:50  
Add a new employment organizational instance for a person.  
Application: PS HRMS - Local Node
- [Exception/Override](#)  
Last Updated Date: 2015-05-03 05:28:34  
Print incumbent **job data** regarding overrides and exceptions.  
Application: PS HRMS - Local Node