



# Infor PLM Accelerate 11

## Enterprise Search User Guide

### **Important Notices**

The material contained in this publication (including any supplementary information) constitutes and contains confidential and proprietary information of Infor.

By gaining access to the attached, you acknowledge and agree that the material (including any modification, translation or adaptation of the material) and all copyright, trade secrets and all other right, title and interest therein, are the sole property of Infor and that you shall not gain right, title or interest in the material (including any modification, translation or adaptation of the material) by virtue of your review thereof other than the non-exclusive right to use the material solely in connection with and the furtherance of your license and use of software made available to your company from Infor pursuant to a separate agreement, the terms of which separate agreement shall govern your use of this material and all supplemental related materials ("Purpose").

In addition, by accessing the enclosed material, you acknowledge and agree that you are required to maintain such material in strict confidence and that your use of such material is limited to the Purpose described above. Although Infor has taken due care to ensure that the material included in this publication is accurate and complete, Infor cannot warrant that the information contained in this publication is complete, does not contain typographical or other errors, or will meet your specific requirements. As such, Infor does not assume and hereby disclaims all liability, consequential or otherwise, for any loss or damage to any person or entity which is caused by or relates to errors or omissions in this publication (including any supplementary information), whether such errors or omissions result from negligence, accident or any other cause.

Without limitation, U.S. export control laws and other applicable export and import laws govern your use of this material and you will neither export or re-export, directly or indirectly, this material nor any related materials or supplemental information in violation of such laws, or use such materials for any purpose prohibited by such laws.

### **Trademark Acknowledgements**

The word and design marks set forth herein are trademarks and/or registered trademarks of Infor and/or related affiliates and subsidiaries. All rights reserved. All other company, product, trade or service names referenced may be registered trademarks or trademarks of their respective owners.

### **Publication Information**

Publication date: May 31, 2018

---

# Contents

- Intended audience ..... 4
- Related documents ..... 4
- Contacting Infor..... 4
- Chapter 1. Overview ..... 5
- Chapter 2. Use Case Overview ..... 6
  - Searching and Viewing..... 6
  - Filtering Search Results ..... 8
  - Searchable Items..... 10

---

## About this guide

This document provides information on how to use Enterprise Search.

## Intended audience

This guide is intended for system administrators. This document assumes that you have at least some knowledge in:

- System architecture and function for your Infor system
- SQL Server database

For the most up-to-date list of software and hardware requirements for Infor products, see the documentation for your system.

## Related documents

You can find the documents in the product documentation section of the Infor Xtreme Support portal, as described in the "Contacting Infor" section below.

## Contacting Infor

If you have questions about Infor products, go to the Infor Xtreme Support portal at [www.infor.com/inforxtreme](http://www.infor.com/inforxtreme).

If we update this document after the product release, we will post the new version on this Web site. We recommend that you check this Web site periodically for updated documentation.

If you have comments about Infor documentation, contact [documentation@infor.com](mailto:documentation@infor.com).

## Chapter 1. Overview

Enterprise Search now makes it even easier for users to quickly find information in PLM. It provides the ability to perform keyword / full text search across various Item Types such as Parts, Documents, ECOs, their Related Items and content in their associated Files at once. Users see results that they have access privileges to and can filter by properties to fine tune their search. Enterprise Search can be easily configured to include any custom Item Types, their Related Items, Files and properties

---

## Chapter 2. Use Case Overview

Enterprise Search allows users to search for items across multiple properties and ItemTypes. It checks the entered search keywords against properties such as Name, Item Number, and Description of ItemTypes such as Part, Document, and Customer. The Enterprise Search bar is accessible in the top right corner of the main menu.

### Searching and Viewing

1. In the main menu, click in Enterprise Search box, enter any keywords you are searching on, and click the orange search button.

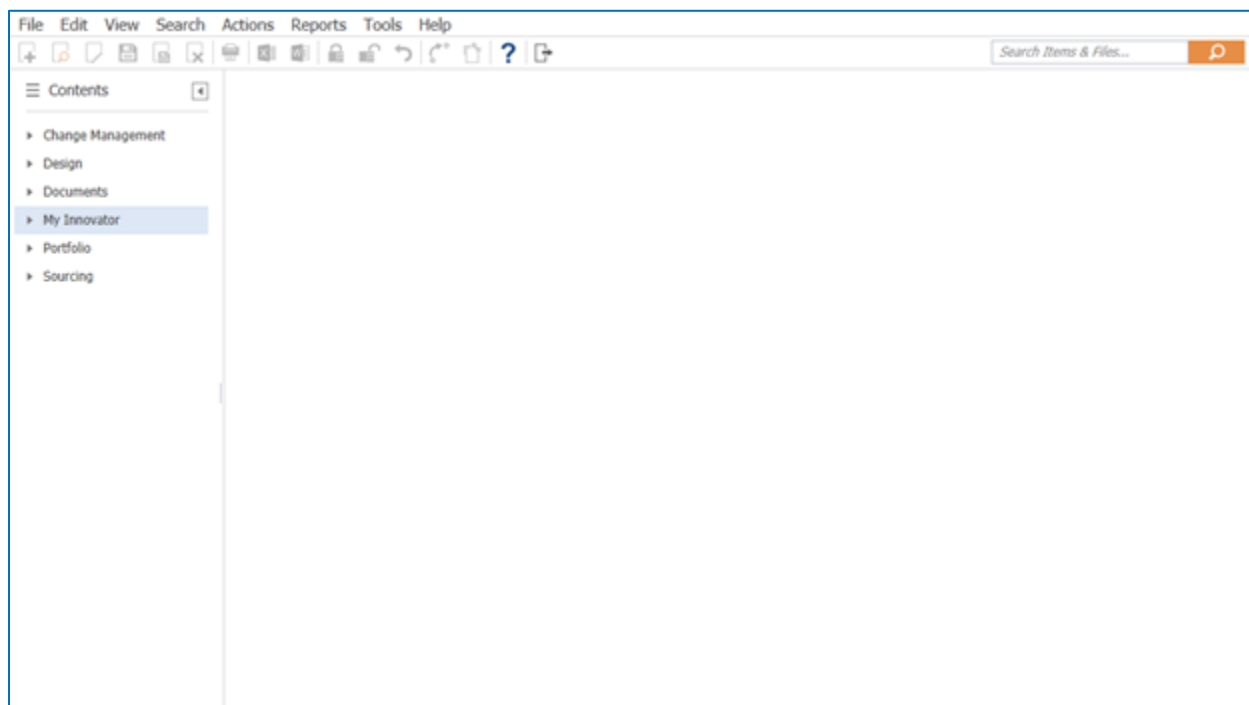


Figure 1.

3. The Enterprise Search will return results that contain the searched keywords.

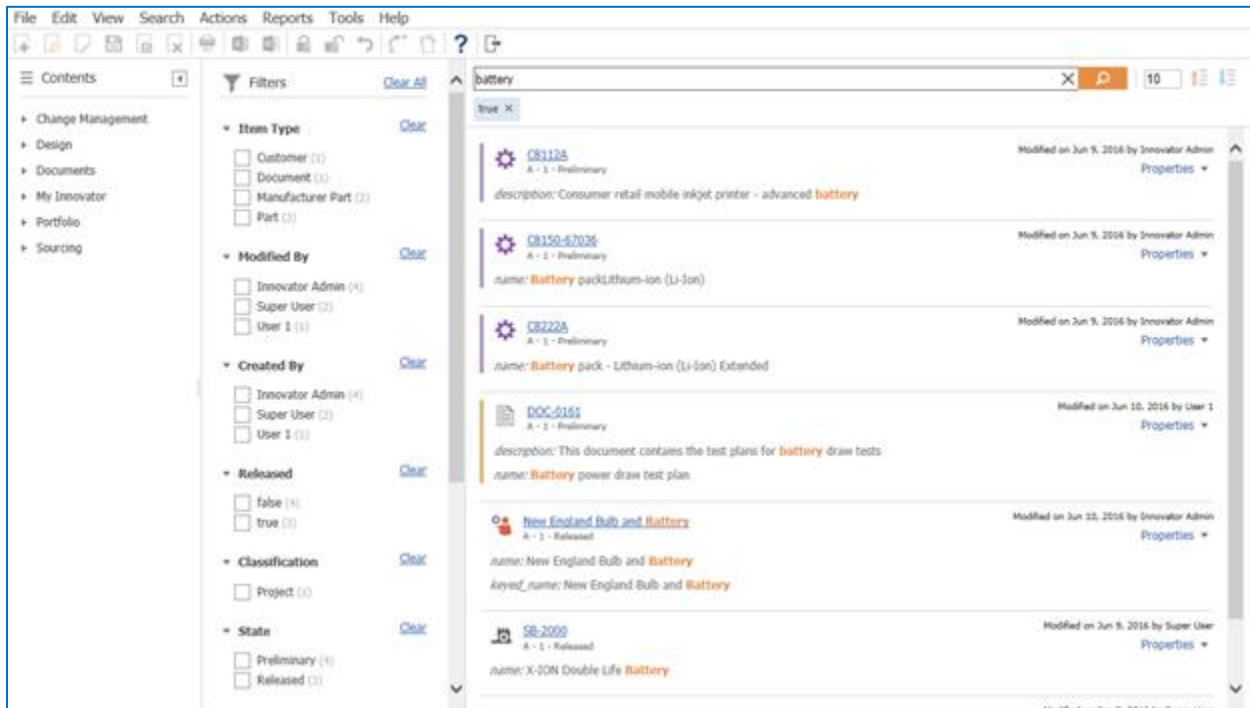


Figure 2.

4. Each result entry will show key characteristics of the item, which may include:
  - a. The ItemType icon
  - b. The item's Keyed Name
  - c. The current Revision, Generation, and State of the item
  - d. Last Modified On and Last Modified By information
  - e. The properties that match the searched keywords, which will be highlighted in bold orange

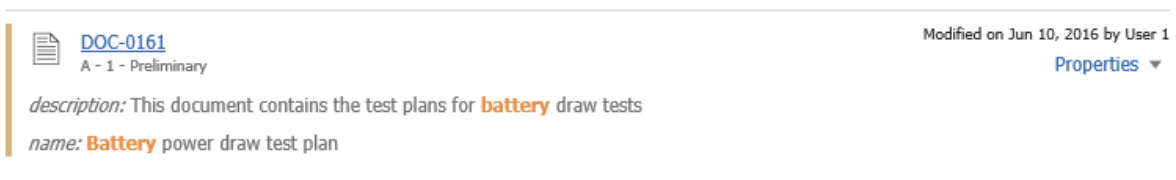


Figure 3.

5. Clicking on the Keyed Name will open the item in a new window.

## Filtering Search Results

1. The Filter menu allows a user to narrow the search results based on criteria such as ItemType, Modified By user, and State.
  - a. Some filter criteria, such as ItemType and Modified By, are applicable to any item

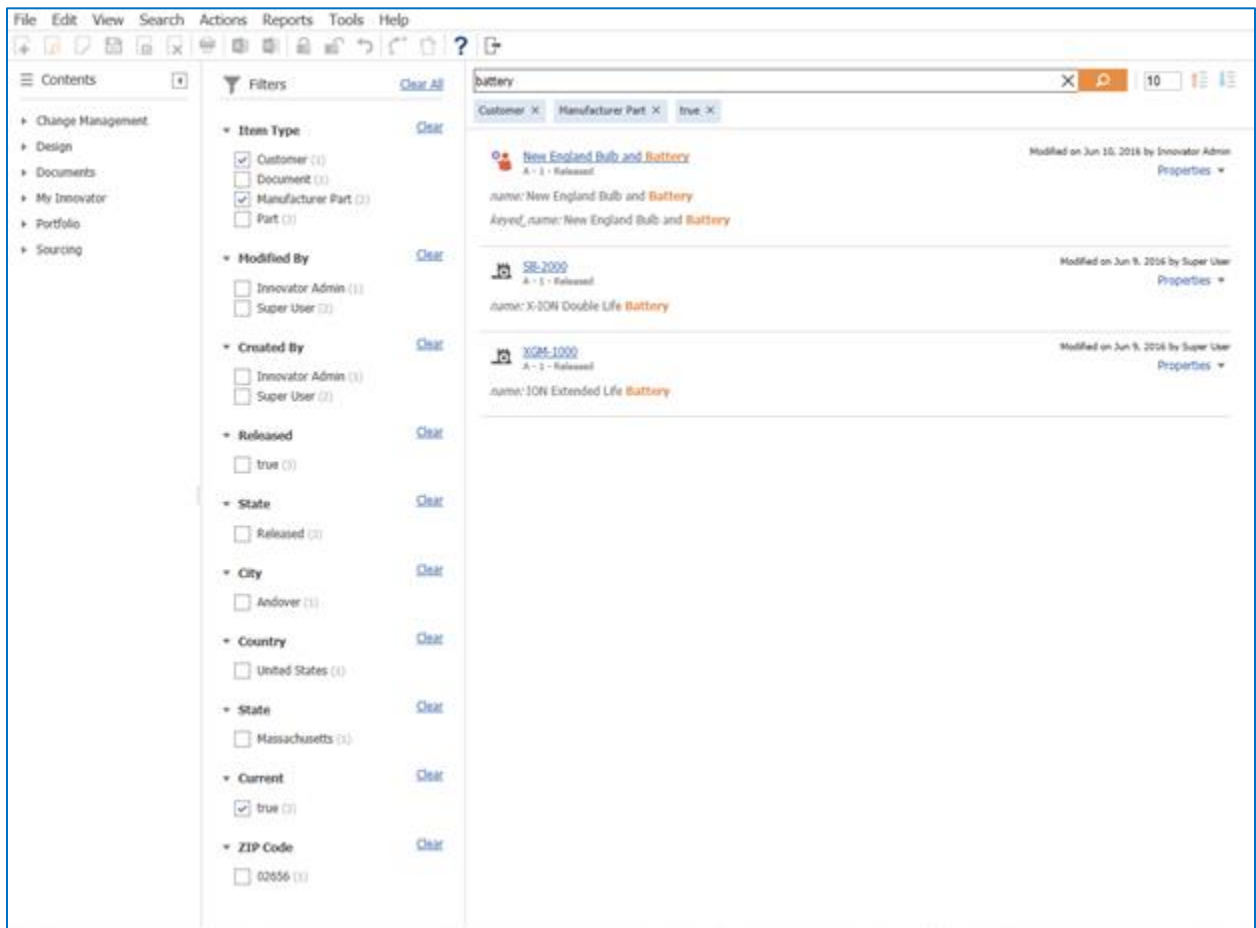


Figure 4.

- b. Some filter criteria are only applicable to certain ItemTypes. In this example, only the Customer ItemType has a Property for City. Enabling the filter on City will also filter out any ItemTypes that do not have that Property.



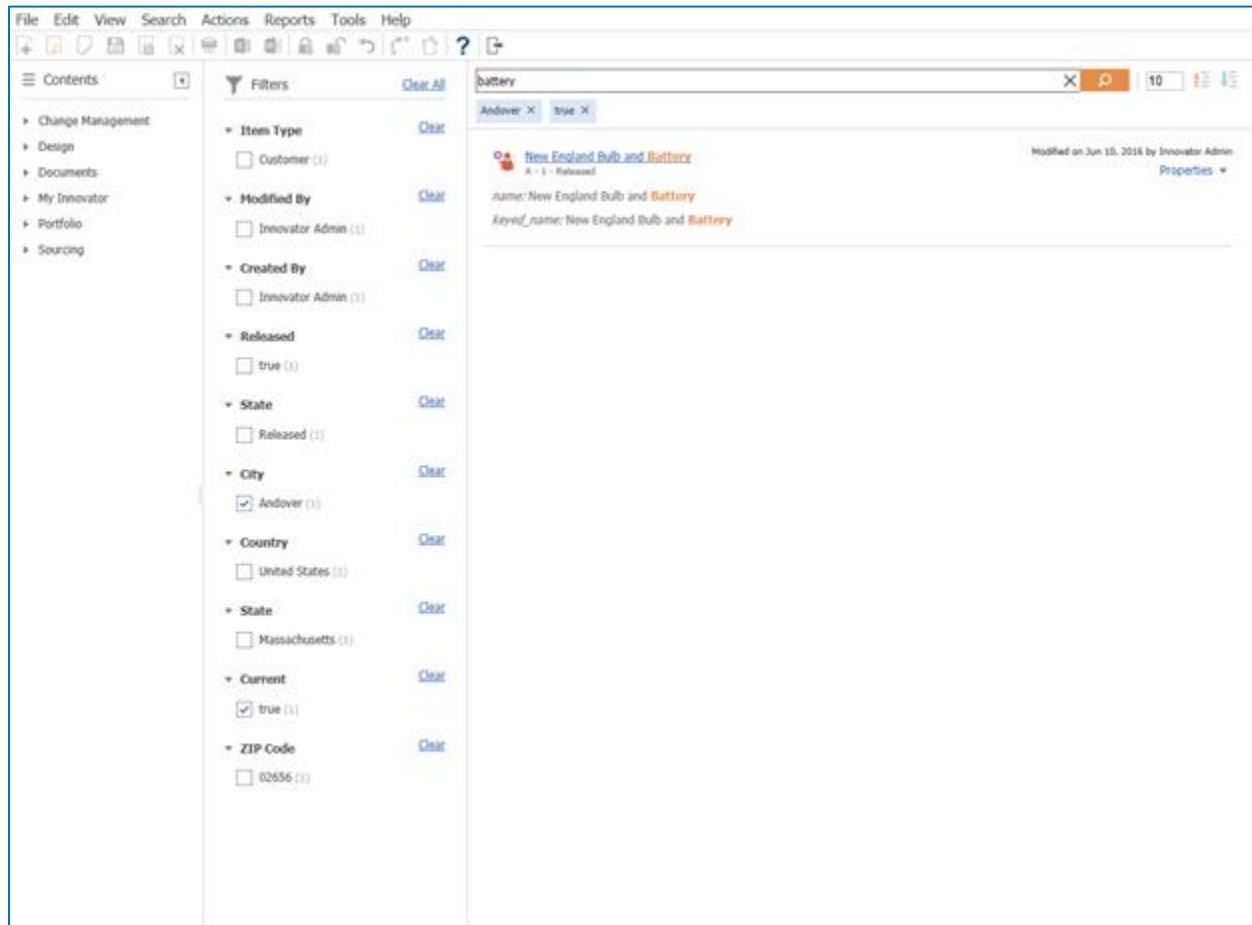


Figure 5.

- c. Filter options are only available if they are relevant to current results. In this example, filtering for only Documents removes the filter criteria that pertained to Customers (City, Zip Code, etc.)

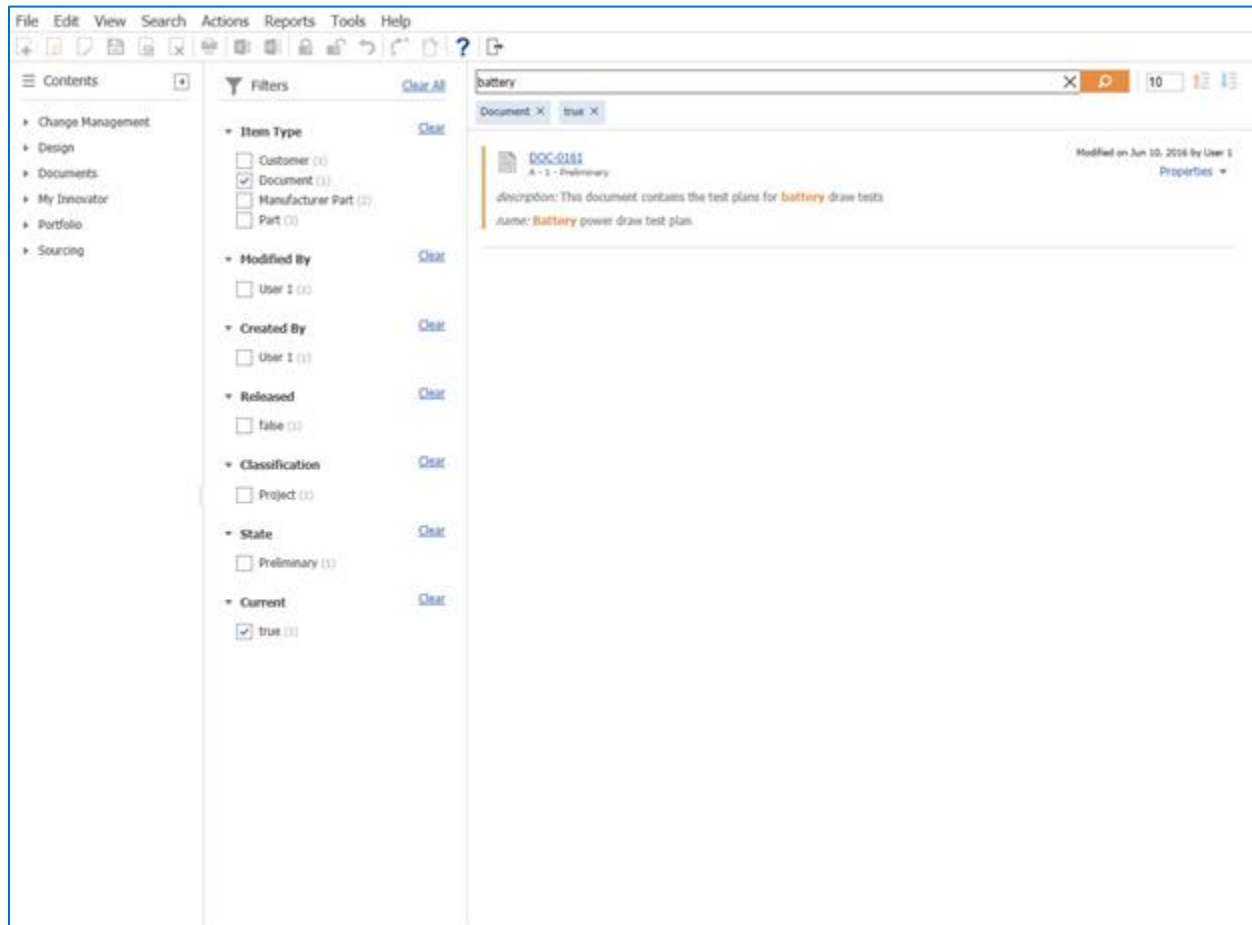


Figure 6.

## Searchable Items

By Default, the following ItemTypes are included in Enterprise Search results:

- Customer
- Document
- ECN
- ECR
- Express DCO
- Express ECO
- Manufacturer
- Manufacturer Part
- Part
- PR
- Product

- 
- Program
  - Project
  - Project Template
  - Simple ECO
  - Simple MCO
  - Vendor

Administrators are able to adjust which ItemTypes are included in Enterprise Search. A user will only see search results for ItemTypes which they have permission to view