Search templates are a tool which provide Dean’s Office/Faculty Affairs Office staff in each school with the opportunity to pre-configure certain aspects of their school’s searches in the Faculty Recruiting System (FRS). This can be done for convenience’s sake, in cases where a school uses similar configurations for each and every search; in such cases, search templates will allow these configurations to be set once, and then reused for future searches. Search templates also give Dean’s Office/Faculty Affairs Office staff a granular level of control over their school’s searches; if there are any configurable options which they wish to set, and then lock from future editing, they can do so; this can be useful in cases where a particular configurable option in FRS needs to function the same way every time for a given school. Locking the field from editing will prevent department search administrators from undoing this setting; Dean’s Office/Faculty Affairs Office staff will always retain edit access, even to locked fields.

Upon logging in to FRS, users with access to create search templates will see a new menu option within their navigation bar. This section will show all existing search templates that the user has created, and is also the entry point to create a new search template.

Click the + sign to begin creating a new template.
Creating a Template

Name your template, and add some descriptive notes to help you and others in your school’s Dean’s Office/Faculty Affairs Office remember the purpose of this template.

*Search Administrator:* Department staff (e.g., BAS); only have access to their department’s searches

*Data Coordinator:* Dean’s Office/Faculty Affairs Office staff, with access to all searches in a school

Stats showing you which revision of a given template you are working on, how many searches are using this template, and how many searches are using this specific version.

You have control over which departments within your school have access to use this template. You may wish to create one template for certain departments, and another template for different departments, depending on how searches function within your school. Use this dropdown menu to determine which departments can use this template.
Any option within a search template can be “Forced” by clicking on the toggle shown above. This will prevent department search administrators from editing this option. Use this in cases where a particular configurable option must function in a certain way in your school or in this department; forcing this option will prevent search administrators from setting up this option incorrectly. You will be able to edit these fields within a search, but not the SAs.

In some cases, you can prevent search administrators from making additions to certain sections as well.

Recall that within a search in FRS, all search configuration is performed within the Settings area of the navigation bar, using the Search Overview, Search Committee, and Search options tabs. Those three tabs are reproduced here within the search templates section, and each contains the configurable options that would be found within the Settings section. Use these three tabs here to configure these options within your template. Once this template is applied to an actual search, it will configure these options as you have set them up here.
The members of a search committee will populate into FRS from myHR in one of three possible roles: Search Chair, Equity Rep, and Committee Member. Using this tab, you have the opportunity to pre-configure the permissions of those roles. The members of the search committee for any search to which you then apply this template will have their permissions set accordingly.

To change permissions, click on the role (it will highlight in blue), and then click the + sign.

When you are done setting any options you wish to configure on these three tabs, click Save Template.
The Search Options tab contains the remaining configurable options you can set as part of a template.
Once you finish and save a template, you will see it in your list of available templates on the Search Templates section of the navigation bar.

To make edits to an existing template, click the pencil icon.

You may have instances in which you wish to make two different templates that are very similar to each other (i.e., only a few configurable options are different between the two). In this case, you can save time by creating the first template, and then clicking this clipboard icon. This will create a copy of the template, to which you can make any necessary minor edits and re-save under a new title.
Using Automatic Templates

Recall that earlier, on page 2, you had the opportunity to define which departments in your school could use a particular template. This is a useful tool to exert some control of the departments’ use of templates, but you are still reliant on a department search administrator actually selecting that template for use (see page 8 for a screenshot of how they would do this). There may be cases where you wish to force an entire template upon a particular department or search, without giving the search administrator the option to opt out of using it. This can be done using Automatic Templates.

On this screen, you will see all departments in your school, combined with all possible myHR “Posting” job ranks at which a search can be run. You can use this screen to decide which department/job code combinations should have a particular template forced upon them. Perhaps you wish to force a certain template upon all searches (at all ranks) within a certain department in your school. You could use the Departments filter to select just that department, and leave the Job Ranks filter unfiltered. Or, perhaps you wish for all full Professor searches in your school to use a certain template. Set the Job Ranks filter to Professor, and leave the Departments filter unfiltered. (see additional instructions on next page)
Once you have set these filters, click the Template dropdown to the right of the department/job ranks combination(s) upon which you wish to force a certain template. Select the template you wish to force – this user is forcing a template called “Standard Rookie Search”.

If you have a large selection of department/job ranks to which you wish to force the same template, set the filters as described previously, and then use the filter and pencil icon to apply a template to all department/job ranks to which you are currently filtered.

Use this filter if you wish to see all department/job rank combinations upon which you have already forced a given template.

Setting an automatic template does not apply this template to any existing searches. Instead, it pre-sets the use of this template for any searches yet-to-be-created in the department/job rank combination(s) you have set. In the future, whenever a search using this department/job rank combination is generated in myHR and flows into FRS, it will automatically apply the given template, and all of that templates configuration options. Search Administrators are not able to opt out of this.
Applying a Template to a Search

Except in cases where you have used an Automatic Template (see pages 6-7), search templates do not automatically apply themselves to a search. Instead, the department search administrator (or you, if that works better for your school’s processes) must select which template to apply to any given search. Note that you do not need to use a template on a search – if you do not, the standard Default functionality of FRS will apply, and any configurable options can be set within that search as they normally would.

To apply a template, navigate within a search to the Settings tab, and click on the clipboard icon in the Search Details box.
Use the modal window that pops up to apply a particular template, and click Apply.

Note: As Dean’s Office/Faculty Affairs Office staff, you can also take this opportunity to force a template upon this search (i.e., prevent department search administrators from undoing the template that you apply), even if you have not pre-set an Automatic Template. Search administrators will not see this option, only Dean’s Office/Faculty Affairs Office staff.