

Configure Employee Referrals

1

Access the Core tab of Page Options

2

Click the Referrals Edit icon

3

Select Account Creation Form Management fields

4

Create National Identifier rules

5

Create Duplication rules and click Submit

6

View your settings on the Refer a Friend screen

Dashboard

MY EMPLOYEES

RECRUITING

PERFORMANCE

LEARNING

SUCCESSION

CAREER CENTER

REPORTS

Employees

Main Dashboard

In this click-thru, you will configure Employee Referrals and view your new configuration settings on the Refer a Friend screen.

Click or tap each step on the screen to advance.

Begin

Kathryn Admin	12-Apr-2018	12-May-2018	+
Reine Admin	18-Apr-2018	None	+
Eped to Administrator	None	None	+

Configure Employee Referrals

1

Access the Core tab of Page Options

2

Click the Referrals Edit icon

3

Select Account Creation Form Management fields

4

Create National Identifier rules

5

Create Duplication rules and click Submit

6

View your settings on the Refer a Friend screen

1

Click the Administration icon

Dashboard

MY EMPLOYEES

RECRUITING

PERFORMANCE

LEARNING

SUCCESSION

CAREER CENTER

REPORTS

Employees Search...

Main Dashboard

Get More Widgets

Alerts

- New Tuition Assistance Requests (13)
- Score this Appraisal - Appraisal (Project Metrics Test) Reine Admin

Show All

Continuous Feedback

EMPLOYEE	MOST RECENT MEETING	NEXT MEETING	ACTION
Kathryn Admin	12 Apr 2018	12 May 2018	+
Reine Admin	18 Apr 2018	None	+
Eepito Administrator	None	None	+

Configure Employee Referrals

1

Access the Core tab of Page Options

2

Click the Referrals Edit icon

3

Select Account Creation Form Management fields

4

Create National Identifier rules

5

Create Duplication rules and click Submit

6

View your settings on the Refer a Friend screen

The screenshot shows the 'Administration' page. On the left is a dark sidebar menu with categories: RECRUITING, PERFORMANCE, LEARNING, SUCCESSION, CAREER CENTER, and REPORTS. The main content area is titled 'Administration' and is divided into sections: Recruiting, Performance, and Appraisals. The Recruiting section is expanded, showing sub-sections: Configuration, Onboarding, Cross-Posting, Vendors, Employee Referral Program, and Résumés. The Employee Referral Program sub-section is further expanded, listing options like Approve Earned Awards, Pay Installments, Manage Referral Awards, Approve Award Plans, Manage Award Plans by Requisition, and Benefits. On the right side, there are three panels: Development (Career Path Templates, Potential Rating Tips), Succession Planning (Manage Succession Plans, Configure 9 Box), and Global Settings (System Administration, Your Organization). In the Global Settings panel, the 'System Administration' sub-section is expanded, and 'Page Options' is highlighted with a yellow box. A yellow callout box with a '1' inside points to 'Page Options' and contains the text: 'Scroll to the Global Settings, System Administration area and click Page Options'. At the bottom left, a URL is visible: https://docenhancement.awsqa.hua.hrsmart.com/hr/hua/PageOptions/index

Configure Employee Referrals

1

Access the Core tab of Page Options

2

Click the Referrals Edit icon

3

Select Account Creation Form Management fields

4

Create National Identifier rules

5

Create Duplication rules and click Submit

6

View your settings on the Refer a Friend screen

Dashboard

MY EMPLOYEES

RECRUITING

PERFORMANCE

LEARNING

SUCCESSION

CAREER CENTER

REPORTS

Employees Search...

Administration / Global Settings / System Administration / Page Options

Page Options

RECRUITING CORE

1

Click the Core tab

Job Search

Internal Job Search Options	This controls the page options for the internal job search.	
External Job Search Options	This controls the page options for the external job search.	
Hourly Job Search Options	This controls the page options for the external hourly job search.	

Job Details

Hourly Job Details Fields	This controls the page options for the hourly job details screen.	
Internal Job Details Fields	This controls the page options for the internal job details screen.	
External Job Details Fields	This controls the page options for the external job details screen.	

Configure Employee Referrals

1

Access the Core tab of Page Options

2

Click the Referrals Edit icon

3

Select Account Creation Form Management fields

4

Create National Identifier rules

5

Create Duplication rules and click Submit

6

View your settings on the Refer a Friend screen

The screenshot shows the Deltak Talent Management interface. The top navigation bar includes the company name, language (English), and user profile. The left sidebar contains a menu with categories like MY EMPLOYEES, RECRUITING, PERFORMANCE, LEARNING, SUCCESSION, CAREER CENTER, and REPORTS. The main content area is titled 'Page Options' and has a breadcrumb trail: Administration / Global Settings / System Administration / Page Options. Below the title, there are tabs for 'RECRUITING' and 'CORE', with 'CORE' being the active tab. A table lists various account types and their uniqueness criteria, with an edit icon for each row. The 'Referrals' row is highlighted with a yellow box, and a callout bubble points to its edit icon with the text 'Click the Edit icon for the Referrals account type'. The URL at the bottom is https://docenhancement.awsqa.hua.hrsmart.com/hr/hua/PageOptions/update/ats%7CReferral%7CaddReferral.

Application Development Testing Company English

Employees Search...

Administration / Global Settings / System Administration / Page Options

Page Options

RECRUITING CORE

▼ User Uniqueness & Account Creation Management

Contact	This controls the uniqueness criteria and account creation form for a Contact when added as a Candidate to a Requisition.	
External Job Seeker	This controls the uniqueness criteria and account creation form for the External job seeker.	
Internal Employee	This controls the uniqueness criteria and account creation form for Internal employees.	
Recruiting User Upload	This controls the uniqueness criteria and account creation form for Recruiting uploaded résumés.	
Referrals	This controls the uniqueness criteria and account creation form for Referrals .	
Vendor Submitted Résumé	This controls the uniqueness criteria and account creation form for Vendor submitted résumés.	

Click the Edit icon for the Referrals account type

https://docenhancement.awsqa.hua.hrsmart.com/hr/hua/PageOptions/update/ats%7CReferral%7CaddReferral

v15.1-rc.2

Configure Employee Referrals

1

Access the Core tab of Page Options

2

Click the Referrals Edit icon

3

Select the Account Creation Form Management fields

4

Create National Identifier rules

5

Create Duplication rules and click Submit

6

View your settings on the Refer a Friend screen

SUCCESSION

CAREER CENTER

REPORTS

Referrals

Account Creation Form Management

To show a field on the form, check the box in the "Display" column. To make a field required, check the box in the "Mark Required" column.

SECTION	FIELD	DISPLAY	MARK REQUIRED
Basic Information			
	Username	<input type="checkbox"/>	<input type="checkbox"/>
	First Name	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	Middle Name	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	Last Name	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	Address One	<input type="checkbox"/>	<input type="checkbox"/>
	Address Two	<input type="checkbox"/>	<input type="checkbox"/>
	Address Three	<input type="checkbox"/>	<input type="checkbox"/>
	Country	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	ST/PR	<input type="checkbox"/>	<input type="checkbox"/>
	City	<input type="checkbox"/>	<input type="checkbox"/>
	Zip/Postal Code	<input type="checkbox"/>	<input type="checkbox"/>

3

Check the box in the DISPLAY column for each field you want to show on the Account Creation forms, like the Refer a Friend screen

Configure Employee Referrals

1

Access the Core tab of Page Options

2

Click the Referrals Edit icon

3

Select the Account Creation Form Management fields

4

Create National Identifier rules

5

Create Duplication rules and click Submit

6

View your settings on the Refer a Friend screen

SUCCESSION

CAREER CENTER

REPORTS

Referrals

Account Creation Form Management

To show a field on the form, check the box in the "Display" column. To make a field required, check the box in the "Mark Required" column.

SECTION	FIELD	DISPLAY	MARK REQUIRED
Basic Information			
	Username	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	First Name	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	Middle Name	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	Last Name	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	Address One	<input type="checkbox"/>	<input type="checkbox"/>
	Address Two	<input type="checkbox"/>	<input type="checkbox"/>
	Address Three	<input type="checkbox"/>	<input type="checkbox"/>
	Country	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	ST/PR	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	City	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	Zip/Postal Code	<input checked="" type="checkbox"/>	<input type="checkbox"/>

3

Check the box in the MARK REQUIRED column for each field you want to require

Configure Employee Referrals

1

Access the Core tab of Page Options

2

Click the Referrals Edit icon

3

Select Account Creation Form Management fields

4

Create rules for collecting National Identifier

5

Create Duplication Rules and click Submit

6

View your settings on the Refer a Friend screen

SECTION	FIELD	DISPLAY	MARK REQUIRED
Contact Details			
	Phone Number	<input checked="" type="checkbox"/>	<input type="checkbox"/>
			<input type="checkbox"/>
			<input type="checkbox"/>

Follow the steps on the next few slides to create rules for how you collect National Identifiers from users

National Identifier Collection

Use this section to create the rules for collecting the National Identifier from the user when completing the Account Creation form. Select the Country, the Basis for Display, and the Rule. Click the "Add Rule" button after each entry.

COUNTRY	BASIS FOR DISPLAY	COUNTRY	BASIS FOR DISPLAY	RULE	ACTION
<input type="text" value="-- Select --"/>	<input type="text" value="-- Select --"/>	United States of America (SSN)	Country of residence	Display only	<input checked="" type="checkbox"/>

4

Click the drop-down for a list of countries

Duplication Rules

There are two types of rules: "Warn but Allow" and "Deny". Multiple rules of each type can be created. Select the data points from the **Available Fields** area and drag each into the **Selected Fields** area. NOTE: The system will use **all** the Selected Fields to check for duplicates.

- The **Warn but Allow rule** will check against the selected criteria and advise the job seeker/user that a possible duplicate has been found *but also allow him to continue creating the account*. NOTE: Using this type of rule could allow duplicates of the same job seeker/user.
 - If it's a job seeker, the system will prompt him to retrieve his login information or continue creating the account.
 - If it's another user, such as a recruiter or vendor, the system will advise that this is a possible duplicate but allow him to continue creating the account.

Configure Employee Referrals

1

Access the Core tab of Page Options

2

Click the Referrals Edit icon

3

Select Account Creation Form Management fields

4

Create rules for collecting National Identifier

5

Create Duplication Rules and click Submit

6

View your settings on the Refer a Friend screen

SECTION	FIELD	DISPLAY	MARK REQUIRED
	Phone Number	<input type="checkbox"/>	<input type="checkbox"/>
	Preferred Method of Electronic Communication	<input type="checkbox"/>	<input type="checkbox"/>
	Mobile Phone Number	<input checked="" type="checkbox"/>	<input type="checkbox"/>

National Identifier Collection

Use this section to create the rules for collecting the National Identifier from the user when completing the Account Creation form. Select the Country, the Basis for Display, and the Rule. Click the "Add Rule" button after each entry.

COUNTRY	BASIS FOR DISPLAY	COUNTRY	BASIS FOR DISPLAY	RULE	ACTION
<input type="text" value="-- Select --"/> <input type="text" value="-- Select --"/> Brazil (CPF) Canada (SIN) France (NIR) India (PAN) Italy (CF) South Africa (ID Number) United Kingdom (NINO) United States of America (SSN)	<input type="text" value="-- Select --"/>	United States of America (SSN)	Country of residence	Display only	<input checked="" type="checkbox"/>

4

Select the country to associate with the rule

There are two types of rules: "Warn but Allow" and "Deny". Multiple rules of each type can be created. Select the data points from the **Available Fields** area and drag each into the **Selected Fields** area. NOTE: The system will use **all** the Selected Fields to check for duplicates.

- The **Warn but Allow rule** will check against the selected criteria and advise the job seeker/user that a possible duplicate has been found *but also allow him to continue creating the account*. NOTE: Using this type of rule could allow duplicates of the same job seeker/user.
 - If it's a job seeker, the system will prompt him to retrieve his login information or continue creating the account.
 - If it's another user, such as a recruiter or vendor, the system will advise that this is a possible duplicate but allow him to continue creating the account.
- The **Deny rule** will check against the selected criteria and display an error message to the job seeker/user that a duplicate has been found.
 - If it's a job seeker, the system will prompt him to retrieve his login so that he can access the account he previously created.

Configure Employee Referrals

1

Access the Core tab of Page Options

2

Click the Referrals Edit icon

3

Select Account Creation Form Management fields

4

Create rules for collecting National Identifier

5

Create Duplication Rules and click Submit

6

View your settings on the Refer a Friend screen

SECTION	FIELD	DISPLAY	MARK REQUIRED
	Phone Number		
	Preferred Method of Ele		
	Mobile Phone Number		

National Identifier Collection

Use this section to create the rules for collecting the National Identifier. Select the Basis for Display, and the Rule. Click the "Add Rule" button after each rule.

COUNTRY	BASIS FOR DISPLAY	DISPLAY	MARK REQUIRED		
zila (CPF)	-- Select --	United States of America (SSN)	Country of residence	Display only	X

-- Select --

-- Select --

Always

Country of residence

Requisition primary location

Either residence or req. location

Add Rule

4

Select the Basis for Display:

- **Always**
- **Country of residence** – National identity asked only if the applicant resides in the selected country
- **Requisition primary location** – National identity asked only if the primary location of the requisition is in the selected country
- **Either residence or req. location** – National identity asked if either of the above are true

Duplication Rules

There are two types of rules: "Warn but Allow" and "Deny". Multiple rules of each type can be created. Select the data points from the **Available Fields** area and drag each into the **Selected Fields** area. NOTE: The system will use **all** the Selected Fields to check for duplicates.

- The **Warn but Allow rule** will check against the selected criteria and advise the job seeker/user that a possible duplicate has been found *but also allow him to continue creating the account*. NOTE: Using this type of rule could allow duplicates of the same job seeker/user.
 - If it's a job seeker, the system will prompt him to retrieve his login information or continue creating the account.
 - If it's another user, such as a recruiter or vendor, the system will advise that this is a possible duplicate but allow him to continue creating the account.
- The **Deny rule** will check against the selected criteria and display an error message to the job seeker/user that a duplicate has been found.

Configure Employee Referrals

1

Access the Core tab of Page Options

2

Click the Referrals Edit icon

3

Select Account Creation Form Management fields

4

Create rules for collecting National Identifier

5

Create Duplication Rules and click Submit

6

View your settings on the Refer a Friend screen

SECTION	FIELD	DISPLAY	MARK REQUIRED
Contact Details			
	Phone Number	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	Preferred Method of Electronic Communication	<input type="checkbox"/>	<input type="checkbox"/>
	Mobile Phone Number	<input checked="" type="checkbox"/>	<input type="checkbox"/>

National Identifier Collection

Use this section to create the rules for collecting the National Identifier from the user when completing the Account Creation form. Select the Country, the Basis for Display, and the Rule. Click the "Add Rule" button after each entry.

BASIS FOR DISPLAY	RULE	COUNTRY	BASIS FOR DISPLAY	RULE	ACTION
<input type="text" value="-- Select --"/>	<input type="text" value="-- Select --"/>				

4 Select whether the National identifier input field will display on the screen, or whether it will display and be marked as a required field

Duplication Rules

There are two types of rules: "Warn but Allow" and "Deny". Multiple rules of each type can be created. Select the data points from the **Available Fields** area and drag each into the **Selected Fields** area. NOTE: The system will use **all** the Selected Fields to check for duplicates.

- The **Warn but Allow rule** will check against the selected criteria and advise the job seeker/user that a possible duplicate has been found *but also allow him to continue creating the account*. NOTE: Using this type of rule could allow duplicates of the same job seeker/user.
 - If it's a job seeker, the system will prompt him to retrieve his login information or continue creating the account.
 - If it's another user, such as a recruiter or vendor, the system will advise that this is a possible duplicate but allow him to continue creating the account.

Configure Employee Referrals

1

Access the Core tab of Page Options

2

Click the Referrals Edit icon

3

Select Account Creation Form Management fields

4

Create rules for collecting National Identifier

5

Create Duplication Rules and click Submit

6

View your settings on the Refer a Friend screen

SECTION	FIELD	DISPLAY	MARK REQUIRED
Contact Details			
	Phone Number	<input type="checkbox"/>	<input type="checkbox"/>
	Preferred Method of Electronic Communication	<input type="checkbox"/>	<input type="checkbox"/>
	Mobile Phone Number	<input checked="" type="checkbox"/>	<input type="checkbox"/>

National Identifier Collection

Use this section to create the rules for collecting the National Identifier from the user when completing the Account Creation form. Select the Country, the Basis for Display, and the Rule. Click the "Add Rule" button after each entry.

BASIS FOR DISPLAY	RULE	COUNTRY	BASIS FOR DISPLAY	RULE	ACTION
Always	Display only	United States of America (SSN)	Country of residence	Display only	<input checked="" type="checkbox"/>

Add Rule

4

Click Add Rule

Duplication Rules

There are two types of rules: "Warn but Allow" and "Deny". Multiple rules of each type can be created. Select the data points from the **Available Fields** area and drag each into the **Selected Fields** area. NOTE: The system will use **all** the Selected Fields to check for duplicates.

- The **Warn but Allow** rule will check against the selected criteria and advise the job seeker/user that a possible duplicate has been found *but also allow him to continue creating the account*. NOTE: Using this type of rule could allow duplicates of the same job seeker/user.
 - If it's a job seeker, the system will prompt him to retrieve his login information or continue creating the account.
 - If it's another user, such as a recruiter or vendor, the system will advise that this is a possible duplicate but allow him to continue creating the account.

Configure Employee Referrals

1

Access the Core tab of Page Options

2

Click the Referrals Edit icon

3

Select Account Creation Form Management fields

4

Create rules for collecting National Identifier

5

Create Duplication Rules and click Submit

6

View your settings on the Refer a Friend screen

SECTION	FIELD	DISPLAY	MARK REQUIRED
Contact Details			
	Phone Number	<input type="checkbox"/>	<input type="checkbox"/>
	Preferred Method of Electronic Communication	<input type="checkbox"/>	<input type="checkbox"/>
	Mobile Phone Number	<input checked="" type="checkbox"/>	<input type="checkbox"/>

National Identifier Collection

Use this section to create the rules for collecting the National Identifier. Click the "Add Rule" button after each entry.

The new rule is added to the grid on the right. To remove a rule, click the Delete icon in the Action column

BASIS FOR DISPLAY	RULE	COUNTRY	BASIS FOR DISPLAY	RULE	ACTION
<input type="text" value="Always"/>	<input type="text" value="Display only"/>	United States of America (SSN)	Country of residence	Display only	<input type="button" value="x"/>
		Brazil (CPF)	Always	Display only	<input type="button" value="x"/>

Duplication Rules

There are two types of rules: "Warn but Allow" and "Deny". Multiple rules of each type can be created. Select the data points from the **Available Fields** area and drag each into the **Selected Fields** area. NOTE: The system will use **all** the Selected Fields to check for duplicates.

- The **Warn but Allow** rule will check against the selected criteria and advise the job seeker/user that duplicates exist. The user can then choose to *continue creating the account*. NOTE: Using this type of rule could allow duplicates of the same user.
 - If it's a job seeker, the system will prompt him to retrieve his login information or continue creating the account.
 - If it's another user, such as a recruiter or vendor, the system will advise that this is a possible duplicate.

4

Click the arrow to scroll down to the Duplication Rules section

Configure Employee Referrals

1

Access the Core tab of Page Options

2

Click the Referrals Edit icon

3

Select Account Creation Form Management fields

4

Create rules for collecting National Identifier

5

Create Duplication Rules and click **Submit**

6

View your settings on the Refer a Friend screen

Duplication Rules

There are two types of rules: "Warn but Allow" and "Deny". Multiple rules of each type can be created. Select the data points from the Available Fields area and drag each into the Selected Fields area. NOTE: The system will use all

- The **Warn but Allow** rule will check against the selected criteria and if a duplicate is found, the system will *continue creating the account*. NOTE: Using this type of rule:
 - If it's a job seeker, the system will prompt him to create a new account.
 - If it's another user, such as a recruiter or vendor, the system will prompt him to log out.
- The **Deny** rule will check against the selected criteria and if a duplicate is found, the system will *block the creation of the account*. NOTE: Using this type of rule:
 - If it's a job seeker, the system will prompt him to create a new account.
 - If it's another user, such as a recruiter or vendor, the system will prompt him to log out.

A Duplication Rule allows you to:

- Specify the data to use to determine if a referral is added as a duplicate
- Determine whether to display:
 - a warning, but allow the creation of the duplicate
 - an error message and block the creation of the duplicate

Available Fields

- First Name
- Middle Name
- Last Name
- Address One
- Address Two
- Address Three
- Country
- ST/PR

Selected Fields

- Deny Username
- Deny E-mail
- Deny Mobile Phone Number
- Deny First Name AND Last Name AND Address One AND Address Two AND Address Three AND City AND ST/PR
- Deny First Name AND Last Name
- Deny CPF

RULE TYPE:

Warn but Allow Deny

Continue

Add Rule

5

To select the data to use to determine duplication, select fields from the Available Fields area and drag them to the Selected Fields area.

Configure Employee Referrals

1

Access the Core tab of Page Options

2

Click the Referrals Edit icon

3

Select Account Creation Form Management fields

4

Create rules for collecting National Identifier

5

Create Duplication Rules and click **Submit**

6

View your settings on the Refer a Friend screen

Duplication Rules

There are two types of rules: "Warn but Allow" and "Deny". Multiple rules of each type can be created. Select the data points from the **Available Fields** area and drag each into the **Selected Fields** area. NOTE: The system will use **all** the Selected Fields to check for duplicates.

- The **Warn but Allow rule** will check against the selected criteria and advise the job seeker/user that a possible duplicate has been found *but also allow him to continue creating the account*. NOTE: Using this type of rule could allow duplicates of the same job seeker/user.
 - If it's a job seeker, the system will prompt him to retrieve his login information or continue creating the account.
 - If it's another user, such as a recruiter or vendor, the system will advise that this is a possible duplicate but allow him to continue creating the account.
- The **Deny rule** will check against the selected criteria and display an error message to the job seeker/user that a duplicate has been found.
 - If it's a job seeker, the system will prompt him to retrieve his login so that he can access the account he previously created.
 - If it's another user, such as a recruiter or vendor, the system will not allow him to proceed with creating the account.

5

Select what happens when a duplicate referral is added. See the top of the screen for field descriptions

Available Fields	Selected Fields	TYPE	CRITERIA
<input type="checkbox"/> First Name	<input checked="" type="checkbox"/> First Name		
<input type="checkbox"/> Middle Name	<input type="checkbox"/> Middle Name		
<input type="checkbox"/> ST/PR	<input type="checkbox"/> ST/PR		
<input type="checkbox"/> County	<input type="checkbox"/> County		
	<input checked="" type="checkbox"/> City	Deny	SSN
	<input checked="" type="checkbox"/> Zip/Postal Code	Deny	First Name AND Last Name AND Address One AND Address Two AND Address Three AND City AND ST/PR AND Country
	<input checked="" type="checkbox"/> Country	Warn but Allow	First Name AND Last Name

RULE TYPE:
 Warn but Allow Deny

Add Rule

Configure Employee Referrals

1

Access the Core tab of Page Options

2

Click the Referrals Edit icon

3

Select Account Creation Form Management fields

4

Create rules for collecting National Identifier

5

Create Duplication Rules and click **Submit**

6

View your settings on the Refer a Friend screen

Duplication Rules

There are two types of rules: "Warn but Allow" and "Deny". Multiple rules of each type can be created. Select the data points from the **Available Fields** area and drag each into the **Selected Fields** area. NOTE: The system will use **all** the Selected Fields to check for duplicates.

- The **Warn but Allow rule** will check against the selected criteria and advise the job seeker/user that a possible duplicate has been found *but also allow him to continue creating the account*. NOTE: Using this type of rule could allow duplicates of the same job seeker/user.
 - If it's a job seeker, the system will prompt him to retrieve his login information or continue creating the account.
 - If it's another user, such as a recruiter or vendor, the system will advise that this is a possible duplicate but allow him to continue creating the account.
- The **Deny rule** will check against the selected criteria and display an error message to the job seeker/user that a duplicate has been found.
 - If it's a job seeker, the system will prompt him to retrieve his login so that he can access the account he previously created.
 - If it's another user, such as a recruiter or vendor, the system will not allow him to proceed with creating the account.

Available Fields	Selected Fields	TYPE	CRITERIA
<input type="checkbox"/> First Name	<input type="checkbox"/> Last Name	Deny	Username ✕
<input type="checkbox"/> Middle Name	<input type="checkbox"/> Address One	Deny	E-mail ✕
<input type="checkbox"/> ST/PR	<input type="checkbox"/> Address Two	Deny	Mobile Phone Number ✕
<input type="checkbox"/> County	<input type="checkbox"/> Address Three	Deny	SSN ✕
	<input type="checkbox"/> City	Deny	First Name AND Last Name AND Address One AND Address Two AND Address Three AND City AND ST/PR AND Country ✕
	<input type="checkbox"/> Zip/Postal Code		
	<input type="checkbox"/> Country	Warn but Allow	First Name AND Last Name ✕

RULE TYPE:
 Warn but Allow Deny

Add Rule

5

Click **Add Rule**

Configure Employee Referrals

1

Access the Core tab of Page Options

2

Click the Referrals Edit icon

3

Select Account Creation Form Management fields

4

Create rules for collecting National Identifier

5

Create Duplication Rules and click **Submit**

6

View your settings on the Refer a Friend screen

The screenshot displays the configuration interface for Employee Referrals. It is divided into two main sections: 'Available Fields' and 'Selected Fields'.

Available Fields:

- First Name
- Middle Name
- Last Name
- Address One
- Address Two
- Address Three
- Country
- ST/PR

Selected Fields:

TYPE	CRITERIA	
Deny	Username	✕
Deny	E-mail	✕
Deny	Mobile Phone Number	✕
Deny	SSN	✕
Deny	First Name AND Last Name AND Address One AND Address Two AND Address Three AND City AND ST/PR AND Country	✕
Deny	Last Name AND Address One AND Address Two AND Address Three AND City AND Zip/Postal Code AND Country	✕

RULE TYPE:

Warn but Allow Deny

Add Rule

A dark blue callout box highlights the text: "The new rule is added to the grid."

A yellow callout box highlights the "Submit" button in the bottom right corner, with the text: "Click **Submit** to save your Referrals Page Options settings".

The version number "v15.1-rc.5" is visible in the bottom right corner.

Configure Employee Referrals

1

Access the Core tab of Page Options

2

Click the Referrals Edit icon

3

Select Account Creation Form Management fields

4

Create rules for collecting National Identifier

5

Create Duplication Rules and click Submit

6

View your settings on the Refer a Friend screen

Dashboard

MY EMPLOYEES

RECRUITING

PERFORMANCE

LEARNING

SUCCESSION

CAREER CENTER

REPORTS

Success: Page options updated successfully.

Administration / Global Settings / System Administration / Page Options

Page Options

View This Page Back to Main

Referrals

Account Creation Form Management

To show a field on the form, check the box in the "Display" column. To make a field required, check the box in the "Mark Required" column.

	DISPLAY	MARK REQUIRED
Username	<input type="checkbox"/>	<input type="checkbox"/>
First Name	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Middle Name	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Last Name	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Address One	<input checked="" type="checkbox"/>	<input type="checkbox"/>

6

Open the Refer a Friend screen to see your changes. Click **Career Center**

Configure Employee Referrals

1

Access the Core tab of Page Options

2

Click the Referrals Edit icon

3

Select Account Creation Form Management fields

4

Create rules for collecting National Identifier

5

Create Duplication Rules and click Submit

6

View your settings on the Refer a Friend screen

Dashboard

MY EMPLOYEES

RECRUITING

PERFORMANCE

LEARNING

SUCCESSION

CAREER CENTER

My Résumés

Job Search

Referrals

Offers

New Hire Checklist

Career Development

REPORTS

Employees Search...

Administration / Global Settings / System Administration / Page Options

Page Options

View This Page Back to Main

Referrals

Account Creation Form Management

To show a field on the form, check the box in the "Display" column. To make a field required, check the box in the "Mark Required" column.

SECTION	FIELD	DISPLAY	MARK REQUIRED
Account Creation Form Management	Username	<input type="checkbox"/>	<input type="checkbox"/>
Account Creation Form Management	First Name	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Account Creation Form Management	Middle Name	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Account Creation Form Management	Last Name	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Account Creation Form Management	Address One	<input checked="" type="checkbox"/>	<input type="checkbox"/>

6

Click Referrals

Configure Employee Referrals

1

Access the Core tab of Page Options

2

Click the Referrals Edit icon

3

Select Account Creation Form Management fields

4

Create rules for collecting National Identifier

5

Create Duplication Rules and click Submit

6

View your settings on the Refer a Friend screen

Dashboard

MY EMPLOYEES

RECRUITING

PERFORMANCE

LEARNING

SUCCESSION

CAREER CENTER

My Résumés

Job Search

Referrals

Refer Someone

My Referrals

Offers

New Hire Checklist

Career Development

Employees Search...

Administration / Global Settings / System Administration / Page Options

Page Options

View This Page Back to Main

Referrals

Account Creation Form Management

To show a field on the form, check the box in the "Display" column. To make a field required, check the box in the "Mark Required" column.

SECTION	FIELD	DISPLAY	MARK REQUIRED
Basic Information	Username	<input type="checkbox"/>	<input type="checkbox"/>
	First Name	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	Middle Name	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	Last Name	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	Address One	<input checked="" type="checkbox"/>	<input type="checkbox"/>

6

Click Refer Someone

Configure Employee Referrals

1

Access the Core tab of Page Options

2

Click the Referrals Edit icon

3

Select Account Creation Form Management fields

4

Create rules for collecting National Identifier

5

Create Duplication Rules and click Submit

6

View your settings on the Refer a Friend screen

Main Menu

CAREER CENTER

My Résumés

Job Search

Referrals

Refer Someone

My Referrals

Offers

New Hire Checklist

Career Development

Referrals

Employees

Search...

Career Center / Referrals / Refer Someone

Refer a Friend

Referrals

Add a Résumé

FIRST NAME *

MIDDLE NAME

LAST NAME *

ADDRESS ONE

ADDRESS TWO

ADDRESS THREE

Fields selected in Step 3 display on the screen
All rules you created in steps 4 and 5 will apply to referrals

6

Click to scroll down and view additional fields

Configure Employee Referrals

1

Access the Core tab of Page Options

2

Click the Referrals Edit icon

3

Select Account Creation Form Management fields

4

Create rules for collecting National Identifier

5

Create Duplication Rules and click Submit

6

View your settings on the Refer a Friend screen

ADDRESS THREE

COUNTRY *

ST/PR

CITY

ZIP/POSTAL CODE

COUNTY

SSN ⓘ

This is an encrypted field.

MOBILE PHONE NUMBER ⓘ

E-MAIL *

CONFIRM E-MAIL *

This concludes the Configure an Employee Referral click-thru