### Configuring a Search in FRS – Quick Guide

Before a search can be set to Active status and begin receiving applications, some configurable options need to be set up in FRS. This is a guide to these options that a search committee or Search Administrator will need to decide on. **Check first with your school’s Dean’s Office** to ensure that the options you select match the school’s recruitment structure. Then, after configuring these options, reach out to the Dean’s Office to active the search.

#### 1. Search Structure

- What should the contact e-mail address be if applicants wish to contact the department (will be listed at the bottom of the application form). Must list at least one; may have a separate contact for reference questions.
  
  ***Set this option in the Search Contacts portion of the Settings section; see pg. 2***

- Edit the text of the Search Description, a brief paragraph that will appear at the top of the application form. Can be used for descriptive or instructional text.

- What should the minimum (i.e., required) and maximum number of references be for each application?

- Until what date should reference letters be accepted (need a date in this field even if position is open until filled)?

- Should applicants list only their highest degree earned, or other degrees too? Should listing these other degrees be required, or optional?

- Should references be automatically sent an e-mail requesting that they submit letters as soon as the applicant applies?

- Should applicants receive an automatic e-mail informing them when reference letters have been submitted on their behalf?

  ***Set these options by clicking the pencil icon in the Search Details portion of the Settings section; see pg. 3***

#### 2. Search Committee

- All search committee members, including the Chair, must have permissions set to define their level of access (view, edit, or no access) to applicant data, applicant materials, review scores, disposition codes, and other features.

  ***Set these permissions on the Search Committee tab of the Settings Section; see pgs. 4-5***

#### 3. Applicant and Reference Interface

- What reference types (e.g., Current Postdoc Advisor, Academic Colleague, etc.) should an applicant be able to select from?

- What application documents (e.g., CV, Research Statement) should an applicant be allowed to submit? Which should be required?

- Which degree types (e.g., PhD, MD) should an applicant have the option to select from?

- Optional: Which ad sources (i.e., “how did you hear about this opening?”) should an applicant be able to select from?

  *** Set these options on the Search Options tab of the Settings section; see pg. 6***

- Do you wish to edit the text of the e-mail that references will receive requesting that they submit letters on behalf of an applicant?

- Do you wish to edit the text of the auto-confirmation e-mail that applicants will receive when they apply?

  ***Set these options in the Email Templates portion of the Search Options tab in the Settings section; see pg. 7***
Configuring a Search – Basic Settings

Configure searches via the Settings tab

Edit/Add Search Administrators and Search Contacts;
REMINDER: FRS will grant the Search Administrator role to the individual who created the Job Opening in myHR. If this role needs to be delegated to a different individual instead, add that person’s information here. A Search Committee Chair’s information could also be added here if the chair will administer the search themselves.

Key details of the search structure can be adjusted here; See pg 3

The “Search Contact”, for basic search questions, is required. A separate contact for references, the “Reference Contact”, is optional.
Configuring a Search – Basic Settings, cont’d.

- **Set search to “Active” status to begin accepting applications (only a school’s Data Coordinator may do this)**
- **Can include dept website here if posting additional information about the position there – will appear at top of application form with the text “Click here to view the job announcement”**.
- **Should candidates be able to list a second degree earned, or just their highest degree? Should this be required?**
- **Mix/Max number of references accepted for each applicant**
- **Auto-email applicants’ references asking for letter of reference (yes/no)**
- **Send applicants confirmation emails when letters are uploaded on their behalf (yes/no)**
Configuring a Search – Search Committee Permissions

The MyHR Search Committee will pre-populate using the info entered into MyHR and approved by the Office of the Provost for this search.

If desired, change the phases which a committee member can review (“review phase”) or view (“show phases”). Can also allow committee member to only view applicants in certain disposition codes (i.e., only those who have reached “interview” status).

Adjust a search committee member’s permissions directly from this screen by clicking this icon; see details on next page.
Configuring a Search – Search Committee Permissions, cont’d.

As shown on previous page, click the pencil icon to set permissions for a search committee member. The graphic below details the purposes of each permission, and provides recommendations based on role.

<table>
<thead>
<tr>
<th>User Permissions</th>
<th>Permission Options</th>
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<tbody>
<tr>
<td>Applications</td>
<td>Application</td>
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<tr>
<td>Documents</td>
<td>Applications [View</td>
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<tr>
<td>References</td>
<td>Documents</td>
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<td>Notes</td>
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<td>Notes</td>
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<tr>
<td>Review [No Access]</td>
<td>Admin Notes [View</td>
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<tr>
<td>Disposition</td>
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<tr>
<td>Disposition Codes [View Only]</td>
<td>Disposition Codes [View</td>
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**Application:** Allows user to view applicants’ applications, or to view and edit information within these applications.

**Documents:** Allows user to view applicants’ submitted documents, or to view and remove/replace documents.

**References:** Allows user to view the reference letters submitted on an applicant’s behalf, or to view and remove/replace these letters.

**Notes:** Allows user to view administrative notes in an applicant’s file, or to view and create/edit these notes.

*Recommended setting for all four of the above items: View/Edit for Search Administrators, View Only for Search Committee Members*

**Review:** Allows users to enter their review (score and comments) of an applicant’s candidacy. May also be set to no access, which will prevent a user from leaving a review.

*Recommended setting: View/Edit for Search Administrators and Search Committee Members*

**All-Reviews:** Allows users to view the reviews entered by other Search Committee Members. Can be sent to No Access if these reviews should remain private. *Recommended setting: View Only for Search Administrators and Search Committee Chair; schools’ discretion for Search Committee Members*

**Communications:** Allows users to view system communications sent to applicants, to edit and send these communications, or to have no access to these communications. *Recommended setting: View/Edit for Search Administrators, View Only for Search Committee Members*

**Disposition:** Allows users to view the disposition codes assigned to applicants, to assign these codes, or to have no access to this information. *Recommended setting: Schools’ discretion based on who will be entering this data.*
When a faculty applicant completes the application form for your search, s/he will select from dropdown menus for these four fields. Customize the content of these dropdown menus here.

The e-mail templates that the system sends to applicants can also be adjusted from this screen – *see next page*
Configuring a Search – Customizing Email Templates

FRS is pre-populated with e-mail templates that will be sent to applicants in various circumstances. These are customizable; to edit a template, click on the name of the template below, and then click the pencil icon. Be sure not to edit or remove the bracketed {email tokens}, as these will be auto-populated with data when the e-mails are sent.

NOTE: Should only be used in rare cases where a candidate is unable to apply through the online system. Do not re-send this e-mail to candidates who have already applied through FRS unless they request to change their Self-ID disclosures.

Sent to applicants after application is submitted

Sent to applicant’s references; can be auto-sent after application is submitted, or sent manually (see pg. 3 to adjust this setting)