

Adding Sources for Person Records

In **Settings > Sources**, you can include all the sources where users are going to find people to create records in your instance. The sources in this list are the options available in the Source field in person records, and they are also used for generating [built-in](#) and [internal](#) reports.

Click **Add Source**, and then complete the new source's information—the only required field is **Name**. You can choose to briefly explain when the source is used in **Description**, and [select a category](#) and [define a URL pattern](#).

Avature recommends that you list sources alphabetically for a better user experience. Click a source name and use **Up** and **Down** to move it where it needs to go.

Editing Sources for Person Records

If you need to rename a **Source**, you can do so by going to **Settings > Instance Configuration > Sources**, selecting the source and then clicking **Edit**. On the Edit source page, you can rename the source and change other properties. Click **Save**.

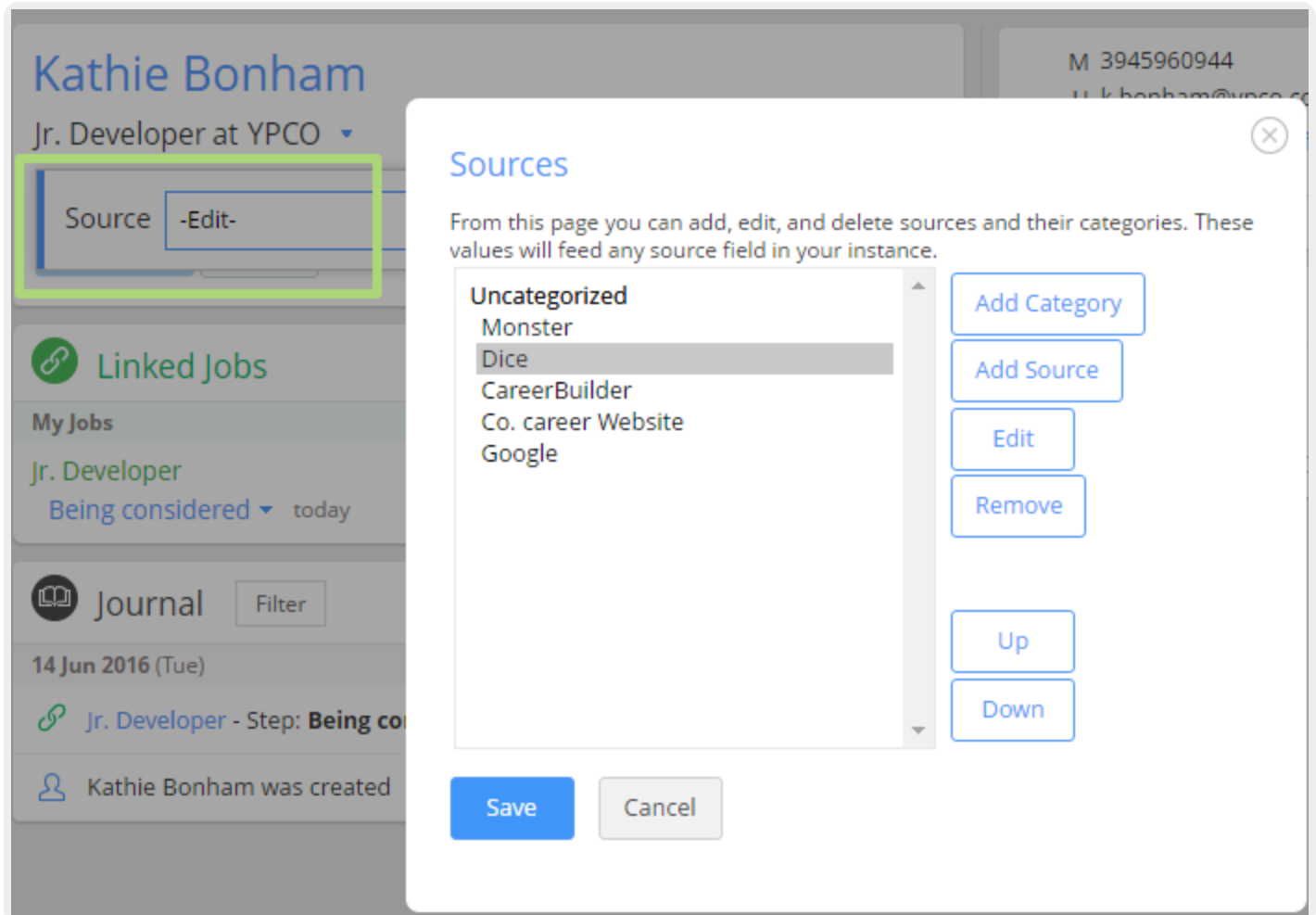
 Sources[Go back](#)

From this page you can add, edit, and delete sources and their categories. These values will feed any source field in your instance.

Social Networks	Add Category
Google +	Add Source
Twitter	Edit
LinkedIn	Remove
Facebook	Up
Job boards	Down
Bumeran	
CareerBuilder	
Clearance Jobs	
Dice	
Monster	
Vagas	
Worktec	
Polish Careers	
Xing	

[Save](#)[Cancel](#)

You can also do this from a person record by clicking the current **Source** and then selecting **-Edit-** from the drop-down menu that displays.



Sources

From this page you can add, edit, and delete sources and their categories. These values will feed any source field in your instance.

- Uncategorized
- Monster
- Dice**
- CareerBuilder
- Co. career Website
- Google

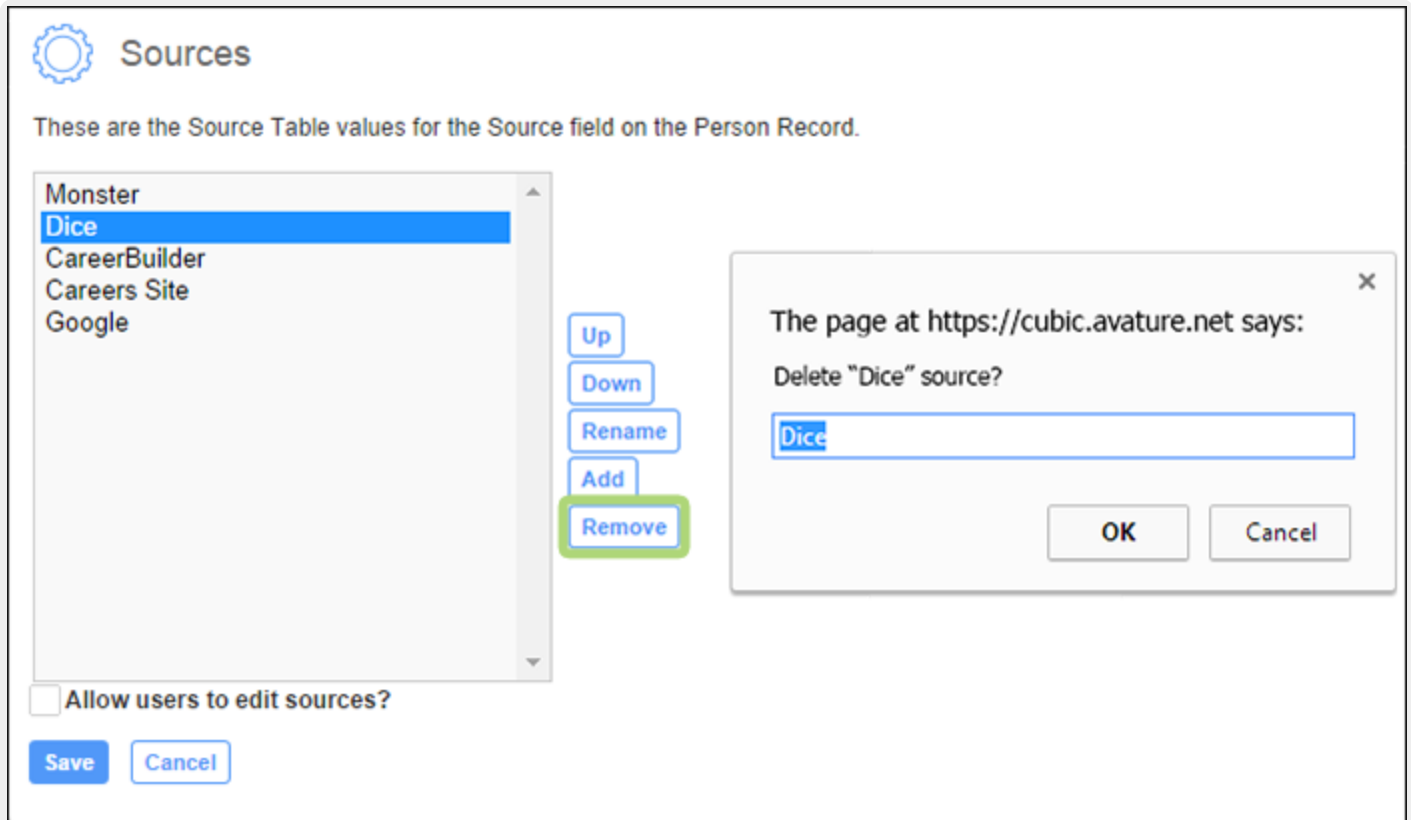
Buttons: Add Category, Add Source, Edit, Remove, Up, Down

Bottom buttons: Save, Cancel

The source will be modified in all existing records with that source.

Deleting Sources for Person Records

To delete a source, first go to **Settings > Instance Configuration > Sources**. Then select the source you want to delete and click the button **Remove**.



Sources that are being used in records or portals cannot be deleted. If the source is associated with person records, remove it from the records and then delete it. If it is assigned as the default source of a portal, ask your Avature Consultant to modify the portal default source and then delete it.

Configure Source Patterns for the Import to Avature Bookmark

When you [create a person record from a webpage using the Import to Avature bookmark](#), Avature analyzes the URL to see if it matches any existing source URL patterns. If it does, Avature creates the record and automatically populates the Source field with that information. If Avature doesn't recognize the URL, you can [add the source](#) and its URL pattern so that it's recognized in future imports.

Click your profile picture and select **Account Settings**. Under My Account, click **Import Link for Websites**.

A table shows all the sources configured in your platform (main menu > **System Settings** > **Sources**). To add or edit a URL pattern for a source, click **edit** for the source and type the pattern. If you type `www.example.com`, the pattern only recognizes the source as that single page. If you add an asterisk after the name (`www.example.com*`), all URLs that start with it are recognized. An asterisk before the name (`*example.com`) means all URLs that end with it are recognized. To make sure all scenarios are covered, Avature recommends simply typing the pattern with both asterisks (`*example.com*`).

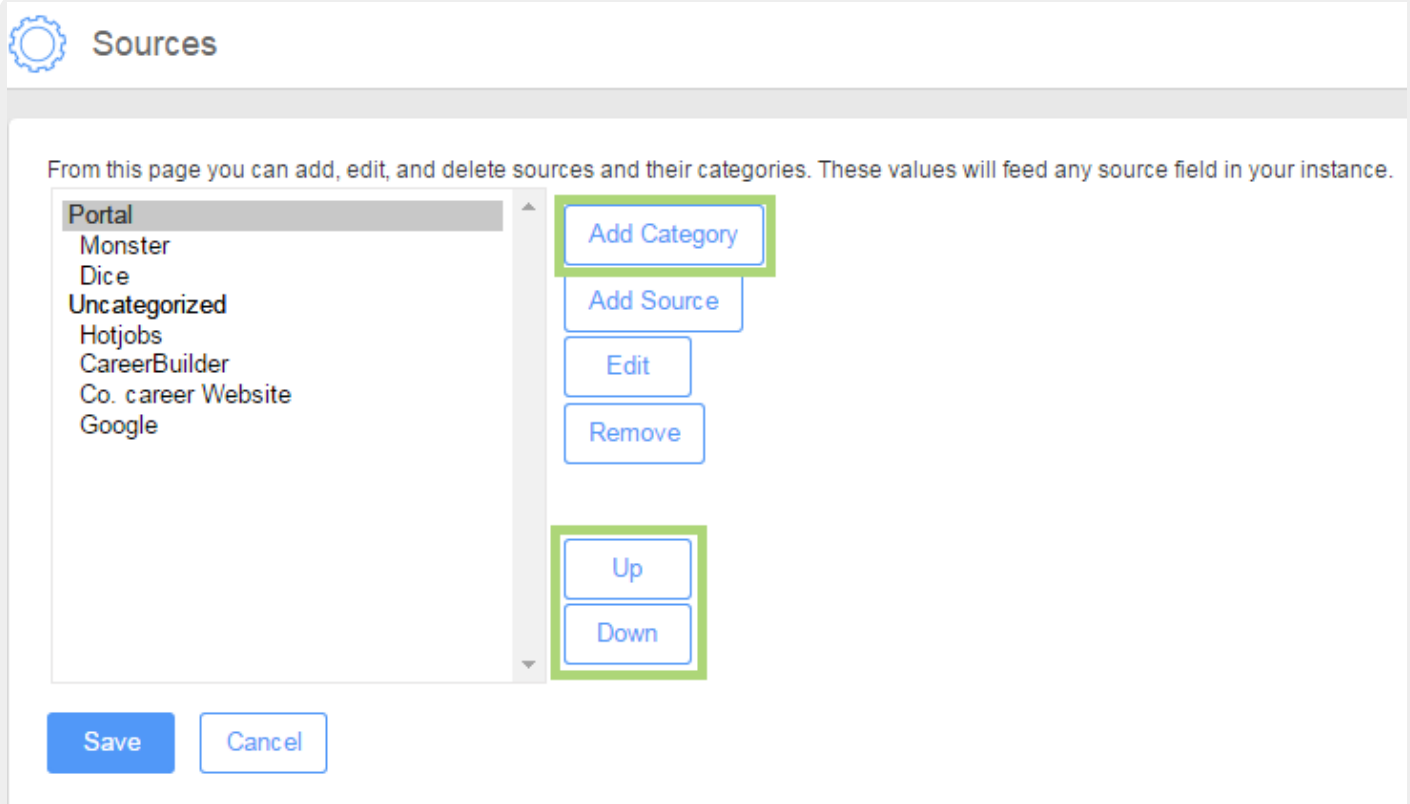
Repeat this process for the remaining sources and click **Save**.

Categorizing Sources for Person Records

You can manage person record sources by grouping them under different labels. Go to **Settings > Instance Configuration > Sources** and click **Add Category**.

After you create a new category, select a source and click **Up** and **Down** to move it to a category.

This will allow you to choose the sources that will be available in the **Source** field when creating person records, by selecting the categories to show in the source picker.



Sources

From this page you can add, edit, and delete sources and their categories. These values will feed any source field in your instance.

- Portal
- Monster
- Dice
- Uncategorized
- Hotjobs
- CareerBuilder
- Co. career Website
- Google

Buttons: Add Category, Add Source, Edit, Remove, Up, Down

Buttons: Save, Cancel