

Search for processes and cases

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V9.2

Overview

Still not ready for review

(Search... feature...)

You can integrate Cora SeSequence with Elasticsearch to add search functionality to your Hot Operations solutions. Elasticsearch is an open-source, RESTful, distributed search and analytics engine.

Currently, only cloud implementations can integrate with Elasticsearch.

IT department should set up the ES cluster.

To integrate Elasticsearch with Cora SeSequence, you need to set up an Elasticsearch cluster. The cluster should include:

- Three zones for data and one Kibana instance to support fault tolerance.
- Memory:
 - Data RAM per node: 2 GB
 - For Elastic and Kibana:
 - Total memory: 9 GB
 - Total storage: 186 GB

Guy: es system requirements

Search functionality in the Flowtime site

When search is enabled, a Case Search item is added to the Flowtime menu. The Search feature is available only for systems with Hot Operations. Users can search for cases within a specific solution.

Users can enter free text to search for cases. Supported operators include:

- Quotation marks: to search for specific words or phrases
- Boolean operators (and, or, not)
- Wildcard (*)

Reference: <https://www.elastic.co/guide/en/elasticsearch/reference/current/sql-functions.html>

Search Results page

The search results are displayed in a grid. Users can filter and sort the columns to fine tune the retrieved results. The results grid includes three tabs:

- All: displays all the retrieved results.
- Open: displays the cases that have not been closed.
- Closed: displays the cases that have been closed.

The search-results grid is a regular grid, which you can configure as any other grid. It displays a

predefined number of results. If the user does not find what they need, the recommendation is to refine the search query.

Add Permissions -- get retrieved record, but it will open blank if you don't have permissions.