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# OpenCATS Documentation

*Release 0.9.3*

**OpenCATS**

October 12, 2016



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## WARNING-READ FIRST

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This documentation is a work in progress and is VERY incomplete. Plenty more to be added as we go.





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## **3.1 What is this manual?**

This manual explains how to use OpenCATS, the free open-source applicant tracking system (ATS). It describes how to install and configure OpenCATS, how recruiters can use it to manage their work, and how to customize and extend it.

## **3.2 Release information**

The current OpenCATS release is 0.9.3.1 “Inferno”.

## **3.3 Legal information/License FAQ**

### **What license is OpenCATS distributed under?**

This License is based on the Mozilla Public License.

### **Can we change this license?**

No, the License remains as-is until the original developers change the license under which they released the code. Cognizo, who developed CATS are not changing the license - it will remain licensed under the CPL.

### **What CAN we change?**

If there was a need, the project name and/or logo could be changed. We have for example changed the Project name to OpenCATS

### **What are the key features of this license?**

There are some ‘unique’ requirements in Exhibit B;

1. You may not use the Licensed Software to operate in or as a time-sharing, outsourcing, service bureau, application service provider or managed service provider environment.
2. The following copyright notice must be retained and clearly legible at the bottom of every rendered HTML document: Copyright (C) 2005 - 2006 Cognizo Technologies, Inc. All rights reserved.
3. The “Powered by CATS” text or logo must be retained and clearly legible on every rendered HTML document. The logo, or the text “CATS”, must be a hyperlink to the CATS Project website, currently <http://www.catsone.com/>.

**Is this an Open Source license?**

Sadly, Exhibit B I) restricts one of the freedoms required to be defined as Open Source. This means that although OpenCATS is free (as in beer) and the source is 'Open', it is not officially Open Source. This project does not have the rights to strip the appendix.

**So is everything subject to the CPL?**

Not entirely. A few examples; integration into Joomla! In this case, Joomla is a completely separate GPL project, and the CATS module simply polls the backend MySQL databases for CATS. Whilst it does fall logically into the OpenCATS project, the CATS module remains Open Source. Similarly, separate backend reporting packages could easily poll the same shared MySQL database.

**Simplify this for me, what can I do and what can't I do?**

Simply put, you can do anything you want with your OpenCATS system. The main thing you can NOT do is make money off of it. You can not install it, host it, provide it as a service and get paid for it. Don't make money off of it, that's a no-no. The other things (cosmetic and linking) are specified in Section 2 and 3 above.

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## Introduction

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OpenCATS is a free and open source, full-featured, web-based applicant tracking system, or ATS. It helps you manage the complete recruitment life-cycle from business development through finalizing a placement. It manages a huge range of information for you, including:

- Candidate details, qualifications, resumes (C.V's), contact history
- Job orders details, associated contacts, and the candidate pipeline for each
- Multiple recruiters, sites, career portals, and much more

### 4.1 OpenCATS vs CATSOne vs “open source”

OpenCATS is a free, open-source ATS. This means that there is no charge to install or to use it.

- For software developers, this also means that you are free to modify or extend the OpenCATS software, and to participate as a member of its development community.
- This also means that there is no help desk that you can call for support.

The origins of OpenCATS are in a commercial open-source development effort called CATS, which split into two separate efforts:

- This open-source OpenCATS system: <http://www.opencats.org>
- The commercial CATS product: <http://www.catsone.com>

The commercial CATS product is a highly polished, professionally supported, hosted software service.

OpenCATS, on the other hand, has somewhat less functionality, is installed on your server(s), and is supported only by you – with some help from the development community.

### 4.2 General Features

**Free!:** OpenCATS is open source software. Which means it is free (no cost) to use, and you are free to modify it in (almost) any way you want. Seriously, if you can do it, get down into the code and change absolutely anything!

**Support:** It also means support may be hard to find. We have a community of people that are willing to help as much as possible though.

**It is easy:** OpenCATS has an easy to use, intuitive interface. This means minimal training time for you and your recruiters. The job portal has a simple search and application process that your candidates will get through easily.

**It's in the cloud:** OpenCATS can be in the cloud, on your local server, or simply on the computer you use every day. The choice is yours. You can use it from anywhere, so can your recruiting team.

**Website integration:** OpenCATS has a built-in job board that you can set up by simply checking a box. Candidates will be able to view your openings, apply and upload their resume (C.V.) to your OpenCATS software.

**Candidate and client management:** From the first phone call to the last email. OpenCATS will help you keep track of all the details, activities, records, contact numbers and keep your workflow managed.

**Ownership of data:** You own it. It's yours. You can control it and secure it however you want. No need for your data to be on someone else's servers, unless that is how you choose to do it.

**Backup and restore:** With a few clicks you can back up your entire OpenCATS ATS. If you ever need to restore it, that's a simple process too.

**Reporting:** Generate reports on recruiting activity for a quick and accurate overview.

## 4.3 Recruiting cycle

The basic agency recruiting cycle is this:

- Sales-Lead generation
- Lead contact
- New client
- Take job order
- Source candidates for job order
- Candidate contact
- Candidate presentation (submittal)
- Candidate interview
- Offer
- Close the candidate
- Start and bill client

---

## Windows - OpenCATS Installation Instructions

---

### Windows Prerequisites

These instructions are for the (Windows) XAMPP environment only. Download and install the following software:

- [XAMPP](#)
- [OpenCATS resume indexing tools](#)
- [Antiword](#)
- [PdfToText](#)
- [html2text](#)
- [UnRTF](#)
- [7-Zip or equivalent](#)

Installation instructions are given for the XAMPP default install environment only. And Prerequisite Installation notes below.

- Download and install XAMPP to c:xampp by following the directions provided on the XAMPP website. Very easy.
- Download the [OpenCATS resume indexing tools](#). Install the executable (exe file) and accept the default install locations.
- Optionally download [7-Zip or equivalent](#) and install. This will allow you to extract the tar ball and gz files later. If you already have an extractor then you may skip this step.
- Now you are ready to get OpenCats Download [OpenCATS.9.1a](#)

Open tarball (cats-0.9.1.tar.gz) using 7Zip and extract all files to C:xampp\htdocs\opencats. Verify that there is a readme.txt file in the directory C:/xampp/htdocs/opencats. If so you got it right :)

Launch phpMyAdmin. <http://localhost/phpmyadmin/>

- In the page that displays, type 'opencats' into the textbox under Create new database and click the Create button.
- Accept all the other defaults.

In your Web Browser, visit <http://localhost/opencats> If OpenCATS has been configured correctly, you should see a page that looks like this:

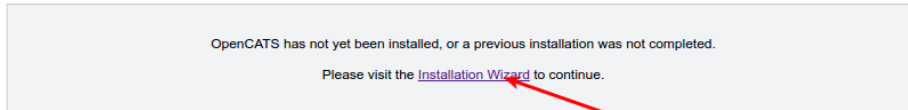
---

### Note:

- If you are running OpenCATS locally on your computer, the host address will be localhost.

**Note:**

- If your server, VPS (some shared hosting too) has a specific address or IP, you will need to enter the specific address in place of localhost to access.



**Step 1 System Connectivity** This step makes sure you have the required server environment set up correctly.

**Note:** Green = good.

**Note:** Yellow = OpenCATS will work, but some functions may not.

**Warning:** Red = Bad You can't continue the installation until a server environment issue is fixed.

**Note:** (I am setting up this example instance of OpenCATS in a shared hosting service. I do not have command line access and can not install the required modules to get rid of the yellow areas. For this Windows installation tutorial, you should have all green here.)

If you see all green and/or yellow, click Next



Step 2: Database Connectivity

Step 3: Loading Data

Step 4: Setup Resume Indexing

Step 5: Mail Settings

Step 6: Loading Extras

Step 7: Finishing Installation

Restart Install

This process will help you set up the OpenCATS environment for the first time. Before we begin, OpenCATS needs to run some tests on your system to make sure that your web environment can support OpenCATS and is configured properly.

**Test Results**

PHP version is 5.6.17.
PHP.ini: magic_quotes_runtime is disabled.
PHP.ini: register_globals is disabled.
PHP MySQL extension (mysql) is loaded.
PHP Sessions extension (session) is loaded.
PHP PCRE regular expressions extension (pcre) is loaded.
PHP CType string classification extension (ctype) is loaded.
PHP GD image manipulation library extension (gd) is loaded.
<b>PHP LDAP library extension (ldap) is not loaded.</b> Check your settings in php.ini.  OpenCATS will function without LDAP, but will not authenticate from a LDAP service  Under certain GNU/Linux distributions, the PHP LDAP extension is a separate package.  <b>Ubuntu/Debian:</b> Run "apt-get install php5-ldap" and restart your webserver.  <b>Fedora/CentOS/RHEL:</b> Run "dnf install php-ldap" or "yum install php-ldap" and restart your webserver.
<b>PHP SOAP extension (soap) is not loaded.</b> Check your settings in php.ini.  OpenCATS will function without SOAP, but CATS Professional functionality will not be supported.  Under certain Linux / BSD distributions, the PHP SOAP extension is a separate package.  <b>Ubuntu:</b> Run "apt-get install php-soap" and restart your webserver.  <b>Debian:</b> Run "apt-get install php5-soap" and restart your webserver.  <b>FreeBSD:</b> Install the php5-soap port, or configure SOAP support in the php-extensions port and restart your webserver.
PHP zip extension is loaded.
Directory ./attachments/ is readable (permissions: 0755).
Directory ./attachments/ is writeable (permissions: 0755).
Creating a file within ./attachments/ succeeded.
Directories can be created inside ./attachments/.
Configuration file ./config.php is writable.
Creating a file within ./ succeeded.
<b>One or more tests issued a warning. You may still proceed, but read the warnings carefully and address them if you can.</b>  <b>If you have any questions, visit the OpenCATS forums at <a href="http://www.opencats.org/forums/">http://www.opencats.org/forums/</a>.</b>

Next -->

## Step 2 Database connectivity

When asked for database name, user, and password use database **opencats**, user **root**, and a **blank password**.

Click Test Database Connectivity

If the SQL information is set up and entered correctly, you should have all green. If you see red, something needs to be corrected or set up correctly.

## OpenCATS

Applicant Tracking System

The screenshot shows the 'Database Configuration' step of the OpenCATS installer. On the left, a vertical list of steps is shown: Step 1: System Check, Step 2: Database Connectivity (highlighted), Step 3: Loading Data, Step 4: Setup Resume Indexing, Step 5: Mail Settings, Step 6: Loading Extras, and Step 7: Finishing Installation. Below this list is a 'Restart Install' button. The main area is titled 'Database Configuration' and contains a paragraph explaining that the installer needs MySQL database information. Below this are four input fields: 'Database Name' (linuxrec\_opencatstest), 'Database User' (linuxrec\_testuse), 'Database Password' (masked with asterisks), and 'Database Host' (localhost, with a note '(usually localhost)'). A 'Test Database Connectivity' button is located below the input fields. To the right of this button is a 'Test Results' section with a green background, listing several successful tests: 'MySQL connection was successful.', 'MySQL version is 5.5.42.', 'Database 'linuxrec\_opencatstest' selected.', 'Can create 'testtable' table.', 'Can insert into 'testtable' table.', 'Can update 'testtable' table.', 'Can delete from 'testtable' table.', and 'Can drop table 'testtable''. A final green bar states 'All tests passed successfully!'. A 'Next -->' button is at the bottom right.

Step 1: System Check  
**Step 2: Database Connectivity**  
Step 3: Loading Data  
Step 4: Setup Resume Indexing  
Step 5: Mail Settings  
Step 6: Loading Extras  
Step 7: Finishing Installation

[Restart Install](#)

**Database Configuration**

The OpenCATS installer needs some information about your MySQL database to continue the installation. If you do not know this information, then please contact your website host or administrator. Please note that this is probably NOT the same as your FTP login information!

Database Name: \*   
Database User: \*   
Database Password:   
Database Host: \*  (usually *localhost*)

[Test Database Connectivity](#)

**Test Results**

MySQL connection was successful.  
MySQL version is 5.5.42.  
Database 'linuxrec\_opencatstest' selected.  
Can create 'testtable' table.  
Can insert into 'testtable' table.  
Can update 'testtable' table.  
Can delete from 'testtable' table.  
Can drop table 'testtable'.  
**All tests passed successfully!**

[Next -->](#)

### Step 3 Loading Data

For a new installation, select `New Installation`, then next

---

**Note:** Demonstration Installation will autopopulate OpenCATS with general example clients, candidates, job orders, etc. There's no reason to use this in my opinion.

---

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**Note:** Restore installation from backup will be covered in a future tutorial

---

## OpenCATS

Applicant Tracking System

The screenshot shows the OpenCATS installer window. On the left, a vertical list of steps is shown: Step 1: System Check, Step 2: Database Connectivity, Step 3: Loading Data (highlighted), Step 4: Setup Resume Indexing, Step 5: Mail Settings, Step 6: Loading Extras, and Step 7: Finishing Installation. Below this list is a 'Restart Install' button. The main area is titled 'Loading Data - Empty Database'. It contains the text: 'The installer is ready to set up your OpenCATS data. Please pick the way you want the installer to set up OpenCATS:'. Below this text are three radio button options: 'New Installation (Recommended)' (selected), 'Demonstration Installation', and 'Restore Installation from Backup'. At the bottom of this section is a note: 'You can always run the installer again to clear the database and choose a different option.' and a 'Next -->' button.

### Step 4 Setup resume indexing

---

**Note:** This is only if you have root/administrative access, or are in a REALLY flexible shared hosting environment. Most major shared hosting companies will not install this software for you. So if you do not have root/administrative access, just skip this step.

---

---

**Note:** If you are running on a local machine, on a self-hosted server, VPS, or on a web host that will install packages for you, you can use this functionality.

---

If you followed the steps above you may safely accept the default locations for Antiword, PDF2Text, HTML2Text and UnRTF.

Click `Test configuration` or `skip this step`. If it's all green, proceed.

## OpenCATS

Applicant Tracking System

Step 1: System Check

Step 2: Database Connectivity

Step 3: Loading Data

**Step 4: Setup Resume Indexing**

Step 5: Mail Settings

Step 6: Loading Extras


Step 7: Finishing Installation

Restart Install


### Resume Indexing Configuration

OpenCATS can index resumes for advanced searching with the assistance of external document processing software. You need to configure the software below to enable resume indexing.


[Where can I get this software?](#)

☒  .doc file (Microsoft Word Document)


Path to Antiword Executable:

☒  .pdf file (Adobe Acrobat Document)

Path to PDFTotext Executable:

☒  .html file (Hypertext Markup Document)

Path to Html2Text Executable:

☒  .rtf file (Rich Text Document)

Path to UnRTF Executable:

Test Configuration

Skip this Step

### Test Results

Antiword binary '/path/to/antiword' does not exist.

Pdftotext binary '/path/to/pdfotext' does not exist.

Html2Text binary '/path/to/html2text' does not exist.

UnRTF depends on Html2Text and can not execute.

One or more tests failed. Please correct the errors and try again.

If you have any questions, visit the OpenCATS forums at <http://www.opencats.org/forums/>.

Retry Installation

### Step 5 Mail Settings

OpenCATS can send emails. If you don't want to use it, you don't have to. OpenCATS works great either way!

Choose an option from the Mail Support drop-down bar, fill the necessary information in (if you are using it) and click Next

# OpenCATS

Applicant Tracking System

The screenshot shows the 'Mail Settings' step of the OpenCATS installation. On the left is a sidebar with a list of steps: Step 1: System Check, Step 2: Database Connectivity, Step 3: Loading Data, Step 4: Setup Resume Indexing, Step 5: Mail Settings (highlighted), Step 6: Loading Extras, and Step 7: Finishing Installation. Below the list is a 'Restart Install' button. The main area is titled 'Mail Settings' and contains the following text: 'Please enter your e-mail address (for where OpenCATS e-mails should be replied to, etc.).' followed by an 'E-mail:' label and a text box containing 'admin@testdomain.com'. Below this is a paragraph: 'OpenCATS sends automatic E-Mails on different events. Please choose the mechanism for E-Mail delivery via OpenCATS.' followed by a 'Mail Support:' label and a dropdown menu showing 'SMTP w/Authorization'. Below the dropdown are four labels and text boxes: 'SMTP Host:' with 'localhost', 'SMTP Port:' with '587', 'SMTP Username:' with 'user', and 'SMTP Password:' with 'password'. A 'Next -->' button is in the bottom right corner.

## Step 6 Loading extras

Don't forget to set the time zone to your area!

**Warning:** If you forget to set the time zone ALL of the timestamps on every note in OpenCATS will be wrong. Set the time zone correctly. You will thank us...

Choose the date format you like best

(United States only) choose to install (if you want) zip code lookup

Click next

# OpenCATS

Applicant Tracking System

Step 1: System Check  
Step 2: Database Connectivity  
Step 3: Loading Data  
Step 4: Setup Resume Indexing  
Step 5: Mail Settings  
**Step 6: Loading Extras**  
Step 7: Finishing Installation

[Restart Install](#)

### Loading Extras - Localization

Please choose your time zone.  
GMT-06:00 Central Time (US and Canada)

Please choose your preferred date format.  
MM-DD-YYYY (US)

### Loading Extras - Choose Extras

OpenCATS comes with some optional features. You can enable them below.  
To add or remove features in the future, run the installer again.

Feature Name	Install	Do Not Install
<a href="#">United States Zip Code Lookup</a>	<input type="radio"/>	<input checked="" type="radio"/>

[Next -->](#)

## Step 7 Finishing installation

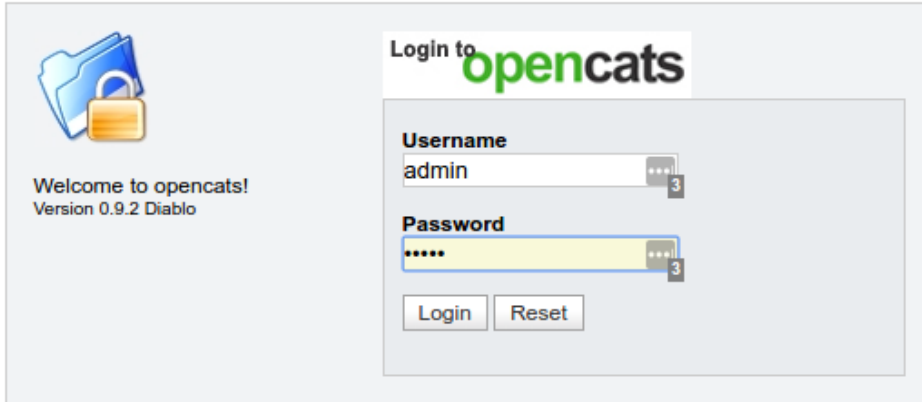
Runs through the installation process. You should see a box and some pretty bars moving. It shouldn't take long.

---

**Note:** The default username and password are: admin/admin or admin/cats (all lowercase) depending on your OpenCATS version

---

Click **Start OpenCATS** for your login screen.

The image shows the OpenCATS login page. On the left, there is a blue folder icon with a yellow padlock. Below it, the text reads "Welcome to opencats!" and "Version 0.9.2 Diablo". On the right, there is a login box with the title "Login to opencats". Inside the box, there are two input fields: "Username" with the value "admin" and "Password" with five asterisks. Both fields have a small icon with the number "3" next to them. Below the input fields are two buttons: "Login" and "Reset".

Welcome to opencats!  
Version 0.9.2 Diablo

Login to **opencats**

**Username**  
admin

**Password**  
\*\*\*\*\*


Login Reset

Join the Conversation - [opencats forums](#).

© 2005 - 2007 Cognizo Technologies, Inc.  
Based upon original work and Powered by [CATS](#).

**Success!!**

Your brand new OpenCATS applicant System!



[Logout](#)  
 CATS Administrator <admin> (testdomain.com) **Administrator**

[Dashboard](#)
[Activities](#)
[Job Orders](#)
[Candidates](#)
[Companies](#)
[Contacts](#)
[Lists](#)
[Calendar](#)
[Reports](#)
[Settings](#)

Quick Search:

[My Recent Calls](#)
[My Upcoming Calls](#)
[My Upcoming Events](#)

**Recent Hires**

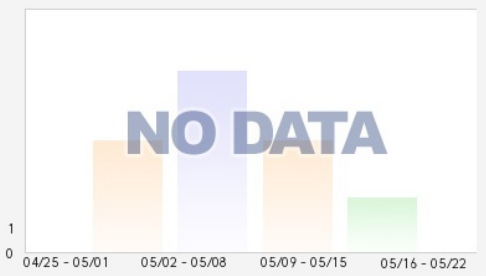
Name	Company	Recruiter	Date
NO DATA			

**Hiring Overview**

Weekly

Monthly

Yearly



Submissions

Interviews

Hires

**Important Candidates (Submitted, Interviewing, Offered in Active Job Orders) - Page 1 (0 Items)**

First Name	Last Name	Status	Position	Company	Modified ▲
NO DATA					

CATS Version 0.9.2 Diablo. Powered by **CATS**.

Server Response Time: 0.05 seconds.  
© 2005 - 2007 Cognizo Technologies, Inc.



---

## Install on Linux

---

These instructions are for LAMP (Linux Apache MySQL/MariaDB Php) environment only. Instructions are provided for CentOS7, Debian8, and Ubuntu 16.04.

### 6.1 Installation-Unix/Linux Prerequisites

You must have LAMP server software installed and running.

---

**Note:** mysql and mariadb are basically the same software with different names. You can use either, just change the commands to the appropriate name.

---

### 6.2 CentOS7-Installing MySQL 5/Mariadb

- # yum check-update
- # yum -y install mariadb-server mariadb
- # systemctl start mariadb.service
- # systemctl enable mariadb.service
- # mysql\_secure\_installation
- Skip to *Securing MySQL/MariaDB* section below.

### 6.3 Debian8/Ubuntu16.04-Installing MySQL 5/Mariadb

- \$ sudo apt-get update
- \$ sudo apt-get install mariadb-server mariadb-client

---

**Note:** If you are asked to provide a MySQL/MariaDB password, enter it and write it down. You'll need it later

---

- \$ mysql\_secure\_installation
- Skip to *Securing MySQL/MariaDB* section below.

## 6.4 Securing MySQL/MariaDB

---

**Note:** In order to log into MariaDB to secure it, we'll need the current password for the root user. If you've just installed MariaDB, and you haven't set the root password yet, **the password will be blank**, so you should just press enter here.

---

- Set root password? [Y/n] Y
- New password: <--yourmariadbpassword (Remember this or write it down!)
- Re-enter new password: <--yourmariadbpassword (Remember this or write it down!)
- Password updated successfully!
- Reloading privilege tables..... Success!
- Remove anonymous users? [Y/n] Y
- Disallow root login remotely? [Y/n] Y
- Remove test database and access to it? [Y/n] Y
- Reload privilege tables now? [Y/n] Y
- All done! If you've completed all of the above steps, your MariaDB,installation should now be secure. Thanks for using MariaDB!

## 6.5 CentOS7-Installing Apache2

- # yum install httpd
- # systemctl start httpd.service
- # systemctl enable httpd.service

---

**Note:** CentOS 7.0 uses Firewall-cmd, so we will customize it to allow external access to port 80 (http) and 443 (https).

---

- # firewall-cmd --permanent --zone=public --add-service=http
- # firewall-cmd --permanent --zone=public --add-service=https
- # firewall-cmd --reload
- Skip to *Check for success-Apache* Section.

## 6.6 Debian8/Ubuntu16.04-Installing Apache2

- \$ sudo apt-get install apache2

## 6.7 Check for success-Apache

**Note:** In this tutorial, we use the hostname `server1.example.com` with the IP address `192.168.0.100`. These settings might differ for you, so you have to replace them where appropriate.

- Now direct your browser to <http://192.168.0.100>, and you should see the Apache2 placeholder page:



## 6.8 CentOS7-Installing PHP5

- `# yum -y install php`
- `# systemctl restart httpd.service`
- Skip to *Testing PHP5 / Getting Details About Your PHP5 Installation* section

## 6.9 Debian8/Ubuntu16.06-Installing PHP5

- `$ sudo apt-get install php5`
- `$ sudo service apache2 restart`

## 6.10 Testing PHP5 / Getting Details About Your PHP5 Installation

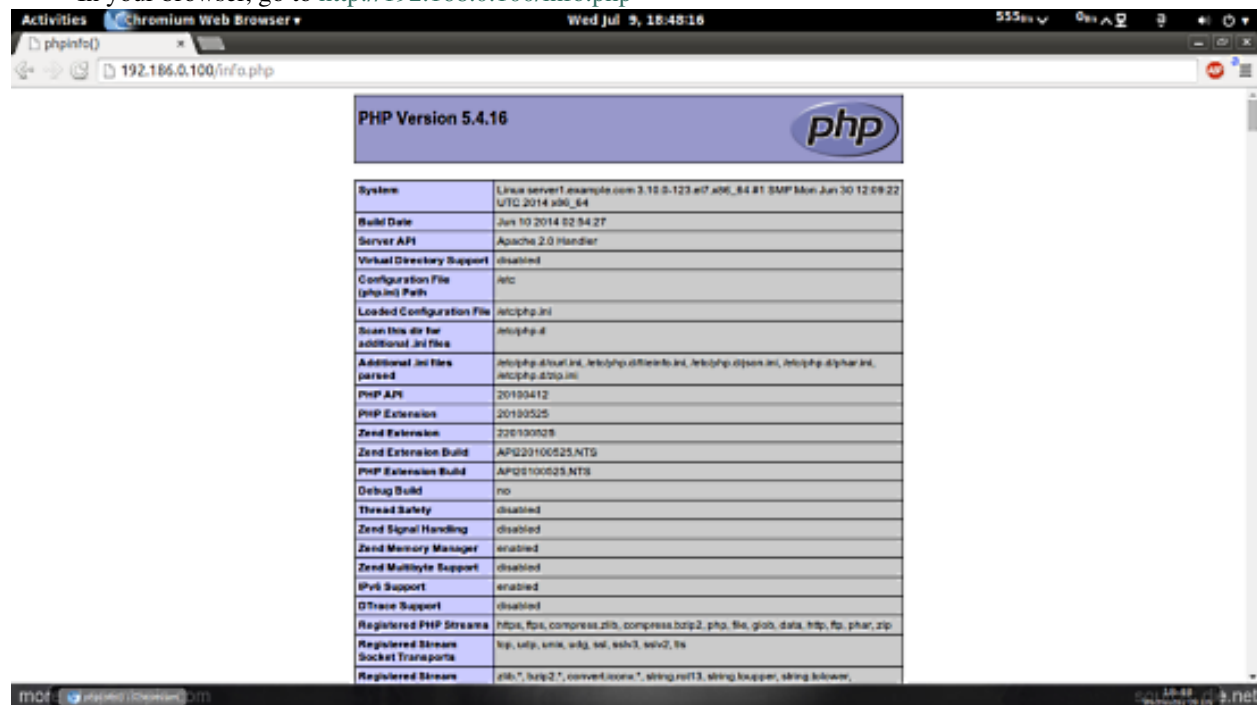
**Note:** The document root of the default website is `/var/www/html`. We will now create a small PHP file (`info.php`) in that directory and call it in a browser. The file will display lots of useful details about our PHP installation, such as the

installed PHP version.

- # `vi /var/www/html/info.php` (you can also use nano instead of vi)
- Type or paste the following into it and save as info.php:

```
<?php
phpinfo();
?>
```

- (Debian/Ubuntu) \$ `sudo service apache2 restart`
- (CentOS) # `systemctl restart httpd.service`
- In your browser, go to <http://192.168.0.100/info.php>



If you see this screen, everything is good. Proceed.

**Note:** If you get any PHP errors during the OpenCATS install, this screen can help you see what php modules are installed and loaded.

## 6.11 CentOS7-Getting MySQL Support In PHP5

- # `yum search php`
- You will need php-mysql, php-gd and php-soap
- # `yum -y install php-mysql php-gd php-soap`
- # `systemctl restart httpd.service`
- Now reload <http://192.168.0.100/info.php> in your browser and you should see the new php modules listed

- Skip to *Setting up your MySQL/MariaDB database* section

## 6.12 Debian8/Ubuntu16.04-Getting MySQL Support In PHP5

- `$sudo apt-cache search php-`
- You will need `php-mysql`, `php-gd` and `php-soap`
- `$ sudo apt-get install php-mysql php-gd php-soap`
- `$ sudo service apache2 restart`
- Now reload <http://192.168.0.100/info.php> in your browser and you should see the new php modules listed

## 6.13 Setting up your MySQL/MariaDB database

---

**Note:** This is the backend database that stores all your OpenCATS information. You likely will NOT be messing with this much after installation unless you choose to. The login/password you set up here will NOT be the same as your login/password for OpenCATS.

---



---

**Note:** Make sure you remember or write down your login/password. You'll need it in a new minutes.

---

- `$ mysql -u root -p` (If that doesn't work, try `mysql -u root -yourmariadbpasswordfromearlier`)
- You should see a prompt like this: `mysql>`
- `mysql> CREATE USER 'yourusername'@'localhost' IDENTIFIED BY 'yourmariadbpassword';`
- `mysql> CREATE DATABASE cats;`
- `mysql> GRANT ALL PRIVILEGES ON cats.* TO 'cats'@'localhost' IDENTIFIED BY 'yourmariadbpassword';`
- `mysql> exit;`

---

**Note:** Make sure you don't forget the ; on the end of every line!

---

## 6.14 Server and Directory permissions

### CentOS

- `# chown apache:apache cats`
- `# chown -R apache:apache cats-x.x.x/`

**Warning:** make sure this is set to **EXACTLY** the name of your OpenCATS directory, default for version 9.1a would be `opencats-0.9.1a/`

- `# chmod 770 cats-x.x.x/attachments`

### Debian/Ubuntu

- `$ sudo chown www-data:www-data cats-x.x.x/`

**Warning:** make sure this is set to **EXACTLY** the name of your OpenCATS directory, default for version 9.1a would be `opencats-0.9.1a/`

- `$ sudo chown -R www-data:www-data cats-x.x.x/`
- `$ sudo chmod 770 cats-x.x.x/attachments`

---

## Install resume indexing tools

---

### 7.1 CentOS7

---

**Note:** Some of these may already be in your repositories. Perform a `yum search` for the packages and install if they are there. If not, install from the links below.

---

- [Antiword](#)
- PdfToText, install Poppler-utils (contains pdftotext): [poppler-utils](#)
- [html2text](#)
- [UnRTF](#)

---

**Note:** These software packages may have dependencies. If you get installation errors, go to the linked pages and research/install the dependencies.

---

- Skip to *Install the OpenCATS software* section

### 7.2 Debian8/Ubuntu16.06

- `$ sudo apt-get install antiword poppler-utils html2text unrtf`





---

## Install the OpenCATS software

---

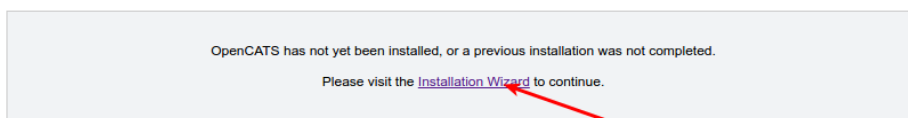
In your browser, go to localhost/OpenCATS-opencats-0.9.3/ (Or use the address of your server or VPS in place of “localhost”).

---

**Note:** If you have already attempted to install OpenCATS and the installer doesn’t load, check to see if there is a file called ‘INSTALL\_BLOCK’ in the OpenCATS directory. Delete it to allow the installer to run.

---

Click: Installation Wizard



### Step 1: System Connectivity

This step makes sure you have the required server environment set up correctly.

---

**Note:** Green = good.

---

---

**Note:** Yellow = OpenCATS will work, but some functions may not.

---

**Warning:** Red = Bad You can’t continue the installation until a server environment issue is fixed.

(I am setting up this example instance of OpenCATS in a shared hosting service. I do not have command line access and can not install the required modules to get rid of the yellow areas. If you are running OpenCATS locally on your

computer, or you have root access to a server, VPS, etc., you can install these extra modules and should see all green before continuing.)

If you see all green and/or yellow, click **Next**

Step 2: Database Connectivity	<p>This process will help you set up the OpenCATS environment for the first time. Before we begin, OpenCATS needs to run some tests on your system to make sure that your web environment can support OpenCATS and is configured properly.</p> <p><b>Test Results</b></p> <table><tr><td>PHP version is 5.6.17.</td></tr><tr><td>PHP.ini: magic_quotes_runtime is disabled.</td></tr><tr><td>PHP.ini: register_globals is disabled.</td></tr><tr><td>PHP MySQL extension (mysql) is loaded.</td></tr><tr><td>PHP Sessions extension (session) is loaded.</td></tr><tr><td>PHP PCRE regular expressions extension (pcre) is loaded.</td></tr><tr><td>PHP CType string classification extension (ctype) is loaded.</td></tr><tr><td>PHP GD image manipulation library extension (gd) is loaded.</td></tr><tr><td><b>PHP LDAP library extension (ldap) is not loaded.</b> Check your settings in php.ini.  OpenCATS will function without LDAP, but will not authenticate from a LDAP service  Under certain GNU/Linux distributions, the PHP LDAP extension is a separate package.  <b>Ubuntu/Debian:</b> Run "apt-get install php5-ldap" and restart your webserver.  <b>Fedora/CentOS/RHEL:</b> Run "dnf install php-ldap" or "yum install php-ldap" and restart your webserver.</td></tr><tr><td></td><td><b>PHP SOAP extension (soap) is not loaded.</b> Check your settings in php.ini.  OpenCATS will function without SOAP, but CATS Professional functionality will not be supported.  Under certain Linux / BSD distributions, the PHP SOAP extension is a separate package.  <b>Ubuntu:</b> Run "apt-get install php-soap" and restart your webserver.  <b>Debian:</b> Run "apt-get install php5-soap" and restart your webserver.  <b>FreeBSD:</b> Install the php5-soap port, or configure SOAP support in the php-extensions port and restart your webserver.</td></tr><tr><td></td><td>PHP zip extension is loaded.</td></tr><tr><td></td><td>Directory ./attachments/ is readable (permissions: 0755).</td></tr><tr><td></td><td>Directory ./attachments/ is writeable (permissions: 0755).</td></tr><tr><td></td><td>Creating a file within ./attachments/ succeeded.</td></tr><tr><td></td><td>Directories can be created inside ./attachments//.</td></tr><tr><td></td><td>Configuration file ./config.php is writable.</td></tr><tr><td></td><td>Creating a file within ./ succeeded.</td></tr><tr><td></td><td><b>One or more tests issued a warning. You may still proceed, but read the warnings carefully and address them if you can.</b>  If you have any questions, visit the OpenCATS forums at <a href="http://www.opencats.org/forums/">http://www.opencats.org/forums/</a>.</td></tr></table>	PHP version is 5.6.17.	PHP.ini: magic_quotes_runtime is disabled.	PHP.ini: register_globals is disabled.	PHP MySQL extension (mysql) is loaded.	PHP Sessions extension (session) is loaded.	PHP PCRE regular expressions extension (pcre) is loaded.	PHP CType string classification extension (ctype) is loaded.	PHP GD image manipulation library extension (gd) is loaded.	<b>PHP LDAP library extension (ldap) is not loaded.</b> Check your settings in php.ini.  OpenCATS will function without LDAP, but will not authenticate from a LDAP service  Under certain GNU/Linux distributions, the PHP LDAP extension is a separate package.  <b>Ubuntu/Debian:</b> Run "apt-get install php5-ldap" and restart your webserver.  <b>Fedora/CentOS/RHEL:</b> Run "dnf install php-ldap" or "yum install php-ldap" and restart your webserver.		<b>PHP SOAP extension (soap) is not loaded.</b> Check your settings in php.ini.  OpenCATS will function without SOAP, but CATS Professional functionality will not be supported.  Under certain Linux / BSD distributions, the PHP SOAP extension is a separate package.  <b>Ubuntu:</b> Run "apt-get install php-soap" and restart your webserver.  <b>Debian:</b> Run "apt-get install php5-soap" and restart your webserver.  <b>FreeBSD:</b> Install the php5-soap port, or configure SOAP support in the php-extensions port and restart your webserver.		PHP zip extension is loaded.		Directory ./attachments/ is readable (permissions: 0755).		Directory ./attachments/ is writeable (permissions: 0755).		Creating a file within ./attachments/ succeeded.		Directories can be created inside ./attachments//.		Configuration file ./config.php is writable.		Creating a file within ./ succeeded.		<b>One or more tests issued a warning. You may still proceed, but read the warnings carefully and address them if you can.</b>  If you have any questions, visit the OpenCATS forums at <a href="http://www.opencats.org/forums/">http://www.opencats.org/forums/</a> .
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Step 3: Loading Data																												
Step 4: Setup Resume Indexing																												
Step 5: Mail Settings																												
Step 6: Loading Extras																												
Step 7: Finishing Installation																												

Restart Install

Next -->

### Step 2: Database connectivity

Enter your OpenCATS MySQL/MariaDB database name, MySQL/MariaDB database username, MySQL/MariaDB database password, and MySQL/MariaDB database host address in these boxes.

**Note:** If you are running OpenCATS locally on your computer, or on some shared hosts, the host address will be localhost. If your server, VPS (some shared hosting too), you will need to enter the specific address to access.

Click Test Database Connectivity

If the MySQL/MariaDB information is set up and entered correctly, you should have all green. If you see red, something needs to be corrected or set up correctly.

## OpenCATS

Applicant Tracking System

The screenshot shows the 'Database Configuration' step of the OpenCATS installer. On the left is a sidebar with steps 1 through 7, with 'Step 2: Database Connectivity' highlighted. The main area contains instructions, input fields for database details, a 'Test Database Connectivity' button, and a 'Test Results' section with a green background showing successful test outcomes. A 'Next -->' button is at the bottom right.

**Step 2: Database Connectivity**

The OpenCATS installer needs some information about your MySQL database to continue the installation. If you do not know this information, then please contact your website host or administrator. Please note that this is probably NOT the same as your FTP login information!

Database Name: \*

Database User: \*

Database Password:

Database Host: \*  (usually localhost)

**Test Results**

- MySQL connection was successful.
- MySQL version is 5.5.42.
- Database 'linuxrec\_opencatstest' selected.
- Can create 'testtable' table.
- Can insert into 'testtable' table.
- Can update 'testtable' table.
- Can delete from 'testtable' table.
- Can drop table 'testtable'.

All tests passed successfully!

### Step 3: Loading Data

For a new installation, select New Installation, then next

---

**Note:** Demonstration Installation will autopopulate OpenCATS with general example clients, candidates, job orders, etc. There's no reason to use this in my opinion.

---

---

**Note:** Restore installation from backup will be covered in a future tutorial

---

# OpenCATS

Applicant Tracking System

The screenshot shows the OpenCATS installer window. On the left, a vertical list of steps is shown: Step 1: System Check, Step 2: Database Connectivity, Step 3: Loading Data (highlighted), Step 4: Setup Resume Indexing, Step 5: Mail Settings, Step 6: Loading Extras, and Step 7: Finishing Installation. Below this list is a 'Restart Install' button. The main area is titled 'Loading Data - Empty Database' and contains the text: 'The installer is ready to set up your OpenCATS data. Please pick the way you want the installer to set up OpenCATS:'. There are three radio button options: 'New Installation (Recommended)' (selected), 'Demonstration Installation', and 'Restore Installation from Backup'. Below these options is a note: 'You can always run the installer again to clear the database and choose a different option.' At the bottom right of the main area is a 'Next -->' button.

## Step 4 Setup resume indexing

Click `Test configuration` or `skip this step`. If it's all green, proceed. If you did not install these packages earlier, skip this step.

# OpenCATS

Applicant Tracking System


Step 1: System Check  
Step 2: Database Connectivity  
Step 3: Loading Data  
**Step 4: Setup Resume Indexing**  
Step 5: Mail Settings  
Step 6: Loading Extras  
Step 7: Finishing Installation


Restart Install


### Resume Indexing Configuration


OpenCATS can index resumes for advanced searching with the assistance of external document processing software. You need to configure the software below to enable resume indexing.

[Where can I get this software?](#)

☒  .doc file (Microsoft Word Document)  
Path to Antiword Executable:

☒  .pdf file (Adobe Acrobat Document)  
Path to PDFTotext Executable:

☒  .html file (Hypertext Markup Document)  
Path to Html2Text Executable:

☒  .rtf file (Rich Text Document)  
Path to UnRTF Executable:

Test Configuration
Skip this Step

### Test Results

Antiword binary '/path/to/antiword' does not exist.  
Pdftotext binary '/path/to/pdftotext' does not exist.  
Html2Text binary '/path/to/html2text' does not exist.  
UnRTF depends on Html2Text and can not execute.

One or more tests failed. Please correct the errors and try again.  
  
If you have any questions, visit the OpenCATS forums at <http://www.opencats.org/forums/>.

Retry Installation

**Note:** Make sure you change the path to executables paths to the correct path on your system! Linux is usually /usr/bin/applicationname

## Step 5 Mail Settings

OpenCATS can send emails. If you don't want to use it, you don't have to. OpenCATS works great either way!

Choose an option from the Mail Support drop-down bar, fill the necessary information in (if you are using it) and click Next

# OpenCATS

Applicant Tracking System

The screenshot shows the 'Mail Settings' step of the OpenCATS installation. On the left is a sidebar with a list of steps: Step 1: System Check, Step 2: Database Connectivity, Step 3: Loading Data, Step 4: Setup Resume Indexing, Step 5: Mail Settings (highlighted), Step 6: Loading Extras, and Step 7: Finishing Installation. Below the list is a 'Restart Install' button. The main area is titled 'Mail Settings' and contains the following text: 'Please enter your e-mail address (for where OpenCATS e-mails should be replied to, etc.).' Below this is an 'E-mail:' label followed by a text box containing 'admin@testdomain.com'. Further down, it says: 'OpenCATS sends automatic E-Mails on different events. Please choose the mechanism for E-Mail delivery via OpenCATS.' This is followed by a 'Mail Support:' label and a dropdown menu set to 'SMTP w/Authorization'. Below the dropdown are four text boxes: 'SMTP Host:' with 'localhost', 'SMTP Port:' with '587', 'SMTP Username:' with 'user', and 'SMTP Password:' with 'password'. A 'Next -->' button is located at the bottom right of the form.

## Step 6 Loading extras

Don't forget to set the time zone to your area!

**Warning:** If you forget to set the time zone ALL of the timestamps on every note in OpenCATS will be wrong. Set the time zone correctly. You will thank us...

Choose the date format you like best

(United States only) choose to install (if you want) zip code lookup

Click next

# OpenCATS

Applicant Tracking System

Step 1: System Check  
Step 2: Database Connectivity  
Step 3: Loading Data  
Step 4: Setup Resume Indexing  
Step 5: Mail Settings  
**Step 6: Loading Extras**  
Step 7: Finishing Installation

[Restart Install](#)

### Loading Extras - Localization

Please choose your time zone.  
GMT-06:00 Central Time (US and Canada)

Please choose your preferred date format.  
MM-DD-YYYY (US)

### Loading Extras - Choose Extras

OpenCATS comes with some optional features. You can enable them below.  
To add or remove features in the future, run the installer again.

Feature Name	Install	Do Not Install
<a href="#">United States Zip Code Lookup</a>	<input type="radio"/>	<input checked="" type="radio"/>

[Next -->](#)

## Step 7 Finishing installation

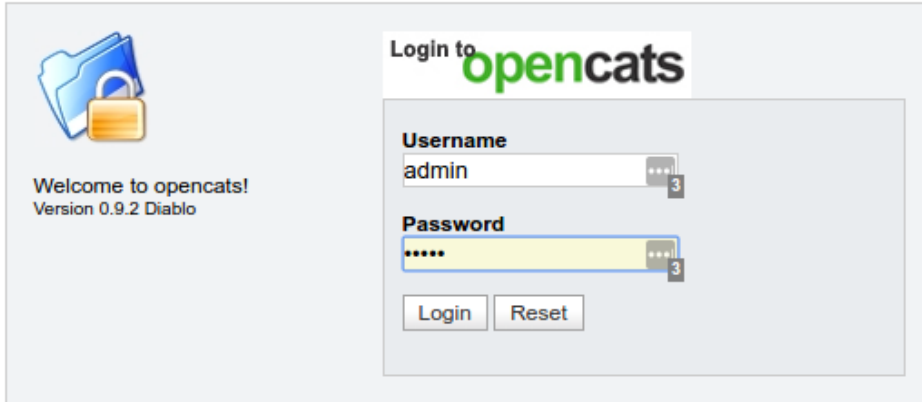
Runs through the installation process. You should see a box and some pretty bars moving. It shouldn't take long.

---

**Note:** The default username and password are: admin/admin (all lowercase)

---

Click **Start OpenCATS** for your login screen.

The image shows the OpenCATS login interface. On the left, there is a blue folder icon with a yellow padlock, and the text "Welcome to opencats!" and "Version 0.9.2 Diablo". On the right, there is a login box with the title "Login to opencats". Inside the box, there are two input fields: "Username" with the value "admin" and "Password" with masked characters "\*\*\*\*\*". Below the fields are "Login" and "Reset" buttons. There are small speech bubble icons with the number "3" next to the input fields.

Welcome to opencats!  
Version 0.9.2 Diablo

Login to **opencats**

**Username**  
admin

**Password**  
\*\*\*\*\*

Login Reset

Join the Conversation - [opencats forums](#).

© 2005 - 2007 Cognizo Technologies, Inc.  
Based upon original work and Powered by [CATS](#).

**Success!!**

Your brand new OpenCATS applicant System!



**opencats**  
open. online. free.

CATS Administrator <admin> (testdomain.com) Administrator [Logout](#)

Dashboard Activities Job Orders Candidates Companies Contacts Lists Calendar Reports Settings

Quick Search:  Go

My Recent Calls My Upcoming Calls My Upcoming Events

Recent Hires

Name	Company	Recruiter	Date
NO DATA			

Hiring Overview

Weekly  
Monthly  
Yearly

Submissions  
Interviews  
Hires

Important Candidates (Submitted, Interviewing, Offered in Active Job Orders) - Page 1 (0 Items)

First Name	Last Name	Status	Position	Company	Modified ▲
NO DATA					

CATS Version 0.9.2 Diablo. Powered by **CATS**.

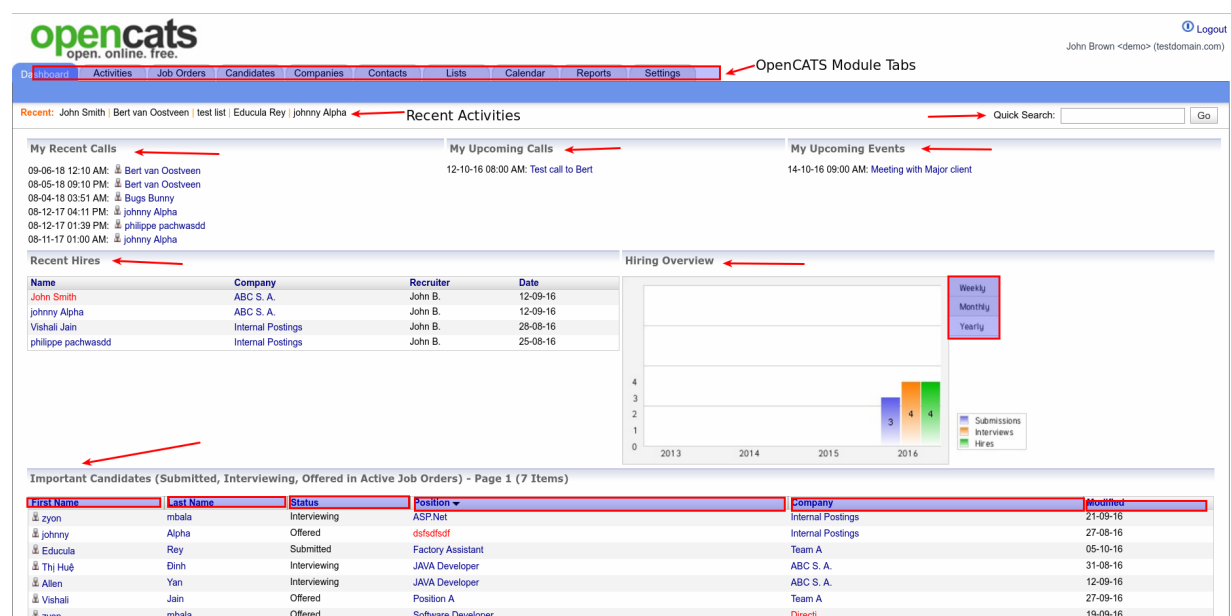
Server Response Time: 0.05 seconds.  
© 2005 - 2007 Cognizo Technologies, Inc.



## Screens In-Depth

In this section, we will go through each of the OpenCATS screens in depth and go over all of the various functions.

## 9.1 OpenCATS dashboard/home screen



**Note:** The OpenCATS dashboard (home screen) is broken up into three rows at the top and a grid of six sections below.

- **The main OpenCATS module tabs:** The main navigation tabs.
- **Recent:** Your five most recently viewed candidates/contacts. Names are clickable for quick access.
- **Quick Search:** Search for candidate/contact name, job title, and Company name
- **My Recent Calls:** Most recent candidate/contact calls. Names are clickable for quick access.
- **My upcoming calls:** List of upcoming, scheduled calls, IF scheduled in OpenCATS.
- **My upcoming events:** List of upcoming, scheduled calls, IF scheduled in OpenCATS.
- **Recent Hires:** Short list of your company's most recent hires

- **Hiring Overview:** Overview of submission/interviews/hires. You can select weekly, monthly or yearly tabs on the right
- **Important Candidates:** Small overview of some recent candidate activity. The columns in this section are adjustable by dragging the column title left or right.

## 9.2 Activities Screen

The screenshot displays the OpenCATS web application interface. At the top, there's a navigation bar with tabs: Dashboard, Activities, Job Orders, Candidates, Companies, Contacts, Lists, Calendar, Reports, and Settings. Below the navigation bar, a 'Recent' section lists recent activities. The main area is titled 'Activities' and shows a table of candidate activities. The table has columns: Date, First Name, Last Name, Regarding, Activity, Notes, and Entered By. The table lists various activities, including calls, status changes, and candidate additions. At the bottom of the table, there are filters for Action, time frame, rows per page, and a filter dropdown.

The activities screen gives you an overview of recent candidate, company and contact activities.

**Note:** The rows at the top always stay the same in OpenCATS (Main navigation tabs, recent, and quick search). We won't cover that again in the documentation.

- **Time-frame of results:** Click these to filter your results by day, week, month, etc.
- **Rows per page:** Click the drop-down bar to change the amount of results per screen. 15, 30, 50, or 100
- **Filter:** Options to filter results by Date, Regarding, Activity, Notes, Entered By
- **Activity columns:**
  - **Show Columns:** Select which columns to be visible in the activities grid
  - **Rearrange Columns:** Columns can be moved left and right by grabbing the column name and moving it left or right.
  - **Sort Columns:** Each column can also be sorted alphabetically by clicking the column title at the top of the column.

## 9.3 Job Orders Screen

Dashboard Activities Job Orders Candidates Companies Contacts Lists Calendar Reports Settings

Add Job Order Search Job Orders

Recent: asdf | Manager 1 | Head of R&D | Embarqué | nguyen a

Quick Search:  Go

Job Orders: Home

Active / On Hold / Full Only My Job Orders Only Hot Job Orders

Job Orders - Page 1 (32 Items) (Active / On Hold / Full)

ID	Title	Company	Type	Status	Created	Age	S	P	Recruiter	Owner
38	asdf	Internal Postings	H	Active	10-10-16	1	0	0	John B.	John B.
37	Embarqué	Internal Postings	C2H	Active	07-10-16	4	0	1	CATS A.	CATS A.
36	accountant	Internal Postings	H	Active	04-10-16	7	0	0	John B.	John B.
35	Factory Assistant	Team A	H	Active	04-10-16	7	1	2	John B.	John B.
34	Head of R&D	aa com	H	Active	03-10-16	8	0	5	John B.	John B.
33	CCE	Hinduja	H	Active	01-10-16	10	1	1	John B.	John B.
32	asdasdadad	aa com	H	Active	01-10-16	10	0	0	John B.	John B.
31	Test Questionnaire	aa com	H	Active	30-09-16	11	0	0	CATS A.	John B.
30	drótkoszorús	opencats	H	Active	30-09-16	11	0	0	John B.	John B.
29	ITO1	aa com	H	Active	28-09-16	13	0	0	John B.	John B.
28	ITO1	aa com	H	Active	28-09-16	13	0	0	John B.	John B.
27	senior engineer	Internal Postings	H	Active	27-09-16	14	0	1	John B.	John B.
26	my test job	Internal Postings	H	Active	26-09-16	15	0	2	John B.	John B.
25	Software Engineer	Internal Postings	H	Active	22-09-16	19	0	3	John B.	John B.
24	manager	Team A	H	Active	21-09-16	20	0	2	John B.	John B.

Action

< First << Prev Page 1 of 3 Next >> Last > A B C D E F G H I J K L M N O P Q R S T U V W X Y Z ALL

The Job Orders screen is job order specific. It is where all the job orders are.

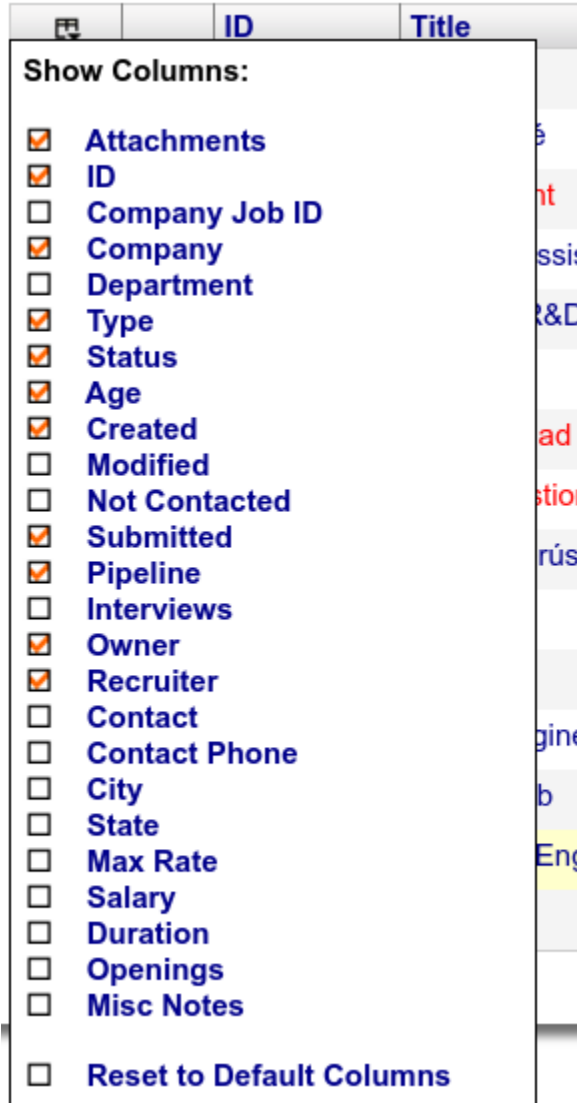
**Note:** The job order screen is structured similarly to the Activities screen. So we won't go through the same features again.

In the top, right, highlighted row, we have the following:

- **Active/On Hold/Full Drop-down box:** This allows you to filter your results based on the status of the job order. Options are: Active/On Hold/Full, Active, On Hold/Full, Closed/Canceled, Upcoming/Lead, ALL.
- **Only My Job Orders:** This will return results that are only your job orders.
- **Only Hot Job Orders:** This will return results that are only marked as Hot Jobs.

**Show Columns (highlighted box, upper right corner of grid):**

There are quite a few options here to select or deselect. The checked options will include in the job order screen information. See image below.



---

**Note:** As with the other screens, all columns can be moved left and right, as well as sorted alphabetically.

---

The last thing to note on the Job order screen is the action button in the bottom left corner.

**Action:**

- Clicking the action button will allow you to export results to a .csv sheet, or import results to a hot-list within the OpenCATS system. We will go into those further later in the documentation.

**Add specified job orders to an OpenCATS Hot-list, or export them to a CSV:**

- Select the checkbox (next to `action`), this will select all the boxes on this screen only.
- Manually select specified candidates
- Then `export` or `add to list` and `click selected`.

**OR:**

- select action then add to list or export and select all to include the entire database (in this case, it would include ALL of the job orders in your OpenCATS system) in your hot-list or CSV export.

## 9.4 Candidates Screen

open. online. free.

John Brown <demo> (testdomain.com)

Dashboard Activities Job Orders Candidates Companies Contacts Lists Calendar Reports Settings

Add Candidates Search Candidates

Recent: johnny Alpha | CCE | Hinduja | Educula Rey | AAAAAAAAAA

Quick Search:  Go

Candidates: Home

< First << Prev Page 1 of 3 Next >> Last > ☐ Only My Candidates ☐ Only Hot Candidates Filter by tag

Candidates - Page 1 (43 Items)

Rows Per Page Filter

	First Name	Last Name	E-Mail	State	Recent Status	Recent Status (Extended)	City	Key Skills	Modified	Available
<input type="checkbox"/>	shiv kumar	kamat	kamatshivkumar4@gmail.com	Maharashtra	No Contact	No Contact	pune		11-10-16	
<input type="checkbox"/>	nguyen	a	mail1@yahoo.com	84	Submitted	Submitted Internal Postings - AAAAAAAAAA	ho chi minh		11-10-16	
<input type="checkbox"/>	johnny	Alpha	secret@nsa.com		Placed	Placed ABC S. A. - Steel Erector		forklift, quickbooks, selector	11-10-16	
<input type="checkbox"/>	Test	Test			Submitted	Submitted Team A - Factory Assistant			11-10-16	
<input type="checkbox"/>	Bert	van Oostveen			No Contact	No Contact aa com - Head of R&D		Java SAP .NET	11-10-16	
<input type="checkbox"/>	Robert	West			No Contact	No Contact aa com - Head of R&D			10-10-16	
<input type="checkbox"/>	Pirla	Coglione			No Contact	No Contact aa com - Head of R&D		Accountant	07-10-16	07-10-16
<input type="checkbox"/>	John	Smith			No Contact	No Contact Team A - Factory Assistant	Barnegat	Development	07-10-16	01-10-16
<input type="checkbox"/>	Educula	Rey			Submitted	Submitted Team A - Factory Assistant			05-10-16	
<input type="checkbox"/>	Jace	Rippin	Isadore@marilyn.biz	North Carolina			Rosenbaumtown	velit	05-10-16	08-09-16
<input type="checkbox"/>	Irudaya	Raj							04-10-16	
<input type="checkbox"/>	Mike	Christianson	mike@optimum7.com		Contacted	Contacted Internal Postings - dsfsdfsdf		Engineer	03-10-16	
<input type="checkbox"/>	Katrien	Wouters			No Contact	No Contact aa com - Head of R&D		educatie	03-10-16	01-11-16
<input type="checkbox"/>	David	Piquette			No Contact	No Contact aa com - Head of R&D			03-10-16	
<input type="checkbox"/>	philippe	pachwasdd	adel.pasch@gmail.com		Placed	Placed Internal Postings - test		revit, word, autocad	02-10-16	

☐ Action

< First << Prev Page 1 of 3 Next >> Last > ABCDEFGHIJKLMNOPQRSTUVWXYZ ALL

The main Candidates screen is laid out similarly to the others.

There are two checkboxes in upper right for filtering the results on this screen. Only My Candidates and Only Hot Candidates.


Again, there are additional options below that with the Rows Per Page dropdown and the Filter dropdown.

As before, the columns can be moved right and left by dragging the column title word at the top, and columns can be added or removed by the Show Columns (Image of a grid) in the upper left corner of the main section of the candidates screen. See example below.

[Add Candidate](#) | [Search Candidates](#)**Recent:** johnny Alpha | CCE | HInduja | Ed

## Candidates: Home

**Candidates - Page 1 (43 Items)**

	First Name	Last Name
<b>Show Columns:</b>		
<input type="checkbox"/>	Attachments	
<input checked="" type="checkbox"/>	E-Mail	
<input type="checkbox"/>	2nd E-Mail	
<input type="checkbox"/>	Home Phone	
<input type="checkbox"/>	Cell Phone	
<input type="checkbox"/>	Work Phone	
<input type="checkbox"/>	Address	
<input checked="" type="checkbox"/>	City	
<input checked="" type="checkbox"/>	State	
<input type="checkbox"/>	Zip	
<input type="checkbox"/>	Misc Notes	
<input type="checkbox"/>	Web Site	
<input checked="" type="checkbox"/>	Key Skills	
<input checked="" type="checkbox"/>	Recent Status	
<input checked="" type="checkbox"/>	Recent Status (Extended)	
<input type="checkbox"/>	Source	
<input checked="" type="checkbox"/>	Available	
<input type="checkbox"/>	Current Employer	
<input type="checkbox"/>	Current Pay	
<input type="checkbox"/>	Desired Pay	
<input type="checkbox"/>	Can Relocate	
<input type="checkbox"/>	Owner	
<input type="checkbox"/>	Created	
<input type="checkbox"/>	Reset to Default Columns	



There are different options for candidates in the `Action` button at the bottom left. You can select specific candidates, the candidates showing on the screen, or all of the candidates in OpenCATS and Add to List, Add To Pipeline, Send E-Mail, or Export.

<input type="checkbox"/>	Bert	van Oostveen	
<input type="checkbox"/>	Robert	West	
<input checked="" type="checkbox"/>	Pirla	Coglione	
<input checked="" type="checkbox"/>	John	Smith	
<input checked="" type="checkbox"/>	Educula	Rey	
<input type="checkbox"/>	Jace	Rippin	Isad
<input checked="" type="checkbox"/>	Irudaya	Raj	
<input checked="" type="checkbox"/>	Mike	Christianson	mike
<input checked="" type="checkbox"/>	Katrien	Wouters	
<input checked="" type="checkbox"/>	David	Piquette	
<input checked="" type="checkbox"/>	philippe	pachwasdd	adel

☐ Action

Add To List	Selected   All
Add To Pipeline	Selected   All
Send E-Mail	Selected   All
Export	Selected   All

- **Add to List:** Add to a hotlist
- **Add To Pipeline:** Add to a job order pipeline

- **Send E-Mail:** Means type your own email to candidate(s) or use an OpenCATS template.
- **Export:** Export selected candidates to a csv file.

## 9.5 Companies Screen

The main Companies page is very similar to the Candidates page. Everything functions the same, and it has the same options.

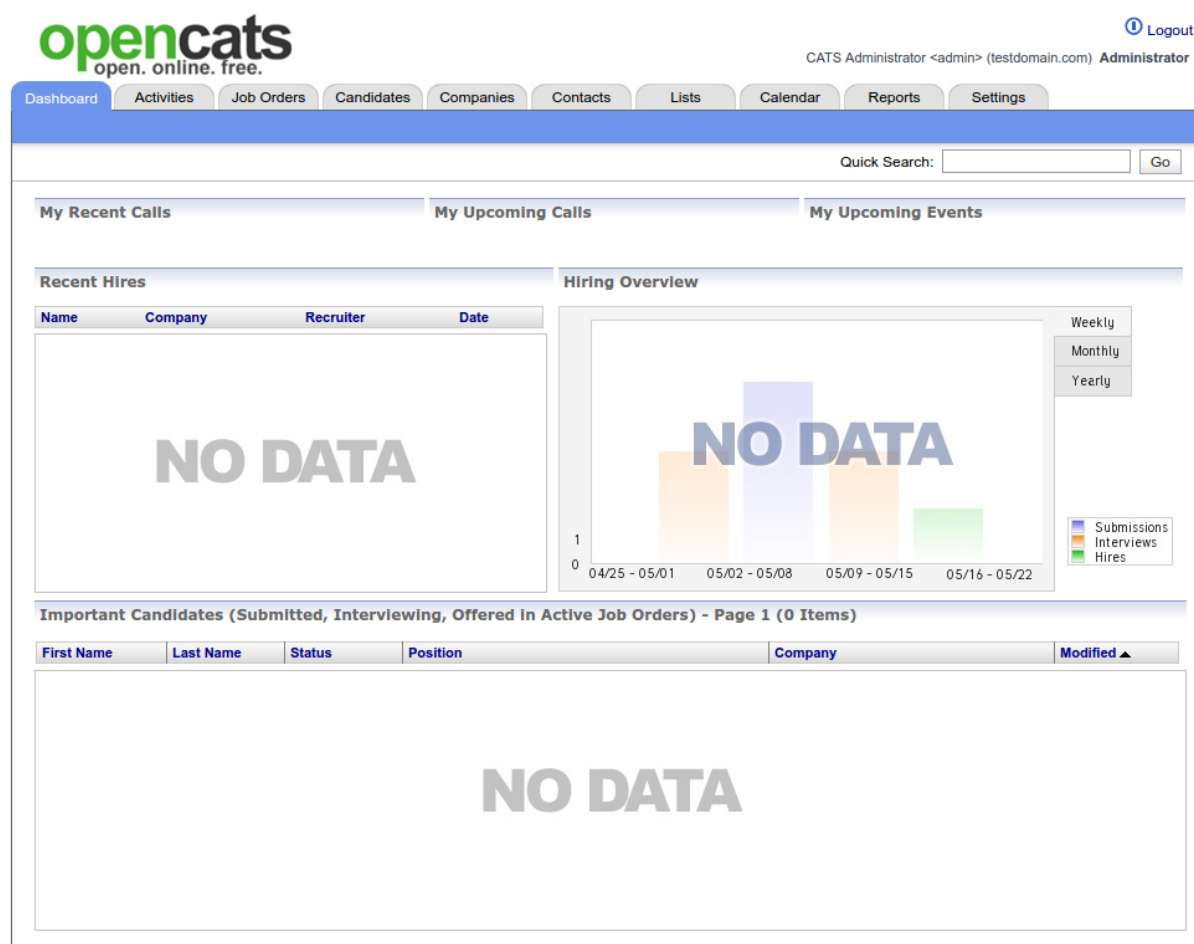
The only exception is that there are different columns available to choose in the *Show Columns* button. See image below.

The screenshot shows the OpenCATS web application interface. At the top, there's a navigation bar with tabs: Dashboard, Activities, Job Orders, Candidates, Companies (selected), Contacts, Lists, Calendar, Reports, and Settings. Below the navigation bar, there's a search bar and a 'Quick Search' field. The main content area is titled 'Companies: Home' and displays a table of companies. A 'Show Columns' dropdown menu is open on the left, showing a list of columns: Name, Jobs, City, State, Phone, Owner, Created, Modified, Web Site, Contact, and Misc Notes. The table lists several companies, including 'ABC S. A.', 'opencats', and 'Internal Postings'. The 'Internal Postings' row is highlighted in yellow.

Name	Jobs	City	State	Phone	Owner	Created	Modified	Web Site	Contact	Misc Notes
1	1				John B.	01-10-16	01-10-16			
5	5				John B.	28-09-16	28-09-16			
3	3			555-821765	John B.	20-09-16	26-09-16			has ford contract
1	1	Mumbai	Maharashtra	830-978-3095	John B.	17-09-16	17-09-16			
1	1				John B.	15-09-16	15-09-16			
1	1				John B.	13-09-16	13-09-16			
1	1	Indore	Madhya Pradesh		John B.	13-09-16	13-09-16			
					John B.	12-09-16	12-09-16			
					John B.	07-09-16	07-09-16			
	1				John B.	07-09-16	07-09-16			
ABC S. A.	3				John B.	29-08-16	29-08-16			
opencats	2				John B.	22-08-16	22-08-16			opensource
Internal Postings	14					19-11-09	19-11-09			



## Using OpenCATS-The building blocks: companies, contacts, job orders, and candidates



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### 10.1 The modules

OpenCATS is made up of the following modules:

**Home:** When you log into CATS, you will see the Home module. This is your dashboard, which lists your activities. The Dashboard is customizable from the Settings module.

**Activities:** All of your daily activities and interactions with candidates, companies and contacts are populated in this module.

**Job Orders:** All of the available Job Orders are displayed in this module. Search existing and create new Job Orders.

**Candidates:** All of the available Candidates are displayed in this module. Search existing and create new Candidates. Access your Saved Lists.

**Companies:** All of the available Companies are displayed in this module. Search existing and create new Companies.

**Contacts:** All of the available Candidates are displayed in this module. Search existing and create new Contacts. Access your Cold Call List.

**Calendar:** All scheduled events are populated in this module. By default, the Calendar shows the week view of the current week. Add new Events and access your Upcoming Events.

**Reports:** All available reports are populated in this module.

**Settings:** Options to customize your account and CATS features are available in this module. Users change your Profile, Password. Administrators access your account, change your Career Portal and E- mail configurations, and customize your dashboard, import and backup data.

---

**Note:** Let's start entering in information and populating our fantastic new OpenCATS system.

---

## 10.2 Add a new Company

Click on [Companies](#)

---

**Note:** I have already entered some test information. A new system screen will look a little different.

---

This is your main company screen. This will have an overview of all the companies in your OpenCATS system. From new leads, to active clients and old clients. They will all be here.

**Note:** For internal hiring (your company), select `Internal postings` as the client.

Click on `Add Company`

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open. online. free.

Logout  
CATS Administrator <admin> (testdomain.com) Administrator


Dashboard Activities Job Orders Candidates Companies Contacts Lists Calendar Reports Settings

Add Company Search Companies Go To My Company

Recent: Java programmer | Company ABC Quick Search:  Go

### Companies: Add Company

**Basic Information**

Company Name:   Cut and paste freeform address here.

Primary Phone:

Secondary Phone:  <--

Fax Number:

Address:

City:

State:

Postal Code:  Lookup

Web Site:

Departments: No Departments ▼

Hot Company: ☐

**Other**

Key Technologies:

Misc. Notes:

Add Company Reset Back to Companies

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There are two ways to add information into OpenCATS.

- Copy and paste it into the box labeled cut and paste free-form address here Then click the <-- button to populate the fields.
- Manually type and paste it into each field on the left.

**Note:** Don't forget to enter key technologies for the company and any miscellaneous notes that you want to save in the bottom two fields for future reference.

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CATS Administrator <admin> (testdomain.com) Administrator

Logout

Dashboard Activities Job Orders Candidates Companies Contacts Lists Calendar Reports Settings

Add Company Search Companies Go To My Company

Recent: Java programmer | Company ABC Quick Search:  Go

### Companies: Add Company

#### Basic Information

Company Name:  \*

Primary Phone:

Secondary Phone:

Fax Number:

Address:

City:

State:

Postal Code:  Lookup

Web Site:

Departments: No Departments ▼

Hot Company: ☐

Cut and paste freeform address here.

Bob's Company  
1234 Nowhere Lane  
Philadelphia, PA 12345  
web site: [www.bobscompany.com](http://www.bobscompany.com)  
Phone: 555-555-1215  
Fax: 555-555-1212

#### Other

Key Technologies:

Misc. Notes:

Add Company Reset Back to Companies

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**Warning:** The success rate of auto-populating the information fields for me has always been terrible. Sometimes it works great, sometimes it's doesn't. I usually just enter the fields one at a time manually.

If it worked, it should look like this. If some of the information did not populate, manually enter it and let's move one.

This is what you should see.

Click Add Company



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[Logout](#)  
 CATS Administrator <admin> (testdomain.com) Administrator

[Dashboard](#)
[Activities](#)
[Job Orders](#)
[Candidates](#)
[Companies](#)
[Contacts](#)
[Lists](#)
[Calendar](#)
[Reports](#)
[Settings](#)

[Add Company](#)
[Search Companies](#)
[Go To My Company](#)

Recent: Java programmer | Company ABC Quick Search:

### Companies: Add Company

**Basic Information**

Company Name:  \*

Primary Phone:

Secondary Phone:

Fax Number:

Address:

City:

State:

Postal Code:

Web Site:

Departments:

Hot Company: ☐

Cut and paste freeform address here.

Bob's Company  
1234 Nowhere Lane  
Philadelphia, PA 12345  
[www.bobscompany.com](http://www.bobscompany.com)  
Phone: 555-555-1215  
Fax: 555-555-1212

**Other**

Key Technologies:

Misc. Notes:

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Voila! You have a new client!

If you want to add any relevant attachment documents such as a copy of your client agreement, benefits overview, etc. Click the **Add Attachment** button.

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[Logout](#)  
 CATS Administrator <admin> (testdomain.com) **Administrator**

[Dashboard](#)
[Activities](#)
[Job Orders](#)
[Candidates](#)
[Companies](#)
[Contacts](#)
[Lists](#)
[Calendar](#)
[Reports](#)
[Settings](#)


[Add Company](#)
[Search Companies](#)
[Go To My Company](#)


Recent: Bob's Company | Java programmer | Company ABC

Quick Search:  [Go](#)

### Companies: Company Details

**Company Details**

Name:	<b>Bob's Company</b> ▼	Billing Contact:	
Primary Phone:	555-555-1215	Web Site:	<a href="http://www.bobscompany.com/">http://www.bobscompany.com/</a>
Secondary Phone:		Key Technologies:	Java, python, windows
Fax Number:	555-555-1212	Created:	05-24-16 (06:37 AM) (CATS Administrator)
Address:	1234 Nowhere Lane  Philadelphia, PA 12345	Owner:	CATS Administrator

Attachments: [Add Attachment](#) 

Misc. Notes: Makes doors and windows for Bob and his friends

[Edit](#)
[Delete](#)
[View History](#)

### Job Orders

ID	Title	Type	Status	Created	Modified	Start	Age	S	P	Recruiter	Owner	Action
<a href="#">Add Job Order</a>												

### Contacts

First Name	Last Name	Title	Department	Work Phone	Cell Phone	Created	Owner	Action
<a href="#">Add Contact</a>								

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## 10.3 Add a new Contact

Next let's add a Company Contact.

Click [Add Contact](#) at the bottom of the current screen.

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[Logout](#)  
 CATS Administrator <admin> (testdomain.com) **Administrator**

[Dashboard](#)
[Activities](#)
[Job Orders](#)
[Candidates](#)
[Companies](#)
[Contacts](#)
[Lists](#)
[Calendar](#)
[Reports](#)
[Settings](#)


[Add Company](#)
[Search Companies](#)
[Go To My Company](#)

Recent: Bob's Company | Java programmer | Company ABC

Quick Search:

### Companies: Company Details

#### Company Details

Name:	<b>Bob's Company</b> ▼	Billing Contact:	
Primary Phone:	555-555-1215	Web Site:	<a href="http://www.bobscompany.com/">http://www.bobscompany.com/</a>
Secondary Phone:		Key Technologies:	Java, python, windows
Fax Number:	555-555-1212	Created:	05-24-16 (06:37 AM) (CATS Administrator)
Address:	1234 Nowhere Lane  Philadelphia, PA 12345	Owner:	CATS Administrator

Attachments: [Add Attachment](#)  
 Misc. Notes: Makes doors and windows for Bob and his friends

[Edit](#)
[Delete](#)
[View History](#)

#### Job Orders

ID	Title	Type	Status	Created	Modified	Start	Age	S	P	Recruiter	Owner	Action
<a href="#">Add Job Order</a>												

#### Contacts

First Name	Last Name	Title	Department	Work Phone	Cell Phone	Created	Owner	Action
<a href="#">Add Contact</a>								

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Fill in all the information fields, including any relevant notes that's you want to remember for later. Then click Add Contact

You should now see the contact listed in the Contacts section of the Company screen.

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CATS Administrator <admin> (testdomain.com) Administrator

Logout


Dashboard Activities Job Orders Candidates Companies Contacts Lists Calendar Reports Settings

Add Company Search Companies Go To My Company

Recent: Bob's Company | Java programmer | Company ABC Quick Search:  Go




### Companies: Company Details

#### Company Details


Name:	Bob's Company ▼	Billing Contact:	
Primary Phone:	555-555-1215	Web Site:	<a href="http://www.bobscompany.com/">http://www.bobscompany.com/</a>
Secondary Phone:		Key Technologies:	Java, python, windows
Fax Number:	555-555-1212	Created:	05-24-16 (06:37 AM) (CATS Administrator)
Address:	1234 Nowhere Lane  Philadelphia, PA 12345	Owner:	CATS Administrator

Attachments: [Add Attachment](#)



Misc. Notes: Makes doors and windows for Bob and his friends


 Edit  Delete  View History

#### Job Orders

ID	Title	Type	Status	Created	Modified	Start	Age	S	P	Recruiter	Owner	Action
 Add Job Order												

#### Contacts

First Name	Last Name	Title	Department	Work Phone	Cell Phone	Created	Owner	Action
Bob	Browning	CEO		555-555-1212 x 1	555-555-1214	05-24-16	CATS A.	 

 Add Contact

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Server Response Time: 0.04 seconds.  
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## 10.4 Add a new Job Order

From the current screen, let's add our first Job order. Click Add Job Order in the Job Orders section of Bob's Company page.

**Note:** OpenCATS is set up to run Direct-hire (Perm) or Contract (project) jobs. We will note the differences below.

Let's look at the fields in the **Add Job Order** screen:

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CATS Administrator <admin> (testdomain.com) Administrator [Logout](#)

Dashboard Activities **Job Orders** Candidates Companies Contacts Lists Calendar Reports Settings

[Add Job Order](#) [Search Job Orders](#)

Recent: Bob's Company | Java programmer | Company ABC Quick Search:

### Job Orders: Add Job Order

Add a new job order to the system.

Title:	<input type="text"/>	Start Date:	<input type="text" value="None"/>
Company:	<input type="text" value="Bob's Company"/>	Duration:	<input type="text"/>
Department:	<input type="text"/>	Maximum Rate:	<input type="text"/>
Contact:	<input type="text" value="None"/>	Type:	<input type="text" value="H (Hire)"/>
City:	<input type="text" value="Philadelphia"/>	Salary:	<input type="text"/>
State:	<input type="text" value="PA"/>	Openings:	<input type="text" value="1"/>
Recruiter:	<input type="text" value="Administrator, CATS"/>	Company Job ID:	<input type="text"/>
Owner:	<input type="text" value="Administrator, CATS"/>	Hot:	<input type="checkbox"/>
		Public:	<input type="checkbox"/>

Description:

Internal Notes:

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The fields on the upper left column are self-explanatory.

- **Start Date** is when the hired candidate should start.
- **Duration** The length of contract (Project) for a temporary role. If this is a permanent role, you can put “direct hire”, whatever you want, or just leave it blank.
- **Maximum rate** Self-explanatory
- **Type** This drop-down field lets you select the type of role. Options are: Hire, Contract to hire, Contract, or freelance
- **Salary** Put the salary range here
- **Openings** Number of openings
- **Company Job ID** This is for the unique Job ID assigned to this role.
- **Hot** If this is a hot job, check this box.

- **Public** If you have the OpenCATS job board set up (we will do this later), checking this box will make this job order visible on it. Candidates will be able to view and apply.
- **Description** Enter your job description here
- **Internal Notes** Any notes or information entered here will be visible within your company, but not visible on your public job board.

**Note:** If you have the public job board set up (we will go through this later), all the information on this screen **except** the **Internal Notes** section will be viewable to anyone looking at your jobs. Including the listed salary information. If you do not want that visible, put it in the **Internal Notes** section.

The screenshot shows the 'Add Job Order' form in the OpenCATS application. The form is titled 'Job Orders: Add Job Order' and includes a sub-header 'Add a new job order to the system.' The form is divided into two main sections: a top section for job details and a bottom section for description and notes. The top section contains fields for Title, Company (pre-filled with 'Bob's Company'), Department, Contact, City (pre-filled with 'Philadelphia'), State (pre-filled with 'PA'), Recruiter (pre-filled with 'Administrator, CATS'), Owner (pre-filled with 'Administrator, CATS'), Start Date (pre-filled with 'None'), Duration, Maximum Rate, Type (pre-filled with 'H (Hire)'), Salary, Openings (pre-filled with '1'), Company Job ID, Hot (checkbox), and Public (checkbox). The bottom section contains a 'Description' field with a rich text editor and an 'Internal Notes' field with a rich text editor. The Internal Notes field contains the text 'Everything BUT this box will be visible on your public job board (If you decide to activate it)'. The form has buttons for 'Add Job Order', 'Reset', and 'Back to Job Orders' at the bottom.

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Click Add Job Order

This will take you to your new Job Order screen.

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Logout  
CATS Administrator <admin> (testdomain.com) Administrator

Dashboard Activities **Job Orders** Candidates Companies Contacts Lists Calendar Reports Settings

Add Job Order Search Job Orders

Recent: IT Administrator | Bob's Company | Java programmer | Company ABC Quick Search:  Go

### Job Orders: Job Order Details

#### Job Order Details

Title:	IT Administrator	Duration:	Direct Hire
Company Name:	Bob's Company	Openings:	1
Department:		Type:	Hire
CATS Job ID:	2	Status:	Active
Company Job ID:	IT-1	Pipeline:	0
Contact Name:	Bob Browning	Submitted:	0
Contact Phone:	555-555-1212 x 1	Days Old:	0
Contact Email:	bob@bobscompany.com	Created:	05-24-16 (08:20 AM) (CATS Administrator)
Location:	Philadelphia, PA	Recruiter:	CATS Administrator
Max Rate:	80000	Owner:	CATS Administrator
Salary:	up to 80000		
Start Date:			

Attachments: [Add Attachment](#)

Description:

**IT Administrator**  
May 10, 2016 - June 10, 2016

Location: Ponte Vedra Beach, FL

Salary Range: \$53,000

Exempt/Non-Exempt: Exempt

Internal Notes:

Everything BUT this box will be visible on your public job board (If you decide to activate it)

#### Job Order Pipeline

Total Pipeline	Contacted	Cand Replied	Submitted	Interviewing	Offered	Declined	Placed

[Edit](#) [Delete](#) [Administrative Hide](#) [Generate Report](#) [View History](#)

#### Candidate Pipeline

Match	First Name	Last Name	Loc	Added	Entered By	Status	Last Activity	Action
-------	------------	-----------	-----	-------	------------	--------	---------------	--------

☐ Export [Add Candidate to This Job Order Pipeline](#)

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If everything looks correct, let's move on to adding our first candidate in OpenCATS and into the pipeline for this job.

## 10.5 Adding a Candidate and attaching them to the Job Order pipeline

Click Add Candidate to This Job Order Pipeline at the bottom of the screen.

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CATS Administrator <admin> (testdomain.com) Administrator [Logout](#)

Dashboard Activities **Job Orders** Candidates Companies Contacts Lists Calendar Reports Settings

[Add Job Order](#) [Search Job Orders](#)

Recent: IT Administrator | Bob's Company | Java programmer | Company ABC Quick Search:

### Job Orders: Job Order Details

#### Job Order Details

Title:	IT Administrator	Duration:	Direct Hire
Company Name:	Bob's Company	Openings:	1
Department:		Type:	Hire
CATS Job ID:	2	Status:	Active
Company Job ID:	IT-1	Pipeline:	0
Contact Name:	Bob Browning	Submitted:	0
Contact Phone:	555-555-1212 x 1	Days Old:	0
Contact Email:	bob@bobscompany.com	Created:	05-24-16 (08:20 AM) (CATS Administrator)
Location:	Philadelphia, PA	Recruiter:	CATS Administrator
Max Rate:	80000	Owner:	CATS Administrator
Salary:	up to 80000		
Start Date:			

Attachments: [Add Attachment](#)

Description:

**IT Administrator**  
May 10, 2016 - June 10, 2016

Location: Ponte Vedra Beach, FL

Salary Range: \$53,000

Exempt/Non-Exempt: Exempt

Internal Notes:

Everything BUT this box will be visible on your public job board (If you decide to activate it)

#### Job Order Pipeline

Total Pipeline	Cand Replied	Submitted	Interviewing	Offered	Declined	Placed
Contacted	Qualifying					

[Edit](#) [Delete](#) [Administrative Hide](#) [Generate Report](#) [View History](#)

#### Candidate Pipeline

Match	First Name	Last Name	Loc	Added	Entered By	Status	Last Activity	Action
<input type="checkbox"/>	<a href="#">Export</a> <a href="#">Add Candidate to This Job Order Pipeline</a>							

CATS Version 0.9.2 Diablo. Powered by CATS.

Server Response Time: 0.05 seconds.  
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Then Add Candidate.

The screenshot shows the OpenCATS web interface. The top navigation bar includes links for Dashboard, Activities, Job Orders, Candidates, Companies, Contacts, Lists, Calendar, Reports, and Settings. The user is logged in as 'CATS Administrator <admin> (testdomain.com) Administrator'. The main content area displays 'Job Order Details' for a job titled 'IT Administrator' at 'Bob's Company'. The job details include fields for Title, Company Name, Department, CATS Job ID, Company Job ID, Contact Name, Contact Phone, Contact Email, Location, Max Rate, Salary, and Start Date. A modal window titled 'Add Candidate to This Job Order Pipeline' is open on the right, showing a search bar and a list of candidates. A red arrow points to the 'Add Candidate' button in the modal. The bottom of the page shows the 'Candidate Pipeline' table with columns for Match, First Name, Last Name, Loc, Added, Entered By, Status, Last Activity, and Action. The footer indicates 'CATS Version 0.9.2 Diablo. Powered by CATS. Server Response Time: 0.05 seconds. © 2005 - 2007 Cognizo Technologies, Inc.'

Click Browse to upload a resume from your local file system.

From this screen you need to manually copy and paste into the information fields on the left. When you have filled out all of the necessary information, click Add Candidate in the bottom left corner.

open. online. free.

CATS Administrator <admin> (testdomain.com) Administrator

Dashboard Activities **Job Orders** Candidates Companies Contacts Lists Calendar Reports Settings

[Add Job Order](#) [Search Job Orders](#)

Recent: IT Administrator | John Doe | Java programmer | Bob's Company | Company ABC Quick Search:  Go

### Job Orders: Job Order Details

#### Job Order Details

Title:	IT Administrator	Duration:	Direct Hire
Company Name:	Bob's Company	Openings:	1
Department:		Type:	Hire
CATS Job ID:	2	Status:	Active
Company Job ID:	IT-1	Pipeline:	1
Contact Name:	Bob Browning	Submitted:	0
Contact Phone:	555-555-1212 x 1	Days Old:	0
Contact Email:	bob@bobscompany.com	Created:	05-24-16 (08:20 AM) (CATS Administrator)
Location:	Philadelphia, PA	Recruiter:	CATS Administrator
Max Rate:	80000	Owner:	CATS Administrator
Salary:	up to 80000		
Start Date:			

Attachments: [Add Attachment](#)

Description:

**IT Administrator**

May 10, 2016 - June 10, 2016

Location: Ponte Vedra Beach, FL

Salary Range: \$53,000

Exempt/Non-Exempt: Exempt

Internal Notes:

Everything BUT this box will be visible on your public job board (if you decide to activate it)

**Job Order Pipeline**

100%

Total Pipeline Contacted Cand Replied Qualifying Submitted Interviewing Offered Declined Placed

[Edit](#) [Delete](#) [Administrative Hide](#) [Generate Report](#) [View History](#)

#### Candidate Pipeline

	Match	First Name	Last Name	Loc	Added	Entered By	Status	Last Activity	Action
<input type="checkbox"/>		John	Doe	NY	05-24-16	Administrator, C.	No Contact	05-24-16 (CATS Administrator): Added candidate to pipeline.	<a href="#">Add</a> <a href="#">Remove</a>

☐ Export [Add Candidate to This Job Order Pipeline](#)

Success! We have a candidate in the pipeline!

**Note:** Make sure to Rate your candidates with the stars under **Match** on the bottom this screen. It will help with quick reference later on.

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## Indices and tables

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- `genindex`
- `modindex`
- `search`