

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.



Templates allow you to save standardized search configurations and make them available to Search Administrators for use. You can make them available to specific departments or to the entire school / business unit. Templates can disable a Search Administrator's ability to alter any configurable options, or can be used to provide them with defaults tailored to their needs. Automatic Templates will allow you to have your saved templates automatically applied when MyHR sends a search to FRS.

Templates Automatic Templates

Search Templates +

Quick Search: Show 10 entries

Template Name	Notes	Number of Active Searches	Last Updated At	Active
No data available in table				

Previous Next

Click the + sign to begin creating a new template

Creating a Template

Templates allow you to save standardized search configurations and make them available to Search Administrators for use. You can make them available to specific departments or to the entire school / business unit. Templates can disable a Search Administrator's ability to alter any configurable options, or can be used to provide them with defaults tailored to their needs.

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Save Template

Template Information

Name, stats, last edited by, etc. A primer on forced/not forced.

Name*

Standard Senior Template

This will be how Search Admins identify your template

Notes

Notes for yourself & other Data Coordinators

Template Availability

Effective Date

Available To

- No Departments -

In some cases, you may wish to make templates for use by specific departments.

Revision

Searches Using Template

Searches Using this Version

1

0

0

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.

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Template Search Overview Search Committee Search Options Save Template

Search Details

Search Description/Instructions

Default

Forced

Default

Department Site Posting URL

Default

Second Degree

Search Administrators

Search administrators and those with administrative access may create/manage the search administrators under the search settings tab.

Note: the Search Committee Chair in MyHR will always be added as the Search Admin. This is necessary for the system to function.

Allow the Search Admins to add entries to this in the search.

+ Yes

NetID	Forced	↑↓
No data available in table		

Search Contacts

Listed below are the contacts for this search. There are two types of search contacts that may be created. One for general search contacts, and one that may be used specifically as a contact for reference writers.

Allow the Search Admins to add +

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.

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.

Templates allow you to save standardized search configurations and make them available to Search Administrators for use. You can make them available to specific departments or to the entire school / business unit. Templates can disable a Search Administrator's ability to alter any configurable options, or can be used to provide them with defaults tailored to their needs. Automatic Templates will allow you to have your saved templates automatically applied when MyHR sends a search to FRS.

Template Search Overview **Search Committee** Search Options

When you are done setting any options you wish to configure on these three tabs, click Save Template

Save Template

The MyHR Committee section is loaded from the initial search creation in E-Recruit and is read-only within FRS. You may configure the permissions for the three MyHR roles.

The general search committee section is where you may supplement the MyHR committee with addition committee members if needed.

MyHR Search Committee

Quick Search:

Role	Permissions	Show Disposition	Forced
Search Chair	Applications [View Only], Documents [View Only], References [View Only], Admin Notes [View Only], Review [No Access], All Reviews [View Only], Communications [View Only], Disposition Codes [View Only], Custom Tag [View Only]	All	No
Equity Rep.	Applications [View Only], Documents [View Only], References [View Only], Admin Notes [View Only], Review [No Access], All Reviews [View Only], Communications [View Only], Disposition Codes [View Only], Custom Tag [View Only]	All	No
Committee Member	Applications [View Only], Documents [View Only], References [View Only], Admin Notes [View Only], Review [No Access], All Reviews [View Only], Communications [View Only], Disposition Codes [View Only], Custom Tag [View Only]	All	No

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.

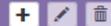
Templates allow you to save standardized search configurations and make them available to Search Administrators for use. You can make them available to specific departments or to the entire school / business unit. Templates can disable a Search Administrator's ability to alter any configurable options, or can be used to provide them with defaults tailored to their needs.

Automatic Templates will allow you to have your saved templates automatically applied when MyH

The Search Options tab contains the remaining configurable options you can set as part of a template

Save Template

Degree Types



Add the degree types you'd like to include in your search. You may drag and drop to change your display order by clicking and dragging an item's display order.

Allow the Search Admins to add entries to this in the search.

+ Yes

Degree Type	Display Order	Forced
Degree Not Listed - [DNL]	1	No

Document Type



Add the document types you'd like to include in your search. Specify the maximum document size for your document and whether or not it is a required document. You may drag and drop to change your display order by clicking and dragging an item's display order.

If a document type you need is missing from the list please contact facultyrecords@northwestern.edu to request its addition.

Allow the Search Admins to add entries to this in the search.

+ Yes

Document Type	Max Size	Required?	Display Order	Forced
Curriculum Vitae	8	Y	1	Yes
Graduate Transcripts	4	Y	1	Yes

Reference Types



Add the reference types you'd like to include in your search. You may drag and drop to change your display order by clicking and dragging an item's display order.

If a reference type you need is missing from the list please contact facultyrecords@northwestern.edu to request its addition.

Allow the Search Admins to add entries to this in the search.

+ Yes

Reference Type	Display Order	Forced
Other	1	No

Ad Source Types



Add the advertising sources you'd like to include in your search. **This is an optional field and not required for you search.** You may drag and drop to change your display order by clicking and dragging an item's display order.

If an ad source type you need is missing from the list please contact facultyrecords@northwestern.edu to request its addition.

Allow the Search Admins to add entries to this in the search.

+ Yes

Ad Source Type	Display Order	Forced
No data available in table		

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Search Templates

Quick Search: Show entries

Template Name	Notes	Number of Active Searches	Last Updated At	Active	
		2	2018-07-10 13:54:14	Yes	 

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.

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Dashboard Search Templates

Templates allow you to save standardized search configurations and make them available to Search Administrators for use. You can make them available to specific departments or to the entire school / business unit. Templates can disable a Search Administrator's ability to alter any configurable options, or can be used to provide them with defaults tailored to their needs.

Automatic Templates will allow you to have your saved templates automatically applied when MyHR sends a search to FRS.

Templates Automatic Templates

Automatic Templates

You can automatically apply your templates to new searches as they come in from MyHR. You can use different templates for different job ranks in the same department. Search Administrators will not be able to switch to another template if you have chosen to automatically apply a custom template to their search.

You can set up which dept/job rank combinations use which template one-by-one, or use the filters on the left to select your desired grouping, then pick a template on the right to apply it to all of them.

- Filter Departments - ▾

- Filter Job Ranks - ▾

- Filter Templates - ▾

System Default ▾



Department	Job Rank	Template
Allen Center Building Oper	Assistant/Assoc Prof (Posting)	System Default ▾
Allen Center Building Oper	Assoc Dean (Posting)	System Default ▾

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)

Templates allow you to save standardized search configurations and make them available to Search Administrators for use. You can make them available to specific departments or to the entire school / business unit. Templates can disable a Search Administrator's ability to alter any configurable options, or can be used to provide them with defaults tailored to their needs.

Automatic Templates will allow you to

Templates Automatic Temp

Automatic Templates

You can automatically apply your templates to new searches as they come in from MyHR. You can use different templates for different job ranks in the same department. Search Administrators will not be able to switch to another template if you have chosen to automatically apply a custom template to their search.

You can set up which dept/job rank combinations use which template one-by-one, or use the filters on the left to select your desired grouping, then pick a template on the right to apply it to all of them.

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.

The screenshot shows the 'Automatic Templates' configuration page. At the top, there are three filter boxes: 'Kellogg Finance', '- Filter Job Ranks -', and '- Filter Templates -'. Below these is a table with columns for 'Department', 'Job Rank', and 'Template'. The table lists five rows, all with 'Kellogg Finance' in the Department column and various job ranks in the Job Rank column. The 'Template' column shows a dropdown menu for each row. The dropdown menu is open for the first row, showing 'System Default' and 'Standard Rookie Search' (which is selected). A pencil icon is visible next to the 'System Default' option in the dropdown. A callout box points to the '- Filter Templates -' filter, and another callout box points to the 'Standard Rookie Search' option in the dropdown menu.

Department	Job Rank	Template
Kellogg Finance	Assistant/Assoc Prof (Posting)	System Default
Kellogg Finance	Assoc Dean (Posting)	System Default
Kellogg Finance	Assoc Prof Clinical Non-Tenure	System Default
Kellogg Finance	Assoc Prof Non-Tenure(Posting)	System Default
Kellogg Finance	Assoc Prof/Director Non-Tenure	System Default

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.

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The screenshot displays the myHR Faculty Recruiting interface. At the top, a navigation bar includes links for Dashboard, Overview, Applications, Reporting, Communications, Settings, and Search Templates. The 'Settings' tab is highlighted with a red box. Below the navigation bar, the search title '(33677) TEST KELLOGG- Open Rank (Posting)' is shown with a 'Pre-Active' status. The 'Search Administration' section contains instructions and a list of configuration options. A red arrow points from the 'Settings' tab to a text box that reads: 'To apply a template, navigate within a search to the Settings tab, and click on the clipboard icon in the Search Details box'. Another red arrow points from this text box to the clipboard icon in the 'Search Details' section. The 'Search Details' section includes a description of the search settings and status, and a note about the Department Website URL. The 'Search Administrators' section lists the administrators assigned to the search.

Dashboard Overview Applications Reporting Communications **Settings** Search Templates

(33677) TEST KELLOGG- Open Rank (Posting) **Pre-Active**
[Kellogg School of Management - Kellogg Mgt and Organizations]

Search Administration

This section is where you configure all the search related configurations — detailed search settings, contacts, administrators, search committee, document types, document types, etc. to name a few.

- Configuration options, with the exception of search committee, will become read-only once the search becomes active.
- **The Data Coordinator is responsible for reviewing the search configuration settings/approval and activating the search.**
- In case you need to change any of the items while the search is in Active status, please contact your Data Coordinator to change the status to the Pre-Active. They will need to set the search back to Active status in order to receive applicants again once changes are made.
(Please take caution in making changes to configuration settings mid-search as it can cause data inconsistencies)

Search Overview Search Committee Search Options System Users My Groups

Search Details [Clipboard Icon] [Edit Icon]

A quick high-level reference to the basics of the search settings and status.

The Dept. Website URL is usually a departmental web page, or similar, that provides applicants with instructions and details on the position available. This should include details on the required documents, references, etc. in order to inform the applicant of the necessary information they will need to complete the application. This web page will usually contain a link to the application form.

Search Administrators [Add Icon]

Listed below are the search administrators assigned to this search. Additional search administrators may be created as needed. Search administrators are those that manage the details of the search. They are responsible for setting the search options, creating the search committee (adding/removing search committee members), along with the basic search configurations.

(33677) TEST KELLOGG- Open Rank (Posting)
[Kellogg School of Management - Kellogg Mgt and Organizations]

Search Administration

This section is where you configure all the search related configurations — details

- Configuration options, with the exception of search committee, will become
- **The Data Coordinator is responsible for reviewing the search configuration**
- In case you need to change any of the items while the search is in Active status, they will need to set the search back to Active status in order to receive the new configuration. *(Please take caution in making changes to configuration settings m*

Search Overview Search Committee Search Options System Configuration

Search Details

A quick high-level reference to the basics of the search settings and status.

The Dept. Website URL is usually a departmental web page, or similar, that provides applicants with instructions and details on the position available. This should include details on the required documents, references, etc. in order to inform the applicant of the necessary information they will need to complete the application. This web page will usually contain a link to the application form.

Apply a Template

This will revert all settings to default, and then apply the new template. You will lose all current configurable options, including the search description & contacts.

Template

Default FRS Search ▾

Force Template

No, the SA/SCM may change to another applicable template ▾

Close Apply

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.