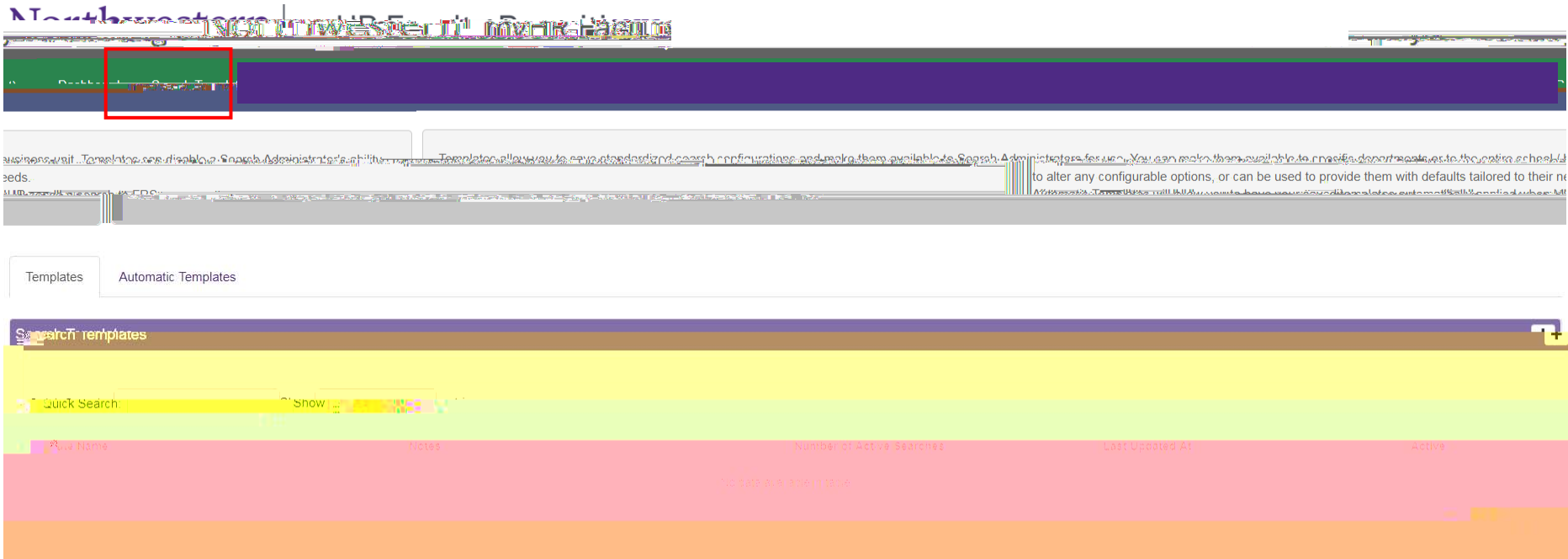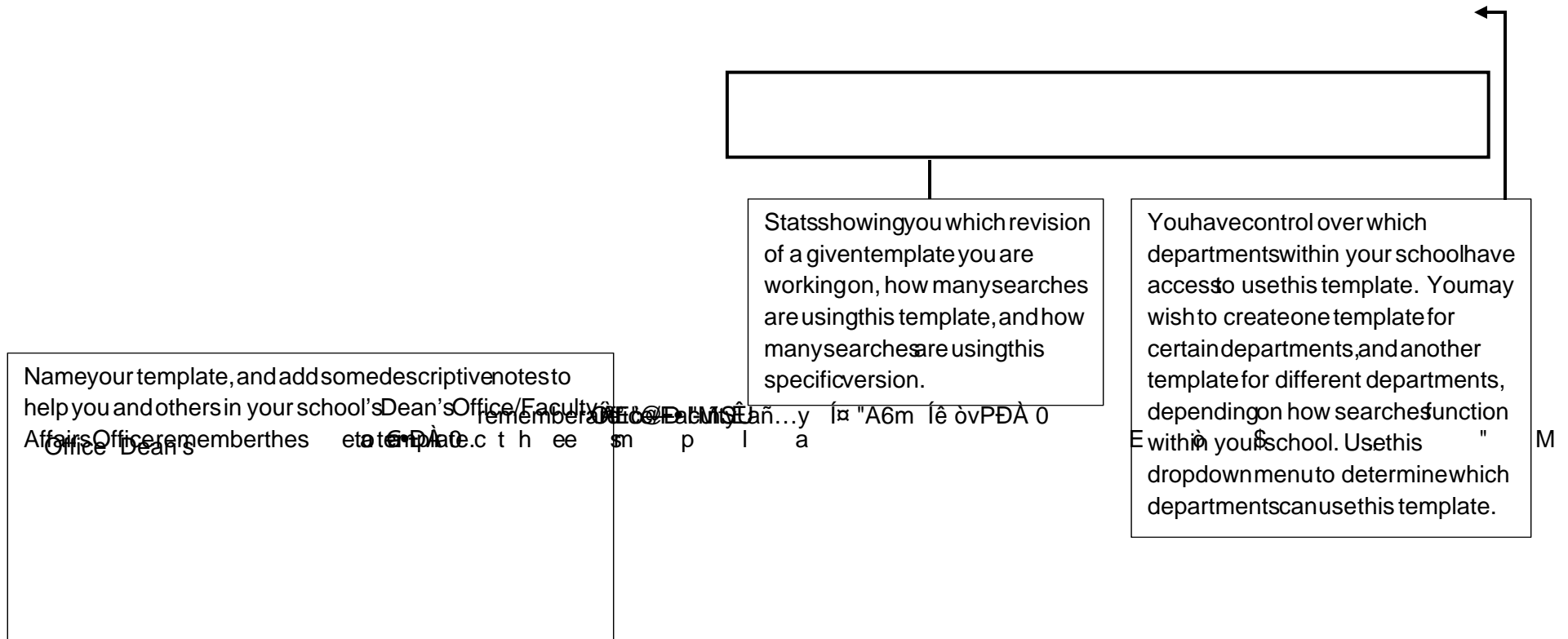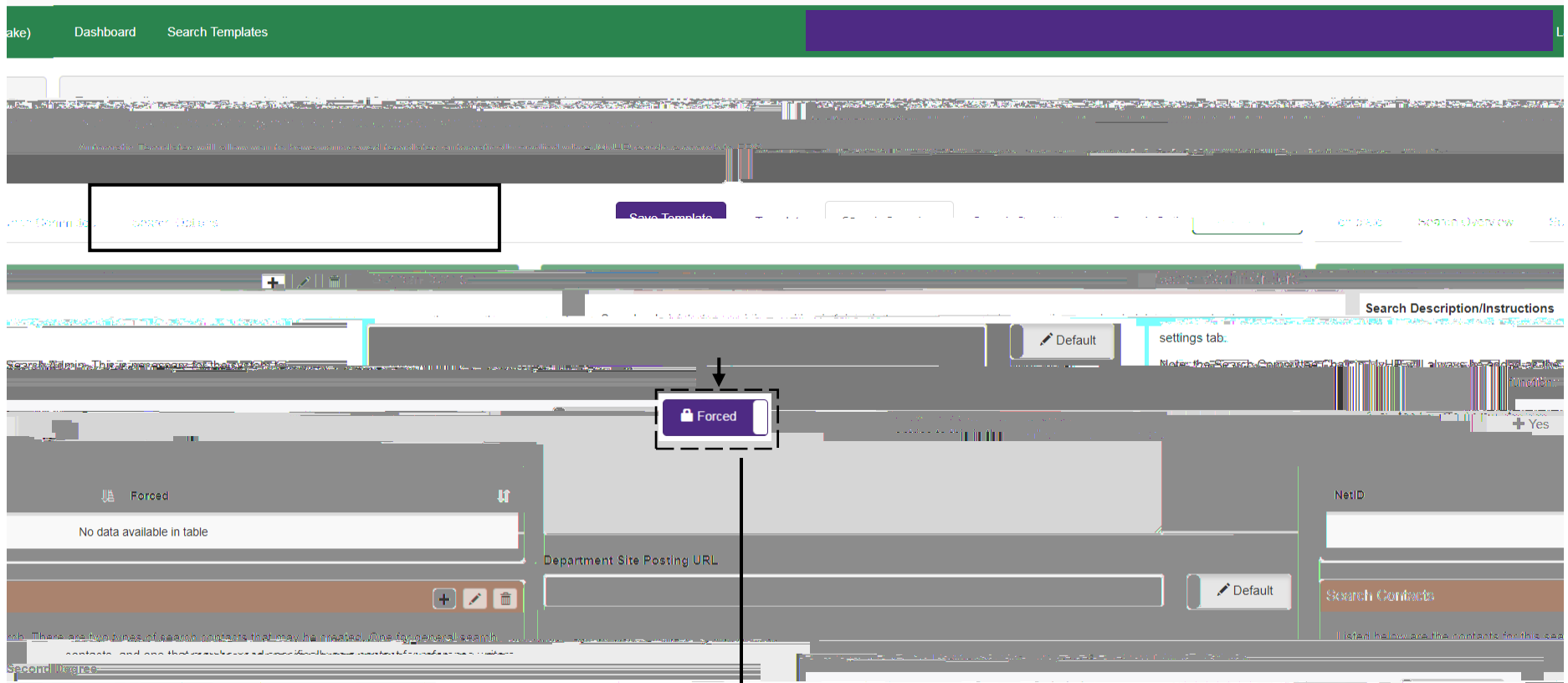# Guide to Using Search Templates

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 particular c

for a given school. Locking the field from editing will prevent department search administra

Affairs Office

staff will always retain edit access, even to locked fields.

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 state of the template.

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.

Save Template

Search Description/Instructions

✏ Default

settings tab.

🔒 Forced

Forced

NetID

No data available in table

Department Site Posting URL

✏ Default

Search Contacts

Second Degree

Recall that within a search in FRS, all search configuration is performed within the

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.

3

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 the entire school/unit... can be used to provide them with defaults tailored to their needs.

Administrator's ability to alter any configurable options, ...

Save Template

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

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

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

Required		
No		

Reference Type	Display Order
Other	1

Document Type + ✎ 🗑

...whether or not it is a required document. You may drag and drop to change your display order by clicking and dragging...

Ad Source Types + ✎ 🗑 item's display order.

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

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...change your display order by clicking...

yrecords@northwestern.edu to request its

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

+ Yes

If an ad source type you need is missing from the list please contact facult... addition.

Allow the Search Admins to add...

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

No data available in table

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.

- Filter Job Ranks - ▼	- Filter Templates - ▼		System Default ▼	✎	- Filter Departments - ▼
mplate	**Department**	**Job Rank**			**Tem**
System Default ▼	Allen Center Building Oper	Assistant/Assoc Prof (Posting)			
System Default ∨	Allen Center Building Oper	Assoc Dean (Posting)			

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)
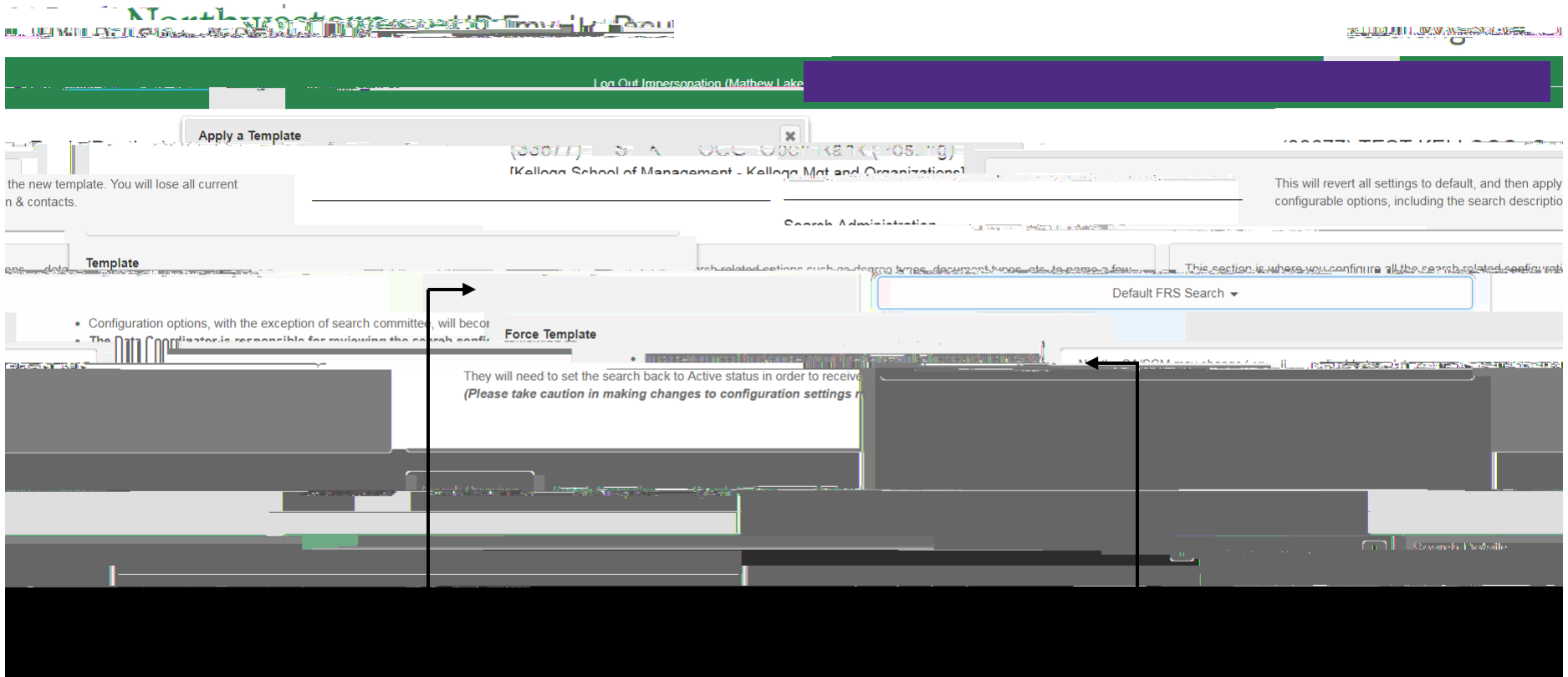
Once you have set these filters, click the Template dropdown to the right of the department/job ranks combination(s) upon which you wish to force a certain template. Select the template you wish to force – this user is forcing a template called "Standard Rookie Search".

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
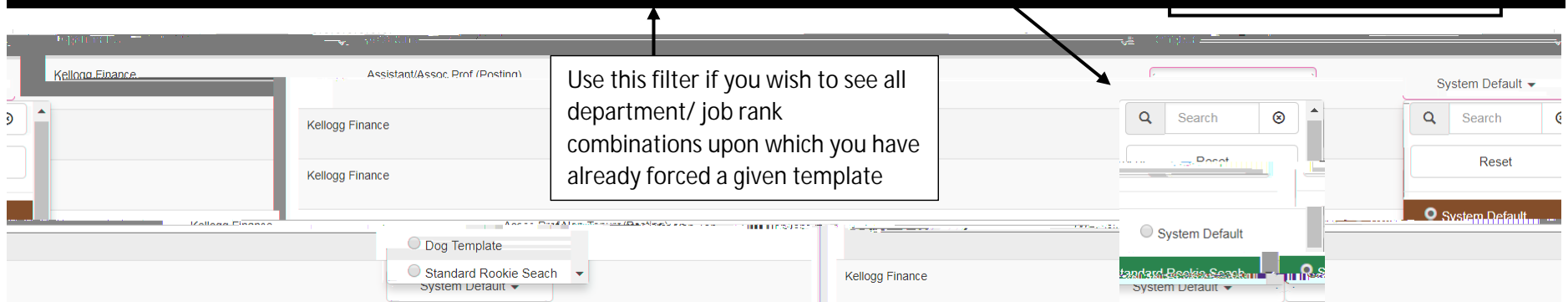
Setting an automatic template does not apply this template to any existing searches. Instead, it pre sets the use of this template for any searches yet to be created in the department/job rank combination(s) you have set. In the future, whenever a search using this department/job rank combination is 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

Apply a Template

the new template. You will lose all current
n & contacts.

Template

- Configuration options, with the exception of search committee, will become
- The Data Coordinator is responsible for reviewing the search confi

Force Template

They will need to set the search back to Active status in order to receive
(Please take caution in making changes to configuration settings m

Default FRS Search ▾

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.