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Description of document:	Peace Corps DOVE (the Database of Volunteer Experience) 1.0 System Manual, 2012
Requested date:	2017
Released date:	07-August-2017
Posted date:	15-January-2018
Source of document:	Freedom of Information Request FOIA Officer U.S. Peace Corps 1111 20th Street, NW Washington D.C. 20526

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Since 1961.

August 7, 2017

RE: FOIA Request No. 17-0144

This is in response to your Freedom of Information Act (FOIA) request. Specifically, "I request a copy of the user manual for DOVE/PCVDMBS."

We have material which is responsive. Attached, please find a copy of "DOVE System Manual" (319 pages). No material has been withheld. It is provided to you at no cost.

If you are not satisfied with this response, you may administratively appeal within 90 business days of your receipt of this letter. The appeal should be addressed to William L. Stoppel, Acting Associate Director – Management, Peace Corps, 1111 20th Street NW, Washington, DC 20526. Your appeal must include the FOIA request number and a statement explaining what you are appealing. It is possible to submit the appeal by U.S. mail (see above) or fax or email. Note that our fax number is 202-692-1385 and email is [foia@peacecorps.gov](mailto:foia@peacecorps.gov). Also, however you submit the appeal, "Freedom of Information Act Appeal" should be clearly marked on the appeal letter and envelope, or the email subject line, or the fax cover sheet.

If you have any questions regarding this response, please contact Candice Allgaier, FOIA/Privacy Act Specialist, at 202-692-1904 or [foia@peacecorps.gov](mailto:foia@peacecorps.gov).

Sincerely,

Denora Miller  
FOIA/PA Officer

Attachment



# **DOVE 1.0 System Manual**

**U.S. Peace Corps**

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# Document History

Date	Version	Description	Author
12/22/11	1.0	This version includes Peace Corps processes and customizations.	A-Tech/Peace Corps PMO
02/17/12	1.1	<i>This version includes revisions of text based on DOVE 1.0. Some changes to content, order of chapters and updated screenshots.</i>	
		<i>(version 2.0 would be updated when system changes or training dictates the manual to change after training occurs from user feedback).</i>	



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## Chapter 1 – Introduction to DOVE

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### Section 1.1: What are VDS, DOVE and MAXx?

The Volunteer Delivery and Support System (VDS) encompasses all of the systems and related processes that are required to manage:

- Outreach to potential candidates
- Recruitment of candidates
- Evaluation (professional, legal, and medical) of candidates
- Placement of candidates
- Support (professional and medical) of Volunteers
- Return of Volunteers and continued support

DOVE (the Database of Volunteer Experience) and MAXx (the Medical Applicant Exchange) are two pieces of software that support VDS. They focus on the processing of Peace Corps candidates from the time they apply to when they arrive at post for pre-service training. DOVE manages the outreach, application, recruitment, placement, legal and staging functions, and MAXx supports the applicants' pre-service medical screening and support.

DOVE is built on a suite of software products provided by Kenexa, a global company that offers a variety of IT tools to deliver solutions for recruiting, hiring and retaining talent. MAXx is hosted internally at Peace Corps and is built using Microsoft Dynamics' CRM tool. Both systems integrate with each other and with other Peace Corps IT systems in order to keep the information about candidates in sync.

### Section 1.2: Purpose

This manual provides the information required to use DOVE to recruit and process candidates. A separate manual covers the use of MAXx.


The components of DOVE included in this manual are:

- Lead and Campaign Management (2X Social Source)
- Trainee Requisition Creation and Management (2X BrassRing)
- Recruiting, Legal and Placement processing (2X BrassRing)
- Candidate Portal (2X Onboarding)

DOVE is user-based and not all users have access to each of the components. Users will only need to reference those sections of the manual that are relevant for their jobs. The manual also focuses primarily on the processing of a standard candidate although several chapters are dedicated to processing non-standard applications such as married couples and Masters International candidates.



## REVIEW

- This manual focuses on DOVE. While MAXx may be referenced in certain sections, it is not detailed in this manual.
- There are many functional roles within DOVE. This impacts their user type and their user privileges.
  - ✓ For this manual, the focus is on user types including: Recruitment, Placement, Staging, Post, and Country Desk (Regions).
  - ✓ Other users like Public Affairs, Legal, and Support may also find information in this manual useful.
- Throughout the manual you will see the red light bulb symbol. 
  - ✓ This indicates an important tip. Look for these throughout the manual for helpful hints on DOVE, the system and candidate process.



## Chapter 2: Getting to Know the Candidate Process in DOVE

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The candidate process involves all of the aspects of requisitions (reqs), candidates, and human resource (HR) statuses. This process is what drives the Candidate from “Applicant” to “Volunteer.” DOVE has taken the candidate process and streamlined it to maximize the agency’s goals. By merging many aspects of the candidate process to one system, users now can track and monitor the process with respect to their functional role.



If you “own” the process, you “own” the system. The DOVE Candidate Processing involves many parts. By learning the correct order and relationship of reqs, HR Statuses, and additional processes, learning or “owning” the system is possible.

In DOVE, reqs are used to manage workflow, as well as to move/copy a Candidate to the next HR Status. Getting to know the HR statuses, reqs, and additional processes allows you to get to know the process and in turn the system.

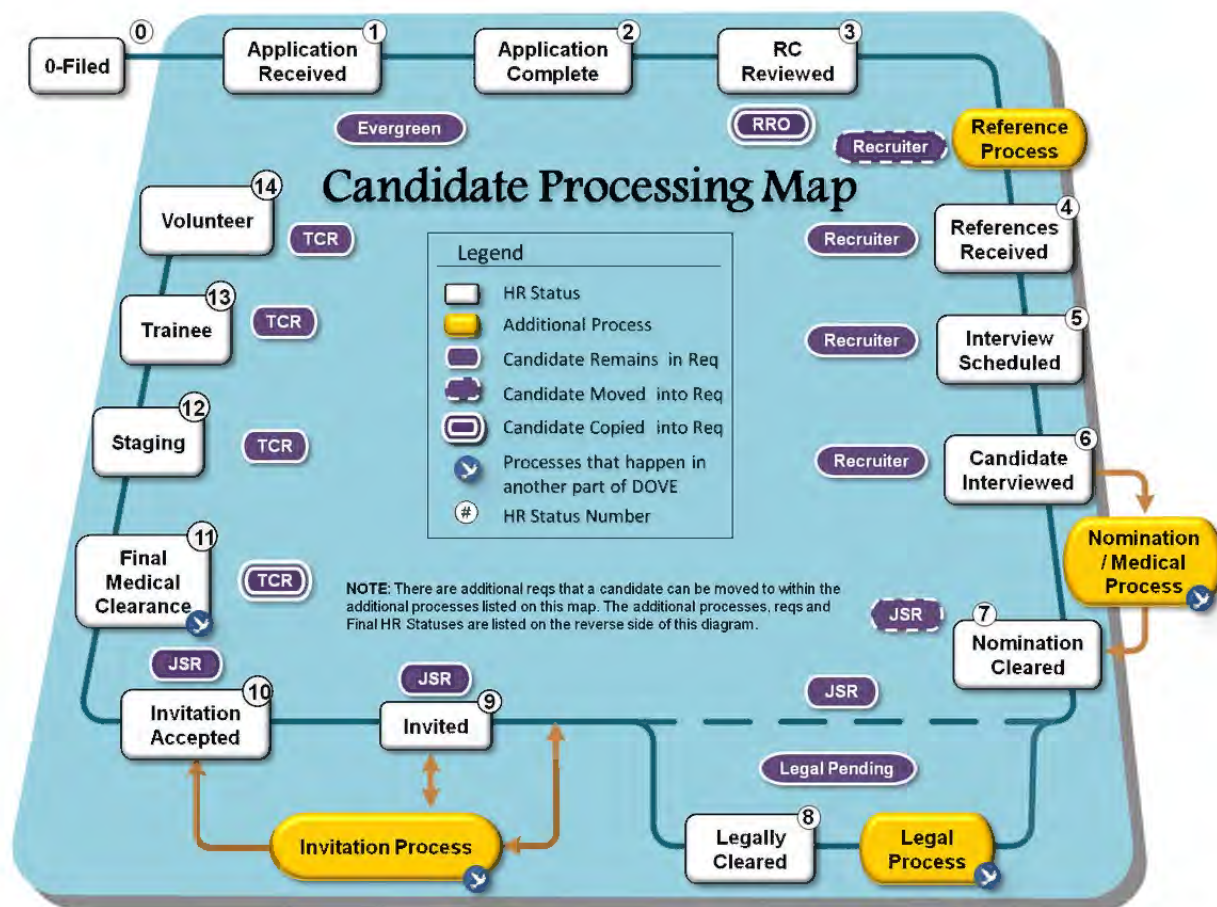
This chapter reviews the following aspects of the process:

- Candidate Processing
- Candidate Processing Map
- Candidate Processing Narrative



## Section 2.1: The Candidate Processing Map

The chart below represents the ideal path a general Peace Corps Volunteer (PCV) Candidate will undergo to move from being an applicant to a Volunteer.



The map above offers a 50,000 foot view of the candidate process.

There are five elements to the candidate processing map:

- HR Status
- HR Status Number (white numbers)
- Additional Processes
- Req
- Processes that happen in another part of DOVE

**HR Status:**

The white boxes represent the HR statuses. In DOVE, there are fifteen HR statuses that are part of this map (see below summary table of all HR statuses). HR statuses indicate where the Candidate is in the process.

**HR Status Number:**

The white numbers indicate the HR Status of the Candidate. The numbers show the logical sequence of the general applicant through the HR statuses.

Below is a breakdown of the HR statuses by functional role.

**Summary Table: HR Status and Functional Role**

HR Status 	HR Status	Functional Role	Auto or Manual*
0	0-Filed	System/Recruitment	Auto
1	Application Received	System/Recruitment	Auto
2	Application Complete	Recruitment	Auto (via integration with MAXx)
3	RC Reviewed	Recruitment	Manual
4	References Received	Recruitment	Auto
5	Interview Scheduled	Recruitment	Manual
6	Candidate Interviewed	Recruitment	Manual
7a	Nomination Validation Required	Determined in MAXx (Recruitment views status and manually changes the status)	Manual
7b	Nomination Medical Pending	Determined in MAXx (Recruitment views status and manually changes the status)	Manual
7	Nomination Cleared	Determined in MAXx (Recruitment views status and manually changes the status.)	Manual or Auto (via integration with MAXx)
8	Legally Cleared	Determined by Legal Eligibility (Placement and Legal view and track).	Manual
9	Invited	Placement	Manual
10	Invitation Accepted	Placement	Auto (via e-link)
11	Final Medical Clearance	Determined in MAXx (Placement and Staging views)	Auto (via integration with MAXx)
12	Staging	Staging	Manual
13	Trainee	Staging	Manual
14	Volunteer	Post	Auto via integration with PC systems
**	Completion of Service	Post	Auto via integration with PC systems


\*Note: This table depicts which statuses are changed by the system (auto) or by a user (manual) during the candidate processing. Additionally, those in the table without numbers are represented in Appendix B, Additional Processes.

\*\* Note: This is a final HR Status. It will be discussed in greater detail in Chapter 7, Working with HR Statuses.







### Additional Processes:


The yellow boxes  represent additional processes. In the map, there are four additional processes. These processes are the Reference Process, the Nomination/Medical Process, the Legal Process, and the Invitation Process. See Appendix B to learn more about these additional processes.


### Reqs:

The purple ovals  represent the reqs. There are several types of reqs in DOVE. Reqs represent types of candidate processing, workflow, and holding pools for candidates while they are processed.

Candidates are copied, moved, or remain in their req during candidate processing. Each req symbol is outlined with a different border to indicate what action is being performed.

A single line, such as , indicates that the “Candidate Remains in the Req.”

A dashed line, such as , indicates that the “Candidate has Moved into the Req.”

A double line, such as , indicates that the “Candidate has been Copied into the Req”.


The reqs used in the general applicant candidate processing include:

- Evergreen Req (Peace Corps Volunteer)
- Regional Recruitment Office Req (RRO) (See Appendix C for all RROs)
- Recruiter Req
- Medical Pending Req
- PCV Job Specific Req (JSR)
- PCV Legal Pending Req
- Training Class Req (TCR)

PCV Married Couples Req and PCV Master's International represent non-standard candidate processing types. They are discussed in Chapters 19-20, Non-Standard Processing Master's International Req and Married Couples Req.

### Processes that happen in another part of DOVE:

These other reqs and processes, like the Nomination/Medical Process that touch another part of DOVE (MAXx) are indicated with their own symbol.

- This is indicated in the candidate processing map by the DOVE with the blue circle. 
- The Nomination/Medical Process, the Legal Process, and Invitation Process all involve another system's information.
- Additionally, it is important to note that the HR Status - Final Medical Clearance also involves the medical system (MAXx).



## Section 2.2: Candidate Processing Narrative:

Before the Candidate applies to become a Peace Corps Volunteer (PCV) the Post, Country Desks (Regions), and Placement offices work together to develop the PCV Job Specific Requisitions (JSR) needed for that fiscal year and quarter. Post creates the JSRs in DOVE, which are then routed for Regional Approval and then VRS Approval. Once approved, Placement is the only office that can edit and open the JSR to be filled by nominated candidates (See Chapter 5, Managing Requisitions).

As a Candidate applies to the Peace Corps, they are automatically entered into the system as 0-Filed (status internal to the system). Once they complete their application, their HR Status is automatically changed to Application Received and once the Candidate's Health History Form is returned to MAXx, their HR Status automatically changes to Application Complete. These three HR Statuses all occur in the Evergreen Req. The Evergreen Req serves as the holding pool for candidates as they go through the initial application submission process (See Chapter 4, Getting Started, When to Copy and When to Move).

Those candidates with HR Status-Application Complete in the Evergreen Req, then are copied into the Regional Recruiting Office Req (RRO).

Those candidates with an HR Status of Application Complete then appear in the appropriate Regional Recruiting Office (RRO) Req. This req is determined based on the state (or county for California) the candidates entered for their current address in the application. The Recruitment Coordinator reviews all candidates in the RRO Req and if the Candidate meets the minimum qualifications, the Candidate's HR Status is changed to RC Reviewed. Upon status update reference forms are automatically sent to the three recommenders indicated on the application via eLink and the **Candidate's HR Status is then updated to References Sent**. RCs then assign Candidates to a recruiter and move them to the corresponding Recruiter Req.

After the References are completed and submitted, the Candidate remains in the Recruiter Req while their interview is scheduled and conducted. The feedback from the Candidate's interview, their application, Health History Form (HHF) and other applicant assessment forms determines how the Candidate is processed in the Nomination/Medical Process (See Appendix B, Additional Processes, Nomination/Medical Process for steps).

If a recruiter deems a Candidate qualified for the Peace Corps they must review the Applicant Assessment Form to determine which nomination status to select and which countries the Candidate can serve in. The Applicant Assessment Form is auto-filled from the Medical SORT Form which is created via integration with MAXx after the HHF is completed by the Candidate. If the Candidate's nomination status is Nomination Cleared or Nomination Validation Required, the Candidate can be moved to a JSR. If the nomination status is Nomination Medical Pending, the Candidate must be moved to the Medical Pending Req. Once a nomination status is determined, the recruiter will search for an appropriate JSR based on the Candidate's qualifications, availability date, and country list. If a Candidate is moved to the Medical Pending Req, the recruiter must still determine a possible JSR for the Candidate and list this on the Applicant Assessment Form in case the Candidate can be moved into a JSR in the future.

The Legal Process (legal clearance process) begins after a Candidate is nominated. After a Candidate is moved to either a JSR or the Medical Pending Req, the recruiting office mails the Candidate their fingerprint forms and NAC form. These forms are then completed by the



Candidate and mailed back to the Legal Office at HQ. Once the Candidate is at the status of Nomination Cleared, the Candidate appears in the Legal Pending Req and the Legal Eligibility Office can then begin its legal review of the Candidate. This process occurs at the same time that Placement begins its review of the Candidate. But, Placement cannot invite a Candidate to serve until the Legal Eligibility Office has updated a Candidate's HR Status (legal standing) to Legally Cleared (Appendix B, Additional Processes, Legal Process).

Placement works with candidates after they are nominated. Placement works with candidates from HR Status Nomination Cleared or Nomination Validation Required to Invitation Accepted. Placement assesses nominated Candidates and determines who should be invited and who should receive a final disposition (e.g., No Interest PO Reviewed). Placement sends out communications to the candidates inviting them to a specific assignment (see Chapter 12, Communications, PCV Invitation Letter) and works with candidates if they decline their initial invitation. Candidates remain in their JSR during HR Status - Final Medical Clearance (Appendix B, Additional Processes, Invitation Process).

The Staging office works with candidates from HR statuses - Final Medical Clearance to Trainee (when they meet with their training class and then they depart for their host country). Candidates are copied from their JSR to the Training Class Requisition (TCR) once they accept their invitations. (See Chapter 5, Managing Reqs, Creating a TCR).

Candidates become trainees once they are on the ground in their host country. They are then trained on the skills they will need to employ while a Volunteer. Candidates remain in their TCR during their service as a Volunteer. Candidates become a Volunteer after their training is completed. This HR Status is updated via integration with an existing Peace Corps system. JSRs are no longer used once Volunteers requested are filled. TCRs may stay open for years depending on whether there are still active candidates in the TCR (See Chapter 5, Managing Reqs, Req Lifecycle, Chapter 6, Closing a Req, and Appendix D, Req Lifecycles).



As a rule of thumb, most reqs (not all) remain open as long as there are active candidates/Volunteers in the req.



## Chapter 3: Candidate Experience

This chapter reviews the Candidate's experience as they apply to become a PCV. The Evergreen Req is where the initial application information is stored. Candidates create a log-in, apply, and upload documents all through the Candidate site. These masks appear on the Candidate's application landing page.

This chapter focuses on –

- Talent Masks
- Candidate Applications
- Next Steps for Candidates

### Section 3.1: Talent Masks

The Candidate's application status is revealed to them through the Talent Mask. Talent Masks are the external HR statuses that help candidates know where they are in the process. The following table shows how the HR statuses map to the Candidate's view of their application's status in the Talent Masks.

**Summary Table: Talent Masks in DOVE**

HR Status	Talent Mask
0-Filed	n/a (system status)
Application Received	Application and Health History Form Pending
Application Complete	Application and Health History Form Received
RC Reviewed	Application and Health History Form Received
References Received	Application, Health History Form, and References Received
Interview Scheduled	Interview Scheduled
Candidate Interviewed	Interviewed
Nomination Validation Required	Nominated
Nomination Medical Pending	Nominated
Nomination Cleared	Nominated
Legally Cleared	Legally Cleared
Invited	Invited
Invitation Accepted	Invitation Accepted
Declined Invitation	Declined Invitation
No Interest Reassigned	Under Consideration
Final Medical Clearance	Medically Cleared
Staging	Medically Cleared
Trainee	Trainee
Volunteer	Volunteer
Completion of Service	Completion of Service
No Interest RC Reviewed	Withdrawn From Consideration
No interest Interviewed	Withdrawn From Consideration
No Interest PO Reviewed	Withdrawn From Consideration
No Interest Legal Reviewed	Withdrawn From Consideration
Medically Not Cleared	Withdrawn From Consideration
Candidate Withdrawn	Withdrawn From Consideration
Completion of Service	Withdrawn From Consideration
Early Termination	Withdrawn From Consideration
In-Service Death	Withdrawn From Consideration



## Section 3.2: Candidate Application

Candidates can create a profile through a link on the Peace Corps website when they apply to become a Volunteer. This allows the Candidate to save an application and return to complete it at a later time. This also allows the Candidate to return and update information (e.g. e-mail address changes).

When candidates begin to apply, they build an online profile by answering questions. Some of these are standard personal data, including: contact information, education and work experience information. Others are qualifying questions that automatically filter out candidates who do not meet the minimum requirements or eligibility for an assignment. These include being a U.S. Citizen and being at least 18 years old at the time they are ready to serve as a Volunteer. Candidates are also able to upload a resume/CV and other attachments.

**Peace Corps**

About Us Agency Jobs Inspector General Contact Us

**Welcome!**

We appreciate your interest in serving as a Peace Corps Volunteer and look forward to receiving your application. Peace Corps service is a life-defining leadership experience. Since 1961, the Peace Corps has shared with the world America's most precious resource – its people. Volunteers serve in 76 countries in Africa, Asia, the Caribbean, Central and South America, Europe, the Pacific Islands and the Middle East. Peace Corps Volunteers live, learn, and work with a community overseas for 27 months, providing technical assistance in six program areas: education, youth and community development, health, business and information and communications technology, agriculture, and environment. Peace Corps provides Volunteers with language, cross-cultural, and technical training. Please Note: To be eligible for service, you must be at least 18 years of age and a U.S. citizen.

**? Help**

To access your profile and/or Peace Corps application, log in below. If you don't have a profile, [click here to create a new account.](#)

E-mail address

Password

[Forgot your password?](#)

Initially, candidates will be asked a series of qualifying questions. This determines eligibility for serving as a Volunteer. If basic eligibility requirements are not met, the Candidate will receive a message on-screen indicating they did not meet the requirements and the application process is stopped. Those that do not meet the basic requirement are “knocked out” of the application and these individuals’ information is not stored in DOVE. If eligibility requirements are met, the candidate will complete additional questions and upload the appropriate attachments as indicated.

**Peace Corps Volunteer Application**

☒ Expectations ☒ Contact Information ☒ Eligibility ☒ Skills and Experience ☒ Interest and Availability ☒ References ☒ Essay Questions ☐ Attachments ☐ Request for Racial and Ethnic Data ☐ Confirmation ☐ Thank You

**Attachments**

Please provide any applicable attachments. For additional information on required legal documentation and sample notarized letter templates please visit [www.peacecorps.gov/legalinfo](http://www.peacecorps.gov/legalinfo)

**List of Potential Attachments**

1. Marriage Certificate
2. Divorce Decree(s) / Legal Separation documentation
3. Notarized Letter regarding Dependents
4. Notarized Letter regarding Serving Without Spouse
5. Military Discharge Paperwork (DD214)
6. Notarized Letter regarding Student Loans/ Financial Obligations
7. Transcript(s)
8. Master's International Acceptance Letter
9. Licenses / Certificates
10. Other Attachments

**Select files**

You may select previously uploaded files.

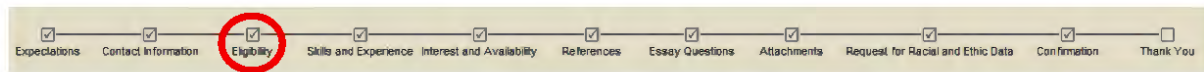
Sample Cover Letter.doc

File 1:





As candidates work through the process, a timeline (also called breadcrumbs) provides them with details as to where they are at in the process.

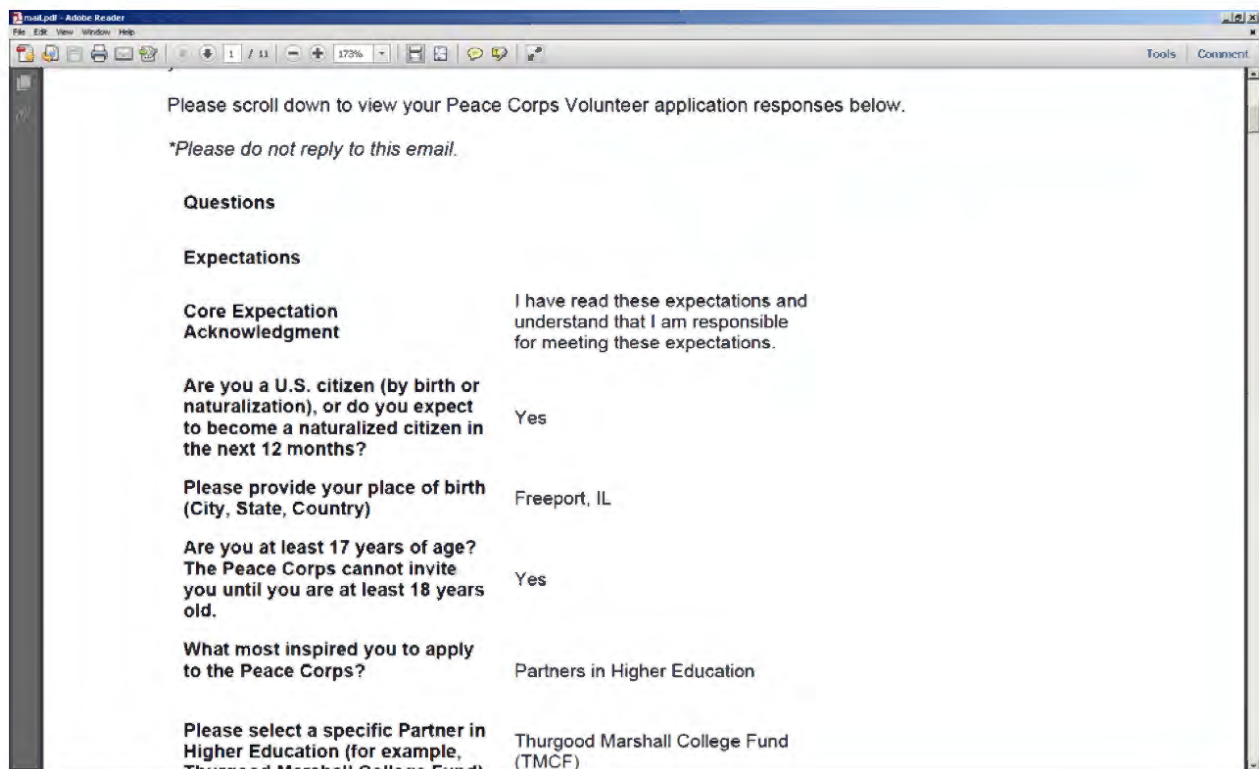


### Section 3.3: Next Steps

Once all required information has been completed and submitted, the Candidate will receive an email notification automatically thanking them for their submission. Once the Candidate receives the confirmation email, they are visible in the Evergreen Req.



This email also contains all the questions and answers that they completed as part of the GQ Job Response (the application) in a pdf (see below).





Throughout the application process Candidates will receive information from Peace Corps staff. They may be contacted (via phone or email) to schedule an interview and may be sent various communications via DOVE. Candidates may also receive forms to complete, which are either automatically generated from the system or manually sent by Recruitment and Placement. Candidates can complete and respond via the eLink embedded in the email. For example, the below image shows the Invitation Letter and how it contains a hyperlink to the PCV Invitation Decision Form (online) for the Candidate to input their decision.

September 20, 2011

Sally Jones  
1109 Carson Street  
Kashyyk, MD 20901

Dear \_\_\_\_\_

Congratulations! It is with great pleasure that we invite you to begin training in Dominican Republic for Peace Corps service. You will be joining thousands of Americans who are building stronger communities around the world. This call to action gives you the opportunity to learn new skills and to find the best in yourself.

The next step is up to you. Please carefully read the enclosed Volunteer Assignment Description, Welcome Book, and other important details about Peace Corps service, including Peace Corps' pre-departure safety and security information located here: [http://multimedia.peacecorps.gov/multimedia/pdf/documents/safety\\_and\\_security\\_highlights.pdf](http://multimedia.peacecorps.gov/multimedia/pdf/documents/safety_and_security_highlights.pdf). Consider the project description and primary assignment duties very carefully when making your decision. In accepting this assignment, you are making a commitment to the project, the country, and the Peace Corps.

Please complete the attached Invitation Decision form within seven days if you decide to accept our invitation. If we do not hear from you within this period, the assignment may be offered to another applicant and your application will be removed from further consideration. If you decide to decline this invitation, you must contact the Placement Office by telephone within seven days at (800) 424-5500, extension 1840. In addition, you must complete a written statement explaining your reasons for declining our invitation. Please note that applicants who decline their first invitation will only be issued a second invitation in exceptional circumstances.

Because your invitation to serve in Peace Corps is contingent upon final medical and legal clearances, it is important that you respond promptly to any requests for further information. If you have questions, feel free to call the Placement Office at (800) 424-5500, extension 1840. The Office of Medical Services (OMS) will email you concerning your physical examination 120 days prior to your Staging/Departure date.

We appreciate your desire to make Peace Corps service a part of your future. We look forward to hearing from you soon.

Sincerely,

Robyn  
VRS/Placement Unit

Enclosures

[PCV Invitation Decision Form](#)

Forms and communications they may receive include (but not limited to):

- Nomination Letter (confirming nomination to either a JSR or the Medical Pending Req)
- Invitation Letter with Invitation Decision Form (once submitted allows Candidate to move from JSR to TCR)
- Next Steps email – (once invitation is accepted informs Candidate of next steps in the onboarding process)
- Staging Letter (once sent informs the Candidate about their registration forms, hotel and travel arrangements).




## Chapter 4 - Getting Started

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Before we begin using DOVE, it is important to dedicate time to learn some basics.

This chapter focuses on the following aspects of DOVE:

- How to Access and Navigate in DOVE
- System Best Practices
- DOVE Best Practices

As we are getting started, note that if you see the red circle with the light bulb this is calling attention to an important tip. Look for this symbol  throughout the document for reminders, tips, and system notes.

### Section 4.1: How to Access DOVE

#### Logging In

DOVE will use a single sign on (SSO) technology that allows Peace Corps users to access DOVE from their single main system login.



If a DOVE user forgets their password, they will need to see their System Administrator to reset their SSO password.

#### Accessing & Using DOVE

DOVE is a web-based application and is accessed through an icon on your desktop.



Because DOVE is a web-based application, please make sure you turn off your browser's pop-up blocker for your DOVE site.

DOVE, as described earlier, is a system to help take candidates from being an applicant to becoming a Volunteer. Foremost, the system involves managing leads, candidates and reqs.

- A lead is a person that is interested in becoming a PCV but has not yet begun to apply. It is important to note that leads are managed in Social Source. Candidates, by comparison, are those persons that have started the application process.
- A lead is a prospective Candidate and a Candidate is a prospective Volunteer.
- A Volunteer is a Candidate that has completed the candidate processing and their initial on post pre-service training.
- A req allows the candidates to be organized and processed, but also indicates a Candidates stage in the process.



It is important to note that while managing reqs and candidates can be done in the same system, HR Statuses should only be changed when viewing candidates in the req output grid (more on this later).





## Section 4.2: System Best Practices

Before we review the system itself, it is important to note several system best practices.



System best practices are those tips that help the user navigate DOVE most efficiently. Choosing the right browser, for example, will help the system run better.

To have the best possible experience when using DOVE, follow these proven best practices:

- For best functionality, use **Internet Explorer** when accessing and working in DOVE.
- Only **single-click** when using DOVE. Double-clicking delays pages from loading and may cause multiple entries.
- **To refresh a page** (Internet Explorer), place the cursor on a blank spot on the page>click the right mouse button>click Refresh. The browser refreshes and returns you to the page you are working on. You can also refresh by...
  - Hitting F5 on your keyboard.
  - Using the Refresh option on the browser menu will return you to the DOVE Dashboard.
- The **Back button** on the browser should not be used. DOVE is a secure website and using the Back button will display a message “Page cannot be displayed.”
- It is best a practice to **always click “OK” buttons** when taking an action in DOVE.
- For **forms and req templates**, it is important to complete the form from top to bottom, as the selection from one field may automatically populate the selections for subsequent fields.



## Section 4.3: DOVE Best Practices



DOVE best practices are those tips that help the user navigate the candidate process most efficiently. These tips help users avoid errors in DOVE that could impact the Peace Corps goals.

- **Always Retain HR Status.** Traditional users of this software solution may want to have the option of retaining or not retaining HR status when they work with the reqs. However, in DOVE, you should always retain HR Status. Retaining the HR Status allows your actions to be saved in the system across multiple Reqs. Changing HR Status is the result of an action in the system, a form being completed, or a Candidate being medically or legally assessed. It is very important to maintain this information across multiple Reqs.
- **Only Make Changes in a Req.** The req helps organize the candidates based on the HR Status and where they are in the candidate process. Whereas the candidate and req output displays look similar and perform similar actions, you must only change the HR Status when in a Req. The candidate output grid allows you to access the Talent Record, review candidate information, forms, correspondence, and helps decide where a candidate should be placed. However, no actions should be taken to change HR Status within the candidate interfaces.
- For **approval routing**, we recommend adding a message so the req owner will have information on what is necessary in order to have the req continue through the process for approval. If the req is declined, the approval process is immediately halted.
- **When to Copy vs. When to Move.** To perform the two key functions of the system—managing reqs and candidates—you have to know when to Copy and when to Move correctly so that the candidate processing is performed accurately. Copying and moving processes refer to when you make a change to req type. See the table below to help guide you on when to copy and move.



The majority of copying and moving actions are done by the Recruitment and Placement user types, from Application Complete to Invitation Accepted (HR statuses), so it is especially important for Recruitment and Placement staff to learn this logic.

The below table helps show the logic of why a Candidate would be copied, moved, or remain in their current req.



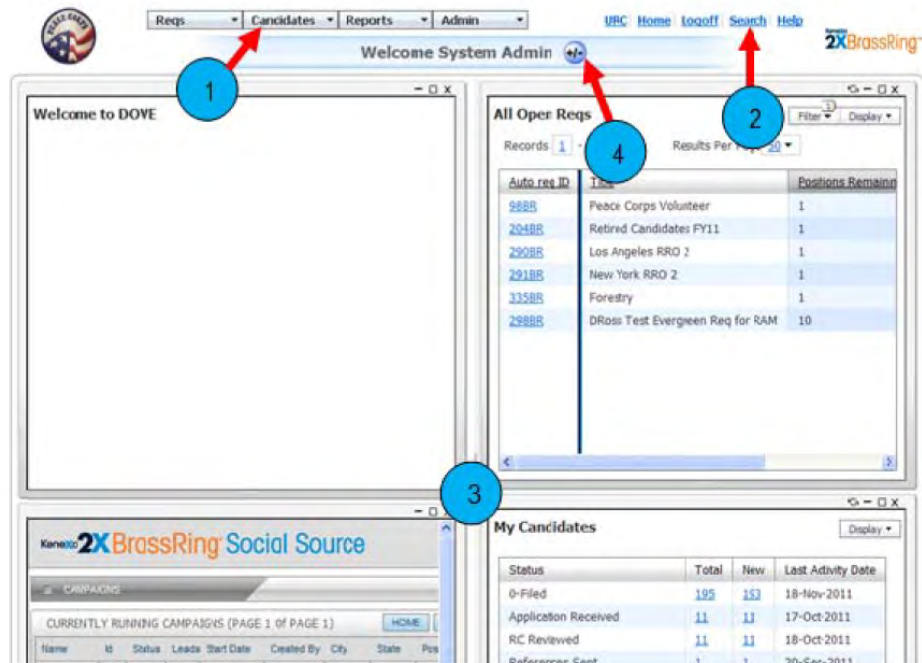
## Summary Table: When to Copy and/or When to Move

Current Req	Action	Why?	Who?
Evergreen	Copy into RRO	Copying in this case allows the Candidate to be placed in the RRO Req corresponding with their current address while retaining a copy of the applicant information in the Evergreen Req. Just as evergreen trees remain green in winter, the candidate's information remains stored in the Evergreen Req during their entire processing.	System
Regional Recruitment Office (RRO)	Move into Recruiter Req	Moving in this case allows the candidate to be assigned to a specific Recruiter in that RRO.	Recruitment
Recruiter	Remain in Recruiter Req	Remaining in this case allows the candidate to stay in the Recruiter Req during the reference, interview, and nomination medical process.	Recruitment
Recruiter	Move into JSR	Moving in this case allows the candidates whose status will change to Nomination Cleared or Nomination Validation Required to advance to the next part of the process. Those that will be nominated with the status of Nomination Medical Pending will be moved into the Medical Pending Req not the JSR (see Additional Processes – Nomination/Medical Process)	Recruitment
JSR	Visible in Legal Pending Req	Candidates are copied into the Legal Pending Req upon applying to Peace Corps. Once a Candidate is nominated, they are visible in Legal Pending Req. This allows the Candidate to remain in the JSR for Placement to continue to work, while the Legal office works to determine legal eligibility (legal clearance). Once legal standing is cleared, then HR Status can change to Legally Cleared and Candidate is ready to be invited.	System
JSR	Remaining in JSR	Remaining in this case allows the candidate to stay in the JSR during the placement screening process.	Placement
JSR	Copied to TCR	When a Candidate accepts their invitation, they are copied into the corresponding TCR. Copying to in this case allows the number of placed candidates in the JSR to be tracked (to ensure the right numbers of nominations are filled). The HR Status of Invitation Accepted is what triggers this movement to the TCR.	Placement
TCR	Remains in TCR	The HR Status of Final Medical Clearance allows the candidate to be prepared to be staged and sent to their Post. The Candidate remains in the TCR Req from Staging until they complete their service as a Volunteer.	Placement



## Section 4.4: The DOVE Dashboard

When you access DOVE, you are presented with the DOVE Dashboard. The panels and menu actions reflect the access level within DOVE, which is assigned by user type.



1	The <b>top toolbar</b> allows you to access various system functions, such as creating requisitions, searching candidates, and basic reporting.
2	The <b>links</b> to the right of the top tool bar provide access to the following: <ul style="list-style-type: none"><li>• <b>URC</b> – access to online help resources</li><li>• <b>Home</b> - allows you to return to the DOVE dashboard</li><li>• <b>Logoff</b> – allows you to logoff DOVE</li><li>• <b>Search</b> – allows you to conduct “quick” searches for candidates or requisitions</li><li>• <b>Help</b> – allows you to access page-specific help information.</li></ul>
3	<b>Panels</b> are framed content that appear in your DOVE Dashboard. They are configured according to user type, so the information that appears is configured for your job function. They can be adjusted or repositioned by dragging and dropping the panels. They can be minimized, maximized, and refreshed using the icons located in the right-hand corner of each panel.
4	The <b>plus/minus icon</b> allows you to add or remove panels from your DOVE Dashboard.

Pages within DOVE offer context-sensitive information. This means the help you display pertains to the page you are on or the action you wish to take.

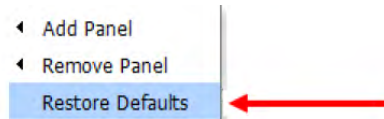


## Section 4.5: Setting up your DOVE Dashboard

It is important to possess some initial knowledge about how to set up your DOVE Dashboard. The plus/minus button allows you to set up the panels according to your user access type.


### To set-up your system dashboard according to user defaults:

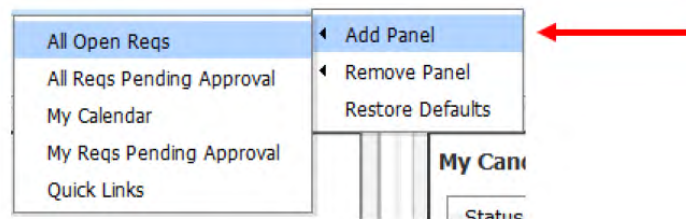
1. Click the +/- icon. 
2. Scroll down to Restore Default option and Click this.



3. This will set up your DOVE Dashboard based on the pre-selected defaults for your user type.

### To add a panel:

1. Click the plus/minus sign. 
2. Scroll down to the panel you would like to add.
3. Click the panel name and it will appear.



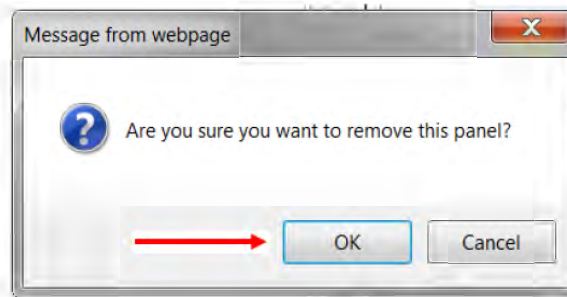


**To delete a panel:**

1. Click the "X" in the upper right panel.



2. See the system prompt pop-up: Are you sure you want to remove this panel?"



3. Select "OK" to the system prompt.

For more information on panels and your dashboard, go to Chapter 16, Advanced Set-up of the DOVE Dashboard.



## Section 4.6: Help

If at any point in the system you need help, refer to Appendix F, How to Get Help.

### *Test Your Knowledge*

Answer the following questions “True or False”?

1. The top toolbar located at the top of the DOVE Dashboard allows you to set your user type privileges.
2. Search allows you to conduct “quick” searches for candidates and requisitions
3. The plus/minus icon on the DOVE Dashboard allows you to quickly open a new DOVE session.
4. The Back button (in the browser) may cause an error message to be displayed.
5. When moving a Candidate into a JSR, their HR Status is RC Reviewed.



## Chapter 5: Managing Requisitions

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A requisition is commonly referred to as a “req” within the system. A req is the main vehicle used to view, organize, and update HR statuses for candidates. Generally speaking, reqs are created by Post in the case of PCV Job Specific Reqs (JSR), and Country Desks, in the case of Training Class Reqs (TCR). Recruitment and Placement copies and/or moves a candidate through reqs. Staging uses the TCR to organize the candidates before they are staged and sent to their host country. This description is not all inclusive, but offers some insight into the process.

This chapter focuses on –

- Components of Reqs
- Req Lifecycle
- Creating Reqs
- Approval Routing
- Opening a Req
- Viewing Reqs



It is important to remember that “you work in reqs.” Req folders and output grids (displays) are where changes are made to the Candidate’s HR Status.

### Section 5.1: Components of a Req

A req is created by first filling in a req form. A req form can include the following:

- Request type
- Title
- Description
- Owner
- Manager
- Location (i.e. Post, Region, Sub-region)
- Number of Volunteers Requested/Limited for the req
- Candidate Processing Timelines (i.e. staging and invitation deadlines)
- Req Team (who approves the req)
- Other req specific fields (the form’s content varies depending on what type of req is being created)



Some reqs are more complex than others. JSRs incorporate assignment area (AA), timelines, approval routing, and information inputted by several different users. Whereas the Recruiter Req or RRO Req is based on more stable staffing or office information that does not require as many fields to be entered before it is created.





## Section 5.2: Types of Reqs

There are three types of candidate processing and two types of reqs. A Candidate can either be processed as a Peace Corps Volunteer (PCV), Married Couple, or Master's International applicant. Reqs are either workflow or holding pools for candidates.

### Candidate Processing Types:

Candidate processing types are those that indicate which type of Peace Corps Volunteer the Candidate is pursuing in their Peace Corps application. It is important to recognize candidate processing types within this section on reqs because candidate processing type impacts the reqs a Candidate will pass through while being processed.

Below are the main types of candidate processing:

- **Peace Corps Volunteer (PCV)** – This type is considered the general applicant. These candidates are organized through the general applicant workflow seen in the Candidate Processing Map.
- **PCV Master's International** (pursuing a Master's degree while serving as a Volunteer) – these candidates must be put into a Master's International Req before they can be in their JSR and then copied into their TCR (see Chapter 18, Non-Standard Reqs, Master's International Req for more info)
- **PCV Married Couples** (serving together) – these candidates must be put into a Married Couples Req before they can be in their JSR and then copied into their TCR. (see Chapter 19, Non-Standard Reqs, Married Couples Req for more info)

Whether someone is a general applicant, Master's International applicant, or Married Couple applicant, impacts how they are processed and correspondingly the workflow route they take within the reqs. Candidate processing type can add one req or more to a Candidate's workflow.



PCV General Applicant's are the most common type of candidate processing. These candidates' are represented in the Candidate Processing Map (See Chapter 2, Candidate Processing). For Master's International and Married Couples processing, see Chapters 18 and 19.

### Workflow:

Workflow within the reqs for a general applicant is detailed in the Candidate Processing Map. Typical workflow involves a Candidate being moved and copied multiple times throughout the candidate process. Part of that workflow includes the Medical Pending and Legal Pending Reqs. These reqs allow the Candidate to be processed while they are medically and legally evaluated. In these cases, some reqs can serve as workflow and holding pool reqs. These reqs can be deal breakers for a Candidate's processing, for example, if a personal issue deems them ineligible (ending the process). These reqs may also elongate a Candidate's processing time if an issue needs more attention (e.g. Candidate remains in Medical Pending Req (as a holding pool) while more information is submitted).



## Holding Pools:

When a Candidate enters the system and is put in the Evergreen Req, their application is copied there to remain in the system while it is processed. Holding pool reqs are those that store a Candidate during processing. These differ from workflow in that the Candidate may remain in this req for an extended period of time (Medical Pending Req, Master's International Req, etc) while an issue or JSR is being created to allow the Candidate to advance.



These reqs are not to be confused with requisition (req) folders. Req folders are the icons in the system that represent a req and allow users to access to candidates. There is more information on req folders in Chapter 8, Managing Candidates.

## Summary Table: Types of Req's in DOVE

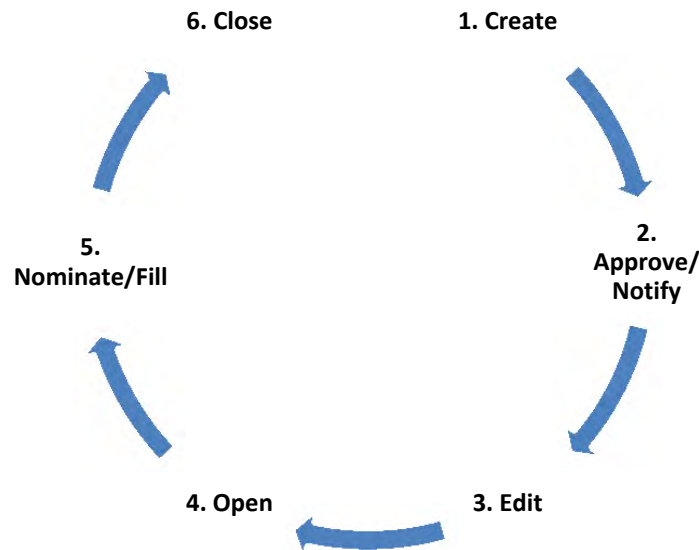
Req Name	Req Type	Functional Role	Definition
Evergreen Req	Holding Pool	<ul style="list-style-type: none"> <li>Created by Recruitment</li> </ul>	This is created one-time by Recruitment and is always open, allowing persons to start the application process. This is the only req that is posted to the Talent Gateway. This req also maintains the Candidate's original application for records purposes.
Regional Recruitment Office (RRO) Req	Holding Pool	<ul style="list-style-type: none"> <li>Created by Recruitment</li> </ul>	This req allows the candidates to be sorted into the right regional recruitment office. The Candidate is only briefly in this req before they are assigned to a specific recruiter.
Recruiter Req	Workflow	<ul style="list-style-type: none"> <li>Created by Recruitment</li> </ul>	This req is created as new recruitment staff is hired. The Recruiter Req allows the Candidate to be assigned to a specific Recruiter as they move through the candidate process from application to nomination.
PCV Job Specific Req (JSR)	Workflow	<ul style="list-style-type: none"> <li>Created by Post and Placement</li> <li>Regional (Country Desk/Regions) and VRS (Placement) approvals.</li> </ul>	Created for specific assignment areas, such as Forestry, General Construction, Agricultural. These are created by Post, completed by Placement and used throughout the volunteer recruitment process. Only a limited number of candidates can be moved into each JSR.
PCV Legal Pending Req (Legal Pending Req)	Workflow/Holding Pool	<ul style="list-style-type: none"> <li>Legal</li> </ul>	Every Candidate will go through the Legal Pending Req as they are being legally processed. The Candidate appears in the Legal Pending Req at the status of Nomination Cleared by an automatic process so that the Legal office can review their information while Placement continues to review the Candidate.
Medical Pending Req	Workflow/Holding Pool	<ul style="list-style-type: none"> <li>Created by Placement</li> </ul>	Those candidates that require additional information from a doctor or have a complicated medical issue are put into the Medical Pending Req until the issue is clarified. These reqs are created by Placement.
Retired Candidates Req	Holding Pool	<ul style="list-style-type: none"> <li>Recruitment</li> </ul>	Candidates that are dispositioned for any reason are put into a Retired Candidates Req.
PCV Married Couples Req (MCR)	Holding Pool	<ul style="list-style-type: none"> <li>Created by Placement</li> </ul>	Created by Placement to manage candidates who would like to serve in the same country as their spouse. These candidates are eventually placed into the same TCR before they depart to their host country. Only a limited number of candidates can be moved into each MCR
PCV Masters International Req (MI Req)	Holding Pool	<ul style="list-style-type: none"> <li>Created by Placement</li> </ul>	Created by Placement to manage Master's International Candidates. Because they are nominated so far in advance, Master's International (MI) candidates are held in the MI Req until the corresponding JSRs are opened.
Training Class Req (TCR)	Workflow/Holding Pool	<ul style="list-style-type: none"> <li>Created by Country Desk (Regions)</li> <li>Updated by Placement</li> </ul>	Created once all JSRs for a particular country in a specific quarter are created and approved. . Used by Placement. Viewed by Staging, Regions and Post.



## Section 5.3: Req Lifecycles

A req typically goes through at least three different stages: pending, open (and posted), and closed. This 3-stage lifecycle relates to how the system treats the req. The PCV recruitment process is not a typical recruitment process, so the req lifecycle is more involved.

A typical req lifecycle for DOVE includes:



1. **Create:** A req is first created with the req form. The req creator opens and begins to fill in the correct form.
2. **Approve/Notify:** Next, the req creator designates approval or notification team on the req form (some require formal approval routing, while others do not require a formal approval process). Even if a req does not require approval routing, it does require certain parties be notified upon approval.
3. **Edit:** Then, it allows users to review and edit the req (add content, revise deadlines, etc). Editing is dependent on user type.
4. **Open:** Once approved and revised, the req is ready to be opened. Opening the req allows users to start viewing and working with the req. JSRs are opened on a quarterly basis.
5. **Nominate/Fill:** The most active step involves nominating or filling the req. This can involve information from multiple departments or can simply be moving one candidate from req to req (workflow req).
6. **Close:** Finally, once the req has no more active candidates/Volunteers inside it, the req is closed.

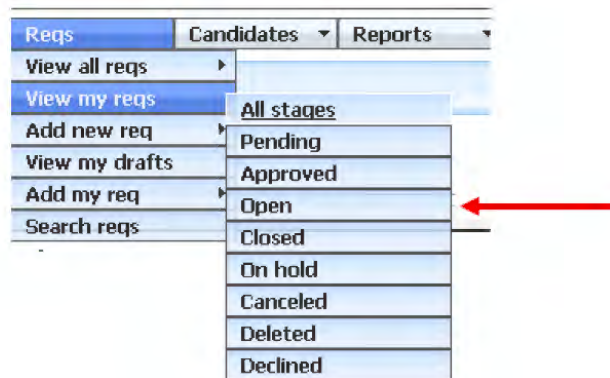


## Section 5.4: Navigating Reqs

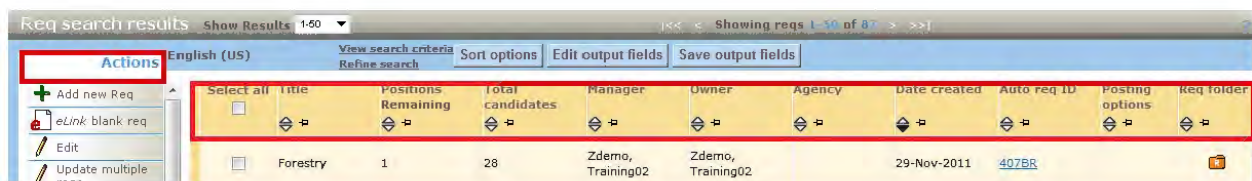
Users can navigate to the reqs by:

### Req Tab

1. Use the **Reqs tab** to browse the reqs at different system stages;(available view is dependent on user type) or,



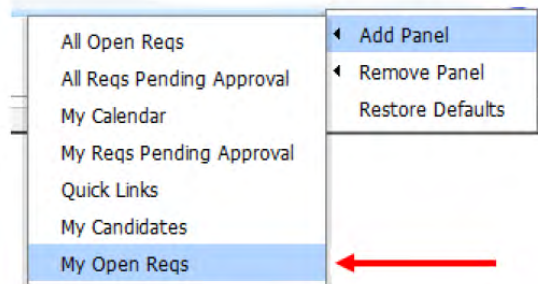
2. Navigating to reqs this way offers the advantage of going to a req output grid. The req output grid is where you can take actions on reqs and candidates.





## Use the My Open Reqs panel on the DOVE Dashboard:

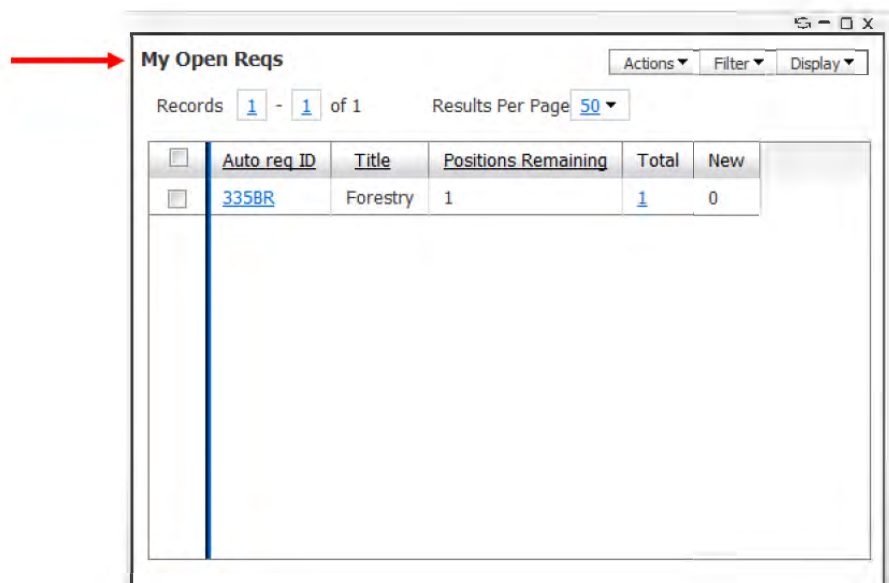
1. First make sure that panel is available. If not on your DOVE Dashboard, add the panel (see below) (Available panels are dependent on user type.)



2. The added panel will display the user's assigned open reqs. This way offers the advantage of viewing and tracking your reqs.



Although changes can be made from this panel, the best practice is to make changes from the top toolbar. Working through the top toolbar insures you are working in the correct output grid and therefore significantly reduces the risk of processing errors.



The preferred way to access the reqs is to go to the top toolbar and scroll down to **View My Reqs < Open**. This will take the user to the appropriate req output grid to take actions on these reqs.



## Section 5.5: Creating a Req

Creating reqs involves several steps. It is important to note what creating each req means to the candidate process.

- Creating the **Evergreen Req** allows candidates to apply to Peace Corps and for their information to be preserved for the process.
- Creating the **RRO Reqs** allows the candidates to be sorted into the right Regional Recruitment Office depending on their geographic location.
- Creating a **Recruiter Req** allows the candidate to be assigned to a specific recruiter so they can be interviewed, reviewed (references and medical) and cleared for nomination.
- Creating the **JSRs** begins the candidate process from the Peace Corps side, allowing positions to be reviewed, opened, and filled by Peace Corps staff.
- Creating the **Medical Pending Req** allows candidates that need additional medical follow-up to be organized while Medical conducts additional review.
- Creating the **Legal Pending Req** allows candidates to be legally evaluated while still remaining in the JSR.
- Creating a **Master's International (MI) Req** Allows MI candidates to be sorted separately.
- Creating a **Married Couples (MC) Reqs** allows recruiters to nominate spouses who may later be copied in two separate JSRs to serve in the same TCR and host country.
- Creating the **TCR** begins the candidates' journey towards Staging and pre-service training.

Some reqs are created and updated infrequently. They involve updating staffing lists or renewing a req that serves as a holding pool (e.g. Evergreen Req) to be used in the next fiscal year. For JSRs and TCRs, however, this involves significant coordination and awareness of the candidate process.

The req that requires the most involvement and coordination is the JSR, as it drives the candidates' selection and placement. For reference, we will walk through creating a standard JSR and TCR. The non-standard reqs, like Master's International and others will be addressed in later chapters.



## Section 5.6: Creating a JSR

When creating a JSR, the req process involves the following:

- Developing and identifying the requirements
- Determining the Req Team (who is notified)
- Approving the Req (determine approvers and routing; 2-levels of approvals)
- Opening the Req (quarterly)
- Viewing the Req
- Closing the Req

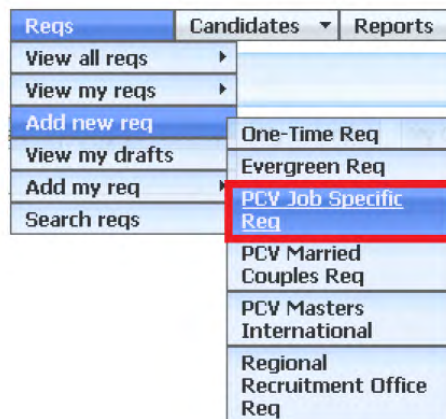
Post and Country Desk (Regions) work together to create the req's requirements. Country Desks, as they are located at Peace Corps headquarters work with Placement on the approval process. The ChPT is the first level of approver for this process ("Regional Approval"). Placement is the second level approvers ("VRS Approval"). Placement is also responsible for reviewing the JSR and adding in additional information (e.g. the nomination caps for each JSR). Once it is reviewed and approved, the JSR is opened and ready for it to be viewed and used by recruiters.



While JSRs are created by Post, they are not operational until Placement approves and opens them (quarterly). Candidates cannot be put into a JSR until the req is opened by Placement.

### Steps to Creating a JSR Req Form

1. Click **Reqs / Add new req**/Select the appropriate req to be created from the req sub-menu.







- The **Select Request Type** page appears. Use the drop-down arrow to see a list of job specific types or click the Selection details link to see the complete table. Click **Continue >>**.

Step 1: Select Request Type

Depending on the req template selected, options in this menu will vary from one choice to many.

- On the **req form**, you must enter information for all required fields, which are noted with a **red asterisk**. It is a best practice to complete the form from top to bottom, as the selection for one field may automatically populate the selections for subsequent fields.



Use the scroll bar to view and complete the entire req form.

When you create a req, every type of req involves filling in a req form. The differences from one req to another depends on the available fields, user type, department, etc. The table below provides an overview of fields on the JSR that are noted with a red asterisk and are required to be completed. Not all fields below will be on every req template used by Peace Corps. For example, TCRs will have training allocation information that would be completed, while a JSR does not.







## Summary Table: Fields in a JSR Req Form

Req Fields	Key Information	Notes
<b>*Request Type</b> <i>Required for all reqs being created</i>	Automatically populates the Request Type field based on the selection in the drop-down menu. Information is read-only. The Request Type cannot be edited. Example: 100 100-Forestry.	Example: 100 100-Forestry.
<b>*Title</b> <i>Only auto-populates on JSR. All others free text</i>	Automatically populates the Title field based on the Request Type selected. Text can be edited.	Post creates the title
<b>*Description</b> <i>Auto-populates for JSR</i>	Automatically populates. This field can be edited.	n/a
<b>*Owner</b> <i>Required for any req being created</i>	The initial creator of the requisition is entered in this field. Use the drop-down menu or click Selection details to complete the selection.	Determined by Post
<b>*Manager</b> <i>Required for any req being created</i>	Select the Placement staff person accompanying "Owner" as the "Manager" Use the drop-down menu or click Selection details to complete the selection. <a href="#">Expanded view</a>	Determined by Post
<b>*Volunteers Requested</b> <i>Required for any req being created</i>	Select the number of Volunteers needed for this Assignment Area (AA). The system default is 1 and can be edited.	Determined by Post
<b>*Region</b> <i>Required for JSR only</i>	Select the region from the drop-down menu or selection details link. Selection choices will be Africa, EMA and IAP.	Determined by Post
<b>*Sub-Region</b> <i>Required for JSR</i>	Select the sub-region based on the filtered list of countries based on the overall region.	Determined by Post
<b>*Post</b> <i>Required for JSR</i>	Select the Post which indicates the assignment location. The Region selected will determine the choices available to select for the Post field.	Determined by Post
<b>Number of Nominations Needed</b>	Input the number of nominations based on need. Inputted by Placement.	Not required to create the JSR, but required to open the JSR. This is determined by Placement.
<b>Candidate Limit Status</b>	Select Unfilled.	Not required to create the JSR, but required to open the JSR. This is determined by Placement.
<b>*PST Start Date</b> <i>Required for JSR</i>	The PST Start Date indicates the date that Pre-Service Training begins for this assignment. Use the drop-down arrows to select a date, or click the calendar icon to select the date. 	Determined by Post
<b>Fiscal Year</b>	Select appropriate fiscal year.	Determined by Post
<b>Fiscal Quarter</b>	Select appropriate fiscal quarter.	Determined by Post
<b>Last Nom Date</b>	The Last Nom (Nomination) Date indicates the projected last date that someone can be nominated to this JSR. Use the drop-down arrows to select a date, or click the calendar icon to select the date. 	Not required to create the JSR, but required to open the JSR. This is determined by Placement.



Req Fields	Key Information	Notes
<b>Invitation Deadline</b>	The Invitation Deadline indicates the projected deadline for inviting candidates to this JSR. Use the drop-down arrows to select a date, or click the calendar icon to select the date. 	Not required to create the JSR, but required to open the JSR. This is determined by Placement.
<b>Staging Start Date</b>	The Staging Start Date indicates the day that Staging will begin. Use the drop-down arrows to select a date, or click the calendar icon to select the date. 	Not required to create the JSR, but required to open the JSR. This is determined by Placement.
<b>*Project Title</b> <i>Required for JSR</i>	Click the List >> button to the right of the Project Title field. The list that displays will vary based on the Request type originally selected. Enter text in the search field to conduct a search for a Project Title.	Determined by Post
<b>*Sector</b> <i>Required for JSR</i>	This field's choices are populated based on the Project Title selection.	Determined by Post
<b>*Desired Skills</b>	List any skills specific to this project that are desired.	Determined by Post
<b>*Project Description</b> <i>Required for JSR</i>	The Project Description Allows you to provide more detailed information about the assignment. Enter information into the free text area, providing details of the project and req being created.	Determined by Post
<b>Living Conditions</b>	Select the corresponding field that relates to living conditions.  <i>A Living Conditions comments field is provided for additional details.</i>	Determined by Post
<b>*Language Skills</b> <i>Required for JSR</i>	Use this field to indicate the language skills needed for the opportunity. Use the drop-down arrow to view the menu or click Selection details to view an entire list.  <i>A Language Skills comments field is provided for additional details.</i>	Determined by Post
<b>*Accept Master's International Information</b>	Select the appropriate radio button - yes or no.  <i>A Master's International comments field is provided for additional details.</i>	Determined by Post
<b>Is your post participating in one or more of these country-school partnerships? If so, indicate which ones.</b>	If applicable, select from the list the participating country-school partnerships. To select more than one hold CTRL button down while making selection.	Determined by Post
<b>*Accept Couples</b>	Select the appropriate radio button - yes or no.	Determined by Post
<b>Maximum Couples in Training Class</b>	If the assignment accepts married couples, put the maximum number of couples accepted in the training class. So, if 4 couples are permitted there will be 8 individuals. <b>This number should reflect the total number of couples per Training Class (not just this specific JSR)</b>	Determined by Post
<b>Matching Partner's AA</b>	Select the AA of the spouse.  <i>A Post Couples comments field is provided for additional details.</i>	Determined by Post



Req Fields	Key Information	Notes
<b>AA Combo Exclusions</b>	Type any AA combo exclusions here.	Determined by Post
<b>Number of PEPFAR funded Positions</b>	Type the number of positions funded.	Determined by Post
<b>*Req Team</b> <i>All reqs created will need the Req Team members listed</i>	Select yourself, the ChPT, and the Placement Manager	Determined by Post and updated by Placement
<b>Turn off Autofiler notification for this req</b>	If you do not wish to receive notification each time a candidate applies to the requisition, you can click the box.	Determined by Post
<b>*Regional Approval</b>	Select the ChPT	Determined by Post
<b>*VRS Approval</b>	Select the Placement Manager	Determined by Post
<b>*Notify upon approval completion</b>	Select the ChPT	Determined by Post

\* = required field



- Click **Save and continue>>**. The **Route req for approval** or **Save without routing req for approval** page displays with a message indicating that the requisition was created.

Enter req routing message

Select Request Type > Edit Req Form > Step 3: Send notification

Req 250BR : Forestry has been created.

To send a message with this req when routing it for approval, enter your message below.

Your message

☐ CC: Req team

Route req for approval Save without routing for approval

- When creating a req, you also have the option to save the req as a draft, by clicking **Save as draft**. This allows you to finish the requisition at a later date.

- If you save a req as a draft, you can access that req by selecting **Reqs/View my reqs/Pending**. To open a req, select the req's check box, and then click Edit in the Actions list.

- Complete the requisition's information, and then click **Save and continue**.

- To cancel the req, select the req's check box, and then click **Cancel** in the Actions list. Saved requisitions remain in the system indefinitely until an action is taken.

## Test Your Knowledge

Answer the following questions "True or False"?

- Depending on the initial req template selected, you will always have 4 options to choose from in the Request Type drop-down menu?
- When completing a req, you must complete all fields with a red asterisk?
- All requisitions completed have the same requisitions fields?
- For all reqs, once the req is created, users can begin to nominate candidates to that req.



## Section 5.7: Approval Routing – Next Step in Creating a JSR

Peace Corps will use approval routing when initiating a JSR. No other reqs created go through the approval routing process. The approval routing will include: Regional Approval and VRS Approval. The Regional Approval field in the JSR refers to the headquarters based CHPTS and the VRS Approval field refers to Placement staff. Approval Routing is used so that approval and any additional information can be added to the req before it is opened. If changes are made to a req, the sender can use the body of the routing message to make a note to the approver.



It is important to note that once a ChPT has approved a JSR, Post cannot edit it. Placement is the only role in the system that can edit and update the JSR, as they are the second level approver.

So, the roles concerned with approval routing include:

- Post (serves as creator)
- ChPTs (serves as first approver / Regional Approval)
- Placement (serves as editor and second approver / VRS Approval)

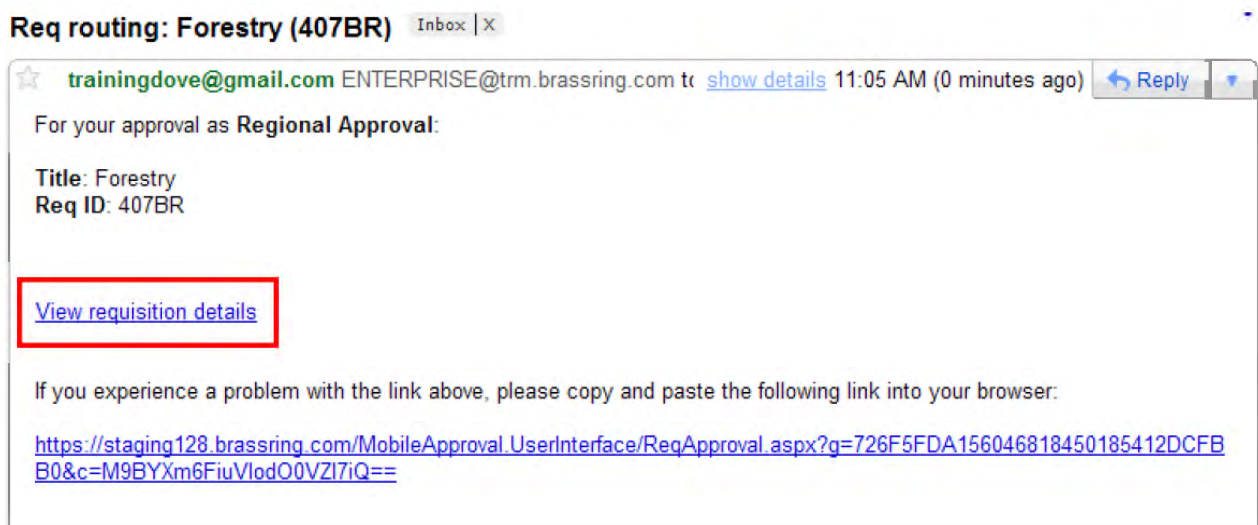
Recruitment will be able to see which reqs are open for that fiscal quarter/year to help find the right candidates, but they do not get involved with the approval routing.

### Approve/Decline Requisitions

The approvers will receive the req via eLink. The eLink will indicate a req is available for review. Req approvals are sent in sequential order-the first approver must approve the req before the second approver receives their eLink to approve the req.

To respond to the approval request:

1. Open the email as you normally would. **Click** the link **View requisition details**.





2. The **Approve/Decline** page is launched. Review the information on the Req details. If edits are necessary, complete them on the Req details and ensure a note is entered on the Req notes. (See figure 1.1)



3. Type a **message** if necessary for the next approver.

*Note: First approvers will only have the option to Approve or Decline a req, while second approvers will also have the ability to Approve and reroute.*

4. **Click** Approve or Decline

## Req Declined

If the req is declined, an eLink will be sent to the Owner, Manager and members selected for the Req Team. If the req is declined, the approval process is immediately halted.



Best practice indicates adding a message so the req owner will have information on what is needed to have the req continue through the process for approval.

## Req Approved

If the req is approved, an eLink will be sent to the Owner, Manager, and members selected for the Req Team. Post and Placement receive a notification indicating the req has been approved. The req is now ready to be opened.



## Watching the Approval Routing

To track the approval process to determine who has yet to approve the req:

1. From the **Reqs** tab, click **View my reqs > Pending reqs**.
2. View the req by **clicking** on the **Auto req ID hyperlink**

Select all	Title	Positions Remaining	Total candidates	Manager	Owner	Agency	Date created	Auto req ID
<input type="checkbox"/>	Forestry	1	0	Zdemo, Training01	Zdemo, Training02		28-Sep-2011	407BR

3. Scroll to the bottom of the req form to the **Approval Routing** section. A date stamp appears next to the name of the person who has approved the req. If a blank space appears next to an approver's name no approval has been completed by this person.
4. If the approval process has stalled, you can set the approval process back in motion by clicking the **Route req for approval button**.

Req detail 249BR: Forestry

Buttons: Edit req, Save req as new, eLink req, Select job posting preview, Print req, Put req on hold, Cancel req, Delete req, Declined, Talent Match, **Route req for approval**

Turn-off Autofiler notification for this req ☐

Approval routing	Job title	User	Date
Regional Approval		Joe Smith	23-Aug-2011
VRS Approval		Joe Smith	

Notify upon approval completion Support  
Added by Support  
Added on 23-Aug-2011

## Test Your Knowledge

Answer the following questions "True or False"?

1. All requisitions that are initiated are required to go through the approval routing process?
2. If the req is declined, the approval routing process is immediately halted?
3. If the approval process has stalled, the req cannot be put back through the approval routing?





## Section 5.8: Opening a Req

Most reqs will be available to open upon completion of the req form. For all reqs, except the Evergreen Req, it is important not to post to the Talent Gateway.

### To open the JSR:

1. From the **Reqs tab**, click View all reqs > Approved.
2. View the req by clicking on the req number link.
3. The Req detail screen is launched. Use the scroll bar to review the req details.
4. Click the **Open req** button to open the requisition.

**Req detail 407BR : Forestry** Help

Edit req Save req as new eLink req Select job posting preview Print req

Put req on hold **Open req** Cancel req Delete req Talent Match

Manage campaign

Req detail Req history Forms

Req template: PCV Job Specific Req

Job posting preview eLink history

Sender name	Recipient name/email	eLink sent	eLink opened
Zdemo, Training02	Zdemo, Training02	29-Nov-2011	

Req details Forestry Req status Approved

**Request Type** 100 100-Forestry

**Title** Forestry

**Description** Volunteers help communities conserve natural resources by working on projects such as soil conservation, watershed management and flood control; other projects include production of sustainable fuels, improvement of agro-forestry practices such as fruit production, building live fences and alley cropping and preservation of biodiversity, sometimes near national parks or other reserves.





The Talent Gateways page is launched once the req button has been clicked, the posting options screen displays. The requisition will **not be posted** to the Talent Gateway, so no action is taken other than to click Update all Postings which opens the requisition.

Open req 40708 Forestry

Do you want to open 40708 : Forestry?

Posting 40708 : Forestry [Select job posting preview](#)

**Talent Gateways**

[Select all](#)

	Gateway site	Repost	Days until posted	Days to remain posted	Currently posted	Posted date	Removal date	Select Gateway Questionnaire	GQ Details	Edit site questions
<input type="checkbox"/>	OMB - Demo	<a href="#">Repost</a>	00	365				None	<a href="#">Expand</a>	
<input type="checkbox"/>	Peace Corps - Evergreen Req	<a href="#">Repost</a>	00	365				None	<a href="#">Expand</a>	

[Reset Gateway Questionnaire\(s\) to default](#)

There are no third party posting options.

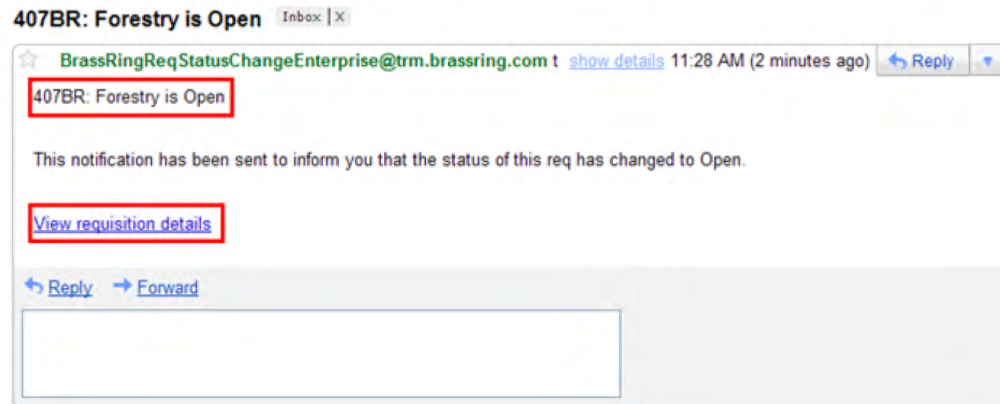
[Update all postings](#) [Cancel](#) [Refresh](#)



## Requisition Opened

Once a req has been opened, whether it is a JSR, TCR, or PCV Married Couples Req, an email notification (eLink) is sent to the Owner, Manager and any Req Team members selected.

The eLink will indicate a req has been opened and provide a link to View the req. Click the link to **View requisition details**.

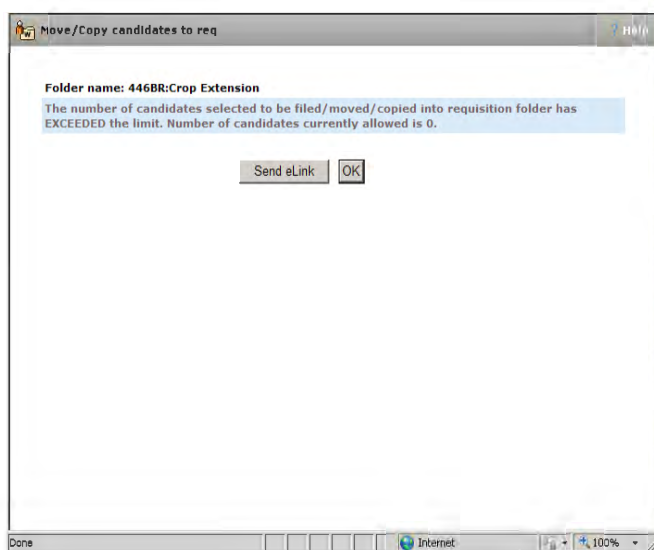




## Section 5.9 Filled and Unfilled Reqs

JSRs and MCRs both have nomination caps. This means that only a limited number of Candidates can be moved into each of these reqs. This number is determined by the Placement office. When Placement staff is completing these reqs, they will determine the number of nominations needed and fill in this field. Under Candidate Limit Status they will select "Unfilled." Once the req is opened, recruitment staff can search for all "Unfilled" JSRs or MCRs. After the nomination limit is reached (the number of candidates moved into the req equals the number of the nominations needed) the Candidate Limit Status automatically changes to "Filled". The system will not allow additional candidates to be moved into the JSR or MCR after the nomination cap has been reached.

The following error message will appear if the nom cap has been reached.



Viewing a req, allows you to see the parameters for filling a req based on the Volunteers Requested and Number of Nominations Needed fields.

\*Title

\*Description 
[Expanded view](#)

\*Owner 
[Selection details](#)

\*Manager 
[Selection details](#)

\*Volunteers Requested (PCV, PCR, and TCR reqs only)

\*Region 
[Selection details](#)

Sub-Region 
[Selection details](#)

\*Post 
[Selection details](#)

No. of Nominations Needed

Candidate Limit Status ☒ N/A ☐ Filled ☐ Unfilled

\*PST Start Date

Fiscal Quarter 
[Selection details](#)

Fiscal Year 
[Selection details](#)



## Section 5.10: Creating a TCR

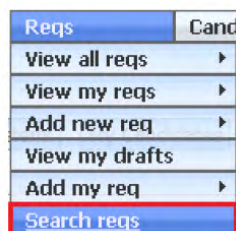
The following provides an overview for creating a TCR. TCRs are created by Country Desks to identify the candidates to be staged and sent abroad to their host country. Future changes to JSRs are reflected in TCRs by Placement staff. The TCR is the last req of the candidate process.

### TCR Req Form:

TCRs are created by Country Desk and can remain open as long as there are active candidates in the req. TCR Reqs require no formal approval process, but are created with a req team and notification options like other reqs. The key fields for TCRs are the number of volunteers requested for each, the training allocations, and the process deadlines.

To begin the process of creating a TCR, Country Desk will identify all JSRs in a given fiscal quarter for a specific Post. To do this:

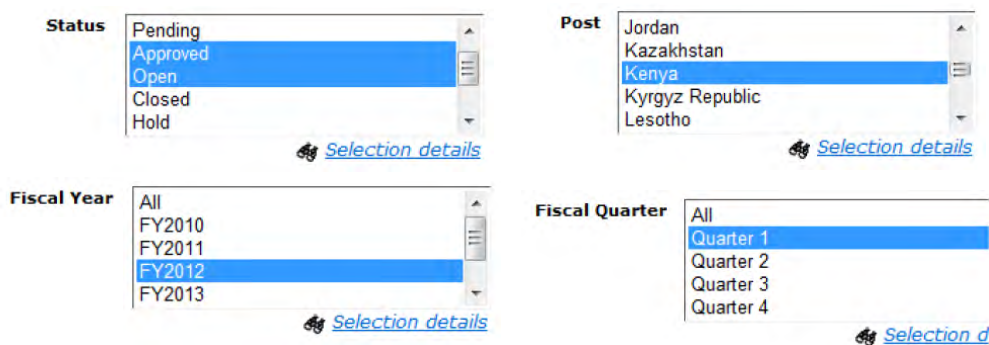
1. Navigate to the Reqs tab > Search reqs.



2. With the Search reqs page launched, use the gray bar drop-down menu and select PCV Job Specific Req



3. On the same page, select **Status > Approved and Open**, select the **Post > (Country Name)**, select the correct **Fiscal Year > FY20XX**, select the **Fiscal Quarter > Quarter X** and click **Search**.





4. The Search results page is launched. Review all reqs in the results with start date in the desired quarter and fiscal year. All JSRs listed should be included in the TCR.

Req search results Show Results 1-50 >>> Showing reqs 1-50 of

Actions English (US) View search criteria Refine search Sort options Edit output fields Save output fields

	Select all	Title	Req folder	Country	No. of Nominations	Total candidates	Auto req ID
	<input type="checkbox"/>						
	<input type="checkbox"/>	WL Health Extension		Kenya	50	2	<a href="#">381BR</a>

5. Navigate to the Reqs tab at the top of the Search results page > click **Add new req > PCV Training Class Req**.

Reqs	Candidates	Admin
View all reqs		
View my reqs		
Add new req		
View my drafts		
Add my req		
Search reqs		

PCV Evergreen Req
PCV Job Specific Req
PCV Married Couples Req
PCV Master's International Req
PCV Medical Pending Req
PCV Recruiter Req
PCV Retired Candidates Req
PCV Training Class Req



6. The Select Request Type page is displayed. Use the drop-down arrow in the Request Type box and **select TCR000 TCR Requisition** > click Continue.

+ Select job code

Step 1: Select Request Type

Request Type **TCR000 TCR Requisition** [Selection details](#)

\* = required field

Continue >> Cancel

7. On the req form, you must enter information for all required fields, which are noted with a red asterisk. It is a best practice to complete the form from top to bottom, as the selection for one field may automatically populate the selections for following fields.

+ Add a new req

Select Request Type > Step 2: Edit Req Form

Req details [Spell check](#)

\* Request Type: TCR000 TCR Requisition

\* Title

\* Description [expanded view](#)

\* Owner [Selection details](#)

\* Manager [Selection details](#)

\* Volunteers Requested (PCV, PCR, and TCR reqs only) 1

\* Post [Selection details](#)

\* Fiscal Year [Selection details](#)

\* Fiscal Quarter



The table below provides an overview of required and non-required fields on the requisition for TCR requisitions. Country Desk determines the req form content based on the requirements from Post and the JSRs.

**Summary Table: Fields in a TCR Req Form**

Requisition Fields	Key Information
*Request Type	This field is selected from a drop down menu before the req form and will be auto transferred to the next screen (req form).
*Title	Name the req (TCR, Post Name, Q3 FY11).
*Description	Enter the same information as entered in Title.
Auto req ID	This is the unique number that is auto populated and corresponds to each req when created.
*Owner	Select yourself.
*Manager	Select the Placement Manager.
*Volunteers Requested (PCV, PCR and TCR reqs only)	The number entered will be the total of all Volunteers Requested from the corresponding individual JSRs.
Positions Remaining	This number will auto populate based on the number of volunteers placed into that training class.
Post	Select the country from the drop down menu.
Fiscal Year	Select the appropriate fiscal year.
Fiscal Quarter	Select the appropriate fiscal quarter.
AA fields (several fields in the forms are devoted to the AA)	<p>The AA fields allow you to select up to ten AAs to reference in the TCR.</p> <ul style="list-style-type: none"> <li>• <b>AA #</b> – This allows the user to use the drop-down menu and select the same information as the JSR.</li> <li>• <b>Number of AAs</b> – equates to the Trainees Requested (This is the number that the posts specifically request for each AA)</li> <li>• <b>AA Comments</b> – any comments regarding the AA, (i.e. No overfill, No MI)</li> <li>• <b>AA Training Allocation</b> – enter the appropriate number for training allocation for this AA. This is entered by Placement.</li> </ul>
Invitation Deadline	Select the appropriate invitation deadline. Use the calendar icon to assist in making selections. Deadlines should correspond to the dates in the JSR.
Staging Start Date	Select the appropriate staging start date. Use the calendar icon to assist in making selections. Dates should correspond to the dates in the JSR.
*Req Team	Select yourself and the Placement Officers that correspond to each of the Assignment Areas in the TCR. To select more than one member, highlight yourself and then press CTRL on the keyboard and highlight the Country Desk Unit (CDU).
Turn off Autofiler notification for this req	The default shows no check in the box; click the box to add a checkmark and have auto-filer notifications turned off for this req.
* Notify upon approval completion	Select yourself from the drop-down menu.
Added by	The creator of the req is recognized here.
Added on	The req creation date is logged here.

\* = required field

8. After completing the req form, click **Save and continue >>**.

Save and continue >>





- The “Route req to open or save req as approved” page is launched. It is important to note that while TCR reqs are opened, they are NOT posted to Talent Gateways. Click **Open req**.

Route req to open or save req as approved. Help

Select Request Type > Edit Req Form > Step 3: Send notification

Req 271BR : Training TRC ONLY has been created.

To send a message with this req when opening it or saving it to approved reqs, enter your message below.

Your message

☐ CC: Req team

Open req Save req to approved reqs

## Opening TCR Req

Once the Open req button has been clicked, the posting options screen is displayed. TCR reqs **are not posted** to any Talent Gateway. You will not select any Gateway site.

Req 271BR : Training TRC ONLY Help

Do you want to open 271BR : Training TRC ONLY?

Select job posting preview

Talent Gateways

Select all	Gateway site	Report	Days until posted	Days to remain posted	Currently posted	Removal date	Select Gateway Questionnaire	GQ Details Edit site questions
<input type="checkbox"/>	OHS - Demo	Report	00	365			None	Expand
<input type="checkbox"/>	Peace Corps - Evergreen Req	Report	00	365			None	Expand
<input type="checkbox"/>	Peace Corps Response	Report	00	365			None	Expand

Reset Gateway Questionnaire(s) to default

There are no third party posting options.

Update all postings Cancel Runall

To complete the req process, click **Update all postings**. Do not check any of the boxes, just click **Update all postings**. The confirmation page will appear indicating the req has been opened and is launched. Click **OK**.

Open req 271BR : Training TRC ONLY

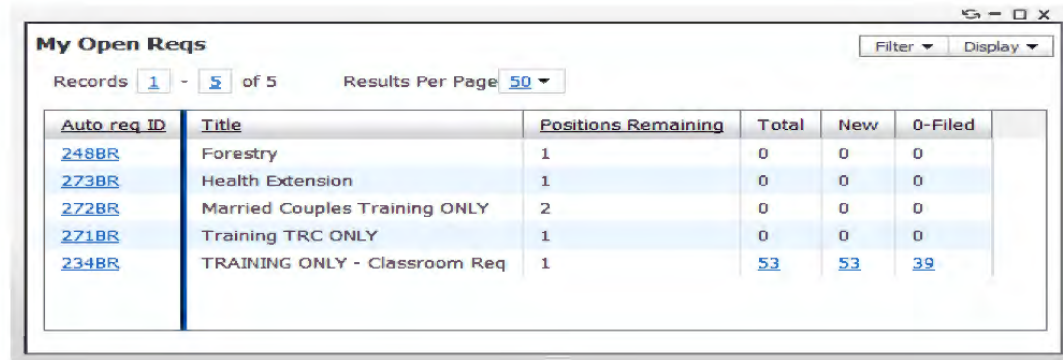
The req 271BR : Training TRC ONLY has been opened.

OK



## Section 5.11: Viewing a Newly Created Req

The newly created req can be seen in the **My Open Reqs** panel. Click the refresh icon on the panel to refresh the panel content, and locate your new requisition. The new req appears at the top of the list in the panel.



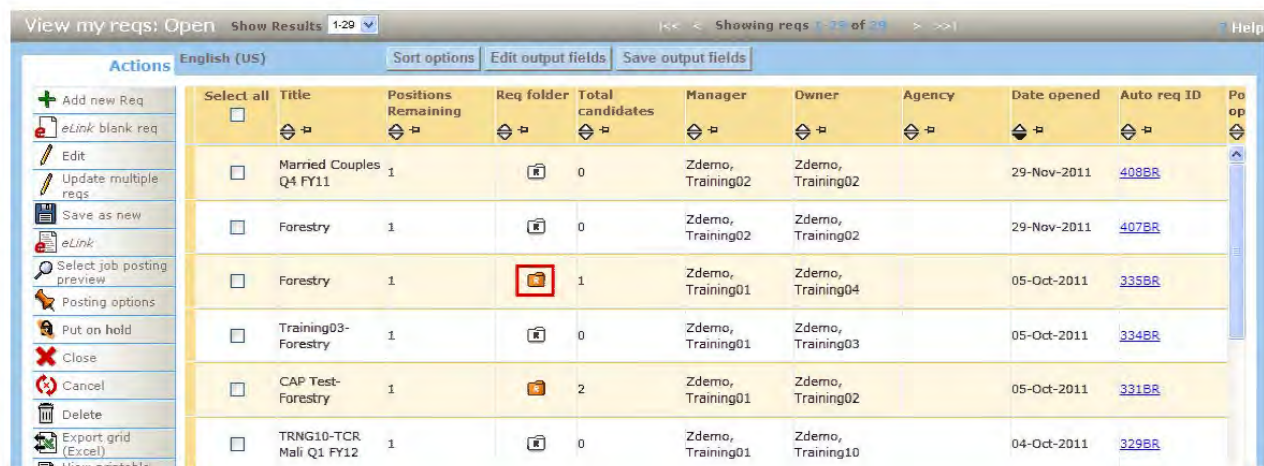
Auto req ID	Title	Positions Remaining	Total	New	0-Filed
<a href="#">248BR</a>	Forestry	1	0	0	0
<a href="#">273BR</a>	Health Extension	1	0	0	0
<a href="#">272BR</a>	Married Couples Training ONLY	2	0	0	0
<a href="#">271BR</a>	Training TRC ONLY	1	0	0	0
<a href="#">234BR</a>	TRAINING ONLY - Classroom Req	1	<a href="#">53</a>	<a href="#">53</a>	<a href="#">39</a>

The **My Open Reqs** panel displays your open reqs and the number of candidates in the req folder.

The Total column shows the total number of candidates who have applied, the New column will display the number of new candidates that you have not viewed yet. Click the number in the column to view your candidates. Click the Auto req ID number link to see the details of the requisition.

You can also access your candidates using the Reqs menu.

Click on Reqs>**View My Reqs>Open**.



Select all	Title	Positions Remaining	Req folder	Total candidates	Manager	Owner	Agency	Date opened	Auto req ID
<input type="checkbox"/>	Married Couples Q4 FY11	1		0	Zdemo, Training02	Zdemo, Training02		29-Nov-2011	<a href="#">408BR</a>
<input type="checkbox"/>	Forestry	1		0	Zdemo, Training02	Zdemo, Training02		29-Nov-2011	<a href="#">407BR</a>
<input type="checkbox"/>	Forestry	1		1	Zdemo, Training01	Zdemo, Training04		05-Oct-2011	<a href="#">335BR</a>
<input type="checkbox"/>	Training03- Forestry	1		0	Zdemo, Training01	Zdemo, Training03		05-Oct-2011	<a href="#">334BR</a>
<input type="checkbox"/>	CAP Test- Forestry	1		2	Zdemo, Training01	Zdemo, Training02		05-Oct-2011	<a href="#">331BR</a>
<input type="checkbox"/>	TRNG10-TCR Mali Q1 FY12	1		0	Zdemo, Training01	Zdemo, Training10		04-Oct-2011	<a href="#">329BR</a>

Click on the **orange req folder** icon to view your candidates.

An orange req folder  icon indicates that candidates are inside that req.

A white req folder  icon shows that no candidates are in the req.



### *Test Your Knowledge*

*Answer the following questions “True or False”?*

1. An orange req folder icon indicates no candidates are in that req.
2. Newly opened reqs can be viewed on the DOVE Dashboard in the Welcome panel.



## Chapter 6: Closing the Req

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The req lifecycle discussed in Chapter 5, Managing the Reqs, reaches its end point when reqs are closed. This chapter covers the basics for how to close a req in the system. For more specifics about closing a certain req, see Appendix D, Req Lifecycle(s).

### Section 6.1: Why Are Reqs Closed?

Reqs are closed for several reasons. Including but not limited to:

- There are no active candidates in a req.
- The Recruiter leaves Peace Corps and their Recruiter Req is closed.
- The Regional Recruiting Office (RRO) is no longer operational, so the RRO Req is no longer needed.
- The host country is no longer operational; therefore, the Training Class Req (TCR) is no longer needed.



**It is a good rule of thumb, that if a req no longer contains any active candidates, the req can be closed**



## Section 6.2: Reviewing and Clearing the Req

Reviewing and clearing the req is the first steps to closing a req. Users must review a req for active candidates/volunteers before the req can be closed.

1. Review the req to see if there are any active candidates that can be moved to another req or dispositioned and moved to the Retired Candidates Req.

For example, Placement staff must review a JSR before it can be closed. All candidates in the JSR must either have been copied into a TCR, moved into a different JSR or be dispositioned. If there are multiple candidates at the same status that need to be dispositioned, you can update those candidates at the same time by selecting each candidate and clicking Update same status in the Action list.



To use update same status, all candidates must be in the same HR Status before being moved to a final HR status.

When dispositioning a Candidate to close a req, you must complete a disposition form and select the reason why the candidate is being dispositioned. Once the req is cleared of any active candidates, the req can be closed. A req with no active candidates will have a white req folder next to its row in the req output grid.

346BR



*This orange req folder indicates it contains candidates.*

314BR



*This white req folder indicates it does not contain candidates*



2. View the req details by selecting its auto req ID hyperlink from the req output grid. Make sure to select the empty req folder, as this contains no active candidates and can be closed.



3. This will open the req details window. Select **Close req**.

Req detail 314BR : TRNG04-Secondary Ed English Teacher

Edit req Save req as new eLink req Select job posting preview Print req Posting options

Put req on hold **Close req** Cancel req Delete req Talent Match

Manage campaign Source via campaign

Req detail Req history Forms

Req template: PCV Job Specific Req

Job posting preview eLink history

Req details TRNG04-Secondary Ed English Teacher Req status Open

**Request Type** 171 171-Secondary Ed English Teacher

**Title** TRNG04-Secondary Ed English Teacher

**Description** Volunteers teach conversational English, TEFL, or content-based English in middle and high schools. In addition to classroom teaching, Volunteers share resources, develop teaching materials with local teachers and become involved in community- and school-based projects.

**Auto req ID** 314BR

4. After selecting **Close req**, on the next screen select **Yes**.

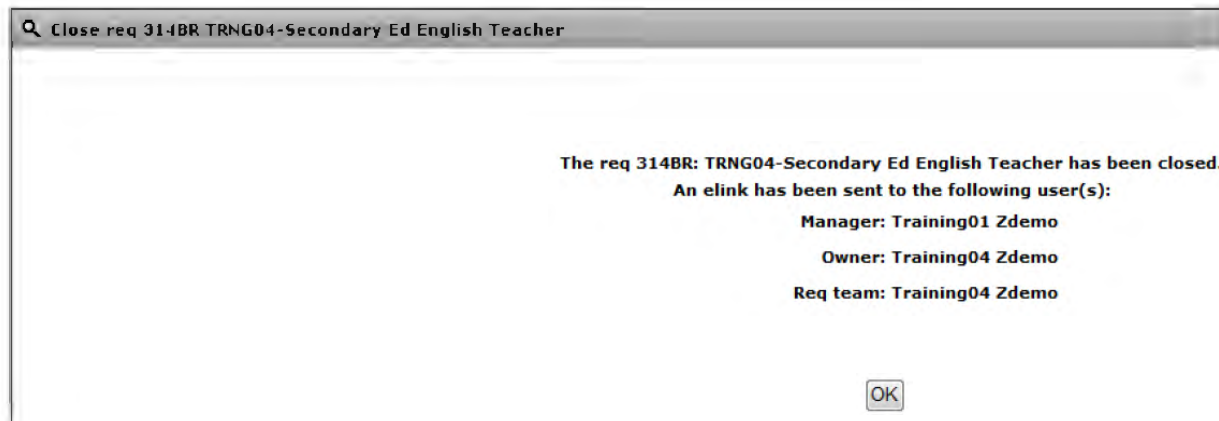
**X Close req 314BR TRNG04-Secondary Ed English Teacher**

Do you want to close 314BR : TRNG04-Secondary Ed English Teacher?

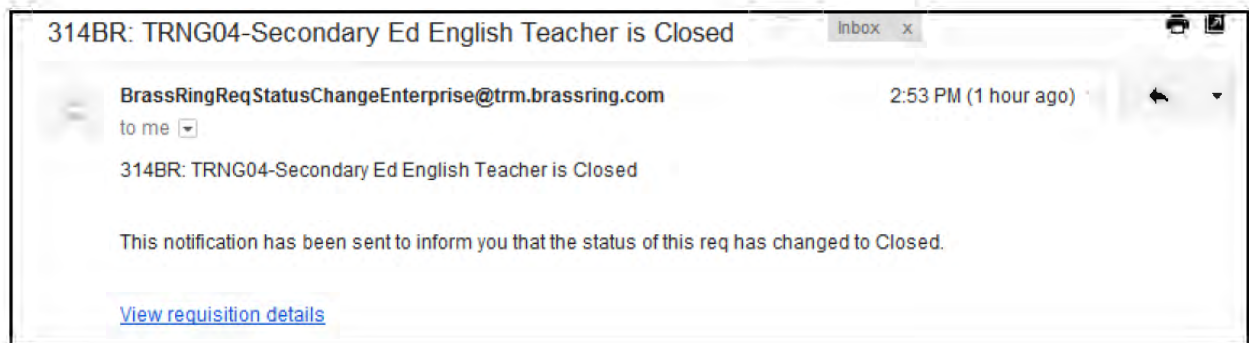
Yes Edit posting options Cancel



5. The Req Team will then receive an eLink message notifying them that the req is closed. Select **OK** to close the screen.



6. The eLink e-mail message will contain a link to [View requisition details](#).



### **Test Your Knowledge**

Answer the following questions “True or False”?

1. Communications are used to indicate the final disposition of a candidate.
2. Some forms will auto-generate based upon the HR status.
3. Placement dispositions all unselected candidates and a final disposition form is completed.





Filled and Unfilled reqs pertain to the nomination caps associated with JSRs and MCRs. Users should review the nomination caps when viewing req details or req forms for this information.

Closing a req is done only after no active candidates remain in the req. Users must put candidates into Retired Candidates Reqs after they have been dispositioned to clear out inactive reqs.

Definition	Term
Unfilled req	Unfilled reqs are JSRs or MCRs that have not yet reached their nomination caps.
Filled req	Filled reqs are JSRs or MCRs that have reached their nomination caps.
Opened req	Open reqs are ready to be filled with candidates. For JSRs, users should search for open and approved reqs before filling them with suitable candidates.
Closed req	Closed reqs are those that no longer contain active candidates/volunteers.



## Chapter 7: Working with HR Status

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This chapter reviews human resource (HR) statuses used throughout the candidate process and identifies how to manually update an HR Status. Reqs and HR Statuses work together. DOVE users should recognize the following candidate processing steps and the related reqs.

The following are the core actions you take with an HR Status and will learn with this chapter.

- Updating HR Status
- Viewing HR Status
- Undo an HR Status
- Working with Final Statuses
- Tracking Statuses Across Reqs

### Section 7.1: HR Status

The HR Status describes where a candidate is in the process. The HR status is also a significant communication tool. Users can view HR Status in a Talent Record or output grid and get updated information on the Candidate's progress.



The following are important considerations regarding the HR status:

- For most HR Statuses, you move/copy the candidate before changing the status.
- For nominations, first move the Candidate to either a JSR or Medical Pending Req and make sure Candidate is in the correct req. Then, update HR Status to Nomination Cleared, Nomination Validation Required, or Nomination Medical Pending.
- In some cases, there are several HR statuses within one req (e.g. Recruiter Req).
- Any member of a Req Team can update the HR Status of a Candidate in that folder.
- DOVE will only show you the next possible HR statuses for a particular candidate. A Candidate's current HR Status limits and filters the list of available HR statuses.
- It is possible to undo an HR Status, but reverting to a previous HR Status does not change or remove any disposition forms, notes, or communications sent regarding that HR Status.

The following represents the steps in the candidate process. The HR Status steps noted with an asterisk (\*) indicate that the system automatically updates the Candidate to this status. At any point in the process, the Candidate may be dispositioned due to not meeting a requirement or by requesting to be removed from consideration (see Chapter 7.5, Final Statuses).



## Summary Table: HR Status and Req

Step #	HR Status	Req	Note
0	0-Filed	Evergreen Req	Only viewable in Action Log (system status).
1	Application Received*	Evergreen Req	Candidates are copied from the Evergreen Req automatically to the RRO and Legal Pending Reqs.
2	Application Complete *System auto update once both application and Health History Form (HHF) is received	RRO Req	Candidates become visible to Recruitment at Application Complete
3	RC Reviewed – Completed by Recruitment	RRO Req	
4	References Received - Completed by Recruitment	Recruiter Req	
5	Interview Scheduled – Completed by Recruitment	Recruiter Req	
6	Candidate Interviewed – Completed by Recruitment	Recruiter Req	
7	Nomination Cleared	JSR	Once the Candidate's HR Status changes to Nomination Cleared, the Candidate is viewable by Legal Office.
7a	Nomination Validation Required	JSR	
7b	Nomination Medically Pending	Medical Pending Req	
8	Legally Cleared – Completed by Legal	JSR / Legal Pending Req	Once a candidate is Legally Cleared in the Legal Pending Req, this automatically updates the HR Status to Legally Cleared in the JSR.
9	Invited – Completed by Placement	JSR	
9a	No Interest Reassigned – Completed by Placement	JSR	
9b	Invitation Declined – Completed by Placement if candidate elects to decline invitation	JSR	
10	Invitation Accepted - *System auto update once candidate clicks accept on Invitation Decision Form	JSR	
11	Final Medical Clearance – Automatically updates from MAXx	TCR	
12	Staging – Updated by Staging	TCR	
13	Trainee – Updated by Staging	TCR	
14	Volunteer – Updated via integration	TCR	



## Section 7.2: Updating an HR Status

1. Open the orange req folder to view the candidates within that req.

Req search results

Show Results1:50

<< < Showing reqs 1-50 of 67 > >>

Actions

English (US)

View search criteria

Sort options

Edit output fields

Save output fields

</

2. Click the link for the chosen candidate in the HR Status (click to update) column. This will open the Update status page, as shown below.

Req folder: 407BR : Forestry

Show Results

1-34

<< < Showing candidates 1 of 34 > >>

Actions

<< Back

Selected Candidates: 0

Sort options

Set quick filters

Edit output fields

Save output fields

Filter this folder

See req details

View

eLink

Talent Comparison

Update same stati

Select all	Name	Viewed	Notes	Forms	HR status	Candidate type	HR status (click to update)	HR status date	Updated by	Last codes
1	<a href="#">Jones, Mary</a>					<a href="#">BECV</a>	<a href="#">Candidate Interviewed</a>	16-Dec-2011	Zdemo, Training04	<a href="#">QM-Iteration3</a>

3. Select the appropriate HR Status from the list, and click Update to save the new status and close the screen. The new Status Action date and Date updated will display in the folder in which the Candidate is filed. The HR statuses will follow a particular order, based on the Candidate's current HR Status. You will not be able to skip HR statuses. For example, you will not be able to go from Candidate Interviewed to Staging.

https://staging128.brassring.com/Jetstream/500/Presentation/Template/Asp/Candidate/Tc

Update status for Jones, Mary

[\(Back to current HR status\)](#)

Current status	Updated by
Candidate Interviewed	Zdemo, Training04

☐ Nomination Cleared

☐ Nomination Validation Required

☐ Nomination Medically Pending

☐ Candidate Withdrawn

Action date: 16 Dec 2011

Notify users working with this candidate: ☐



4. Besides the “Update” button, there are several other options from this **Update status** window: Update and Add Next, Undo Status, and Close Window.
- The **Update and add next** option will be an active button, but don’t use it. It doesn’t accurately update for Peace Corps workflow. It will only cause potential errors down the line.
  - Undoing HR statuses will be discussed in section 7.4.
  - Close Window allows you to close the Update Status window. It does not save any updates in the HR Status radio buttons (#3, above), unless you have previously selected update.



Do not use “Update and Add Next”.

Keep in mind, certain HR Statuses will launch reminders that you must complete certain forms before moving the candidate on in the process. For example, once a Candidate reaches HR Status – Candidate Interviewed, the PCV Legal Form Reminder is launched (see below).

PCV Legal Form Reminder for Jones, Mary

eLink blank form

**PCV LEGAL FORM REMINDER**

You must complete a PCV Legal Form for every candidate prior to nomination. If you have not already done so, please add and complete the PCV Legal Form for this candidate. If the form is already completed, disregard this message.

CLICK "CLOSE" TO EXIT.

\* = required field

Save Clear Close



## Section 7.3: Viewing an HR Status

There are many ways to view an HR Status:

### Search reqs

1. Perform a req search and enter the appropriate req folder to view the candidates you have just updated.
2. In the req output grid you can see the column “HR Status” to check to see if it is updated correctly. From the below example, you can see Mary Jones has now been updated from Candidate Interviewed to Nomination Cleared.

Req folder: 407BR : Forestry Show Results 1-34 of 34

Actions << Back See req details Candidates: 0 Sort options Set quick filters Edit output fields Save output fields Filter this folder

Select all	Name	Viewed	Notes	Forms	HR status	Candidate type	HR status (click to update)	HR status date	Updated by	Last codes	Em
1 <input type="checkbox"/>	Jones, Mary		+		1	RPCV	Nomination Cleared 2	Dec-2011	Zdemo, Training04	DM-Iteration3	

### Candidate Quick Search

1. Similarly, users can perform a candidate search and look for a specific Candidate that they have just updated. *Reminder: Don't update the HR Status from this screen. Only view do not update in the candidate output grid.*

Search Candidates Search Reqs Jones, Mary


2. In the candidate output grid, look for the HR Status column to verify HR Status.

Search Results Show Results 1-6 of 6

Actions Selected candidates: 0 Sort options Set quick filters Edit output fields Save output fields

Select all	Viewed	Notes	Forms	HR status	Candidate type	Employer	Position held	Location	Date last loaded	Name
1 <input type="checkbox"/>		+		1	RPCV				20-Sep-2011	Jones, Mary

2

3. Once selecting , users will be able to view the HR status (current status history) in all reqs the Candidate is in.

 View status for Jones, Mary Help

Current status		Status history			
HR status date	Folder	Req ID	Req/Folder	Updated by	HR status (click to update)
16-Dec-2011		407BR	Forestry	Zdemo, Training04	Nomination Cleared
30-Nov-2011		291BR	New York RRO 2	Manager, Automation	Application Received
30-Nov-2011		202BR	PCV Legal Pending Req	Manager, Automation	Application Received

Close 3





## Viewing HR Status from Talent Record

1. From a candidate or req output grid, click on the Candidate's name hyperlink.

Search Results Show Results 1-6 Showing candidates 1 of 5

Actions Selected candidates: 0 Sort options Set quick filters Edit output fields Save output fields

eLink	Select all	Viewed	Notes	Forms	HR status	Candidate type	Employer	Position held	Location	Date last loaded	Name
View	<input type="checkbox"/>										
Update same status	1 <input type="checkbox"/>		+		!	RPCV				20-Sep-2011	<a href="#">Jones, Mary</a>
File to req											

1

2. This will take you to a Talent Record.
3. Look for the Action Log. The changes to HR Status are also logged here.

Submission History Action Log Print Search Filter

Action	Date	Action by	Details	Name/Type	From	To	Folder
HR Status - Updated	16-Dec-2011	Zdemo, Training04		Current Status	Candidate Interviewed	<a href="#">Nomination Cleared</a>	<a href="#">407BR:Forestry</a>
HR Status - Updated	16-Dec-2011	Zdemo, Training04		Status History	Interview Scheduled	Candidate Interviewed	<a href="#">407BR:Forestry</a>

3





## Section 7.4: Undo an HR Status

**Undo status** returns the Candidate to the previous HR Status. For example, if a user has made a mistake in the selection previously chosen, they would need to undo the status. Although undoing an HR Status is a simple action, it will **not** recall any automatic emails that have been sent. The status will initially be undone in the req the action is performed in. Only certain user types will be able to undo statuses. Because of integrations with the medical system, undoing statuses have many implications and we want to avoid unnecessary errors,

1. Go to the req output grid and go to the Candidate that has the incorrect HR Status. Click on the link in their HR Status column.

Req folder: 407BR : Forestry Show Results 1-34 Showing candidates 1 of 34

Select all	Name	Viewed	Notes	Forms	HR status	Candidate type	HR status (click to update)	HR status date	Updated by	Last codes
<input type="checkbox"/>	Jones, Mary		+			RPCV	<b>Nomination Cleared</b>	16-Dec-2011	Zdemo, Training04	DM-Iteration3

2. Click **Undo status**.

Update status for Jones, Mary

[\[Back to current HR status\]](#)

Current status	Updated by
Nomination Cleared	Zdemo, Training04

☐ Legally Cleared  
☐ No Interest - Reassigned  
☐ No Interest PO Reviewed  
☐ Medically Not Cleared  
☐ No Interest Legal Reviewed  
☐ Candidate Withdrawn

Action date: 16 Dec 2011

Notify users working with this candidate ☐

3. Once “Undo status” is selected, users can return to the req output grid to validate that the change was made. In this example, Mary Jones has changed from Nomination Cleared back to Candidate Interviewed (the HR Status prior to Nomination Cleared).


Req folder: 407BR : Forestry Show Results 1-34 Showing candidates 1 of 34

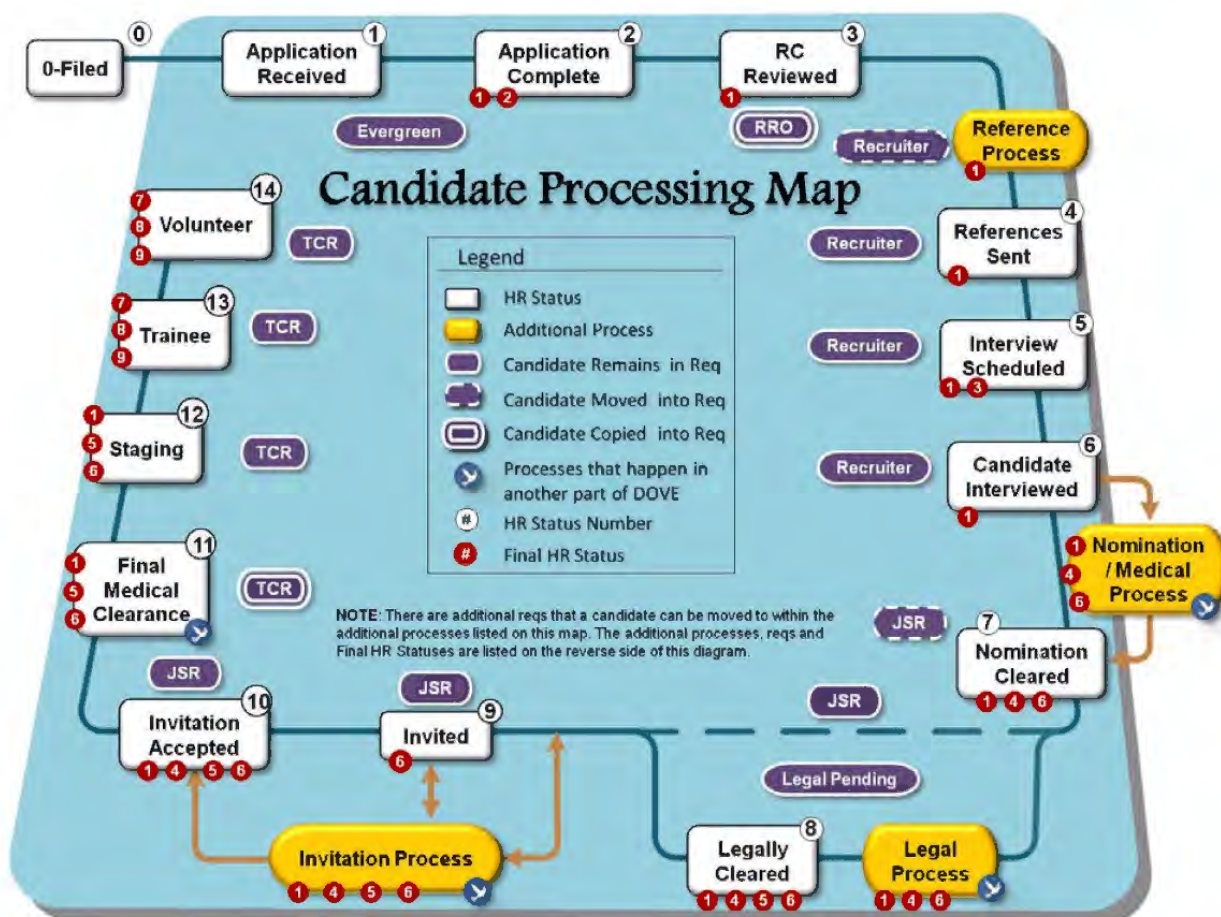
Select all	Name	Viewed	Notes	Forms	HR status	Candidate type	HR status (click to update)	HR status date	Updated by	Last codes
<input type="checkbox"/>	Jones, Mary		+			RPCV	Candidate Interviewed	16-Dec-2011	Zdemo, Training04	DM-Iteration3



## Section 7.5: Working with Final HR Statuses

The following are final HR statuses. If a candidate does not proceed in the process for Candidate or Peace Corps reasons, final HR statuses are utilized and a disposition form must be filled out.

The red numbers  indicate final HR statuses. Final statuses are used when a Candidate leaves the process by their choice (e.g., "Candidate Withdrawn") or because of something identified in Peace Corps' evaluation that prevents them from moving forward (e.g., "Medically Not Cleared"). The final statuses are discussed in relation to disposition forms. All DOVE users should be aware that a disposition form must be filled out if someone is removed from the candidate process.



Final statuses include:

1. Candidate Withdrawn
2. No Interest RC Reviewed
3. No Interest Interviewed
4. No Interest PO Reviewed
5. Medically Not Cleared
6. No Interest Legal Reviewed
7. Completion of Service
8. Early Termination
9. In-Service Death



Please note: based on your User Type you may not see all Final HR Status update options.

A disposition form must be completed for every final status. A disposition form allows the user to describe why the candidate is no longer in the process and captures any additional information. Users must explain if the disposition was driven/initiated by the Peace Corps or by the Candidate.

### Disposition Form:

Form Fields	Key Information
*Candidate First Name	This auto-populates from the previous screen.
*Candidate Last Name	This auto-populates from the previous screen.
*Req ID	This is the unique number that is auto populated and corresponds to each req the status is being changed in.
*Req Folder	This is the unique number that is auto populated and corresponds to the name of the req the status is being changed in.
*Candidates Current Status	Type the Candidate's current HR Status (prior to disposition).
Candidate Not Interested**	Reason – Describe why the Candidate is being dispositioned. (Why the Candidate is no longer interested in Peace Corps).  <i>Additional notes comment box provided</i>
Peace Corps Not Interested**	Reason – Describe why the Candidate is being dispositioned. (Why the Peace Corps is no longer interested in this Candidate).  <i>Additional notes comment box provided</i>

\* = required field

\*\* - select one or the other field, not both.

### Final Statuses and Role:

Final HR Status	Role
Candidate Withdrawn	All users
No Interest RC Reviewed	Recruitment
No Interest Interviewed	Recruitment
No Interest PO Reviewed	Placement
Medically Not Cleared	Integration with MAXx
No Interest Legal Reviewed	Legal
Completion of Service	Integration with ESB
Early Termination	Integration with ESB
In-Service Death	Integration with ESB



## Section 7.6: HR Statuses Across Reqs

HR Statuses are retained across all reqs. A Candidate's HR Statuses are reflected in anywhere from 3-5 different reqs, depending on step of the process (see chart below). The Evergreen Req always has to have the most recent status in order to reflect the accurate Talent Mask on the Candidate's Landing Page.



It is very Important to wait at least 10 minutes between updating each status to allow time for the system to reflect the HR Status across all reqs.

**Summary Table: Scenarios for HR Statuses Across Reqs**

Scenarios: Candidate in HR Status...	1 <sup>st</sup> Req	2 <sup>nd</sup> Req	3 <sup>rd</sup> Req	4 <sup>th</sup> Req	5 <sup>th</sup> Req
(1) Application Complete	Evergreen Req	Legal Pending Req	RRO Req		
(2) RC Reviewed, References Received, Interview Scheduled, Candidate Interviewed	Evergreen Req	Legal Pending Req	Recruiter Req		
(3) Nomination Cleared, Nom Validation Required, Legally Cleared, Invited	Evergreen Req	Legal Pending Req	JSR		
(4) Invitation Accepted, Final Medical Clearance, Staging, Trainee, Volunteer	Evergreen Req	Legal Pending Req	JSR	TCR	
(5) Nomination Medical Pending	Evergreen Req	Legal Pending Req	Medical Pending Req		
(6) Nomination Cleared or Nomination Validation Required	Evergreen Req	Legal Pending Req	Master's International Req		
(7) Nomination Cleared or Nomination Validation Required, Legally Cleared, Invited	Evergreen Req	Legal Pending Req	Married Couples Req	JSR	
(8) Invitation Accepted, Final Medical Clearance, Staging, Trainee, Volunteer	Evergreen Req	Legal Pending Req	Married Couples Req	JSR	TCR

Whatever HR Status is reflected in the latest req should be reflected back across all previous reqs in the scenarios.



## Chapter 8: Managing Candidates

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This chapter reviews how to manage your candidates by placing candidates into appropriate requisition (req) folders during the candidate processing.

Managing candidates involves:

- Editing and Reviewing the Application Assessment Form (see Chapter 13, Forms in DOVE)
- Collecting and Reviewing the References (see Chapter 12, Communications in DOVE)
- Interviewing the Candidate
- Updating the Candidate's HR Status and Req (see Chapter 5, Managing Reqs)
- Reviewing and Updating the Talent Record (see Chapter 9, Candidate Talent Record)
- Reviewing Forms, Communications, and other information (i.e. messaging to and responses from candidates in DOVE)

### Section 8.1: Candidate Screening and Tracking

Once the candidates have been identified as HR Status - Application Complete (both the Volunteer Application and Health History Form (HHF) have been received) they begin to move through the candidate process with the help of Recruitment. Processing time from application to entering on duty (EOD) is approximately 9-12 months. Candidates will be copied into the appropriate Regional Recruitment Office (RRO) Req based on the state indicated in the current address section on the application (or county listed for California). Recruitment Coordinators will access their office's RRO Req to view candidates before they are assigned to a specific Recruiter Req.



While working with candidates it is important to note a few things:

- **Nomination Cap:** Only a certain number of candidates can be nominated into a particular PCV Job Specific Requisition (JSR) and Married Couples Req (MCR). This limitation on candidates is referred to as a nomination cap. Nomination caps are not standardized, e.g. Placement can ask for two times the number of positions requested if a post is hard to fill. Nomination caps are completed for each JSR and MCR by Placement.
- **Volunteers Requested:** Post will determine the number of volunteers requested for the JSR based on the number of positions requested.

As candidates apply and begin to move through the process, they will be moved or copied into the appropriate requisition folders as they complete the associated processes with that req.

Appropriate forms and communications will be manually or automatically sent to the candidates as they progress through the process. All information related to the Candidate remains in the Talent Record.





## Section 8.2: Using Req Folders to Access Candidates

Req folders used in DOVE are similar to paper folders. Req folders are permanent folders created automatically for each req that is created. These folders allow you to track candidates through the volunteer recruitment process.

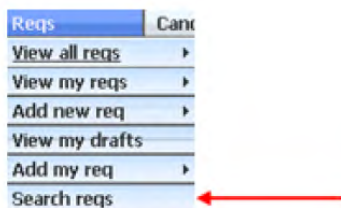
Once an HR Status is automatically updated to Application Complete (after Candidates complete their HHF in MAXx), Recruitment will access the appropriate RRO Req to view candidates for RC Review and if the candidate is qualified to assign candidates to their Recruiter Req. Below provides some steps to show how candidates are accessed from a req folder. Candidates go through many processes within the req (See Chapter 2, Candidate Processing), but the fundamentals are the same.

These fundamentals include:

- Select the right req folder to access the correct candidates
- Copy or Move the Candidate According to the Candidate Process
- View the Candidate's information in the Talent Record (Chapter 8, Candidate Talent Record)
- Send any key information or request any information via Communications and Forms to the Candidate via Communications (See Chapters 12, Communications and Chapter 13, Forms)

**To move a candidate from a req folder into a different folder complete the following:**

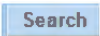
1. Click **Reqs > Search reqs**



2. The Search page is launched. You can search for specific types of reqs by using the drop down located in the **gray bar area** to select the search criteria from the available fields. Users will search for the appropriate req to move candidates into based on where the candidate is in the process.



3. Use the **gray bar** and select the Regional Recruitment Office (RRO) Req.

4. Click the Search button. 
5. The Req search results page is displayed.

Req search results Show Results 1-24 << < Showing reqs

English (US) <span>Sort options</span> <span>Edit output fields</span> <span>Save output fields</span>							
Actions							
Add new Req	Select all	Title	Req folder	Country	No. of Nominations	Total candidates	Auto req I
eLink blank req	<input type="checkbox"/>						
Update multiple reqs	<input type="checkbox"/>	Sample RRO Req				0	<a href="#">431BR</a>
Save as new	<input type="checkbox"/>	Test RRO				0	<a href="#">406BR</a>
Route for approval	<input type="checkbox"/>	North American RRO			4		<a href="#">386BR</a>
eLink	<input type="checkbox"/>	Mid-Atlantic RRO 2				28	<a href="#">295BR</a>
Select job posting preview							
Posting options							
Open							
Put on hold							





6. To view the candidates within the folder, **click the orange req folder**.

Select all	Title	Req folder	Country	No. of Nominations	Total candidates	Auto req
<input type="checkbox"/>						
<input type="checkbox"/>	Sample RRO Req				0	<a href="#">431BR</a>
<input type="checkbox"/>	Test RRO				0	<a href="#">406BR</a>
<input type="checkbox"/>	North American RRO				4	<a href="#">386BR</a>
<input type="checkbox"/>	Mid-Atlantic RRO 2				28	<a href="#">295BR</a>
<input type="checkbox"/>	Seattle RRO 2				1	<a href="#">294BR</a>

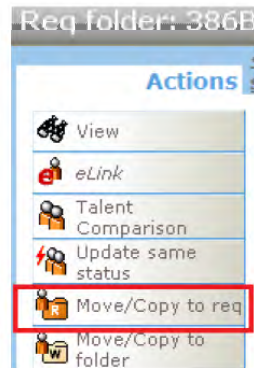
7. Candidates that have been placed into the RRO Req will be displayed.

Req folder: 386BR : North American RRO									
Show Results 1-4									
Showing candidates 1 of 1									
Actions << Back Selected candidates: 0 Sort options Set quick filters Edit output fields Save output fields Filter this folder									
 View  eLink  Talent Comparison  Update same status  Move/Copy to req  Move/Copy to folder  Add to Social Source  Send	Select all	Name	Viewed	Notes	Forms	HR status	Candidate type	HR status (click to update)	HR status date
	<input type="checkbox"/>								
	1 <input type="checkbox"/>	<a href="#">Jones, Mary</a>		+			Active	Application Complete	18-Nov-2011
	2 <input type="checkbox"/>	<a href="#">Jones, Chad</a>		+			Active	Application Complete	08-Dec-2011
	3 <input type="checkbox"/>	<a href="#">Jones, Rebecca</a>		+			Active	Application Complete	20-Dec-2011

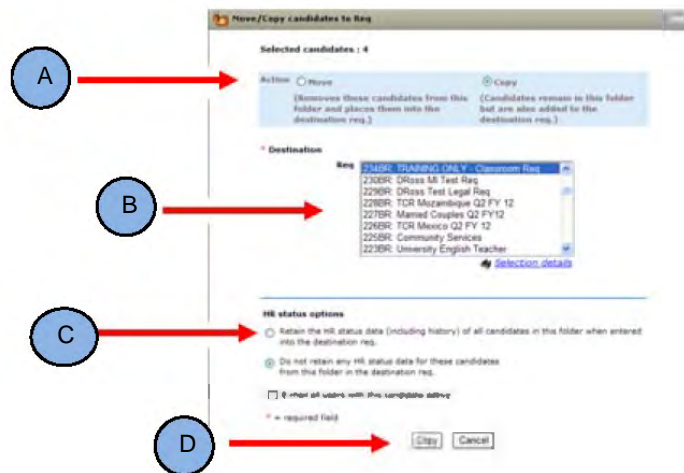


### Section 8.3: How to Move or Copy:

1. Follow steps 1-3 from previous page, then select req folder.
2. Once the req folder is selected, the search results display candidates in that req in a req output grid.
3. In the left toolbar ("Actions"), click the **Move/Copy to req** button. (not Move/Copy to folder)



4. The **Move/Copy candidate to req** page is displayed. Moving or copying the Candidate to the right req is an important step. See Chapter 4, Getting Started for information on this step from the candidate processing perspective.



When working with the Move/Copy option, it is important to note the following:

#### A. Action Radio Buttons (Copy or Move):

- The copy function allows the Candidate to remain in the original req folder and also be added to the destination req folder. The system will default to Copy.



- The move function moves the Candidate from the original req folder and places them into the destination req folder. *Caution: The candidates do not remain in the original req folder after they are moved.*
- *Do not forget – For a nomination, always move candidate to a JSR, MCR or the Medical Pending Req prior to updating the HR Status. For all other statuses you can change the status and then Move or Copy.*

**B. Destination:** This section allows you to select the destination req, the end result of the copy/move action.

**C. HR Status Options:** Always retain HR Status data. To do this, click the radio button for **Retain the HR status data (including history) of all candidates in this folder when entered into the destination req.** By retaining the HR Status, (e.g. for recruiters) they can confirm that the nomination cap has not been reached before the Candidate's status is changed. Once the nomination cap has been met, if users attempt to move other candidates into that req it will result in an error message.

**D. Copy or Move Button:** The top section (A) action radio buttons selects what action will be taken. The bottom section (D) actions buttons require you to select the action to be executed (copy or move) or cancel (close the page). Selecting this copy or move button will execute the action. Once the top section (A) action radio buttons is selected the bottom section (D) action buttons will change to copy or move depending on what is selected in (A).



You cannot just move or copy a Candidate. There are candidate processing steps conducted in each req. *Example: Before a Candidate can be moved into a JSR many processes in the Recruiter Req must be completed. For example, a Candidate must have three references sent to Peace Corps. To verify the references are completed, access the Candidate's Talent Record and select the Forms [Add/View](#) hyperlink.*

### Test Your Knowledge

Answer the following questions "True or False"?

1. The Move function allows the candidate to remain in the original folder.
2. Candidates should never be moved into a folder until the HR Status is updated.
3. Candidates can be placed in a JSR when 1 of the 3 required references has been completed.
4. Candidates are copied from the Evergreen to the RRO.
5. Candidates are moved from the RRO to a JSR.



## Chapter 9: Candidate Talent Record

This chapter reviews accessing a Candidate Talent Record (Talent Record), working with actions and options within a Talent Record, and viewing the Candidate's Gateway Questionnaire (GQ) - Job Response.

The Talent Record offers DOVE users the ability to:

- View Candidate information all in one place
- Compare candidates
- Update basic information (address, phone number, email, etc)
- Upload Forms, Attachments and Communications
- View HR Status
- eLink Forms and Talent Records to other Peace Corps DOVE users or others

### Section 9.1: Talent Record

The first time a Candidate applies, a Talent Record is created within DOVE. Every Candidate has a Talent Record. If the Candidate applies with a different name and email address, a new Talent Record would be created.

Talent Records provide access to all the necessary information to process a Candidate, such as Gateway Questionnaire responses, HR Status, Actions Log (records changes to a Candidate in DOVE), forms, communications, and resumes/CVs.

When viewing a Talent Record, remember that HR Status updates are made from the req output grid. Users can access the Talent Record multiple ways.

1. Perform a req search and get to the chosen req folder.
2. Open the orange req folder to view the list of candidates within that req.
3. To view a Talent Record, **click the candidate's name**.

	Select all	Name	Viewed	Notes	Forms	HR status	Candidate type	HR status (click to update)	HR status date	Updated by	Email
1	<input type="checkbox"/>	Jones, Mary	✓	+	📄	🔴	RPCV	Application Complete	29-Nov-2011	Zdemo, Training02	
2	<input type="checkbox"/>	Jones, Walter		+	📄	🔴	Active	0-Filed	29-Nov-2011	Zdemo, Training02	
3	<input type="checkbox"/>	Jones, William		+	📄	🔴	Inactive	0-Filed	29-Nov-2011	Zdemo, Training02	info17744@pe
4	<input type="checkbox"/>	Smith, Bonnie		+	📄	🔴	RPCV	0-Filed	29-Nov-2011	Zdemo, Training02	
5	<input type="checkbox"/>	Smith, Douglas		+	📄	🔴	RPCV	0-Filed	29-Nov-2011	Zdemo, Training02	
6	<input type="checkbox"/>	Smith, James		+	📄	🔴	RPCV	0-Filed	29-Nov-2011	Zdemo, Training02	
7	<input type="checkbox"/>	Smith, Larry		+	📄	🔴	RPCV	0-Filed	29-Nov-2011	Zdemo, Training02	



4. The Talent Record for the selected Candidate appears.

Talent Record: Jones, Mary

40780: Forestry

Address 1: Location: Home phone: Email: **1**

Candidate type: BPCV  
HR Status: Application Complete  
HR status date: 29-Nov-2011  
HR status updated by: Zdemo, Training02

Notes: Add/View  
Forms: Add/View  
Communications: Send/View  
Attachments: Add/View

Viewed (this req): 29-Nov-2011  
Last viewed (global): 29-Nov-2011: 40780  
Last viewed (global) by: Zdemo, Training02  
Original date loaded: 20-Sep-2011

Employer: N/A  
Position held: N/A

Degree: N/A  
Educational institution: N/A  
GPA: N/A

Contact Details: Resume/CV: Cover Letter: Experience/Education: **2**

Languages: English (VS)  
Mary L Jones  
ZZ No Country

Candidate's location field: 453632547

Submission History: Action Log: **3**

Action	Date	Action by	Details	Name/Type	From	To	Folder
HR Status - Updated	29-Nov-2011	Zdemo, Training02		Current Status	Application Received	Application Complete	40780:Forestry
HR Status - Updated	29-Nov-2011	Zdemo, Training02		Status History	0-Filed	Application Received	40780:Forestry
HR Status - Updated	29-Nov-2011	Zdemo, Training02		Status History	0-Filed	0-Filed	40780:Forestry
Added to Folder	29-Nov-2011	Zdemo, Training02			0-Filed	0-Filed	40780:Forestry
Form Added	20-Sep-2011	Integration, System	Form ID: 542422	PCV Previous Peace Corps History Form			
Form Edited	20-Sep-2011	Integration, System	Form ID: 542422	PCV Previous Peace Corps History Form			

The Talent Record consists of three sections:

1. The Scrolling Ribbon
2. The Candidate Information Area
3. The Action Log



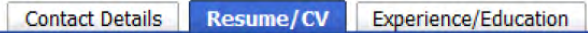

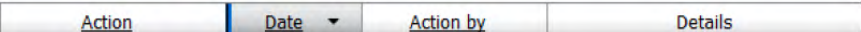








## Section 9.2: Talent Record Options

The three sections of the Talent Record hold many options. The Actions Button allows most of the options to be performed with a single click.

The below table reviews the three main sections and other buttons in the Talent Record.

Option	Description
<b>Scrolling Ribbon</b>	Panes of Candidate information. Use the left and right arrows on the ribbon to view additional panes.    Drag and drop panes to desired locations.
<b>Candidate Information Area</b>	Displays a Candidate's Contact Details, Resume/CV, and Experience/Education in three tabs.  Clicking on any tab will fill the window with the information.
<b>Action Log</b>	The <b>Action Log</b> displays in grid format, columns of information which include all actions taken for this Candidate in relation to where they are in the candidate process. Use the scroll bar to view all information in the Action Log. The viewing size of the Action Log can be changed by dragging the blue bar or clicking the arrow.    The second tab of the Action Log is the <b>Submission History</b> . This displays links to resumes/CVs the candidate has submitted, along with the date of the submission. To view a change, click the link in the Submission column hyperlink <a href="#">Current</a> .
<b>Actions Button</b>	Complete specific actions from within the Talent Record, such as sending a communication to the Candidate. Select Actions  and then select from the drop down menu.
<b>Hyperlink</b>	When an item appears as a blue underlined link, click it to take an action.  For example, the hyperlink to view information or take an action for Forms is this → <a href="#">Forms: Add/View</a> .
<b>Print</b>	Clicking this  button allows you to print either the Contact Information, Resume, Experience/Education section or Action Log.
<b>Edit</b>	Clicking this  button allows you to edit the Talent Record. The edit button allows you to update address (contact information), experience, and education information that displays in the Resume/CV tabs.
<b>Search</b>	Search allows you to locate specific types of actions in the log, such as a req, a form or an HR Status. 
<b>Filter</b>	Provides options for filtering and organizing information within the Action Log.



### Section 9.3: Using the Actions Button

Below is a list of options that can be taken when clicking the Actions button within the Talent Record.



Note that the asterisks (\*) indicate that this option is not available at this time. Please disregard these items. User privileges will also limit which Actions button options are available to each user type.

- Send eLink (see Chapter 14, eLinks in DOVE)
- Send Candidate Communication (see Chapter 12, Communications in DOVE)
- Forward via Email\*
- Add Note (see details on how to add a note below)
- Add Form (see Chapter 13, Forms in DOVE)
- File to Req\*
- File to Folder\*
- Add to Social Source\*
- Print Resume/CV
- Prepare for Bulk Printing\*
- Upload Attachment
- Talent Match



Please note, if viewing the Talent Record when not in a req folder, or when multiple candidates are selected, some actions will be disabled under the Actions menu.

Actions button options are detailed above. Importantly, a notes option is available from the Talent Record scrolling ribbon and Actions Button.



Notes in DOVE: Notes should never contain protected health information (PHI) or personally identifiable information (PII). This information is in the Health History Form and is provided directly to the medical office. Notes should never contain any information about a Candidate's race, creed, ethnicity, or religion. This information is in the Racial and Ethnic Form provided by the Candidate.





## To add a note

### From Notes Hyperlink:

1. Navigate to a Talent Record.
2. Click on the Notes [Add/View](#) hyperlink.
3. The Note pop-up window appears. This window allows users to add, edit, and delete Notes. Additionally, you can see any previous Notes related to the Candidate.

Add notes for Doe, Jane					
Actions					
	Note date	Added by	Note text	Edit note	Delete
<a href="#">+ Add note</a>	16-Dec-2011	Zdemo, Training04	Waiting on Candidate interview to be scheduled		

Close

4. From this pop-up window, users can also add notes. Users will see the green plus sign on the left side to add a note.

[+ Add notes for Doe, Jane](#) [? Help](#)

[\(Back to view notes\)](#)

Enter the text of your note below. Add a 'Reminder date' if you would like this candidate to appear on your 'To do' list for that date.

Waiting on 3rd Reference

Maximum entry: 64kb

☒ Public note ☐ My note (private)


Reminder date 29 Jan 2012

Save Clear Cancel

5. From the pop-up users can add the note information and a date. The note allows you to set the note to "My note" or "Public Note." "My note" allows only you to see the note, while "Public Note" allows it to be viewed by those that can view this Candidate.
6. Adding a date to the note allows it to pop-up as a task on the date indicated.



Notes offer an easy way to add a comment to Candidate's Talent Record; however, it is not recommended to use this feature for task planning. Utilize MS Office features for those tasks. In addition, never put anything in a note that is not appropriate for sharing with the public. All Peace Corps records, including "My Notes" can be FOIAed.

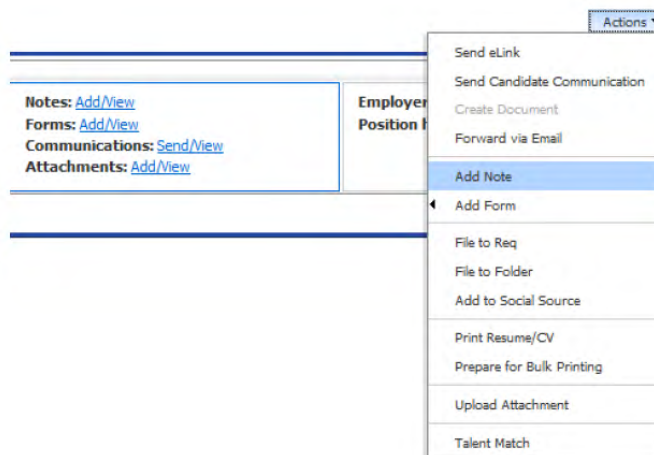
7. Once a note is added you will see a  yellow Note icon in their output grid information.
8. To view a note, click on the Note icon in the req output grid or Notes [Add/View](#) hyperlink in the Talent Record and the note will pop up.

25					<a href="#">External</a>		MT	15-Jun-2011	<a href="#">Doe, Jane</a>
----	--	--	--	--	--------------------------	--	----	-------------	---------------------------



9. When viewing the note, users can also edit the note information.

### From Talent Record Actions Button:

1. A Note also can be added from the **Actions Button** in a Talent Record.
2. Once selected, follow steps above to **Add Note**.




### From Req Output Grid:

A Note can also be added from the req output grid, by clicking on the  **Add Note** icon and following the instructions above. Existing notes can be viewed/edited by clicking on the note icon but a  is displayed in that column if no note exists yet.



Add a Note

<a href="#">Appleseed, Jenny</a>	03-Nov-2011	PA	✓				<a href="#">Active</a>
<a href="#">Appleseed, Johnny</a>	03-Nov-2011	MA	✓				<a href="#">Active</a>

View a Note



## Section 9.4: Viewing Multiple Candidates

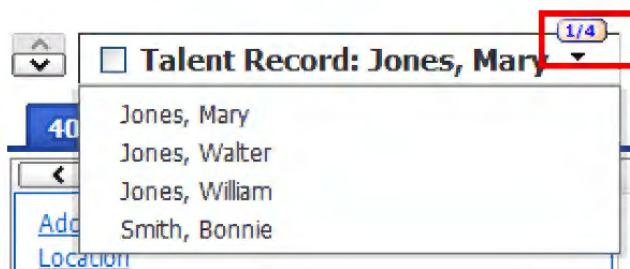
Viewing multiple candidates allows you to compare candidates. To compare multiple candidates you must first perform a search for the req the candidates are located in that you want to compare.

1. Open the req folder.
2. From the req folder, **select all candidates of interest** by placing a check in the box next to the Candidate's name.



Select all	Name	Viewed	Notes	Forms	HR status	Candidate type	HR status (click to update)	HR status date	Updated by
<input checked="" type="checkbox"/>	Jones, Mary	✓	+		1	RPCV	Application Complete	29-Nov-2011	Zdemo, Training02
<input checked="" type="checkbox"/>	Jones, Walter		+		0	Active	0-Filed	29-Nov-2011	Zdemo, Training02
<input checked="" type="checkbox"/>	Jones, William		+		0	Inactive	0-Filed	29-Nov-2011	Zdemo, Training02
<input checked="" type="checkbox"/>	Smith, Bonnie		+		0	RPCV	0-Filed	29-Nov-2011	Zdemo, Training02
<input type="checkbox"/>	Smith, Douglas		+		0	RPCV	0-Filed	29-Nov-2011	Zdemo, Training02

3. Click **View** on the Actions toolbar (left toolbar)
4. You will see the first Candidate's information displayed in the Talent Record. To expand the list of candidates, click the arrow under the number of candidates indicator (highlighted below as 1/4).



5. To move from this candidate to one of the other records, use the up/down arrow located to the left of the current name.
6. Click on the X at the top of the page to return to req folder displaying candidates.

## Test Your Knowledge

Answer the following questions "True or False"?

1. Once a Candidate applies a Talent Record must be manually created.



2. The Talent Record can be used to view communications sent to candidate.
3. It is not possible to view multiple candidates Talent Records at once.



## Section 9.5: Reviewing the Gateway Questionnaire (GQ) Responses

Once the candidates have been copied into the appropriate Regional Recruitment Office Req (RRO), you will need to review the Gateway Questionnaire prior to moving the candidate into the appropriate Recruiter Req.

**To view Candidate GQ responses:**

1. **Select Candidate(s)** from the appropriate req folder.
2. **Click the Scrolling Ribbon** and **select the Forms** hyperlink [Add/View](#).
3. **Click the** Gateway Questionnaire job response – Peace Corps Evergreen Req hyperlink from the list of forms.
4. You can also select the form from the Action Log hyperlink of the Gateway Questionnaire Job Response – Peace Corps Evergreen Req form (see below).

Submission History		Action Log						Print
Action	Date	Action by	Details	Name/Type	From	To	Folder	
Added to Folder	11-Nov-2011	Manager, Automation		Administrative Use Only)		0-Filed	<a href="#">2918R:New York RRO 2</a>	
Form Added	11-Nov-2011	Submission, System	Form ID: 548719	<a href="#">PCV Gateway Questionnaire</a>				
Form Added	11-Nov-2011	Submission, System	Form ID: 548718	Racial and Ethnic Data Form				
Form Added	11-Nov-2011	Submission, System	Form ID: 3661	<a href="#">GQ Job Response- Peace Corps Evergreen Req</a>			<a href="#">98BR:Peace Corps Volunteer</a>	

5. The GQ responses page is displayed. Use the scroll bar to view the entire response form.

**Gateway Questionnaire Job Response** - Peace Corps - Evergreen Req/98BR: Peace Corps Volunteer for Appleseed, Jake

PCV 7.5

[To Questions and Answers](#)

test

Codes: 98BR PCV000

**Expectations**

**Core Expectation Acknowledgment** I have read these expectations and understand that I am responsible for meeting

Are you a U.S. citizen (by birth or naturalization), or do you expect to become a naturalized citizen in the next 12 months? Yes

Please provide your place of birth (City, State, Country) Philly, PA

Are you at least 17 years of age? The Peace Corps cannot invite you until you are at least 18 years old. Yes

What most inspired you to apply to the Peace Corps? Partners in Higher Education

Please select a specific Partner in Higher Education (for example, Thurgood Marshall College Fund). Thurgood Marshall College Fund (TMCF)

**Contact Information**

[Resume](#)

6. The GQ response form is not editable. To exit, scroll to the bottom of the form and click the close button. Or, "X" out of the window by pressing the "X" on the top right corner.



## Chapter 10: Searching in DOVE

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This chapter focuses on conducting searches within DOVE. There are two main types of searches in DOVE – quick and advanced searches.

The chapter will review how to conduct –

- Quick Searches
  - Searching for Reqs
  - Searching for Candidates
- Advanced Searches
  - Searching for Reqs
  - Searching for Candidates

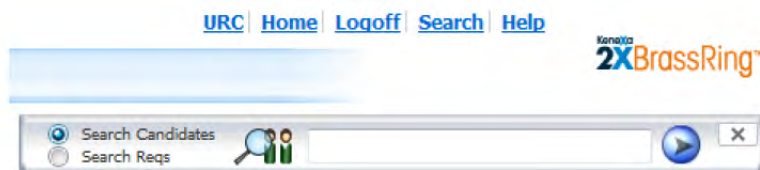
This chapter will also focus on the basics for performing a search and obtaining results. In Chapter 11, Managing Grid Displays, formatting and rearranging the output grids will be discussed

### Section 10.1: Quick Search

The Quick Search allows you to find a specific Candidate or requisition (req) from the DOVE Dashboard.



Note: All user types can do a Quick Search for both reqs and candidates.



#### Accessing the Quick Search function:

1. If the Quick Search panel is not visible, **click the Search link** in the top toolbar.
2. **Select either Search Candidates or Search Reqs** radio button.
  - a. If searching for candidates, type in the candidates' name for Search Candidates. You can search by listing part of a last name or, if you are looking for a specific candidate, by searching use the convention: "Last Name, First Name."
  - b. If searching for a req, type in a part of req name, specific req ID/req number or keywords.
3. **Click the blue arrow button** to conduct the search.



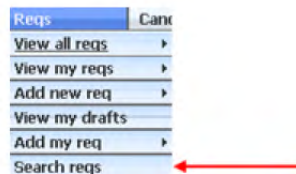


## Section 10.2: Advanced Search - Searching Reqs

Many times it will be necessary for users to search for reqs in which candidates can be copied or moved into during their processing. This involves more advanced searching.

To run an advanced search for a req:

1. Click **Reqs > Search**



2. The Search page is launched. You can search for requisitions by using the drop down window located in the **gray bar area** and/or select the search criteria from the available fields in the page below.
3. Users will often select a req and then set the search criteria. For example, if a Recruiter wants to search for a PCV Job Specific Req (JSR), they will should select the PCV Job Specific Req from the “All Req Forms” field drop down menu before setting the rest of their search criteria.

The search criteria page changes depending on the type of Req you are searching for. Basic search criteria for all Reqs may include:

- Type of form (req form)
- Status of the req
- Auto req ID
- Request Type (assignment area)
- Title (title of req)
- Manager
- Owner
- Key Dates
- And, description (enter keywords)

There are several req types and selecting the right req form (req type) from the gray bar enables the user to search more efficiently for the req information they are seeking in the search.



Note: It is important to make sure to select the right req form (req type) in the gray bar before performing a search.



From the Search reqs page, see how All req forms is outlined in red. This is the gray bar search area. If the search is performed as selected, all reqs will be in the search results page.

When conducting a search in the form field, click on Selection details to see all available fields in this section. It is a good rule of thumb if you have a long list of fields, to use Ctrl+F to find the right field.

If a user selects the gray bar and scrolls to PCV Job Specific Req, then the search results page will only show results for the selected req type. See below how PCV Job Specific Req has been selected.

4. Choose the rest of your search criteria from the applicable fields. Click the **Search** button. Search results are displayed.

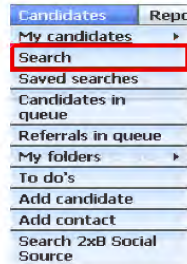
Select all	Title	Positions Remaining	Req folder	Total candidates	Manager	Owner	Agency	Date created	Auto req ID
<input type="checkbox"/>	Forestry	1		0	Zdemo, Training02	Zdemo, Training02		29-Nov-2011	<a href="#">409BR</a>
<input type="checkbox"/>	Forestry	1		11	Zdemo, Training02	Zdemo, Training02		29-Nov-2011	<a href="#">407BR</a>



## Section 10.3: Advanced Search - Searching for Candidates

To complete a search:

Click **Candidates > Search**.



The **Search** page is launched. Enter the search criteria in the available fields.

The Search page interface includes a top navigation bar with buttons: Search, Save search, Edit search fields, Edit output fields, and a dropdown for Load saved search. Below this is a sub-header with tabs: Search criteria (selected), View search criteria, Search, Clear, Revert to last search, and Candidates per screen: 50.

**Search criteria section:**

- Select candidate type(s):** A dropdown menu with options: All, Active, External, Inactive, OMB - Demo. A link for Selection details is provided.
- Last name:** A text input field.
- Date last loaded:** Includes a Days back dropdown (set to 30) and date range selectors for From (16 Nov 2011) and To (16 Dec 2011), each with a calendar icon and a Selection details link.
- Source Code:** A dropdown menu with options: All, AmeriCorps Teach for America, An, 2XSOCIALSOURCE: Social Source, Alpha\_Kappa\_Alpha\_Sorority: Alpha K, Alpha\_Phi\_Alpha\_Fraternity: Alpha Phi. A Selection details link is provided.
- Job Code:** A dropdown menu with options: All, None, 100: 100-Forestry, 103: 103-Protected Areas Management, 104: 104-Environmental Education. A Selection details link is provided.
- Job Req:** A text input field with a List >> button.
- Skills/keyword:** A text input field.



**Search filters section:**

- City:** A text input field with a dropdown arrow and a B button.
- Zip/postal code:** A text input field with a dropdown arrow and a B button.
- Employer:** A text input field with a dropdown arrow and a B button. Below it are radio buttons for All employers (selected) and Most recent employers.
- Position held:** A text input field with a dropdown arrow and a B button. Below it are radio buttons for All positions (selected) and Most recent position.
- Degree:** A dropdown menu with options: All, Associates, Bachelors, Certificate, Doctorate. A Selection details link is provided. Below it are radio buttons for All degrees (selected) and Most recent degree.
- Educational institute:** A text input field with a dropdown arrow and a B button. Below it are radio buttons for All institutes (selected) and Most recent institute.

- Candidate Type
- First Name
- Last Name
- Date Last Loaded
- Job Code
- Job Req
- Proximity
- City
- Zip/ Postal Code
- Skills/Keyword
- Employer
- Position Held
- Degree
- Field of Study
- Education Institute
- Grad Year



- HR Status
- HR Status Excludes
- All Assignment Areas Qualified for

Edit Search Fields is a button on the top of the screen. This enables you to add/remove fields from the search criteria page. Use the **<< Add** and **Remove >>** buttons and move up  and move down  buttons to edit the fields for your search.

**Edit search fields** Help

Candidates per screen: 50 Edit My regions

Select a field and click 'Add' or 'Remove' to move it from one column to the other. When you are finished click 'Save'.

**Selected values (left)**

Move up Move down

Last name  
Date last loaded  
Source Code  
Job Code  
Job Req  
Skills/keyword

[Selection details](#)

Fields currently on your search results

**Available values**

Add Remove

Candidate ref num  
Country  
Email  
Email source  
Field of study  
First name  
Folders  
Folders: Excluded  
Forms  
Forms: Excluded  
GPA  
Grad year  
Home phone  
How received  
HR Status

[Selection details](#)

Fields you can add to your search results

**Selected values (right)**

Move up Move down

City  
Zip/postal code  
Employer  
Position held  
Degree  
Educational institute

[Selection details](#)

Fields currently on your search results

Save Cancel



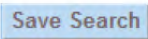
When opening the **Edit Search** option, make sure to maximize the window that pops up. There are three key pieces to this option and they will not always be visible due to your browser's default settings.

Once done editing the fields, click save and you will return to the search criteria page.

Click the search button.  The Search Results page is launched.

select all	Name	Viewed	Notes	Forms	HR status	Candidate type	HR status (click to update)	HR status date	Updated by
<input type="checkbox"/>	<a href="#">James, Marc</a>	✓	+			<a href="#">SPCV</a>	<a href="#">Application Complete</a>	29-Nov-2011	Zdemo, Training02
<input type="checkbox"/>	<a href="#">James, Walter</a>	✓	+			<a href="#">Active</a>	<a href="#">0-Filed</a>	29-Nov-2011	Zdemo, Training02
<input type="checkbox"/>	<a href="#">Jones, Robert</a>	✓	+			<a href="#">Inactive</a>	<a href="#">0-Filed</a>	29-Nov-2011	Zdemo, Training02
<input type="checkbox"/>	<a href="#">Smith, Denise</a>	✓	+			<a href="#">SPCV</a>	<a href="#">0-Filed</a>	29-Nov-2011	Zdemo, Training02
<input type="checkbox"/>	<a href="#">Smith, Douglas</a>		+			<a href="#">SPCV</a>	<a href="#">0-Filed</a>	29-Nov-2011	Zdemo, Training02
<input type="checkbox"/>	<a href="#">Smith, James</a>		+			<a href="#">SPCV</a>	<a href="#">0-Filed</a>	29-Nov-2011	Zdemo, Training02
<input type="checkbox"/>	<a href="#">Smith, Larry</a>		+			<a href="#">SPCV</a>	<a href="#">0-Filed</a>	29-Nov-2011	Zdemo, Training02
<input type="checkbox"/>	<a href="#">Smith, Linda</a>		+			<a href="#">SPCV</a>	<a href="#">0-Filed</a>	29-Nov-2011	Zdemo, Training02
<input type="checkbox"/>	<a href="#">Smith, Robert</a>		+			<a href="#">Active</a>	<a href="#">0-Filed</a>	29-Nov-2011	Zdemo, Training02
<input type="checkbox"/>	<a href="#">Williams, John</a>		+			<a href="#">SPCV</a>	<a href="#">0-Filed</a>	29-Nov-2011	Zdemo, Training02
<input type="checkbox"/>	<a href="#">Williams, Marc</a>		+			<a href="#">SPCV</a>	<a href="#">0-Filed</a>	29-Nov-2011	Zdemo, Training02

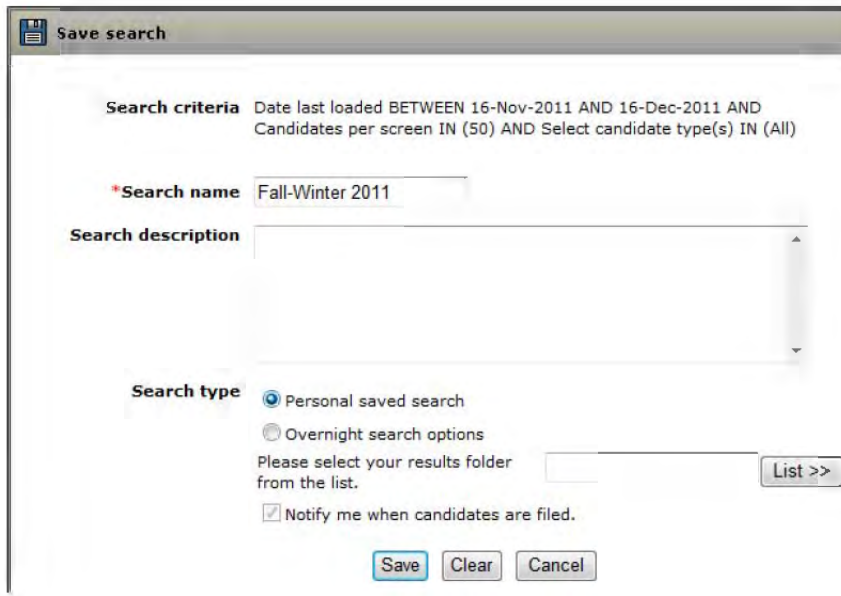


If you have edited the search fields or want to preserve this search, click the **Save Search** button. 

The Save Search page is launched. **Enter a Search name.** A Search description can also be entered.

Make sure to select **Personal saved search.**

To locate saved searches, go to **Candidates** tab < **Saved Searches.**



Do not use the **overnight search** option.





## Section 10.4: Boolean Searches

### Boolean Searches

1. Select Search under the Candidate tab
2. The search criteria screen will display.

3. Any of the fields with a **B** symbol allow for Boolean terms.
4. See below table for common Boolean terms to be utilized in DOVE's candidate searches.

Boolean Terms	Example	Description
AND	Teacher AND Health	If entered in the Positions held field will extract candidates with both Teacher AND Health entered in their experience.
OR	98102 OR 98101	If entered in the Zip/postal code field will extract candidates who have entered either 98102 OR 98101 as their zip code.
NOT	NOT 98102	If entered in the Zip/postal code field will only extract candidates who have NOT entered 98102 as their zip code.



<b>Parentheses ( )</b>	(Teacher OR English Tutor) AND Health	If entered in the Positions held field will extract candidates with either Teacher OR English Tutor experience AND Health experience.
<b>Wildcard *</b>	9810*	If entered in the Zip/postal code field will extract candidates with zip codes starting in 9810, i.e. 98100, 98101, 98102, 98103, 98104, 98105, 98106, 98107, 98108, 98109.

### *Test Your Knowledge*

*Answer the following questions “True or False”?*

1. Use Quick search to locate non-system users.
2. Recruitment will search reqs in order to locate the correct req folder to move candidates into.
3. Quick search allows you to search for requisitions, candidates and communications from the Quick search box located on the DOVE Dashboard.





## Chapter 11: Managing Grid Displays

This chapter focuses on using the various output grid management options to determine how information is presented. The various options available allow users to tailor the search results to their specific functional role needs and personal preferences.

This chapter details how to –

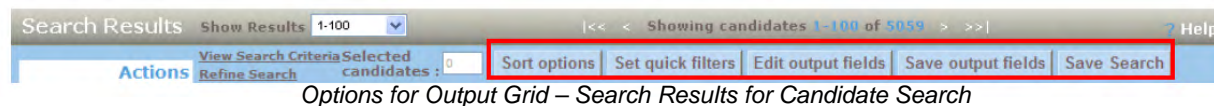
- Manage Output Grids
- Sort and Filter Options

### Section 11.1: Output Display Management Overview

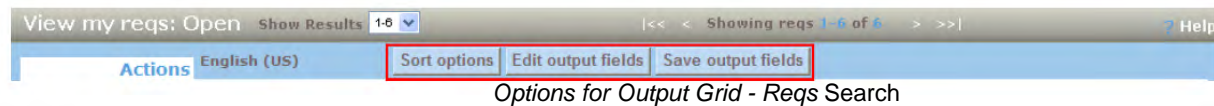
As users begin setting up searches or begin reviewing reqs (e.g., “My Open Req”), they will have the ability to manage output grid options. The column headings that reside at the top of each output grid display the different kinds of information associated with candidates (or reqs) and are called output fields. Output fields are seen on req screens, search screens and search result screens. Output fields populate the output grids.



There are candidate and req output grids; they look and function similarly, however, users should only make changes to candidates from the req output grids.



*Options for Output Grid – Search Results for Candidate Search*



*Options for Output Grid - Reqs Search*



*Options for Output Grid – Saved Search (Candidate Search)*

Output fields are based on the information that is parsed from resumes/CVs and from fields on the Req and Candidate Forms.



## Section 11.2: Selecting Output Fields

After conducting a search for reqs or candidates which column headings are displayed can be modified using these steps: (*Search results used for example*)

1. Select the blue **Edit output fields** button at the top of the output grid.
2. In the **Available values** list in the window on the left, select the fields to add to the output criteria.
3. Click **Add >>** to move them to the **Selected values** list in the window on the right.
4. Highlight and click **Remove <<** to return them to the **Available values** list.

5. **To reorder fields**, select the value to be moved in the **Selected values window** and click the **Move up** or **Move down** button.

Click **Save**.



## Section 11.3: Output Grid Management Options

In addition to editing output fields, DOVE offers additional management of Candidate and req output grids:

The screenshot shows a 'Search Results' window with a table of candidates. The table has columns: Select all, Name, Viewed, Notes, Forms, HR status, Candidate type, Employer, Position field, Location, and Date last loaded. Several icons are highlighted in red boxes in the header row: a double triangle for sorting, a funnel for filtering, and a horizontal/vertical pushpin for column management.

Select all	Name	Viewed	Notes	Forms	HR status	Candidate type	Employer	Position field	Location	Date last loaded
<input type="checkbox"/>	<a href="#">ADAMS, JOHN</a>		+			Active			MA	03-Nov-2011
<input type="checkbox"/>	<a href="#">Adam, Sara</a>		+			Active			LA	11-Nov-2011
<input type="checkbox"/>	<a href="#">Smith, James</a>		+			Active			NY	04-Nov-2011
<input type="checkbox"/>	<a href="#">Smith, Linda</a>		+			Active			NY	04-Nov-2011
<input type="checkbox"/>	<a href="#">Smith, John</a>		+			Active			MA	03-Nov-2011

- Alphabetizing the options in a column by clicking the double triangles. The top triangle will appear in black identifying the options are listed in alphabetical order from A to Z. Click the triangles again to list the items in the column in order from Z to A. The bottom triangle will appear black to denote this. When on a date column, click once to order from oldest to newest and click twice to order from newest to oldest.
- The funnel appears in candidate searches and allows users to sort by candidate type.
- Click the horizontal push pin in the column header to move a column to the far left of the output grid. Clicking the vertical push pin in the column header again will allow other columns to move to the far left.
- Re-order columns by right clicking on the heading of the selected column and dragging and dropping where desired, accept to the left of columns with the vertical push pin . After dragging and dropping wait a second for the page to reload.
- Re-size columns by clicking on the border between column headers and sliding the mouse to the right or left. If you resize small enough the column can be hidden (similar to MSExcel). To make the column appear again resize by pulling to the right.

### Test Your Knowledge

Answer the following questions “True or False”?

- Output grids provide an overview of all activity within DOVE.
- Columns on a grid can be resized by sliding the mouse left or right and dragging the column border.
- Clicking a vertical pushpin in a column allows you to freeze the column heading.



## Section 11.4: Sort Options and Set Quick Filters

The candidate output grid has two additional buttons: Sort options and Set quick filters. Sort options allow you to configure multi-sorted columns and column sort defaults. Set quick filters allows you to configure quick filter list options by HR Status and/or Candidate type columns.

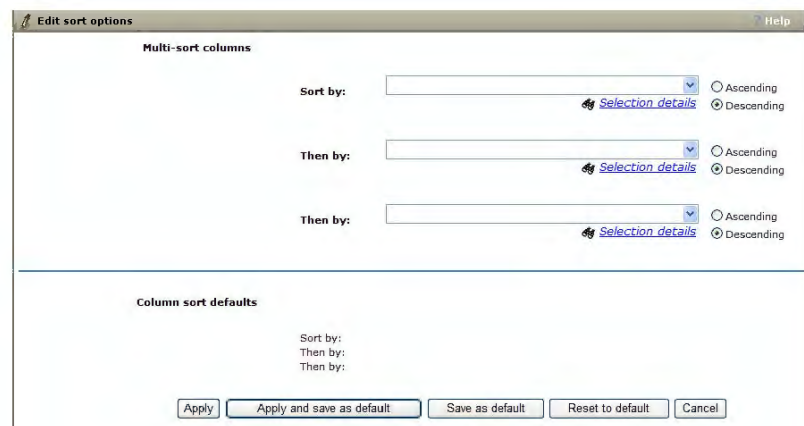
### To edit the sort options:

1. From the display of search results, click the **Sort options** button.



The screenshot shows the 'Search Results' interface. At the top, there are tabs for 'View Search Criteria', 'Selected candidates', 'Sort options', 'Set quick filters', 'Edit output fields', 'Save output fields', and 'Save Search'. The 'Sort options' tab is highlighted with a red box. Below the tabs is a table of search results with columns: Select all, Name, Viewed, Notes, Forms, HR status, Candidate type, Employer, Position held, Location, and Date last loaded. The table contains five rows of candidate data.

2. Select up to three different criteria for sorting the output grid display, using the radial button to indicate Ascending or Descending (the default) order.



The 'Edit sort options' dialog box is shown. It has two main sections: 'Multi-sort columns' and 'Column sort defaults'. In the 'Multi-sort columns' section, there are three rows for 'Sort by:', 'Then by:', and 'Then by:'. Each row has a dropdown menu and two radio buttons for 'Ascending' and 'Descending'. The 'Descending' radio button is selected for all three rows. In the 'Column sort defaults' section, there are labels for 'Sort by:', 'Then by:', and 'Then by:'. At the bottom, there are five buttons: 'Apply', 'Apply and save as default', 'Save as default', 'Reset to default', and 'Cancel'.

3. Use the **Sort by:** menu to select the primary criterion to sort the output grid.
4. Use the **Then by:** menus to add secondary and tertiary sorting criteria. This is useful if your primary Sort by criteria is very general (such as candidate status).
5. Next, choose one of the following:
  - **Apply** – this saves your selections in only the current session in DOVE
  - **Apply and save as default** – your choices apply to your current session and are defaulted for your subsequent log ins.



- **Save as default** – page stays open and your choices are defaulted for your subsequent log ins.
- **Reset to default** – page remains open and the most recently saved column sort default values replace your newly applied changes.



## Chapter 12 – Communications in DOVE

DOVE allows its users to communicate with internal users (other members of their department or another department user within Peace Corps) and external users (STRATs, candidates, recommenders, etc). In some cases communications may request information to be responded to in a form.

This chapter reviews –

- Communications options
- How to manually send candidate communications
- Reviews important tips for sending reference requests

### Section 12.1: Communications

The Communications feature within DOVE provides you with the ability to send standard correspondence (e-mails) to candidates directly from within the system. Based on your user type you may not have access to all of the communication templates listed below.

The types of Communications include:

Type of Communication	Associated Org Group	Notes
LEG Legal Rejection	Legal	
PCV Candidate Ref Number	Placement & Recruitment	To help with paper file transfer to DOVE
PCV FOIA Request	Legal, Placement & Recruitment	
PCV Temporary Reject Letter	Placement & Recruitment	
PLT Application Reactivation email	Placement	
PLT Applicant Withdrawal	Placement	
PLT Defacto Warning	Placement	
PLT Invitation Letter	Placement	
PLT Medical Update	Placement	
PLT Next Steps Email After Invitation	Placement	Auto-generated
PLT Overage Retention Email	Placement	
PLT Permanent Rejection letter	Placement	
PLT Transcript Request	Placement	
REC Applicant Withdrawal	Recruitment	
REC Applied Too Early	Recruitment	
REC Defacto Reactivation Essay Request	Recruitment	
REC Defacto Warning	Recruitment	
REC Geo Preference	Recruitment	
REC Interview Confirmation	Recruitment	
REC Major Life Change	Recruitment	
REC Need More Experience	Recruitment	
REC Only One Spouse has Applied	Recruitment	
REC Overseas Applicant	Recruitment	



REC Reference Email 1	Recruitment	
REC Reference Email 2	Recruitment	
REC Reference Email 3	Recruitment	
REC Masters International Nomination Letter	Recruitment	
REC Nomination Letter for Nomination Cleared	Recruitment	
REC Nomination Letter for Couples	Recruitment	
REC Nomination Letter for Med Pending	Recruitment	Auto-generated
REC Nomination Validation Req'd letter	Recruitment	
REC RC Intel Email	Recruitment	
REC RC REJ non Competitive	Recruitment	
REC RC REJ no programs	Recruitment	
REC RC REJ suitability letter	Recruitment	
REC Rewrite Cross Cultural Essay	Recruitment	
REC Rewrite Motivation Statement	Recruitment	
REG Staging Form Reminder	Regions & Staging	
Staging Email	Staging	
Staging Email – Yellow Fever	Staging	





## Section 12.2: Sending Communications to Candidates

As you update the HR Status for candidates, specific HR statuses trigger the system to send out communications to the Candidate. Some are automatic communications, but most involve users manually sending a communication to a Candidate.

To send a communication directly to a candidate manually:

1. Select the check box of the candidate(s) you wish to send the communication to from within the req folder or from within a Talent Record.
2. Click the Send communication link in the Actions list from the Req folder. While viewing a Talent Record, use the Actions button or select the Communications send/view link.
3. The Communications page appears. Select the email communication you wish to send from the E-mail template field, and then click Go. *Please note: Letter Templates are not used.*

4. The Send communication page appears. Complete the following:
  - Verify your email address appears correctly in the **From** field.
  - Make any necessary changes to the **Subject** field.
  - To send a copy of this email to yourself or other recipients, enter the appropriate email addresses in the **Cc** and **Bcc** fields.
  - The **Message Body** information is defaulted for the selected email template. Make any necessary changes, including formatting changes using the formatting options. You can also run a spell check.



Send communication

Email Message

\*From: training@peacecorps.gov

Subject: Peace Corps Interview Confirmation

Cc:

Bcc:

This first part of the communication includes the sender and subject information.

MESSAGE BODY

HTML Plain text Spell Check

Text Editing Area

Font Name and Size: Arial 13

Font style: Bold, Italic, Underline

Lists: Bulleted, Numbered

Indenting: Indent Left, Indent Right

Alignment: Left, Center, Right, Justify

Insert Item: Image, Link, Table

Colors: Background Color, Text Color

on an airplane (liquids are fine.)

Interview tips:

- The interview will take between 60-90 minutes. It is a chance for us to assess your suitability for the Peace Corps in general and evaluate your flexibility and your commitment to serving in one of the more than 70 countries that have requested assistance. It is also a chance for us to discuss your regional and assignment interests and any issues you have about service or the application process. Feel free to ask questions.
- The Peace Corps is a professional organization and we expect applicants to conduct themselves in a professional manner during the entire application process. Dress code for the interview is business casual.
- Learn as much about the Peace Corps as you can before the interview. Attend an information session or a returned volunteer panel, where several returned Peace Corps volunteers share their stories.

Link to job(s) on Gateway

Select a Gateway

<< Add

Upload attachments from local file (<4MB)

Browse...

Upload attachments from Talent Record

Selection details

Upload

File Delete

No attached files

Expanded view

The second part of the communication includes an email template and editable message body.

Candidate and merge information

0 records contain errors | 1 candidates selected | ? Help

Candidate data verified, ready to send.

Expand all	Select	Name
<input checked="" type="checkbox"/>		Doe, Jane sdfdsf@sds.com

The last part of the communication includes Candidate and merge information. Unselecting the box allows you to replace the Candidate's e-mail with another e-mail.



If manually sending a reference request, **users must remove the candidate's email address and insert the recipient's email address.**

- To include a link to a Talent Gateway for the Candidate, select the gateway in the **Link to job(s) on Gateway** section (only the Evergreen and PCR Reqs are posted to the Talent Gateway).
- To include an attachment with the email, upload the attachment in the **Upload Attachments** section.
- The email communication may contain fields that the system automatically populates from previously entered information. These are called merge fields.



- For communications, much of the Candidate's information is merged. If a red flag appears next to the Candidate's name in the Candidate and merge information section, then some of the candidate's information is missing.
  - Click the **red flag** to enter or correct any of the merge information.
5. Click the **Preview** button before sending to verify information.
  6. Click **Send**. The system automatically keeps a history of the communications sent to the Candidate in the Talent Record



## Section 12.3: Tips for Sending Reference Requests

It is important to know that three reference requests are electronically distributed and their responses collected by Recruitment before an interview can be scheduled. The references are automatically sent once the Regional Recruitment Supervisor (RRS) has reviewed the file and assigned it to a Recruiter. Once the references are received, the candidate's HR Status automatically updates to References Received and Recruiters will know they can move forward with the interview process.

However, at times candidates will request recommendations from unacceptable or ineligible references. When this occurs recruiters will manually request another reference. The candidate will need to supply the new reference's name and email address to the Recruiter, who will then send the new reference request via eLink directly from DOVE.

The screenshot displays the DOVE system interface for editing a message body. The main window is titled "MESSAGE BODY" and includes a "Text Editing Area" with a rich text editor toolbar. The text content includes a welcome message, a note about the average time to complete the form (30 minutes), and a link to the "Peace Corps Reference Form" which is highlighted with a red box. The sidebar on the right is titled "Merge fields" and contains several sections: "Select variable group", "Link to job(s) on Gateway", and "Include forms to complete". The "Include forms to complete" section lists various forms such as "PCV Disposition Form", "PCV Disposition Form Remind", "PCV Gateway Questionnaire", "PCV Int Assess Couples Form", "PCV Int Assessment Form", and "PCV Invitation Decision Form".

Recruiters will need to navigate to the **Talent Record > Communication** ([Send/View](#)) hyperlink to get to the right template for the reference request. Users will select from the list of Communications one of the following e-mail templates: PCV-Reference Email 1 (Job Supervisor), PCV-Reference Email 2 (Volunteer Supervisor), or PCV-Reference Email 3 (Friend). Once the right reference e-mail is selected, users will be able to edit the e-mail address and information in the template. Users should review the merge tokens to make sure the information has imported correctly.





When selecting PCV-Reference Email 1, PCV-Reference Email 2, or PCV-Reference Email 3 as the email template, Recruitment must manually enter and replace the Candidate email with the email of the reference recipient in order to have the request go to the reference recipient and not the candidate.

The following is an example of the communication that has been sent to a reference on behalf of the Candidate. The recipient of the reference e-mail will click the link to complete the form.

From: dove@peacecorps.gov [Enterprise@trm.brassring.com] Sent: Tue 1/31/2012 2:26 PM

To:

Cc:

Subject: Reference request for a Peace Corps candidate

Peace Corps service in a developing country involves many challenges. It is not for everyone. Therefore, we would appreciate your honest appraisal of the applicant's qualifications to serve. No applicant is selected or rejected on the basis of a single rating; supporting statements are obtained from many sources.

*Peace Corps estimates that the average time to complete this form is 30 minutes, including the time to assemble the information. If you have any questions about completing this reference form, please call your local recruiting office at 800.424.8580, option 1.*

*If you have any comments concerning the accuracy of this estimate and any suggestion for reducing it, please address them to: Peace Corps, Paperwork Reduction Project (0420-0006), 1111 20th St. N.W., Washington, D.C. 20526; and to the Office of Management and Budget, Paperwork Reduction Project (0420-0006), Washington, D.C. 20503.*

Please note that you must complete this form in one session. Clicking "Save" at the bottom of the form will result in the form's submission.

Thank you for completing this important task on behalf of this candidate. If you do not know the candidate well enough to complete the entire form, please email me at [dove@peacecorps.gov](mailto:dove@peacecorps.gov).

Please click on this link to fill out the reference form: [Peace Corps Reference Form](#)

John Doe10  
Regional Recruiter

Click on Peace Corps Reference Form hyperlink to see form.



The reference will then click the [Peace Corps Reference Form](#) hyperlink. The form allows them to electronically submit their reference comments directly to Peace Corps.

[Peace Corps Reference Form for Jones, Mary](#)

? [Help](#)

Peace Corps Confidential Reference Form	
*Applicant's First Name	<input type="text" value="Mary"/>
*Applicant's Last Name	<input type="text" value="Jones"/>
*Reference First Name	<input type="text"/>
*Reference Last Name	<input type="text"/>
Company/Organization	<input type="text"/>
*Address	<input type="text"/>
*City/State/Zip	<input type="text"/>
*Phone Number	<input type="text"/>
Email Address	<input type="text"/>
*Please check one:	<input type="radio"/> A. I will complete this form. <input type="radio"/> B. I prefer to write a narrative in the Additional Reference Letter field at the bottom of this form (Please cover information which is requested in this form. You must still answer the required questions on the form.) <input type="radio"/> C. I do not know the applicant well enough to complete any section of this form.



The Peace Corps Reference Form must be completed in one session.



## Chapter 13: Forms in DOVE

Forms allow DOVE users to gather information from candidates, review information from another process (e.g. the Medical SORT form and Nomination/Medical Process), and advance a Candidate through the process. Based on your user type you may not have access to all forms shown in this manual.

This chapter will cover how to:

- Add a Form
- View a Form
- Complete Forms within the Candidate Process
- Review Key Forms related to the Candidate Process

### Section 13.1: DOVE Forms

You can add, complete and view forms from within DOVE. Forms are used to capture and store different types of information. Examples of forms include; the Gateway Questionnaire-Job Response, disposition, medical, legal, and other candidate process-based forms. Forms can also be added to a Candidate's Talent Record during the candidate process based on their current HR Status.




Here is an example of a form:

The screenshot displays the 'PCV Applicant Assessment Form for Jones, Mary'. At the top right is a 'Link clone form' button. Below the title bar, the form is divided into sections. The first section contains fields for '\* RRO' (with a 'Selection details' link) and '\* Recruiter' (with a 'Selection details' link). The second section, 'Part I - General Applicant Information', includes fields for '\* Applicant First Name' (filled with 'Mary'), 'Applicant Middle Name' (filled with 'L'), and '\* Applicant Last Name' (filled with 'Jones'). It also has a '\* Gender' section with radio buttons for 'Male' and 'Female'. The '\* Availability Date' is shown as a date picker. The 'Marital Status' section has radio buttons for 'Single (never married)', 'Married - planning to serve with a spouse', 'Married - planning to serve without a spouse', 'Divorced or Legally Separated', and 'Widowed'. Below this are fields for 'First Name of Spouse', 'Middle name of Spouse', and 'Last name of Spouse', all filled with 'none'. A note states: '\* All assignment areas the applicant is qualified for. Please list the assignment areas in rank order from most qualified to least qualified. Please only type in the AA number and Comp, separated by commas. (i.e. 144B, 145A)'. The '\* Assignment Preference' section shows a list box with 'Open to All Assignments', 'Agriculture', 'Environment', 'Business', and 'Education', with a 'Selection details' link at the bottom right.






## Elements of Forms

- When a red asterisk displays next to a field on the form, the field is required.
- If a Candidate has a form attached to his/her Talent Record, the forms icon  displays in the list when viewing candidates in the req folder.
-  Blank forms can be sent for someone to complete. This action is called eLink blank form. .

Forms can only be completed or sent from within a req folder.



## Section 13.2: Accessing Forms

To access the Forms option, it is recommended users go to the req output grid. Users can navigate to forms from the forms icon  within the output grid. Users can also access forms through the Candidate's Talent Record, via the Forms hyperlink **Forms: [Add/View](#)**. However, a form can only be added if you have navigated to the Talent Record from a req output grid.

### To navigate to Forms from req output grid to Talent Record:

1. Search reqs
2. Open the req folder to view candidates
3. Click on the Candidate's Forms icon and this takes you to the Forms List, or;
4. Click on the Candidate's name and go to the Talent Record and select the **Forms: [Add/View](#)** hyperlink and this takes you to the Forms list.

Alternatively, external users or candidates may be sent an eLink to fill out a form and will access a form from an e-mail like the one below.

Please complete the following form: PCV Applicant Assessment Form - 407BR : Forestry Inbox | X

trainingdove@gmail.com ENTERPRISE@trm.brassring.com to me [show details](#) 11:44 AM (1 minute ago) [Reply](#)

[trainingdove@gmail.com](#) has eLinked a form for you to complete.

**Jones, Mary**


If you experience a problem with the link above, please copy and paste the following link into your browser:

[https://staging128.brassring.com/etStream/500/Presentation/Template/ASP/Candidate/Forms/AddForm.asp?isgq=@7jmvKabnpHc=&appnv=@Qa8WrdFDvAg=&localeid=@lsSbRwlc1jxKpUy0SbstnA==&mode=@a5PHOySW6Q=&where=@TPEBTmFaU8Z5hrqmRqSygA==&encryptedvalues=@M5dGwpKWk6xH08FIFSEjQ==\\*@QvtxAPFQo/d6Gkk1zovZds8lu8\\$zp5ZlN\\*@M9BYXm6FiuVlodQ0VZlTiQ==\\*@oDVR0Z7Pcbk=\\*@YQ8gaLyXBwscwhAG5ONuDA==\\*@a3RiUFszEso=\\*@7jmvKabnpHc=\\*@XPo1WBzaZuM=\\*@qzGBB5JaGah\\$yQ70j8BSXw==\\*@amtcAhHDhl8=\\*@a/8UkTuFFVU=](https://staging128.brassring.com/etStream/500/Presentation/Template/ASP/Candidate/Forms/AddForm.asp?isgq=@7jmvKabnpHc=&appnv=@Qa8WrdFDvAg=&localeid=@lsSbRwlc1jxKpUy0SbstnA==&mode=@a5PHOySW6Q=&where=@TPEBTmFaU8Z5hrqmRqSygA==&encryptedvalues=@M5dGwpKWk6xH08FIFSEjQ==*@QvtxAPFQo/d6Gkk1zovZds8lu8$zp5ZlN*@M9BYXm6FiuVlodQ0VZlTiQ==*@oDVR0Z7Pcbk=*@YQ8gaLyXBwscwhAG5ONuDA==*@a3RiUFszEso=*@7jmvKabnpHc=*@XPo1WBzaZuM=*@qzGBB5JaGah$yQ70j8BSXw==*@amtcAhHDhl8=*@a/8UkTuFFVU=)



## Section 13.3: Adding/Deleting Forms

To add a form:







1. Continuing on from Section 13.2: Accessing Forms, go to a view of candidates in a req output grid.
2. From the list of candidates within the req folder, click the Forms icon  for a particular Candidate.
3. Select the form needed from the drop-down menu.
4. Click the Add form button.
5. If applicable, complete any necessary fields on the form and click Save.
6. Click OK to close the confirmation message window

Most users will see this view when viewing forms:

Multiple forms list for: Poppins, Mary

PCV Applicant Assessment Form Add form eLink blank form


[Selection details](#)

Last action date	Form ID	Form name	Last edited by	Date added	Added by	Form approval	View form	Edit form	eLink form	Delete form
02-Feb-2012	560665	<a href="#">PCV Medical Form 1</a>	Integration, System	02-Feb-2012	Integration, System					
30-Jan-2012	560496	PCV RAM Form (For Administrative Use Only)	Manager, Automation	30-Jan-2012	Manager, Automation					
30-Jan-2012	560495	<a href="#">PCV Gateway Questionnaire</a>	Submission, System	30-Jan-2012	Submission, System					
30-Jan-2012	560494	Racial and Ethnic Data Form	Submission, System	30-Jan-2012	Submission, System					
30-Jan-2012	3996	<a href="#">Gateway questionnaire job response - Peace Corps - Evergreen Reg/98BR</a>	Submission, System	30-Jan-2012	Submission, System					

Close


Note that the PCV Medical Form (Now called Medical SORT Form) is added by integration with MAXx. DOVE users can view but not edit Med Form 1 (Medical SORT Form). Also, the highlighted GQ-Job Response is the preferable way to view a Candidate's application.













System Administrators see this view (below). They are the only users that can delete a form. To delete a form, select the trash can icon  in the **Delete Form** column.

Multiple forms list for: Jones, Mary Help

PCV Applicant Assessment Form Add form eLink blank form

 [Selection details](#)

Last action date	Form ID	Form name	Last edited by	Date added	Added by	Form approval	View form	Edit form	eLink form	Delete form
30-Nov-2011	550217	<a href="#">PCV RAM Form (For Administrative Use Only)</a>	Manager, Automation	30-Nov-2011	Manager, Automation					
30-Nov-2011	550214	<a href="#">PCV Gateway Questionnaire</a>	Zdemo, Training02	30-Nov-2011	Zdemo, Training02					
20-Sep-2011	542422	<a href="#">PCV Previous Peace Corps History Form</a>	Integration, System	20-Sep-2011	Integration, System					


Close



## Section 13.4: Sending a Blank Form

At times you may need to send a blank form to someone to complete, e.g. an Applicant Assessment form, Invitation Decision form or others. This can be done by using an eLink.


To send only a form to be completed:

1. Continuing on from Section 13.2: Accessing Forms, go to a view of candidates in a req output grid
2. From the list of candidates within the req folder, click the forms  icon for a particular Candidate.
3. Select the form from the drop-down menu.
4. Click eLink blank form
5. Select the address of the eLink as follows:
  - **To: (system users)** – Select the name from the list of available system users
  - **To: (non-system) users** – Type the complete email address in the field

 eLink blank PCV Applicant Assessment Form - 4078R : Forestry for Jones, Mary

\*From

To: (system users)   
Zdemo, Training02  
Zdemo, Training03  
Zdemo, Training04  
Zdemo, Training05

 [Selection details](#)

To: (non-system users)

*Separate multiple users by comma (,); this field may not contain spaces.*



5. Type a message to the recipient.

A screenshot of an email composition window. The "To: (non-system users)" field contains "trainingdove@gmail.com". Below it, a note says "Separate multiple users by comma (,); this field may not contain spaces." The "Include Req information" checkbox is unchecked. The "Subject" field contains "Form for Current Candidate". Below the subject, there is a checkbox labeled "Notify me when these forms have been submitted." which is also unchecked. The "Your message" text area contains "Please see attached form". At the bottom left, a legend indicates "\* = required field". At the bottom right, there are three buttons: "Send", "Clear", and "Cancel". The "Send" button is highlighted with a red box.

6. Click **Send**. A confirmation message displays.
7. Click **OK** to close the confirmation message.



## Section 13.5: Types of Forms in DOVE

The table below provides an overview of the forms that are currently used by Peace Corps, the definition of the form and when it is used and if the form is generated manually or automatically. An asterisk\* at the start of the form name indicates the form is generated automatically.

Form Name	Definition	Functional Role
<b>General Questionnaire – Job Response Form</b>	This is the main version of the application that DOVE users should refer back to when reviewing and placing candidates.	Recruitment and Placement receive once application is complete in DOVE.
<b>Racial and Ethnic Form</b>	This form is Part of the Volunteer Application	Candidate to Recruitment
<b>PCV Correspondence Form</b>	This form is used to capture any information that is not being captured in an existing form. For example, text from an e-mail or a phone call that needs to be part of an assessment. Keep in mind, no PHI or PII should be put in this form.	All DOVE Users
<b>Reference Forms</b> <ul style="list-style-type: none"> <li>*Peace Corps Reference Form</li> <li>Staff Reference Form</li> </ul>	<b>Peace Corps Reference Form:</b> Most common reference form sent to external references for PCV candidates.  <b>Staff Reference Form:</b> Reference Form for a Candidate from an internal Peace Corps Reference.	The first 3 Peace Corps Reference Forms are sent out automatically to the candidate, Recruitment manually sends out any additional Peace Corps Reference or Staff Reference Forms.
<b>Disposition Form</b>  <i>A disposition form is required when a Candidate's HR Status is updated to a final status (e.g. Candidate Withdrawn)</i>	Mandatory for candidates that are in a final status when updating HR Status. Form declares whether the disposition is for Candidate or Peace Corps reasons.	Recruitment or Placement (depends on where candidate is in the candidate process)
<b>Applicant Assessment Form</b>  <i>Completed when HR status is updated to References Received.</i>	This form is used to identify all assignment areas (AAs) a Candidate is qualified for, placement/location preferences, medical information, and languages. This form will continue to be completed as the candidate progress through the process. Some fields on this form are used to autofill other forms.	Recruitment and Placement





<b>Interview Assessment Form</b>  <i>Completed after HR status is updated to Interview Scheduled and candidate is interviewed.</i>  <i>If appropriate use the Couples Interview Assessment form.</i>	<p>This form is completed after an interview has been conducted. It provides details on the type of interview and responses to the interview questions found on the form.</p>	<p>Recruitment</p>
<b>*PCV Legal Form</b>  <i>Completed when the Candidate passes the assessment and HR Status is updated to Candidate Interviewed.</i>	<p>A reminder to complete this form is auto-generated once a Candidate has passed the interview assessment. Provides details on information such as marital status and other legal related fields. It also allows any necessary documentation to be tracked.</p>	<p>Recruitment and Legal</p>
<b>*PCV Medical SORT and Review Forms</b>  <i>Completed when HR Status is automatically updated from information sent from the Medical system to DOVE.</i>	<p>Medical forms are auto-generated based on the forms completed in the MAXx. Upon review, nomination status will be determined and Recruitment can update the Candidate's HR Status. Information from the Medical SORT Form will autofill the Applicant Assessment Form.</p>	<p>Medical</p>
<b>PCV Conditional Nomination Form</b>  <i>Completed if a candidate doesn't quite meet the language or skill qualifications for an assignment.</i>	<p>Provides details on why a conditional nomination should be issued. Recruitment will initiate the form and eLink to Placement for review and a decision.</p>	<p>Recruitment and Placement</p>
<b>PCV Invitation Decision Form</b>  <i>Sent as an e-link in an Invitation email communication, when completed, the HR status is updated to Invited.</i>	<p>This form is completed by a candidate if they accept the invitation.</p>	<p>Placement</p>



## Chapter 14: eLinks in DOVE

eLinks are email messages sent from DOVE containing an embedded hyperlink to a req, resume/CV, Talent Record, communication or form. eLinks allow DOVE users to communicate candidate or req information in an easy and integrated way. eLinks also enable individuals that are non-system users to receive information on a candidate or req.

This chapter will focus on:

- Sending an eLink
- Viewing an eLink
- Responding to an eLink




Remember – “Think before you eLink.” Do not send any sensitive information (i.e. personal identifiable information, protected health information, etc) via eLink.

### Section 14.1: Sending eLinks












At times it may be necessary to send reqs, communications or forms to DOVE and non-system users. Note that eLinks only provide non-system users access to that particular form (not the entire record).

eLinks are denoted by this  icon .

#### To send an eLink for blank Forms:

1. From the applicable req folder, select the candidate from the list displayed.
2. Click the Forms  icon.
3. The Form list is displayed. Use the drop-down list to make the selection, e.g. PCV Applicant Assessment Form.

Multiple forms list for: Jones, Mary Help

Last action date	Form ID	Form name	Last edited by	View form	Edit form	eLink form	Delete form
03-Feb-2012	560697	<a href="#">PCV Medical Form 2</a>	Integration, Sy				
03-Feb-2012	560272	<a href="#">PCV Medical Form 1</a>	Integration, Sy				
13-Jan-2012	560204	PCR Interview Assessment Form-443BR:Motion Picture Director	Griffin, Eric				
13-Jan-2012	560203	<a href="#">Job response - Peace Corps Response/443BR</a>	Submission, Sy				
13-Jan-2012	560202	Talent-Gateway-Peace Corps Response	Submission, Sy				
13-Jan-2012	560201	PCR Gateway Questionnaire	Submission, System	13-Jan-2012	Submission, System		
13-Jan-2012	560200	Racial and Ethnic Data Form	Submission, System	13-Jan-2012	Submission, System		
13-Jan-2012	3963	<a href="#">Gateway questionnaire job response - Peace Corps Response/443BR</a>	Submission, System	13-Jan-2012	Submission, System		

PCV Applicant Assessment Form

PCV Applicant Assessment Form

PCV Conditional Nomination Form

PCV Correspondence Form

PCV Disposition Form

PCV Gateway Questionnaire

PCV Int Assess Couples Form

PCV Int Assessment Form

PCV Invitation Decision Form

PCV Legal Form

PCV Legal Form Reminder

PCV Lifecycle Management Form

PCV Medical Form 2

PCV Medical Form 3

PCV Staff Reference Form

PCV Trainee/Volunteer Registration Form

Peace Corps Reference Form

Add form

eLink blank form



The Form list can also be accessed by clicking on the form icon in a req output grid.

Last action date	Form ID	Form name	Last edited by	Date added	Added by	Form approval	View form	Edit form	eLink form	Delete form
------------------	---------	-----------	----------------	------------	----------	---------------	-----------	-----------	------------	-------------

The forms list can be accessed for a specific Candidate from the Talent Record Scrolling Ribbon and it gives the user a slightly different view. It also shows what Forms the Candidate already has completed. This is also where you can eLink a completed form to a system or non-system user. To eLink a Candidate's Talent Record, go to the Actions button on the Talent Record.

4. Click **eLink blank form**.
5. The eLink blank form page is displayed. The sender can then complete any pertinent information.
  - **To a system user:** use the menu provided to highlight and select the system user.
  - **For non-system users:** (e.g. candidates) enter the email address of the recipient.

\*From: trainingdove@peacecorps.gov

To: (system users) Zdemo, Training06  
Zdemo, Training07  
Zdemo, Training08  
Zdemo, Training09  
Zdemo, Training10

To: (non-system users) trainingdove@gmail.com

Separate multiple users by comma (,); this field may not contain spaces.

Include Req information ☐

Subject: Review

☒ Notify me when these forms have been submitted.

Your message: Please complete attached.

\* = required field

Send Clear Cancel

6. You may elect to be notified via email when the form has been completed. This checkbox defaults unselected, users must select this checkbox to receive notification.



7. Click **Send**.

The eLink will be sent to the selected system user and/or non-system user with a hyperlink embedded for them to take the required action. Confirmation messages will be sent to the sender that an eLink has been submitted, if they have selected to be notified.



## To eLink Completed Forms:

1. To eLink a complete form, go to the Forms list and select the eLink icon.

PCV Applicant Assessment Form

[Selection details](#)

Last action date	Form ID	Form name	Last edited by	Date added	Added by	Form approval	View form	Edit form	eLink form	Delete form
07-Feb-2012	560878	PCV RAM Form (For Administrative Use Only)	Manager, Automation	07-Feb-2012	Manager, Automation					
07-Feb-2012	560876	<a href="#">PCV Gateway Questionnaire</a>	Submission, System	07-Feb-2012	Submission, System					
07-Feb-2012	560875	Racial and Ethnic Data Form	Submission, System	07-Feb-2012	Submission, System					
07-Feb-2012	4013	<a href="#">Gateway questionnaire job response - Peace Corps - Evergreen Req/98BR</a>	Submission, System	07-Feb-2012	Submission, System					

2. The window will pop up. Fill in the sender information and a short message.

eLink Gateway Job Response-Peace Corps - Evergreen Req/98BR for Jones, Mary

eLink form to View

\*From

To: (system users)   
Alberta, Dana  
API, Web  
AssocDirSS, QA  
AssocDirSS, Test  
 [Selection details](#)

To: (non-system users)

Separate multiple users by comma (,); this field may not contain spaces.

Subject

☐ Notify me when these forms have been submitted.

Your message

\* = required field

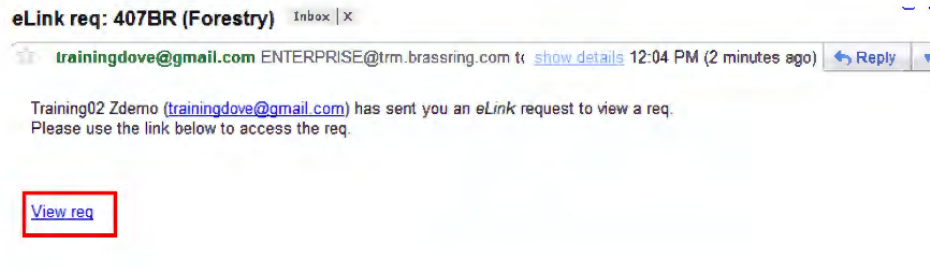
3. Press send and a completed form will be eLinked for review.



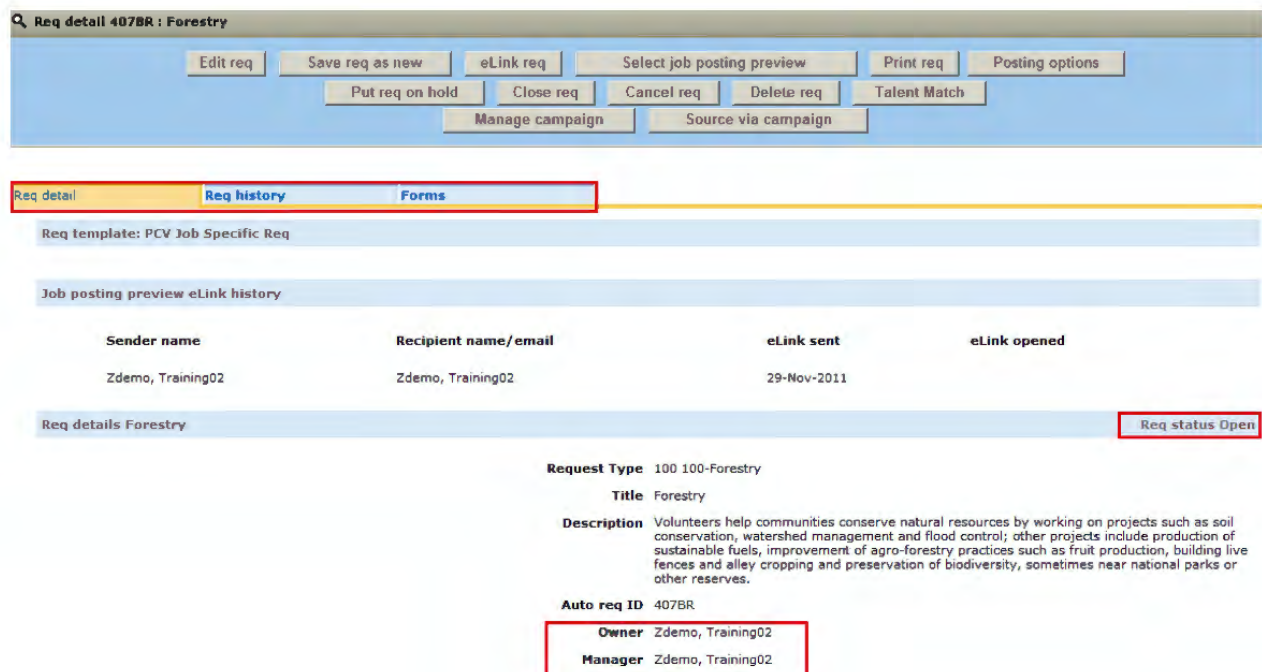
## Section 14.2: Viewing/Editing eLinks

To view an eLink:

1. Access your email and **click the hyperlink** located in the body of the email. *The below example shows a req that has been sent for review.*



2. A new page will display. The page launched may be a form, req, or other communication to review and complete. *The below example shows that users will be able to review the req detail, req owner and manager, req history, and current status of the req.*







1. Click the Candidate's name (John Doe) or cut and paste the link to your browser.

2. Next, click on the link and the form will display like below.

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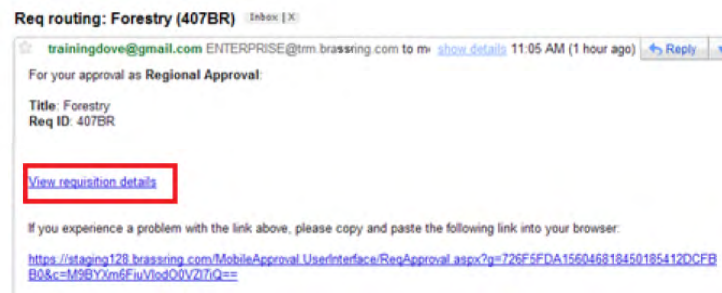


### Section 14.3: Responding to eLinks

eLinks are sent to system and non-system users to review or respond to a form, req, or communication. eLinks are also useful for messaging the Req Team and approvers, notifying them when a req has been approved and opened, and when a form needs to be completed.

To respond to an eLink via the email you receive:

1. Click the **hyperlink** within the message body of the eLink (e.g. [View requisition details.](#)) .



2. A new page will display.
3. Complete the requested information (e.g. Req Approval Form).

3. Once the form is completed, the Req Team will be notified and the form will display in req history.

### Test Your Knowledge

Answer the following questions “True or False”?

1. An eLink is sent to system users, notifying them of companywide events.
2. eLinks will be sent to persons that will ask them to review and approve or decline requisitions.
3. To respond to an eLink, you will click the attachment button.



## Section 14.3: eLinking a Talent Record

Candidate Talent Records can be eLinked to system users or non-system users.

To eLink a Talent Record

1. Open up the Talent Record for the desired Candidate
2. Under the Actions Button click send eLink

Talent Record: Appleseed, Jerome

44686: Crop Extension

230 Hacker ST  
Philly, Pennsylvania 29098  
565-987-0984  
jerome@L.com

Candidate type: Active  
HR Status: Nomination Cleared  
HR status date: 23-Jan-2012  
HR status updated by: Hofowitz, Robyn

Notes: Add View  
Forms: Add View  
Communications: Send View  
Attachments: Add View

Viewed (this req): N/A  
Last viewed (global): 20-Jan-2012; 29188  
Last viewed (global) by: Doe10, John  
Original date loaded: 04-Nov-2011

Employer: N/A  
Position held:

Contact Details | Resume/CV | Cover Letter | Experience/Education

Language: English (US)  
Jerome Appleseed  
230 Market ST  
Philly, Pennsylvania 29098  
United States  
jerome@L.com  
Home Phone: 565-987-0984

Submission History | Action Log

Action	Date	Action by	Details	Name/Type	From	To	Folder
HR Status - Updated	23-Jan-2012	Hofowitz, Robyn		Current Status	Candidate Interviewed	Nomination Cleared	44686: Crop Extension
HR Status - Updated	19-Jan-2012	Hofowitz, Robyn		Current Status	Candidate Interviewed	Candidate Interviewed	44686: Crop Extension



### 3. Complete the appropriate fields and click send

Peace Corps

From:

To: (system users)

To: (non-system users)

Separate multiple users by comma (,); this field may not contain spaces.

Include HR status ☐

Forms to view

Jerome Acknowledged	Delayed Questionnaire, job response - Peace Corps - Evergreen Reg 9884	24-NOV-2011	54821
Jerome Acknowledged	PCV Delayed Questionnaire	24-NOV-2011	548211
Jerome Acknowledged	PCV RAA Form (For Administrative Use Only)	24-NOV-2011	548213
Jerome Acknowledged	Racial and Ethnic Data Form	24-NOV-2011	548210

Forms to complete

Complete Reference Carded Information
Correspondence Form
Country Director Reference
Clipboard Form
Delayed Questionnaire

Notify me when these forms have been submitted. ☐

Include Reg information ☐

Subject:

Your message:

### eLinking a Talent Record to STRATs

STRATs are strategic part-time Peace Corps recruiters based at colleges and universities around the country. They are employed by the school and not be Peace Corps and therefore do not have access to DOVE. Each STRAT works with a STRAT Manager (usually a recruiter) who manages what files and candidates the STRAT will be processing.

1. The STRAT Manager will eLink the following forms to the STRAT for review and completion:
  - a. GQ-Job Responses
  - b. Applicant Assessment Form
  - c. Interview Assessment Form
  - d. Couple's Interview Assessment Form (if applicable)
  - e. Correspondence Form
  - f. Any necessary attachments
2. You can only eLink information for one Candidate at a time.



## Chapter 15: Advanced Set-up of the DOVE Dashboard (Working with Panels)

This chapter focuses on advanced DOVE Dashboard set-up. In Chapter 3, you learned about how to use the panels to configure your DOVE Dashboard for your user type's system defaults. This chapter will refresh those basic set-up options and instruct you on how to leverage additional features.

These features include:


- Re-positioning panels;
- Adding/Removing Quicklinks;
- Using Filters; and
- Working with Display Options

These additional features allow DOVE users to more efficiently track information in the system. Note that these features involve organizing the panels or information not taking action on a candidate or req. Changes to HR Status or req should be done in the req output grid at this time.

### Section 15.1: Basic Set-up Options – How to Working with Panels


Panels can also be added, removed, minimized, maximized and resized.

**To add or remove panels:**


1. Click the +/- icon. 
2. A sub-menu displays, allowing you to select **Add Panel** or **Remove Panel**. A black arrow indicates a sub-menu is available.

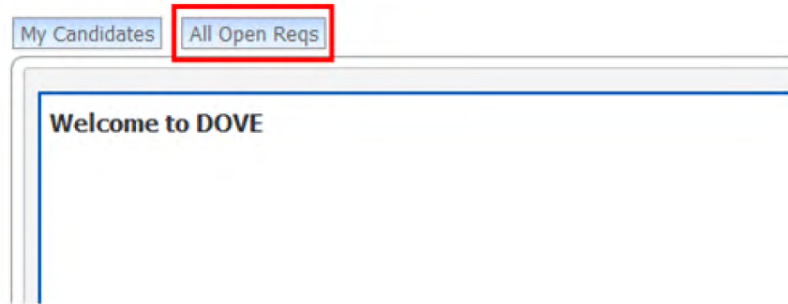


A sub-menu is displayed with three options: **Add Panel**, **Remove Panel**, and **Restore Defaults**. A black arrow points to the left of the first two options, indicating they have sub-menus.

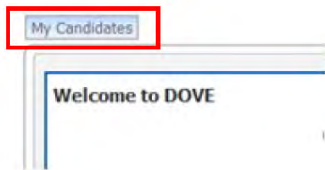
3. Once a panel is open, you can remove a panel by clicking the Close icon. 
4. A confirmation message displays asking if you wish to close the panel, Click Ok. The panel is now closed. A link displays at the top left of the Welcome page. To add the panel, click the link.

**To Minimize:**


1. In the panel > click the Minimize icon. 
2. The panel is minimized and will appear as a tab-link at in the top left of the DOVE Dashboard (see graphic on the next page).

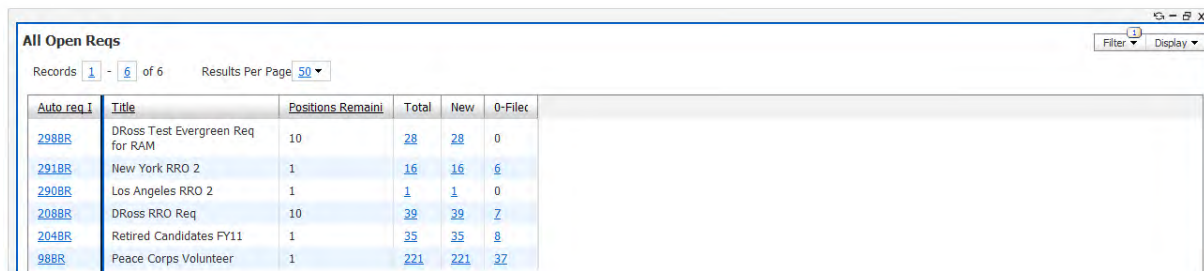


3. To restore the panel, click the link and it will open back up in the dashboard.



### To Maximize:

1. In the panel > click the Maximize icon. 
2. The panel will maximize and display in full page mode directly on the Welcome page. All other panels will be covered by the maximized panel.



Auto req I	Title	Positions Remaini	Total	New	0-Filec
<a href="#">298BR</a>	DRoss Test Evergreen Req for RAM	10	<a href="#">28</a>	<a href="#">28</a>	0
<a href="#">291BR</a>	New York RRO 2	1	<a href="#">16</a>	<a href="#">16</a>	<a href="#">6</a>
<a href="#">290BR</a>	Los Angeles RRO 2	1	<a href="#">1</a>	<a href="#">1</a>	0
<a href="#">208BR</a>	DRoss RRO Req	10	<a href="#">39</a>	<a href="#">39</a>	<a href="#">2</a>
<a href="#">204BR</a>	Retired Candidates FY11	1	<a href="#">35</a>	<a href="#">35</a>	<a href="#">8</a>
<a href="#">98BR</a>	Peace Corps Volunteer	1	<a href="#">221</a>	<a href="#">221</a>	<a href="#">37</a>

3. Click the minimize icon to restore the panel size on the page.



## Section 15.2: Additional Options

Panels can be configured, adjusted in size and re-positioned to fit your working style.

### To re-position panels:

1. **Hover** the mouse over the boarder of the panel to be moved. With the four point cursor displayed, drag and drop the panel to the new location. The page refreshes and the panel will snap into place on the DOVE Dashboard.

### QuickLinks:

Quick Links are used to add websites or network links that are frequently visited. To use Quick Links you must add the Quick Links Panel to your DOVE Dashboard.

To add Quick Links:

1. In the Quick Links panels, **click** the Add > Add Link > Uncategorized (you must first create another folder to choose a destination besides Uncatagorized).
2. In the Name and URL field **enter** a name for the website and the URL.

Quick Links

Add

\* Name \* URL

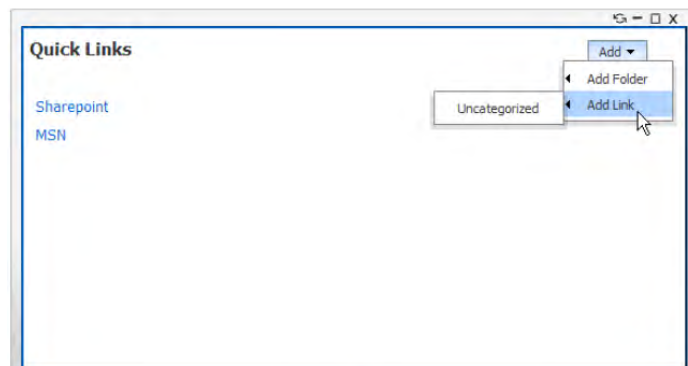
Peace Corps Home Page tp://www.peacecorps.gov/ Test Save

Cancel

Sharepoint

MSN

3. **Click** Test to preview the website and ensure the correct page displays.
4. **Click** Save to save the Quick Link.

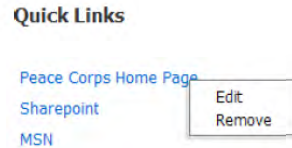






## Editing/Removing Quick Links:

To edit or remove a Quick Link, **right click** on the link in the panel and click Edit or Remove from the pop-up.



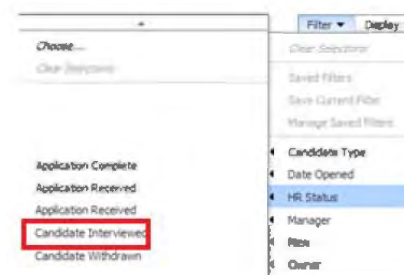
## Using Filters


### Filter/Display

Content within certain panels can be managed by using the Filter/Display buttons. The Filter menu allows you to apply preset filters, while the Display option allows you to manage the columns of information within a panel.

### Filter Options:

1. **Click** Filter > select the filter type from the drop-down list > select the appropriate option. More than one option can be selected and choices are notated by a checkmark.

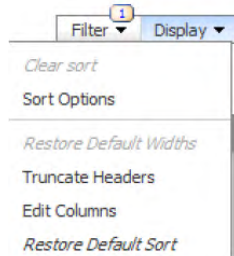


2. The panel refreshes and the new filter displays. When filters have been applied a number appears above the filter button. 
3. To remove filters: **Click** Filter > the filter type from the drop-down > click Clear Selections.



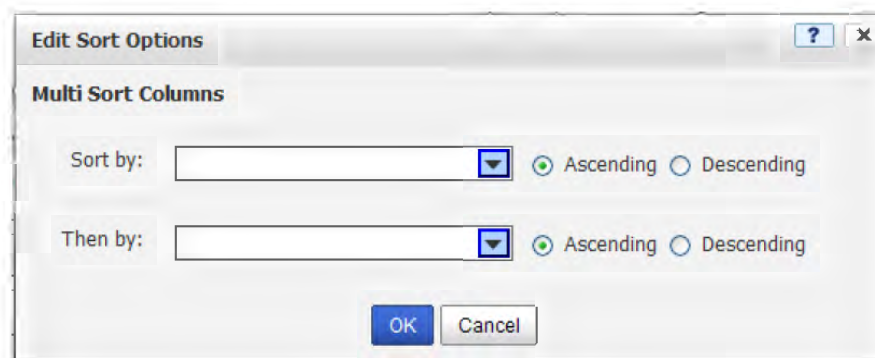
## Working with Display:

**Click Display** > select the option in the drop-down menu. Complete the on-page information based on the selection made.



## Display Options

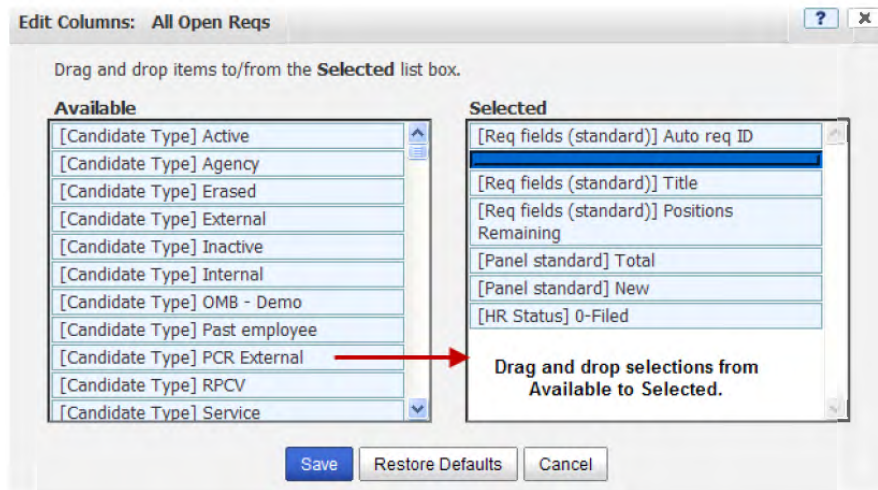
**Sort Options** – Sorts the column information based on a two level sort of Ascending or Descending order, along with where columns will display in the panel.



**Truncate Headers** – When you select the Truncate Headers option, the system resizes the width of the column headers, making them smaller. To return the column headers to their original size, click Restore Default Widths.



**Edit Columns** – Is used to customize the columns of information that appear in the panel. The Edit Columns box displays when this selection is made. To select a column for the panel, drag and drop an item from the Available list to the Selected list. Click Save. The new column appears in the panel.



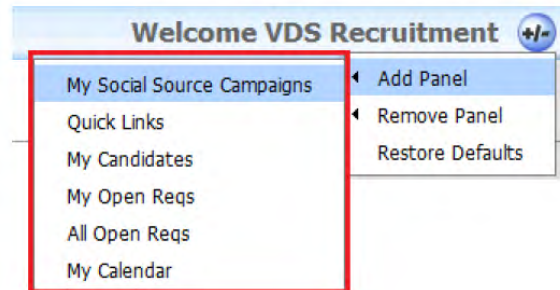
**Restore Defaults** – Restores the default system sort.



## Section 15.3: Taking Actions from the Panel

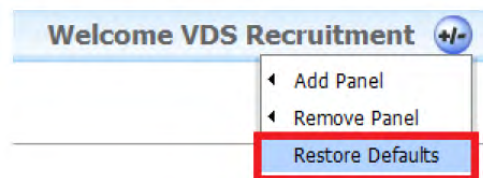
The panels in DOVE also allow you to take actions from the Welcome page. The panels you can display and the user defaults depend upon your user type in DOVE. User type also indicates which actions you can take on reqs and candidates in the panels.

For example, for VDS Recruitment user, users can display the following panels.

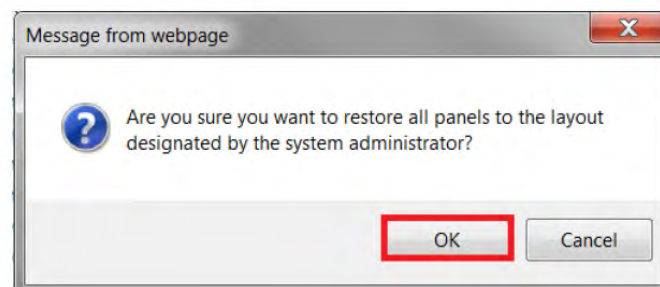


It is recommended that users set and work in their default panels to first learn the functions of the panels.

To restore defaults at any time, go to the plus/minus button and select **Restore Defaults**.



You will be prompted with a system administrator message. Select “OK” to restore the defaults.





Once defaults are restored, users should get to a screen that looks something like this:

The screenshot displays four panels from the DOVE 1.0 system interface:

- Welcome to the DOVE system!**: A panel with a message: "Please remember to work with your Wing Leader if you have any questions. They will escalate any issues you have to the appropriate contact."
- Kinetic2X BrassRing Social Source**: A panel with a "CURRENTLY RUNNING CAMPAIGNS" section showing "No Campaigns Created".
- My Candidates**: A table showing candidate status and activity dates.
 

Status	Total	New	Last Activity Date
0-Filed	29	21	09-Nov-2011
Invitation Accepted PCR	1	1	06-Dec-2011
Application Complete	2	2	12-Dec-2011
RC Reviewed	3	3	27-Nov-2011
Reference Sent	2	2	16-Jan-2012
Interview Scheduled	1	0	06-Dec-2011
Candidate Interviewed	4	1	27-Jan-2012
Nomination Cleared	5	2	06-Jan-2012
Nomination Validation Required	1	1	07-Nov-2011
Legally Cleared	2	0	11-Nov-2011
Invitation Accepted	1	1	22-Dec-2011
Final Medical Clearance	1	0	14-Dec-2011
- My Open Reqs**: A table showing open requests with columns: Auto n, Title, Total, New, Application, RC Review, References, and Candidate I.
 

Auto n	Title	Total	New	Application	RC Review	References	Candidate I
43288	Sample Recruiter Req	0	0	0	0	0	0
43188	Sample RKO Req	0	0	0	0	0	0
43088	Sample MI Req	0	0	0	0	0	0
42988	Sample Evergreen Req	0	0	0	0	0	0
42888	Sample MC Req	0	0	0	0	0	0
42788	Sample JSR -	1	0	0	0	0	1

- The **DOVE Welcome** panel will have system messages from the Wing Leader, System Administrator, or other stakeholder regarding current efforts.
- The **Social Source** panel will be visible for Recruitment users only. This panel, if selected, takes you directly to the lead management Social Source web-application
- The **My Candidates** panel will also be visible for Recruitment and Placement candidates. This helps you view which candidates are in certain HR Statuses.
- The **My Open Reqs** panel is visible for most other user types. It allows a user to track how many reqs they are assigned to or part of a req team.
- The **My Calendar** panel is visible as a default for most other user types. It allows your MSOutlook calendar to automatically sync with DOVE.
- The **All Open Reqs** panel shows all reqs that currently are open.

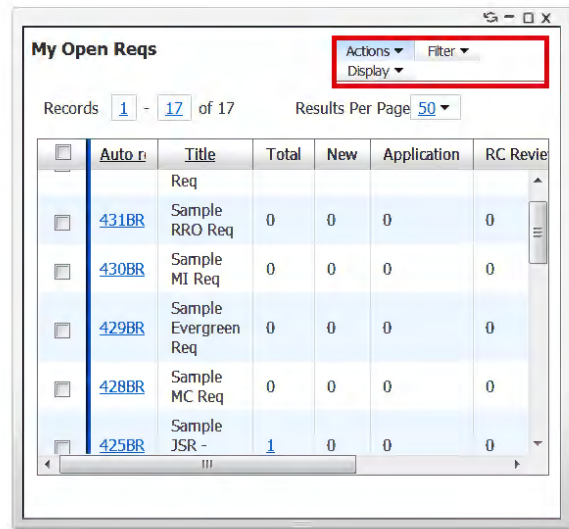
Depending on how you edit the headers of the table, more or less information about these panels will be revealed. Each panel allows you to monitor a part of DOVE with respect to candidates or reqs. The actions one can take in a panel depends on user type privileges.

The most common panels to take actions from are the **My Open Reqs** and **My Candidates**.

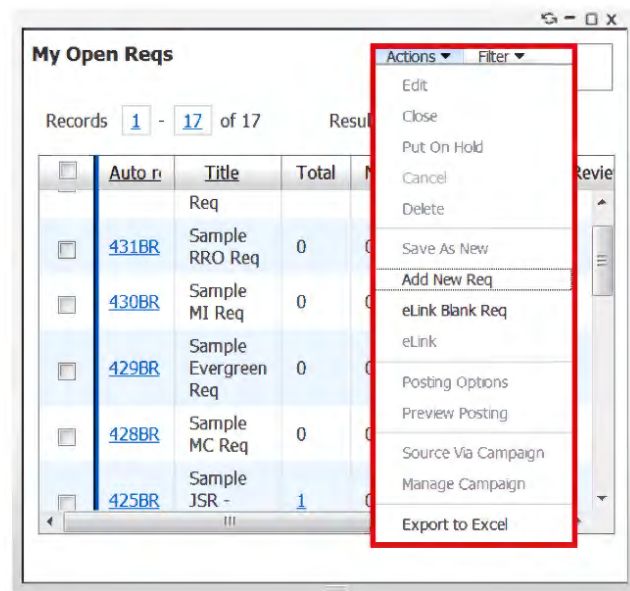


## My Open Reqs

The **My Open Reqs** Panel contains the filter and display options discussed above. Additionally, it includes the Actions button. This button's options vary based on user type.



For example for Recruitment users, they can Add New Req, eLink Blank Req, and Export to Excel.



See how the Posting Options and Preview Posting options are disabled. These options are only available to system administrators. Other options may be disabled due to user privileges.

To take an action, select the option and another window will open, then proceed as you would normally work in DOVE.





Users can also click on a req hyperlink. These are in the column titled Auto Req ID.

The screenshot shows a window titled "All Open Reqs". It has a table with two columns: "Auto req ID" and "Title". The "Auto req ID" column contains hyperlinks for each request. A red box highlights this column. The "Title" column contains the names of the requests.

Auto req ID	Title
<a href="#">446BR</a>	Crop Extension
<a href="#">432BR</a>	Sample Recruiter Req
<a href="#">431BR</a>	Sample RRO Req
<a href="#">430BR</a>	Sample MI Req
<a href="#">429BR</a>	Sample Evergreen Req
<a href="#">428BR</a>	Sample MC Req
<a href="#">425BR</a>	Sample JSR - Forestry
<a href="#">423BR</a>	Training Medical Pending
<a href="#">420BR</a>	Sample Med. Pending Req
<a href="#">417BR</a>	Sample Ret. Candidate Req
<a href="#">413BR</a>	MI Q4 13 Education

Clicking on the **Auto Req ID** hyperlink will take you to the **Req Detail** screen. This enables users to view the req details page and take actions on the “req” level.

The screenshot shows the "Req detail 446BR : Crop Extension" screen. It has a top navigation bar with buttons: "Save req as new", "eLink req", "Select job posting preview", "Print req", "Posting options", "Talent Match", "Manage campaign", and "Source via campaign". Below this is a tabbed interface with "Req detail", "Req history", and "Forms". The "Req detail" tab is active, showing fields for "Req template: PCV Job Specific Req", "Job posting preview eLink history", and "Req details Crop Extension". The "Req status" is "Open". The "Request Type" is "110 110-Crop Extension". The "Title" is "Crop Extension". The "Description" is "Volunteers encourage sustainable-crop production through promotion of organic-farming techniques and better farm management. Among their activities are conducting workshops on integrated pest management, introducing composting, green manures, and other soil improvement techniques, testing new varieties of seeds and demonstrating post-harvest management methods, and teaching agriculture and extension methodologies in formal training institutions."





From **My Open Reqs**, you can also click on the hyperlinked numbers. These numbers indicate the Total in that req.

The screenshot shows a window titled "All Open Reqs". At the top right are dropdown menus for "Actions", "Filter", and "Display". Below these is a pagination bar with links: "<< First", "< Prev", "1", "2", "3", "4", "Next >", and ">> Last". To the right of the pagination bar is "Records 1". Below the pagination bar is a table with three columns: "ID", "Title", and "Total". The table has one row with the title "Crop Extension" and a "Total" of "1". The number "1" in the "Total" column is highlighted with a red box.

ID	Title	Total
	Crop Extension	<a href="#">1</a>

Clicking on the hyperlinked a Candidates in Req panel in the dashboard.

The screenshot shows a window titled "Candidates in: 446BR : Crop Extension". At the top right are dropdown menus for "Actions", "Filter", and "Display". Below these is a pagination bar with "Records 1 - 1 of 1", "Selected 0", and "Results Per Page 50". Below the pagination bar is a table with columns: "Name", "Viewed", "Date La", "Notes", "Forms", and "Candidate". The table has one row with the name "Appleseed, Jerome", a "Viewed" status of "0", a "Date La" of "20-Jan -2012", a "+" icon in the "Notes" column, a document icon in the "Forms" column, and a blue hyperlink "Active" in the "Candidate" column. The entire row is highlighted with a red box.

Name	Viewed	Date La	Notes	Forms	Candidate
<a href="#">Appleseed, Jerome</a>	0	20-Jan -2012	+		<a href="#">Active</a>

From this panel, you can view key information about that Candidate in the req. In this case, you can see Mr. Appleseed is an active candidate and he was last viewed on January 20, 2012. Clicking on the “active” hyperlink shows information on when the candidate was last updated.



Clicking on the candidates name hyperlink will take you to their Talent Record. From the Talent Record, you can take actions as you normally would in that section of DOVE.

**Talent Record: Appleseed, Jerome** Actions ▾

**446BR: Crop Extension**

[230 Market ST](#)  
[Philly, Pennsylvania 29098](#)  
[565-987-0984](#)  
[jerome@t.con](#)

**Candidate type:** [Active](#)  
**HR Status:** [Nomination Cleared](#)  
**HR status date:** 23-Jan-2012  
**HR status updated by:** Mofsowitz, Robyn

**Notes:** [Add/View](#)  
**Forms:** [Add/View](#)  
**Communications:** [Send/View](#)  
**Attachments:** [Add/View](#)

[Contact Details](#) [Resume/CV](#) **[Experience/Education](#)**

**Experience** Print Edit

Employer	Position Held	Start Year	End Year	Most Recent
No Records Found.				

**Education**

[Submission History](#) **[Action Log](#)** Print Search Filter ▾

Action	Date ▾	Action by	Details	Name/Type	From	To	Folder
--------	--------	-----------	---------	-----------	------	----	--------

In the **Candidates in Req** panel, you can then filter by Candidate Type or HR Status and edit columns in the Display function..

**Candidates in: 446BR : Crop Extension** Actions ▾ Filter ▾ Display ▾

Records [1](#) - [1](#) of 1 Selected [0](#) Results Per Page [50](#) Clear Selections

	Name ▴	Viewed	Date La	Notes	Forms	Candidate	HR Status	Communications	All assignment areas the applicant is	HR st	
<input type="checkbox"/>	<a href="#">Appleseed, Jerome</a>		30-Jan-2012			<a href="#">Active</a>	Nomination Cleared			23-JAN-2012	Philly

Candidate Type

HR Status

Editing columns in this panel allows you to add candidate information fields to this view.



In **My Open Reqs**, users can filter and edit display options also. In filters, users can filter by Candidate Type, Date Opened, HR Status, Manager, New and Owner. Users can edit headers to add candidate type, req field, and HR Status information.

The screenshot shows the 'My Open Reqs' window. It includes a table with columns: **Auto r**, **Title**, **Total**, **New**, and **A**. The table lists several requests with IDs like 432BR, 431BR, 430BR, 429BR, 428BR, and 425BR. A filter dropdown menu is open, showing options: **Candidate Type**, **Date Opened**, **HR Status**, **Manager**, **New**, and **Owner**. The 'Candidate Type' option is highlighted with a red box.

Auto r	Title	Total	New	A
432BR	Sample Recruiter Req	0	0	0
431BR	Sample RRO Req	0	0	0
430BR	Sample MI Req	0	0	0
429BR	Sample Evergreen Req	0	0	0
428BR	Sample MC Req	0	0	0
425BR	Sample JSR - Forestry	1	0	0

## My Candidates

The **My Candidates** panel works similarly to the My Open Reqs in that this panel contains only those candidates that are assigned to that user. This panel offers display options and columns showing HR Status information as the default setting.

The screenshot shows the 'My Candidates' window. It features a table with columns: **Status**, **Total**, **New**, and **Last Activity Date**. The table lists various candidate statuses such as '0-Filed', 'Invitation Accepted PCR', 'Application Complete', etc. A 'Display' dropdown menu is visible in the top right corner, highlighted with a red box.

Status	Total	New	Last Activity Date
0-Filed	29	21	09-Nov-2011
Invitation Accepted PCR	1	1	06-Dec-2011
Application Complete	2	5	12-Dec-2011
RC Reviewed	3	3	27-Nov-2011
References Sent	2	2	18-Jan-2012
Interview Scheduled	1	0	06-Dec-2011
Candidate Interviewed	4	1	27-Jan-2012
Nomination Cleared	5	1	06-Jan-2012
Nomination Validation Required	1	1	07-Nov-2011
Legally Cleared	2	0	11-Nov-2011
Invitation Accepted	1	1	22-Dec-2011
Final Medical Clearance	1	0	14-Dec-2011



In the example below, the user has a total of 7 candidates that are at the HR Status of Application Complete. Clicking the hyperlink takes you to those candidates.

**My Candidates** Display ▼

Status	Total	New	Last Activity Date
0-Filed	<a href="#">29</a>	<a href="#">21</a>	09-Nov-2011
Invitation Accepted PCR	<a href="#">1</a>	<a href="#">1</a>	06-Dec-2011
Application Complete	<a href="#">7</a>	<a href="#">5</a>	12-Dec-2011
RC Reviewed	<a href="#">3</a>	<a href="#">3</a>	27-Nov-2011
References Sent	<a href="#">2</a>	<a href="#">2</a>	18-Jan-2012
Interview Scheduled	<a href="#">1</a>	0	06-Dec-2011
Candidate Interviewed	<a href="#">4</a>	<a href="#">1</a>	27-Jan-2012
Nomination Cleared	<a href="#">5</a>	<a href="#">1</a>	06-Jan-2012
Nomination Validation Required	<a href="#">1</a>	<a href="#">1</a>	07-Nov-2011
Legally Cleared	<a href="#">2</a>	0	11-Nov-2011
Invitation Accepted	<a href="#">1</a>	<a href="#">1</a>	22-Dec-2011
Final Medical Clearance	<a href="#">1</a>	0	14-Dec-2011

This user also has 5 new candidates in Application Complete.

**My Candidates** Display ▼

Status	Total	New	Last Activity Date
0-Filed	<a href="#">29</a>	<a href="#">21</a>	09-Nov-2011
Invitation Accepted PCR	<a href="#">1</a>	<a href="#">1</a>	06-Dec-2011
Application Complete	<a href="#">7</a>	<a href="#">5</a>	12-Dec-2011

The hyperlink candidates are displayed in a new panel – Candidates in: Application Complete.

**Candidates in: Application Complete** Actions ▼ Filter ▼ Display ▼

Records [1](#) - [3](#) of 3      Selected [0](#)      Results Per Page [50](#)

<input type="checkbox"/>	Name ▲	Viewed	Date La	Notes	Forms	Candidate	HR Status
<input type="checkbox"/>	<a href="#">Appleseed, Johnny</a>					<a href="#">Active</a>	▼ Application Complete



It is recommended to view and track candidate's HR Status in the My Candidates panels, but not update HR Status from this panel.





## To update HR Status from the panels:

1. Select from **My Open Reqs** an auto req ID hyperlink and open a “Candidates in Req” panel.

Candidates in: 209BR :

Records 1 - 30 of 30 Selected 0 Results Per Page 50

	Name	Viewed	Date La	Notes	Forms	Candidate	HR Status
<input type="checkbox"/>	Appleseed, Jerome		13-Dec-2011	+		Active	Nominati Cleared

2. Next, click on the ▼ in the HR Status column and other HR Status options will appear.

Candidates in: 209BR :

Records 1 - 30 of 30 Selected 0 Results Per Page 50

	Name	Candidate	HR Status	HR sta	Communications	All assignmen areas the applicant
<input type="checkbox"/>	Appleseed, Jerome	Active	▼			

- Nomination Cleared
- Legally Cleared
- No Interest Reassigned
- No Interest PO Reviewed
- Medically Not Cleared
- No Interest Legal Reviewed
- Candidate Withdrawn

Advanced Options...  
View History...

3. Select the next HR Status for the Candidate. And, Click Save.



Candidates in: 209BR :

Records 1 - 30 of 30 Selected 0 Results Per Page 50

<input type="checkbox"/>	Name ▲	Date La	Notes	Forms	Candidate	HR Status	HR st
<input type="checkbox"/>	<a href="#">Appleseed, Jerome</a>	16-Feb-2012	+		Active	Legally Cleared	

Save Cancel

4. Saving the change automatically updates the status in the panel. If the candidate is in multiple reqs, it can take up to 10 minutes for the change to be reflected across all reqs.

Candidates in: 209BR :

Records 1 - 30 of 30 Selected 0 Results Per Page 50

<input type="checkbox"/>	Name ▲	Date La	Notes	Forms	Candidate	HR Status	HR st
<input type="checkbox"/>	<a href="#">Appleseed, Jerome</a>	16-Feb-2012	+		Active	▼ Legally Cleared	16 Feb 2012



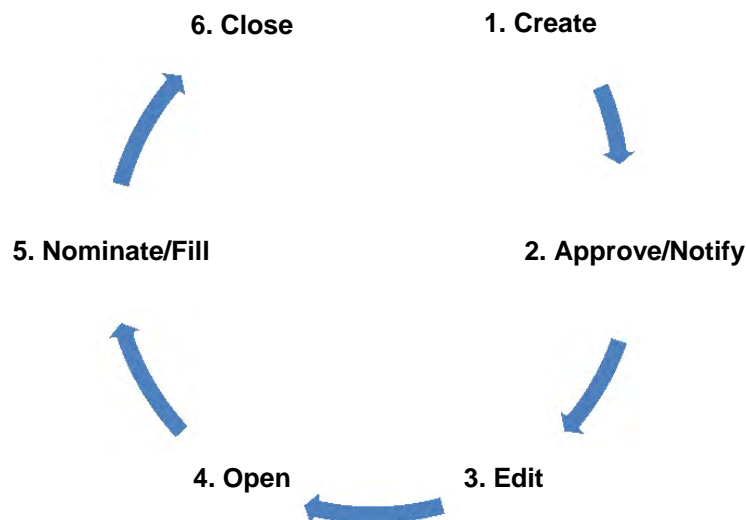
## Chapter 16: Legal Pending Req

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Candidates are copied into the Legal Pending Req (“PCV Legal Pending Req” in the system) from the beginning of their processing; however, they will not be visible in the req until they are at HR Status – Nomination Cleared. When the legal office clears a Candidate in the legal pending req they update the HR Status to Legally Cleared. This HR Status is reflected in the JSR. Placement needs to be aware of candidates that successfully move to HR Status - Legally Cleared, which indicates that they can be invited to become a Peace Corps Volunteer. The following provides an overview for Legal Pending Req. The legal office will create this req. For more information, see Appendix B, Additional Processes, Legal Process.

### Section 16.1: Legal Pending Req Lifecycle

Legal Pending Req is created and opened without an approval process. The owner of this req is the legal office.



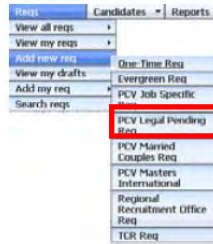
1. **Create** - A req is first created with the req form. The req creator opens and begins to fill in the correct form.
2. **Approve/Notify** - The Legal Pending Req requires no approval routing, it is approved by completing the req form. The owner, manager, and notify upon approval fields in the req form will ensure that once the req is open the appropriate users are notified.
3. **Edit** - The req creator will fill in the rest of the req form.
4. **Open** - Once approved and revised, the req is ready to be opened. Opening the req allows users to start viewing and working with the req
5. **Nominate/Fill** – There is no specific nomination/fill step for Legal Pending Req. This req serves as a holding pool req to organize candidates as they are legally processed. All candidates enter this req.
6. **Close** - Finally, once the req has no more active candidates inside it, the req can potentially be closed. There is no renewal needed because it is never posted. This req always has candidates being processed within the req.



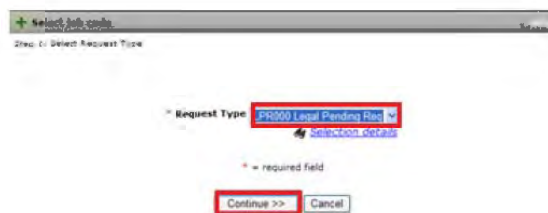


## Section 16.2: Legal Pending Req Form

1. Navigate to the **Reqs tab** > Add new req > **PCV Legal Pending Req.**



2. The Select Request type page is displayed. Use the drop-down arrow in the Request Type box and select **LPR000 Legal Pending Req.**



3. Click **Continue >>**. The Add a new req page displays. On the req form, you must enter information for all required fields, which are noted with a red asterisk. It is best practice to complete the form from top to bottom, as the selection for one field may automatically populate the selections for following fields.

The table below provides an overview of required and non-required fields on the requisition for Legal Pending Req.

Requisition Fields	Key Information
*Title	Name the req. e.g. Legal Pending Req
*Description	Enter the same information as entered in Title.
*Owner	Select yourself for both of these fields (legal office).
*Manager	Select yourself for both of these fields (legal office).
*Volunteers Requested (PCV, PCR and TCR reqs only)	This defaults to 1. There is no limit on the number of Candidates in Req so you should leave this as 1.
*Req Team	Select the two legal eligibility specialists. The Placement Team Lead overseeing the Legal Team may also be selected as well as the Placement Manager. To select more than one member, highlight yourself and then press CTRL on the keyboard and highlight other req team members.
Turn off Autofiler notification for this req	The default shows no check in the box; click the box to add a checkmark.
*Notify upon approval completion	Select yourself from the drop-down menu.

\* = required field

4. Click **Save and continue**.



- The Route req to open or save req as approved page is launched. It is important to note that while reqs are opened, they are **NOT** posted to Talent Gateways. Click Open req.

Route req to open or save req as approved. Help

Select Request Type > Edit Req Form > Step 3: Send notification

Req 414BR : Legal Pending has been created.

To send a message with this req when opening it or saving it to approved reqs, enter your message below.

Your message

☐ CC: Req team

Open req Save req to approved reqs

- Posting to Talent Gateways and PCV Legal Pending Req:** Once the Open req button has been clicked, the posting options screen is displayed. PCV Legal Pending reqs are not posted to any Talent Gateway. You will not select any Gateway site.

Open req 414BR Legal Pending Help

Do you want to open 414BR : Legal Pending?

Posting 414BR : Legal Pending Select job posting preview

Talent Gateways

Select all	Gateway site	Repost	Days until posted	Days to remain posted	Currently posted	Posted date	Removal date	Select Gateway Questionnaire	GQ Details	Edit site questions
<input type="checkbox"/>	OMB - Demo	Repost	00	365				None	Expand	
<input type="checkbox"/>	Peace Corps - Evergreen Req	Repost	00	365				None	Expand	

Reset Gateway Questionnaire(s) to default

There are no third party posting options.

Update all postings Cancel Refresh

- To complete the req process, click **Update all postings** > the confirmation page indicating the req has been opened is launched. Click **OK**.

**The req 414BR: Legal Pending has been opened.**





8. Req Team, Owner and Manager will receive a notification when the req is open.
9. Click the hyperlink to [View the req.](#)



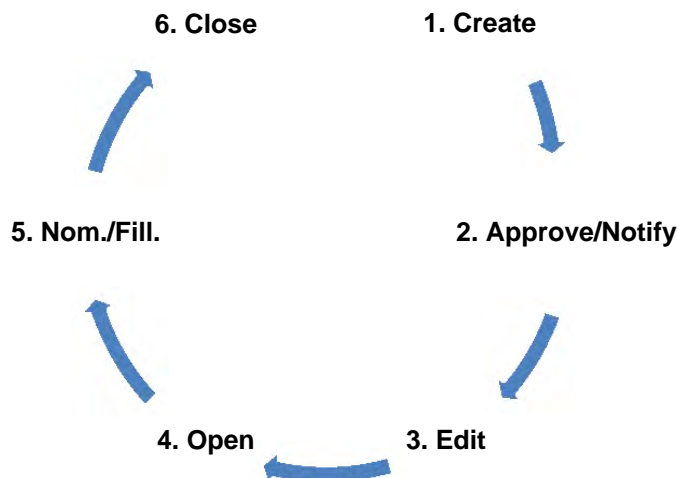
## Chapter 17: Non-Standard Reqs- Medical Pending Req

Candidates are moved by Recruitment into the Medical Pending Req at the time of nomination if the Medical SORT Form indicates the Candidate needs to see a doctor and provide more medical information. Once a candidate provides the necessary information and is deemed qualified by medical, via integration, their status will change to Nomination Cleared. Placement needs to monitor the Medical Pending Req and move any Candidates with the status of Nomination Cleared to an appropriate JSR.

The following provides an overview for Medical Pending Req. Placement will create this req. The Medical Pending Req will be created one time. Candidates are moved into the Medical Pending Req if their HR Status is Nomination Medical Pending. See Appendix B, Additional Processes, Nomination/Medical Process for more information.

### **Section 17.1: Medical Pending Req Lifecycle**

The Medical Pending Req is created and opened without an approval process. The owners of this req are the Placement office.



1. **Create** - A req is first created with the req form. The req creator opens and begins to fill in the correct form.
2. **Approve/Notify** - The Medical Pending Req requires no approval routing, it is approved by completing the req form. The owner, manager, and notify upon approval fields in the req form will ensure that once the req is open the appropriate users are notified.
3. **Edit** - The req creator will fill in the rest of the req form.
4. **Open** - Once approved and revised, the req is ready to be opened. Opening the req allows users to start viewing and working with the req
5. **Nominate/Fill.** Those candidates that have HR Status Nomination Medical Pending are copied into this req.
6. **Close** - Finally, once the req has no more active candidates inside it, the req can potentially be closed. However, candidates that are deemed Nomination Medical Pending may be in this req for quite a while depending on the issue.



## Section 17.2: Medical Pending Req Form

1. Navigate to the **Reqs** tab > Add new req > **Medical Pending Req**

Reqs	Candidates	Admin
View all reqs		
View my reqs		
Add new req		
View my drafts		
Add my req		
Search reqs		

PCV Evergreen Req

PCV Job Specific Req

PCV Married Couples Req

PCV Master's International Req

PCV Medical Pending Req

PCV Recruiter Req

PCV Retired Candidates Req

PCV Training Class Req

2. The Select Request type page is displayed. Use the drop-down arrow in the Request Type box and select **MED000 Medical Pending Req**.

+ Select Request Type

Help

Step 1: Select Request Type

\* Request Type 

MED000 Medical Pending

[Selection details](#)

\* = required field

Continue >>

Cancel

3. Click **Continue >>**. The Add a new req page displays. On the requisition form, you must enter information for all required fields, which are noted with a red asterisk. It is best practice to complete the form from top to bottom, as the selection for one field may automatically populate the selections for following fields.

The table below provides an overview of required and non-required fields on the requisition for Medical Pending Req.



Requisition Fields	Key Information
*Title	Name the req. I.E. Medical Pending Req
*Description	Enter the same information as entered in Title.
*Owner	Select yourself in these fields (Placement office)
*Manager	Select yourself in these fields (Placement office)
Volunteers Requested (PCV, PCR and TCR reqs only)	This defaults to 1, but can be changed.
*Req Team	Select the Placement and Medical office personnel to be notified regarding this req. To select more than one member, highlight yourself and then press CTRL on the keyboard and highlight other req team members.
Turn off Autofiler notification for this req	The default shows no check in the box; click the box to add a checkmark to not receive notifications.
*Notify upon approval completion	Select yourself from the drop-down menu.

\* = required field

- Click **Save and continue**.
- The Route req to open or save req as approved page is launched. It is important to note that while Medical Pending Reqs are opened, they are **NOT** posted to Talent Gateways. Click Open req.

Route req to open or save req as approved.

[Select Request Type](#) > [Edit Req Form](#) > Step 3: Send notification

Req 423BR : Training Medical Pending has been created.

To send a message with this req when opening it or saving it to approved reqs, enter your message below.

Your message

☐ CC: Req team





6. **Posting to Talent Gateways and PCV Medical Pending Req:** Once the Open req button has been clicked, the posting options screen is displayed. Medical Pending reqs **are not posted** to any Talent Gateway (meaning it is not visible to the general public.) You will not select any Gateway site.

Open req 423BR Training Medical Pending

Do you want to open 423BR : Training Medical Pending?

Posting 423BR : Training Medical Pending

Talent Gateways

Select all	Gateway site	Repost	Days until posted	Days to remain posted	Currently posted	Posted date	Removal date	Select Gateway Questionnaire	GQ Details	Edit site questions
<input type="checkbox"/>	OMB - Demo	<input type="button" value="Repost"/>	00	365				None <input type="button" value="Expand"/>		<input type="button" value="Edit"/>
<input type="checkbox"/>	Peace Corps - Evergreen Req	<input type="button" value="Repost"/>	00	365				None <input type="button" value="Expand"/>		<input type="button" value="Edit"/>

There are no third party posting options.

7. To complete the req process, click **Update all postings** > the confirmation page indicating the req has been opened is launched. Click **OK**.

Open req 423BR Training Medical Pending

The req 423BR: Training Medical Pending has been opened.

8. Req Team, Owner and Manager will receive a notification when the req is open.
9. Click the hyperlink to [View the req](#).

Subject: A new req has been opened: (423BR, Training Medical Pending)

**Title:** Training Medical Pending  
**Req ID:** 423BR  
**Message:** This is for training screenshots

Zdemo, Training04 has sent you an *eLink* to view.  
Please use the link below to access the req.

[View the req](#)



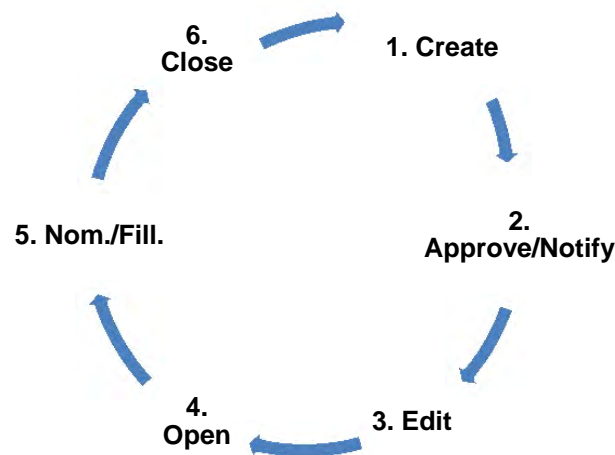
## Chapter 18: Non-Standard Reqs – Master’s International Req

The following provides an overview for creating Master’s International Reqs. This chapter includes:

- Reviewing Master’s International (MI) Req Lifecycle
- Creating a Master’s International Req

### Section 18.1: Master’s International Req Lifecycle

The Master’s International Reqs (MIR) will be created by one person on the Placement Team. The reqs will be created at the beginning of each fiscal year. One MIR will be created for each of the six sectors so a total of 24 Reqs will be created each year. These reqs are created without an approval and remain open as long as there are active candidates in the req.



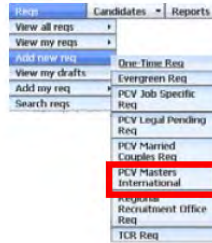
1. **Create** - A req is first created with the req form. The req creator opens and begins to fill in the correct form.
2. **Approve/Notify** - The Master’s International Req requires no approval routing, it is approved by completing the req form. The “owner”, “manager”, and “notify upon approval” fields on the req form will ensure that once the req is open the appropriate users are notified.
3. **Edit** - The req creator will fill in the rest of the req form.
4. **Open** - Once completed, the req is ready to be opened. Opening the req allows users to start viewing and working with the req.
5. **Nominate/Fill** – There is no specific nomination/fill for this req. This req serves as a holding pool req to organize candidates’ information for the Master’s International Program per quarter and per sector (e.g. Health, Education, etc).
6. **Close** - Finally, once the req has no more active candidates inside it, the req is closed.

### Section 18.2: Creating a Master’s International Req



Creating a Master's International Req begins with filling in the correct req form. To get to the req form, you go to the main Req tab and add a new req.

1. Navigate to the **Reqs tab** > Add new req > **PCV Masters International**.



2. The Request type page is displayed. Use the drop-down arrow in the Request Type box and select 197 197-Masters International.

3. Click **Continue >>**. The Add a new req page displays. On the req form, you must enter information for all required fields, which are noted with a red asterisk. It is best practice to complete the form from top to bottom, as the selection for one field may automatically populate the selections for following fields.



The table below provides an overview of required and non-required fields on the requisition for Master's International Req.

Requisition Fields	Key Information
* <b>Request Type</b>	This is the name of the request type and populates from the selection on the previous step's drop down menu.
* <b>Title</b>	Name the req following this protocol: MI Sector Q* FY**, e.g. MI Ag Q2 FY13.
* <b>Description</b>	Same as the title
* <b>Owner</b>	Select yourself for both of these fields.
* <b>Manager</b>	Select yourself for both of these fields.
* <b>Volunteers Requested (PCV, PCR and TCR reqs only)</b>	There is no limit on Candidates in this Req so leave as 1.
<b>Fiscal Year</b>	Select appropriate year from drop-down menu.
<b>Fiscal Quarter</b>	Select appropriate quarter from drop-down menu.
* <b>Req Team</b>	Select yourself and the Placement Specialist associated with each respective sector. To select more than one member, highlight yourself and then press CTRL on the keyboard and highlight other req team members.
<b>Turn off Autofiler notification for this req</b>	The default shows no check in the box; do not make a selection for this field.

\* = required field

4. Click **Save and continue**.

5. The **Route req** to open or save req as approved page is launched. It is important to note that while the Masters International Reqs are opened, they are **NOT** posted to Talent Gateways. Click Open req.

**Note:** Each year 24 Master's International Reqs will be created. There are 6 main sector areas: Agriculture, Community Economic Development, Education, Environment, Health and Youth in Development. Master's International Reqs are created for each Fiscal Year, Quarter and Sector.



## Opening a PCV Masters International Reqs:

Once the Open req button has been clicked, the posting options screen is displayed. PCV Masters International reqs **are not posted** to any Talent Gateway. You will not select any Gateway site.

Open req 413BR MI Q4 13 Education ? Help

Do you want to open 413BR : MI Q4 13 Education

Posting 413BR : MI Q4 13 Education [Select job posting preview](#)

**Talent Gateways**

Select all	Gateway site	Repost	Days until posted	Days to remain posted	Currently posted	Posted date	Removal date	Select
<input type="checkbox"/>	OMB - Demo	<a href="#">Repost</a>	00 ▾	365 ▾				None
<input type="checkbox"/>	Peace Corps - Evergreen Req	<a href="#">Repost</a>	00 ▾	365 ▾				None

[Reset Gateway Questionnaire\(s\) to default](#)

**There are no third party posting options.**

[Update all postings](#) [Cancel](#) [Refresh](#)

1. To complete the req, click **Update all postings** > the confirmation page indicating the req has been opened is launched. Click **OK**.



### 18.3 How to Process Masters International Candidates

1. Once a req is opened, candidates that are eligible to be nominated (nomination cleared or nomination validation required) can be moved into the MIR.
2. Once moved, HR Status changes to Nomination Cleared or Nomination Validation Required.
3. An appropriate JSR for the Master's International candidates is created.
4. Once the appropriate JSR is created, then the MI candidates are moved from the MIR to the JSR.
5. Once their invitation letter is sent out and they accept it. They are moved into their TCR and HR Status changes to Invitation Accepted.
6. MI Candidate travel through the rest of the HR Statuses towards becoming a Volunteer.

#### Exceptions:

- If MI Candidate is part of a married couple or both are MIs, then they must travel together through the nomination/medical process.
- If one MI Candidate spouse has a medical issue, both candidates remain in the Medical Pending Req together.
- If an MI Candidate passes nomination/medical process, they may have to wait to be moved into their JSR as only certain one's are available each quarter/annually.





## Chapter 19: Non-Standard Reqs – Married Couples Req

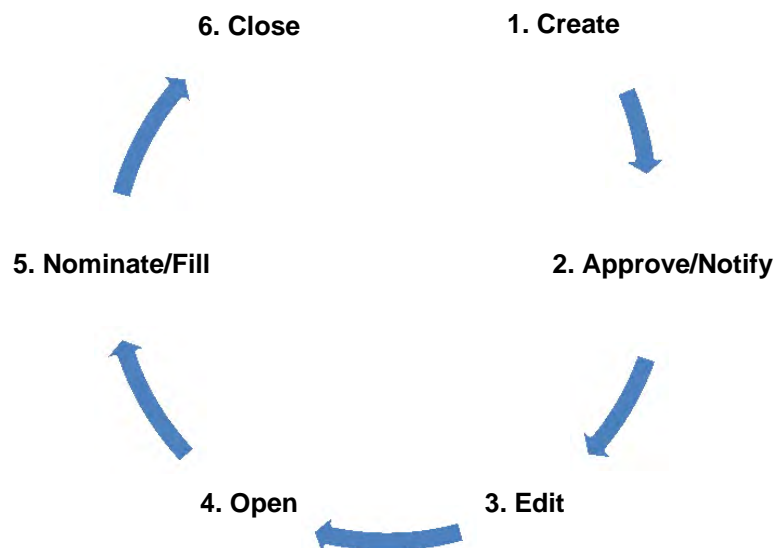
Married Couples may apply to the Peace Corps to serve together in the same country. Married Couples are not accepted in every country and countries request that each spouse qualifies for specific assignments.

The following provides an overview for creating Married Couples Reqs (MCR). This chapter includes:

- Reviewing Married Couples Req Lifecycle
- Selecting the correct Req Form

### Section 19.1: Married Couples Req Lifecycle

Married Couples are processed in DOVE through the PCV Married Couples Req (MCR). Married Couples Req's are created without an approval process on a quarterly basis for specific countries and remain open as long as there are active candidates in the req. Candidates are moved into an MCR from the Recruiter Req to continue their shared processing. Once they are both at the HR Status of Nomination Cleared they can be put into their separate JSRs. Once they are invited and they accept their invitation they are copied from their JSRs to the same TCR, so they can serve together.



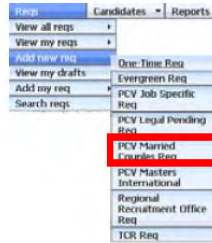
1. **Create** - A req is first created with the req form. The req creator opens and begins to fill in the correct form.
2. **Approve/Notify** - The MCR requires no approval routing, it is approved by completing the req form. The “owner”, “manager”, and “notify upon approval” fields on the req form will ensure that once the req is open the appropriate users are notified.
3. **Edit** - The req creator will fill in the rest of the req form.
4. **Open** - Once completed, the req is ready to be opened. Opening the req allows users to start viewing and working with the req. These Reqs are opened on a quarterly basis.
5. **Nominate/Fill** – Recruitment nominates married couples in this req. Each MCR has a limit to the number of couples it can take. This req serves as a holding pool req to organize married couples’ information.
6. **Close** - Once the req has no more active candidates inside it, the req is closed.



## Section 19.2: Creating Married Couples Req

Creating a Married Couples Req involves accessing the right req form.

1. Navigate to the **Reqs tab** > Add new req > select PCV Married Couples Req



2. Select the **request type** from the drop down menu > 200 200-Married Couples

Step 1: Select Request Type

\* Request Type: 200 200-Married Couples

\* = required field

Continue >> Cancel

3. **Edit** the req form.

Placement will fill in the below fields to create the Married Couples Req.

Requisition Fields	Key Information
*Title	Name the req following this protocol:– “MCR Post Q* FY**”, e.g. MCR Namibia Q3 FY13”
*Description	Insert the Post name in the description followed by the same information entered in the Title.
*Owner/Manager	Select yourself for both of these fields.
*Volunteers Requested (PCV, PCR and TCR reqs only)	The number entered will be the total of all Spouses/candidates in the individual JSR. This is 2 volunteers requested if one couple or 4 volunteers if two couples and so forth.
*Maximum Couples in Training Class	The number entered cannot be more than what is stated on the individual JSR. This will also reflect the maximum number of couples in the entire training class.
*No. of Nominations Needed	Number of nominations required is based on the known supply and demand.
Candidate Limit Status	Change to Unfilled
*Region	Select the region from the drop-down menu. Once the region has been selected, the screen refreshes and allows the country to be entered. Enter the PST date and other dates as required.
Sub-Region	Select the sub-region from the drop down menu.



	Once the sub-region is selected, the screen refreshes and allows the country to be entered
<b>Country</b>	Select the country from the drop down menu.
<b>*PST Start Date</b>	Select the appropriate date. Use the calendar icon to assist in making selections. Deadlines should correspond to the dates in the JSR.
<b>Staging Start Date</b>	Select the appropriate date. Use the calendar icon to assist in making selections. Deadlines should correspond to the dates in the JSR.
<b>Invitation Deadline</b>	Select the appropriate date. Use the calendar icon to assist in making selections. Deadlines should correspond to the dates in the JSR.
<b>Last Nom Date</b>	Select the appropriate date. Use the calendar icon to assist in making selections. Deadlines should correspond to the dates in the JSR.
<b>Matching Partner's AA</b>	This indicates that the spouses can serve in these AAs based on the couple's information on the JSR. To make more than one selection, press CTRL on the keyboard and highlight additional selections.
<b>AA Combo Exclusions</b>	List any exclusions stated on the JSR.
<b>*Individual Req Ids</b>	This is the ReqID associated with the individual JSR for this MCR.
<b>Post Couples Comments</b>	Enter comments as necessary to help with review process based on information in corresponding JSRs.
<b>Living Conditions</b>	Select the living conditions that appeared on the JSR. To select more than one, press CTRL on the keyboard and highlight selections.
<b>Living Conditions Comments</b>	Enter comments as necessary to help with review process.
<b>Language Skills</b>	Enter the same language requirements as indicated on the JSR
<b>*Accepts Master's International Candidates</b>	Enter the same answer as indicated on the JSR
<b>*Req Team</b>	Select anyone within Placement associated with the skills desks responsible for each of the JSRs.
<b>Turn off Autofiler notification for this req</b>	The default shows no check in the box; click the box to add a checkmark.
<b>Notify upon approval completion</b>	Select yourself from the drop-down menu.

\* = required field

4. Click **Save and continue**.

Save and continue >>

5. The "Route req to open or save req as approved" page is launched. It is important to note that while MCR reqs are opened, there is no approval process and they are NOT posted to Talent Gateways. Click Open req. MCRs are also opened on a quarterly basis.



Route req to open or save req as approved.

Select Request Type > Edit Req Form > Step 3: Send notification

Req 200 200-Married Couples has been created.

To send a message with this req when opening it or moving it to approved reqs, enter your message below.

Your message

☐ CC: Req team

6. Posting to Talent Gateways and PCV Married Couples Req: Once the Open req button has been clicked, the posting options screen is displayed. PCV Legal Pending reqs are not posted to any Talent Gateway. You will not select any Gateway site.

Open req 414BR Legal Pending

Do you want to open Married Couples Req ?

Posting Married Couples Req

Talent Gateways

Select all	Gateway site	Repost	Days until posted	Days to remain posted	Currently posted	Posted date	Removal date	Select Gateway Questionnaire	GQ Details	Edit site questions
<input type="checkbox"/>	OMB - Demo	Repost	00	365				None	Expand	
<input type="checkbox"/>	Peace Corps - Evergreen Req	Repost	00	365				None	Expand	

There are no third party posting options.

7. To complete the req process, click **Update all postings** > the confirmation page indicating the req has been opened is launched. Click **OK**.

The req 414BR Married Couples Req been opened.

8. Req Team, Owner and Manager will receive a notification when the req is open.
9. Click the hyperlink to [View the req](#).



## Chapter 20: Social Source

Social Source is the marketing outreach component of DOVE. Recruitment (including public affairs) will be using this section of DOVE.

Social Source offers these users the ability to:

- Access Social Source from the DOVE Dashboard
- Create and Manage Campaigns (Events)
- Manage Leads
- Report on Campaigns and Leads
- Create and Utilize Distribution Lists
- Communicate with Leads through Messages and E-mail Blasts

The following table provides an overview of some commonly used terms within Social Source.

Social Source Term	Definition
<b>Social Source</b>	Marketing and Outreach module within DOVE.
<b>Lead</b>	Potential prospect for Peace Corps Volunteer. Persons that are in the information gathering stage. Have not yet submitted an application to become a volunteer
<b>Campaign</b>	Used to create a Peace Corps Event, e.g., an Information Session
<b>Distribution Lists</b>	Lists of contact information for groups of leads to be used in messaging and blasts
<b>Blasts</b>	Messaging sent to an entire group or campaign
<b>Region</b>	State e.g., Texas
<b>Group</b>	Regional Office, e.g. Mid-Atlantic Region
<b>CRM System</b>	Customer Relationship Management System, the manufacturer's internal name for Social Source
<b>UDF (User defined fields)</b>	Fields that Peace Corps creates and configures to address specific information needs
<b>Core Fields</b>	System Fields that are part of the default configuration



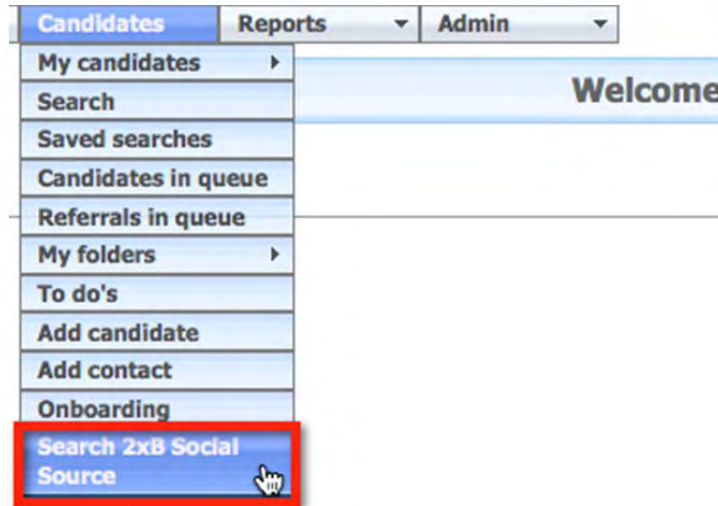
## Section 20.1: Accessing Social Source

Social Source is accessible two ways—through the Candidates Tab and through the Social Source panel.

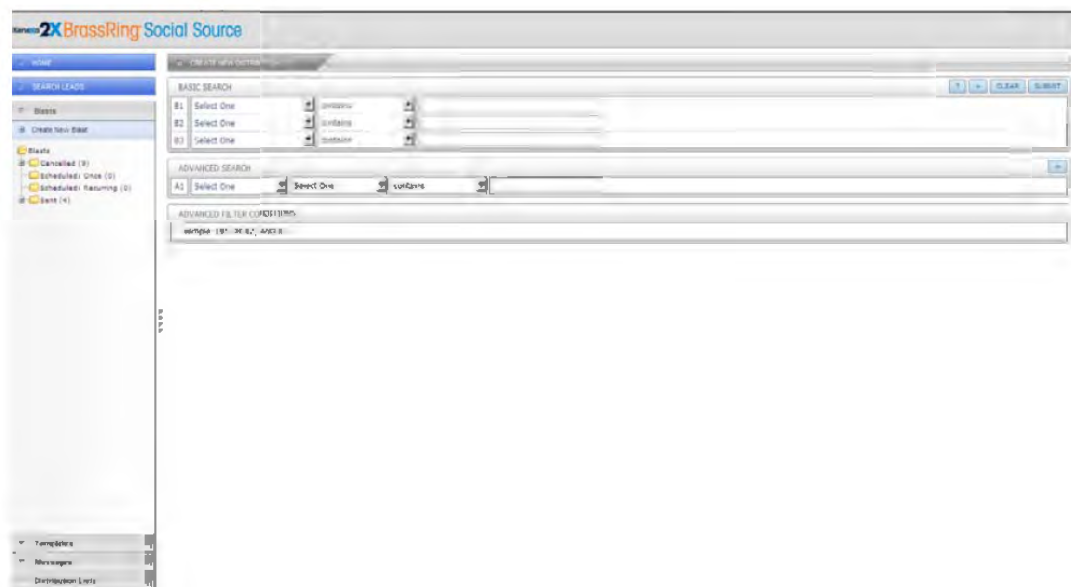
### Accessing Social Source from Candidates tab

Go to the Candidates tab.

Select the Search 2xB Social Source option from the drop-down menu.



This will open the Social Source Search Leads page in another window.





Once in Social Source users can start by searching for leads or can access numerous options within the system on other pages.

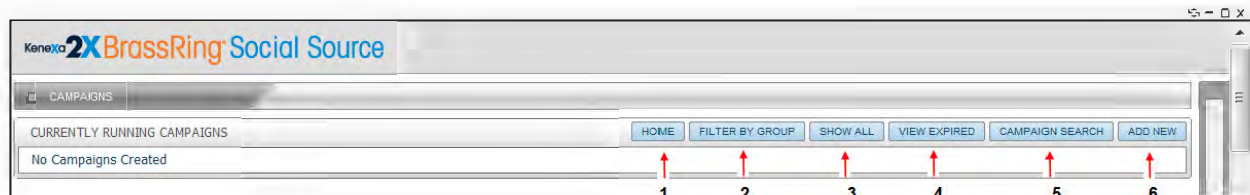
## Accessing the Social Source Panel in DOVE

Upon accessing DOVE, the DOVE Dashboard displays. The DOVE Dashboard is comprised of panels of information, which can include the Social Source panel. The panel provides a Home link that will open a new window allowing you to see the full Social Source homepage.



## Social Source Panel Features in DOVE

The below panel appears on the DOVE Dashboard and allows you to view and take actions on the campaigns you have created. The accompanying table describes the features on the Social Source panel.



Feature	Action
1. Home	Opens the Social Source homepage in a separate window, allowing users to work with campaigns, leads, messages, templates and blasts.
2. Filter by Group	Allows you to filter content by group, e.g., Atlanta, Seattle or Dallas.
3. Show All/Show Mine	Clicking Show All displays all campaigns whether created by you or other users of the system. Clicking Show Mine displays only campaigns created by you.
4. View Expired	Displays all campaigns that have ended.
5. Campaign Search	Search for specific campaigns based on search criteria selected, such as Recruiter, Event Type



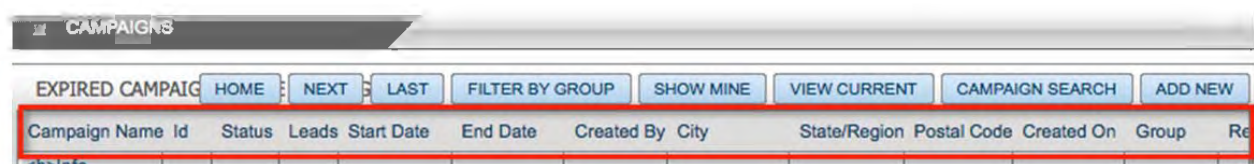


	School Name, etc.
<b>6. Add New</b>	Opens the Create Campaign page in a separate window allowing you to create new campaigns.

## Social Source Panel Columns within the DOVE Dashboard

The Social Source panel within DOVE is set to display currently running Campaigns and is comprised of several columns in an output grid that provides details about each campaign. Some columns provide dynamic hyperlinks, which when clicked open a new window within Social Source.

*The below graphic shows some of the active column fields in the Campaign output grid within the Social Source panel.*



*The below table shows the main column fields.*

Column Field	Description
<b>Campaign Name</b>	Click this link to open a window in Social Source to see campaign details
<b>ID</b>	The unique ID number associated with each campaign
<b>Status</b>	Indicates if the campaign is currently running or expired
<b>Leads</b>	A number in the column indicates the number of leads associated to the campaign, click the link to see details on the lead and view the lead(s) profile
<b>Start Date and End Date</b>	Two fields indicating when the campaign starts and when it ends
<b>Created By</b>	Provides the campaigns original creator
<b>City, State/Region, and Postal Code</b>	Three fields providing the geographic location of the campaign
<b>Created On</b>	Date the campaign was created
<b>Group</b>	Regional office that is hosting the campaign, e.g. Seattle, Dallas, or L.A.



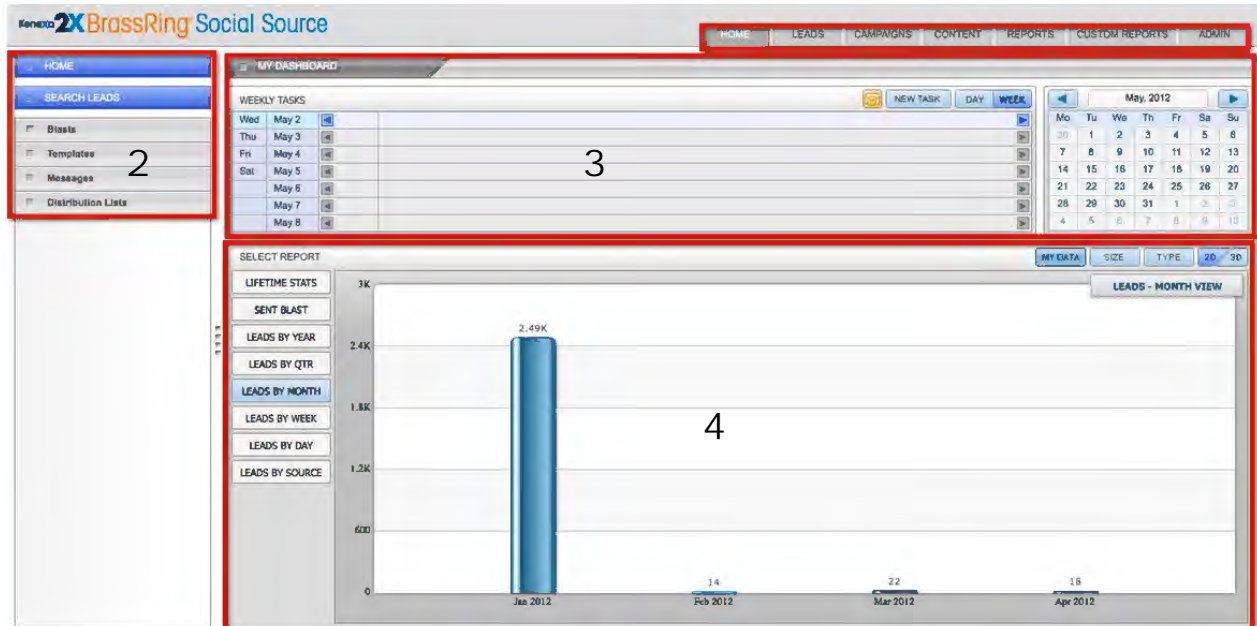
Column Field	Description
Recruiter	Indicates the recruiter who created the campaign and is in charge of it
School Name	If the campaign takes place on a school campus this field is populated
Non-School Location	If the campaign takes place in the community or non-school location this field is populated
Event Type	Details of what type of event is being held, e.g. information session, tabling, etc...
Category	This refers to how or where the campaign was presented. Options include school, non-school location, online, or on-demand.



## Section 20.2: Social Source Dashboard in Social Source

Once a link is clicked from the Social Source panel within DOVE, the Social Source Dashboard will open in a separate window. An interface structure of tabs, navigation bar and windows provide access to the different features available in Social Source.

### Sections in the Social Source Dashboard

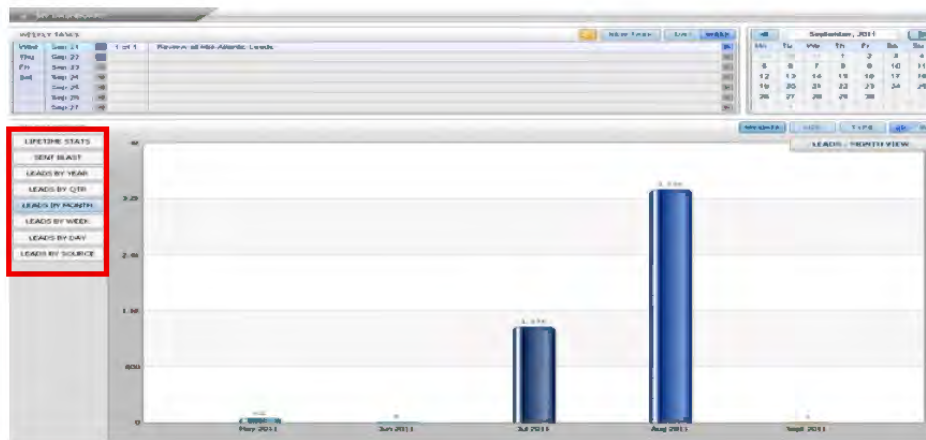


**1. Tabs:** The tabs located on the top right hand side of the page allow for navigation between the Home page, Leads, Campaigns, Content, and Reports (both standard and custom reports), and, for certain user types, Admin settings.

**2. Navigation Bar:** The navigation bar located on the left hand side of the page provides access to distribution lists, messages, templates and blasts. Clicking the box next to the heading name will expand the menu. The width of the bar can be changed by clicking and dragging the four dots to the right of the navigation bar to resize.

**3. Tasks and Calendar Area:** Shows users tasks and calendar.

**4. Select Report:** This area shows information on leads and sent blasts. Users can select various report options from the left of the chart.





## Task and Calendar Area:

The Tasks/Calendar area is used to view weekly tasks and create new tasks. Tasks are used to keep track of activities to complete in order to manage campaigns and follow up with leads.

WEEKLY TASKS		NEW TASK		DAY		WEEK	
Tue	Sep 20						
Wed	Sep 21						
Thu	Sep 22						
Fri	Sep 23						
Sat	Sep 24						
	Sep 25						
	Sep 26						

September, 2011						
Mo	Tu	We	Th	Fr	Sa	Su
29	30	31	1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	1	2
3	4	5	6	7	8	9

The calendar can be used to navigate from month to month by clicking the

Click the date of the week on the calendar to display daily tasks. Daily tasks can be scrolled through by clicking the arrow heads either left or right.

### To create a New Task:

1. Click **New Task**, a new panel is displayed.
2. Enter the **Task Detail** such as the task name and any activity to be completed.
3. Select a **Due Date**. Use the calendar icon to assist in selecting a date.
4. Click **Create**.

CREATE NEW TASK		CANCEL		CREATE	
Task Detail	Review all Mid-Atlantic Leads				
Due Date	09 / 20 / 2011				

5. The task will display in the Weekly Tasks list.

WEEKLY TASKS		NEW TASK		DAY		WEEK	
Wed	Sep 21	1 of 1	Review all Mid-Atlantic Leads				
Thu	Sep 22						
Fri	Sep 23						
Sat	Sep 24						
	Sep 25						
	Sep 26						
	Sep 27						

## Syncing with your Outlook Calendar

Once you have entered tasks click the Outlook icon to the left of the New Task button to sync your tasks in Social Source with your Outlook Calendar. This may require administrative approvals before working.



## Section 20.3: Adding Leads

Social Source provides you with the ability to quickly add leads to the system.

Currently there are four ways for leads to be entered into the Social Source:

1. A potential Candidate clicks on the “Get More Information” button on the Peace Corps website. The interested party will complete basic information, which is auto-uploaded into the system.
2. A person registers for a particular event/campaign online. Events are posted on the Peace Corps website with a registration link that collects basic information: first name, last name, email address and zip code.
3. Manual entry into Social Source by a Peace Corps employee or intern.
4. File upload from an MS Excel document.

### To add a lead manually into Social Source:

1. From Social Source, click the **Leads tab** or the **Add a Lead button**.

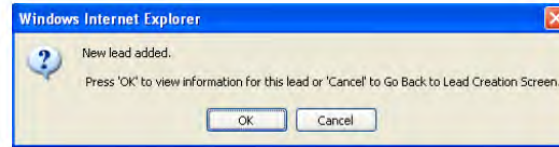
The screenshot shows the 'Kenoxo2X BrassRing Social Source' interface. On the left sidebar, the 'ADD A LEAD' button is highlighted with a red rectangle. The main content area is titled 'LEADS' and contains several sections: 'CREATE A NEW LEAD VIA RESUME UPLOAD' with a 'Browse Files' button and a 'CREATE' button; 'New Leads' with a 'Select Campaign' dropdown and a 'CREATE' button; 'UPLOAD MULTIPLE LEADS FROM .CSV OR EXCEL' with links for 'CSV Upload - Files List', 'New Leads', and 'Invitation'; and 'SEARCH DUPLICATE LEADS' with a 'Select Criteria' dropdown and a 'SEARCH' button.

2. All fields with a **red asterisk** must be completed. If additional information is available outside of the required fields, enter that information as well.

3. Click **Create**. 



4. A pop-up window displays indicating New lead added. Click **OK** to go to the Lead Overview page. (Click **Cancel** to create the lead but go back to the Lead Creation Screen.)



5. The **Lead Overview** page displays, providing additional details for the Lead. Review the Profile Completion percentage to determine additional information that may be added for the lead.

6. Select **General** to view more info. The General tab allows users to enter additional information such as lead status, postal code, date available, etc. (This page may take up to 30 seconds to load.)
7. If any changes are made, select **update** to save.
8. A confirmation message indicates your update is successful. Click **OK**.





Additional tabs located across the Lead page include:

- **Campaigns** – Identifies campaigns lead is associated with through attendance RSVPing, etc.
- **Histories** – Shows details on Opt-In/Opt-Out, emails sent to and read by the lead and the different sources associated with the lead

The following are not used by Peace Corps and may not be visible in future versions:

- **Activities** – Shows notes and tasks details and allows you to enter notes
- **Other Info** – Add attachments, work history and education experience

### Uploading leads into Social Source from an Excel file:

1. From the **Leads** page, see the section Upload Multiple Leads From .CSV or Excel section of the page.

KeneXa 2X BrassRing Social Source

HOME LEADS CAMPAIGNS CONTENT REPORT

HOME

ADD A LEAD

SEARCH LEADS

Blasts

Templates

Messages

Distribution Lists

LEADS

CREATE A NEW LEAD VIA RESUME UPLOAD

Browse Files Browse

New Leads

Campaign Select Campaign

First Name\*

Last Name\*

Email Address\*

Mobile Number

Phone Number - Work

UPLOAD MULTIPLE LEADS FROM .CSV OR EXCEL

CSV Upload - Files List Review the status of .csv or Excel files that have been uploaded

New Leads Click to upload new leads via .csv or Excel file

Invitation Click to upload a list of people to invite to apply or opt in via a landing page

SEARCH DUPLICATE LEADS

Criteria Select Criteria

View deleted duplicates





2. Select **New Leads** to upload leads via .csv or Excel file.

UPLOAD MULTIPLE LEADS FROM .CSV OR EXCEL	
CSV Upload - Files List	Review the status of .csv or Excel files that have been uploaded
<b>New Leads</b>	Click to upload new leads via .csv or Excel file
Invitation	Click to upload a list of people to invite to apply or opt in via a landing page

3. On the Import Leads and Upload page select the Source of the leads from the drop down menu, select 'Yes' on the Header Row drop down menu and

IMPORT LEADS AND UPLOAD

UPLOAD LEADS UPLOAD CANCEL

From this page you can import a list of leads. Your list must be in a CSV (comma separated values) or XLS format. Please don't include headers in file content.

Source	Select One
HeaderRow	Yes
Browse Files	Browse

*This is the Import and Leads Upload Page. It appears when New Leads is selected.*

IMPORT LEADS AND UPLOAD

UPLOAD LEADS UPLOAD CANCEL

From this page you can import a list of leads. Your list must be in a CSV (comma separated values) or XLS format. Please don't include headers in file content.

Source	Select One
HeaderRow	No
Browse Files	Yes

*Make sure to select Yes from the HeaderRow field.*

4. Click Browse to find your Excel file for upload.

IMPORT LEADS AND UPLOAD

UPLOAD LEADS UPLOAD CANCEL

From this page you can import a list of leads. Your list must be in a CSV (comma separated values) or XLS format. Please don't include headers in file content.

Source	Select One
HeaderRow	Yes
Browse Files	<b>Browse</b>

5. After you have selected your Excel file for upload click the **Upload** button

IMPORT LEADS AND UPLOAD

UPLOAD LEADS **UPLOAD** CANCEL

From this page you can import a list of leads. Your list must be in a CSV (comma separated values) or XLS format. Please don't include headers in file content.

Source	Select One
HeaderRow	Yes
Browse Files	Browse



6. In the Mapping Lead – Basic Info section match the basic fields—Email Address, Last Name, First Name—with the corresponding column headers within the Excel spreadsheet, which automatically appear in the dropdown menu.

IMPORT LEADS AND UPLOAD

MAPPING LEAD - BASIC INFO

Cancel NEXT

Email Address FIRST

Last Name Select One

First Name FIRST

Lead Id LAST

Mobile Number EVENT

MAPPING LEAD - OTHER INFO

ADD FIELD

Address Line1 FIRST

MAPPING LEAD - UDF FIELDS

ADD UDF

Are you at least 18 years old? FIRST

MAPPING LEAD - EDUCATION INFO

ADD

School Name	Study Area	Education Level	City	Region	Country	Completed
FIRST	FIRST	FIRST	FIRST	FIRST	FIRST	Yes

MAPPING LEAD - WORK HISTORY INFO

ADD

Start Date	End Date	Company	Job Title	Address Line1	Address Line2	PostalCode	City	Region	Country
FIRST	FIRST	FIRST	FIRST	FIRST	FIRST	FIRST	FIRST	FIRST	FIRST

7. You may map additional fields to column headers by selecting and adding them in the Mapping Lead – Other Info Section.
8. You may also map to Peace Corps UDF fields as well.
9. When you're done matching fields click **Next**.

10. After selecting **Next**, this will take you to the page confirming that the file has been queued for upload.

Lead CSV Upload - File Information

BACK VIEW UPLOADED FILE LIST

The file has been uploaded, click View Uploaded File List button to view the status.

Source

Uploaded On 2012-06-28 12:28:31

File Test Leads.xlsx



## Searching for and removing duplicate leads:

1. From the **Leads** page select criteria for finding duplicates from the drop down menu in the Search Duplicate Leads section of the page and click **Search**.

SEARCH DUPLICATE LEADS

Criteria: Select Criteria

View deleted duplicates

Select Criteria

- First Name And Last Name
- First Name, Last Name, Phone No
- LinkedIn URL
- First Name, Last Name, Address
- First Name, Last Name, City
- Mobile Number

SEARCH

Select Criteria will determine how the duplicate leads are sorted for removal.

SEARCH DUPLICATE LEADS

Criteria: Mobile Number

View deleted duplicates

SEARCH

The criteria (e.g., Mobile Number) is selected and now the search can be performed. (In most cases searching by First Name and Last Name will produce the required results.)

2. Based on the criteria selected the next page will display any duplicate leads.

DUPLICATE LEADS

1 FOUND : SHOWING 1 - 1

HOME

Old Email Address	Old Name	New Email Address	New Name	Merge
██████████@hotmail.com	██████████	██████████@gmail.com	██████████	Merge

3. To merge duplicates click the **Merge** link on the right hand side of the duplicates grid.

HOME

New Name Merge

██████████.com Merge



- On the next page you can select which information to keep from each record with the radial buttons next to the side by side fields.

MERGE DUPLICATE INFO				BACK	REFRESH DATA	MERGE
Date/Time Collected		2011-08-15 11:30:02.0		2011-08-15 11:30:02.0		
Created By User		John Doe10		John Doe10		
Email Address		██████████@hotmail.com		██████████@gmail.com		
Owner		John Doe10		John Doe10		
First Name	<input type="radio"/>	██████████	<input type="radio"/>	██████████		
Last Name	<input type="radio"/>	██████████	<input type="radio"/>	██████████		
PostalCode	<input type="radio"/>	██████████	<input type="radio"/>	██████████		
City	<input type="radio"/>	██████████	<input type="radio"/>	██████████		

- When you are done selecting which fields to keep click the **Merge** button.

MERGE DUPLICATE INFO				BACK	REFRESH DATA	MERGE
Date/Time Collected		2011-08-15 11:30:02.0		2011-08-15 11:30:02.0		
Created By User		John Doe10		John Doe10		
Email Address		██████████@hotmail.com		██████████@gmail.com		
Owner		John Doe10		John Doe10		
First Name	<input type="radio"/>	██████████	<input type="radio"/>	██████████		
Last Name	<input type="radio"/>	██████████	<input type="radio"/>	██████████		
PostalCode	<input type="radio"/>	██████████	<input type="radio"/>	██████████		
City	<input type="radio"/>	██████████	<input type="radio"/>	██████████		

**Note:** A warning appears before the merge is completed. Make sure to note that the old profiles will be deleted.

Old profiles will be deleted after merging. Do you want to continue?

OK Cancel

- Select **OK** to continue with the merge or **Cancel** to cancel the merge.



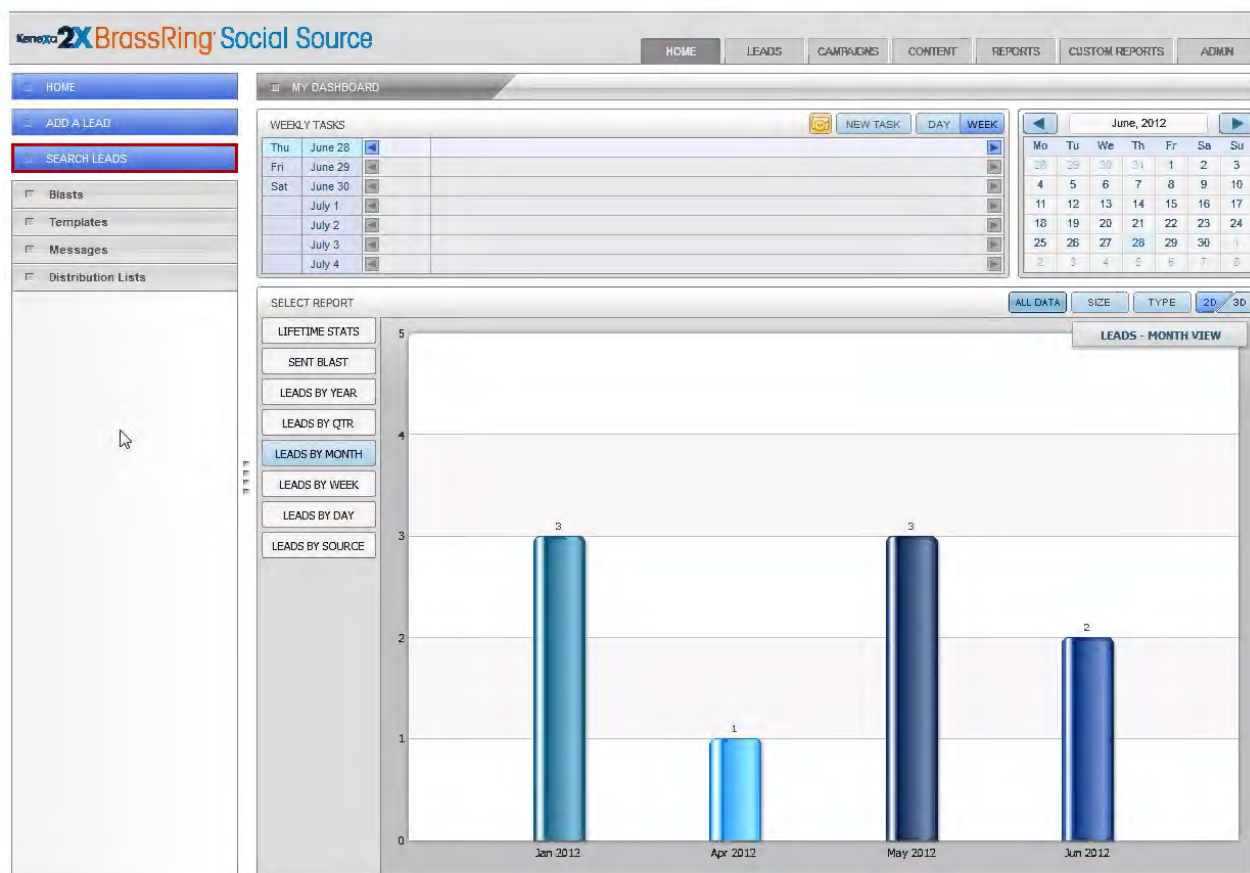
## Section 20.4: Searching Leads

Social Source organizes the leads so that they can be easily searched by a variety of criteria.

### Leads: Searching

To conduct a basic search from the Social Source Dashboard:

1. Click **Search Leads**.







2. The **Create New Distribution List** page is displayed. There are two options available to select search criteria – Basic and Advanced.

- Initially three basic search fields display, however click the + button to add additional search criteria fields. In the Advanced Search section use the + sign to add additional search criteria.
- Advanced searches allows users to search specific Peace Corps User Defined Fields (UDFs), e.g. group (regional office).
- Advanced search filters allow users to search by multiple search criteria in a variety of ways (e.g. (B1 OR B2) AND B3)

3. Select **applicable search criteria** by using the drop-down arrows to display menus and enter search terms in the text field. Click **Submit**.

Applicable Search Criteria include:

- Contains
- Equals
- Not Equal to
- Starts with
- Ends with
- Does not contain



#### 4. Search Results will be displayed.

**FOUND 715 LEAD(S) - 715 OPTED-IN - 0 OPTED-OUT - Page 1 OF 5**

Profile	2x6 Talent Record	Attachments	First Name	Last Name	Email Address	Source	Active Status	Date Created	State	Postal Code	Location
<input type="checkbox"/> View	No		S	A	mail.com	EVENT	Active	08/24/2011	TX	77036	HOUSTON,
<input type="checkbox"/> View	No		A	A	il.com	EVENT	Active	08/24/2011	LA	70605	LAKE CHARLES,LA
<input type="checkbox"/> View	No		E	A	il.com	EVENT	Active	08/24/2011	TX	79415	LUBBOCK, TX
<input type="checkbox"/> View	No		E	A	u	EVENT	Active	08/24/2011	CO	80210	CO
<input type="checkbox"/> View	No		S	A	@gmail.com	EVENT	Active	08/24/2011	TX	77070	HOUSTON,
<input type="checkbox"/> View	No		T	A	oo.com	EVENT	Active	08/24/2011	TX	79416	LUBBOCK, TX
<input type="checkbox"/> View	No		E	A	u	EVENT	Active	08/24/2011	LA	70125	NEW ORLEANS, LA
<input type="checkbox"/> View	No		C	A	oo.com	EVENT	Active	08/24/2011	NM	87106	ALBUQUERQUE, NM
<input type="checkbox"/> View	No		A	A		EVENT	Active	08/24/2011	KS	66203	SHAWNEE, KS
<input type="checkbox"/> View	No		L	A	com	EVENT	Active	08/24/2011	NE	68516	LINCOLN, NE
<input type="checkbox"/> View	No		B	A	@gmail.com	EVENT	Active	08/24/2011	LA	70665	SULPHUR, LA
<input type="checkbox"/> View	No		K	A	@hotmail.com	EVENT	Active	08/24/2011	CO	80439	EVERGREEN, CO
<input type="checkbox"/> View	No		K	A	com	EVENT	Active	08/24/2011	TX	77019	
<input type="checkbox"/> View	No		J	A	com	EVENT	Active	08/24/2011	CO	80602	THORNTON, CO
<input type="checkbox"/> View	No		T	A	il.com	EVENT	Active	08/24/2011	OK	73114	OK
<input type="checkbox"/> View	No		M	A	com	EVENT	Active	08/24/2011	CO	80228	LAKEWOOD, CO
<input type="checkbox"/> View	No		C	A	l.com	EVENT	Active	08/24/2011	TX	75081	RICHARDSON, TX

#### Advanced Search Options with Leads

When using Advanced Search options, you have the ability to conduct searches using user defined fields from within the system and apply filters as well.

1. In the Advanced Search section, click the drop-down arrow to display the selection menu.
2. Select an option. Click the second selection box and select the appropriate option for the search being conducted.
3. In the third selection box, define search parameters
4. Click Submit and search results will display.

#### Using Advanced Filter Conditions

Advanced Filter Conditions allow users to create distribution lists with more refined search parameters. For instance if your basic search field (B1) was 'City equals Seattle' and your advanced search criteria (A1) was 'School equals University of Washington' then your search would return all results that included either one of those. However, if you entered 'B1 and A1' in





the Advanced Filter Conditions field before conducting the same search then the results would only include leads who BOTH lived in Seattle and attended the University of Washington.

### Basic and Advanced Search Options

The following table explains the search options available in Basic and Advanced Search.

Search Option	Description
<b>Contains</b>	Finds results for selected fields that “contain” the value entered, i.e. Region contains TX. Search results will return leads with the criteria entered as the value that is the same or similar.
<b>Equals</b>	The selected field value “equals” the specific value entered, i.e. First Name “equals” Jane. Only persons with the first name Jane will be returned in the results.
<b>Not Equal To</b>	Finds results for the selected field value that is “not equal to” the specific value entered, i.e. First Name “not equal to” Jane will return leads except those with the first name Jane. It would return something such as Jan.
<b>Starts With</b>	Finds results when the selected field value “starts with” the value entered, i.e. First name starts with “jo” returns leads containing Jon, John, but would not return leads such as Jane.
<b>Ends With</b>	Finds results when the selected field “ends” with the value entered, i.e. “es” returns leads containing Jones, Smithes but would not return leads with Jon or Smith.
<b>Does Not Contain</b>	Finds results where the selected field “does not contain” the value entered. Only one specific value can be entered when using this option, i.e. Last Name does not contain “on” will not return leads such as Simeonson, Jackson or Jones.



## Section 20.5: Managing and Working with Leads

Once search results are displayed, you can click the View link in the Profile column to see if the lead has any history.

SEARCH RESULTS

FOUND 715 LEAD(S) - 715 OPTED-IN - 0 OPTED-OUT - Page 1 OF 5

<input type="checkbox"/>	Profile	2xBTalent Record	Attachments	First Name	Last Name	Email Address	Source	Active Status
<input type="checkbox"/>	<a href="#">View</a>		No	S	A	mail.com	EVENT	Active
<input type="checkbox"/>	<a href="#">View</a>		No	A	A	il.com	EVENT	Active
<input type="checkbox"/>	<a href="#">View</a>		No	E	A	il.com	EVENT	Active
<input type="checkbox"/>	<a href="#">View</a>		No	E	A	u	EVENT	Active
<input type="checkbox"/>	<a href="#">View</a>		No	S	A	@gmail.com	EVENT	Active
<input type="checkbox"/>	<a href="#">View</a>		No	T	A	oo.com	EVENT	Active
<input type="checkbox"/>	<a href="#">View</a>		No	B	A	u	EVENT	Active
<input type="checkbox"/>	<a href="#">View</a>		No	C	A	oo.com	EVENT	Active
<input type="checkbox"/>	<a href="#">View</a>		No	A	A	n	EVENT	Active
<input type="checkbox"/>	<a href="#">View</a>		No	L	A	com	EVENT	Active
<input type="checkbox"/>	<a href="#">View</a>		No	B	A	gmail.com	EVENT	Active
<input type="checkbox"/>	<a href="#">View</a>		No	K	A	@hotmail.com	EVENT	Active
<input type="checkbox"/>	<a href="#">View</a>		No	K	A	om	EVENT	Active
<input type="checkbox"/>	<a href="#">View</a>		No	J	A	com	EVENT	Active

List results can also be saved as a distribution list for future blasts or can be exported.

To save or export a list:

1. Using the drop-down menu next to the **Actions** label select the appropriate action.

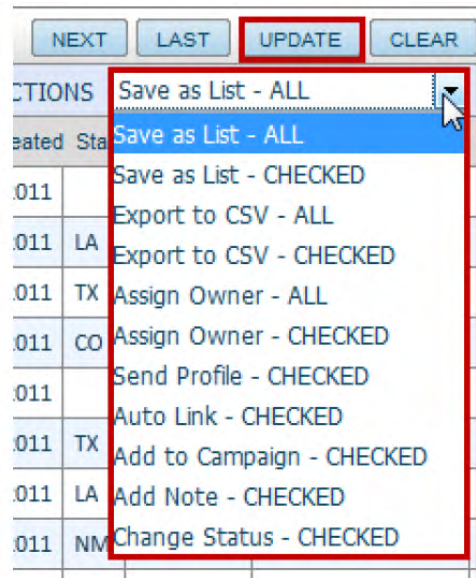
SEARCH RESULTS

FOUND 715 LEAD(S) - 715 OPTED-IN - 0 OPTED-OUT - Page 1 OF 5

<input type="checkbox"/>	Profile	2xBTalent Record	Attachments	First Name	Last Name	Email Address	Source	Active Status	Date Created	State	Actions
<input type="checkbox"/>	<a href="#">View</a>		No						08/24/2011		Save as List - ALL
<input type="checkbox"/>	<a href="#">View</a>		No						08/24/2011	LA	Save as List - ALL
<input type="checkbox"/>	<a href="#">View</a>		No						08/24/2011	TX	Save as List - CHECKED
<input type="checkbox"/>	<a href="#">View</a>		No						08/24/2011	CO	Export to CSV - ALL
<input type="checkbox"/>	<a href="#">View</a>		No						08/24/2011		Export to CSV - CHECKED
<input type="checkbox"/>	<a href="#">View</a>		No						08/24/2011		Assign Owner - ALL
<input type="checkbox"/>	<a href="#">View</a>		No						08/24/2011		Assign Owner - CHECKED
<input type="checkbox"/>	<a href="#">View</a>		No						08/24/2011		Send Profile - CHECKED
<input type="checkbox"/>	<a href="#">View</a>		No						08/24/2011	TX	Auto Link - CHECKED
<input type="checkbox"/>	<a href="#">View</a>		No						08/24/2011	LA	Add to Campaign - CHECKED
<input type="checkbox"/>	<a href="#">View</a>		No						08/24/2011	NM	Add Note - CHECKED
<input type="checkbox"/>	<a href="#">View</a>		No						08/24/2011	KS	Change Status - CHECKED
<input type="checkbox"/>	<a href="#">View</a>		No						08/24/2011	KS	66203 SHAWNEE,KS



2. If you select the **ALL** option the **Action** will apply to every Lead in the list. If you would like the action to apply only to selected leads use the checkboxes on the left hand side of the grid before selecting the CHECKED option and clicking **Update**.




3. Based on the **Action** selected results are saved as a distribution list (see the section 20.8 on distribution lists to learn more) or exported into a CSV file (MS Excel).



## Section 20.6: Campaigns

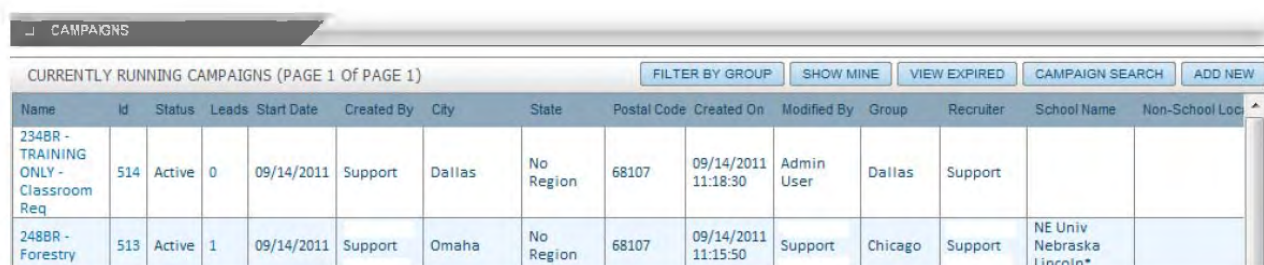
Campaigns are events that are created to generate Leads.

To access the Campaigns page:

1. Click the **Campaigns** tab.  along the top right hand side of the page. If you are on a page where the tabs are not displayed then first click the Home button along the left hand side of the screen.



2. The Campaigns page displays.



└ CAMPAIGNS

CURRENTLY RUNNING CAMPAIGNS (PAGE 1 OF PAGE 1) [FILTER BY GROUP](#) [SHOW MINE](#) [VIEW EXPIRED](#) [CAMPAIGN SEARCH](#) [ADD NEW](#)

Name	Id	Status	Leads	Start Date	Created By	City	State	Postal Code	Created On	Modified By	Group	Recruiter	School Name	Non-School Loc.
234BR - TRAINING ONLY - Classroom Req	514	Active	0	09/14/2011	Support	Dallas	No Region	68107	09/14/2011 11:18:30	Admin User	Dallas	Support		
248BR - Forestry	513	Active	1	09/14/2011	Support	Omaha	No Region	68107	09/14/2011 11:15:50	Support	Chicago	Support	NE Univ Nebraska Lincoln*	

3. If there are active campaigns they are displayed in the grid. If no campaigns are active, the grid will indicate No Campaigns Created.



└ CAMPAIGNS

CURRENTLY RUNNING CAMPAIGNS [FILTER BY GROUP](#) [SHOW ALL](#) [VIEW EXPIRED](#) [CAMPAIGN SEARCH](#) [ADD NEW](#)

No Campaigns Created

The buttons accompanying the campaign grid allow you to:

- **Filter By Group** – View currently running campaigns by group (region), i.e. Dallas, Atlanta
- **Show All** – Displays all events. Once this button is selected and the page refreshes, the button will change to Show Mine. [SHOW MINE](#) Select Show Mine to return to only your events.
- **View Expired** – Displays events that have taken place and have expired.
- **Campaign Search** – Search by a variety of criteria to locate particular kinds of events. This search function is similar to the Leads basic search functions.





- **Next, Last, Previous and First** – –Appear when there is more than one page of content displayed after an action. [NEXT](#) [LAST](#) [FIRST](#) [PREVIOUS](#)
- **Add New** – Allows you to create a new event/campaign.

The information displayed in the Campaigns screen provides a grid style overview. The name of the event, number of leads associated to an event location and other details can be seen. Blue hyperlinks, when clicked allow you to see additional details.

CAMPAIGNS															
CURRENTLY RUNNING CAMPAIGNS (PAGE 1 OF PAGE 1)															
Name	Id	Status	Leads	Start Date	Created By	City	State	Postal Code	Created On	Modified By	Group	Recruiter	School Name	Non-School Loc	
2348R - TRAINING ONLY - Classroom Req	514	Active	0	09/14/2011	Support	Dallas	No Region	68107	09/14/2011 11:18:30	Admin User	Dallas	Support			
2488R - Forestry	513	Active	1	09/14/2011	Support	Omaha	No Region	68107	09/14/2011 11:15:50	Support	Chicago	Support	NE Univ Nebraska Lincoln*		

Click the blue hyperlinks to access additional details.

Click the number to review leads associated with the event.

If there is more than one page of Campaigns, the **Next** and **Last** buttons will appear.

CURRENTLY RUNNING CAMPAIGNS (PAGE 1 OF PAGE 2)															
Campaign Name	Id	Status	Leads	Start Date	End Date	Created By	City	State/Region	Postal Code	Created On	Group	Recruiter	School Name	Non-School Loc	
Additional Info	725	Active	3	03/28/2012	03/28/2013	Admin User	Boston	Massachusetts (MA)		03/28/2012 04:49:50	Boston	Admin User			
Join Mt. Laurel Returned Volunteers for Dinner!	752	Active	0	04/23/2012	06/30/2012										RPCV location
Northampton 31st Test Campaign	769	Active	0	08/01/2012	08/01/2012										Parade Site
Atlanta Spring 2012	771	Inactive	0	06/24/2012	06/30/2012								FL Florida International Univ		
Attend an Application Workshop	772	Active	2	06/30/2012	06/30/2012								GA Morris Brown College		
General Information Session	776	Active	1	06/29/2012	06/29/2012								DC George Washington University		
In Class Infor Session	777	Active	0	09/14/2012	09/17/2012								NJ Princeton University		
Information Table	778	Active	0	07/05/2012	07/20/2012										YMCA
Launch your International Career with the Peace Corps!	779	Active	1	06/29/2012	06/29/2012								MA Clark University		



## Section 20.7: Creating a Campaign

1. Creating a Campaign from Scratch – Click the **Campaigns** tab on the Social Source Dashboard.



Note that toggling between “Show Mine” and “Show All” will display different campaigns. Make sure to select “Show Mine” to view just your campaigns.

2. Access the Create Campaign page by clicking Add New and the Create Campaign page will appear.

CURRENTLY RUNNING CAMPAIGNS (PAGE 1 OF PAGE 1)

Campaign Name	Id	Status	Leads	Start Date	End Date	Created By	City	State/Region	Postal Code	Created On	Group	Recruiter	School Name	Non-School Location	Event Type	Category
Additional Info	725	Active	0	03/28/2012	03/28/2013	Admin User	Boston			03/28/2012 04:49:50	Boston	Admin User				School
DC Event	345	Active	0	05/02/2011	05/02/2012	Missy Greene	Jacksonville	Florida (FL)	32082	05/02/2011 10:29:52	Atlanta	Missy Greene	FL Univ North Florida			School
General Information Session	751	Active	0	05/29/2012	05/29/2012	Robyn Mofswitz	Washington	District of Columbia (DC)	20052	04/23/2012 11:02:50	Mid-Atlantic	Robyn Mofswitz	DC George Washington University		Information Session	School
Information Table	694	Active	1	05/08/2012	05/08/2012	Robyn Mofswitz	Ithaca	New York (NY)		03/05/2012 05:25:17	New York	Jason Beach	NY Cornell University		Information Table	School
Join Mt. Laurel Returned Volunteers for Dinner!	752	Active	0	04/23/2012	06/30/2012	Robyn Mofswitz	Manhattan	New York (NY)	10001	04/23/2012 11:12:21	New York	Robyn Mofswitz		RPCV location	Social Event	Community

2. The **Create Campaign** page provides two kinds of fields. The first kind of field is used to input details of the event.

CREATE CAMPAIGN

BACK CREATE

Campaign Name*	
Apply URL	
Start Date*	06 / 02 / 2012
End Date*	06 / 02 / 2012
Event Time*	
Status*	Active
Category*	Select One
Event Type*	Select One
School Name	Select One
Non-School Location	
Room/Building	
Street Address	
Postal Code	
City*	
Country*	Select One
State/Region*	Select One
Group*	Select One
Recruiter*	Select One





3. Scroll down using the right scroll bar to view the Description WYISWYG editor and the rest of the fields involved in creating a campaign.

CREATE CAMPAIGN

Recruiter\* Select One

Sector\* Select One

Scarce Skill Event\* Select One

Registration for Event\* Select One

Description\*

**B I U** [List Icons] [Link Icon] [Image Icon] [Font family] Font size [Color Icon] [Image Icon]

If you've always wanted to challenge yourself on an international playing field while making a difference on a grassroots level, the Peace Corps wants you. Come learn about volunteer experiences, have your questions answered, and gain tips to guide you through the [application process](#).

**Saturday, June 2**  
**10:30 to 11:30 a.m.**  
University Branch Library  
5009 Roosevelt Way N.E.  
Seattle, WA 98105

Ready to Post\* Select One

Event Contact Name

Event Contact Phone Number

Event Contact Email

Partner Organization

Cost

Note: Fields marked with red asterisks are required to be completed (see graphic above).

4. The second kind of field—Total Attendance, Diverse Attendance, 50+ Attendance, RPCV Attendance, Worth Doing Again and Comments— found on the lower section of the campaign page, are used to enter information after the completion of the event. These fields allow tracking of attendance and the success of events.

Total Attendance	32
Diverse Attendance	4
50+ Attendance	6
RPCV Attendance	4
Worth Doing Again	Yes
Comments	Lots of Americorps graduates.
Created By	Obie Pressman
Created On	05/14/2012 07:05:15



## Campaign fields and how they're used

Fields	Description
Campaign Name	Name of the campaign as it will appear on the campaign page and on the Peace Corps events page.
Apply URL	For posting events in Twitter, Facebook and Linked. TBD on whether or not this function will be used by Peace Corps.
Start Date	Determines order of appearance on the Peace Corps events page.
End Date	Only campaigns with end dates on or before today's date will appear on the Peace Corps events page.
Event Time	When the event starts until when it ends.
Status	Only campaigns with "Active" status will appear in your or the general list of active campaigns. "Active" or "Inactive" status will not affect whether or not a campaign is posted to the Peace Corps events page (see Ready to Post). Once a campaign has been posted to the Peace Corps events page NEVER select "Delete" under status, as this will delete the campaign from Social Source, but not from the Peace Corps Web page.
Category	Select the category of the event: school, community, online, etc.
Event Type	Select the type of event: career fair, information session, etc...
School Location	If event is being held at a school select the school from the drop down menu.
Non-School Location	If the event is not being held at school give the name of the location.
Room/Building	The room number and building where the event is being held.
Street Address	Give the street address for non-school locations.
Postal Code	Filling in the postal code will auto-fill the city.
City	City where event is being held.
Country	Country is required to determine State/Region.
State/Region	In Social Source state is the same as region.
Group	The regional office in charge of the event, e.g. Seattle, Dallas or Chicago.
Recruiter	The recruiter associated with the event.
Sector	Used for tracking and reporting purposes. Select one of the 6 Program Sectors—Agriculture, Education, Community Economic Development, Environment, Health or Youth in Development—or if it's not sector specific select "General."
Scarce Skill Event	"Yes" or "No" depending upon if the event is directed at a scarce skill audience.
Registration for Event	Selecting "Yes" will create a link on the campaign's Peace Corps events page that will take interested leads to a registration page that will collect their basic contact



	information. Registered leads will remain associated with the event and will be searchable.
Description (WYSIWYG)	This where the description of the event is entered. Text can either be edited using the WYSIWYG features provided, or can be copied and pasted from text created in MS Word. Embedded formatting such as bolding and hyper links will be kept intact and carried over when posted to the Peace Corps events page.
Ready to Post	Only campaigns with a “Yes” status will be posted to the Peace Corps events page. If you are not ready to post a campaign yet select the “No” status. At a later date you can go back and select “Yes” and it will post. Once you have posted a campaign to the Peace Corps events page you cannot unpost it by selecting “No”. If you need to remove an already posted event you must change the “End Date” to a day that has already passed.
Event Contact Name	Any third party contact who has helped with the event, e.g. a librarian, career services admin, etc.
Event Contact Phone Number	Phone numbers for any third party contacts.
Event Contact Email	Email for any third party contact.
Partner Organization	Any organizations that have partnered on the event, e.g. Americorps, Teach For America, etc.
Cost	The cost of the event can be recorded for future reference.
Total Attendance	Filled in after the event by the recruiter in charge of organizing it.
Diverse Attendance	Filled in after the event by the recruiter in charge of organizing it.
50+ Attendance	Filled in after the event by the recruiter in charge of organizing it.
RPCV Attendance	Filled in after the event by the recruiter in charge of organizing it.
Worth Doing Again	“Yes” or “No” options can influence future decisions to hold the same event again.
Comments	Any comments worth noting about the event that will help future recruiters.
Created By	This is auto-filled
Created On	This is auto-filled

5. Once all the required and desired optional fields are filled, click the **Create** button.

CREATE CAMPAIGN BACK CREATE

6. The campaign that is being created will integrate with the Peace Corps website and be posted on the events page. Postings are updated once an hour, thus it may take up to an hour for new campaigns or campaign edits to display on the Peace Corps website.



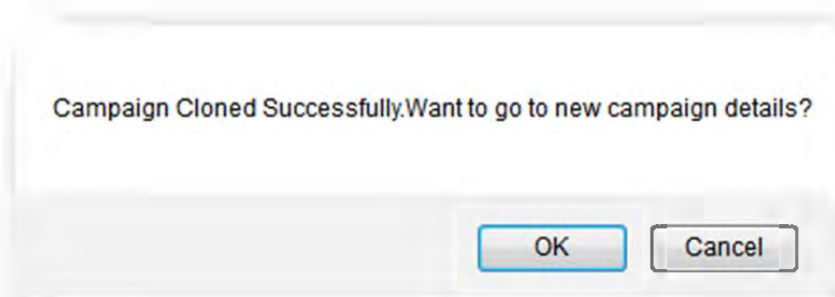
## Creating a Campaign by Cloning

1. If you'd like to create a new campaign based upon an already existing campaign you can do so by using the **Clone** function.
2. Select the campaign you want to **Clone** from the campaigns list. Any campaign can be cloned, it can be yours or another persons, and either active or inactive.

The screenshot shows a web interface for managing campaigns. At the top, there's a header with the word 'CAMPAIGNS' and social media icons for Twitter, Facebook, and LinkedIn. Below this is a 'CAMPAIGN DETAILS' section. On the right side of this section, there are three buttons: 'BACK', 'CLONE' (highlighted with a red box), and 'UPDATE'. The main area contains a form with various fields for campaign information:

Field	Value
Campaign Name*	Join Mt. Laurel Returned Volunteers for Dinner!
Apply URL	
Start Date*	04 / 23 / 2012
End Date*	06 / 30 / 2012
Event Time*	6:00 pm - 8:00 pm
Status*	Active
Category*	Community
Event Type*	Social Event
School Name	Select One
Non-School Location	RPCV location
Room/Building	
Street Address	
Postal Code	10001
City*	Manhattan
Country*	USA
State/Region*	New York (NY)
Group*	New York
Recruiter*	Mofsowitz Robyn

3. Once you've entered the campaign details page click the "Clone" button on the right hand side and then select OK.



4. Once you are brought to the cloned campaign details page change the name of the campaign and any other pertinent details and then click the **Create** button to post it to the Peace Corps events page. Once again, it may take up to one hour for it to be posted.



## Section 20.8: Distribution Lists

Distribution lists are the saved results of lead searches. A distribution list is used when sending email blasts about specific campaigns or events.




Prior to creating and sending blasts you must create or use an existing distribution list to accompany the message.

### To create a distribution list:

1. Use the left toolbar and click Distribution List.
2. Click **Search Leads** (refer back to Section 20.4: Searching Leads for complete instructions on how to search for leads). You will search for leads to add to a distribution list. For example you can perform a basic search for candidates living in Dallas, Texas.

Note: Anytime you search for leads you can turn the results into a distribution list.

3. In either the Basic Search area or the Advanced Search area, select search criteria from the drop down menu. The  button allows you to add additional search criteria fields to the search you're performing.

4. Define how the search criteria will be applied by selecting from the drop down menu for the "contains" field.





- When performing a Basic Search, type the corresponding information into the field to the right of the “contains” field. Selecting the Submit button runs your search which returns a list of leads that match your search criteria.

- When the results are returned if you only want certain leads as part of the list you can select them by using the checkboxes along the left hand side of the grid. If you find you want to select most of them you can use the “check all” box at the top of the list and then de-check the few leads you don’t want to use. Performing a good search will prevent you from needing to use the checkboxes at all.

- If you want to use the entire returned list of leads for your distribution list, from the Actions field drop down menu select Save as List – ALL. If you only want to use the leads you checked then from the Actions field drop down menu select Save as List – CHECKED. Then click the **Update** button.



“Save as List – ALL” distribution lists are dynamic by default. “Save as List – CHECKED” distribution lists are static by default. To allow for leads to continue to be sorted based on a criteria, select the “Save as List – ALL” option. To have a distribution list that only consist of the leads that were specifically selected, select the “Save as List – CHECKED” option.





- The system will navigate to the Save Distribution List page. On the page you will need to name your list by entering in the name of the list in the Name field. Then click the **Save** button.

NAME YOUR LIST	
Total Leads	20
Total Opted In	20
Total Opted Out	0
Name	Dallas TX Distribution List - Sample

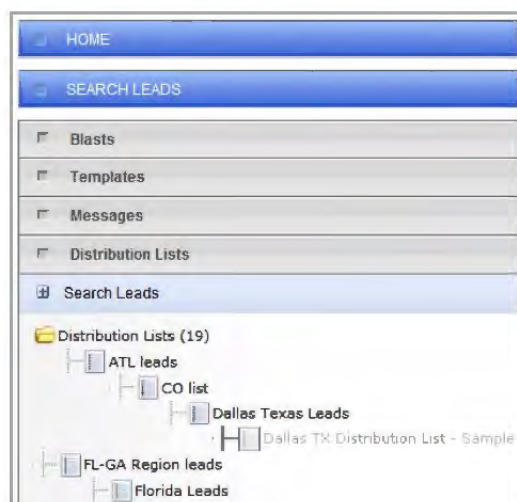
- The system will show the Distribution List Detail page.

DETAILS FOR DALLAS TX DISTRIBUTION LIST - SAMPLE	
Date Created	04/16/2012 6:21 PM
Created By	John Doe10
Status	Inactive
Name	Dallas TX Distribution List - Sample

BLASTS USING THIS LIST

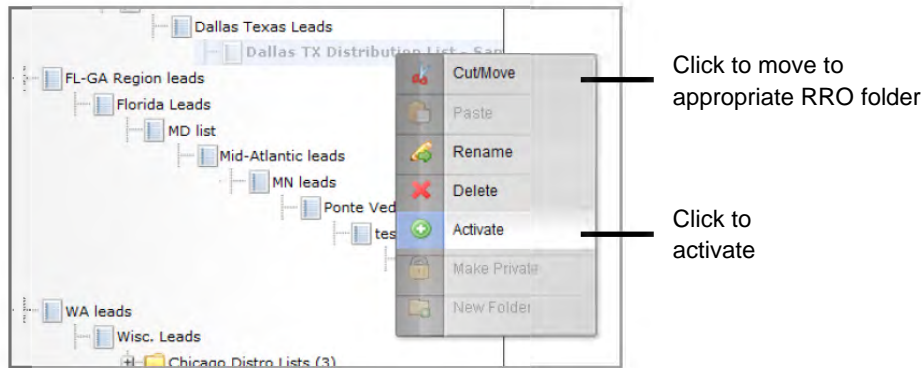
None

- The newly created distribution list displays in the toolbar on the left hand side of the screen and will be greyed-out. This indicates the list is created, but not yet activated.





11. **Right click** on the newly created list and select **Activate** in the dropdown menu that appears.
12. The distribution lists do not automatically generate in the correct RRO folder Right click the activated distribution list select Cut/Move from the dropdown menu, then select the appropriate RRO folder, right click and select Paste from the dropdown menu. .



Moving a distribution list into the correct RRO folder will reduce clutter and make using distribution lists easier for everybody. However, just because a distribution list is not saved in your RRO folder doesn't mean you can't access or use it.

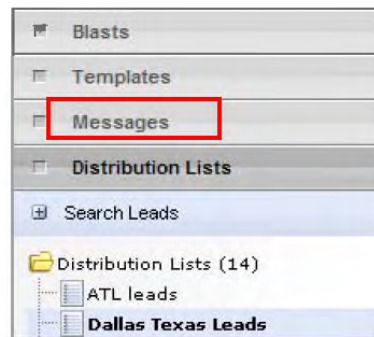


## Section 20.9: Creating Messages

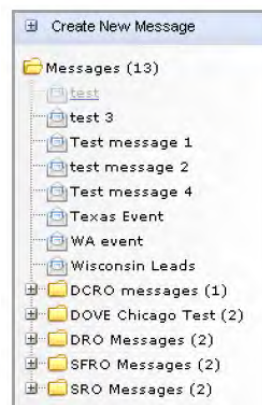
Once the distribution list has been created, it is necessary to create the message that will go to the Leads.

### To create a message:

1. Ensure the distribution list is highlighted. This means that the distribution list is activated.
2. Click **Messages** in the action panel.




3. The **Create New Message** panel opens. Click **Create New Message**.



4. The **Select Template To Use** page displays. Select the appropriate **template** to be used for the message. (See template section to learn how to create new templates.).



5. Click **Create**. 
6. The template is displayed. Some templates will be configurable, while others will not depending upon how the template is meant to be used.

7. With the message template displayed, complete the following fields:
  - Message Name – Assign a name to your message, this is not displayed in the email.
  - Message Subject – This subject line displays in the email subject line.
  - Campaign – Associate the message to a campaign. Use the drop-down arrow to locate the applicable campaign. You do not need to select a campaign for all messages.
  - Reply To – Enter your email address or the Regional Recruiter Office email address. If no email address is entered, the recipient cannot reply.
  - To change information within the message, place the cursor in the area to be changed, the text editor will display and can be used to assist in making changes such as, changing the date of the event, adding a location, bolding text or conducting a spell check.



8. Once the message has been created, click **Preview** to see how it appears to the recipient. You will need to preview in both HTML and Text view.

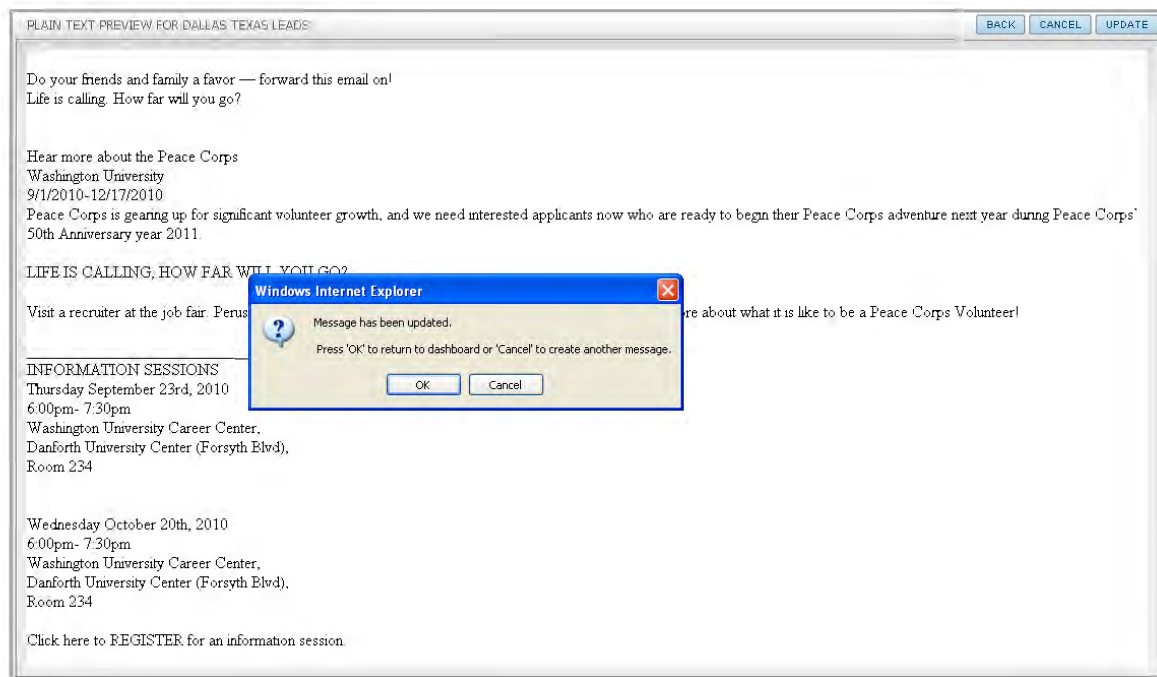
You have the option of sending a Test Email to yourself to see how the message appears in email format. Enter up to three email addresses in the email fields and click the **Test Email** button to receive and preview the message.

9. With the message reviewed and completed, click **Save**.

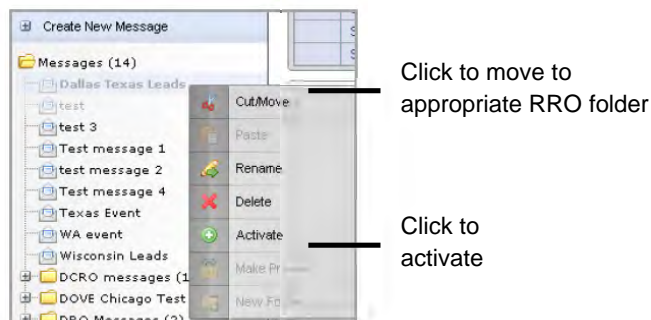
10. A confirmation messages displays, indicating the message is analyzed for spam. Click **OK**.
11. An additional pop-up message displays indicating the message will be displayed in Plain Text version. Click **OK**. The message will be displayed in the plain text format.
12. Click **Preview**.
13. Click **Update**.



14. A message displays indicating the Message has been updated. Click **OK**.



15. The page refreshes and displays the Social Source homepage. The new message appears in the left hand toolbar in the Message folder under Create New Message and needs to be activated. Right click on the message and select **Activate** from the dropdown menu. To move the message into an RRO folder right click it, select Cut/Move from the dropdown menu, and then select the appropriate RRO folder, right click and select Paste from the dropdown menu.



16. The message is now ready to be sent via a Blast.





## Section 20.10: Creating Blasts

1. From the Social Source left toolbar, click the **Blasts** tab.

Kenexa 2X BrassRing Social Source

HOME | **CREATE NEW EMAIL BLAST**

ADD A LEAD | SEARCH LEADS

**Blasts**

- Create New Blast
- Blasts
  - Cancelled (9)
  - Scheduled: Once (0)
  - Scheduled: Recurring (4)
  - Sent (4)

NAME YOUR EMAIL BLAST

Blast Name

SELECT MESSAGE

Message Select One

SELECT DISTRIBUTION LIST

Distribution List Select One

SCHEDULE YOUR EMAIL BLAST

Note: Blasts are sent in 15 minute increments. Schedules are converted to Eastern Time.

Next Blast Date 06 / 28 / 2012

Next Blast Time 4:00 PM

Time Zone EDT, Eastern Daylight Time GMT-4:00

Repeat Type --

Interval 0

Exclusions Include all leads

Stop After Occurrences 0

SCHEDULE

2. Click **Create New Blast**.

**Blasts**

**Create New Blast**

Blasts

- Cancelled (9)
- Scheduled: Once (0)
- Scheduled: Recurring (4)
- Sent (4)

3. The **Create New Blast** page is displayed. Click **Create Email Blast**. (Social Source is capable of sending SMS blasts as well, but Peace Corps does not currently use this feature.)

CREATE NEW BLAST

EMAIL

[Create Email Blast](#)



4. The Email Blast screen displays.

- Blast Name – Enter a name for the blast
- Select Message – Use the drop-down arrow and select the message you have created (only messages that have been Activated will display)
- Distribution List – Use the drop – down arrow and select your distribution list (only distribution lists that have been Activated will display)
- Schedule Your Email Blast – Use this section to schedule exactly when the email blast is to be sent out.
- Use the Repeat Type, Interval, Exclusion and Stop After Occurrences to determine how often and who will receive the blast and when the blast will end.

**Note:** Interval refers to the Repeat Type field and how often the blast is sent out. Thus, if the Repeat Type was set at Weekly and 3 was entered for the Interval, then the blast would be sent out once every 3 weeks.



- Once the email blast has been created, click the **Schedule** button.

CREATE NEW EMAIL BLAST

NAME YOUR EMAIL BLAST

Blast Name

SELECT MESSAGE

Message Select One

SELECT DISTRIBUTION LIST

Distribution List Select One

SCHEDULE YOUR EMAIL BLAST

Note: Blasts are sent in 15 minute increments. Schedules are converted to Eastern Time.

Next Blast Date 06 / 28 / 2012

Next Blast Time 4:00 PM

Time Zone EDT, Eastern Daylight Time GMT-4:00

Repeat Type --

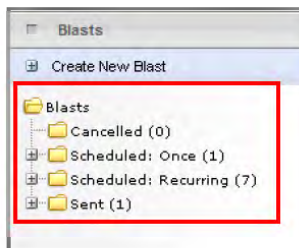
Interval 0

Exclusions Include all leads

Stop After Occurrences 0

SCHEDULE

- The Email Blast then automatically moves to the left-hand side into the appropriate folder.



- After a blast is created, you can go back to the blast and edit it by selecting it from the appropriate folder.

HOME

ADD A LEAD

SEARCH LEADS

Blasts

Create New Blast

Blasts

Cancelled (9)

Scheduled: Once (0)

Scheduled: Recurring (4)

Test Blast 1

Test Blast 2

Test Blast 5.21.12

Sent (4)

BLAST DETAIL

DETAILS FOR OBIE'S TEST BLAST 1

BACK EDIT DELETE

Blast Type EMAIL

Scheduled For 08/01/12 3:00 PM EDT

Blast Status Active

Date Created 05/15/2012 7:25 PM

Created By

Distribution List Seattle Leads

Message Name Test 1

Last Sent 05/23/12 3:00 PM EDT

Recurring Every 10 Week

Cancelled Cancel this email/sms

Explore Leads Click to explore leads



- From the **Blast Detail** page you can select editing options by clicking the Edit button, or you can cancel the blast by clicking the “Cancel this email/sms” link in the Cancelled field.

HOME

ADD A LEAD

SEARCH LEADS

Blasts

Create New Blast

Blasts

- Cancelled (9)
- Scheduled: Once (0)
- Scheduled: Recurring (4)
- Test Blast 1
- Test Blast 2
- Test Blast 5.21.12

Sent (4)

Templates

Messages

Distribution Lists

BLAST DETAIL

DETAILS FOR OBIE'S TEST BLAST 1

BACK EDIT DELETE

Blast Type	EMAIL
Scheduled For	08/01/12 3:00 PM EDT
Blast Status	Active
Date Created	05/15/2012 7:25 PM
Created By	
Distribution List	Seattle Leads
Message Name	Test 1
Last Sent	05/23/12 3:00 PM EDT
Recurring	Every 10 Week
Cancelled	Cancel this email/sms
Explore Leads	Click to explore leads

PREVIEW FOR TEST BLAST 1

Life is calling.  
How far will you go?

Do your friends and family a favor —  
forward this email on!

Life is calling. How far will you go?

to your morning commute.

Since 1961, the Peace Corps has shared with the world America's most precious resource its people. Peace Corps Volunteers serve in 76 countries in Africa, Asia, the Caribbean, Central and South America, Europe, and the Middle East. Collaborating with local community members, Volunteers work in areas like education, youth outreach and community development, the environment, and information technology.

Coming from all walks of life and representing the rich diversity of the American people, Volunteers

Blast Detail Page and Options.

EDIT EMAIL BLAST

NAME YOUR EMAIL BLAST

Blast Name

Test Blast 1

SELECT MESSAGE

Message

Test 1

EDIT MESSAGE

SELECT DISTRIBUTION LIST

Distribution List

Seattle Leads

EDIT LIST

SCHEDULE YOUR EMAIL BLAST

CANCEL CHANGES UPDATE

Note: Blasts are sent in 15 minute increments. Schedules are converted to Eastern Time.

Next Blast Date	08 / 01 / 2012
Next Blast Time	03:00 PM
Time Zone	EDT, Eastern Daylight Time GMT-4:00
Repeat Type	Weekly
Interval	10
Exclusions	Exclude leads who have already received this blast
Stop After Occurrences	30

Edit E-mail Blast Page and Options

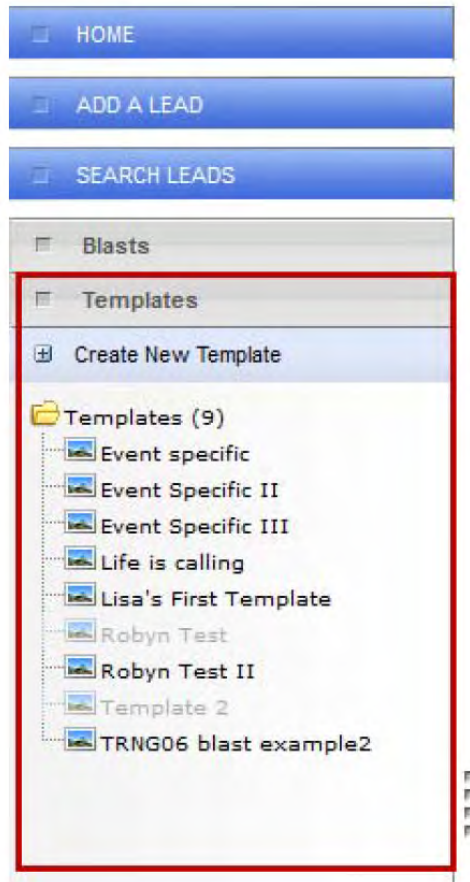


Any changes that are made to the blast are going to take effect with the next scheduled time that the blast will run.

## 20.11 Creating Templates

Templates are created by DOVE System Administrators.

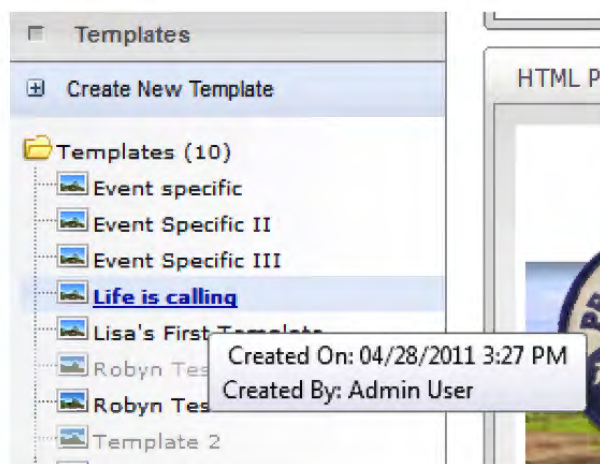
Templates are located from within Templates feature and they populate the blasts that are sent from Social Source.







Hovering over a Template, you can see template details like created on and created by:



### Sample Template:

TEMPLATE DETAIL

DETAILS FOR LIFE IS CALLING

CLONE


EDIT

DELETE

Date Created	04/28/2011 3:27 PM
Created By	Admin User
Status	Active

HTML PREVIEW FOR LIFE IS CALLING

3:27 PM



Life is calling.

How far will you go?

Do your friends and family a favor — forward this email on!

[Life is calling. How far will you go?](#)

Since 1961, the Peace Corps has shared with the world America's most precious resource its people. Peace Corps Volunteers serve in 76 countries in Africa, Asia, the Caribbean, Central and South America, Europe, and the Middle East. Collaborating with local community members, Volunteers work in areas like education, youth outreach and community development, the environment, and information technology.

Coming from all walks of life and representing the rich diversity of the American people, Volunteers range in age from college students to retirees. Every Peace Corps Volunteer's experience is different. From teaching English to elementary school children in Zambia to launching a computer learning center in Moldova to promoting HIV/AIDS awareness in South Africa to working on soil conservation in Panama, Volunteers bring their skills and life experiences to where they are needed most.

>> Apply Now





## Template Details:

- A System Admin will be able to edit for you the content, graphic, status (active/inactive), etc.
- Like Campaigns, the options of Clone, Edit, and Delete exist for templates, however, general users cannot access these options.
- Contact your system admin if you want a Template – cloned, edited, or deleted.

**TEMPLATE DETAIL**

DETAILS FOR LIFE IS CALLING

Date Created	04/28/2011 3:27 PM
Created By	Admin User
Status	Active

CLONE EDIT DELETE

HTML PREVIEW FOR LIFE IS CALLING

## 20.12: Reporting

### Reporting

### Custom Reports



## Section 20.13: Social Source Contents Library

While working in Social Source, you have the ability to retrieve and view stored content. The Contents Library stores, links, videos and documents that can be linked to in email messages you are sending.

### To access the Contents Library:

1. From the dashboard, click the **Content** tab.



2. To locate approved content that can be used within an email blast, click on **Search**. Enter Search criteria in the same manner as searching leads and campaigns.
3. Click the **Submit** button. Results for the content type being searched will display.

### Test Your Knowledge

Answer the following questions “True or False”?

1. Campaigns are created and email blasted to leads.
2. You can manually create leads within Social Source.
3. Email blasts can be set up to be recurring.



## Chapter 21: 2xOnboarding (2xO)

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### 21.1: What is 2xO?

2xOnboarding (2xO) is a supplemental web-based application affiliated with DOVE (2xB). It allows **DOVE candidates (referred to as applicants in 2xO)** and **Peace Corps staff (hereinafter referred to as users)** to communicate; complete activities and tasks to prepare applicants for Staging; and to track applicants' progress. 2xO will **only** be initiated by users for applicants once applicants are at the HR Status of Invitation Accepted.

2xO is used by Regions to initiate the OnboardingOnbaording Process for applicantsApplicants<sup>1</sup> and by applicantsapplicants to complete activities and forms in the New Hire Portal (the applicants' access to 2xO). Placement and Staging need to be aware of the capabilities and limitations of 2xO to help respond to Applicant's questions.

In addition, 2xO provides country-specific content to applicants, as well as, information concerning cultural awareness, safety and security, and more.

This chapter focuses on the following aspects of 2xO:

- Accessing 2xO in DOVE (for users<sup>2</sup>)
- Helping Applicants Access 2xO (the "New Hire Portal")
- Monitoring Applicants in a Job<sup>3</sup>
- Processing Applicant Activities and Tasks
- Other actions in 2xO

### 21.2: 2xO Best Practices

#### System Best Practices:

- (1) Web Browser: Internet Explorer 7.0 or 8.0 are most compatible with 2xO.
- (2) Computer: The user's system should comply with the minimum CPU and RAM requirements as stipulated by the user's respective web browser.
- (3) Display: Resolution settings of 1,024 x 768 and higher are ideal when using 2xO. Lower resolutions are operational with horizontal and/or vertical strolling.

#### Peace Corps Best Practices:

- (1) Although Peace Corps users 2xO can see and access applicantsapplicants' activities and tasks, **it is critical NOT to complete them for an Applicant**. After completing the second OnboardingOnboarding task, Country Desk Unit (CDU) users will be able to begin completing activities on behalf of the Applicant. **Applicant activities are indicated by red instructional text written as directives for the Applicant.**

- (2) The Global Toolbar in 2xO cannot be modified for the Peace Corps independently of all of the software vendor's other clients. As a result, titles and headings will have different meanings for Peace Corps users than standard implementations of 2xO for other clients' personnel. For example, "Jobs" in 2xO refers to tasks. "Hired" in 2xO means that an applicant is

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<sup>1</sup> Recall that DOVE applicants are referred to as "Applicants" in 2xOnboarding.

<sup>2</sup> Recall that users refers to Peace Corps users that use the system.

<sup>3</sup> Jobs are automatically created in 2xO based upon TCRs in DOVE. Jobs are identified by a Job Number that matches the TCR Auto req ID.




at the HR Status of Invitation Accepted in DOVE. (See section 21.5 Navigating 2xO for more information.)

If contact information is updated in 2xO, the user must reflexively update the information in DOVE. Applicant contact information from DOVE automatically updates information in 2xO; however, applicant **information entered in 2xO does not** automatically update **DOVE**.



### 21.3: Onboarding Process

Users should be aware of the Onboarding Process on the whole before beginning to taking actions in 2xO. Users should be familiar with the Applicant Processing Map below.

The green  decision point indicates **where the Onboarding Process begins**.

1. The information from each Applicant<sup>4</sup> in a TCR is added to 2xO.
2. Staging monitors applicants to be sure that invitation accepted Applicants in their TCRs have been added to 2xO into the correct Jobs.
3. Regions (CDUs) review their Jobs (reqs/assigned TCRs) and makes sure their information (i.e., CDU phone number) is current.
4. Once an Applicant is at HR Status Invitation Accepted they receive an email with a link to 2xO and their temporary login information. Applicants must create their permanent login information.
5. Staging monitors applicants to track which are on-target to complete the appropriate forms by the Staging date.
6. Applicants complete assigned activities and forms in the 2xO New Hire Portal<sup>5</sup>.
7. Staging tracks and monitors their applicants' statuses and percent of activities and forms completed.
8. Regions are the only user type that initiates tasks or loops back (resets) the activities and forms.
9. All activities and forms are completed online, except for the Eligibility Verification (EV) form. Applicants must complete the EV form in 2xO, but print and bring it to Staging to sign it in-person during registration.
10. Applicant brings Eligibility Verification (EV) form to staging to sign it in-person during registration.
11. Staging collects EV form at Staging.
12. Applicant departs for their assigned training location (Host Country).

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<sup>4</sup> Recall that 2xO applicants are called candidates in DOVE.

<sup>5</sup> Recall that the New Hire Portal is the pages of 2xO that applicants(aka., DOVE candidates) work within.

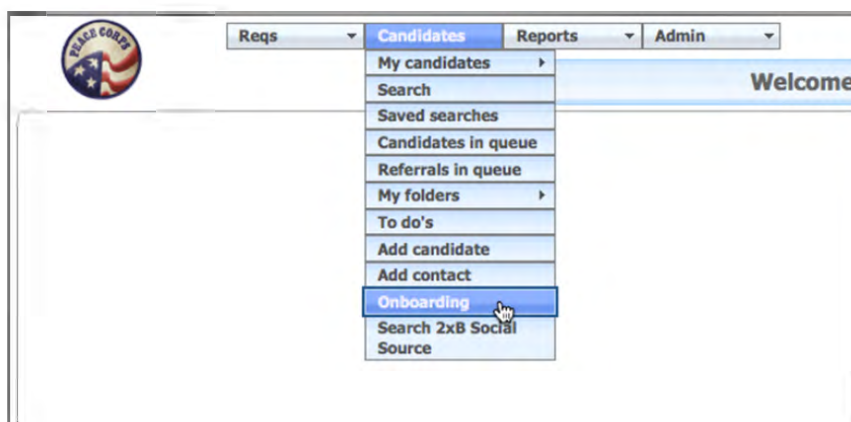


Placement and Staging help respond to Applicant's questions so they must be familiar with 2xO, especially the New Hire Portal. However, once their applicants are at the HR Status of Invitation Accepted, ownership of the applicants in 2xO is transitioned to the CDU.

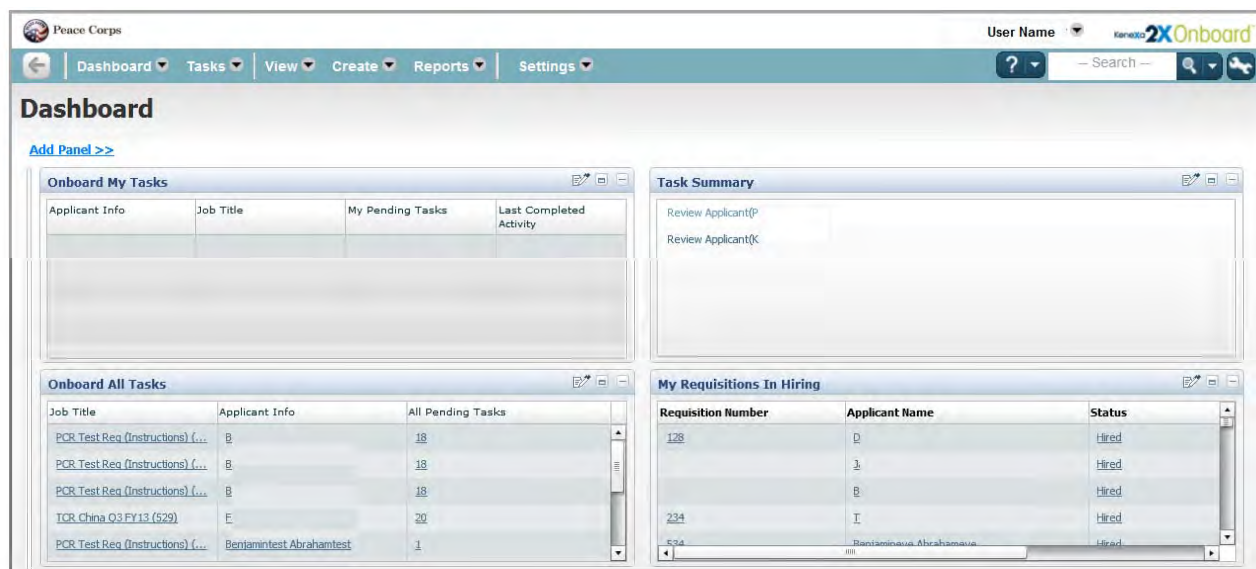
## 21.4: Accessing 2xO

### 21.4.1: Candidates Tab in DOVE

Once logged into DOVE, locate the Candidates Tab, in the Top Toolbar. In the Candidates Tab from the dropdown menu, users will see **Onboarding**. Select the **Onboarding** option to enter 2xO.



Below shows a standard view most users will see upon selecting **Onboarding** from the Candidates Tab in DOVE.







### 21.4.2: 2xO Login Page

When logging into 2xO, it will automatically launch from the Candidates Tab. However, 2xO will time out if inactive for too long. When 2xO times out you will be presented with the Login screen below, however, You cannot log back into 2xO using the login screen below because Peace Corps is using single-sign-on with all DOVE applications. **If 2xO times out, simply close the 2xO window and go back to the Candidates Tab in DOVE and reopen Onboarding.**



2xO will prompt you when you have 5 minutes left before it times out. The picture below is for reference only. Follow instructions above to return to 2xO.

A screenshot of the 2xO login page. At the top, there is a Peace Corps logo and the text "Peace Corps". Below this, a red message states: "You are logged out of the system. Please log back in with your username and password". The main login area is a blue box with the "KeneXa 2X" logo in the top right corner. It contains two input fields: "Username" and "Password", both of which are highlighted with a red rectangular border. Below the password field is a link that says "Forgot your username or password?". At the bottom of the login box is a blue "Login" button, also highlighted with a red rectangular border. Below the button are two links: "Help" and "Contact Administrator".



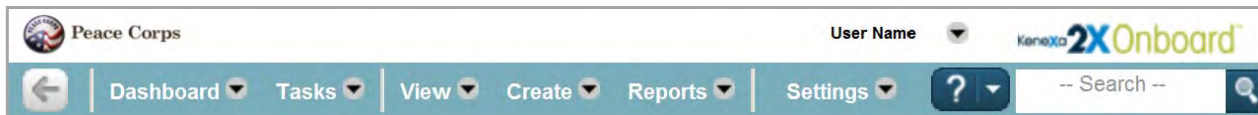


## 21.5: Navigating within 2xO (Peace Corps Users' portal)



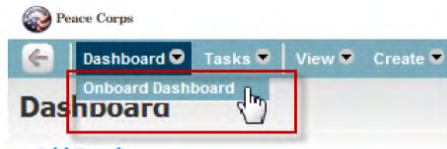

Users will access 2xO from DOVE. The panels and functions of 2xO can only be accessed within 2xO<sup>6</sup>. Regions, Placement and Staging will most often use the Tasks and View options from the Global Toolbar.

### 21.5.1: Global Toolbar

At the top of almost every page in 2xO you will see the Global Toolbar. This serves as the central point for navigation within 2xO. This section of the chapter will focus on the options in the 2xO Global Toolbar.





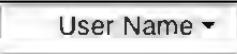

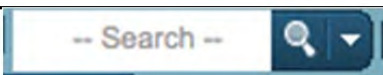



This table provides a description of each option in the **Global Toolbar**.

Global Toolbar Option	Description
	Selecting this button brings the user back to the screen from which the request was initiated.
	Selecting Onboard Dashboard from the dropdown menu returns the user back to the Onboard Dashboard. 
	This displays two options: tasks and approvals.  <b>Tasks</b> shows the number of pending tasks. The number in parenthesis shows the number of pending tasks. A task is an action to complete based on an applicant's activity or based on the workflow (e.g., completing each of the two activities required to initiate Onboarding for an applicant).  <b>The Peace Corps <u>does not</u> use the Approvals option in the Tasks dropdown menu.</b>

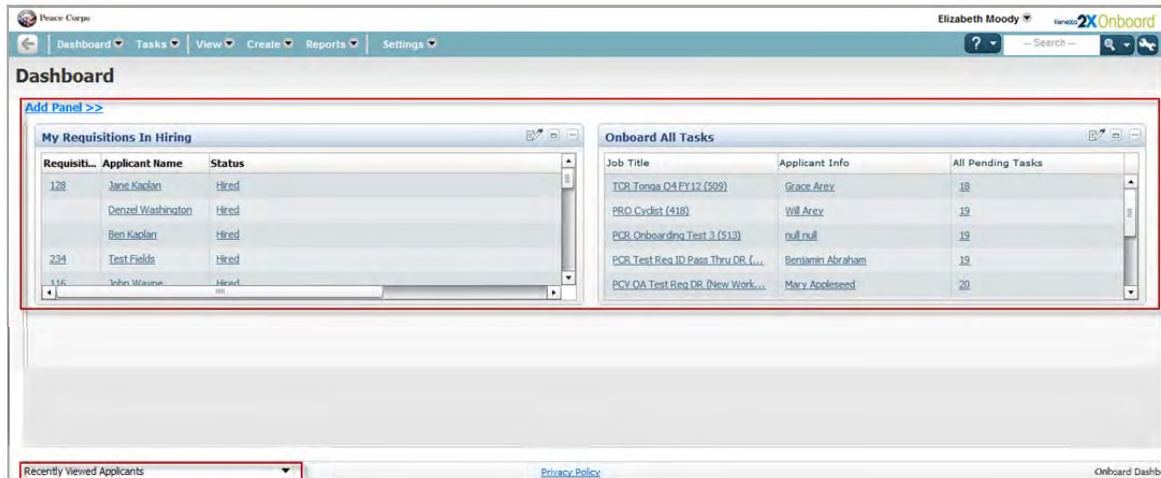
<sup>6</sup> This contrasts with Social Source for which users can access some features while still in DOVE via a DOVE Dashboard panel.



Global Toolbar Option	Description
	<p><b>View</b> allows users to view Jobs and applicants that automatically populated into 2xO when the Applicant accepted their invitation. View displays two options: Jobs and Hotlist Applicants.</p> <p><b>Jobs</b> refers to the Jobs (reqs) the user is responsible for. <b>Hotlist Applicants</b> is a way for users to give applicants a designation that sets them apart from other applicants in a particular Job. This is similar to using folders to organize these particular applicants so that they stand out in some way.</p>
	<p>The <b>Create</b> tab <u>will not be used</u> at this time because Jobs (i.e., TCRs) and applicants automatically populate into 2xO from DOVE. Users should instead access Jobs and applicants via the “View” option.</p>
	<p>The <b>Reports</b> tab allows Peace Corps users to run Standard Reports or My Reports. My Reports are custom reports based on Standard Reports.</p>
	<p><b>Settings:</b> This option allows users, VDS Analysts and System Administrators to view and update their settings.</p> <p><b>Users</b> can update their personal settings. <b>Administrators</b> can access system-wide settings.</p>
	<p><b>User Name tab:</b> It allows users to logout of 2xO. This dropdown will state the user’s name and is located above the search box.</p>
	<p><b>Help:</b> Clicking the question mark opens the vendor-based help information and an FAQ.</p> <p><b>Contact us:</b> Selecting this option displays the system vendor’s product support information (phone number, etc).</p>
	<p><b>Searching:</b> There are several search options in 2xO – quick search, applicant profile, Job definition, last search, and Applicant Advance Search. Searches are a means for finding specific applicants or Jobs. Users will primarily perform quick searches for candidates and Job Definition searches for Job details</p>
	<p><b>Global Toolbar Settings:</b> This is the toolbar settings button. The system defaults to showing all toolbar options. Removing options should only be done by a System Administrator.</p>



## 21.5.2: Onboard Dashboard



Upon launching 2xO, users will view the Onboard Dashboard. The Onboard Dashboard is comprised of several panels. Users can add, remove, and refresh these panels. (*More information on the panels in Section 21.7.2: Monitoring Applicant Activities*).

The available panels include:

1. Onboard All Tasks
2. Onboard My Tasks
3. My Requisitions In Hiring
4. Hiring Summary
5. Task Summary
6. Onboard New Hire List
7. Report 1 [This is blank in my user type. How will this be used? Pending Dawn Question]

All panels will be accessible by users. Panels populate information based on TCR information in DOVE, including tasks assigned to users identified on the req team. The default is for all seven of the above panels to be visible. Users can customize their view by adding or removing panels (instructions below).



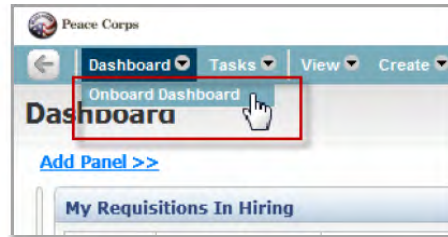
Note that the bottom of the screen shows Recently Viewed Applicants. (Another way of monitoring user activity.)



Selecting the arrow displays a drop down menu of Recently Viewed Applicants. You can click The name of an individual applicant to go directly to that applicant in 2xO.



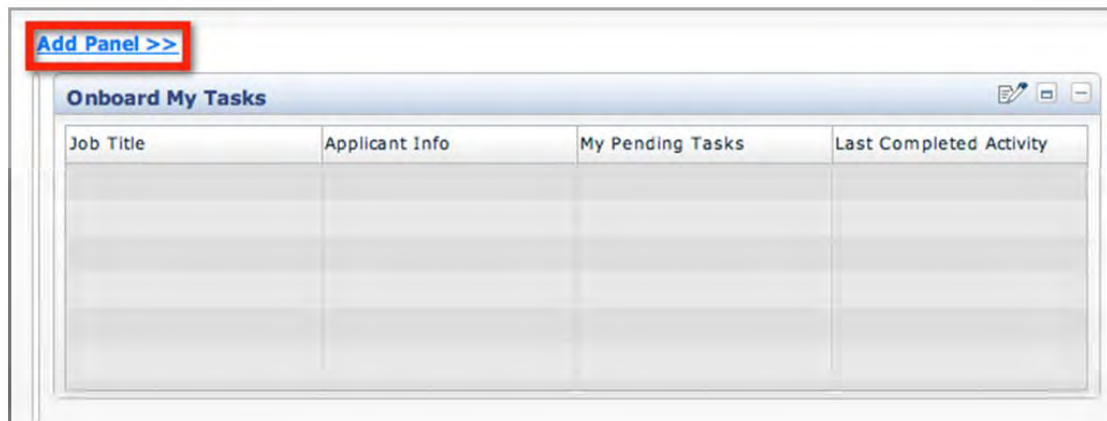
Users can refresh the Onboard Dashboard by selecting it from the **Global Toolbar** (see below).



### To add/remove a panel:

*Adding a panel is easy in 2xO.*

1. Select the [Add Panel >>](#) hyperlink just above the panels.



2. **Chose** the panel you want from the list. The “select a panel to add” closes on its own within a short timeframe if no new panel is selected. Select [Add Panel >>](#) to reopen the options.



3. **Select** the chosen panel's hyperlink.





**Select a panel to add**  
[Hiring summary](#)  
**[Task Summary](#)**  
[Onboard New Hire List](#)

**Onboard My Tasks**

Job Title	Applicant Info	My Pending Tasks	Last Completed Activity
-----------	----------------	------------------	-------------------------

4. The new panel will appear in the **Onboard Dashboard**.

**Dashboard**  
[Add Panel >>](#)

**Onboard My Tasks**

Job Title	Applicant Info	My Pending Tasks	Last Completed Activity
-----------	----------------	------------------	-------------------------

**My Requisitions In Hiring**

Requisiti...	Job Title	Applican...	Status
116	QA En...	John...	Hired
128	PCR T...	Jane K...	Hired
		Denzel...	Hired
		Ben Ka...	Hired
224	Patrol	Trent E...	Hired

**Onboard All Tasks**

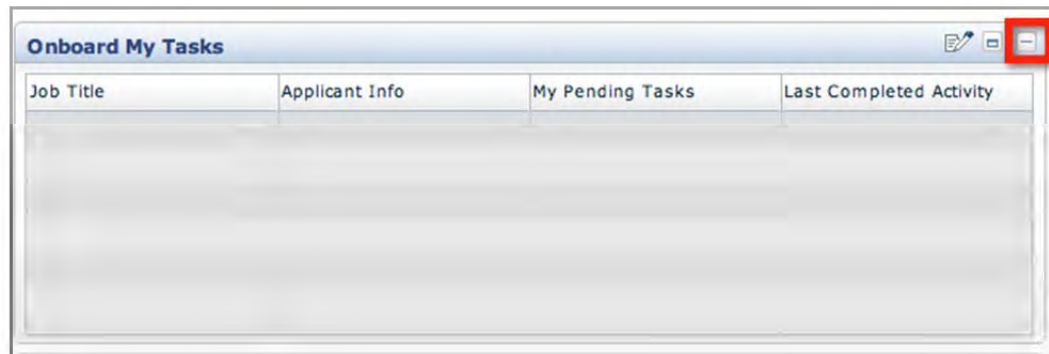
Job Title	Applicant Info	All Pending Tasks
-----------	----------------	-------------------


**Task Summary**  
[Review Applicant](#)



*Removing a panel involves:*

1. In the top right corner of an individual panel, you will see the minus sign  icon.



2. Select the  to remove the panel. The panel is removed immediately. To restore a panel, follow the steps for adding a panel.

*To refresh a panel to see current information:*


1. Hover over the Dashboard and display the Onboard Dashboard.
2. Select the Onboard Dashboard tab and the panels will refresh.



3. Alternately, you can click on the present panel or dashboard and strike the F5 key to refresh a page.

### **To edit a panel:**

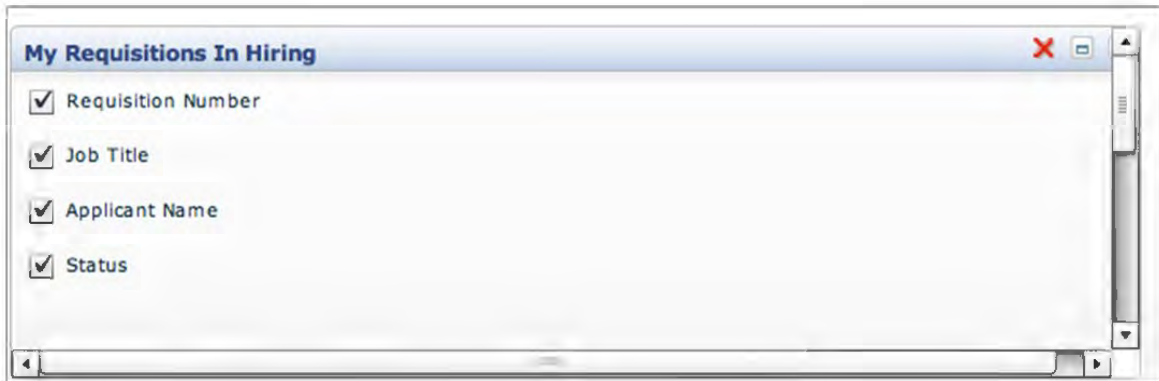
All panels allow some degree of editing of fields or visible information.


1. To edit the panel, select the edit  icon from the top right corner of an individual panel.

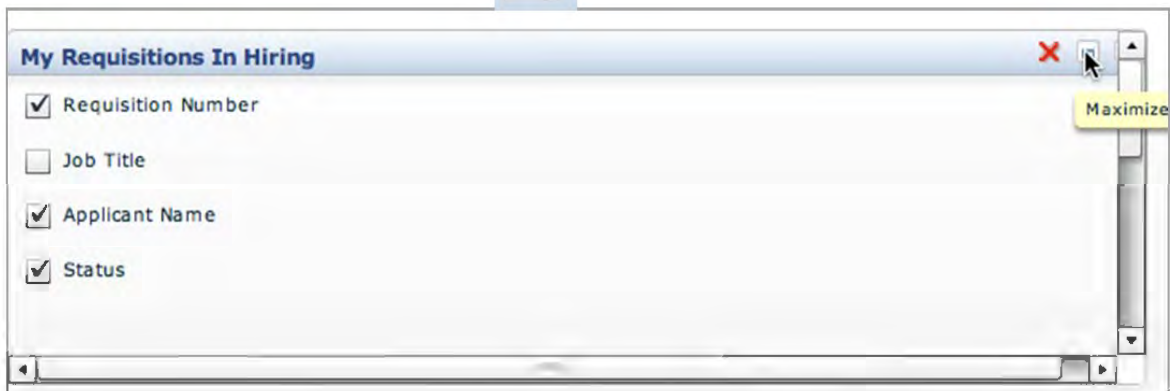





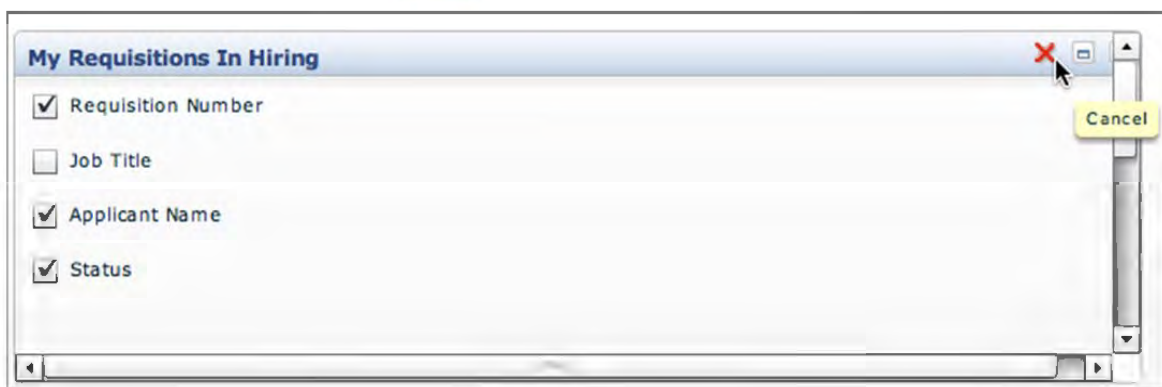
For example, the **My Requisitions in Hiring** panel displays the following options to edit. Selecting or de-selecting the options in the list changes which fields display.



Clicking the **Job Title** field means this column is now de-selected. To maximize the editing panel while editing, select the maximize  icon.



To cancel the edit, select the red  cancel icon.





To save the edit, scroll down using the right scroll bar and select **Save**.

Notice, that in addition to editing the visible fields, you can also freeze columns or limit/expand the amount of shown information. In this example, users can edit the panel so that it shows up to 50 Jobs.



The edited panel will display as below. Please notice that the **Job Title** column is now missing.

Requisition...	Applicant...	Status
<a href="#">128</a>	<a href="#">Jane K...</a>	<a href="#">Hired</a>
	<a href="#">Denzel...</a>	<a href="#">Hired</a>
	<a href="#">Ben Ka...</a>	<a href="#">Hired</a>
<a href="#">234</a>	<a href="#">Test Fi...</a>	<a href="#">Hired</a>
<a href="#">116</a>	<a href="#">John</a>	<a href="#">Hired</a>

Follow the same steps to return to original panel or make additional edits.

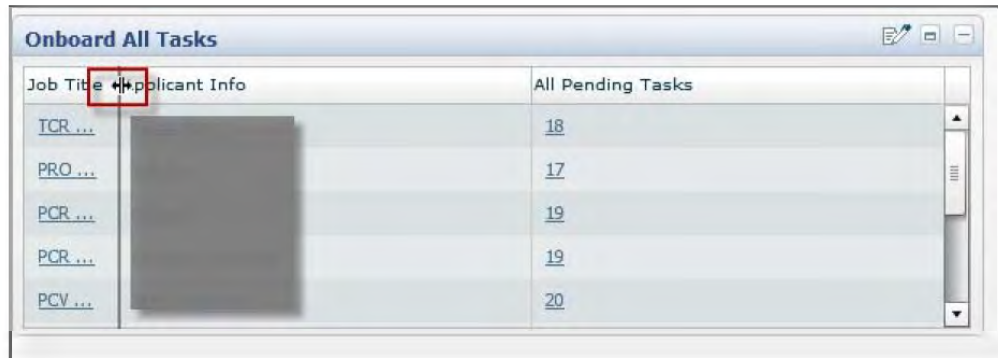
### Resizing a panel:

See how the **Job Title** column is not completely visible in the panel above.

Job Title	Applicant Info	All Pending Tasks
<a href="#">TCR ...</a>		<a href="#">18</a>
<a href="#">PRO ...</a>		<a href="#">17</a>
<a href="#">PCR ...</a>		<a href="#">19</a>
<a href="#">PCR ...</a>		<a href="#">19</a>
<a href="#">PCV ...</a>		<a href="#">20</a>



Selecting in between the columns makes the arrow graphic appear. This allows the column to be re-sized to a preferred width.



Drag the arrow graphic to the desired column width. Now, more of the Job Title column is visible.



### Summary of Panel Icons

Action	Icon
Add	<a href="#">Add Panel &gt;&gt;</a>
Remove	
Refresh	
Edit	
Maximize	



Restore (to original size)	
Cancel (when editing)	





## 21.6: Candidates in 2xO (New Hire Portal)

Candidates will complete registration forms and other Onboarding tasks in their own separate 2xO portal. Users can track the completed applicant activities by viewing the applicant in the administrative side of 2xO (ways to monitor and track applicants will be discussed in the next section).

Users should be familiar with how applicants perform activities and tasks in the New Hire Portal. That way if a Applicant contacts them, they will be familiar with the interface.



Be aware: In other communications being sent to applicants or materials, this may be referred to as the Onboarding Portal.

### 21.6.1: Applicant's Page (New Hire Portal)

The New Hire Portal is where the applicants will receive valuable pre-departure information, complete activities, forms, and learn information about their host country (Post). Each Applicant that is at the HR Status of Invitation Accepted is automatically sent an email that directs them to the New Hire Portal login page.

Candidates will receive an email link that will take them to the login screen below. They will log in using the username and one-time system-generated password that was emailed to them.



Immediately following their initial login, they will be required to change their password to something of their choosing using the Reset Password screen below.

**Reset Password**

New Password:

Confirm Password:

Submit

Candidates who forgot their password will be able to reset their password themselves. The Help hyperlink (<https://kr2x-staging.kenexa.com/NewHirePortal/NHPLLoginHelp/ForgotPassword.html>) will direct the applicants to instructions on how to reset their password.

*If a user needs to walk a Applicant through the password reset:*

1. On the New Hire Portal Login page, click the Forgot Password hyperlink.
2. On the resulting page (also called New Hire Portal Login), enter your username (this will be your email address) into the Username text box, and click the Sign In button. The Forgot Password pop-up appears. It contains the Secret Question you selected in the Profile page.
3. Enter the answer to the Secret Question in the text box, and click the Submit button. If you provided the correct answer, the Reset Password pop-up appears.
4. Enter a new password into the New Password text box, enter it into the Confirm Password text box, and click the Submit button. The New Hire Portal Login page appears. Note: You will be prompted with error messages if the password does not meet the system requirements for the number and type of characters.



Once logged in, Candidates will see the following page:

ew Hire Portal Login Page on

Peace Corps

Help Reset Password Logout

Content Dashboard Volunteer Information eSignature Forms

Welcome Video

Things to Know

PCV Assignment Information

Country Desk Unit Contact Information

Start onboarding process

Activity Overview

Tasks and Reminders

Welcome to your Peace Corps applicant portal!

From this portal, you will be able to complete required and optional Peace Corps forms, validate existing information, provide the Peace Corps other necessary information, and see your progress on "next step" activities.

Please navigate through each of the following tabs in order to complete the activities described below:

- Dashboard: Welcome Video and other Important Information
- Applicant Information: Confirm that your contact information is accurate or learn how to correct it.
- Forms: Access and complete required forms prior to your Staging event.
- Agreements and Policies: Acknowledge having read or completed required activities prior to your Staging event.

In addition, please visit the Content tab in order to get information about serving as a volunteer in your country of service and other important training information.

Live Help

Form Type	Form Name

Activity	Count
Forms	4
Additional Steps	14



## 21.6.2: Types of Applicant Activities

### Additional/Onboarding Steps

Candidates complete activities by selecting them from the list of Additional Steps below. Some activities are simple acknowledgements of having received, read or submitted Peace Corps documents, but many are more involved. Users should note that these activities are the standard activities traditionally associated with preparing someone for Staging, except that the forms will now be distributed and collected electronically instead of as hard copy paper documents. For example, the Trainee/Volunteer Registration Form, the Privacy Act Waiver and the World Wise Schools Applications that are now sent to applicants as part of their invitation and/or Staging materials can now be completed by applicants electronically.

**Additional Steps**

Once all the steps below are complete, click the "Forms" tab at the top of this page to continue.

Show: **All**

Onboarding Step	Status
Volunteer Assignment Description and Welcome Book	Pending
Resume and Aspiration Statement Submission	Pending
Confirm Visa and Passport Application Submission	Pending
Direct Deposit	Pending
<b>World Wise Schools Application</b>	<b>Pending</b>
Homeland News Release	Pending
Life Insurance Designation of Beneficiary or Waiver	Pending
Authorization to Release Personal Materials	Pending
Privacy Act Waiver	Pending
Safety and Security Training	Pending

**Activity Overview**

Bar chart showing the number of activities completed (Forms) and pending (Additional Steps).

**Tasks and Reminders**

Form Type	Form Name
Additional Steps	
Forms	

Back Next

As applicants complete activities, they will change from Pending to Completed in the Status column and the activity will automatically drop to the bottom of the list. In addition, the Applicant can click on the Activity Overview window to see how many activities they've completed and how many are still pending.



Example (below) of a simple acknowledgement type activity.

The screenshot shows a web form titled "Resume and Aspiration Statement Submission". It contains two main fields: a text area with the instruction "I have submitted my updated Resume and Aspiration Statement as directed by my 'next steps' email when I accepted my invitation for service." and a "Date Submitted" field with a calendar icon. Both fields are marked with a red asterisk, indicating they are required.

Example (below) of a more complex activity.

The screenshot shows a web form titled "Trainee/Volunteer Registration Form". It contains numerous fields for personal and contact information, including First Name, Middle Name, Last Name, Date Of Birth, Marital Status, Social Security Number, Sex, Permanent Address, City, State/Province, Zip/Postal Code, Primary Phone, and Next of Kin information. The form is marked with red asterisks for required fields. The Next of Kin section includes fields for First Name, Middle Initial, Last Name, Relationship to Applicant, and Name/Address.

Unlike other types of Onboarding activities, data entered by applicants in these activities can export to existing Peace Corps systems. This will replace the need for users to manually enter this information off of paper copies of the same documents following each Staging event (which is the current practice).



## eSignature

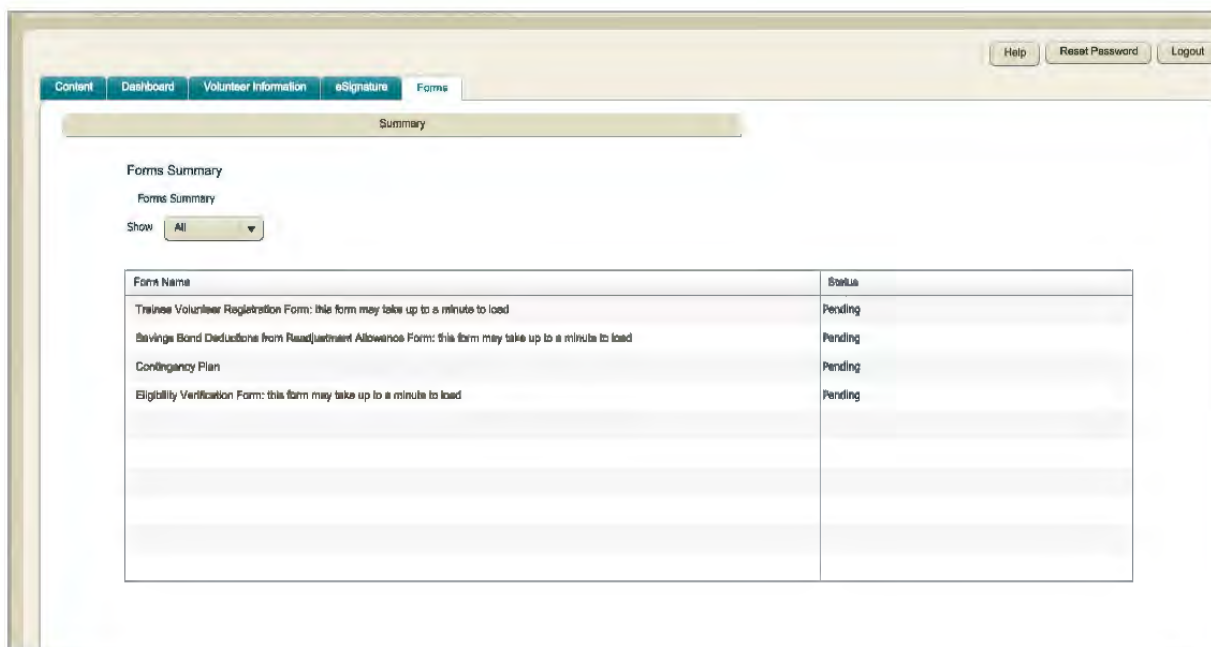
eSignature is an option where applicants can sign the screen using their mouse and cursor. The image is then saved and inserted in the signature field on forms completed in the Forms tab.



Candidates must save an eSignature before being granted access to the Forms tab.

## Forms

Select forms are also available in the New Hire Portal. In most cases, forms are fillable PDF replicas of existing Peace Corps forms.







All but one form should be completed and submitted online. The Eligibility Verification Form cannot be submitted online via the New Hire Portal. This form must have the Applicant's actual signature and must be turned in, in-person, during the Applicant's Staging event. Instructions on this form guide applicants to print the form and sign it in person at their Staging event.

Unlike data entered in Additional/Onboarding Steps, data entered in forms does not export to other Peace Corps systems. The information will reside on the form inside of 2xO until such time that Users need to retrieve it for some reason. Completed forms can also be sent from one User to another.

### **Summary of All Activities and Forms**

<b>ACTIVITIES IN 2XONBOARDING</b>	
<b>Name</b>	<b>Description</b>
<b>Acknowledge Bridge to PST</b>	This <b>required activity</b> provides a checkbox for the applicant to acknowledge that they have received the Bridge to PST information from the CDU
<b>Confirm Visa and Passport Application Submission</b>	This <b>required activity</b> provides a checkbox for the applicant to confirm that their visa and passport information has been submitted to SATO.
<b>Direct Deposit</b>	This <b>required activity</b> requests key bank information so that the applicant can receive their readjustment allowance via a direct deposit.
<b>Eligibility Verification Activity</b>	This <b>required activity</b> gathers updates from the applicant concerning any changes to their eligibility for the Peace Corps since the time that they submitted their Peace Corps application (e.g., change to marital status, citizenship, legal or financial dependents, etc.). The information gathered in this activity will automatically fill the Form of the same title in the Forms tab.
<b>Life Insurance Designation of Beneficiary or Waiver</b>	This <b>required activity</b> allows applicants to designate a life insurance beneficiary <b>or</b> waive their rights to life insurance. This activity replaces the need for two distinct <i>paper</i> forms that were often completed incorrectly.
<b>Privacy Act Waiver</b>	This <b>required activity</b> allows applicants to authorize the Peace Corps to disclose the Applicant's financial information with a third party of the Applicant's choosing.
<b>Resume and Aspiration Statement Submission</b>	This <b>required activity</b> provides a checkbox for the applicant to acknowledge having submitted a revised resume and aspiration statement as instructed following their invitation.
<b>Safety and Security Training</b>	This <b>required activity</b> provides a checkbox for the applicant to acknowledge having received the pre-departure safety and security information.
<b>Trainee/Volunteer Registration Form</b>	This <b>required activity</b> gathers contact information for the applicant, their next of kin, and any emergency contacts. The information gathered in this activity will automatically fill the Form of the same title in the Forms Tab.
<b>Volunteer Assignment Description and Welcome Book</b>	This <b>required activity</b> provides a checkbox for the applicant to acknowledge that they have received and reviewed their VAD and Welcome Book.
<b>Authorization to Release Personal Materials</b>	This <b>optional activity</b> allows applicants to designate whether they authorize the Peace Corps to use their personal materials or documents in the agency's marketing materials.
<b>Hometown News Release</b>	This <b>optional activity</b> allows applicants to provide contact information for their hometown/local paper, in addition to select information about him/her, so a news release can be sent to that publication.



ACTIVITIES IN 2XONBOARDING	
Name	Description
<b>Savings Bond Deductions from Readjustment Allowance</b>	This <b>optional activity</b> allows applicants to request to have a Savings Bond deduction from their monthly readjustment allowance. The information gathered in this activity will automatically fill the Form of the same title in the Forms tab.
<b>World Wise Schools Application</b>	This <b>optional activity</b> allows applicants to correspond with a classroom in the United States during their service in the Peace Corps.

FORMS IN 2XONBOARDING	
Name	Description
<b>Eligibility Verification Form</b>	This <b>form</b> will automatically fill with the Applicant's responses to the Eligibility Verification activity. The Applicant's eSignature will <u>not</u> automatically fill in to the signature field on this form because the instructions state that the applicant must print the form and sign it in person at their Staging event.
<b>Contingency Plan</b>	This <b>form</b> allows applicants to document their informal plans for transitioning back into life in the U.S. should their service be shortened for unforeseen reasons.
<b>Savings Bond Deductions from Readjustment Allowance Form</b>	This <b>form</b> will automatically fill with the Applicant's responses to the Savings Bond Deductions from Readjustment Allowance activity. The Applicant's eSignature will automatically fill the signature field on this form.
<b>Trainee Volunteer Registration Form</b>	This <b>form</b> will automatically fill with the Applicant's responses to the Trainee/Volunteer Registration Form activity. The Applicant's eSignature will automatically fill as the signature field on this form.

FIELDS IN 2XONBOARDING	
Name	Description
<b>Personal Information</b>	These <b>fields</b> will automatically fill with information the Applicant provided in their original application (name, contact information, etc.). Applicants simply need to validate the information, select a Secret question and provide an answer.
<b>Things to Know</b>	These <b>fields</b> provide up-to-date contact information for the CDU, as well as the PST Start Date for the individual Applicant's program.

### 21.6.3 Additional Steps

Applicants must complete all of their required tasks and forms in order to be staged. If information in a form or activity needs to be corrected, the applicant will need to contact their CDU in order to have the activity "looped back" or the CDU can make the necessary change in the administrative side of 2xO.



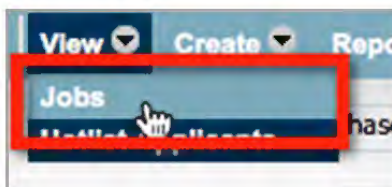
## 21.7: Actions in 2xO

Regions are assigned Jobs (TCRs) that organize applicants during the Onboarding Process. Regions will primarily View Jobs from the Global Toolbar and the panels in the dashboard to perform actions on their respective applicants in the Onboarding Process.

### 21.7.1: Regions Initial Steps

Regions initiates the steps to Onboard the applicants.

Regions will go to **View < Jobs** to locate their Job (same Req No. as their TCR).



Once on the **Jobs** page, Regions will select their TCR (TCR Honduras in the example below).

Req No	Job Title	Location	Participant	Aging	Days in Phase	Total Number Of Openings	New Applicants	Applicants with ne	Most advanced s
517	PCV QA Test R...	/			6 Selection	5	2		Hired(2)
516	TCR Honduras	/			8 Selection	5			Hired(Will Carry)
513	PCR Onboard...	/			9 Selection	4	2		Hired(2)
512	PCR Test Reg I...	/			5 Selection	5	2		Hired(2)
511	PCV QA Test R...	/			10 Selection	5	4		Hired(4)
510	PCR Test Reg I...	/			9 Selection	5	2		Hired(2)
498	PCR Test Integ...	/			16 Selection	5	5		Hired(5)
418	PRO Cyclis...	/			0 Selection	50	1		Hired(Will Arrey)
234	Database Adm...	/		12	12 Selection	5	1		Hired(Test Fields)
134	TCR Tonga Q4...	/			13 Selection	10	4		Hired(4)

In the case of multiple Jobs, users will be able to scroll from page to page (see bottom scroll arrows). Once they select the Job associated with their TCR, users will be able to view applicants within the Job.

Locating applicants through the View Jobs page is the preferred method for accessing applicants because users can view Onboarding status information on a specific Applicant without being part of that Applicant's TCR req team.



The first thing Regions should do to the applicants' details is make sure the contact information of the Regions' CDU is up to date. Both the Post and CDU Email Address should autofill based on information brought over from DOVE. The CDU will simply need to enter their telephone number and click "Post to Things to Know."

On the subsequent page (see below), the CDU will need to validate that the Post name, Job Title and Staging Start Date are correctly autofilled and click "Post to Things to Know."  
**[Screenshot Update to show Post to Things to Know]**

Upon clicking "Post to Things to Know" for the second time, the next page that appears will actually be the first activity for the applicant to complete in their New Hire Portal. Users must take care **NOT** to touch or complete any additional fields in that activity or they will appear completed for the applicant.

When users (CDU) have completed their two (2) actions the **"Post to Things to Know" button, will change to a "Continue" button**, and **red instructional text** directed towards the Applicant will appear.



IF YOU SEE A CONTINUE BUTTON **STOP, DO NOT** ENTER ANY MORE INFORMATION. **DO NOT** CLICK THE CONTINUE BUTTON.



The fact that the **instructional text is red** is an indication that this is an applicant activity rather than one for the user to complete.

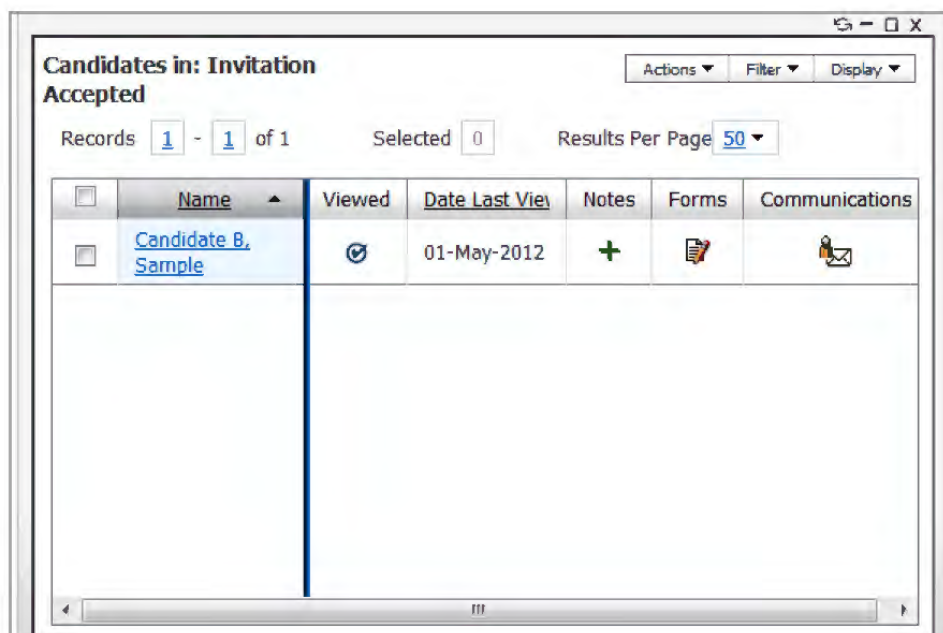


The Applicant automatically receives their login email from the system once they are at the HR Status of Invitation Accepted. However, Regions should monitor both their TCRs in DOVE for Invitation Accepted applicants, as well as, their Jobs in 2xO to identify applicants who need to have the Onboarding Process started for them. See below for how to monitor in DOVE for applicants in 2xO.



Status	Total	New	Last Activity Date
Invitation Accepted PCR	<a href="#">1</a>	<a href="#">1</a>	06-Dec-2011
Invitation Accepted	<a href="#">1</a>	<a href="#">0</a>	22-Dec-2011
Invitation_Accepted	<a href="#">2</a>	<a href="#">2</a>	03-May-2012
Final Medical Clearance	<a href="#">2</a>	<a href="#">2</a>	08-May-2012

The user has one Invitation Accepted DOVE Candidate. Ignore Invitation\_Accepted as this is a total of all applicants that are Invitation Accepted including PCRs.



	Name	Viewed	Date Last View	Notes	Forms	Communications
<input type="checkbox"/>	<a href="#">Candidate B, Sample</a>	<input checked="" type="checkbox"/>	01-May-2012	<a href="#">+</a>	<a href="#">+</a>	<a href="#">+</a>





If the user selects the number hyperlink, the Invitation Accepted applicants will appear. Applicants at Invitation Accepted are then locatable in 2xO as applicants.

Within the Job, users will be able to view Job details (TCR details), applicants, Participants (Peace Corps users), Hotlisted applicants, and Job History.

The screenshot displays the DOVE 1.0 System Manual interface. At the top, there is a navigation bar with a back arrow, a dropdown menu, and links to Dashboard, Tasks, View, Create, Reports, and Settings. Below this, the main header shows a dropdown menu, a red box around the number '516', and the text 'TCR Honduras Q1 FY13'. A link for 'Brian Melman' is visible. A red box highlights a row of tabs: 'Job Details', 'Applicants [0 | 0]', 'Participants', 'Hotlist', and 'History'. Below the tabs, a red box highlights the 'Job Overview' section, which contains the following information:

- \*Job Code: TCR Requisition
- \*Title: TCR Honduras Q1 FY13
- \*Total Number Of Openings: 5
- 2xB Req ID: 516BR
- Country of Service: Honduras
- \*Post: Tonga
- Program Area:
- PCR Projected Start Date:
- PCR Partner:
- PCR Duration:
- PCV Fiscal Year: FY2013
- PCV Fiscal Quarter: Quarter 1
- PCV Staging Start Date: Nov 27 2012
- Assignment Area: 175

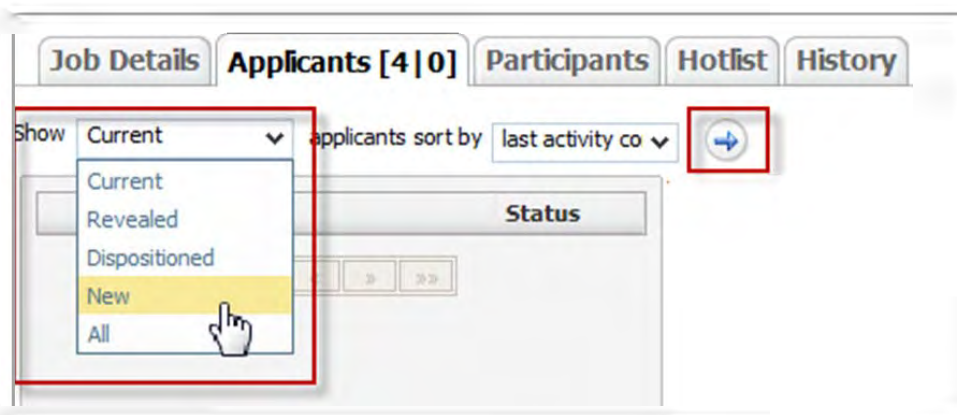




**Job Details Window:** The information contained in the Job Details window will autofill from the reqs in DOVE. CDUs should note that all fields in the above screenshot will be available for all applicants. However, those Job Overview fields unique to Peace Corps Response (PCR) Jobs will be left blank in a Job Overview of PCV Jobs (and vice versa).

Option	Description
<b>Job Details</b>	Job Details is the first option that appears when selecting the Job from Jobs page. It displays key Job/TCR information (see above).
<b>Applicants</b>	Selecting <b>Applicants</b> , users will be able to see where the applicant is in the process (see next section below)
<b>Participants</b>	Selecting <b>Participants</b> will list the affiliated 2xO users and system administrators for a given Job.
<b>Hotlist</b>	Selecting <b>Hotlist</b> will identify the applicants that a user has placed on a Hotlist. Hotlist applicants are like all other applicants except that they have been given this designation for quick identification.
<b>History</b>	This serves as log of actions taken in that Job.

### Applicants tab:



The numbers in brackets on the Applicants tab signify applicants requiring administrative tasks. The first number refers to how many applicants need to be reviewed; the second number is the number of tasks that have been completed for those applicants (i.e., how many have had their Onboarding initiated by the user).



To select all, current, revealed, dispositioned, or new applicants—select the specific filter you wish to use from the left dropdown menu and then click the blue arrow to execute the filter.





12 days old, 12 days in Selection Open Revealed to Hiring Man

1

Job Details **Applicants [4 | 0]** Participants Hotlist History

Show All applicants with job application status of Any and Rated Any sort by last activity co

Name	Status
Mark Appleseed	Hired
Jane Appleseed	Hired
Delah Appleseed	Hired
Janet Appleseed	Hired

2

3

**\*Confirm Visa and Passport Application Submission**

Applicant: Mark Appleseed  
Current Status: **Hired**

Rate Other Actions

Complete Save and finish later

Review the information provided for this applicant. Fill the required fields (if any) marked by asterisk(\*) and click the "Complete" button above to move the applicant to the next step in the hiring process.

I hereby certify that I have submitted the appropriate passport application (DS-11 or DS-82) and any applicable country-specific visa application to SATO Travel. ☐ Date completed May 04, 2012

Add Notes

7


World Wide Schools Application Hometown News Release I Life Insurance Designation of Beneficiary or Waiver - PCV Authorization to Release Personal Materials Privacy Act Waiver Safety and Security Training Savings Bond Deductions from Readjustment Allowance Form Eligibility Verification Form II

8

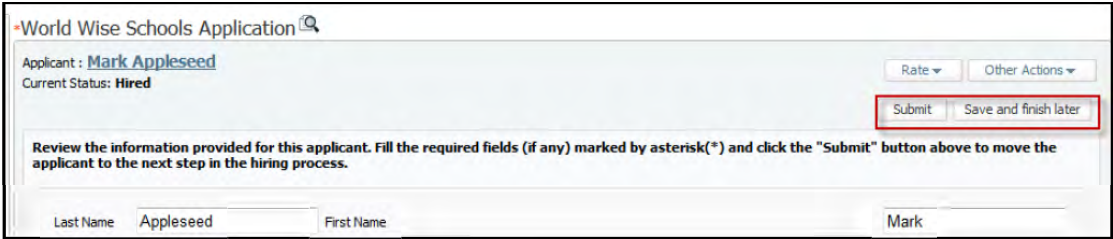
Attached Documents

9

Resume Current Jobs

#	Description
1	<b>Applicants Tab:</b> In this example there are 4 applicants that are currently in the Onboarding Process for this particular Job. Note that in this example there are no pending tasks.
2	<b>Applicants:</b> The applicants in the selected Job will appear in a left window. Applicants that have yet to be viewed by the user will have an arrow immediately to their right, as shown in the example above.
3	 <b>Other Actions:</b> Selecting this option allows users to email a resume, submit the applicant to a Job, or follow-up on an applicant. Follow-up will set a reminder (more later). Peace Corps users will seldom, if ever, use Email Resume or Submit to Job.
4	<b>Complete:</b> Selecting complete will complete and submit an individual applicant activity or form. Great care should be taken <u>not</u> to click this button because it will now appear to the applicant that they have completed this activity.



#	Description
5	<p><b>Save and finish later:</b> This will save any changes to the Applicant's record in 2xO and allow you to return to it later.</p> 
6	<p><b>Attached Documents:</b> This is where the completed forms are saved once completed. Users should view the documents here to verify accuracy and completeness prior to Staging.</p>
7	<p><b>Add Notes:</b> This section allows you to save notes to an Applicant's activity that only you can view if/when you reopen that activity. Notes added by users are not visible to applicants. Remember to select <b>Save and finish later</b> to save this note.</p>
8	<p><b>Activity/Forms Hyperlinks:</b> These links will disappear as an activity is submitted in the New Hire Portal. To view an activity/form, select the link and a new page will open. Do not select submit or complete because doing so will actually complete the activity for the Applicant.</p>



## Participants Tab:

The **Participants** tab shows system admin and user roles, including Primary Hiring Manager (HM) and Primary Recruiter, for the users associated with each individual Job. In most cases, these roles equate to the roles that users have been designated in the TCRs (Owner, Manager, Req Team, etc.).

The screenshot shows the 'Participants' tab in the DOVE 1.0 System Manual. The interface is divided into two columns. The left column lists users with roles assigned. The first user is highlighted with a red box, showing 'Primary HM' selected. The right column shows details for the selected user, including 'Location1, Location2, Location3' and checkboxes for 'Primary HM' and 'Primary Recruiter'. The 'Primary HM' checkbox is checked, and the 'Primary Recruiter' checkbox is also checked.

In the **Participants** tab (displayed above) the highlighted System Administrator is selected as the Primary HM. The Primary HM equates to the TCR req Owner. VDS Recruitment is set as the Primary Recruiter. Keep in mind in 2xO its about the Job (TCR), so Primary Recruiter ordinarily equates to the TCR Req Manager. Other req team members may serve as system administrators to monitor or assist in 2xO.

## Hotlist tab:

The Hotlist will serve as a search tool for users, and as a way to draw attention to an applicant without changing their status or Job. However, the search options from the Global Toolbar is a more preferred Search option. To function efficiently, users of 2xO will need to organize the applicants in a Hotlist before performing a search.

The **Hotlist** tab is a series of dropdown menus that allow the user to drill down in the Hotlist.

The first field displays an option allowing users to select active, inactive, or all Hotlists.



The second field allows you to select both, internal, or external content. As Peace Corps has a single Job posting (Evergreen Req), it is likely that they will select the Internal option.

This field allows users to select from Hotlists. Users who do not have Hotlists might want to select Both Hotlist to search more information.

The highlighted sections here allow users to type in their own keyword criteria.





Users will see the option to select grade or pay rate type; however, the Peace Corps will **not** have entries for this data in 2xO, so there is no need for users to include this criteria in a search.

Once all fields are set, execute the search by clicking the arrow. The results will display below.

## History tab

This tab shows the applicant history in 2xO. The **Summary** indicates a global view of the information. The **Selection** shows when the Job was created. Users can also select and de-select which **History Details** to display. Select the **Reload** button to update the information.

*Other options in the Job section of 2xO:*



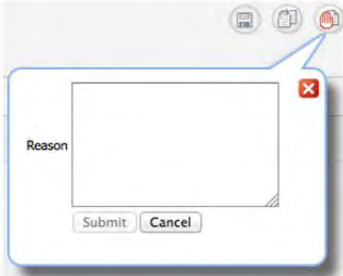


## Other options...


Within the Job section, users will see the following options on the top right of the window.



Although users can see these options, the following is just for informational purposes. Users should ignore these options.

Option	Description
	<b>Edit Job:</b> This option allows you to edit the content on the page. Select <b>Save</b> to preserve the change.
	<b>Save:</b> If changes are made to a page, users should select <b>Save</b> to preserve the change.
	<b>Clone Job:</b> Users <b>will not use this function</b> because Jobs automatically populate 2xO via an integration with DOVE.
	<b>Job on Hold:</b> To put the Job on Hold, type in the reason and select submit. Peace Corps may only use this function if an entire Training Class has been suspended or cancelled. 
	<b>Status:</b> This option shows the status of applicants in a Job. This defaults to “Any.” Selecting Reveal will display any pending or hidden content.
	<b>History:</b> This shows a high-level history of a Job. In this case, the Job is 10 days since it was created (i.e., when the first applicant was copied into the Job due to their HR Status of Invitation Accepted).

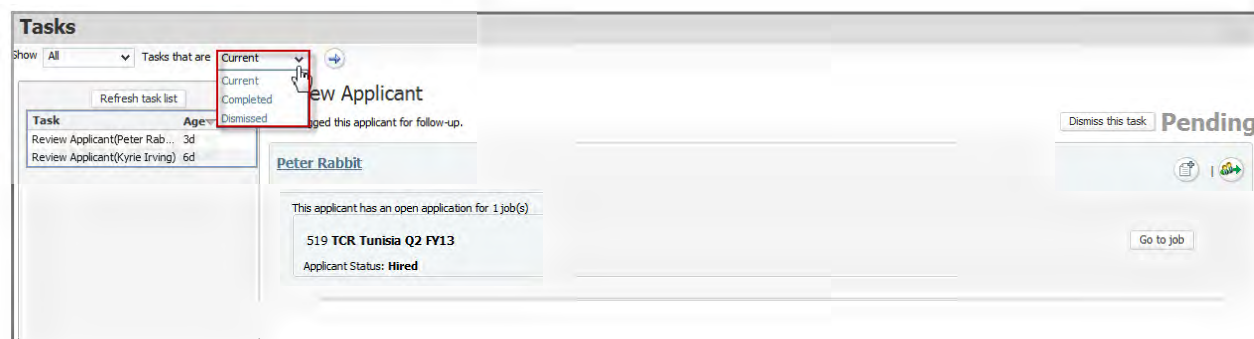


Option	Description
	<b>Disposition:</b> When selecting an Applicant's name hyperlink within a Job, this option will be visible. This allows you to disposition an Applicant in 2xO. <u>Dispositions should be done first in DOVE and only later in 2xO after a CDU receives a TCR Change Form.</u>

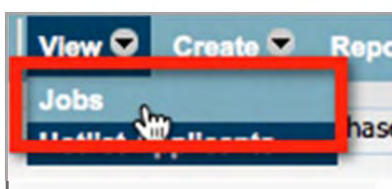
### 21.7.2: Processing Applicants

Once applicants begin to complete activities in their **New Hire Portal**, users will be able to see their applicants' progress by viewing 2xO Applicants.

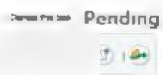
1. Navigate to the **Task tab** and click on the **Tasks option**. Tasks will show all pending tasks for that user (not for the applicant). The resulting screen shows **All** and **Current** tasks as the default (see below). Selecting All Current tasks will provide the user with a list of the tasks that they are responsible for completing. Users can also select to see Applicant tasks that are complete or pending.



2. This view (above) will allow users to go to **Job** (View < Job option).



3. This view also allows users to review information about an Applicant, including tasks that are pending or complete.



Don't accidentally complete the tasks for the applicants!

4. Regions can "loop back" certain activities or forms so that applicants can edit incorrect fields. **Note:** Loop back clears an entire activity, not just the incorrect field(s).



21.7.2: Monitoring Applicant Activities

In addition to initiating Onboarding for applicants, users will monitor Applicant activities by watching their dashboard panels and viewing the pending tasks of the applicants in their Jobs (View < Jobs). Certain dashboard panels are more useful than others depending on the role you play in the Job or TCR. However, panels prove useful to monitor even if you are a req team member on the TCR rather than a Hiring Manager or Primary Recruiter in 2xO.

Using Panels to Monitor

There are several panel options in 2xO. The following are the dashboard panels available in 2xO:

**Onboard All Tasks:** This displays tasks based a Applicant's Job Title (according to their TCR), Applicant Info (Applicant Name), and All Pending Tasks (this the number of remaining tasks). This panel is very useful for all users to view all tasks based on Job, and ultimately by Applicant (not just for Hiring Managers [HM] or Primary Recruiters).

Onboard All Tasks		
Job Title	Applicant Info	All Pending Tasks
<a href="#">PRO Cyclist (418)</a>		<a href="#">19</a>
<a href="#">PCR Onboarding Test 3 (513)</a>		<a href="#">19</a>
<a href="#">PCR Test Req ID Pass Thru DR (512)</a>		<a href="#">19</a>
<a href="#">PCV QA Test Req DR (New Workflo...</a>		<a href="#">20</a>
<a href="#">TCR Tunisia Q2 FY13 (519)</a>		<a href="#">20</a>

This panel can be edited to show up to 100 Jobs (see below). After editing the number of Jobs, select **Save to update the panel.**

Onboard All Tasks

Show 10 Jobs

Save



**Onboard My Tasks:** This shows Job Title (TCR name), Applicant Info (Applicant Name), My Pending Tasks, and Last Completed Activity only for Jobs that this user is identified with as Hiring Manager or Primary Recruiter. Editing this panel allows users to show up to 100 tasks. This panel is useful because it is showing only the tasks assigned to that user by Job and Applicant. At present, there are only two pending tasks for users to complete – the two initiating Onboard activities described in 21.7.1.



Job Title	Applicant Info	My Pending Tasks	Last Completed Activity
<a href="#">PRO Cyclist (418)</a>	<a href="#">null null</a>	<a href="#">2</a>	
<a href="#">TCR Kazakhstan Q2 FY13 (524)</a>	<a href="#">CandidateC Onboarding</a>	<a href="#">2</a>	
<a href="#">TCR Kazakhstan Q2 FY13 (524)</a>	<a href="#">CandidateB Onboarding</a>	<a href="#">2</a>	
<a href="#">TCR Kazakhstan Q2 FY13 (524)</a>	<a href="#">CandidateA Onboarding</a>	<a href="#">2</a>	
<a href="#">TCR Kazakhstan Q2 FY13 (524)</a>	<a href="#">Company Acme</a>	<a href="#">2</a>	

**My Requisitions In Hiring:** This shows the Requisition Number (Req ID of the TCRs currently in 2xO), Job Titles, Applicant Names (Applicant Name), and Status (Hired - meaning they have accepted their invitation) of TCRs the user is identified with. This panel is useful to show all the Jobs that contain Invitation Accepted applicants and the applicants in them.



Requisition Number	Job Title	Applicant Name	Status
<a href="#">524</a>	<a href="#">TCR Kazakhstan Q2 FY13 (5...</a>	<a href="#">Company...</a>	<a href="#">Hired</a>
		<a href="#">Candidat...</a>	<a href="#">Hired</a>
		<a href="#">Candidat...</a>	<a href="#">Hired</a>
		<a href="#">Candidat...</a>	<a href="#">Hired</a>
<a href="#">123</a>	<a href="#">Kenya TEST (123)</a>	<a href="#">Taina Tai</a>	<a href="#">Hired</a>

This panel can be edited to show up to 100 Jobs and users can change which fields display (see below).



**My Requisitions In Hiring**

- ☒ Requisition Number
- ☐ Job Title
- ☒ Applicant Name
- ☒ Status



**Hiring Summary:** This populates a report list of Job status, Number of new hires, Acceptance ratio, Average Time to fill, and Average Cost to Hire. This panel will be less useful to the Peace Corps because no Jobs are constructed in 2xO (they roll over from DOVE), no one is hired in 2xO (they accept invitations in DOVE), and 2xO is not being used to track hiring costs (application costs).

**Hiring summary(This quarter)**

Job status	19 total, 0 Construction, 19 selection, 0 hiring, 0 On hold
Number of new hires	50
Acceptance ratio	0.0%
Average Time to fill	0.0 day(s)
Average Cost per hire	\$0.0

The hiring summary can be edited to show requisitions created or openings based upon different durations of time (see below).

**Hiring summary(This quarter)**

☒ Requisitions created ☐ Openings

Duration: **This year**

- This year
- Last one year
- Today
- This quarter
- Last 2 months

**Save**

**Task Summary:** This displays the tasks for the user to perform. This task can be edited to show up to 50 tasks. This is useful because it shows a summary of all tasks for the user to perform. In a practical sense, it shows the user how many applicants still require to have the Onboarding Process initiated or ended.

**Task Summary**

Review Applicant





**Onboard New Hire List:** This displays Job Title (TCR name), Applicant Info (Applicant Name), Hire Date (date of invitation accepted), and Start Date. This panel is useful because it tracks when the Candidates accepted their invitations to particular Jobs. This can be edited to show 100 hires and the columns can be easily sorted by clicking on the column titles (see Job 524 in the example below).

Onboard Dashboard		
Peace Corps		
Dashboard Tasks View Create Reports Settings		
Dashboard		
Onboard New Hires		
Job Title	Applicant Info	Hire Date
<a href="#">Principal Software Engineer (109)</a>	<a href="#">PCR Test</a>	03-08-2012
<a href="#">Principal Software Engineer (110)</a>	<a href="#">PCR Onboarding</a>	03-08-2012
<a href="#">Principal Software Engineer (110)</a>	<a href="#">Dr Seussa</a>	03-08-2012
<a href="#">Principal Software Engineer (110)</a>	<a href="#">Charlie Rose</a>	03-12-2012
<a href="#">QA Engineer (116)</a>	<a href="#">John Wayne</a>	03-20-2012
<a href="#">Rural Tourism Marketing Specialist (356)</a>	<a href="#">Maisy Mouse</a>	04-26-2012
<a href="#">TCR Honduras Q1 FY13 (516)</a>	<a href="#">Will Carry</a>	04-24-2012
<a href="#">TCR Kazakhstan Q2 FY13 (524)</a>	<a href="#">CandidateB Onboarding</a>	05-14-2012
<a href="#">TCR Kazakhstan Q2 FY13 (524)</a>	<a href="#">Company Acme</a>	05-14-2012
<a href="#">TCR Kazakhstan Q2 FY13 (524)</a>	<a href="#">CandidateC Onboarding</a>	05-14-2012
<a href="#">TCR Kazakhstan Q2 FY13 (524)</a>	<a href="#">CandidateA Onboarding</a>	05-14-2012

### Report 1:

[Add Report 1 – need more info on use]



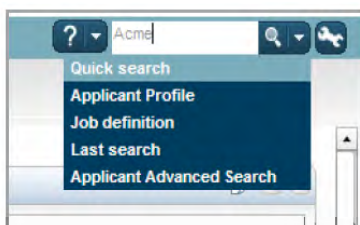


## 21.8: Other Actions in 2xO

### 21.8.1: Searching Options

#### *Quick Search*

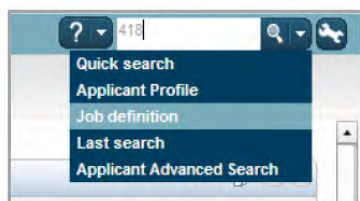
One of the easiest ways to locate a specific applicant in 2xO is using the Quick Search option from the top of the Global Toolbar.



Users can add an Applicant's name and Quick Search will quickly take you to the **Applicants tab** of the Job they are currently in. Users can then quickly see how many applicant activities are completed, view completed forms, etc.

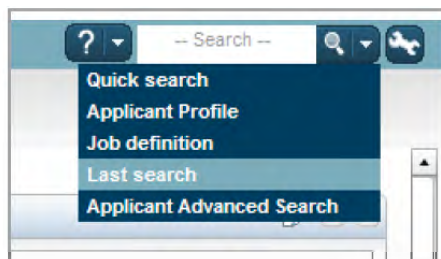
#### *Job Definition*

Users can either locate Jobs using the View tab in the Global Toolbar or by inserting the Req ID of the Job into the search bar and selecting Job Definition. 2xO will quickly present the user with the **Job Details tab** of the desired Job.



#### *Last Search*

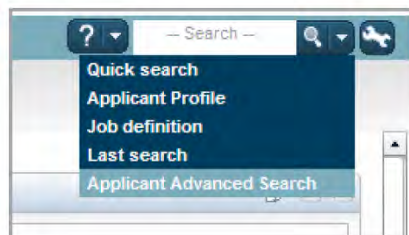
Selecting this option presents the user with the results of the last search run by that user.





## Applicant Advanced Search

Applicant Advanced Search is a powerful tool allowing users to search for applicants using any number of criteria including Requisition Number, Working Title, Country, Name, and more.



Search criteria can be saved so that the user can run the same search for applicants in the future without having to select the same criteria again.

### 21.8.2: Reporting Options (all users use – basically canned efforts can filter a little)

**Reports dashboard:** displays tabs for viewing report summaries and standard reports

**Standard reports:** accesses a set of standard reports provided by the system vendor.

**My Reports:** allows users to create and display custom reports, based either on modified Standard Reports or using fields of your choice.

**My Hire Statistics:** displays a list of your closed and assigned Jobs (reqs).



## Chapter 22: Reporting

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### 22.1: What is reporting?

A report in DOVE provides users with specific information on candidates, reqs, statuses, and other data within the Onboarding Process. A number of reporting tools exist within DOVE, including: searching, standard reports, panels, BA, DIT, etc. The tools can be helpful in managing workload and to provide useful information on the candidates within the system.

*Standard Reports* streamline the reporting process while providing customers with quick, basic system data. These reports are designed to help customers accurately track and report on Candidates within DOVE.

Other report functions exist within DOVE, like the Data Insight Tool (DIT) and Business Analytics (BA). These other options will be available for System Administrators and VDS Analysts. Additional reporting will exist outside DOVE.

This chapter will focus on the following aspects of reporting:

- How to Access Reports in DOVE
- Navigating within Reporting
- Searching v. Panels v. Reporting

#### 22.1.1: Reporting Best Practices

There are several best practices for accessing a report in DOVE.

- (1) Reports are for historical and trend data. Searching and DOVE Dashboard panels provide more real-time data.
- (2) From req searches or panels, users can take action. In reports, users cannot update HR Status or take actions.
- (3) Opening a report with an output format of Adobe Acrobat (PDF) is a good way to preview a report before saving and formatting the report in MS Excel (.xls).
- (4) When generating a report, selected time frames for searches cannot exceed 365 days.

### 22.2: Searching v. Panels v. Reporting

It is important to keep in mind that DOVE allows many reporting functions to be viewed, tracked, and monitored through other means, like performing a search or viewing a DOVE Dashboard panel. Reports are more static (depending on report cycles) and are limited for most users to those available in the standard reports. Performing a current search or refreshing a panel is a more active way to monitor and track candidate processing. If additional reports are needed (outside of those available in Standard Reports), System Administrators or VDS Analysts must be contacted. In light of this, general users will find the below sections most useful as it focuses on how to best leverage DOVE's options to find the information needed.



**While not all users have access to reporting, all users have access to some form of searching and the DOVE Dashboard panels.**



## 22.2.1: Benefits of Searching v. Panels v. Reporting

DOVE's searching and panel features offer great utility to its users<sup>1</sup>. First, searching and panels are available to most general users. Searching organizes reports into req or candidate output grids that can be exported into a grid (MS Excel), viewed as a printable page (.pdf), and personalized by editing sorting and criteria.

Select all	Title	Auto req ID	Req folder	No. of Nominations	Positions Remaining	Total candidates	Last Nom Date	Candidate Limit Manager	Owner	Location
<input type="checkbox"/>	Environmental Education	41288			4	0		N/A		
<input type="checkbox"/>	Secondary Education Math	41088		10	10	0		Unfilled		
<input type="checkbox"/>	Forestry	40588			25	0		Filled		
<input type="checkbox"/>	Forestry	30488			1	0		N/A		
<input type="checkbox"/>	Health Degree	27988		2	1	0		N/A		
<input type="checkbox"/>	Forestry	27888			1	0		N/A		
<input type="checkbox"/>	Forestry	24788			1	0		N/A		
<input type="checkbox"/>		23788			1	0		N/A		

This is the results of a req search for PCV Job Specific Reqs.

Second, Panels provide real-time data. They function like a canned report that need only be refreshed to deliver information.

Status	Total	New	Last Activity Date
Invitation Accepted PCR	1	1	06-Dec-2011
Application Received	16	16	30-Apr-2012
Application Complete	2	2	04-Nov-2011
Candidate Interviewed	10	9	08-May-2012
Nomination Cleared	8	7	22-Apr-2012
Nomination Validation Required	1	1	31-Jan-2012
Legally Cleared	3	2	30-Apr-2012
Invited	2	2	16-Apr-2012
Invitation Accepted	28	23	24-Apr-2012
Invitation_Accepted	17	13	03-May-2012
Final Medical Clearance	4	4	08-May-2012
Legally Received	1	1	15-Aug-2011
Nom Cleared Test	1	1	24-Sep-2011

Key HR Statuses can be viewed in the **My Candidates** panel.

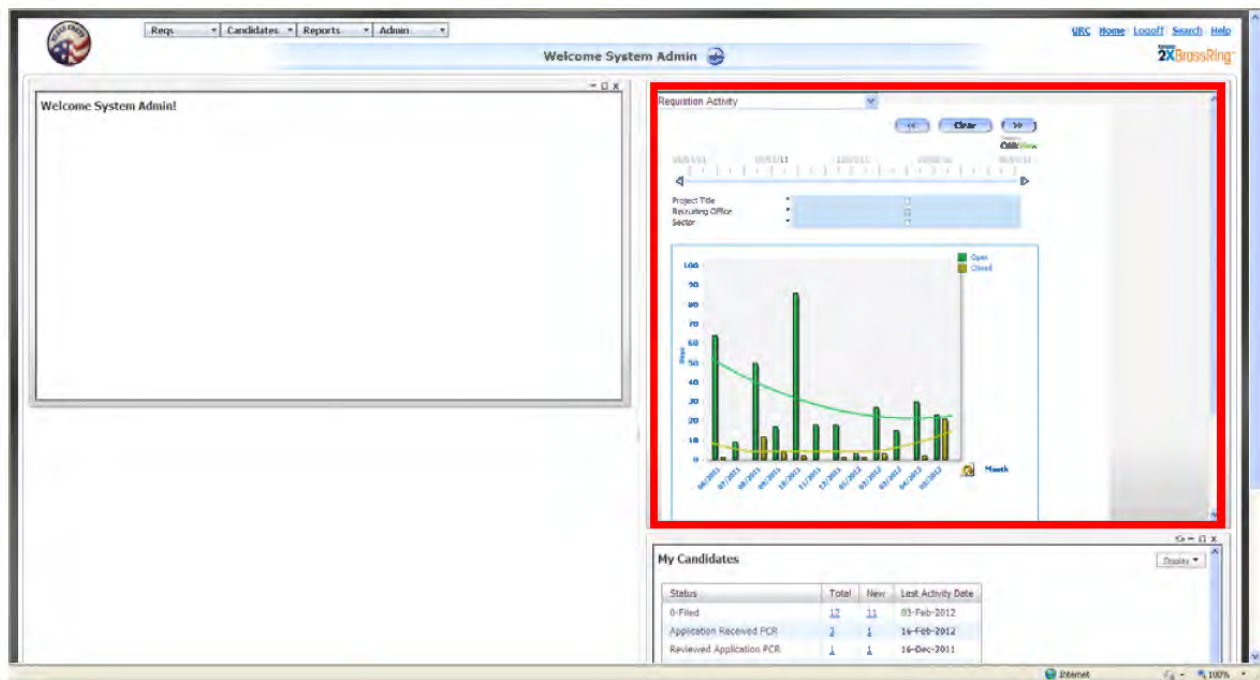
<sup>1</sup> This functionality will replace many of the traditional reports used in Peace Corps legacy systems.  
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Panels also allow users to drill down to specifics. Selecting a hyperlinked number in a panel can display links to individual candidates.

<input type="checkbox"/>	Name	Viewed	Date Last Vi	Notes	Forms	Candidate	HR Status
<input type="checkbox"/>	<a href="#">Candidate B, Sample</a>	<input checked="" type="checkbox"/>	19-Apr-2012	+		<a href="#">Active</a>	Nomination Cleared
<input type="checkbox"/>	<a href="#">Candidate B, Sample</a>	<input type="checkbox"/>	19-Apr-2012	+		<a href="#">Active</a>	Nomination Cleared

Metric Panels show some summary data of Candidate and req activity over certain periods of time. They are similar to standard reports, but are graphical and have some ability to drill down and filter data. These Metric Panels are only available for those users that have access to Business Analytics.







A user might be curious about who has currently accepted their invitations and they would perform an HR Action Activity report with the following filters:

Manager	<div>Doe1, John Doe13, John Doe2, John Doe6, John <b>Doe9, John</b> Earley, Jeanette Foradori, Laura</div> <div><a href="#">Selection details</a></div>
Owner	<div>Doe6, John <b>Doe9, John</b> Earley, Jeanette Foradori, Laura Garcia, Michael Gardell, Rachel Greene, Missy</div> <div><a href="#">Selection details</a></div>
HR status	<div>Interviewed - Not Selected PCR Interviewed PCR <b>Invitation Accepted</b> Invitation Accepted PCR Invitation Accepted_PCR Invitation Declined PCR Invitation Rescinded PCR</div> <div><a href="#">Selection details</a></div>

So, you can see there is one Candidate of John Doe's in the TCR:

### HR action activity

Sorted by Auto req ID

Auto req ID:	426BR			
Title	Agency	Location/Division	M	
Sample TCR - Forestry			Doe9, John	
Candidate name	Date loaded	Total days	0-Filed	Invitation Accepted
Candidate B, Sample	22-Dec-2011	10	22-Dec-2011	22-Dec-2011
Total candidates	1			





However, that the same information can be seen in a panel. The **My Open Reqs**, scroll down to Sample TCR - Forestry and you can see one Candidate has accepted their Invitation.

<input type="checkbox"/>	Auto req ID	Title	Tot	Invitation Accepted	Find
<input type="checkbox"/>	<a href="#">429BR</a>	Sample Evergreen Req	<a href="#">3</a>	0	C
<input type="checkbox"/>	<a href="#">428BR</a>	Sample MC Req	0	0	C
<input type="checkbox"/>	<a href="#">427BR</a>	Sample Legal Pending Req	0	0	C
<input type="checkbox"/>	<a href="#">426BR</a>	Sample TCR - Forestry	<a href="#">3</a>	<a href="#">1</a>	<a href="#">1</a>
<input type="checkbox"/>	<a href="#">425BR</a>	Sample JSR - Forestry	<a href="#">4</a>	0	<a href="#">1</a>
<input type="checkbox"/>	<a href="#">391BR</a>	Health Extension	<a href="#">4</a>	<a href="#">1</a>	C
<input type="checkbox"/>	<a href="#">298BR</a>	DRoss Test Evergreen Req for RAM	<a href="#">29</a>	<a href="#">12</a>	<a href="#">1</a>
<input type="checkbox"/>	<a href="#">209BR</a>	DRoss JSR Test Req	<a href="#">44</a>	<a href="#">12</a>	<a href="#">1</a>

## 22.2.2: Finding Information in DOVE:

Panels: Real-time information on ...

I need to...	View this Panel
Displays all reqs (JSRs, TCRs, etc) and their current status of being filled or not.	All Open Reqs
View of your reqs that are currently open and able to be nominated to/filled.	My Open Reqs
Displays all JSRs that are currently pending approval (e.g. not open, not able to be nom/fill).	All Reqs Pending Approval
View of your candidates by HR Status	My Candidates
Quick view of campaigns in Social Source	My Social Source Campaigns



## Searching:

I need to find...	Perform this type of search...
Candidates that share a common characteristic ( <i>example: counts of candidates available for certain Assignment Areas</i> )	Candidate Search < Advanced Search (users can use keyword or one of the pre-set search criteria (i.e. City, Employer, etc.)
A specific candidate	Quick Search < Candidate Search
All candidates of a certain HR Status	Candidate Search < Advanced Search (add HR Status to the available fields and select an HR Status to search by, e.g. Invitation Accepted or Application Complete).
All my candidates in my req (including Recruiter Req / JSR / MCR/TCR, etc)	Reqs < View My Reqs
A JSR that is ready to have candidates nominated into it	Req Search < Advanced Search (filter gray bar for PCV Job Specific Req and open reqs)
All JSRs that I'm assigned	Req Search < Advanced Search (filter gray bar for <i>PCV Job Specific Req</i> and use drop-down menu in req team/manager/owner and find your name)
All TCRs that I'm assigned	Req Search < Advanced Search (filter gray bar for <i>PCV Training Class Req</i> and use drop-down menu in req team/manager/owner and find your name)



## Reports:

I need to find...	Standard Reports
HR Status of candidates in DOVE for this quarter or year (historical)	HR Action Activity
Which candidates are in what HR Status and/or req	Talent Pipeline

These reports are highlighted in this section because they are the most frequently used.

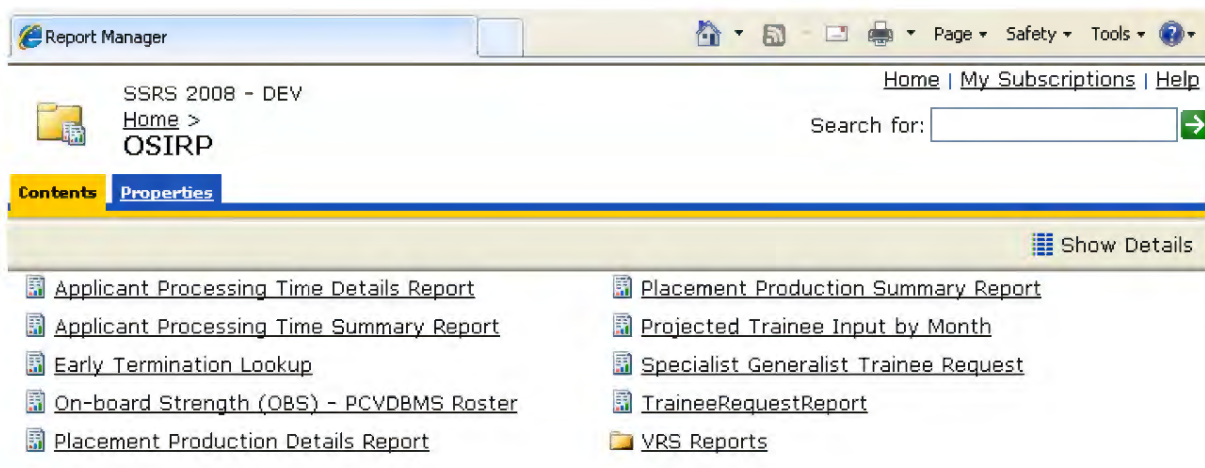
Panels, searching, and options from the Reqs tab (e.g., My Reqs) offer faster ways for users to gather information on candidates, reqs, HR Statuses, or other aspects of candidate processing. Using the above as a guide offers strategic guidance on how to make their candidate processing and tracking more efficient in DOVE. The takeaway from this section is that there are quicker and easier ways to get the breadth of info in DOVE from panels, then search, but least reporting.



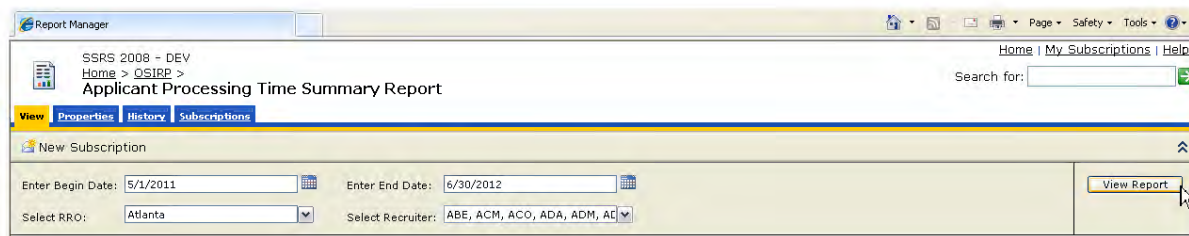
### 22.2.3: How to get information not in a Standard Report or Search or Panel?

To obtain information not in a Standard Report or Search or Panel....See Inside Peace Corps and consume reports there within the Report Manager.

<http://dc-dev01/Reports/Pages/Folder.aspx?ItemPath=%2fOSIRP>  
[will need to replace this link after go-live]



Select an option from the Report Manager and set the report filters as accustomed. Once filters are set, select View Report.



The report displays in the window below the filters:

RRO	REC CODE	RECRUITER	APP INT COUNT	AVG APP INT DAYS	INT RTN COUNT	AVG INT RTN DAYS	RTN NOM COUNT	AVG RTN NOM DAYS	APP RTN COUNT	AVG APP RTN DAYS	APP NOM COUNT
Atlanta	AEP	P.	31	53.60	31	42.00	22	52.00	31	95.60	22
	AUC	U	26	64.50	26	25.10	16	38.80	26	89.50	16
	BAM	A	97	43.90	92	21.60	75	38.70	92	65.50	75
	BRM	N	78	79.20	78	5.10	60	66.50	78	84.30	60
	DMA	A	90	54.40	88	23.10	60	23.30	88	77.90	60
	ERW	W	81	44.30	80	5.50	70	41.50	80	49.90	70

Export options exist within Report Manager to export to a preferred format (PDF or MS Excel, etc).



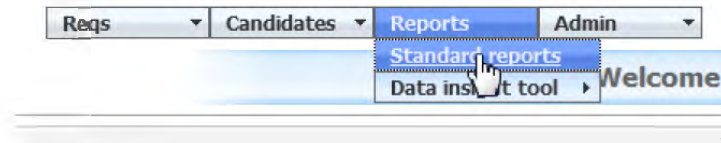
**Note:** If you have a need for a new report....

- Contact System Admin/VDS Analyst.
- Submit a request via our change process and it will get routed appropriately.



## 22.3: Accessing Reporting

To access Reports, go to the top tool bar and select Reports tab. From there most users will have the option of Standard Reports.



The main Reports tab allows you to access Standard Reports (Recruitment, Placement, System Administrators, and VDS Analysts), Business Analytics (Recruitment, Placement, System Administrators, and VDS Analysts), and Data Insight Tool (for System Administrators and VDS Analysts).

## 22.4 Navigating within Reporting

### *Features within Report Tab*

Most users will just see Standard Reports within DOVE's reporting options under the reporting tab. General users will also access to Standard Reports and Business Analytics. Business Analytics offers more visual report options and drill-down to other information. Other options exist for System Administrators and VDS Analysts. These options include: Data Insight Tool.

The benefit of these options is it allows System Administrators and VDS Analysts to drill deeper into the data to help a user or outside manager have more information on an inquiry.

Report Options	Benefits
<b>Standard Reports</b>	Provides general users with a set of standard reports that they can format in a variety of output formats (PDF, MS Excel, etc).
<b>Business Analytics</b>	Provides general users with a means to easily view and format data.
<b>Metrics Panels</b>	Provides similar, simplified versions of Business Analytics reports
<b>Data Insight Tool</b>	Provides a means for System Administrators and VDS Analysts to export data to Excel or other Peace Corps reporting tools, which then makes robust reports available to users





## 22.5: Standard Reports

Standard Reports offer the most options to general users. General users are those users that are neither System Administrators nor VDS Analysts.

### 22.5.1 : Navigating Standard Reports

To navigate to a standard report, select the first option Standard Reports under the Report Tab. Under Standard Reports, there is a menu containing the following types of reports: System reports, Hire/req reports, TRM dashboard reports, and Talent Gateway reports.

Report Groups	Definition
<b>System reports</b>	These reports focus on overall view of DOVE system actives in a variety of area.
<b>Hire/req reports</b>	These reports focus on information related to the status of candidate processing within the req.
<b>TRM dashboard reports</b>	These reports provide high level data summaries of the DOVE system.
<b>Talent Gateway reports</b>	These reports track activities and statistics related to how candidates apply and behave on the agency's talent gateway.

The following are the Standard Reports in DOVE and the user type that will access them in the from **Reports** tab < **Standard Reports** option.

Standard Report	Description	User
HR action activity	This report provides users with a list of candidates at a user-defined HR Status from user-defined timeframes that lists what req the candidate is in. The report can be narrowed by specifying a req manager or owner, candidate first or last name, and/or auto req ID. <b>(Use Often)</b>	<ul style="list-style-type: none"><li>• Recruitment</li><li>• Placement</li></ul>
Talent pipeline	This report generates a list of what candidates are at what HR status and in what req within a user-defined timeframe. The report contains a graph that shows how many candidates are at what HR status within the user-defined timeframe. The report can be narrowed by specifying a req manager and/or owner, candidate first or last name, and/or auto req ID. <b>(Use Often)</b>	<ul style="list-style-type: none"><li>• Recruitment</li><li>• Placement</li></ul>
New hire	This report creates a list of candidates that have successfully completed Onboarding within the user-defined timeframe.	<ul style="list-style-type: none"><li>• Placement (use)</li><li>• Recruitment (access)</li></ul>
Open req activity	This report generates a list of all open reqs for users allowing them to readily identify filled versus unfilled reqs. The list provides req details including the Auto req ID, req name, req Manager and Owner, date the req was opened, number of positions, positions remaining and	<ul style="list-style-type: none"><li>• Recruitment</li><li>• Placement</li></ul>



	candidates in the req.	
Req status summary	This report generates lists of reqs by req status (i.e., opened, accepted, declined, closed, etc.) within a user-defined timeframe.	<ul style="list-style-type: none"> <li>• Recruitment</li> <li>• Placement</li> </ul>
Req history	This report provides users a list of req histories for a user-defined timeframe. The report indicates the date each req was created, approved and/or opened, and the dates of any modifications and who performed each action and when.	<ul style="list-style-type: none"> <li>• Recruitment</li> <li>• Placement</li> </ul>
Source yield	This report lists the percentage of candidates that successfully became Volunteers from a user-defined source(s) and the ratio of Volunteers from a given source versus the total number of Volunteers within the given timeframe. The list can be narrowed to a specific req, Manager or Owner.	<ul style="list-style-type: none"> <li>• Recruitment</li> <li>• Placement</li> </ul>
eLink responsiveness	This report generates a table of the number of eLinks sent, percentage of sent eLinks that were viewed by the recipient, and the percentage of eLinks sent that were responded to in a user-defined timeframe. The table also displays the average time users took to view or respond to eLinks. The report lists the types of eLinks (candidate vs. form) sent, who sent them, why they were sent, if they were viewed and/or responded to, the date sent and the time to respond to the eLink.	<ul style="list-style-type: none"> <li>• Recruitment</li> <li>• Placement</li> </ul>
Site activity	This report documents the number of candidates that were entered into DOVE and how that candidate came to be in DOVE. <i>Not visible to Placement.</i>	<ul style="list-style-type: none"> <li>• Recruitment</li> </ul>
Candidate activity	This report generates a list of e-mail addresses of specific groups of candidates. Groups of candidates are determined based on user-defined criteria. This report exports to excel to allow for easy mass e-mails. <i>Not visible to Placement.</i>	<ul style="list-style-type: none"> <li>• Recruitment</li> </ul>

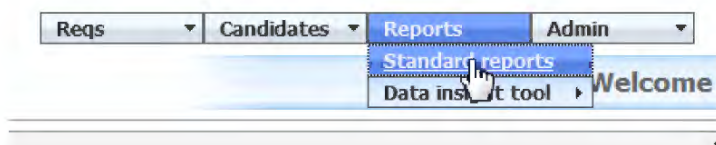


## 22.6: Running a Standard Report

*Running a report involves the following steps.*

1. Opening the Standard Reports menu
2. Selecting the desired report
3. Filtering the report based on dates or other factors
4. Selecting the output format
5. Generating the report
6. Viewing the report

### 1. Opening Standard Reports menu by going to Reports tab < Standard Reports



### 2. Select the desired report by viewing the options

For Placement, the following options appear as:

**Standard reports menu**

Help	Run	Report	Description
?		<a href="#">HR action activity</a>	This report provides information on candidates as they move through the hiring process.

**Hire/req reports**

Help	Run	Report	Description
?		<a href="#">New hire</a>	This report represents detailed information on new hires, including source information.
?		<a href="#">Open req activity</a>	This report provides information on all reqs with an open status as of a specific date.
?		<a href="#">Req status summary</a>	This report presents information on status changes of requisitions.
?		<a href="#">Req history</a>	This report provides req action detail and history. It includes effective dates and days elapsed between actions.

**TRM dashboard reports**

Help	Run	Report	Description
?		<a href="#">Diversity hires</a>	This report presents a breakdown of your diversity hiring activity based on your definition of a "diversity hire."
?		<a href="#">Source yield</a>	This report presents the yield in candidate volume, views, and ultimate hires produced.
?		<a href="#">Talent pipeline</a>	This report provides an overall snapshot of your current Talent Pipeline as defined by HR status in your Kenexa Recruiter BrassRing database.
?		<a href="#">eLink responsiveness</a>	This report provides details on the number of eLinks sent which are then viewed and responded to from their recipients.



For Recruitment, the following options appear as:

The screenshot displays the VDS Recruitment system interface. At the top, there is a navigation bar with tabs for 'Reqs', 'Candidates', 'Reports', and 'Admin'. The 'Reports' tab is selected. Below the navigation bar, a 'Welcome VDS Recruitment' message is visible. To the right of the welcome message, there are links for 'URC', 'Home', 'Logoff', and 'Se'. Below the navigation bar, there is a search bar with 'Search Candidates' and 'Search Reqs' options. The main content area is titled 'Standard reports menu' and contains several sections of reports:

- System reports**
  - HR action activity**: This report provides information on candidates as they move through the hiring process.
- Hire/req reports**
  - New hire**: This report represents detailed information on new hires, including source information.
  - Open req activity**: This report provides information on all reqs with an open status as of a specific date.
  - Req status summary**: This report presents information on status changes of requisitions.
  - Req history**: This report provides req action detail and history. It includes effective dates and days elapsed between actions.
- TRM dashboard reports**
  - Source yield**: This report presents the yield in candidate volume, views, and ultimate hires produced.
  - Talent pipeline**: This report provides an overall snapshot of your current Talent Pipeline as defined by HR status in your Kenexa Recruiter Brassring database.
  - eLink responsiveness**: This report provides details on the number of eLinks sent which are then viewed and responded to from their recipients.
- Talent Gateway reports**
  - Site activity**: This report returns activity statistics for the selected Gateway site(s), or for specific requisitions posted to Gateways.
  - Search agents**: This report generates statistics for search agents that were created on the job hosting sites.
  - Candidate activity**: This report generates e-mail addresses of specific active and passive candidate pools. This report exports to excel to allow for easy mass e-mails.
  - Req activity**: This report provides statistics on the number of reqs posted to job hosting sites during the selected date range. It also provides posting date information on a per req basis.

Recruitment has one more type of reports than Placement, Talent Gateway Reports. These reports are focused for those related to the Talent Gateway (as there is only one posting to Talent Gateway, the Evergreen Req).



**3. Filtering the report based on dates or other factors.** Filters open once a user selects the desired report. Select filter (date range) by selecting options from the report window.

The screenshot shows a web interface for 'HR action activity'. At the top, a grey header bar contains the text 'HR action activity'. Below this is a yellow banner with the text 'This report provides information on candidates as they move through the hiring process.' The main section is titled 'Select date range' and contains a list of radio button options: 'Begin date', 'End date', 'Month to date', 'Previous calendar month', 'Calendar quarter to date', 'Previous quarter (for equivalent time period)', 'Previous quarter (all)', 'Calendar year to date', 'Previous year (for equivalent time period)', and 'Previous year (all)'. To the right of the first two options are three dropdown menus and a calendar icon. Below the list of options is a horizontal line, and underneath it is the text 'Refine your query by selecting from the filtering options below.'

*Filtering options window may change based on report.*

Many report types include the filter options that use the default All. You can generate reports by accepting these defaults, or you may refine your query using the dropdown list to highlight a selection. You can highlight multiple selections for each filter by using the [CTRL] key.

Typically, you need to select only one filter option to report on all information about your selection(s). The report will display all open reqs for that filter criteria (the HR status, managers, owners, req team).

To generate a report on one manager, highlight the manager's name and accept all other defaults. The report will display all open reqs associated with that manager, including location(s), department(s) and recruiter(s).

These filter options are derived from fields on the Req Form. Since these fields are customizable, they will reflect the labels specified by DOVE system administrators. This will also be true when Location and Department, as well as Manager and Owner appear as sorting options and column headings. Similarly, the sorting option Job Title and applicable column heading will reflect your company- specified label.



This filter report window lets you select the following options to tailor a report. This window is based on the **HR Action Activity Report**.

Report Field	Description	Selection Options
*Select Date Range	Select one of the radio buttons and enter dates to filter report based on date.	<ul style="list-style-type: none"> <li>• Begin date</li> <li>• Month to date</li> <li>• Previous calendar month</li> <li>• Calendar quarter to date</li> <li>• Calendar quarter to date</li> <li>• Previous quarter (for equivalent time period)</li> <li>• Previous quarter (all)</li> <li>• Calendar year to date</li> <li>• Previous year (for equivalent time period)</li> <li>• Previous year (all)</li> </ul>
*Agency	This defaults to All.	All
*Location/Division	This defaults to All.	All
*Manager	This is a list of all managers related to the report. This is a multi-select field. Use the [CTRL] key to select multiple options.	Staff list of managers
*Owner	This is a list of all owners related to the report. This is a multi-select field. Use the [CTRL] key to select multiple options.	Staff list of owners
HR status (sample of field used in HR action activity to tailor report)	This is a list of all HR Statuses. Note that this includes PCV and PCR HR Statuses. Make sure to select the right field. This is a multi-select field. Use the [CTRL] key to select multiple options.	All HR Statuses. Note: These are in alphabetical order, not workflow/candidate processing order.
Candidate first name	Type in the Candidate's first name	Fillable by user
Candidate last name	Type in the Candidate's last name	Fillable by user
Auto req ID	Type in the auto req ID or select List to see all reqs. Users can select more than one auto req ID to add to the report. This window also allows you to search for an auto req ID based on criteria.	<p>Select or search for appropriate auto req ID. For List, use &lt;&lt; or &gt;&gt; to position the right auto req ID into the selected options. Once complete, select OK.</p> <p>Within this field, the popup window will allow you to select multiple reqs to view in the report. Also, users will see two radio buttons. Code: Description and Description: Code. Keyword searching also available (See screenshot below).</p>
*Select an output format	There are many options for how to display a report. Select one based on your need to just view or need to analyze further. Using an MS Excel or tab delimited option (.csv) will offer more flexibility with the data. Using Formatted Excel, however, is preferred due to its compatibility with Peace Corps formatting options.	<ul style="list-style-type: none"> <li>• Acrobat (.pdf)</li> <li>• Excel Sortable (.xls)</li> <li>• Formatted Excel (.xls)</li> <li>• Extensible Markup (.xml)</li> <li>• Image File (.tiff)</li> <li>• Office Web (.mhtml)</li> <li>• Tab Delimited (.csv)</li> </ul>



**For filters, which support multiple selections, use the [CTRL] key to select multiple options.**

The table above shows some but not all filters you may see in a standard report.\*Standard fields for most reports noted with the black asterisk.





Auto Req ID (pop-up window) to Search Form:

The screenshot shows the 'Search form' window. At the top, there is a search bar with the text 'Enter search criteria' and a 'Search' button. Below the search bar are two radio buttons: 'Starts' (selected) and 'Contains'. The main area is divided into two columns: 'Available options' on the left and 'Selected options' on the right. The 'Available options' list contains 17 items, including '100BR: General Construction', '104BR: Ag Extension', '105BR: TCR - Kenya', '106BR: Married Couples', '108BR: Unique Skill', '11BR: Peace Corps Volunteer', '134BR: PCV GQ 1.1 TEST REQ', '137BR: Legal Review', '140BR: Hygiene Ed/Water Sanitation', '141BR: Ag Extension', '142BR: Business Advising', '143BR: Kenya Q3 2012', '145BR: Married Couples', '148BR: Primary Education Teacher Trainer', '15BR: Unique Skill', '172BR: Business Advising', '173BR: Secondary Ed English Teacher', and '174BR: University English Teacher'. Between the two columns are two buttons: '>>' and '<<'. At the bottom, there is a 'Selection details' section with three buttons: 'OK', 'Reset to saved', and 'Cancel'. Below these buttons are two radio buttons: 'Code: Description' (selected) and 'Description: Code'.

Selecting the **Code: Description** as above shows in numerical order the reqs.

The screenshot shows the 'Search form' window. At the top, there is a search bar with the text 'Enter search criteria' and a 'Search' button. Below the search bar are two radio buttons: 'Starts' (selected) and 'Contains'. The main area is divided into two columns: 'Available options' on the left and 'Selected options' on the right. The 'Available options' list contains 20 items, including '1271 BR: 402BR', 'Ag Economics: 188BR', 'Ag Economics: 189BR', 'Ag Economics: 242BR', 'Ag Extension: 104BR', 'Ag Extension: 141BR', 'Ag Extension: 178BR', 'Ag Extension: 192BR', 'Ag MI Q3 FY13: 303BR', 'Business Advising: 142BR', 'Business Advising: 172BR', 'Business Advising: 179BR', 'Business Advising: 185BR', 'Business Advising: 186BR', 'Business Advising: 264BR', 'Business Development: 187BR', 'Business Development: 20BR', and 'CAP Test-Forestry: 331BR'. Between the two columns are two buttons: '>>' and '<<'. At the bottom, there is a 'Selection details' section with three buttons: 'OK', 'Reset to saved', and 'Cancel'. Below these buttons are two radio buttons: 'Code: Description' and 'Description: Code' (selected).

Selecting the **Description: Code** (see below) shows it in alphabetical order. This is most useful when trying to find a specific AA or Country (TCR).



A third option is to do a keyword search....

#### 4. Select output format.

Select an output format

Reports can be formatting in several different outputs:

- Acrobat (.pdf)
- Excel Sortable (.xls)
- Formatted Excel (.xls)
- Extensible Markup (.xml)
- Image File (.tiff)
- Office Web (.mhtml)
- Tab Delimited (.csv)



Most reports will just need to be viewed, PDF formatting offers that utility. Formatted Excel is the best option for performing edits, additional calculations, and making charts, etc.



**5. Generating the Report:** Once you have selected your output format, then **select Generate Report now** to execute the report. This row in the filter window also allows users to clear (the filter), cancel (the report), and schedule (a report).

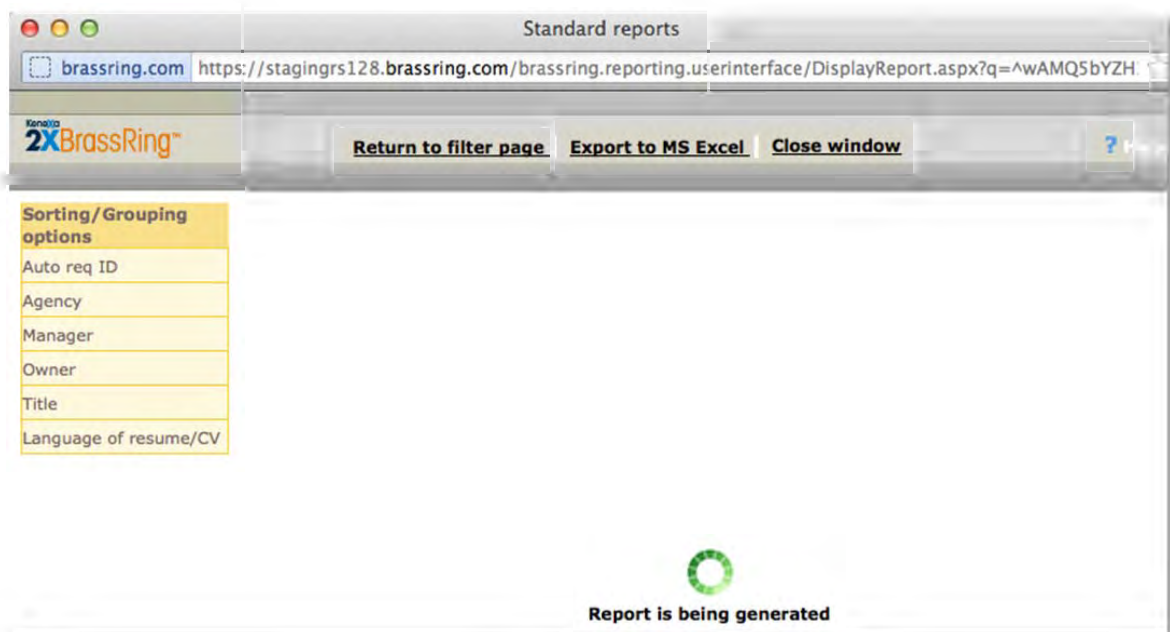


- The **Clear** option will clear the filter criteria.
- The **Cancel** option will close the report. Cancel closes the report without saving the selections.
- Please ignore the **Schedule report** option.

## 6. Viewing the reports

In viewing Reports, Candidates will now be called Applicants. Depending on what you want to do with a report, the output format will determine how much you can format or just view the information. To preview the report and make sure the right report is generated, view first as Acrobat (PDF). Users can always export to MS Excel after viewing.

While the report loads, the following Standard reports window opens first. See the middle option to **Export to MS Excel**. The PDF loads in this window. This window has additional options.





This window allows the following options:

Option	Description
<b>Return to filter page</b>	This allows users to return to the filtering options for the report
<b>Export to MS Excel</b>	This allows users to export the file from their current output format selection to MS Excel
<b>Sorting/Grouping options</b>	This allows additional options for the data based on sorting or grouping the Auto req ID, Agency, Manager, Owner, Title, and Language of resume/cv
<b>Close Window</b>	This closes the window. If users have the report they want, this ends the inquiry. If they want to select another report and filter options, they must return to the Reports tab > Standard Reports

### *Sorting/Grouping Options*

The Sorting and grouping options appear in an Options panel to the left of the PDF report screen.

These selections allow you to resort the current report by the selected options, yielding different perspectives from which to analyze the report. Sorting and grouping options will vary depending on the report. The example below illustrates the sorting and grouping options for the Hire/Req report.

Most reports, but not all, have alternative sorting and grouping options. To view different sorting results, click on the desired sorting or grouping option. The report will redisplay the results sorted by the option selected. For example, by clicking on Recruiter (see below), the System user report is resorted by recruiter name.

The selected Sort By: option (Recruiter) appears immediately below the report name. Also note that the letter in the title of the PDF navigation pane, Bookmarks tab, corresponds to the letter in front of the Recruiter sorting option (in this example "E" is the sorting option).

Sorting Options	Description
Auto Req ID	Req number and req type
Agency	Peace Corps
Location/Division	Department
Manager	Manager of req
Owner	Owner of req
Title	Title of req



## 22.7: Viewing a Standard Report

There are two recommended ways to view reports as Acrobat (.pdf) or Formatted Excel (.xls)

Below shows the HR action activity report in PDF.

*The following is how the HR action activity report loads in PDF. Note that this report shows all those in the Evergreen Req (98BR).*

### HR action activity

Sorted by Auto req ID

From: 1-Apr-2012 to: 11-Apr-2012

\* = Based on data security privileges, this field is not available for output.

Auto req ID:

98BR

Title	Agency	Location/Division	Manager	Owner
Peace Corps Volunteer		*	Support (carter), BrassRing	Support (carter), BrassRing

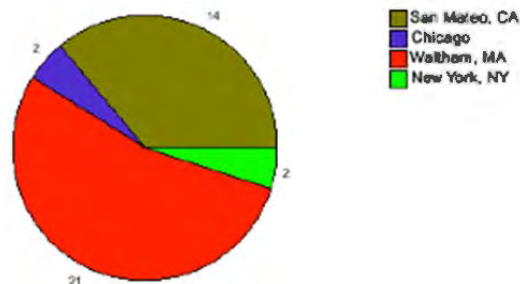
  

Candidate name	Date loaded	Total days	O-Filed	Application Complete
Brown, Sally	9-Apr-2012	3		9-Apr-2012
Doyle, Susan	10-Apr-2012	2		10-Apr-2012
Fultest, CNOM	9-Apr-2012	3		9-Apr-2012
Fultest, DisinviteA	9-Apr-2012	3		9-Apr-2012
Fultest, DisinviteB	9-Apr-2012	6		9-Apr-2012
Fultest, GoldenNVR	9-Apr-2012	6		9-Apr-2012
Fultest, GoldenNVR	11-Apr-2012	1		11-Apr-2012
Fultest, Husband	9-Apr-2012	3		9-Apr-2012
Fultest, MedHold	9-Apr-2012	6		9-Apr-2012
Fultest, NILEg	9-Apr-2012	3		9-Apr-2012
Fultest, NIPO	9-Apr-2012	3		9-Apr-2012
Fultest, NIRC	9-Apr-2012	6		9-Apr-2012
Fultest, STRAT	9-Apr-2012	3		9-Apr-2012
Fultest, Wife	9-Apr-2012	3		9-Apr-2012
Jones, Indiana	9-Apr-2012	3		9-Apr-2012
Kyle, Jess	25-Aug-2011	231	25-Aug-2011	9-Apr-2012
Total candidates	16			

Some reports allow for graphic displays. Pie charts or bar charts are available for some of the reports. Typically, the charts are displayed on either the first or last page of report results. Bar charts and pie charts, as shown in the following example, are useful for interpreting results.

### New Hires

Sort By: Location












**Note:** It may be difficult to interpret reports with large data sets using pie or bar charts. Using selected filters, for example, limiting date range or number of locations, will help produce more meaningful results.



## 22.7.1: Viewing in PDFs

The PDF report contains options of things to do within the PDF Tool Bar. The task toolbar displayed in the PDF section of the report provides common PDF icon functionality. The most common functions used with Standard reports are listed below. For a complete description of PDF functions, see the standard Adobe Acrobat Reader help files.

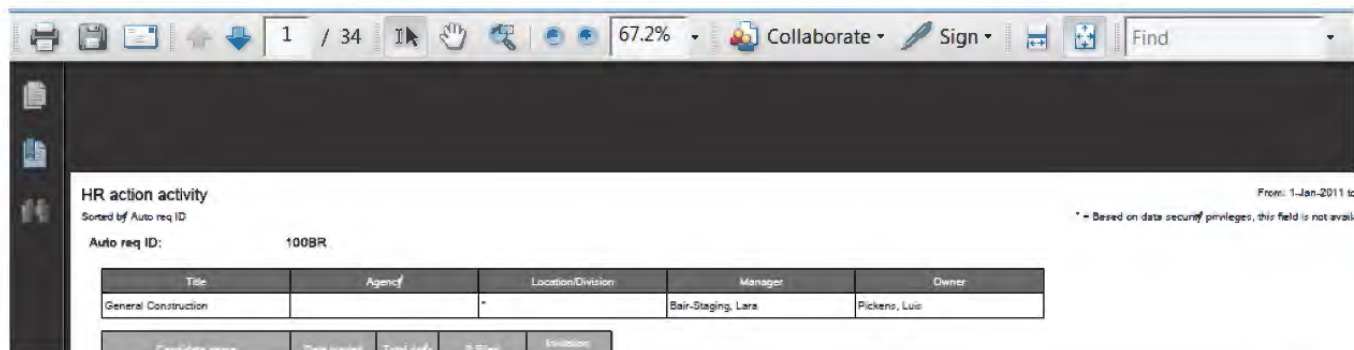
Icon	Icon Name	Description
	Save	Save report results in PDF format.
	Printer	Print report results to your assigned default printer.
	Navigation pane	Hide or display the Adobe navigation pane. Initial presentation of report results displays with the navigation pane displayed.
	Zoom-In tool	For easier viewing, select the Zoom-In tool, then click on the report to increase magnification.  To decrease magnification, press and hold the <b>[Ctrl]</b> key, when using the tool.
	Magnification tool	Use the Magnification tool located in the status bar (bottom of page) to increase or decrease magnification. This is an alternative to the Zoon-In tool.
	First Page/ Previous Page Next Page/Last Page	Use page icons to view report results.
	Scroll	Scroll between views.
	Resize	Resizes report to fit in window.
	Find	Search for specific information within the report.

**Note:** Positioning the cursor over PDF toolbar icons displays screen tips that describe icon actions.





Within the pdf, you will see some of the above options, but also these additional options:



#	Option	Description
1		Print
2		Save
3		E-mail
4		Page up/Page Down
5		Select text
6		Hand tool – move through document
7		Marquee Zoom tool – select content and zoom an area of the page or click and zoom entire page
8		Decrease/Increase page zoom
9		Zoom percentage
10		Collaborate – this is an option of advanced Adobe products. It allows PDFs to be shared. <b>Ignore this</b>
11		Digitally Sign – this is an option of advanced Adobe products. This option allows a digital signature to be added to a pdf. <b>Ignore this</b>
12		Fill page to window and scroll continuously
13		Scroll one page at a time
14		Find – allows a user to search the document for a certain word or phrase
15		Thumbnail – this option displays the pages and users can select a certain page from the displayed preview picture of a page.
16		Bookmark – this shows the reqs in order of display. Users can select a req number and go to the page with that content.
17		Search – this allows users to perform a search

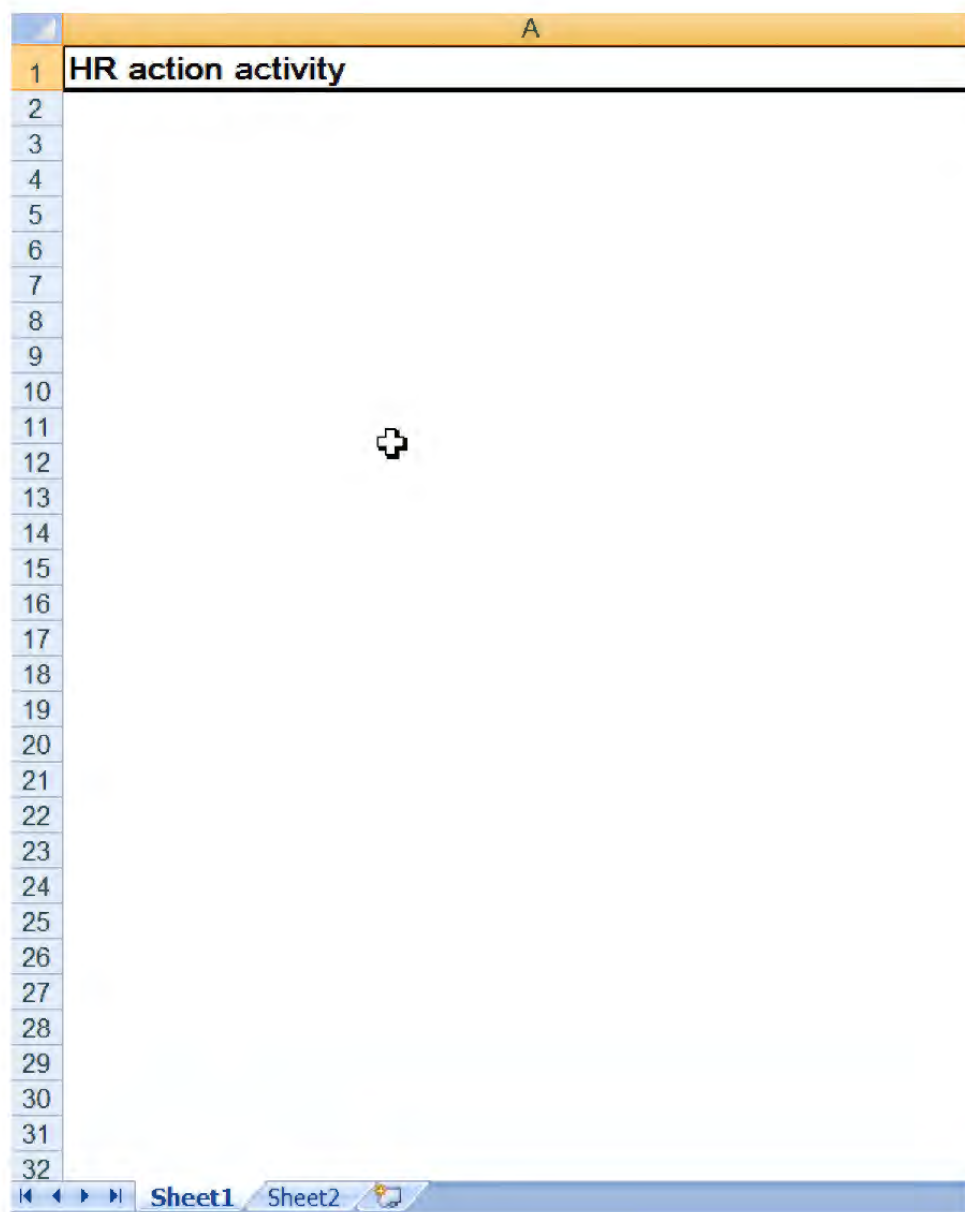


### 22.7.2: Viewing in Excel

Once a user selects the output format of Excel and generates the report. The report can either be saved and opened later or opened upon generating the report.

It is recommended to use the Excel Sortable (.xls) format for viewing in Excel.

Sheet 1 is the first spreadsheet that appears. This is the title slide.





Sheet 2 contains the report details. This can be formatted from here however the user would like using tools within Excel.

	A	B	C	D
1	Auto req ID	Title	Agency	Location/Division
2	98BR	Peace Corps Volunteer		*
3	98BR	Peace Corps Volunteer		*
4	98BR	Peace Corps Volunteer		*
5	98BR	Peace Corps Volunteer		*
6	98BR	Peace Corps Volunteer		*
7	98BR	Peace Corps Volunteer		*
8	98BR	Peace Corps Volunteer		*
9	98BR	Peace Corps Volunteer		*
10	98BR	Peace Corps Volunteer		*
11	98BR	Peace Corps Volunteer		*
12	98BR	Peace Corps Volunteer		*
13	98BR	Peace Corps Volunteer		*
14	98BR	Peace Corps Volunteer		*
15	98BR	Peace Corps Volunteer		*
16	98BR	Peace Corps Volunteer		*
17	98BR	Peace Corps Volunteer		*
18	98BR	Peace Corps Volunteer		*
19	100BR	General Construction		*
20	105BR	TCR - Kenya		*
21	138BR	Chicago RRO		*
22	140BR	Hygeine Ed/Water Sanitation		*
23	140BR	Hygeine Ed/Water Sanitation		*
24	140BR	Hygeine Ed/Water Sanitation		*
25	140BR	Hygeine Ed/Water Sanitation		*
26	145BR	Married Couples		*
27	146BR	Atlanta RRO		*
28	150BR	New York RRO		*
29	151BR	San Francisco RRO		*
30	156BR	BRO - Recruiter 1		*
31	158BR	CRO - Recruiter 1		*

Sheet1 Sheet2

Once the report is saved to the appropriate location, users can rename the sheets so that it meets their needs.





## 22.8: Data Insight Tool

Data Insight Tool or DIT is a tool for System Administrators and VDS Analysts to extract data to be used for custom reports.

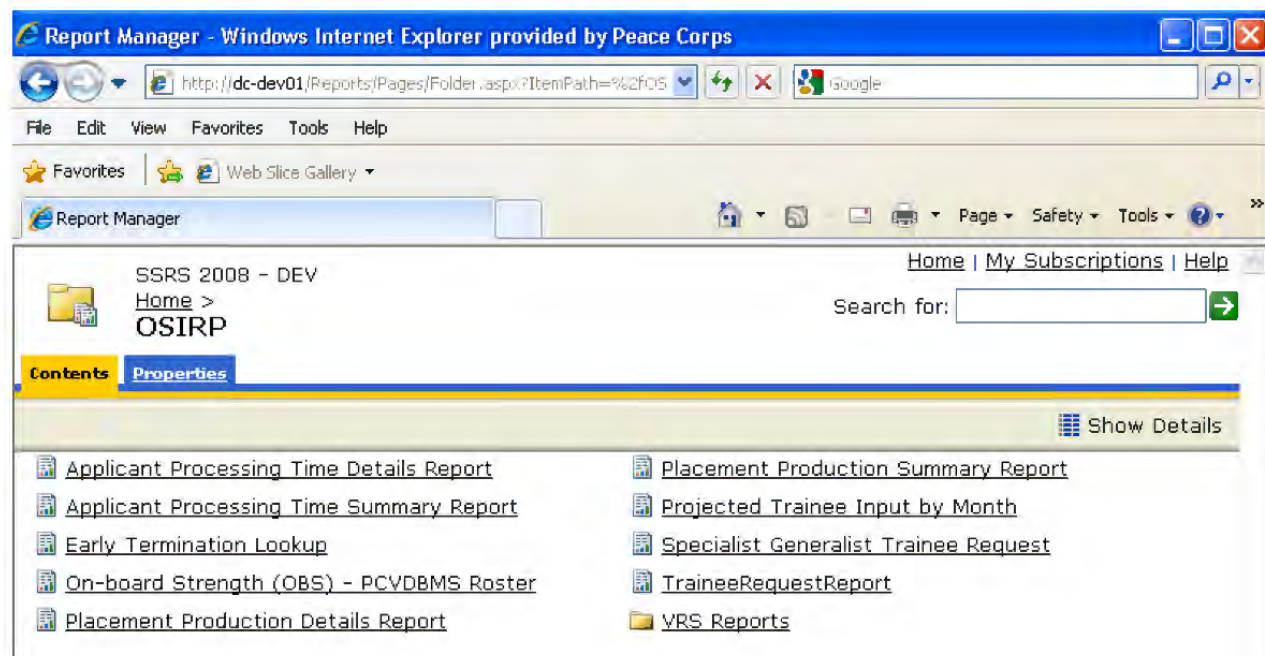
DIT allows System Administrators and VDS Analysts to:

- (1) Create templates that can be run and extract data
- (2) Create custom data feeds used to populate existing Peace Corps reporting tools outside DOVE
- (3) Have data visible by managers that is not available in Reports tab (DOVE)

General users will be able to have access to DIT information via Inside Peace Corps and/or contacting the a VDS Analyst or System Administrator.

For more info on DIT, see section 22.10: Other Reporting Resources.

**Report Manager** is where OSIRP will make reports available to DOVE users who cannot create or view certain information within searches, panels or standard reports (see section see section 22.2.3: How to get information not in a Standard Report or Search or Panel?). .





## 22.9: Business Analytics

Business Analytics (BA) is tool that allows users to perform deeper analysis on data and view visualizations of the data quickly.

The features of Business Analytics include:

- Interactive design
- Lock filters
- Drill down data table
- Export and Print data from the UI
- Maximize and Minimize data tables
- Intuitive interface
- Quickly display charts & graphs
- Rapid Implementation

### Key Terms:

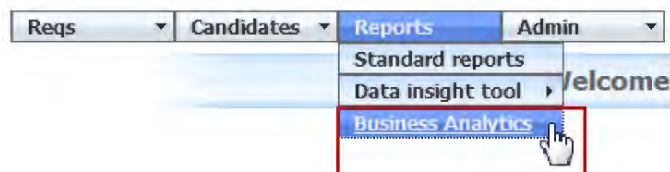
Term	Definition
Program Area	This refers to the assignment areas referenced in DOVE.
Country	This refers to the Posts candidates will be invited to serve at as Volunteers.
RRO	This refers to the regional recruitment office (e.g. Atlanta RRO)
Region	This refers to the three main regions Africa, EMA, and IAP.
Pipeline	This is a term used throughout BA it refers to the candidate processing. Count of the number of candidates filed to Req folders, etc.
Pipeline Cycle Time	Average number of days that candidates have spent in selected non-final HR Statuses. It includes only those candidates who are assigned to requisition folders and who have entered and exited the status during the selected time period.
Source Yield	Count of the number of candidates or hires from each Source during the selected period (Source is customer-defined in Workbench). System will display the first 10 items in the legend. Addition items are included in "Others". Items below 0.1% will also be displayed in "Others". Customer can drill down into "Others" by clicking on the legend category.
Source Comparison	Count of Non-Hires and Hires from each Source during the selected period (Source is customer-defined in Workbench, similar to the Source Yield metric). The Hires data is a count of the candidate that reached the customer defined HR Status of Hired (customer defined in Workbench).
Hire Analysis	Count of hires in the selected period, grouped by Addition or Replacements. Metric will use the same "hired" status as the time-to-fill metric, and uses the selected requisition type field to determine if it was a replacement or addition





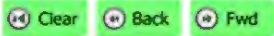




## 22.9.1: Accessing Business Analytics

Users will access Business Analytics from the Reports tab.






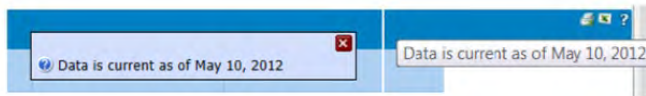
Once the tab for Business Analytics is selected, Business Analytics will open in a new window (see below).



#	Option	Description
1	Metric Filter	This option allows users to select which metric to display in the source yield window (e.g. EEO Pipeline).
2	Scan button 	Using clear, back, or forward allows users to advance in the data timeline.
3	Export to PDF 	This option allows users to export information to PDF. This makes e-mailing data easier.
4a	Search 	This allows the user to Search the Program Area, Country, or Region.
4b	Select All 	This allows the user to select all options in the Program Area, Country, or Region.
4c	Lock 	This allows the filter to be locked while other options are set. This option is only available for the Region.
5	Program Area	This refers to the assignment areas referenced in DOVE. Users can select the program area to display information related to that feature.
6	Country	This refers to the Posts candidates will be invited to serve at as

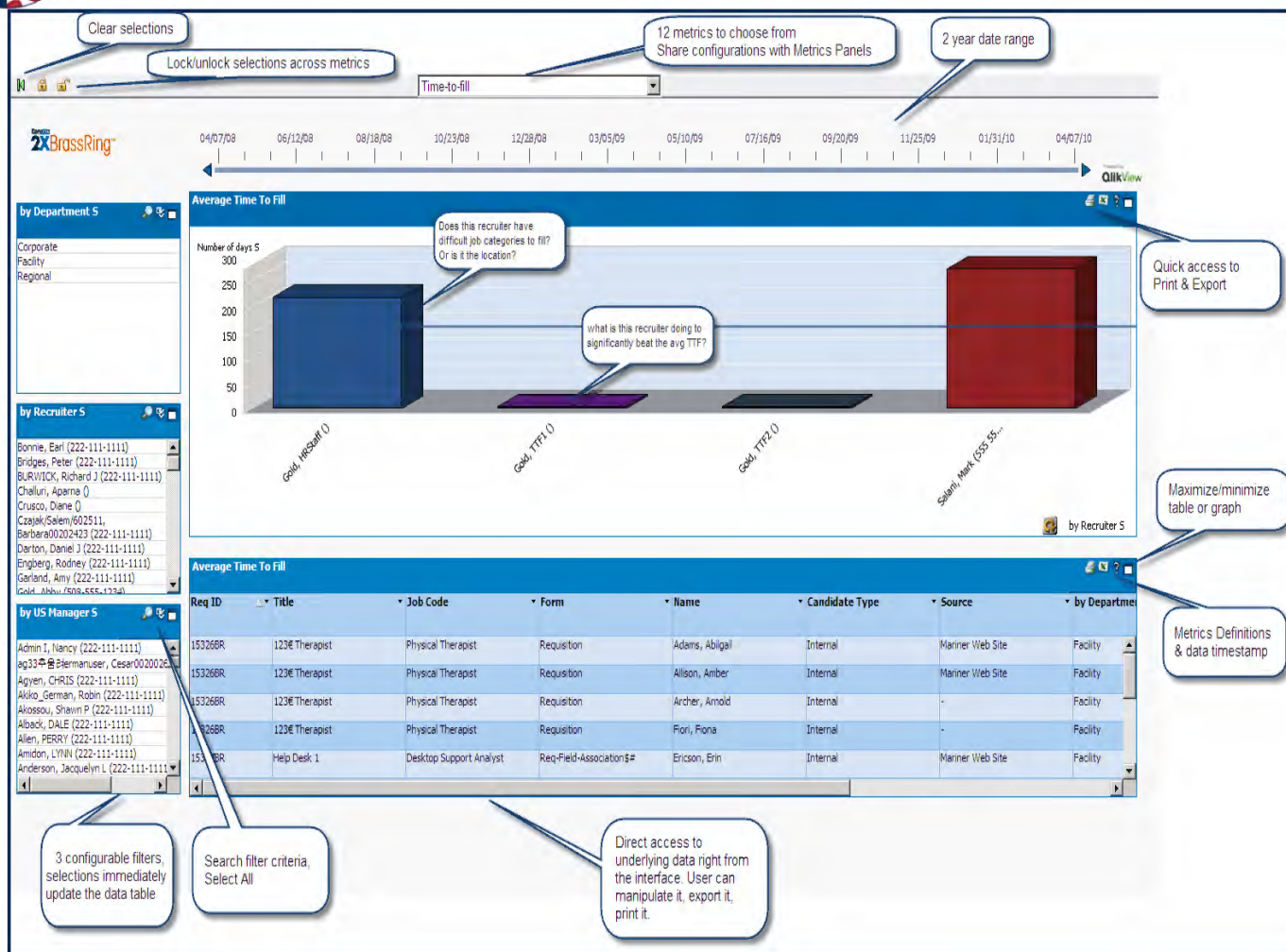




#	Option	Description
		Volunteers. Users can select the country to display information related to that feature. (This could be RRO when system is set / update table when update)
7	Region	This refers to the three main regions Africa, EMA, and IAP. Users can select the region to display information related to that feature.
8	Data timeline	This is a timeline of the display of the metrics
9	Source Yield	This displays information in graphic form based on the data source selection.
10	Source Yield (table)	This displays information in a table form. Data displayed includes: Name, HR Status, Program Area, Country, and Region.
11a	Print 	This allows the data to be printed.
11b	Send to Excel 	This allows data to be sent (viewed) to MS Excel.
11c	Information 	<p>This question mark icon shows how current the data is that is being displayed.</p> 

### 22.9.2: Using Business Analytics [Update]

1. Business Analytics allows the following: Users will be able to select a metric filter (1 above)
2. Then, they can change the Program Area, RRO, or Region from the left options (5,6, and 7 respectively).
3. The data displays in the Source Yield (9 and 10) sections.
4. The displayed data gives a quick view of the content. Users can also export the data (section 3).
5. Another metric can be looked at by simply selecting from the metric filter.



Business Analytics, however, has these known limitations:

- Both active and inactive data is displayed
- Cannot yet save filter selections for future sessions
- All data is available to those who have privilege to access the metrics. Does NOT follow 2xBrassRing security or access rules.
- Minor lag experienced during refresh of page with large amounts of data: Depending upon the amount of data stored, user may need to wait a few seconds for data to refresh in the page, following any changes in selections or while searching within a filter box.
- While scrolling across the data table, there may be a lag for the header to adjust to the column data. If column headers become disconnected from the rest of the column, user can press F5 to refresh the view, and scroll again.
- CTRL + MouseWheelDown (to zoom in or out of the page) is not supported.
- When exporting or printing a metric that uses Date Range, the date range that was selected is not available in the export/print. If desired for the report, the user must add it manually.



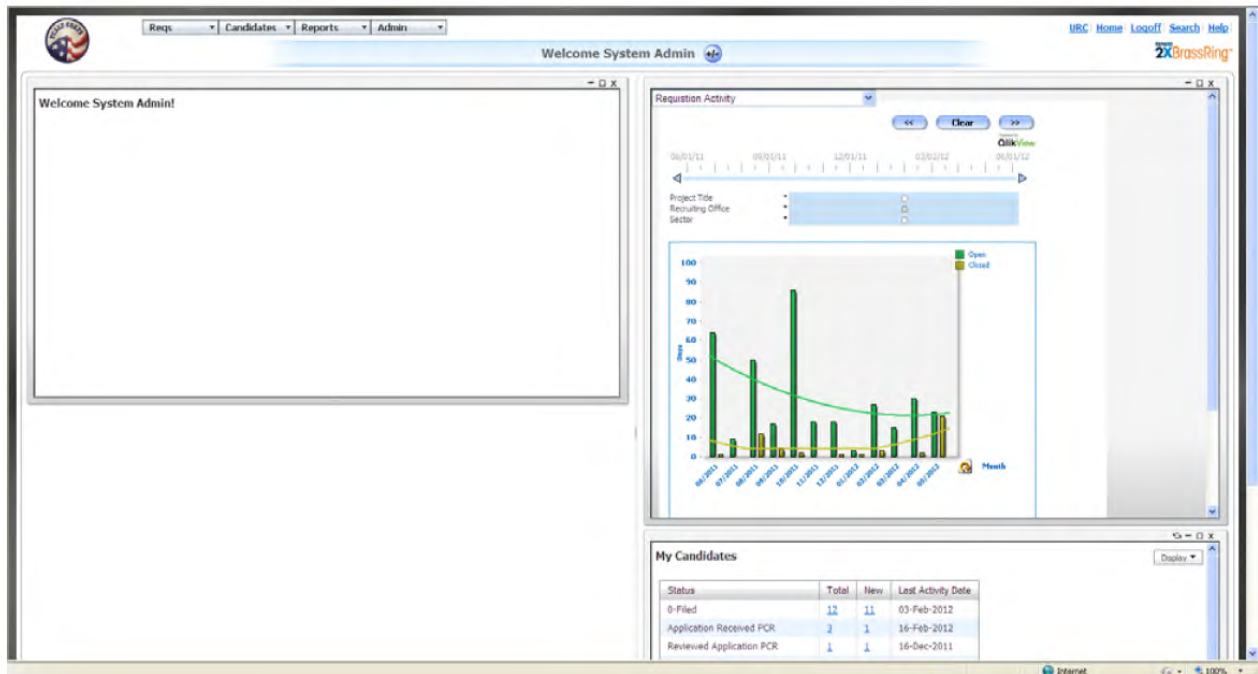
### 22.9.3: Key Reports in Business Analytics

Report	Description	User
<b>Requisitions</b>		
Requisition Status	Count of Requisitions that are in specific Req Statuses on the selected day.	<ul style="list-style-type: none"><li>• Recruitment</li><li>• Placement</li><li>• VDS Analyst</li></ul>
Requisition Age	Average age (in days) of all open requisitions that are open during the selected time period, where age is calculated by taking the total days a requisition has been open less the days on hold. DateReqPosted is the date of the earliest posting (the earliest date that the req was opened).	<ul style="list-style-type: none"><li>• Recruitment</li><li>• Placement</li><li>• VDS Analyst</li></ul>
<b>Candidate Pipeline</b>		
Pipeline Volume	Count of the number of candidates in the selected HR Statuses on the selected dates (includes only candidates assigned to requisition folders).	<ul style="list-style-type: none"><li>• Recruitment</li><li>• Placement</li><li>• VDS Analyst</li></ul>
Pipeline Cycle Time	<i>Average number of days that candidates have spent in selected non-final HR Statuses.</i> It includes only those candidates who are assigned to requisition folders and who have entered and exited the status during the selected time period.	<ul style="list-style-type: none"><li>• Recruitment</li><li>• Placement</li><li>• VDS Analyst</li></ul>
Pipeline Conversion	<i>This report displays those who have moved out to a negative disposition status.</i> A high number of candidates moving to a positive disposition from any status means candidates are not being screened out at that step. A lower number means more candidates are being screened out at that step. The system uses the same HR Statuses as the Pipeline Volume metric, with “negative disposition” statuses as designated by your Analytics administrator in Workbench. The metric includes only those candidates who are assigned to requisition folders.	<ul style="list-style-type: none"><li>• Recruitment</li><li>• Placement</li><li>• VDS Analyst</li></ul>



## 22.9.4: Metric Panels

Metric Panels are a subset of Business Analytics. They contain simplified views into the same reports that Business Analytics show. Delivered on the welcome screen, they provide quicker access to this information in a way that still allows for some filtering and drilling down in a visual manner.





## 22.10: Other Reporting Resources

Additional Resources exist on reporting in DOVE.

Reporting Options	Location	Description
Standard Reports	(insert sharepoint link)	Content from source vendor, Chapter 14, Standard Reports
Data Insight Tool	(insert sharepoint link)	Content from source vendor, Chapter XYZ, Data Insight Tool
Metric Panels	(insert sharepoint link)	Content from source vendor, Chapter XYZ, Metric Panels
Business Analytics	(insert sharepoint link)	Content from source vendor, Chapter XYZ, Business Analytics



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## Appendix A-: Glossary, Legends, Buttons & Icons

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### Appendix A:

- Appendix A-1: Glossary
- Appendix A-2: Legend
- Appendix A-3: Buttons & Icons

#### A-1: Glossary

Term	Definition
Auto Req ID	The unique, auto-generated number assigned to each requisition in DOVE upon completion of creating the requisition. An example of an auto req ID is 123BR.
Active	A country status applied to a country with currently serving Volunteers and/or trainees, and active Peace Corps staff. A country is active on the date the first trainees arrive or return if the country was suspended.
Africa (AFR)	One of three Peace Corps-defined regions where Peace Corps conducts overseas projects. The Africa region is defined by the countries and islands of the Sub-Saharan African continent.
Applicant	A person who has submitted an application to become a Peace Corps Volunteer. The phases in the Volunteer Lifecycle are subdivided into applicant, nominee, invitee, trainee, and volunteer.
Application	Information provided by a prospective volunteer to the Peace Corps to initiate the process of becoming a volunteer. The application includes background information and a description of the applicant's knowledge, Skills, and abilities, and explains their motivation for becoming a volunteer. (AKA Gateway Questionnaire (GQ))
Area Peace Corps Medical Officer (APCMO)	A physician who, in addition to serving as a physician advisor in a base country, supports PCMOs in one or more neighboring countries
Assessment	Evaluation of an applicant's skills and suitability for Peace Corps Service. Each applicant is assessed for technical skills, language and cross cultural skills, motivation, and commitment.
Assignment Area (AA)	Description of the training, qualifications, and experience required to work in a volunteer assignment. All volunteer assignments are organized into 25 assignment areas. It is the common reference by which posts request trainees and VRS recruits applicants.
Assignment Area Description	Generic description of the range of skills required to support a specific Sector and set of recommendations to be considered by Posts in developing Volunteer Assignment Descriptions (VAD). AAs are defined at the sub-program level. For example, the Environment Sector includes 3 AAs, Forestry, Protected Areas Management, and Environmental Education or Awareness.



Assignment Area Sector	A broad area under which Peace Corps Assignment Areas are grouped. Assignment Area sectors are not broken down into sub sectors (VRS)
Background Check	Investigation performed to ensure that there are no legal issues barring a candidate from service as a Peace Corps volunteer.
Candidate Workflow	The candidate will progress through a number of stages. Candidates may pass through these stages automatically, based on a change in HR status. Others will need to be manually progressed through the stages.
Campaigns	Complete details of Peace Corps events, including information posted on the Peace Corps website, marketing instructions, attendance information, and event logistics.
Candidate	Overreaching term for an individual at any point in the process of becoming a Peace Corps Volunteer. The phases in the Volunteer Lifecycle are subdivided into applicant, nominee, invitee, trainee, and volunteer.
Close of Invitation (COI)	The last date that a nominee can be issued an invitation to serve as a Peace Corps Volunteer.
Closed	A country status applied to a country where there are no Volunteers or trainees and no Peace Corps staff. Date of closure is defined as date when last Peace Corps staff person departs.
Communication	Communications provide you with the ability to send correspondence directly from within the system. Communications are a one-way event about the candidate. Communications are stored in the candidate's Talent Record. Communications may include items such as an interview confirmation or an invitation packet.
Completion of Service (COS)	A specific date, usually after two years, after which a Peace Corps Volunteer's commitment to serve the host country as outlined in the Volunteer Assignment Description has been fulfilled. AKA Close of Service
Correspondence Match	A Coverdell World Wise Schools program that matches up Peace Corps Volunteers in the field with U.S. classroom teachers.
Country Need	The issue for which the host country has requested support from Peace Corps.
Coverdell World Wide Schools (CWWS)	A Peace Corps program that provides educational resources based on Peace Corps experience and connects serving Volunteers with schools in the United States.
Description of Service (DOS)	The Volunteer Description of Service (DOS) Statement serves as the official Peace Corps reference for returned Peace Corps Volunteers. It describes the Volunteer's training and overseas activities in non-evaluative terms and, when appropriate, includes EO 11103 certification (non-competitive eligibility for selection for federal employment).
Domestic Programs	Peace Corps programs that take place in the United States.



DOVE	Acronym used to brand software components of the new VDS system.
Early Completion of Service (Early COS)	A Volunteer's COS date may be advanced up to 90 days if the Volunteer will have completed his/her primary and secondary responsibilities before the proposed COS date.
Early Termination (ET)	The end of a Peace Corps Volunteer's service prior to the completion of service date. There are four types: resignation, medical separation, administrative separation, interrupted service.
Eligibility Questions	The candidate must complete screening questions when applying, to determine initial eligibility.
eLink	An eLink allows email to be used to streamline the candidate process. The emails, directed to members of the team, contain a link. This allows them to review candidates and provide feedback without needing to access the system directly. The eLink responses are stored in the Talent Record. eLinks may also include forms to complete while moving a candidate through the process.
Enter on Duty (EOD)	When an applicant (acceptee) signs in at a staging event, the applicant has "entered on duty." An EOD refers to a person that has entered on duty and is synonymous with Trainee Input.
Europe, Mediterranean, Asia (EMA)	One of three Peace Corps program regions. Includes posts in Europe, Mediterranean, and Asian countries.
Evergreen Req	A onetime requisition created with posting details of positions and used by candidates to apply.
Extension	A Volunteer whose continued service is desired by a host country may request permission to extend service by submitting a written request to the Country Director.
External Contact	Individual or Organization outside/external to the Peace Corps.
Final Medical Disposition	Final status of an applicant's medical review, resulting in either medically qualified or medically not qualified for volunteer service.
Final Medical Clearance	Candidate is cleared medically/dentally for Staging.
Form	A form contains communication from or about the candidate. Forms are stored in the candidate's Talent Record. For example: Answers to the screening questions on the Talent Gateway EEO
Gateway Questionnaire (GQ)	This is the application form that a candidate completes.
Health History Form (HHF)	Candidate's initial self-report of their medical history.



Health Insurance Portability and Accountability Act (HIPAA)	Because Peace Corps provides and/or pays for medical services to its Volunteers (as set forth in Manual Section 262), Peace Corps is considered by the U.S. Department of Health and Human Services to be a covered entity under HIPAA. However, only the Peace Corps' activities in the United States are subject to HIPAA and its implementing regulations. HIPAA does not apply to Peace Corps' medical activities overseas.
Health Screen	The Health Screen of applicants is the customized evaluation of the candidate's health, based on the profile provided in the HHF submitted with the application. The screen includes an evaluation of the candidate's physical exam, dental and eye examination.
Home of Record Contact Information	The Home-of-Record is the city and state or country the Trainee or Volunteer determines to be his or her place of permanent residence and is the place to which termination travel is authorized.
Host Country	A country that has requested support from and agreed to host Peace Corps volunteers.
HR Status	The HR status is used to identify where in the process a candidate is currently. This can be used to generate reports and automate some of the processes, so it is important to update it accurately. An HR status might be: Application Complete Legally Cleared
Inquiry	A request for information about becoming a Peace Corps Volunteer.
In-Service Training (IST)	Training activities that take place in the volunteer's assigned country during the period of service and meet a volunteer's ongoing training needs: technical, linguistic, cross-cultural, health, and personal safety. ISTs may include early service, mid service, and close of service conferences.
Inter America Pacific (IAP)	One of three Peace Corps program regions. Includes posts in the Caribbean, Central America, South America, and Pacific Islands.
Interrupted Service (IS)	A type of Early Termination. Volunteer may be separated with interrupted service if Country Director determines that circumstance beyond the control of the Volunteer make it necessary for the Volunteer to leave his/her assignment.
Invitation	1-An offer made to an applicant for a specific volunteer assignment 2-Confirmation of the candidate's assignment to a specific country program, including VAD and departure date.
Invitee	An applicant that has been invited by a placement officer to a specific volunteer assignment.
Job Code	A job code allows a standard set of data to be pulled in when creating a new requisition. For example, a standard job description.
Job Specific Requisition (JSR)	Created by Posts to request each AA in a particular training class.



Leads	Potential Peace Corps candidate. A person who registers to attend a Peace Corps event or requests information from the website.
Manager	Responsible for managing requisition.
Married Couples Requisition (MC Req)	A requisition created specifically to hold married couples after nomination until they are each placed in JSRs just prior to invitation.
Master's International	Peace Corps domestic program that combines graduate study with Peace Corps service for prospective Volunteers.
Master's International Requisition (MI Req)	A requisition created specifically to hold Master's International nominees after nomination until they are placed in a JSR just prior to invitation.
Medical Application Exchange (MAXx)	The name of the technology behind the medical pre-service system.
Medical Disposition	Current status of an applicant's medical review.
Medical Evacuation (Medevac)	Any transfer of a Volunteer across an international border in order to reach a higher level of care. In general, medevac is indicated when an illness or injury requires evaluation and treatment beyond the scope of care available in-country through: (1) the Peace Corps health unit, (2) field consultation, and (3) approved in-country consultants and resources. The majority of medevacs are to the U.S. In certain circumstances, however, medevacs are to a regional evacuation site or other non-U.S. location.
Medical Folder	A chronological record of personal medical information for each Volunteer from the time of the pre-training physical/dental examination through termination of service.
Medical Kit	A set of medical forms and letters sent to a Peace Corps applicant as part of the application process for Peace Corps service.
Medically Not Cleared (MNC)	Candidate is not medically qualified for a position.
Medical Qualification	A medical disposition in which an applicant receives clearance to serve at one or more Peace Corps posts.
Medical Restriction List	List of Peace Corps posts that can medically support volunteers that have a particular medical condition or requirement.
Medical Separation	A type of Early Termination. A Volunteer with a medical condition that PC cannot medically accommodate or resolve within 45 days is medically separated.
Next of Kin Contact Information	A type of contact Information for individuals that are in or have completed the volunteer lifecycle. It includes contact information of an individual's family member.
Nominee	An applicant that has been nominated by a recruiter.



Nomination	Recruiter's recommendation to further consider a candidate for placement as a Peace Corps Volunteer.
Nomination Cleared	Medical pre-screening nomination status that informs Recruitment to place Candidate in a JSR and informs Legal to begin review.
Nomination Validation Required	Medical Pre-screening nomination status that requires candidate to submit copies of recent medical records. It also informs Recruitment to place Candidate in a JSR.
Owner	Responsible for creating a requisition.
Peace Corps Response (PCR)	Peace Corps Response is a program within the Peace Corps that mobilizes Returned Peace Corps Volunteers (RPCVs) and highly experienced professionals to provide short-term humanitarian service to countries worldwide.
Peace Corps Response Volunteer (PCRV)	A volunteer working on a Peace Corps Response project.
Peace Corps Volunteer (PCV)	A person who has been sworn in as a Peace Corps Volunteer and is working on a Peace Corps project in a Peace Corps Post.
Pools	Applicants who are nominated to groupings based on specific requirements.
Post	Peace Corps operations outside of the US that directly implements a Peace Corps program at a particular country or sub-regional area in the world.
Pre-Service Training (PST)	The training of Peace Corp Trainees that usually lasts between 8 to 12 weeks. The training takes place in the country of service and includes technical, language, safety and security, and cross-cultural components.
Program	1- Refers to all Volunteer activities within one country. For example, the entire Peace Corps operation in Ecuador is referred to as the Peace Corps program in Ecuador. 2-All Peace Corps activities within one country, both operational and programmatic. The entire Peace Corps operation at a post is called the Peace Corps program.
Program Year	A fiscal year during which a Peace Corps program, project, or assignment is scheduled to take place or has taken place. Program year is used for planning and historical purposes.
Project	All Volunteer activities related to a common purpose. The purpose is achieved by implementing a set of goals and objectives. A project may be defined by sectors (e.g., Community Health, Micro-enterprise) or it may be focused on one issue and involve several sectors (e.g., Household Food Security Project).
Quarterly Trainee Request Summary (QTRS)	Document that is submitted on a quarterly basis which serves as official request from Post to Headquarters for number and type of trainees by Assignment Area.





Reassignment	Upon request from, or with the concurrence of host country officials, a Country Director may reassign a Trainee or Volunteer from one assignment to another within the host country. The reassignment can be temporary or permanent.
Recruiter	Individual working in the Regional Recruitment Office or located in a community tasked with marketing the Peace Corps and recruiting and interviewing applicants for service as Peace Corps volunteers.
Region	See AFR, EMA, and IAP
Regional Recruitment Office (RRO)	One of the Peace Corps US Offices responsible for recruiting, assessing and nominate suitable candidates for service as Peace Corps Volunteers.
Registration Allowance	Upon arrival at staging, Trainees are provided a registration allowance to defray costs of photographs, fingerprinting, and other related expenses incurred in route to the staging site.
Req Team	Group of staff that receives notification for certain reqs and provides access to candidates associated to the req they have been assigned.
Request Type	A request type allows a standard set of data to be pulled in when creating a new requisition. For example, a standard description.
Requisitions	Also known as a “req”, the job requisition is the details of the posting. This includes how many positions are currently open and which candidates have applied to it. Each req will have unique number associated with it.
Resignation	A type of Early Termination. A resignation is a decision made by a Volunteer to discontinue Peace Corps service.
Returned Peace Corps Volunteer (RPCV)	Returned Peace Corps Volunteers are those that have completed their service. Currently, no distinction has been made as to the kind of termination of service RPCVs have made (COS, Resignation, Admin Sep, Medevac, etc.), nor the length of service.
SORT	Special Other Resource Triage. The medical system will sort candidates.
Staging	A pre-departure event to orient trainees to the Peace Corps and the general demands of being a healthy, safe, and effective Volunteer so that when they arrive at post they are ready to learn and to adjust to life as Peace Corps Volunteers. AKA Pre-departure Orientation.
Start of Service (SOS)	Date that marks the beginning of a Peace Corps Volunteer’s service.
Status Code	The data codes used to determine an individual’s progress through the lifecycle.
Strategic/Scarce Skills	Specific skill sets that are requested from Posts and that are in short supply in the applicant pool.
Sub-region	Subdivision of Region. For example, the IAP region is divided into the Caribbean, Central America, South America, and Pacific Islands sub-regions.



Support Required	Candidate is restricted to certain countries/sites based on a medical condition/allergy.
Suspended	A country status applied to a country where Volunteers and trainees have departed. It is anticipated that Volunteers and/or trainees will return when it is permissible. Date when (last) Volunteers/ trainees depart determines change of country status to "suspended." Suspended countries have in-country staff support.
Talent Record	Provides access to all pertinent candidate information such as, notes, forms, HR status, eLink history, communication history, and resumes/CVs.
Trainee	An invitee who has completed staging and is currently participating in Pre-service training.
Trainee Allocation (TA)	The number of trainees that Placement estimates will be placed in each AA.
Trainee Input (TI)	The number of trainees that attended a staging (same as EOD). TI also refers to the output of the Volunteer Delivery System. TI is used as the official number of Volunteers entering the field for a given fiscal year.
Trainee Request (TR)	Request for a Peace Corps Trainee from a Post. The request includes the type of trainee requested (Assignment Area), planned arrival date at post, and programmatic requirements.
Trainee Request Review (TRR)	Collaborative, online meeting between post program staff and VRS to discuss recruitment and placement of applicants as it relates to specific project requirements.
Training	The training components of a Peace Corps Program, such as PST and IST, provided to prepare and support a Peace Corps trainee for volunteer service, as well as to support Volunteers in service and after service.
Training Class	Volunteers are inducted to the Peace Corps through Country- specific Training Classes held on a quarterly basis. The Training Class is comprised of a Staging Event and the Pre-Service Training held at Post.
Training Class Req (TCR)	Created by Placement to summarize/hold an entire training class.
Training Class Summary Sheet (TCSS)	The skills based roster for a training class. It is generated from the QTRS data submitted by the Post.
Transfer	The transfer of a Peace Corps Volunteer from one post to another. The transfer may be permanent or temporary.
University Partner	A university that has partnered with one of the Peace Corps University Programs.
University Program	Program area within the Domestic Programs office of VRS that currently includes the Master's International and Peace Corps Fellows/USA programs.











US President's Emergency Plan for AIDS Relief (PEPFAR)	US Government plan to combat global HIV/AIDS.
Volunteer	A person serving in the Peace Corps to build international goodwill and provide technical assistance to a host country. While Peace Corps Volunteers do not receive a salary, they are provided with a living allowance to cover day-to-day expenses and a readjustment allowance upon completion of service. See Peace Corps Volunteer or Peace Corps Response Volunteer.
Volunteer Assignment	A set of responsibilities to be undertaken by one or more Peace Corps volunteers working on a project.
Volunteer Assignment Description (VAD)	Details of a Volunteer Assignment including information about the Post, project, living and working conditions, and volunteer requirements. VADs are included in the invitation packets sent to applicants.
Volunteer Delivery System (VDS)	Set of interconnected processes that produce trainees for Peace Corps service and which involves several offices including Regions, Posts, VRS/P, VRS/R, VS/OMS, CEN/Staging.
Volunteer Lifecycle	The potential phases of a person's relationship with Peace Corps, starting with Prospect, and proceeding to Applicant, Trainee, Volunteer, and RPCV.
Volunteer Service	Time that an individual spends as a Peace Corps Volunteer, starting with Start of Service, and ending with Completion of Service.



## A-2: Legend

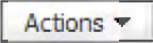





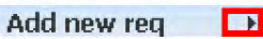








### Candidate Processing Map (Chapter 2)

Symbol	Definition
	The white boxes represent the HR statuses (See Chapter 2, Candidate Processing).
	The yellow boxes represent additional processes in DOVE (See Chapter 2, Candidate Processing). These additional processes represent additional workflow steps a Candidate must go through to become a volunteer.
	The purple ovals represent requisitions or “reqs.” This symbol with the single line indicates “Candidate Remains in Req.” (See Chapter 2, Candidate Processing and Chapter 5, Managing Reqs)
	The purple ovals represent requisitions or “reqs.” This symbol with the dotted line indicates “Candidate has Moved into Req.” (See Chapter 2, Candidate Processing and Chapter 5, Managing Reqs)
	The purple ovals represent requisitions or “reqs.” This symbol with the double line indicates “Candidate has been Copied into Req.” (See Chapter 2, Candidate Processing and Chapter 5, Managing Reqs)
	The blue circle with the white dove represents processes that happen in another part of DOVE. Unlink additional processes, these processes must leave DOVE VRS and go to for example DOVE MAXx to provide necessary candidate processing information. (See Chapter 2, Candidate Processing).
	These white numbers indicate PCV HR Statuses and options. These numbers show the logical sequence of the general applicant through the HR Statuses.
	The red numbers indicate final HR statuses. Final statuses are used when a Candidate leaves the process by their choice (e.g., “Candidate Withdrawn”) or because of something identified in Peace Corps’ evaluation that prevents them from moving forward (e.g., “Medically Not Cleared”). The final statuses are discussed in relation to disposition forms. All DOVE users should be aware that a disposition form must be filled out if someone is removed from the candidate process.






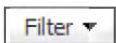





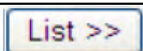





### A-3: Buttons & Icons

The following tables provide an overview of the buttons, icons, links and symbols you may see while working in the DOVE system.





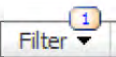












Buttons and Icons	Definition
Actions 	Actions button is located in the Talent Record and allows for completing actions for a candidate, such as adding a form.
Add >> 	Add an item from one column to another column
Add to Social Source 	Add the candidate to a campaign.
Calendar icon 	Use to make date selection.
Binoculars (front view) 	Allows for searching to be conducted.
Binoculars (side view) 	View details.
Black Arrows 	Indicate sub-menus exist under a tab, i.e. Reqs > View my reqs > Open.
Cancel (Actions) 	Cancel the selected req if the hiring need is no longer necessary. The posted req is removed from the Talent Gateways.
Cancel (Button) 	Cancel and close current page displayed.
Clear 	Clear fields of a form to start over.
Close 	Close the requisition and remove the posting from the Talent Gateways.
Display 	Display allows for managing of content within a panel, e.g. sort column information based on column title, ascending/descending order, add columns of information, resize
eLink 	Send the selected item via eLink to another system or non-system user. eLink reqs and candidates.
eLink blank req 	eLink a blank req form.
Erase candidates 	Removes all information from the Talent Record.








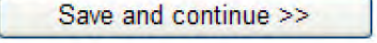
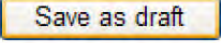


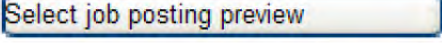



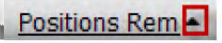

Buttons and Icons	Definition
Expanded view link  <a href="#">Expanded view</a>	Launches a new page which provides an expanded view of a particular field.
Export grid 	Export a list of information to a grid format in Excel.
File to working folder 	File a candidate to a working folder.
File to req folder 	File a candidate to a req folder.
Filter (Talent Record) 	Filter information within the Talent Record, i.e. Forms, Notes, Attachments.
Filter (Welcome Page) 	Apply preset filters to panel information, e.g.. HR status > 0-filed> all reqs with candidates at a 0-filed status only display in the My Open Reqs panel.
<p>Folders</p> <p>HR Status Icon - (Gray Folder) </p> <p>HR Status Icon - (Red Folder) </p> <p>Req Folder – (Orange Folder) </p> <p>Req Folder – (White) </p> <p>Working Folder – (White Folder) </p>	<p>Candidate was filed to at least one open req or active working folder. The folder is now closed, cancelled or deleted.</p> <p>Candidate recently filed to at least one open req folder or active working folder.</p> <p>A requisition has been opened; The req id and job title labels are auto-populated. The folder will contain candidates.</p> <p>A requisition folder that contains no active candidates. The req status may be Open or Closed.</p> <p>Created by system users and used to organize potential candidates for future use.</p>
Home <a href="#">Home</a>	Click to return to the Welcome Page that displayed when you logged into the system.
List button 	Displays a list of options to choose from after conducting a search.
Logoff <a href="#">Logoff</a>	Click to log out completely.
Magnifying glass 	Select a preview, i.e. Job Posting preview
Manage campaign 	Access Social Source and manage campaign parameters.
Maximize 	Displays a panel in full screen mode. The panel will fill the entire DOVE window.











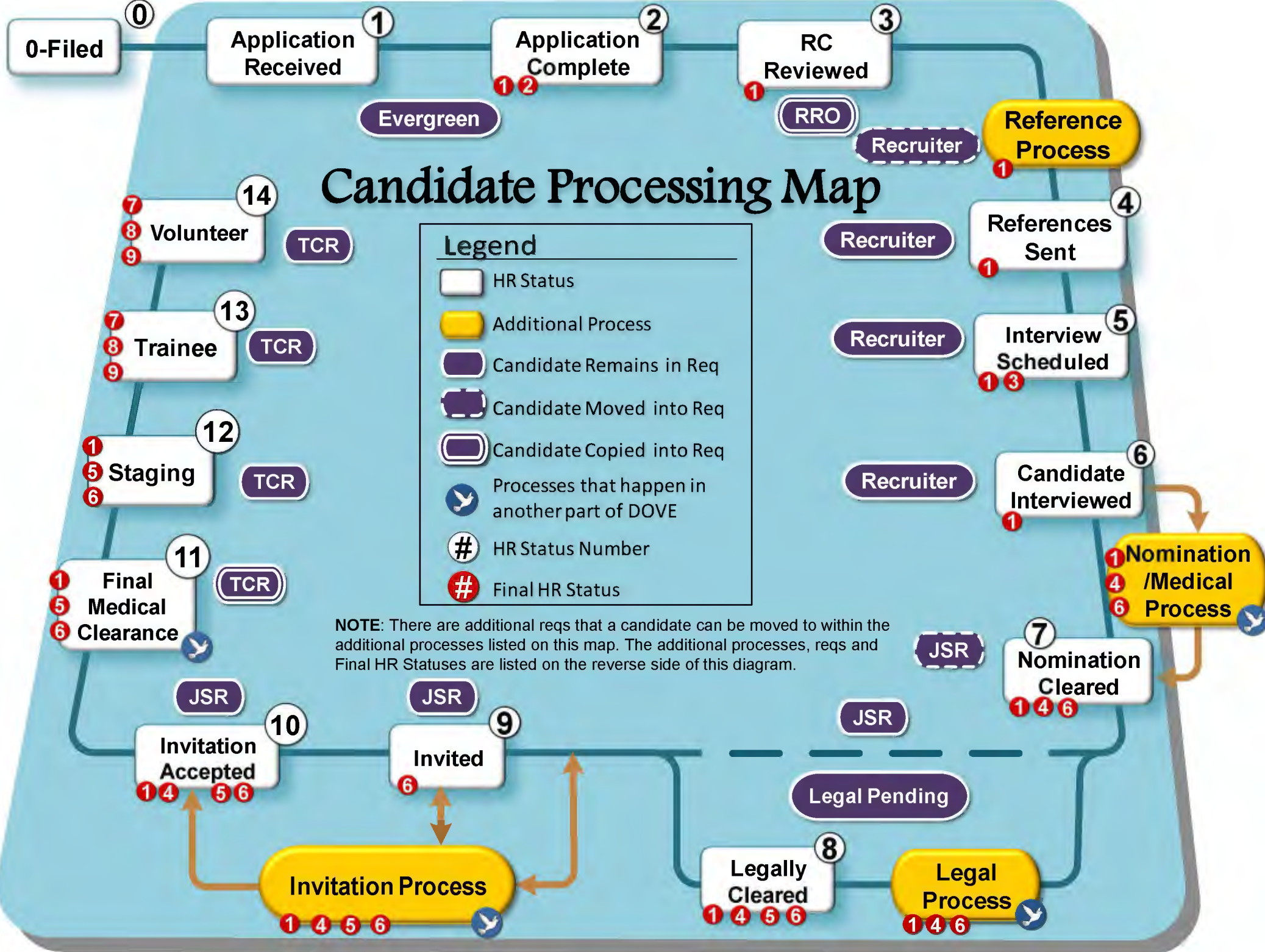
Buttons and Icons	Definition
Minimize 	Minimizes panel.
Move Down 	Move an item down in the list display.
Move Up 	Move an item up in list display.
Notes 	Displays when notes are attached to a Talent Record.
Notes + [need icon]	Displays when there are <u>no</u> notes attached to the Talent Record
Number 	The number icon above the filter indicates the number of active filter categories in place for the panel.
Open 	Open an approved req.
Paper/Pencil 	Add forms or review forms on a Talent Record.
Pencil 	Edit details on a page.
Plus/Minus 	Used to add or remove panels from the Welcome page.
Plus sign (Green) 	Add information into the system.
Push Pins	
Push pin (Horizontal) 	Unfreezes column heading information
Push pin (Vertical) 	Freezes column heading information by moving to the far left of the output grid.
Posting Options (Orange) 	Click to view the Talent Gateway posting options.
Posting Options (White) 	Req posting has expired
Print (Talent Record) 	Printing of the candidate information, action log or submission history can be completed.
Print Resume/CV 	Print the Resume/CV
Put on hold 	Place a req on hold.



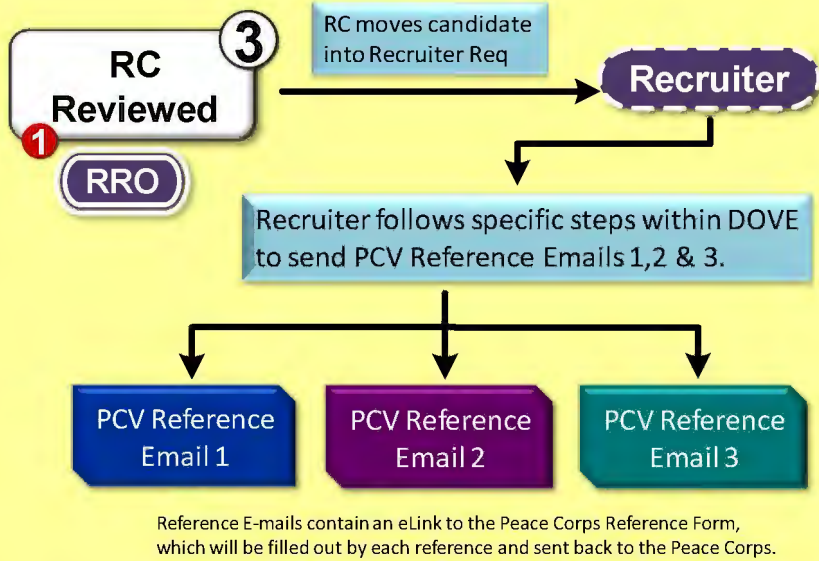
Buttons and Icons	Definition
Red asterisk * = required field	Indicates the field is required to be completed.
Refresh 	Refreshes content within a panel.
Remove << 	Remove an item from a column.
Remove panel 	Removes a panel so it no longer appears on the Welcome page.
Restore panel 	Returns the maximized panel to the default location and returns the normal panel size.
Save 	Save details, i.e. Reqs, Candidates, Talent Gateway information.
Save and Continue 	Saves information and continues to next step.
Save as Draft 	Saves a req in draft form to be completed later.
Save as new 	Save the selected requisition as a newly created requisition. The existing requisition opens, and you can make any necessary changes.
Search (Talent Record) 	Search the action log within the Talent Record.
Select job posting preview 	View how the selected requisition will appear to applicants.
Selection details link  <a href="#">Selection details</a>	Maximizes the selection table for easier navigation through a list.
Send Communication 	Send the candidate or other user an email letter. i.e. PCV nomination letter.
Source via campaign 	Search for potential candidates using the Social Source function.
Sort 	This icon shows the current sort within a panel. Clicking will change column data from ascending to descending. Click again to reverse the order. Columns that can be sorted are underlined.
Sorting Options Double triangles 	Alphabetize column information. If the top triangle is black, the column is sorted from A to Z. If the bottom triangle is black, the column is sorted Z to A.  When the triangles have no color, the column is not sorted.



Buttons and Icons	Definition
Stack duplicates 	Manually merge all of the duplicate resume/CV information into one.
Tabs 	The tabs located at the top of the page allow you to access various system functions, such as creating requisitions and searching candidates.
Trash can 	Complete a delete action.
Update candidate type 	Click to update the candidate type, i.e. Active to Inactive.
View printable page 	Preview a printable list of candidates in a req folder.
URC 	Access the Kenexa User Resource Center which contains online help resources.



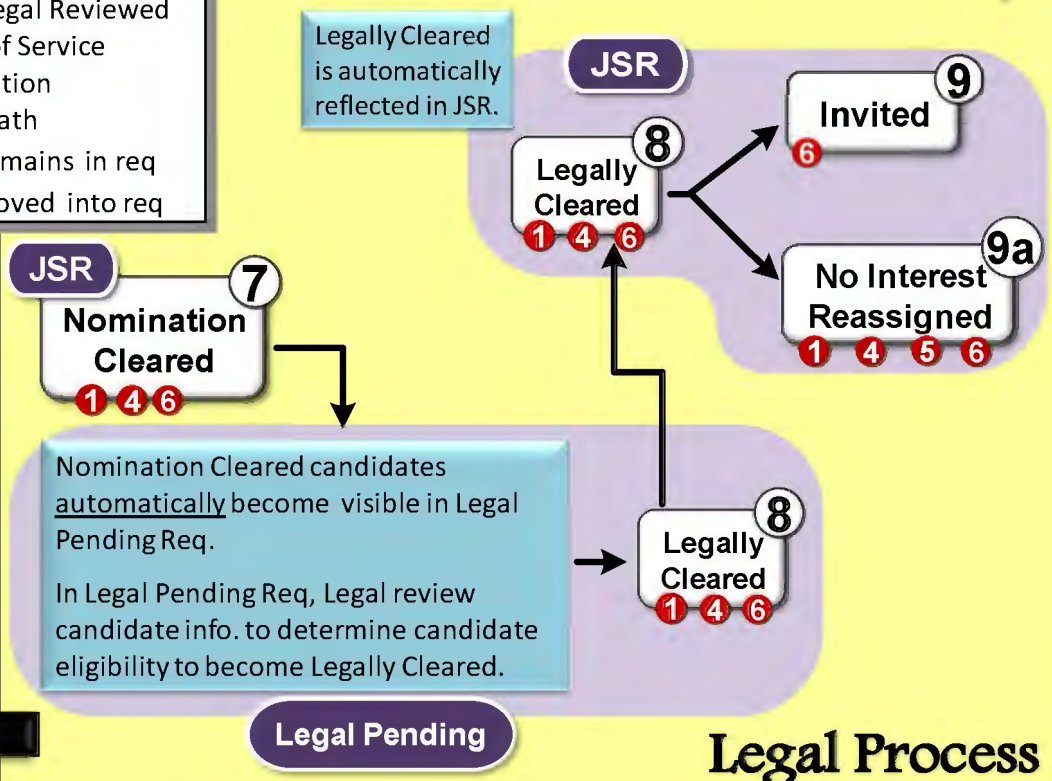
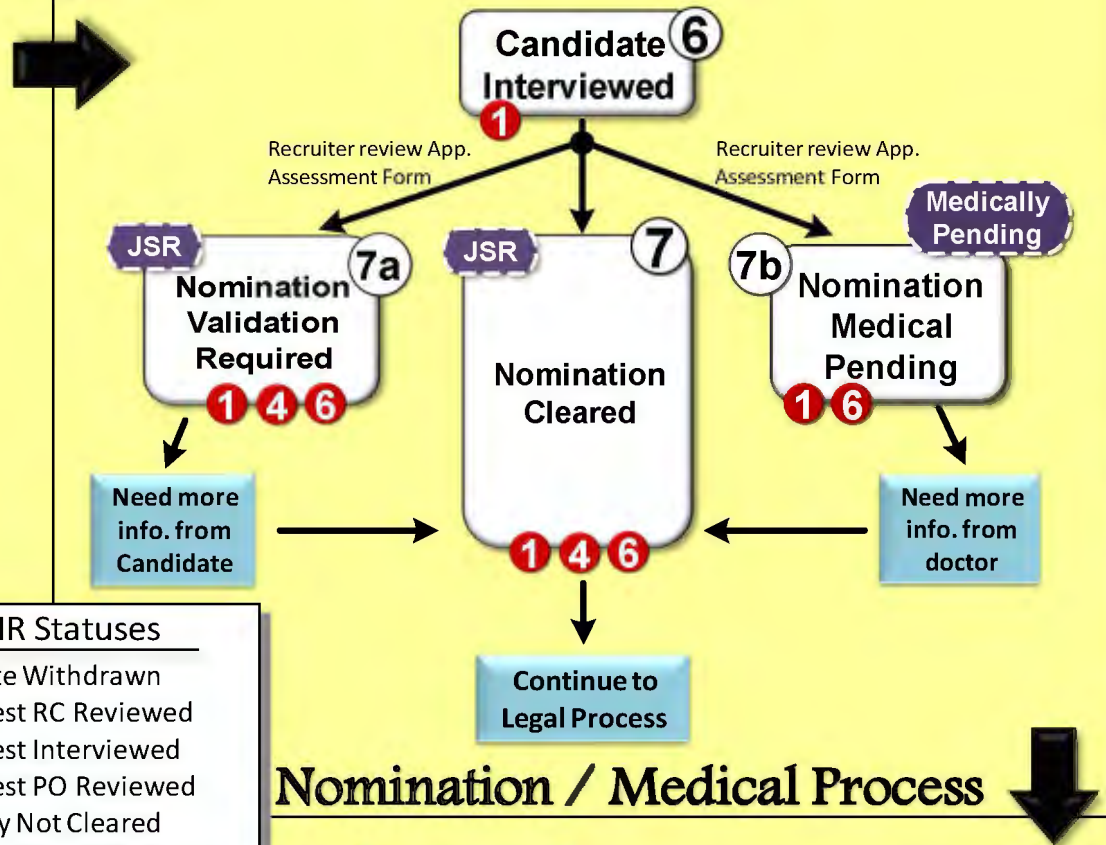
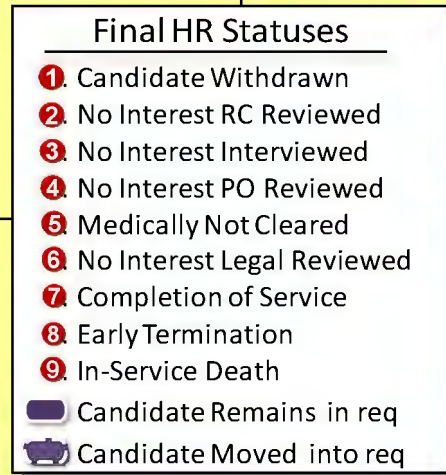
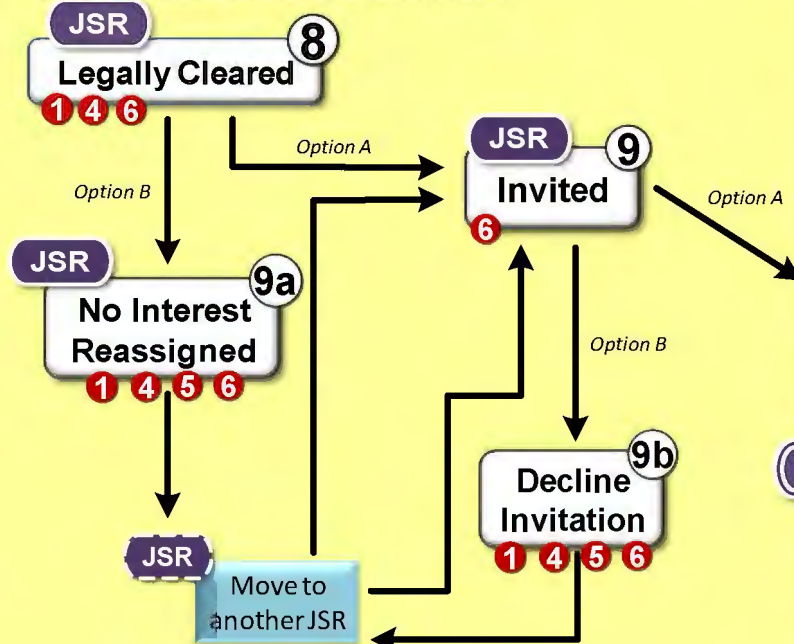


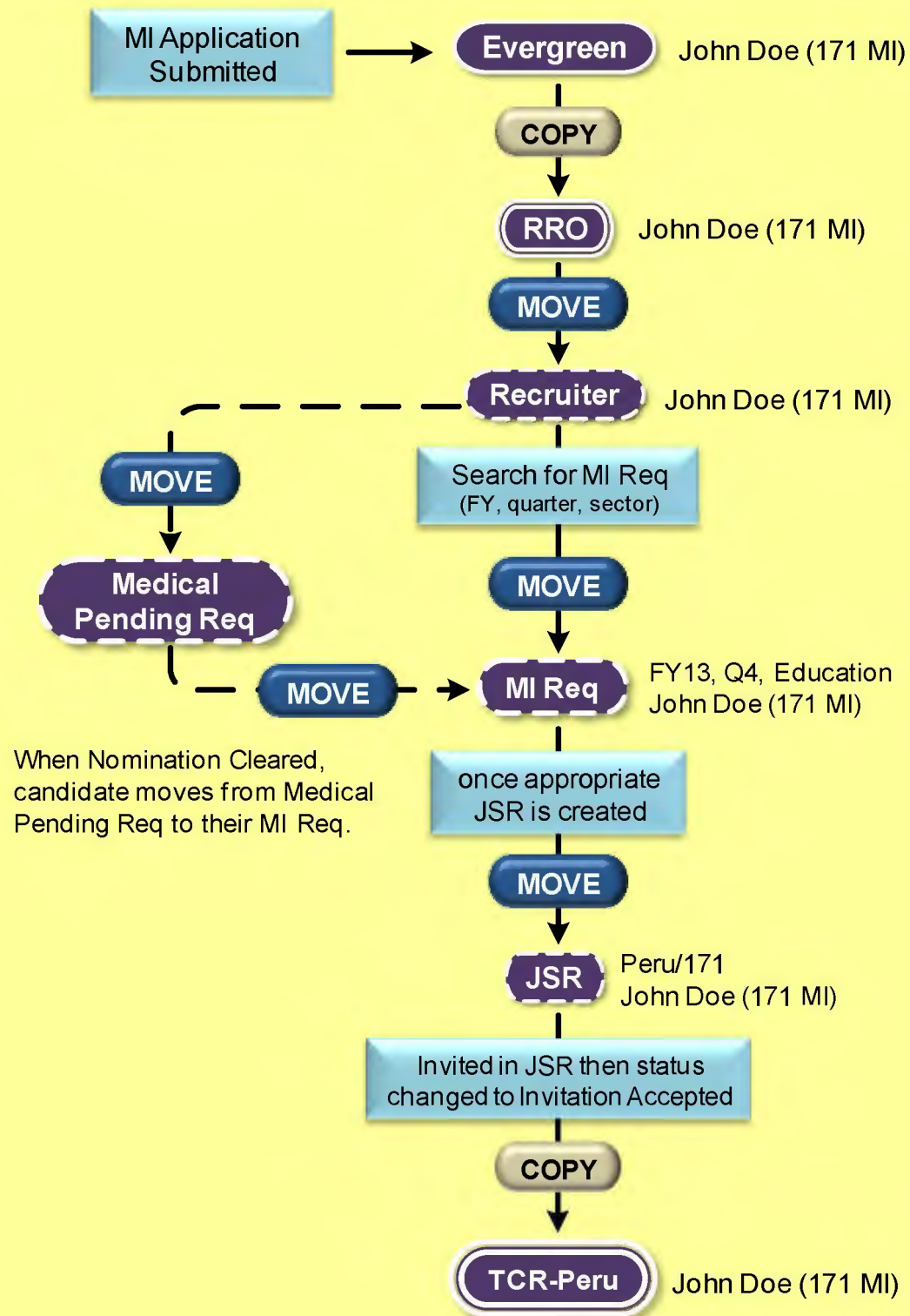


## References Process

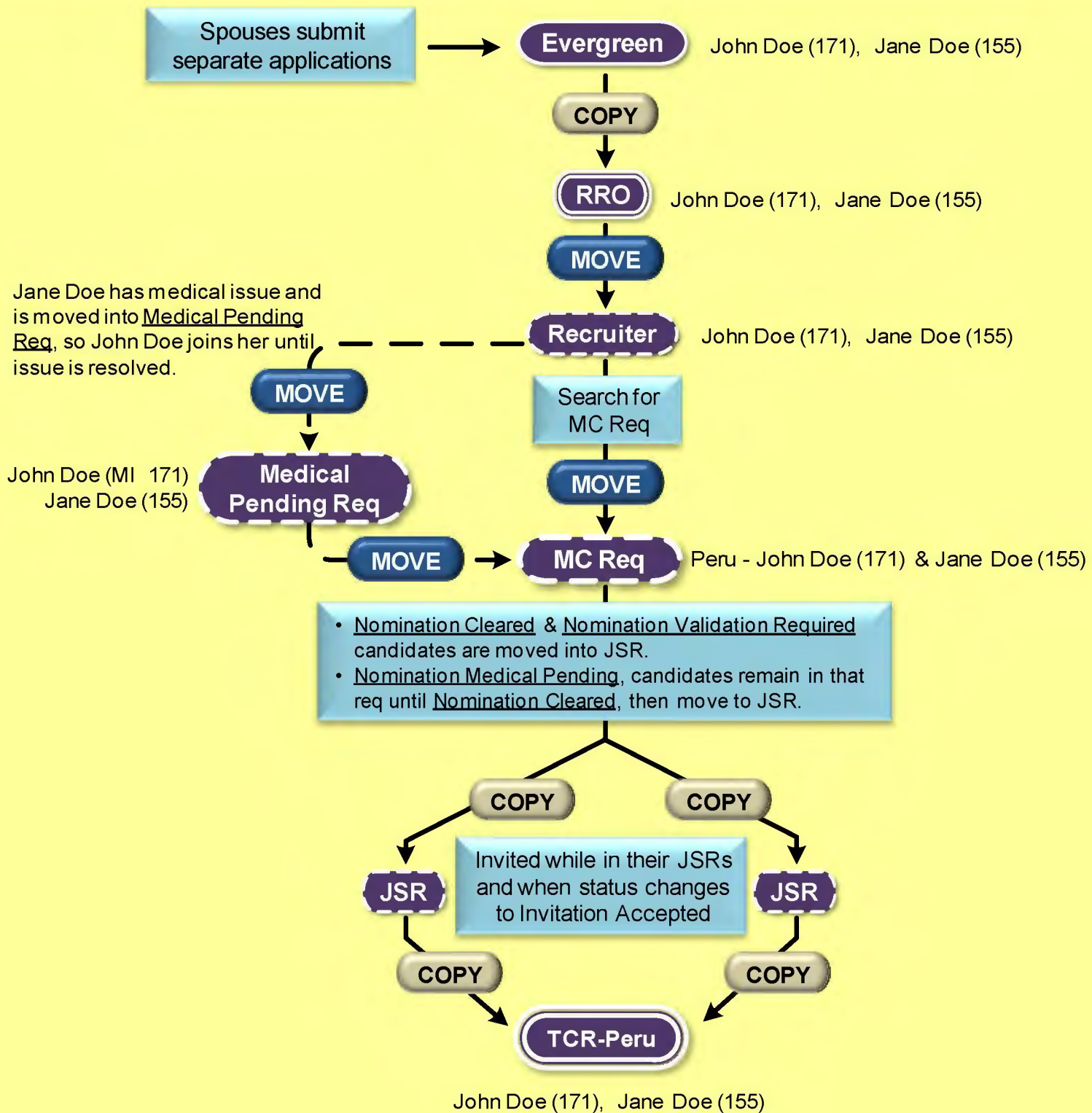


## Invitation Process











## **Appendix C: Regional Recruiting Offices**

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Following is a list regional recruiting offices (RRO). When searching for an RRO Req, these are the offices represented in DOVE.

- Atlanta RRO
- Chicago RRO
- Dallas RRO
- Los Angeles RRO
- Mid-Atlantic RRO
- North Eastern RRO
- San Francisco RRO
- Seattle RRO

# Appendix D:Req Lifecycles

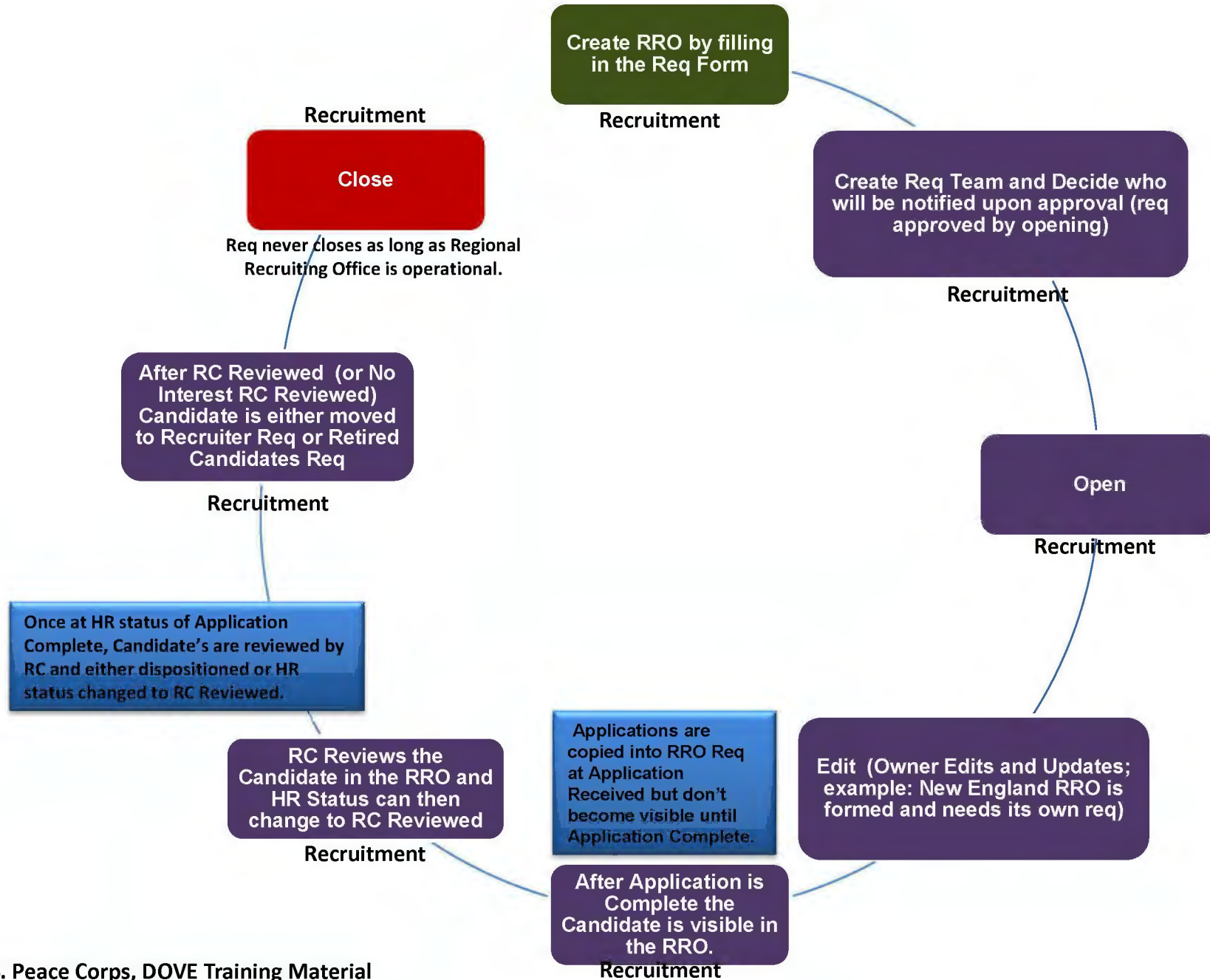
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- ▶ D-1: Regional Recruitment Office (RRO) Req
- ▶ D-2: Recruiter Req
- ▶ D-3: Job Specific Req (JSR)
- ▶ D-4: Training Class Req (TCR)

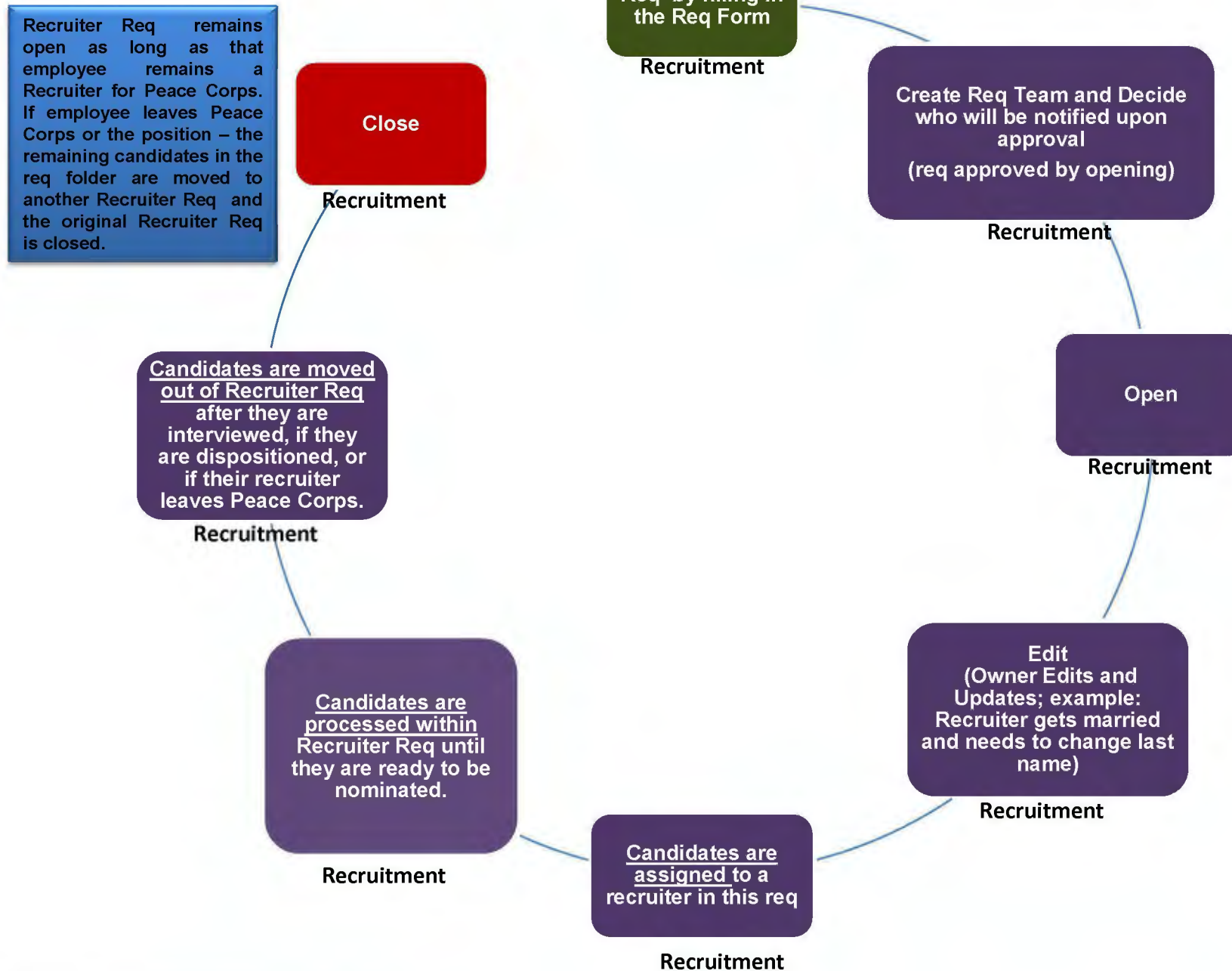
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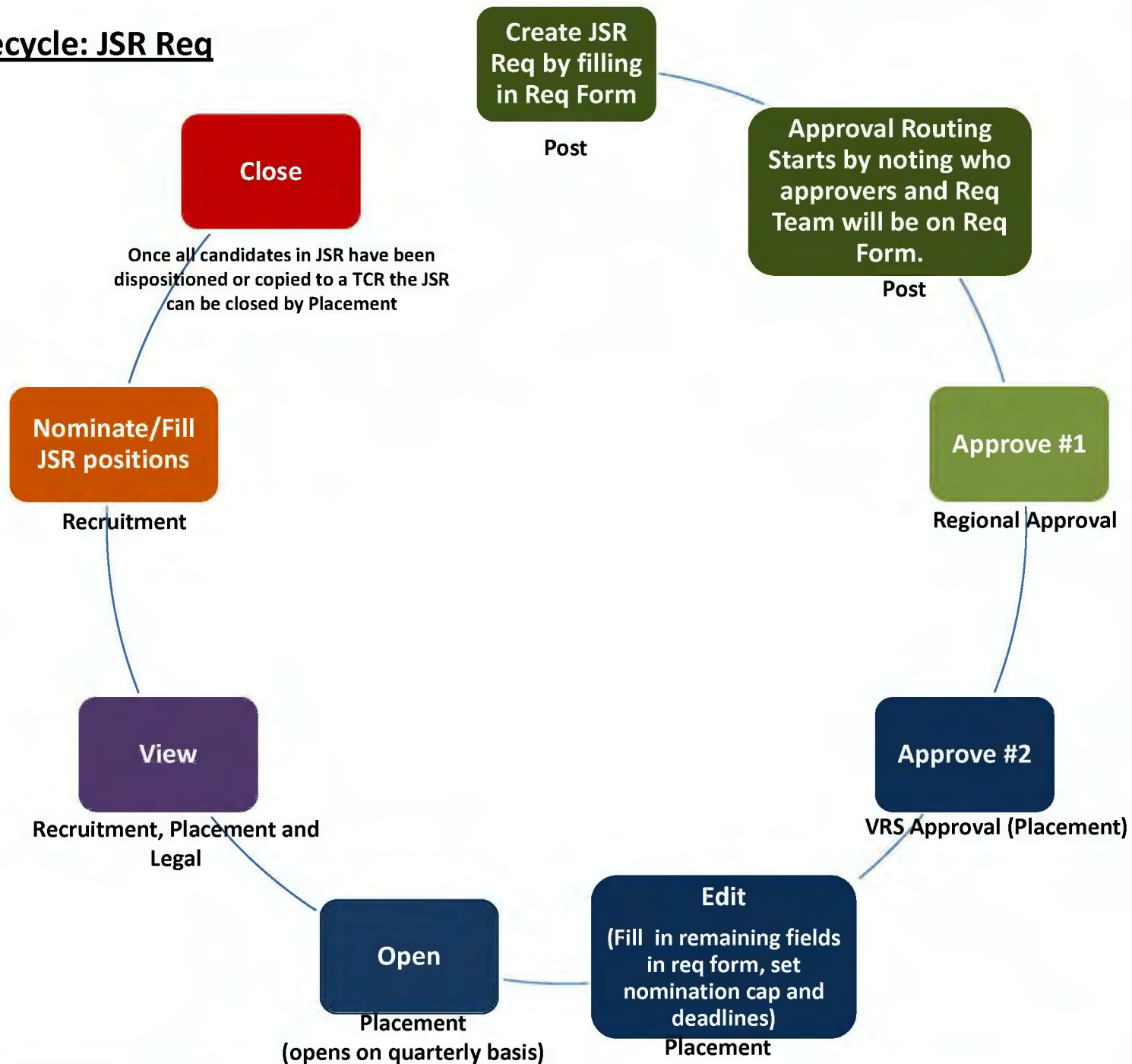
## Req Lifecycle: RRO Req



## Req Lifecycle: Recruiter Req

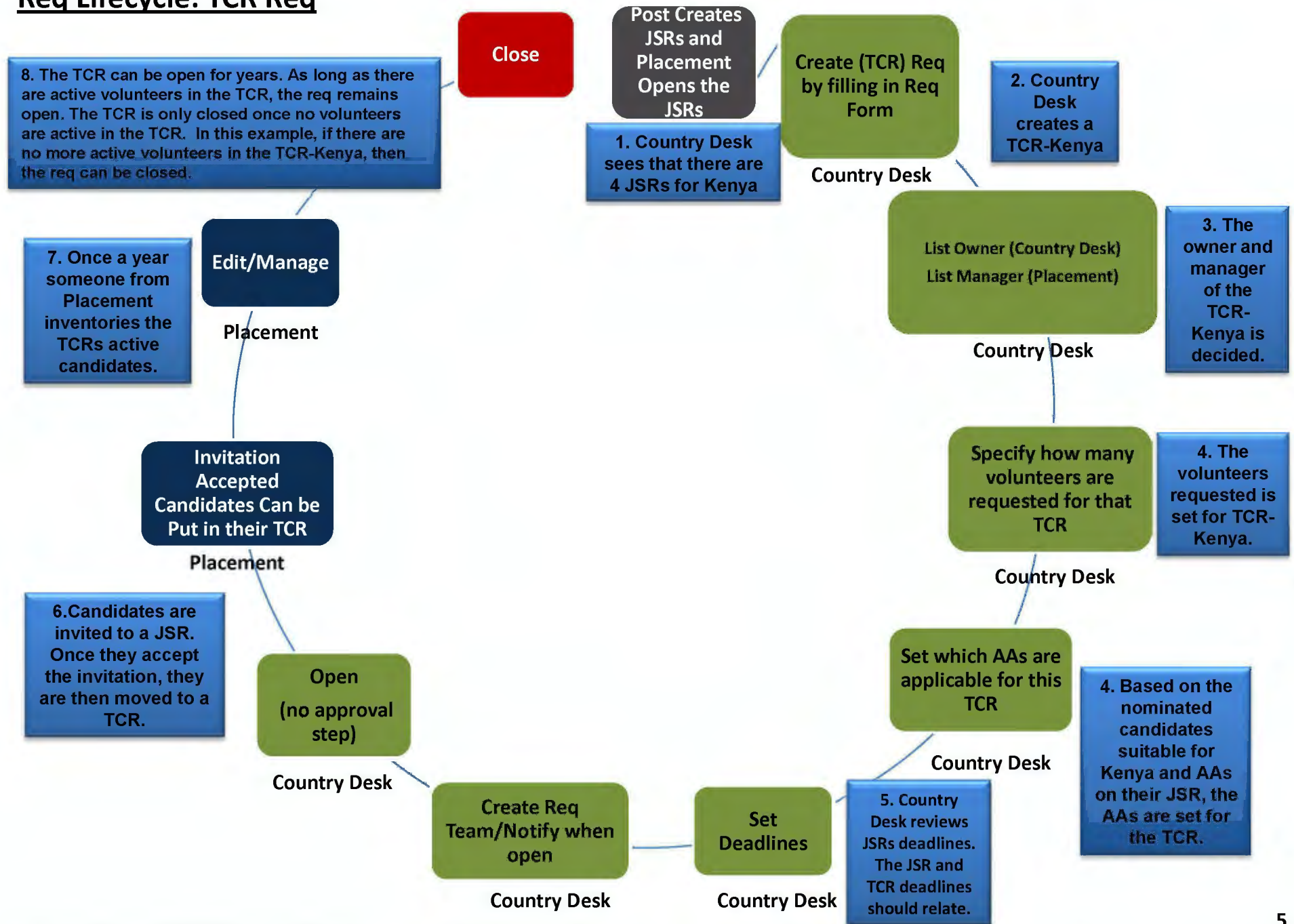


## Req Lifecycle: JSR Req





## Req Lifecycle: TCR Req



## Appendix E: How to Get Help – Initial Roll-out

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- **Wing Leaders:** Local help resources for users at the RROs
- **DOVE System Manual:** Contains key step-by-steps, best practices, and process information.
- **Peace Corps Help Desk:** Help with SSO, password, and other technical difficulties.
- **FAQ:** Common questions and tips mapped from current resources

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# Appendix E: How to Get Help – FAQ

Topic	Chapter	Section
What is DOVE?	Chapter 1, Introduction to DOVE	1.1
What makes up DOVE?	Chapter 1, Introduction to DOVE	1.1
Who provides the Talent Management Solution to Peace Corps?	Chapter 1, Introduction to DOVE	1.2
Where can I find a glossary of all the buttons, icons, terms, and legends?	Appendix A	Appendix A1-3
Where can I find a description of the Candidate Processing Map?	Chapter 2, Candidate Processing & Appendix B, Process Maps	2.1
Where can I find a map of the additional processes in DOVE?	Appendix B	
Where can I find a description of the candidate processing?	Chapter 2, Candidate Processing	2.2
Where can I find a list of all the Talent Masks candidates see during candidate processing?	Chapter 3, Candidate Experience	3.1

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## Slide 2

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e1

This FAQ is in development. Instructors should continue to add questions and point to resources as training is conducted, evaluated and reviewed.

emoody, 12/21/2011

# Appendix E: How to Get Help – FAQ

Topic	Chapter	Section
How do I login?	Chapter 4, Getting Started	4.1
What are system best practices?	Chapter 4, Getting Started	4.2
What are DOVE best practices?	Chapter 4, Getting Started	4.3
Why do I copy and/or move?	Chapter 4, Getting Started	4.3
How do I set up my DOVE Dashboard defaults?	Chapter 4, Getting Started	4.5
What is a req?	Chapter 2, Candidate Processing and Chapter 5, Managing Reqs	2.1, 5.1
What are the types of reqs?	Chapter 5, Managing Reqs	5.2
Where can I find a table of all of the types of reqs, the functional role details, and definition?	Chapter 5, Managing Reqs	5.2

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# Appendix E: How to Get Help – FAQ

Topic	Chapter	Section
What is a req lifecycle?	Chapter 5, Managing Reqs	5.3
How do the req lifecycles differ?	Chapters 17-20, Appendix D	
How do I view my reqs?	Chapter 5, Managing Reqs	5.4
How do I create a req?	Chapter 5, Managing Reqs	5.5
How do I create a JSR?	Chapter 5, Managing Reqs	5.6
How do I route a JSR for approval?	Chapter 5, Managing Reqs	5.7
Who is involved with approval routing the JSR?	Chapter 5, Managing Reqs, Appendix D	5.7
How do I open a req?	Chapter 5, Managing Reqs	5.8
How do I know if a req is filled?	Chapter 5, Managing Reqs & Chapter 6, Closing Reqs	5.9,6.3

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# Appendix E: How to Get Help – FAQ

Topic	Chapter	Section
How do I know if a req contains candidates?	Chapter 5, Managing Reqs	5.10
How do I create a TCR?	Chapter 5, Managing Reqs	5.10
How do I view a req?	Chapter 5, Managing Reqs	5.11
Why do reqs close?	Chapter 6, Closing Reqs	6.1
Can I close a req if active candidates are in that req?	Chapter 6, Closing Reqs	6.2
Where do dispositioned candidates go when the req is cleared?	Chapter 6, Closing Reqs	6.2
What is an HR Status?	Chapter 2, Candidate Processing and Chapter 7, Working with HR Status	2.1, 7.1
Where can I find a table of all the HR statuses and how they relate to the reqs?	Chapter 7, Working with HR Status	6.1
How can I update an HR Status?	Chapter 7, Working with HR Status	6.2

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## Appendix E: How to Get Help – FAQ

Topic	Chapter	Section
How can I view an HR Status?	Chapter 7, Working with HR Status	6.3
What are final statuses?	Chapter 7, Working with HR Status	7.5
How do final statuses relate to a disposition form?	Chapter 7, Working with HR Status	7.5
Can a Candidate be in more than one req?	Chapter 7, Working with HR Status	7.6
What is a nomination cap? (nom cap?)	Chapter 8, Managing Candidates	8.1
How do I use a req folder?	Chapter 8, Managing Candidates	8.2
How do I copy and/move?	Chapter 8, Managing Candidates	8.3

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# Appendix E: How to Get Help – FAQ

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Topic	Chapter	Section
What is a Talent Record?	Chapter 9, Candidate Talent Record	9.1
How do I access a Talent Record for a Candidate?	Chapter 9, Candidate Talent Record	9.1
What are the three sections of a Talent Record?	Chapter 9, Candidate Talent Record	9.1
How can I track and perform actions on a Talent Record?	Chapter 9, Candidate Talent Record	9.2
What is the Actions Button?	Chapter 9, Candidate Talent Record	9.3
How do I add a note?	Chapter 9, Candidate Talent Record	9.3
Can I view multiple candidates' Talent Records?	Chapter 9, Candidate Talent Record	9.4
How can I review a Gateway Questionnaire?	Chapter 9, Candidate Talent Record	9.5

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# Appendix E: How to Get Help – FAQ

Topic	Chapter	Section
How do I perform a quick search?	Chapter 10, Searching in DOVE	10.1
How do I perform a req search?	Chapter 10, Searching in DOVE	10.2
How do I perform a candidate search?	Chapter 10, Searching in DOVE	10.2
Can I use boolean queries in DOVE?	Chapter 10, Searching in DOVE	10.3
What is an output grid/grid display?	Chapter 11, Managing Grid Displays	11.1
How do I select output grids?	Chapter 11, Managing Grid Displays	11.2
How do I select output grids to add and remove values?	Chapter 11, Managing Grid Displays	11.2
How can I customize my view of the output grid?	Chapter 11, Managing Grid Displays	11.3

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# Appendix E: How to Get Help – FAQ

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Topic	Chapter	Section
How do I freeze or alphabetize a grid display?	Chapter 11, Managing Grid Displays	11.3
How do I sort or use filters?	Chapter 11, Managing Grid Displays	11.4
What are the communications in DOVE?	Chapter 12, Communications in DOVE	12.1
How do I send a communication?	Chapter 12, Communications in DOVE	12.2
How are sending references different than sending other communications?	Chapter 12, Communications in DOVE	12.3
What do forms allow me to do in DOVE?	Chapter 13, Forms in DOVE	13.1
What are the required elements of a form?	Chapter 13, Forms in DOVE	13.1
How do I access a form?	Chapter 13, Forms in DOVE	13.2

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# Appendix E: How to Get Help – FAQ

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Topic	Chapter	Section
How do I add/delete a form?	Chapter 13, Forms in DOVE	13.3
How do I send a blank form?	Chapter 13, Forms in DOVE	13.4
Where can I find a list of forms used in DOVE?	Chapter 13, Forms in DOVE	13.5
What are eLinks?	Chapter 14, eLinks in DOVE	14.1
How do I send an eLink?	Chapter 14, eLinks in DOVE	14.1
How do I view an eLink?	Chapter 14, eLinks in DOVE	14.2
How do I respond to an eLink?	Chapter 14, eLinks in DOVE	14.3

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# Appendix E: How to Get Help – FAQ

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Topic	Chapter	Section
How do I set up my Dashboard?	Chapter 15, Advanced Set-up of the DOVE Dashboard	15.1
What additional options are there to customize the Dashboard?	Chapter 15, Advanced Set-up of the DOVE Dashboard	15.2
How do I take actions from the Dashboard?	Chapter 15, Advanced Set-up of the DOVE Dashboard	15.3
What is a legal pending req?	Chapter 16, Legal Pending Req	16.1
How does the Legal Pending Req lifecycle differ from the basic req lifecycle?	Chapter 16, Legal Pending Req	16.1
How do I create a Legal Pending Req?	Chapter 16, Legal Pending Req	16.2
Why is the Medical Pending Req used?	Chapter 17, Non-Standard Reqs, Medical Pending Req	17.1
How does the Medical Pending Req lifecycle differ from the basic req lifecycle?	Chapter 17, Non-Standard Reqs, Medical Pending Req	17.1

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# Appendix E: How to Get Help – FAQ

Topic	Chapter	Section
How do I create a Medical Pending Req?	Chapter 17, Non-Standard Reqs, Medical Pending Req	17.2
What is a Master's International Req?	Chapter 18, Non-Standard Reqs, Master's International Req	18.1
How does the Master's International Req lifecycle differ from the basic req lifecycle?	Chapter 18, Non-Standard Reqs, Master's International Req	18.1
How do I create a Master's International Req?	Chapter 18, Non-Standard Reqs, Master's International Req	18.2
What is a Married Couples Req?	Chapter 19, Non-Standard Reqs, Married Couples Req	19.1
How does the Married Couples Req lifecycle differ from the basic req lifecycle?	Chapter 19, Non-Standard Reqs, Married Couples Req	19.1

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# Appendix E: How to Get Help – FAQ

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Topic	Chapter	Section
How do I create a Married Couples Req?	Chapter 19, Non-Standard Reqs, Married Couples Req	19.2
What is Social Source?	Chapter 20, DOVE Social Source	20.1
How does the Social Source Dashboard work?	Chapter 20, DOVE Social Source	20.2
How do I work with Leads?	Chapter 20, DOVE Social Source	20.3-5
How do I manage Campaigns?	Chapter 20, DOVE Social Source	20.6-7
How do I create distribution lists?	Chapter 20, DOVE Social Source	20.8
How do I message leads and candidates?	Chapter 20, DOVE Social Source	20.9
How do I create blasts?	Chapter 20, DOVE Social Source	20.10

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# Appendix E: How to Get Help – FAQ

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Topic	Chapter	Section
What is the Social Source contents library?	Chapter 20, DOVE Social Source	20.11

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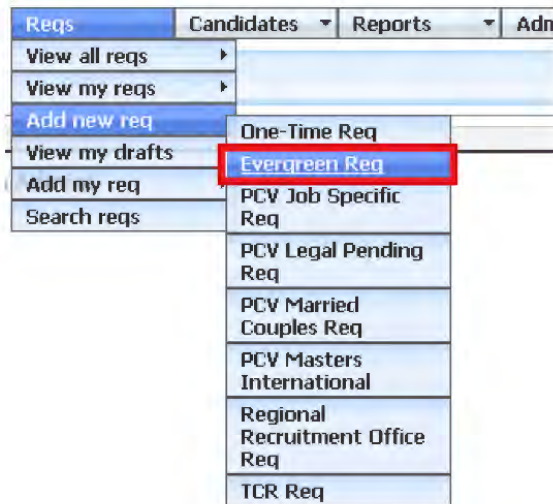


## Appendix F: Evergreen Requisition

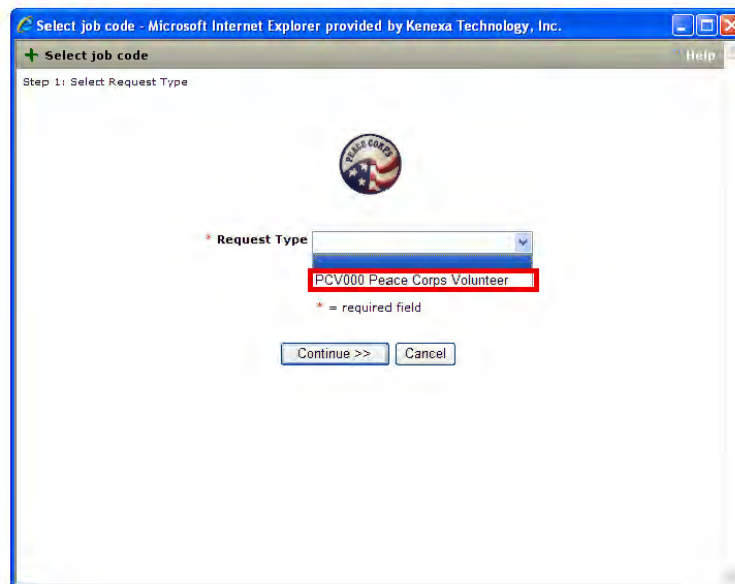
The following provides an overview for creating an Evergreen Requisition (req). The Evergreen Req will be created on a one time basis and reviewed annually by Recruitment for any needed changes. The Evergreen Req is the only requisition posted to the Talent Gateway, as this is the one req that serves to hold application information and that candidates see externally posted.

### Creating an Evergreen Req

1. Click **Reqs / Add new req /Select** the Evergreen req to be created from the req sub-menu.



2. The **Select Request Type** page appears. Use the drop-down arrow and select **PCV000 Peace Corps Volunteer**. Click **Continue >>**.





3. On the **req form**, you must enter information for all required fields, which are noted with a **red asterisk**. It is best practice to complete the form from top to bottom, as the selection for one field may automatically populate the selections for following fields.

Use the scroll bar to view and complete the entire req form.

The table below provides an overview of fields on the Evergreen Req that are noted with a red asterisk and are required to be completed.

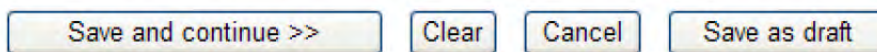
Requisition Fields	Key Information
*Request Type	Automatically populates the Request Type field based on the selection in the drop-down menu. Information is read-only. The Request Type cannot be edited.
*Title	A title will be entered for the req (e.g, Evergreen).
*Description	Enter the description of the position (e.g., Peace Corps service is a life defining experience.).
*Owner	The initial creator of the requisition is entered in this field. Use the drop-down menu or click Selection details to complete the selection.
*Manager	Select the staff person accompanying you as the “Manager” Use the drop-down menu or click Selection details to complete the selection. <a href="#">Expanded view</a>
*Volunteers Requested	The system default is 1 and can be edited.
*Req Team	Select yourself and your staff partner (s).
Turn off Autofiler notification for this req	If you do not wish to receive notification each time a Candidate applies to the req, you can click the box.
*Notify upon approval completion	Select the accompanying staff partner to be notified upon completion.

4. Click **Save and continue>>**. The Route req for approval or save without routing req for approval as page displays with a message indicating that the requisition was created.





5. Click **OK**.



6. When creating a req, you also have the option to save the req as a draft, by clicking **Save as draft**. This allows you to finish the requisition at a later date.

- If you save a req as a draft, you can access that req by selecting **Reqs/View my reqs/Pending**. To open a req, select the req's check box, and then click Edit in the Actions list.
- Complete the requisition's information, and then click **Save and continue**.
- To cancel the req, select the req's check box, and then click **Cancel** in the Actions list. Saved reqs remain in the system indefinitely until an action is taken.

## Posting to Talent Gateways

Once the req has completed the approval routing and the Open req button has been clicked, the posting options screen displays, allowing you to review posting parameters and post the req to the appropriate Talent Gateways. The only requisitions to be posted to the Talent Gateways will be the Evergreen req and it will be reviewed on an annual basis for any necessary edits or updates.

Gateway site	Repost	Days until posted	Days to remain posted	Currently posted	Posted date	Removal date	Select Gateway Questionnaire	GQ Details	Edit site questions
<input type="checkbox"/> OHS - Demo	Repost	00	365						
<input type="checkbox"/> Peace Corps - Evergreen Req	Repost	00	365				None	Expand	
<input type="checkbox"/> Peace Corps Response	Repost	00	365				None	Expand	

Reset Gateway Questionnaire(s) to default

There are no third party posting options.

Update all postings Cancel Refresh



The table below provides an overview of the Talent Gateway and the functions associated to posting an opportunity via the Talent Gateway.

Talent Gateway Column	Column Description
<b>Select all</b>	Click the Select all button to place check marks next to each Gateway site and have the requisition posted to all Talent Gateway sites.
<b>Gateway site</b>	This identifies the name of the Talent Gateway in which a requisition will be posted and displayed. To select a site, place a check mark in the box next to the Gateway site name.
<b>Repost</b>	Column is greyed out. The Repost button is activated once a req has already been posted to the Talent Gateways, allowing you to repost if necessary.
<b>Days Until posted</b>	Indicate the number of days before the system posts the requisitions. The Default is 00.
<b>Days to remain posted</b>	Indicate how many days the requisition is to remain posted. Once the number of days is reached, the posting is auto-removed from the Talent Gateway.
<b>Currently Posted/Posted Date</b>	Once the req is posted, the Currently posted and Posted dates are automatically populated.
<b>Removal Date</b>	This column automatically populates based on the Days until posted and Days to remain posted selections
<b>Select Gateway Questionnaire</b>	Displays the set of questions asked of candidates for the selected Talent Gateway. Use the drop-down arrow to make the selection.
<b>GQ Details</b>	Access questionnaire in read-only format. DO NOT SELECT. Clicking this button may freeze up your system for an extended period of time.
<b>Edit site questions</b>	Click the pushpin icon to review and add information or edit current site questions. DO NO EDIT SITE QUESTIONS. PCV will only use the standard application questions.
<b>Select job posting preview button</b>	Preview the requisition to see how it appears to candidates on the Talent Gateways.
<b>Click Update all postings</b>	Saves requisition details and posts to the Peace Corps application page for candidates to apply as a Peace Corps volunteer.

*Remember: The Evergreen Req is the only req posted to the Talent Gateway.*