
OpenCATS Documentation

Release 0.9.3

OpenCATS

January 12, 2017

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WARNING-READ FIRST

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

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Preface

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 0.9.3.3-3 “Inferno”.

3.3 Legal information/License FAQ

What license is OpenCATS distributed under?

This application is available under two licenses.

- OpenCATS code is under Mozilla Public License 2.0
- Code from the original ‘CATS Project’ circa 2007 is under CATS Public License Version 1.1a (a modified 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. The other things (cosmetic and linking) are specified in Section 2 and 3 above.

Introduction

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

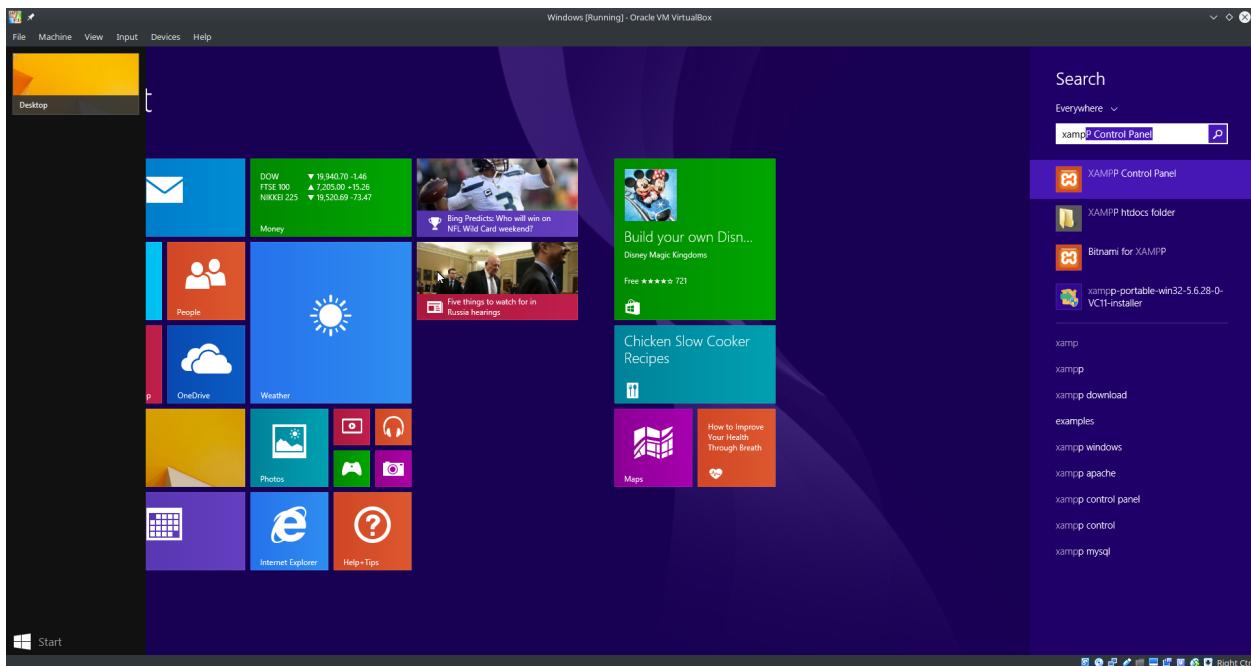
5.1 Windows Prerequisites

Installation instructions are given for the XAMPP default install environment only. WAMPP will also work if you prefer it. The steps will be a little different.

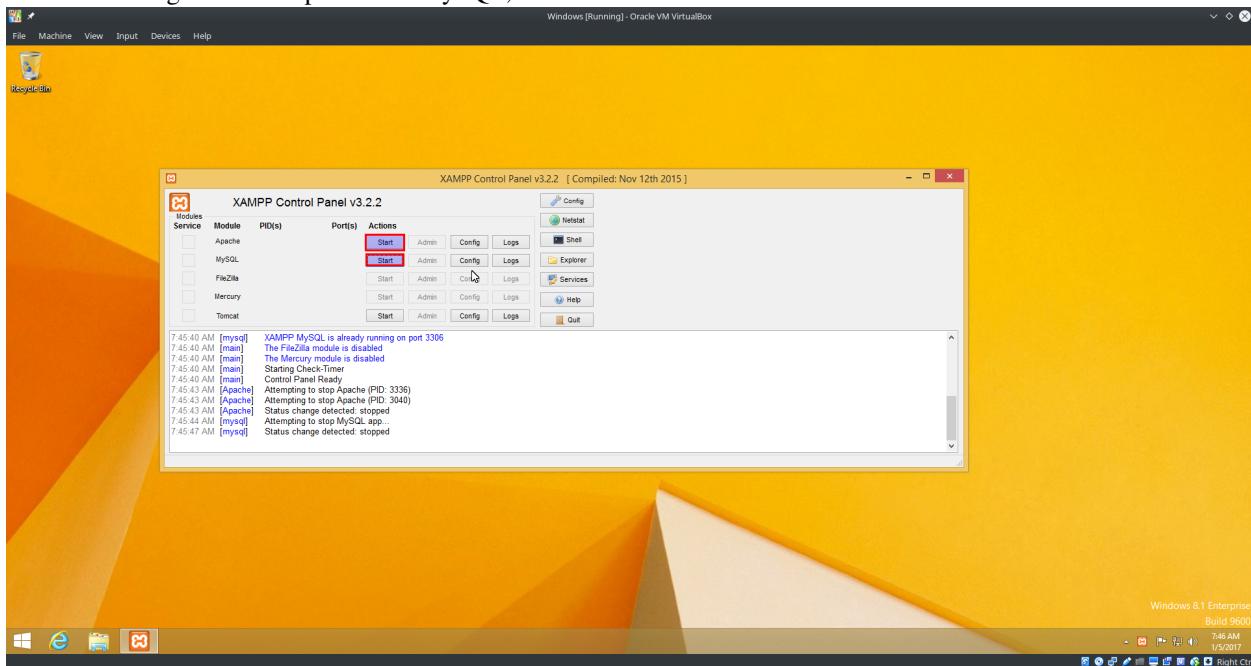
- Download - [XAMPP](#)
- Install XAMPP
- Download - [Composer](#)
- Install Composer
- Download - [OpenCATS_0.9.3-3](#) . You can not install this yet.
- Go to the folder where the OpenCATS-0.9.3-3.zip file is located (usually the Downloads folder)
- RIGHT-CLICK on the OpenCATS-0.9.3-3.zip file
- Click Extract All
- Change the folder that the files will be extracted to, to the following:
- C:\xampp\htdocs\
- Click extract

5.2 Start Xampp

- Click the Windows start button and type xampp
- Hit enter. This will open the XAMPP control panel.

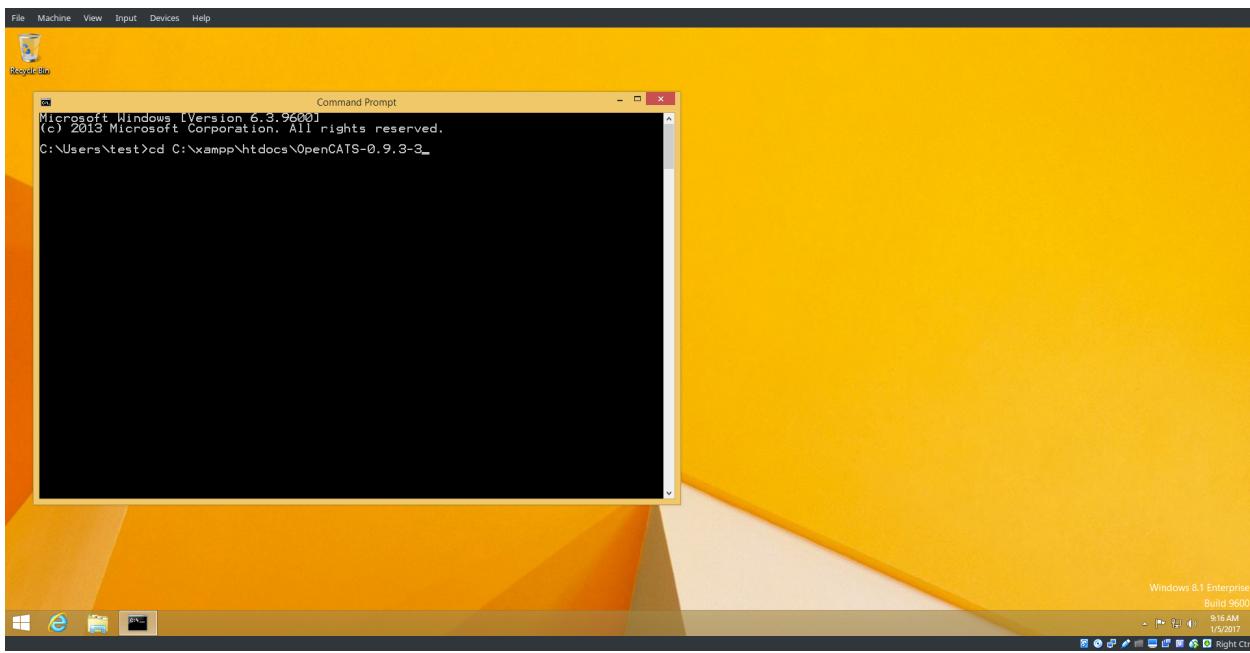


- On the right side of Apache and MySQL, click start for each one.

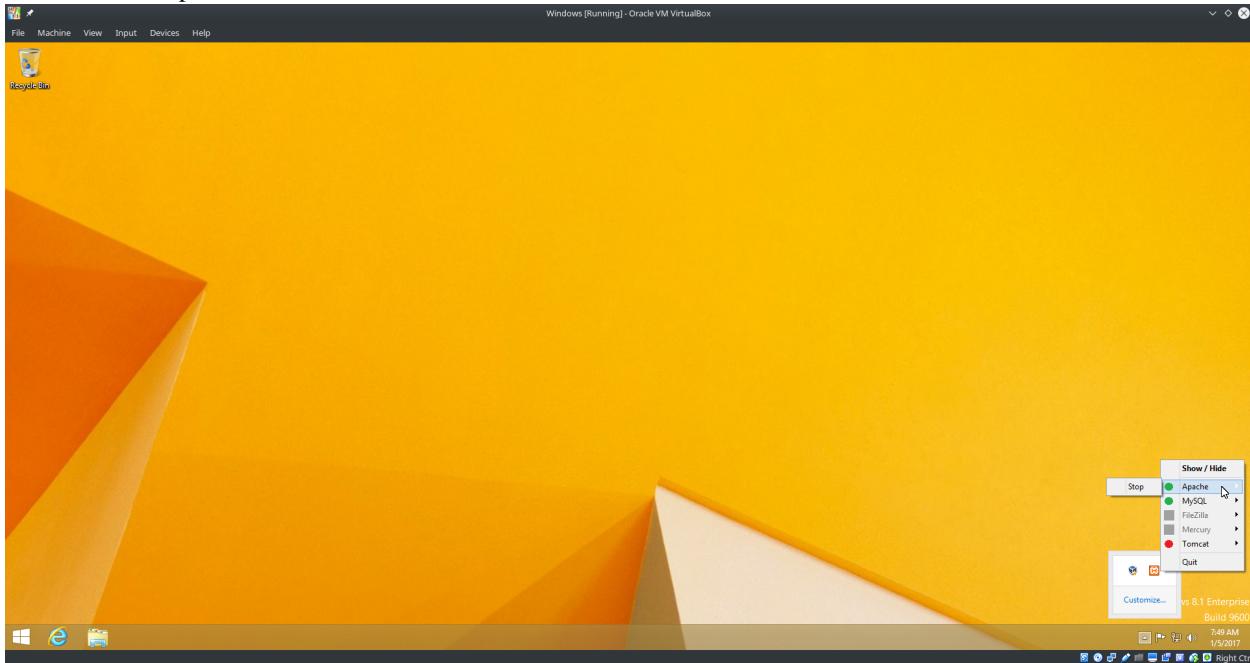


5.3 Composer-Install dependencies

- Click the Windows start button and type cmd.exe, then hit enter
- This should open a windows command prompt.
- Type the following: cd C:\xampp\htdocs\OpenCATS-0.9.3-3



- Hit enter
- Type `composer install`
- After Composer is done installing the dependencies, close the command prompt window.
- Stop the apache service (lower right corner, right click XAMPP, stop apache)
- Start the apache service



5.4 Optional - Renaming your OpenCATS Applicant Tracking System directory.

The current default directory name for the OpenCATS files is OpenCATS-0.9.3-3. This will result in the web address in your browser being <http://localhost/OpenCATS-0.9.3-3>.

If you want to rename the main OpenCATS directory to something else, you can.

- Simply navigate to C:xampphtdocs
- Right click on OpenCATS-0.9.3-3
- Click rename
- Rename the directory whatever you want (example: ATS)

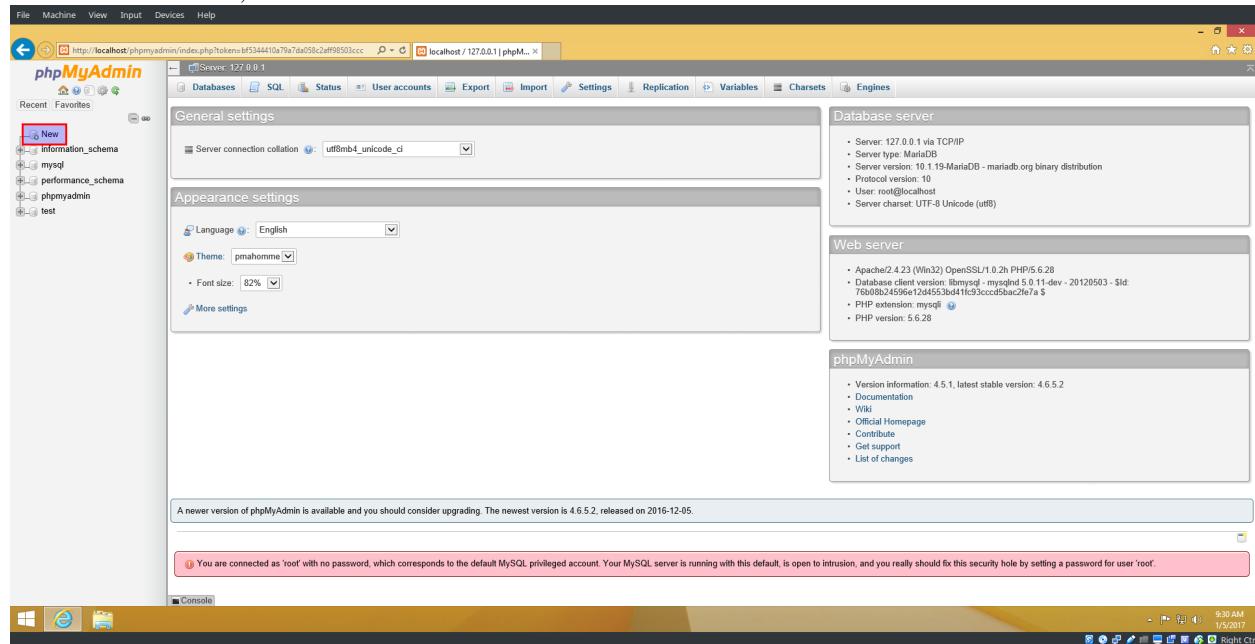
Now, to access it, your browser address will be <http://localhost/ATS>

5.5 Launch phpMyAdmin

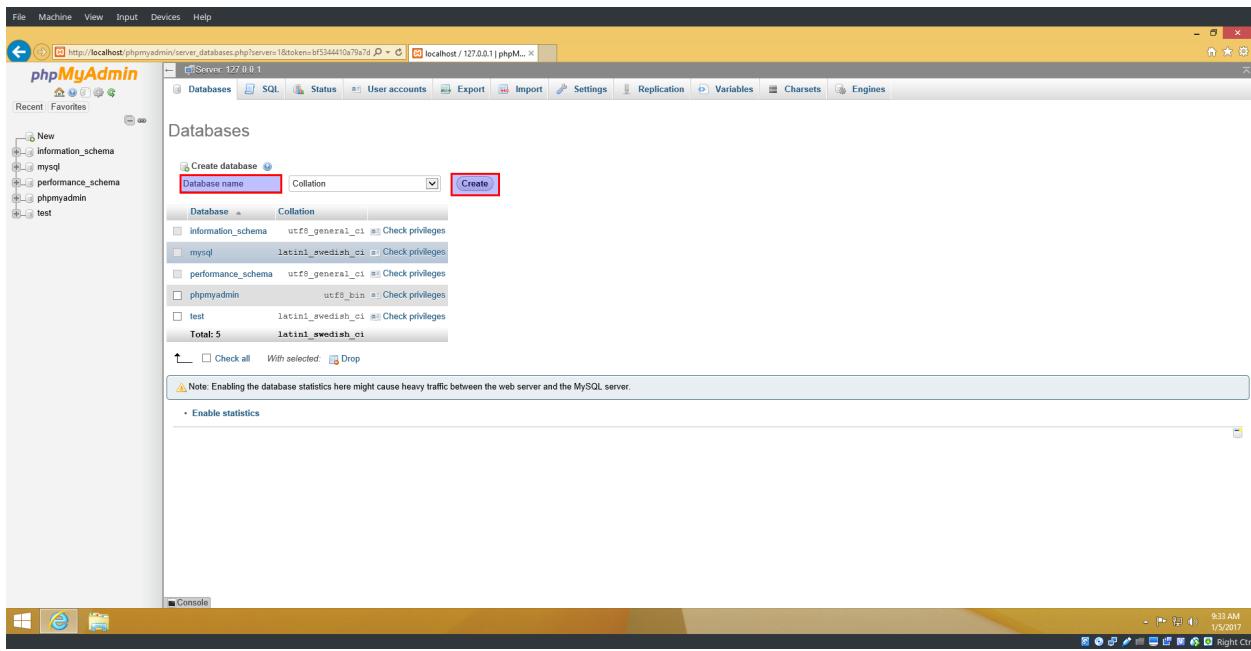
- In your browser, go to: <http://localhost/phpmyadmin/>

Note: If phpmyadmin does not load in this screen, stop and start your apache service again per the instructions above.

- On the left side, click new to create a new database

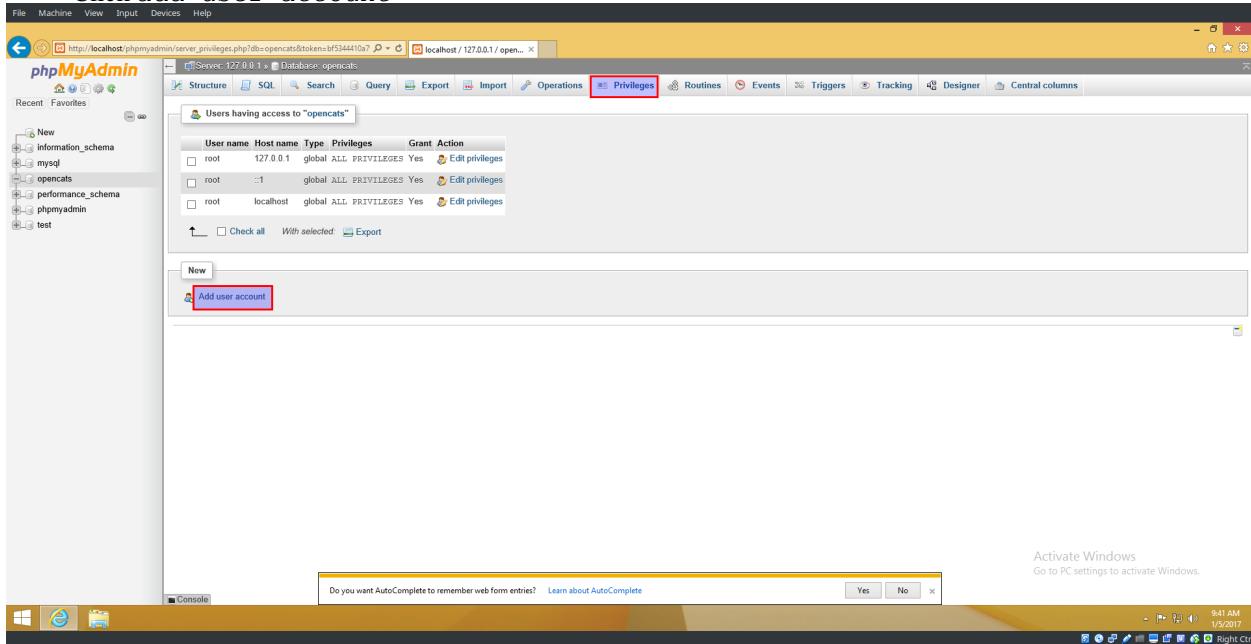


- In the box labeled database name type opencats.
- Hit create



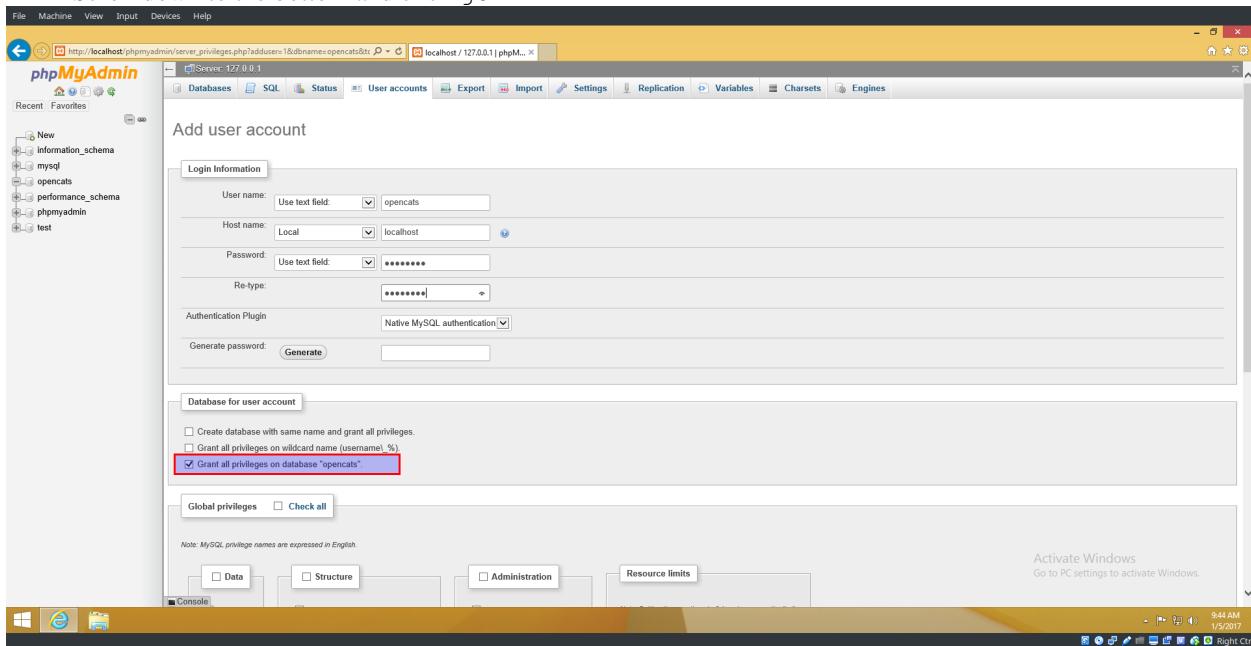
You should now see “opencats” listed among the databases on the left.

- Click the opencats database
- In the top row of tabs, on the right side of the screen, click privileges
- Click add user account



- User name, make sure use text field is selected, in the empty box next to it type opencats
- Host name: In the first box, select local from the drop-down options. The second box should say localhost
- Type opencats for the database password twice
- In the “database for user account section”, confirm that the third checkbox Grant all privileges on database "opencats" is checked.

- Scroll down to the bottom and click go



5.6 Set up OpenCATS

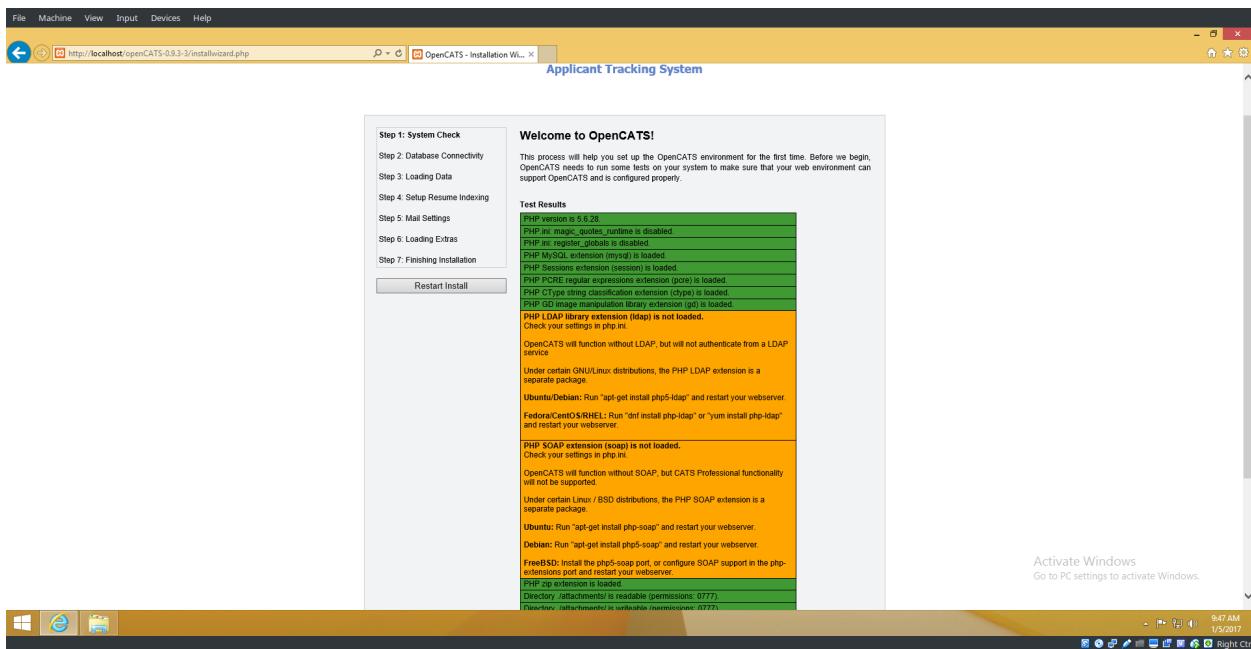
In your Web Browser, visit <http://localhost/OpenCATS-0.9.3-3> (adjust if you renamed the OpenCATS-0.9.3-3 directory). If OpenCATS has been configured correctly, you should see a page that looks like this:



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

Note: Disregard the yellow errors. They are not necessary for this installation and you will not lose any OpenCATS functionality.

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



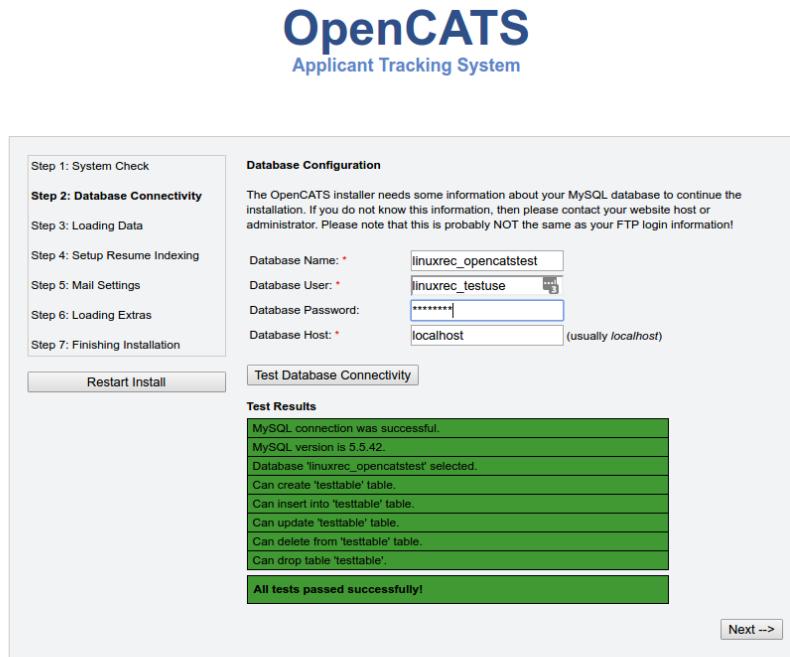
Warning: Red = Bad You can't continue the installation until a server environment issue is fixed.

Step 2 Database connectivity

Enter the following information: Database Name: opencats Database User: opencats Database Password: opencats Database Host: localhost

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.



Step 3 Loading Data

For a new installation, select New Installation, then next

Note: Demonstration Installation will auto-populate 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

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

Loading Data - Empty Database

The installer is ready to set up your OpenCATS data. Please pick the way you want the installer to set up OpenCATS:

- New Installation (Recommended)
- Demonstration Installation
- Restore Installation from Backup

You can always run the installer again to clear the database and choose a different option.

Next -->

Restart Install

Step 4 Setup resume indexing

Unfortunately, for now, there is no resume indexing. * Click Skip this Step.

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

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

Mail Settings

Please enter your e-mail address (for where OpenCATS e-mails should be replied to, etc.).

E-mail: *

OpenCATS sends automatic E-Mails on different events. Please choose the mechanism for E-Mail delivery via OpenCATS.

Mail Support: *	<input type="text" value="SMTP w/Authorization"/>
SMTP Host: *	<input type="text" value="localhost"/>
SMTP Port: *	<input type="text" value="587"/>
SMTP Username: *	<input type="text" value="user"/>
SMTP Password: *	<input type="text" value="password"/>

Next -->

Restart Install

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



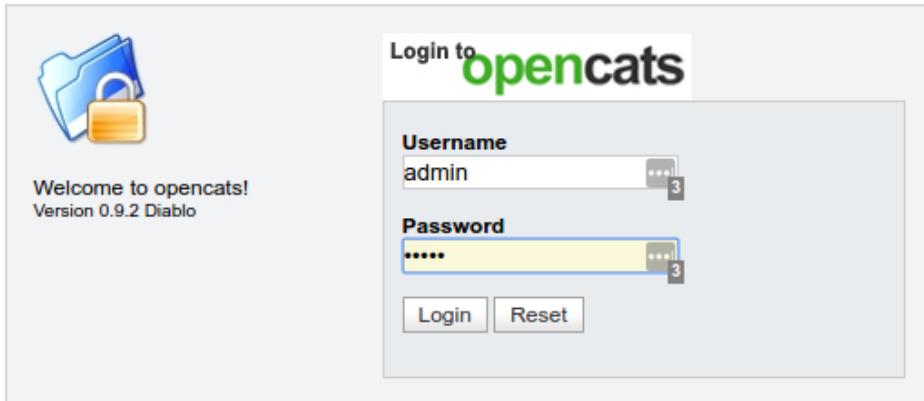
The screenshot shows the "Step 6: Loading Extras" configuration screen. On the left, a sidebar lists steps from "Step 1: System Check" to "Step 7: Finishing Installation". The main area is titled "Loading Extras - Localization" and contains two dropdown menus: one for time zone ("GMT-06:00 Central Time (US and Canada)") and one for date format ("MM-DD-YYYY (US)"). Below this is the "Loading Extras - Choose Extras" section, which lists "United States Zip Code Lookup" with an "Install" radio button selected. At the bottom right is a "Next -->" button.

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.



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.

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

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 Hiring Overview

Name Company Recruiter Date

0 1
04/25 - 05/01 05/02 - 05/08 05/09 - 05/15 05/16 - 05/22

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

NO DATA

CATS Version 0.9.2 Diablo. Powered by [CATS](#).

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

Install on Shared-hosting (Bluehost, GoDaddy or similar)

You can install OpenCATS right to your shared hosting account! This way OpenCATS will be web accessible from any computer and multiple users, without the hassle of setting up and running a server.

These instructions will walk you through setting up OpenCATS on a Bluehost hosting account. Major web-hosts should be a similar process, though you may have to search and make small tweaks.

Note: There are benefits and down-sides to running your OpenCATS system through a shared hosting account. The main benefit is that OpenCATS will be web accessible to any user from any location, and not limited to your local machine. You will however lose the resume-indexing tools with a shared-hosting environment. Which means that resumes will NOT be keyword searchable.

6.1 Download OpenCATS to your computer

Click this link to download the OpenCATS files, we will need them later:

[OpenCATS Files](#)

6.2 CPanel-File Manager

Note: All images use Bluehost for an example. If you have a different hosting provider, this will likely look a little different.

Log in to your shared hosting account and click CPanel

The screenshot shows the OpenCATS cPanel interface. At the top, there's a navigation bar with links for hosting, WordPress tools, domains, addons, account, cart, help, and logout. The 'cpanel' link is highlighted with a red box. Below the navigation is a search bar and a 'set as default page' checkbox.

hosting services:

services	level	username	expires	actions
Shared	Plus	[REDACTED]	08/25/17	CURRENT Upgrade

[add new hosting service](#)

system:

- File Manager
- MySQL Wizard
- MySQL Databases
- MySQL Databases

website:

- Website Manager
- Install WordPress
- Weebly
- One-Click Installs
- My Installs
- Themes & Templates
- Page Speed Grader
- AppMachine
- goMobi Mobile
- Logos & Graphics
- Plugins & Extensions

email:

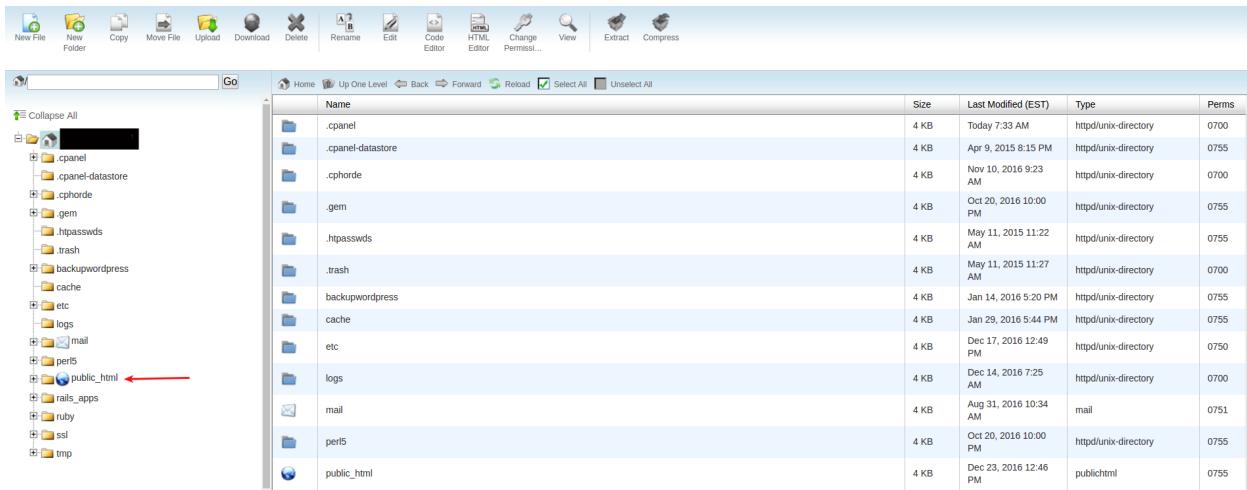
- Email Manager
- Check Webmail
- G Suite
- Spam Assassin
- SpamExperts
- Spam Hammer
- Forwarders

Scroll down to the “files” section and click “File Manager”.

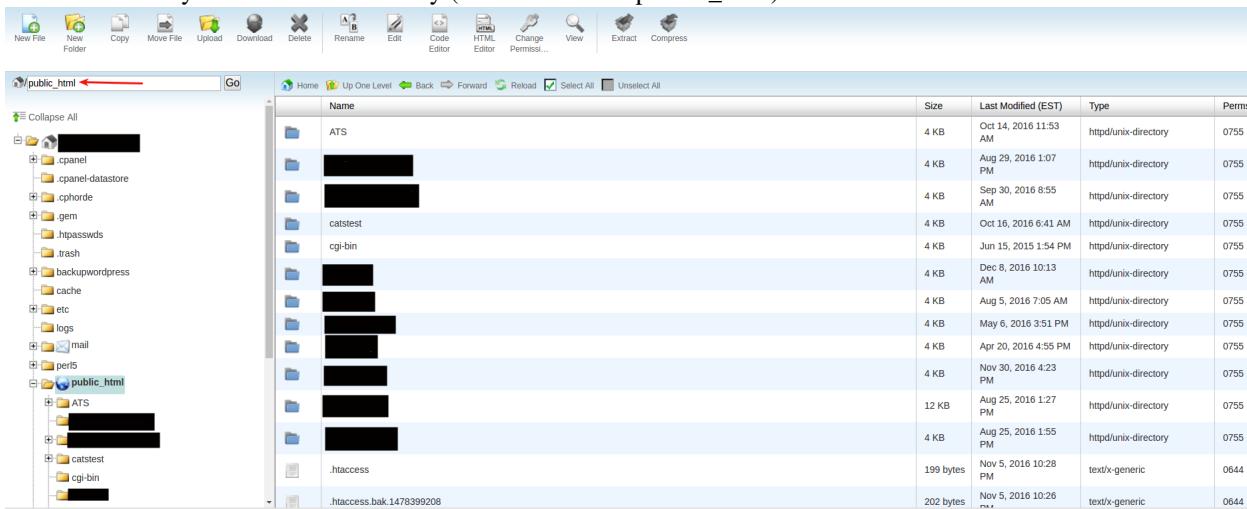
files:

- Site Backup Pro
- File Manager
- Legacy File Manager
- FTP Manager
- File Count
- Disk Space Usage
- Web Disk

It will open up a new tab in your browser.

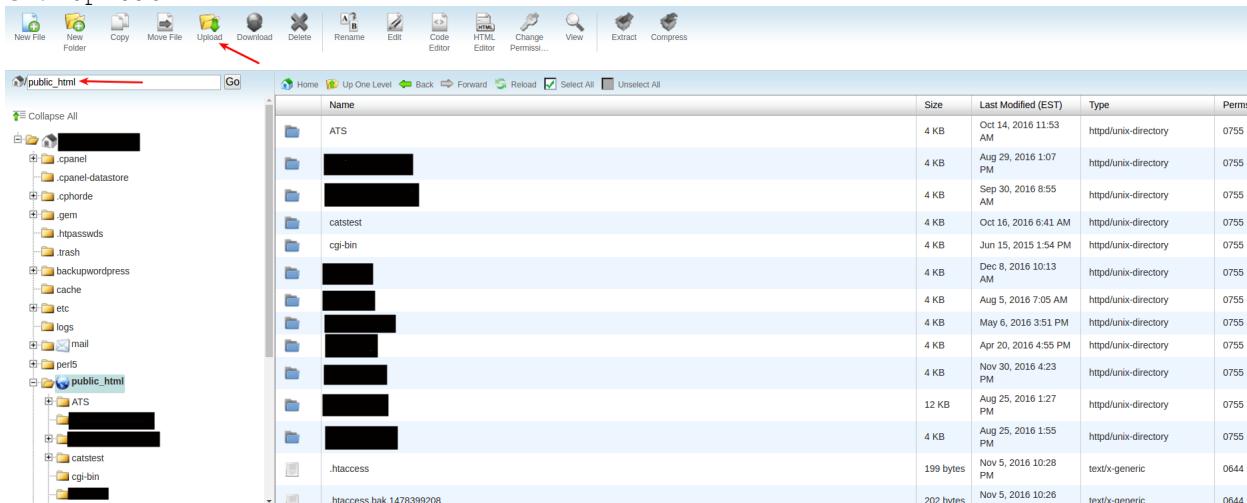


Double click on your main web directory (mine is listed as public _html)

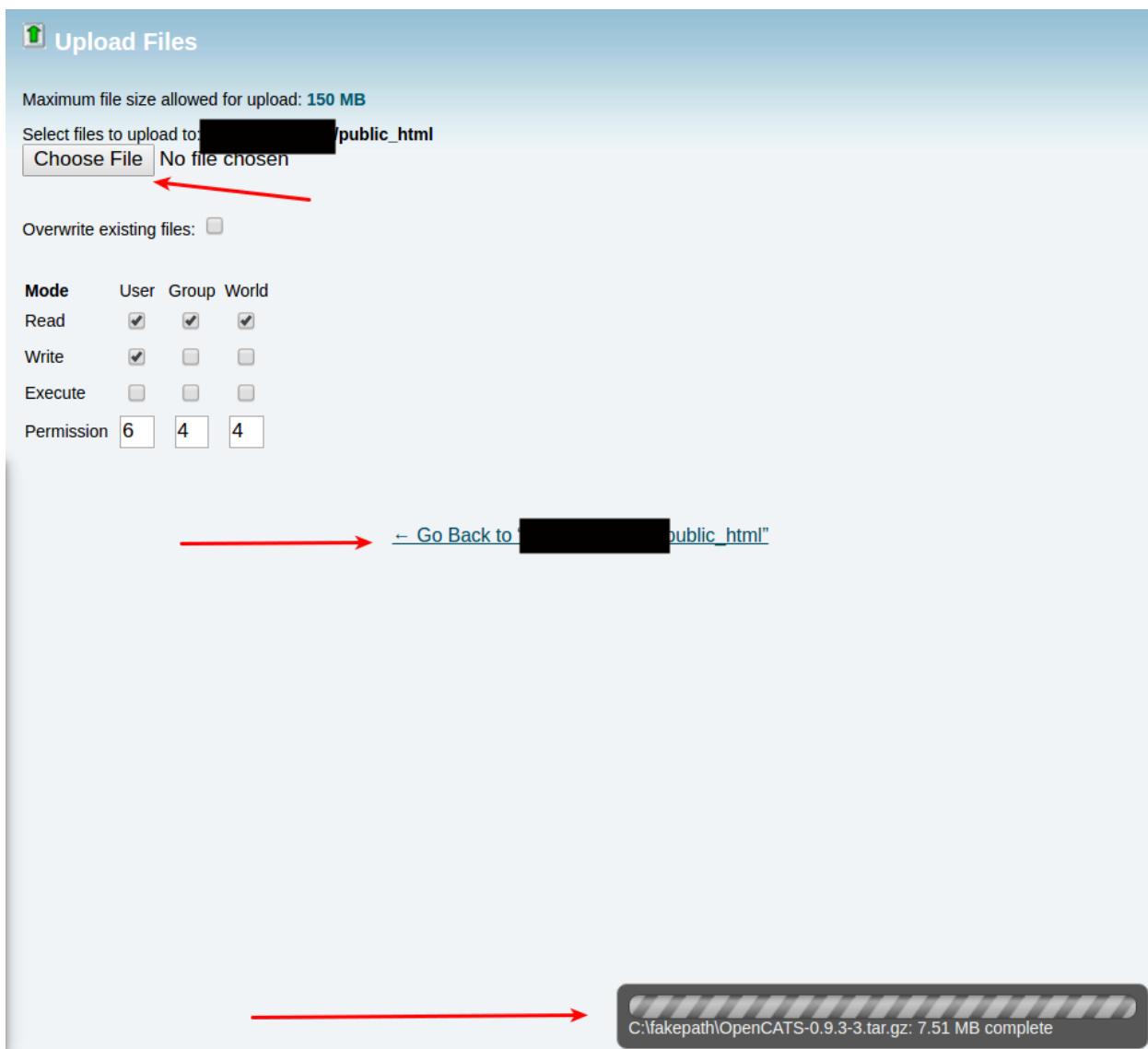


Now we need to upload the OpenCATS tar file that we downloaded into this directory

Click Upload



This should bring you to a file upload screen.



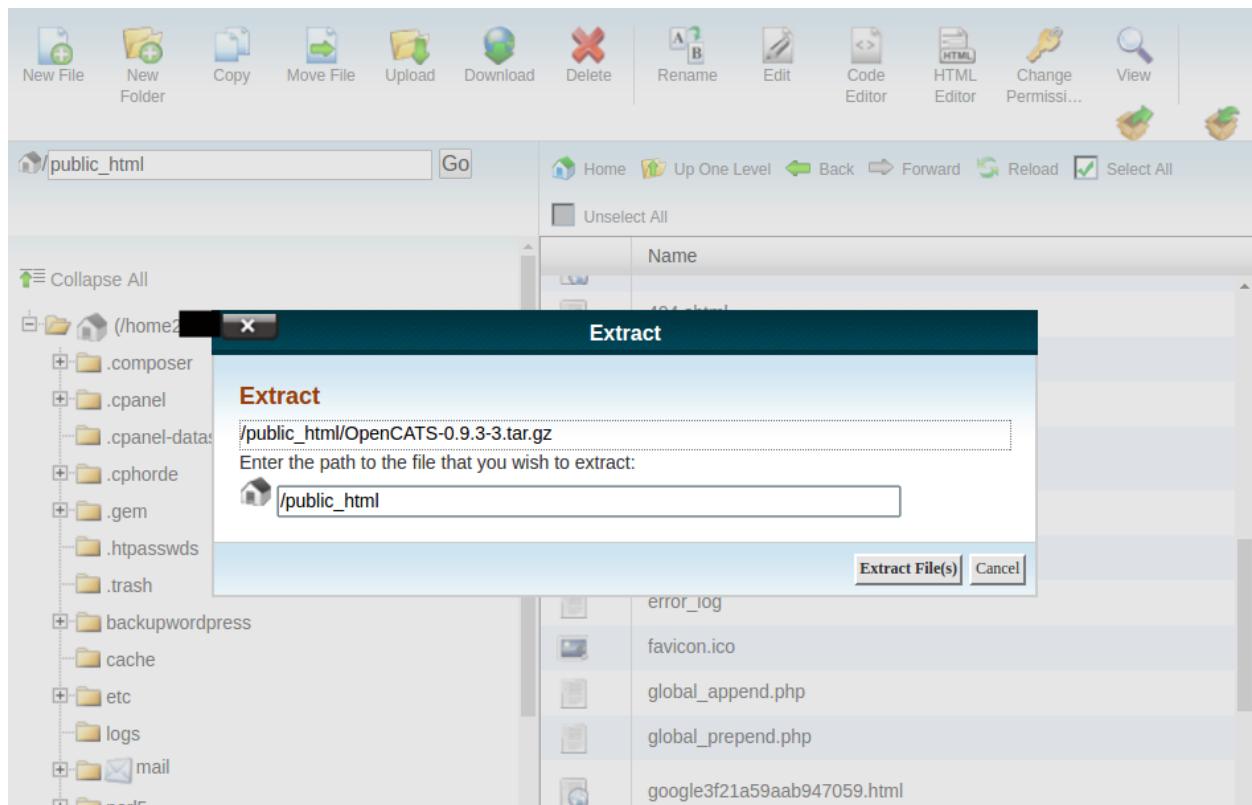
- Click Choose File
- Find the 0.9.3-3.tar.gz file that we downloaded and select it.

Note: Make sure you wait for the upload to complete before going back into the public_html folder

- When the upload is finished, click the Go Back to public_html
- Scroll down to the 0.9.3-3.tar.gz we just uploaded and click it once to highlight it.
- Click on Extract at the top to extract the OpenCATS files from the Tar file.

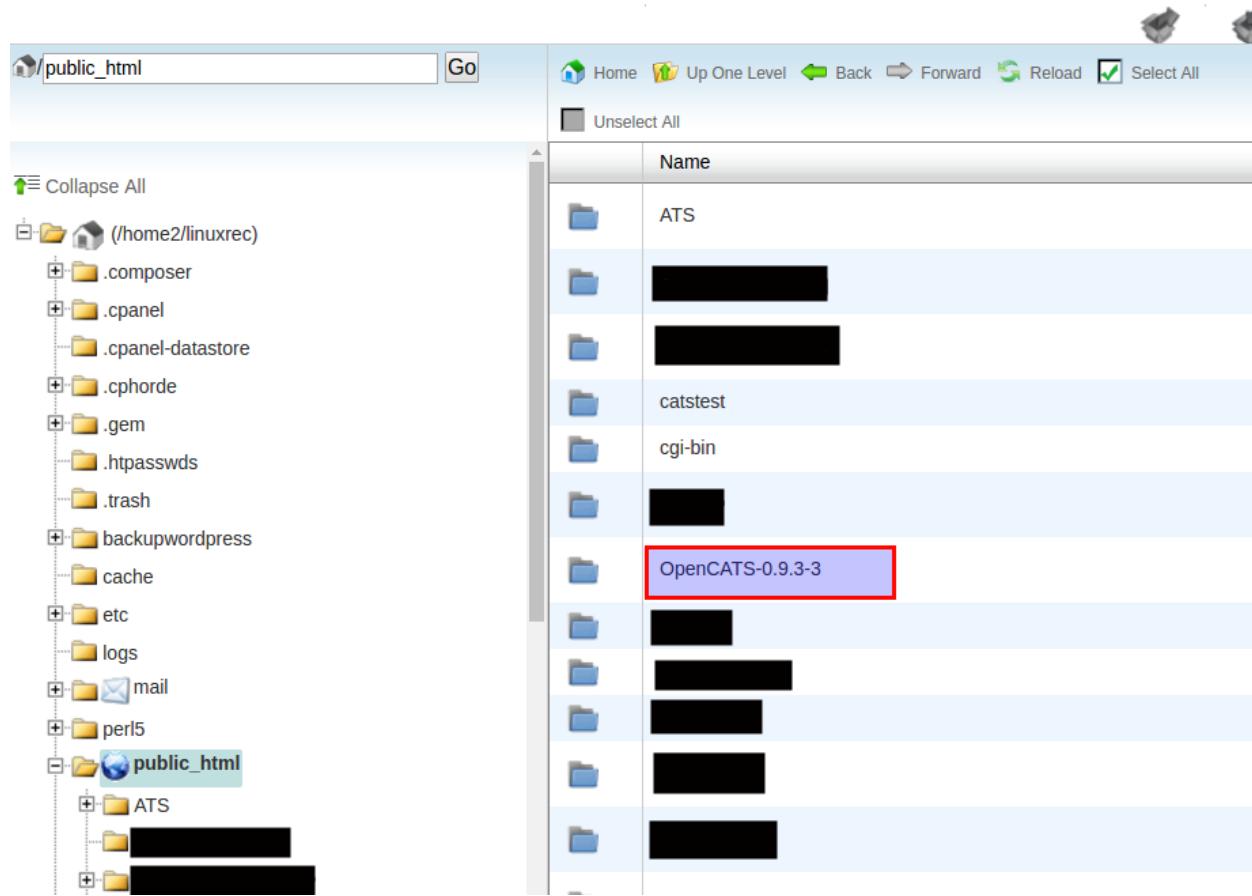


This should open a new screen:



The default address should be fine, click Extract File(s)

Now you should see the extracted folder OpenCATS-0.9.3-3 listed in your public_html directory.



Note: If you want to rename the folder, that's ok. The folder name will be part of the web address you use to access your OpenCATS Installation.

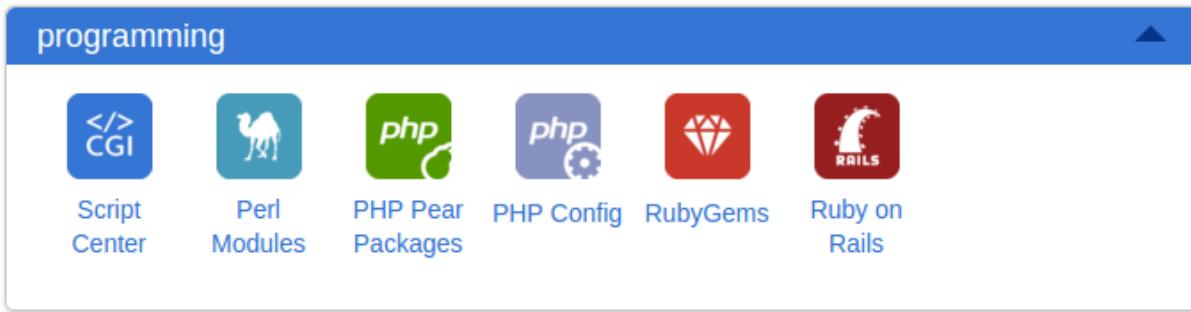
- Double click on the OpenCATS directory and check for any files named INSTALL_BLOCK. If there is one there, delete it. This file will prevent OpenCATS from installing on your system.

6.3 CPanel-PHP

- Return to the main CPanel screen.

Warning: Changing PHP versions on hosting accounts MAY affect web sites or programs that are already installed. You should back up any critical websites or programs BEFORE switching PHP versions.

- Scroll down to the Programming section and click on “PHP Config”.



This will open a screen to select what version of PHP your hosting is running. OpenCATS should have PHP 5.6. Select whatever PHP 5.6 option you prefer, I usually have the single ini option selected.

- PHP 5.4**

All files with the extension .php will be handled by the PHP 5.4 engine.
Legacy PHP with security updates. Compatible with most environments.

- PHP 5.4 (Single php.ini)**

Same as PHP 5.4, but all subdirectories will use ~/public_html/php.ini

- PHP 5.4 (FastCGI)**

All files with the extension .php will be handled by PHP 5.4 FastCGI processes.
FastCGI for PHP makes all your PHP applications run through mod_fastcgi instead of mod_suphp. This eliminates the overhead of loading the PHP interpreter on every hit. Since it is always in memory ready for the next hit, the responses will be generated faster.

- PHP 5.6**

All files with the extension .php will be handled by the PHP 5.6 engine.

- PHP 5.6 (Single php.ini)**

Same as PHP 5.6, but all subdirectories will use ~/public_html/php.ini

- PHP 5.6 (FastCGI)**

All files with the extension .php will be handled by PHP 5.6 FastCGI processes.
FastCGI for PHP makes all your PHP applications run through mod_fastcgi instead of mod_suphp. This eliminates the overhead of loading the PHP interpreter on every hit. Since it is always in memory ready for the next hit, the responses will be generated faster.

- PHP 7.0 [Beta, check site functionality for compatibility after enabling]**

All files with the extension .php will be handled by the PHP 7.0 engine.
Latest version of PHP.

- PHP 7.0 (Single php.ini) [Beta, check site functionality for compatibility after enabling]**

Same as PHP 7.0, but all subdirectories will use ~/public_html/php.ini

- PHP 7.0 (FastCGI) [Beta, check site functionality for compatibility after enabling]**

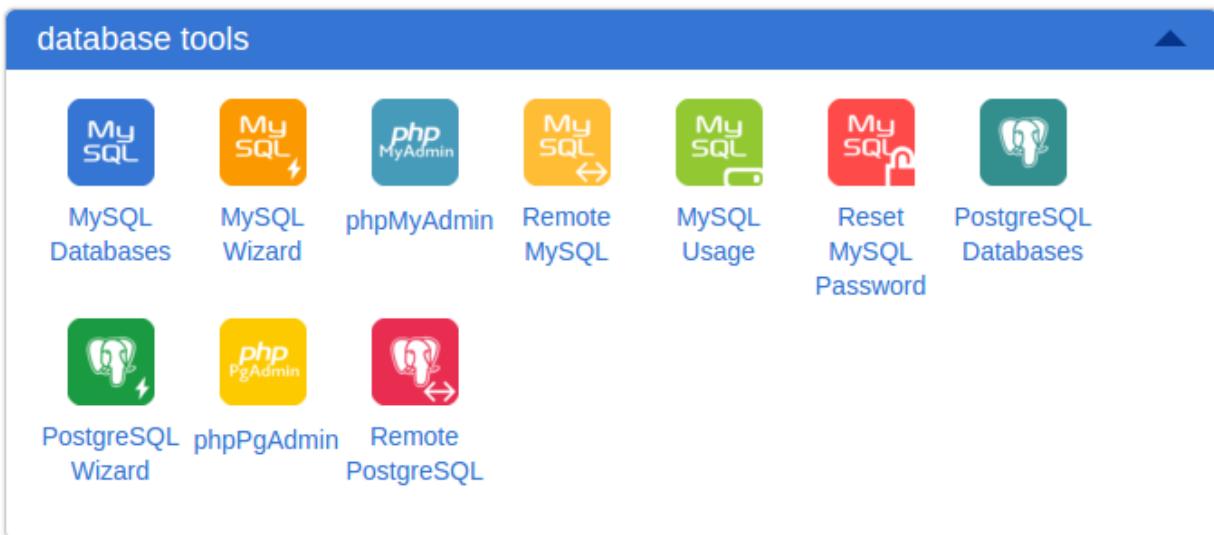
All files with the extension .php will be handled by PHP 7.0 FastCGI processes.
FastCGI for PHP makes all your PHP applications run through mod_fastcgi instead of mod_suphp. This eliminates the overhead of loading the PHP interpreter on every hit. Since it is always in memory ready for the next hit, the responses

- Scroll down and click save changes, then go back to the main CPanel dashboard.

6.4 CPanel-MySQL

Note: You will need the MySQL database name, user name and password later. Make sure you write it down as you create them.

- Scroll down to the Database Tools section and click MySQL Wizard.



- Type in a MySQL database name (whatever you want, for this I am doing “octest2”).
- Click next step.

MySQL® Database Wizard

MySQL Databases allow you to store a large amount of information in an easy to access manner. The databases themselves are not easily read by humans. MySQL databases are required by many web applications including some bulletin boards, content management systems, and others. To use a database, you'll need to create it. Only MySQL Users (different than mail or other users) that have privileges to access a database can read from or write to that database.

Step 1: Create A Database

New Database: linuxrec

Next Step

- Enter a database username (whatever you want, for this I am doing “octest2”).
- Enter a password. For shared hosting, it should be a strong password.
- Click Create user.

MySQL® Database Wizard

The system successfully added the database “[linuxrec_octest2](#)”.

Step 2: Create Database Users

Username: 

Note: -9 characters max.

Password: 

Reenter Password: 

Strength ([Why?](#)): [Password Generator](#)

Create User

[← Go Back](#) | [← Go Back to the Main MySQL Databases Interface](#)

- Check All privileges.
- Click Next step.

Note: Some hosting services will add account specific things to MySQL usernames and database names. Note the red box in the image below. THESE will be the user names and database names we enter into our OpenCATS system.

MySQL® Database Wizard

You successfully created a MySQL user named “[linuxrec_octest2](#)”.

[Step 3: Add a User to the Database](#)

User: [linuxrec_octest2](#)
Database: [linuxrec_octest2](#)

<input checked="" type="checkbox"/> ALL PRIVILEGES	
<input checked="" type="checkbox"/> ALTER	<input checked="" type="checkbox"/> ALTER ROUTINE
<input checked="" type="checkbox"/> CREATE	<input checked="" type="checkbox"/> CREATE ROUTINE
<input checked="" type="checkbox"/> CREATE TEMPORARY TABLES	<input checked="" type="checkbox"/> CREATE VIEW
<input checked="" type="checkbox"/> DELETE	<input checked="" type="checkbox"/> DROP
<input checked="" type="checkbox"/> EVENT	<input checked="" type="checkbox"/> EXECUTE
<input checked="" type="checkbox"/> INDEX	<input checked="" type="checkbox"/> INSERT
<input checked="" type="checkbox"/> LOCK TABLES	<input checked="" type="checkbox"/> REFERENCES
<input checked="" type="checkbox"/> SELECT	<input checked="" type="checkbox"/> SHOW VIEW
<input checked="" type="checkbox"/> TRIGGER	<input checked="" type="checkbox"/> UPDATE

[Next Step](#)

- Go back to the main CPanel dashboard screen.

6.5 CPanel-SSH

- From the main CPanel screen, scroll down to the “security” section.

- Click ssh/shell access, this will open a new browser tab.
- Below that, you will see your SSH login information. Write that down, you'll need the hostname, username and password.

SSH

SSH allows you to perform secure file transfers and remote logins over an encrypted internet connection. Because you must have the private SSH key in order to authenticate a session, it is almost impossible to perform a brute force attack against an SSH connection. You can use this interface to create new SSH keys, import keys, [manage keys](#), or delete keys in order to allow automated logins to SSH.

SSH allows you to securely log in to another computer or server in a network. It provides strong authentication and secure communications over insecure channels. Your login, commands, and text are all encrypted when you use SSH.

Manage SSH Keys

Public and private keys are created together. Public keys reside on the remote server, while private keys reside on your local computer or server. When you attempt to log in to the remote server, SSH compares the public and private keys. If they match, SSH will allow you to log in.

[Manage SSH Keys](#)

SSH Access is **Enabled**

[Manage SSH Access](#)

You may now connect to your shell account using your favorite SSH Client using the following settings:

Hostname: [REDACTED]

Username: [REDACTED]

Password: Your Account Password

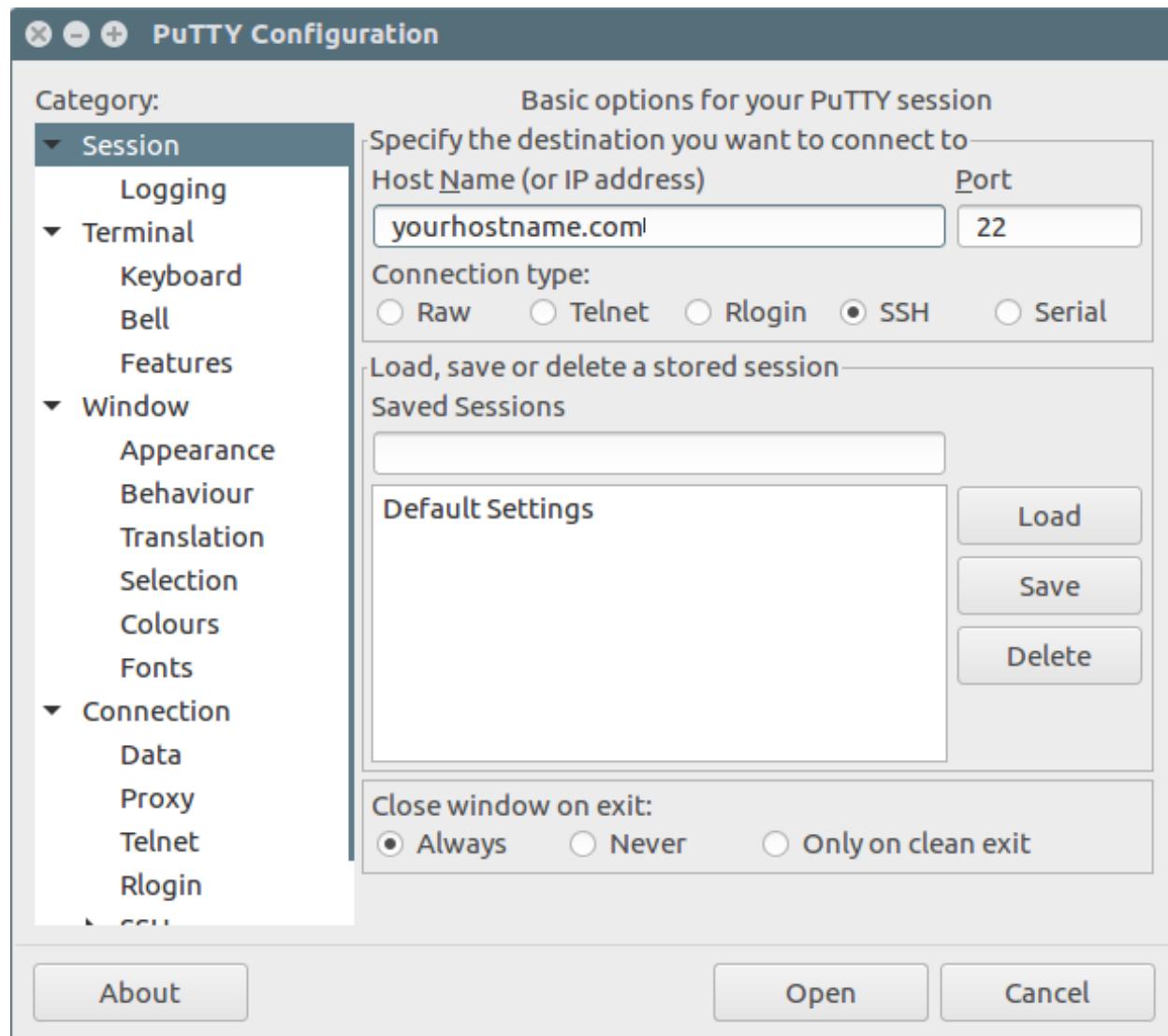
Notice: If you choose to use Key based authentication, please follow the instructions found in the [Manage SSH Keys](#) section.

- Make sure SSH Access is enabled. If it isn't, click the “Manage SSH Access” and enable it.

Note: The password for ssh access will be your main shared-hosting account password (GoDaddy, Bluehost, etc.).

6.6 Install Composer and dependencies

- Open a new browser tab and download a SSH client. Putty works fine. For Windows, download Putty [Here](#)
- For Ubuntu it can be a simple `$ sudo apt-get install putty`
- Open up Putty.
- Enter your hostname in the box towards the top and select SSH.
- Then click open.



- Enter your login name (username). Hit enter.



It will likely ask you to accept a key. Type “yes” to accept that.

- Enter your account password, hit enter.

Now you should just see a black screen with a #. That means you are logged in to your shared hosting account through SSH!

Note: If you renamed the OpenCATS directory, make sure to replace OpenCATS-0.9.3-3 in these commands with whatever your OpenCATS directory is named.

Note: These commands are specific to Bluehost. The directory structure for other hosts may be different.

Type the following commands and hit enter after each one.

- # cd /www/OpenCATS-0.9.3-3
- # curl -sS https://getcomposer.org/installer | php
- # php composer.phar install
- # exit

If composer installed correctly, and it installed all the dependencies correctly you should see some scrolling text. If you see red errors, you’ll need to let us know on the OpenCATS forums.

Warning: Make sure when you are done, to go back through CPanel and DISABLE the SSH access. There is no reason to leave that enabled.

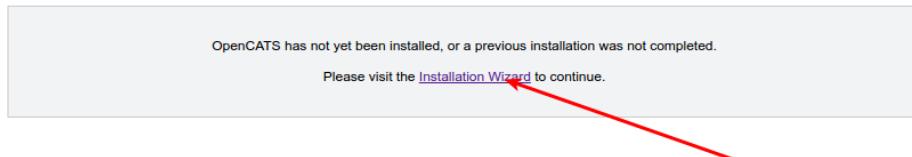
Warning: Seriously....disable your SSH when you are done. You really don't want to leave that open.

6.7 Install the OpenCATS software

In your browser, go to yourdomainname.com/OpenCATS-0.9.3-3 (if you changed the main directory name, replace OpenCATS-0.9.3-3 with the new name).

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. Common yellow errors on shared hosting are for LDAP and SOAP extensions. These extensions are not necessary and you do not lose any functionality.

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

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

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](#)

Welcome to OpenCATS!

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 5.5.9-1ubuntu4.20.
```

```
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.
```

```
PHP LDAP library extension (ldap) is loaded.
```

```
PHP SOAP extension (soap) is loaded.
```

```
PHP zip extension is loaded.
```

```
Directory ./attachments/ is readable (permissions: 0770).
```

```
Directory ./attachments/ is writeable (permissions: 0770).
```

```
Creating a file within ./attachments/ succeeded.
```

```
Directories can be created inside ./attachments//.
```

```
Configuration file ./config.php is writable.
```

```
Creating a file within ./ succeeded.
```

All tests passed successfully!

[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

Note: I usually get red the first few tries after click the test database connectivity button. If you try more than a couple times and it stays red, you have either entered your MySQL/Mariadb information incorrectly, or you have set your MySQL/MariaDB database up incorrectly. It needs to be corrected before proceeding.

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

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 Results

MySQL connection was successful.
MySQL version is 5.5.42.
Database 'linuxrec_opencatstest' selected.
Can create 'testable' table.
Can insert into 'testable' table.
Can update 'testable' table.
Can delete from 'testable' table.
Can drop table 'testable'.

All tests passed successfully!

Step 3: Loading Data

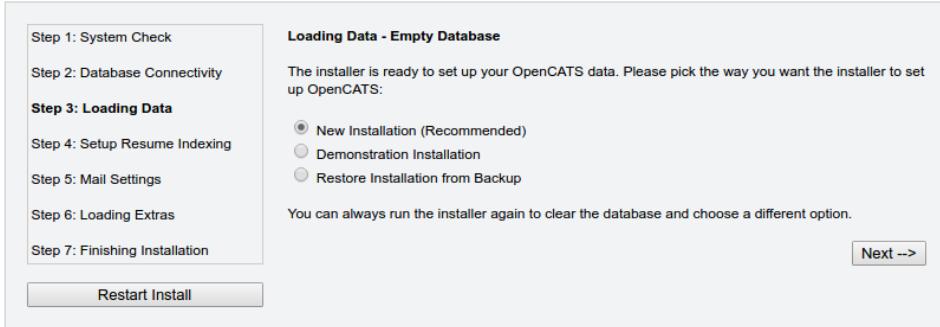
For a new installation, select New Installation, then next

Note: Demonstration Installation will auto-populate 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



Step 4 Setup resume indexing

For a shared hosting environment, you can not use the resume indexing tools. You need root access to install these programs and most shared hosts do not allow that. Occasionally, with a smaller hosting company, you can contact them and request the programs be installed and they will do that.

- Click Skip this step

OpenCATS

Applicant Tracking System

The screenshot shows the 'Resume Indexing Configuration' step of the installation process. On the left, a sidebar lists steps from 1 to 7. Step 4 is selected and titled 'Setup Resume Indexing'. The main area contains four configuration sections for different file types:

- .doc file (Microsoft Word Document)**: Path to Antiword Executable: `\path\to\antiword`
- .pdf file (Adobe Acrobat Document)**: Path to PDFToText Executable: `\path\to\pdftotext`
- .html file (Hypertext Markup Document)**: Path to Html2Text Executable: `\path\to\html2text`
- .rtf file (Rich Text Document)**: Path to UnRTF Executable: `\path\to\unrtf`

Below these are two buttons: 'Test Configuration' and 'Skip this Step'. A red box highlights 'Test Results' which show errors for each of the four configurations. It also displays a message about failing tests and a link to forums.

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

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: `\path\to\antiword`

.pdf file (Adobe Acrobat Document)
Path to PDFToText Executable: `\path\to\pdftotext`

.html file (Hypertext Markup Document)
Path to Html2Text Executable: `\path\to\html2text`

.rtf file (Rich Text Document)
Path to UnRTF Executable: `\path\to\unrtf`

[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](#)

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!

If you do not know what your settings are, or don't want the mail functionality in OpenCATS, click the drop-down bar and select None.

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

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

Mail Settings

Please enter your e-mail address (for where OpenCATS e-mails should be replied to, etc.).

E-mail: *

OpenCATS sends automatic E-Mails on different events. Please choose the mechanism for E-Mail delivery via OpenCATS.

Mail Support: *	<input type="text" value="SMTP w/Authorization"/>
SMTP Host: *	<input type="text" value="localhost"/>
SMTP Port: *	<input type="text" value="587"/>
SMTP Username: *	<input type="text" value="user"/>
SMTP Password: *	<input type="text" value="password"/>

Next -->

Step 6 Loading extras

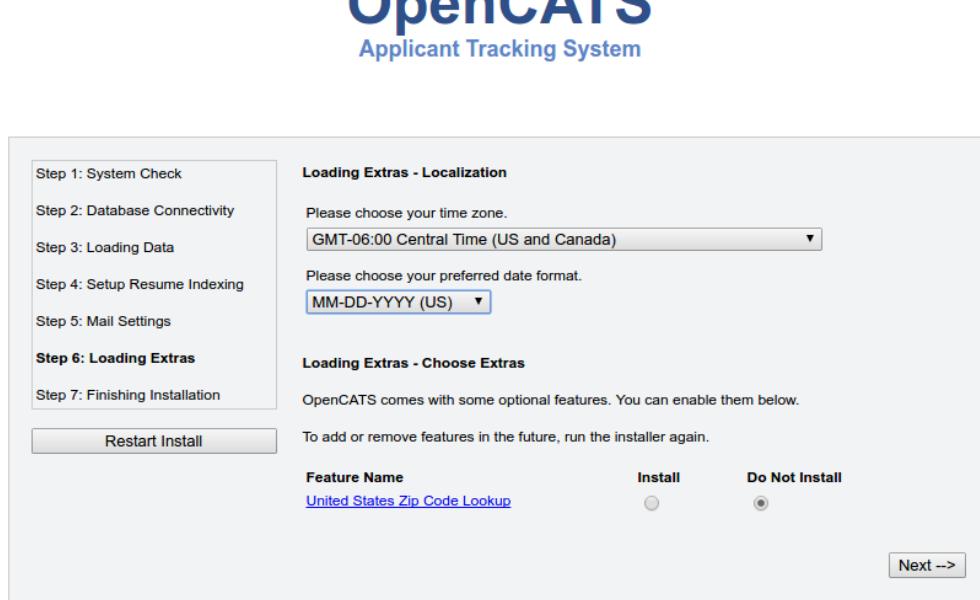
Don't forget to set the time zone to your area!

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

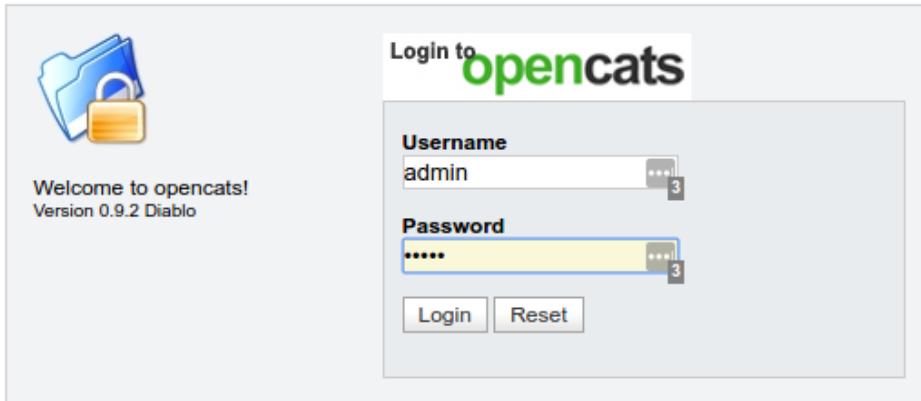


Step 7 Finishing installation

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.



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

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Based upon original work and Powered by [CATS](#).

Success!!

Your brand new OpenCATS applicant System!

The screenshot shows the OpenCATS 0.9.3 dashboard. At the top right, there is a 'Logout' link and a message indicating the user is 'CATS Administrator <admin> (testdomain.com) Administrator'. Below the header is a navigation bar with links: Dashboard, Activities, Job Orders, Candidates, Companies, Contacts, Lists, Calendar, Reports, and Settings. A 'Quick Search' field with a 'Go' button is also present.

The main content area is divided into several sections:

- Recent Hires:** A table with columns: Name, Company, Recruiter, Date. It displays the message "NO DATA".
- Hiring Overview:** A bar chart titled "Hiring Overview" showing data from 04/25 - 05/01 to 05/16 - 05/22. The chart has three bars: one orange bar for Interviews (value 1), one blue bar for Submissions (value 1), and one green bar for Hires (value 0). The chart also displays the message "NO DATA".
- Important Candidates:** A table listing candidates with columns: First Name, Last Name, Status, Position, Company, and Modified. It displays the message "NO DATA".

CATS Version 0.9.2 Diablo. Powered by [CATS](#).

Server Response Time: 0.05 seconds.
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Warning: Now you have a shiny, new Applicant tracking system...change your admin password...RIGHT...NOW. Click Settings then change password. Do...it...right...now.

Install Scripts-Linux

These install scripts will dramatically reduce the time and effort necessary for installing OpenCATS on a Linux system. **HOWEVER**, there are some very specific requirements that must be met for using these scripts. If you don't meet these requirements, there is no telling what can happen to any web-software that you are running from the system you use this script on.

Warning: These scripts are ONLY for Linux systems that do not have Apache, MySQL/MariaDB and PHP installed. This will install a full lamp stack from scratch. It will likely wipe out any existing settings that are in place. I can not stress this enough.

Having gotten that out of the way, let's proceed.

Open a terminal

Note: If you get a wget error, install wget. `sudo apt-get install wget` in Ubuntu and Debian, `sudo yum install wget` in CentOS.

7.1 Get the correct script for your distribution

Wget the install script for your Distro by typing/copy-paste the following into your terminal. Ubuntu 14.04: `$ wget https://raw.githubusercontent.com/cptr13/OpenCATS-Installation-Scripts/blob/master/Ubuntu14.04.sh`
Ubuntu 16.04: `$ wget https://raw.githubusercontent.com/cptr13/OpenCATS-Installation-Scripts/master/Ubuntu16.04.sh`
Debian 8: `$ wget https://raw.githubusercontent.com/cptr13/OpenCATS-Installation-Scripts/master/Debian8.sh`
CentOS 7: `$ wget https://raw.githubusercontent.com/cptr13/OpenCATS-Installation-Scripts/master/CentOS7.sh`

List directory to see the file name: `ls`

Make the script executable: `sudo chmod +x script-name.sh`

Run the script: `sudo ./script-name.sh`

Wait until it is finished.

7.2 Install the OpenCATS software

In your browser, go to <http://localhost/opencats>

Click: Installation Wizard

OpenCATS

Applicant Tracking System



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.

If there are no issues, it should be all green, click Next

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](#)

Welcome to OpenCATS!

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 5.5.9-1ubuntu4.20.  
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.  
PHP LDAP library extension (ldap) is loaded.  
PHP SOAP extension (soap) is loaded.  
PHP zip extension is loaded.  
Directory ./attachments/ is readable (permissions: 0770).  
Directory ./attachments/ is writeable (permissions: 0770).  
Creating a file within ./attachments/ succeeded.  
Directories can be created inside ./attachments//.  
Configuration file ./config.php is writable.  
Creating a file within ./ succeeded.
```

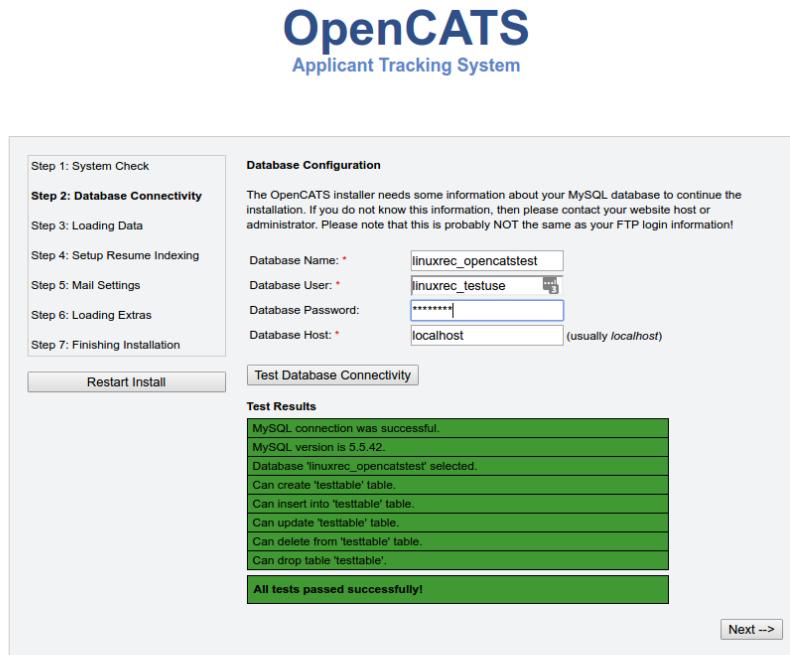
All tests passed successfully!

[Next ->](#)

Step 2: Database connectivity

Do NOT change anything here. Use the default information.

Click Test Database Connectivity



If you see all green, click next

Step 3: Loading Data

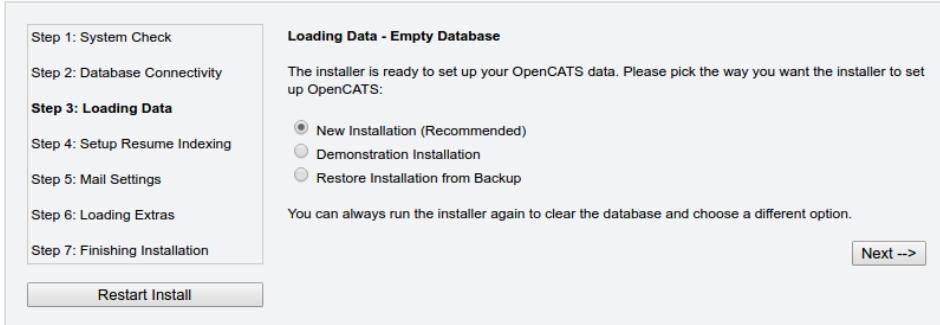
For a new installation, select New Installation, then next

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

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

OpenCATS

Applicant Tracking System



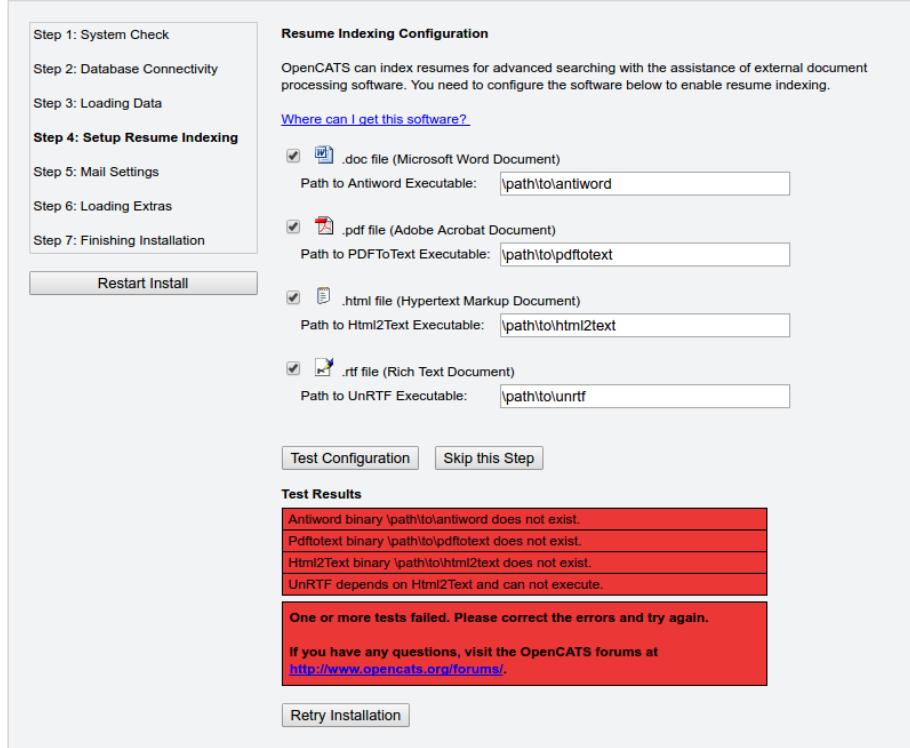
Step 4 Setup resume indexing

- Change the paths to the executables to the correct paths. They should be as follows:
- /usr/bin/antiword
- /usr/bin/pdftotext
- /usr/bin/html2text
- /usr/bin/unrtf
- Click Test Configuration

Note: I always get red the first couple clicks, then it will go green. If you get green, proceed. If it stays red after a few click, the system isn't recognizing the executables. There may be a path issue that needs corrected.

OpenCATS

Applicant Tracking System



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

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

E-mail: *

Mail Support: *

SMTP Host: *

SMTP Port: *

SMTP Username: *

SMTP Password: *

Next -->

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...

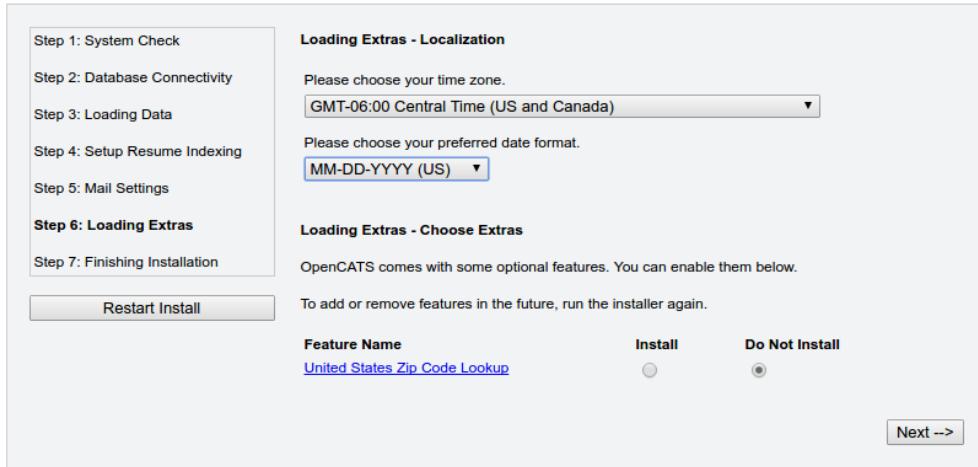
Choose the date format you like best

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

Click next

OpenCATS

Applicant Tracking System

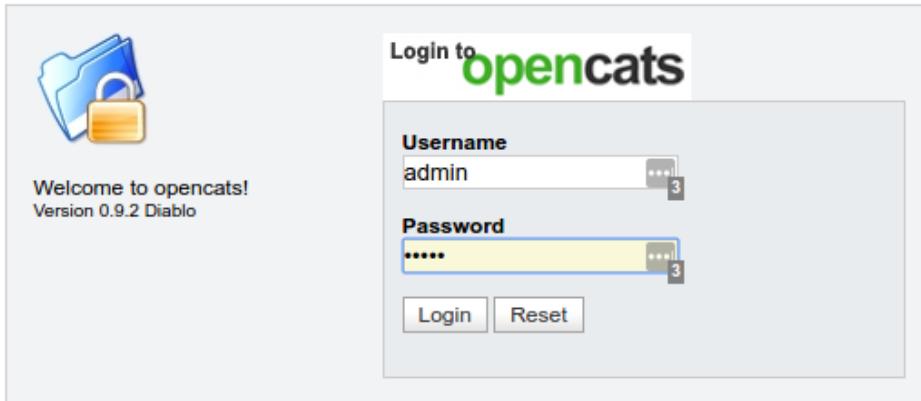


Step 7 Finishing installation

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.



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

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Based upon original work and Powered by [CATS](#).

Success!!

Your brand new OpenCATS applicant System!

opencats
open. online. free.

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

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.
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Install on Ubuntu 14.04

These instructions will walk you through setting up LAMP (Linux Apache Mysql PHP) software and install Open-CATS on a Ubuntu 14.04 machine. These instructions will work with a VPS, or a home/office machine.

Note: If this is a production machine, that is accessible by people outside your network, this walk-through doesn't address additional server security. You would definitely want to make sure things are secured correctly.

Warning: If you are running a different version of Ubuntu (other than 14.04) the default software versions will be different, which means the install process **will be different**.

8.1 Ubuntu14.04-Installing MySQL 5/Mariadb

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

- \$ sudo apt-get update
- \$ sudo apt-get install mariadb-server mariadb-client
- Enter a password for the MySQL/Mariadb root user. Write it down... For this walk-through I am using mariadbpassword as the password.
- \$ mysql_secure_installation

8.2 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 up the root password yet, **the password will be blank**, so you should just press enter here. If you **have set up a MySQL/MariaDB root password already** you will enter it 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!

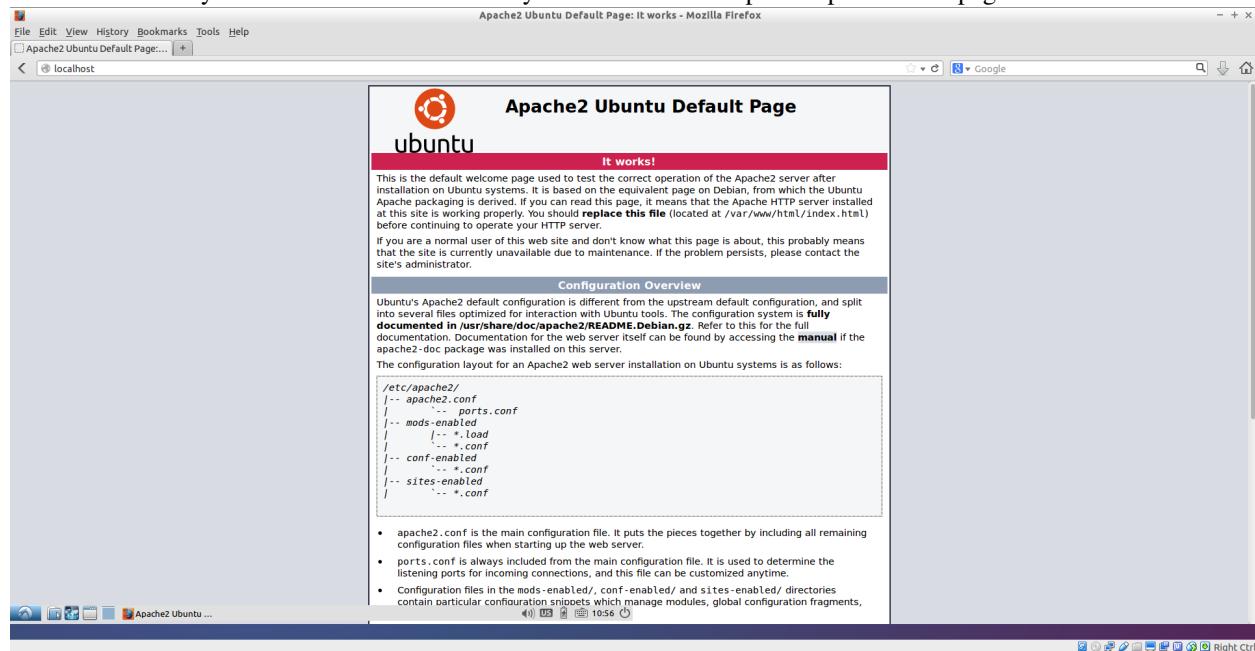
8.3 Ubuntu14.04-Installing Apache2

- \$ sudo apt-get install apache2

8.4 Check for success-Apache

Note: In this tutorial, we use localhost, if you're running a vps, you may need to enter the correct IP Address. These settings might differ for you, so you have to replace them where appropriate.

- Now direct your browser to localhost and you should see the Apache2 placeholder page:



8.5 Ubuntu14.04-Installing PHP5

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

8.6 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.

- \$ sudo nano /var/www/html/info.php
- Type or paste the following into it and save as info.php:

```
1 <?php
2  phpinfo();
3 ?>
```

- Ctl-O then enter to save the file
- Ctl-X to exit nano
- \$ sudo service apache2 restart
- In your browser, go to localhost/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.

8.7 Ubuntu14.04-Getting MySQL Support In PHP5

- \$ sudo apt-get install php5-mysql php5-gd php-soap php5-ldap

- \$ sudo service apache2 restart
- Now reload localhost/info.php in your browser and you should see the new php modules listed when you scroll down through the information.

8.8 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 few 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 'opencats'@'localhost' IDENTIFIED BY 'databasepassword';
- mysql> CREATE DATABASE opencats;
- mysql> GRANT ALL PRIVILEGES ON 'opencats'.* TO 'opencats'@'localhost' IDENTIFIED BY 'databasepassword';
- mysql> exit;

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

8.9 Download the OpenCATS files

- cd /var/www/html
- \$ sudo wget https://github.com/opencats/OpenCATS/archive/0.9.3-3.tar.gz
- \$ sudo tar -xvzf 0.9.3-3.tar.gz
- \$ cd OpenCATS-0.9.3-3
- \$ ls Now we should see all of the OpenCATS files in the OpenCATS directory

Note: By default, this directory is named OpenCATS0.9.3-3. You can name it whatever you want. Just remember that all of the directory locations from here on must match the name of the directory you create, including capital letters.

Note: If you have tried installing OpenCATS before, or for any reason see something called INSTALL_BLOCK in this directory, you MUST delete it. This will prevent OpenCATS from installing. The command for that would be \$ sudo rm INSTALL_BLOCK.

8.10 Server and Directory permissions

- \$ cd .. to go up one directory into the main html folder
- \$ sudo chown www-data:www-data OpenCATS-0.9.3-3

Warning: make sure this is set to **EXACTLY** the name of your OpenCATS directory, default for version 0.9.3-3 would be OpenCATS-0.9.3-3

- \$ sudo chown -R www-data:www-data OpenCATS-0.9.3-3
- \$ sudo chmod 770 OpenCATS-0.9.3-3/attachments
- \$ sudo chmod 770 OpenCATS-0.9.3-3/upload

8.11 Install resume indexing tools

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

8.12 Install the OpenCATS software

In your browser, go to localhost/OpenCATS-0.9.3-3 (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.

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

The screenshot shows the 'Step 1: System Check' page of the OpenCATS setup. On the left, a sidebar lists steps from 1 to 7. Step 1 is highlighted in yellow. A 'Restart Install' button is at the bottom of the sidebar. The main area has a title 'Welcome to OpenCATS!' and a descriptive paragraph about running tests. Below that is a 'Test Results' section with a green background. It lists various PHP extensions and system checks, all of which have passed successfully. At the bottom of this section is a green bar stating 'All tests passed successfully!'. A 'Next ->' button is located at the bottom right of the main area.

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

Welcome to OpenCATS!

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 5.5.9-1ubuntu4.20.  
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.  
PHP LDAP library extension (ldap) is loaded.  
PHP SOAP extension (soap) is loaded.  
PHP zip extension is loaded.  
Directory ./attachments/ is readable (permissions: 0770).  
Directory ./attachments/ is writeable (permissions: 0770).  
Creating a file within ./attachments/ succeeded.  
Directories can be created inside ./attachments//.  
Configuration file ./config.php is writable.  
Creating a file within ./ succeeded.
```

All tests passed successfully!

Next ->

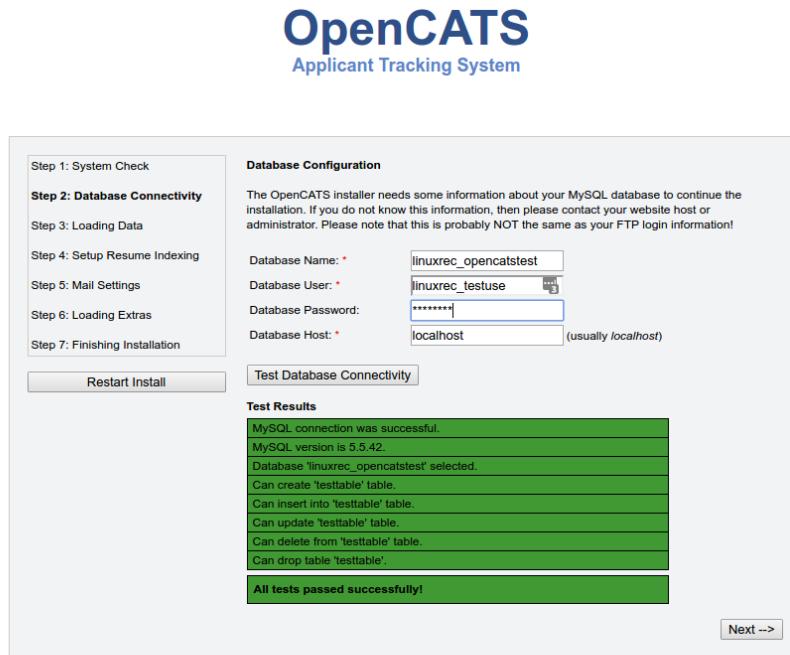
Step 2: Database connectivity

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**

Note: I usually get red the first few tries after click the **test database connectivity** button. If you try more than a couple times and it stays red, you have either entered your MySQL/Mariadb information incorrectly, or you have set your MySQL/MariaDB database up incorrectly. It needs to be corrected before proceeding.



Step 3: Loading Data

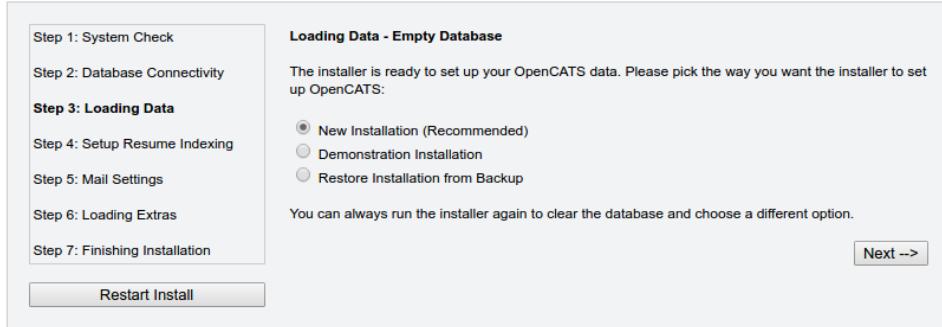
For a new installation, select New Installation, then next

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



Step 4 Setup resume indexing

- Change the paths to the executables to the correct paths. They should be as follows:
- /usr/bin/antiword
- /usr/bin/pdftotext
- /usr/bin/html2text
- /usr/bin/unrtf
- Click Test Configuration

Note: Like earlier, I always get red the first couple clicks, then it will go green. If you get green, proceed. If it stays red after a few click, the system isn't recognizing the executables. There may be a path issue that needs corrected.

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 lpath\to\antiword does not exist.
Pdftotext binary lpath\to\pdftotext does not exist.
Html2Text binary lpath\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 wizard. On the left, a sidebar lists steps from 1 to 7. Step 5 is highlighted as 'Mail Settings'. Below the sidebar, there's a 'Mail Support:' dropdown set to 'SMTP w/Authorization', and fields for 'SMTP Host' (localhost), 'SMTP Port' (587), 'SMTP Username' (user), and 'SMTP Password' (password). A note above the form says: 'Please enter your e-mail address (for where OpenCATS e-mails should be replied to, etc.).' An 'E-mail:' field contains 'admin@testdomain.com'. A 'Next -->' button is at the bottom right.

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...

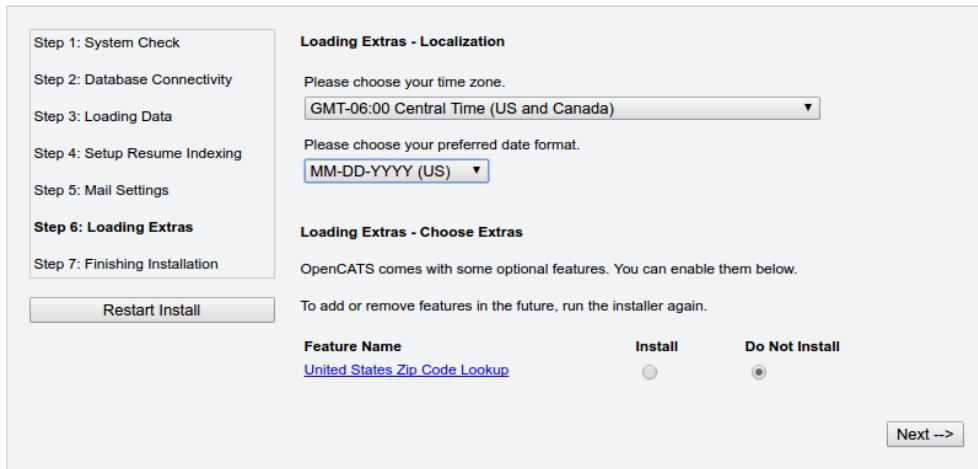
Choose the date format you like best

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

Click next

OpenCATS

Applicant Tracking System

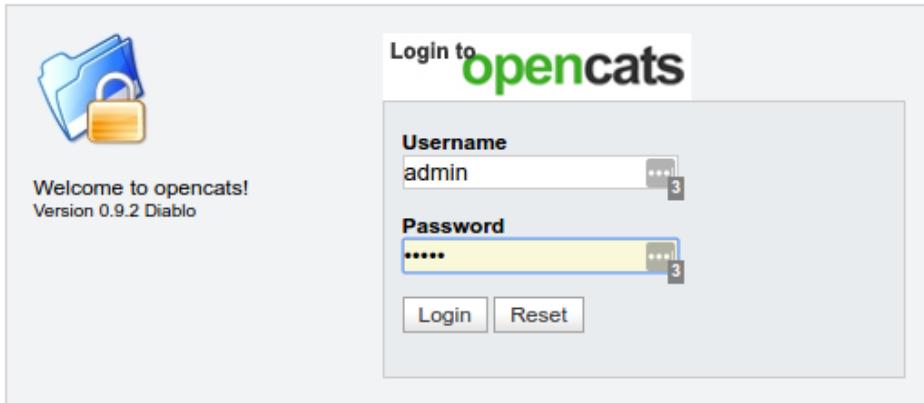


Step 7 Finishing installation

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.



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

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Based upon original work and Powered by [CATS](#).

Success!!

Your brand new OpenCATS applicant System!

opencats
open. online. free.

[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

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 Ubuntu 16.04

These instructions will walk you through setting up LAMP (Linux Apache Mysql PHP) software and install Open-CATS on a Ubuntu 16.04 machine. These instructions will work with a VPS, or a home/office machine.

Note: If this is a production machine, that is accessible by people outside your network, this walk-through doesn't address additional server security. You would definitely want to make sure things are secured correctly.

Warning: If you are running a different version of Ubuntu (other than 16.04) the default software versions will be different, which means the install process **will be different**.

9.1 Ubuntu16.04-Installing MySQL 5/Mariadb

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

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

9.2 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 up the root password yet, **the password will be blank**, so you should just press enter here. If you **have set up a MySQL/MariaDB root password already** you will enter it 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!

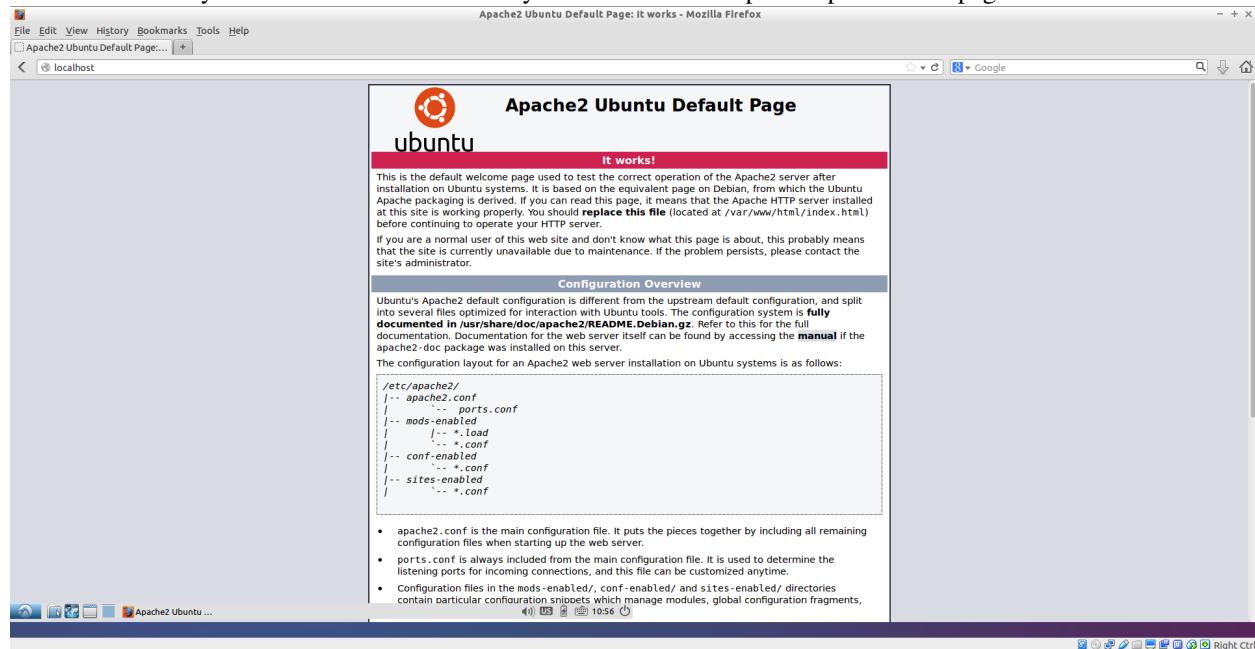
9.3 Ubuntu16.04-Installing Apache2

- \$ sudo apt-get install apache2

9.4 Check for success-Apache

Note: In this tutorial, we use localhost, if you're running a vps, you may need to enter the correct IP Address. These settings might differ for you, so you have to replace them where appropriate.

- Now direct your browser to localhost and you should see the Apache2 placeholder page:



9.5 Ubuntu16.04-Installing PHP5.6

Note: Php7 is default in Ubuntu 16.04. At this time, OpenCATS doesn't support php7. So we'll need to install php5.6 to work with OpenCATS. DO NOT install the default php (v7). If you do, or already have it running, you'll need to

downgrade your Ubuntu system to php5.6.

- \$ sudo add-apt-repository ppa:ondrej/php
- \$ sudo apt-get update
- \$ sudo apt-get install php5.6 php5.6-soap php5.6-ldap
- \$ sudo apt-get install php5.6-mysql php5.6-gd php5.6-xml
- \$ sudo apt-get install php5.6-curl php5.6-mbstring php5.6-zip
- \$ sudo service apache2 restart

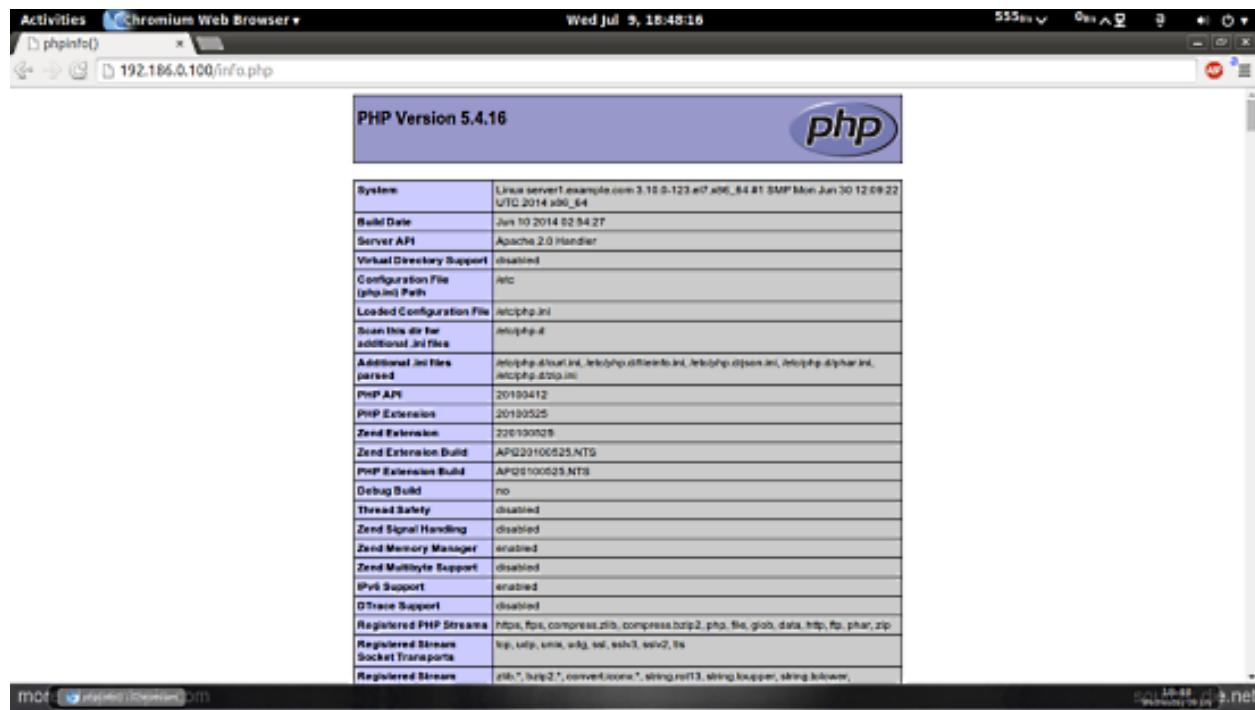
9.6 Testing PHP5.6 / Getting Details About Your PHP5 Installation

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.

- \$ sudo nano /var/www/html/info.php
- Type or paste the following into it and save as info.php:

```
1 <?php  
2     phpinfo();  
3 ?>
```

- Ctl-O then enter to save the file
- Ctl-X to exit nano
- \$ sudo service apache2 restart
- In your browser, go to localhost/info.php



If you see this screen, everything is good. Scroll down and check to make sure all the extensions are there, then 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.

9.7 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 few minutes.

- \$ sudo mysql -u root -p

It will ask you for your Ubuntu Root password

Then it will ask you for your mysql root password

- You should see a prompt like this: mysql>
- mysql> CREATE USER 'opencats'@'localhost' IDENTIFIED BY 'databasepassword';
- mysql> CREATE DATABASE opencats;
- mysql> GRANT ALL PRIVILEGES ON 'opencats'.* TO 'opencats'@'localhost' IDENTIFIED BY 'databasepassword';

- mysql> exit;

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

9.8 Download the OpenCATS files

- cd /var/www/html
- \$ sudo wget https://github.com/opencats/OpenCATS/archive/0.9.3-3.tar.gz
- \$ sudo tar -xvzf 0.9.3-3.tar.gz
- \$ cd OpenCATS-0.9.3-3
- \$ ls Now we should see all of the OpenCATS files in the OpenCATS directory

Note: By default, this directory is named OpenCATS0.9.3-3. You can name it whatever you want. Just remember that all of the directory locations from here on must match the name of the directory you create, including capital letters.

Note: If you have tried installing OpenCATS before, or for any reason see something called INSTALL_BLOCK in this directory, you MUST delete it. This will prevent OpenCATS from installing. The command for that would be \$ sudo rm INSTALL_BLOCK.

9.9 Composer

- \$ sudo apt-get install composer
- \$ sudo composer install

If everything has gone correctly up to this point, composer will install a few things and get to the end with no errors.

9.10 Server and Directory permissions

- \$ cd .. to go up one directory into the main html folder
- \$ sudo chown www-data:www-data OpenCATS-0.9.3-3

Warning: make sure this is set to **EXACTLY** the name of your OpenCATS directory, default for version 0.9.3-3 would be OpenCATS-0.9.3-3

- \$ sudo chown -R www-data:www-data OpenCATS-0.9.3-3
- \$ sudo chmod 770 OpenCATS-0.9.3-3/attachments
- \$ sudo chmod 770 OpenCATS-0.9.3-3/upload

9.11 Install resume indexing tools

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

9.12 Install the OpenCATS software

In your browser, go to localhost/OpenCATS-0.9.3-3 (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.

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

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

Welcome to OpenCATS!

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 5.5.9-1ubuntu4.20.
 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.
 PHP LDAP library extension (ldap) is loaded.
 PHP SOAP extension (soap) is loaded.
 PHP zip extension is loaded.
 Directory ./attachments/ is readable (permissions: 0770).
 Directory ./attachments/ is writeable (permissions: 0770).
 Creating a file within ./attachments/ succeeded.
 Directories can be created inside ./attachments/.
 Configuration file ./config.php is writable.
 Creating a file within ./ succeeded.

All tests passed successfully!

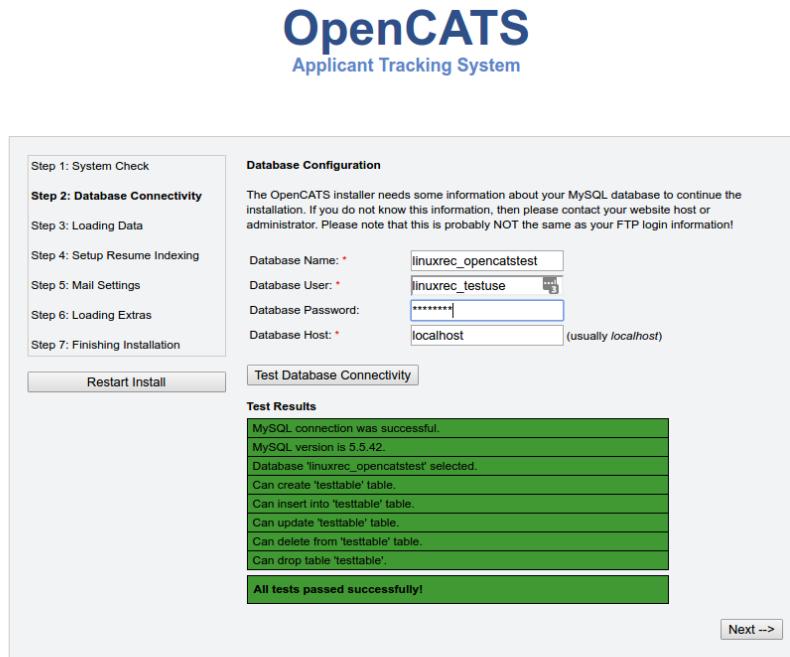
Step 2: Database connectivity

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

Note: I usually get red the first few tries after click the test database connectivity button. If you try more than a couple times and it stays red, you have either entered your MySQL/Mariadb information incorrectly, or you have set your MySQL/MariaDB database up incorrectly. It needs to be corrected before proceeding.



Step 3: Loading Data

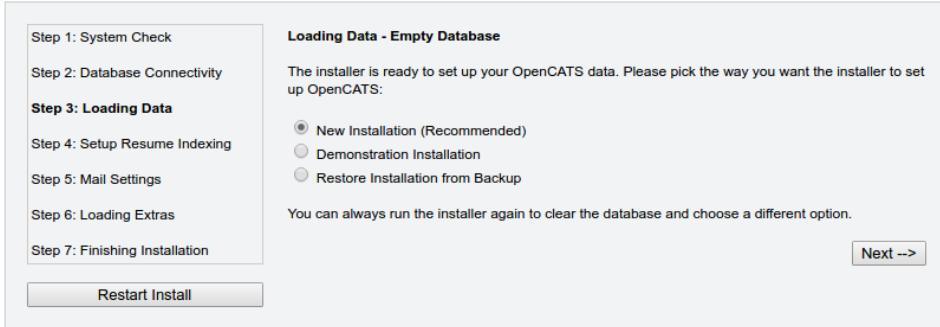
For a new installation, select New Installation, then next

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



Step 4 Setup resume indexing

- Change the paths to the executables to the correct paths. They should be as follows:
- /usr/bin/antiword
- /usr/bin/pdftotext
- /usr/bin/html2text
- /usr/bin/unrtf
- Click Test Configuration

Note: Like earlier, I always get red the first couple clicks, then it will go green. If you get green, proceed. If it stays red after a few click, the system isn't recognizing the executables. There may be a path issue that needs corrected.

OpenCATS

Applicant Tracking System

The screenshot shows the 'Step 4: Setup Resume Indexing' configuration page. On the left, a sidebar lists steps from 1 to 7. Step 4 is highlighted. A 'Restart Install' button is at the bottom of the sidebar.

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](#)

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

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

Mail Settings

Please enter your e-mail address (for where OpenCATS e-mails should be replied to, etc.).

E-mail: *

OpenCATS sends automatic E-Mails on different events. Please choose the mechanism for E-Mail delivery via OpenCATS.

Mail Support: *	<input type="text" value="SMTP w/Authorization"/>
SMTP Host: *	<input type="text" value="localhost"/>
SMTP Port: *	<input type="text" value="587"/>
SMTP Username: *	<input type="text" value="user"/>
SMTP Password: *	<input type="text" value="password"/>

Next -->

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...

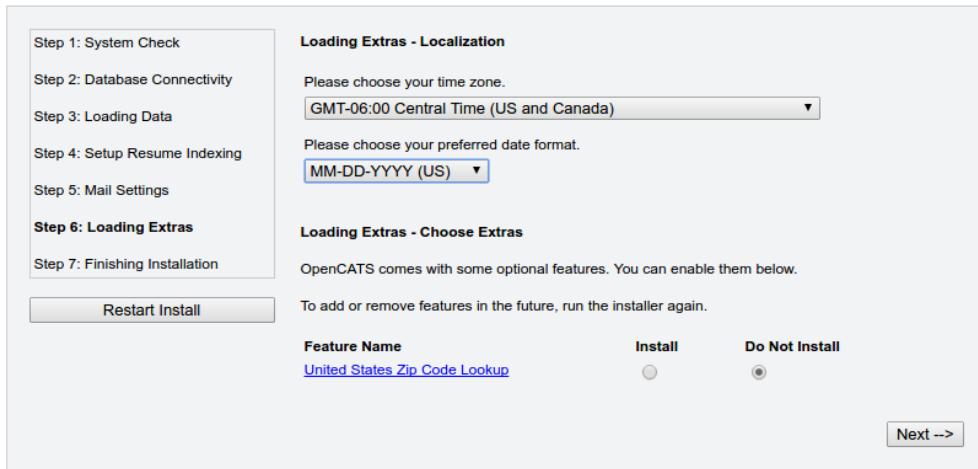
Choose the date format you like best

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

Click next

OpenCATS

Applicant Tracking System

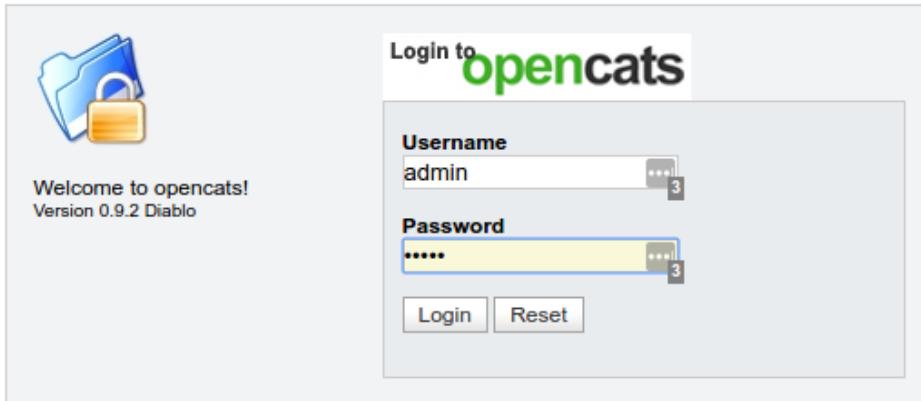


Step 7 Finishing installation

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.



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.

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

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 Hiring Overview

Name Company Recruiter Date

NO DATA

Hiring Overview

Weekly
Monthly
Yearly

Submissions Interviews Hires

0 1
04/25 - 05/01 05/02 - 05/08 05/09 - 05/15 05/16 - 05/22

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

First Name Last Name Status Position Company Modified ▲

NO DATA

The screenshot shows the OpenCATS application interface. At the top, there's a navigation bar with links for Dashboard, Activities, Job Orders, Candidates, Companies, Contacts, Lists, Calendar, Reports, and Settings. A quick search bar is also present. Below the navigation, there are three main sections: 'Recent Hires' (empty), 'Hiring Overview' (empty bar chart), and 'Important Candidates' (empty list). All these sections display the text 'NO DATA'.

CATS Version 0.9.2 Diablo. Powered by [CATS](#).

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

Install on Debian 8 Jessie

These instructions will walk you through setting up LAMP (Linux Apache Mysql PHP) software and install OpenCATS on a Debian 8 machine. These instructions will work with a VPS, or a home/office machine.

Note: If this is a production machine, that is accessible by people outside your network, this walk-through doesn't address additional server security. You would definitely want to make sure things are secured correctly.

Warning: If you are running a different version of Debian (other than 8) the default software versions will be different, which means the install process **will be different**.

10.1 Debian 8-Installing MySQL/Mariadb

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

- \$ sudo apt-get update
- \$ sudo apt-get install mariadb-server mariadb-client
- Enter in the MariaDB/MYSQL root password you want to use. I am using mariadbpassword in this walkthrough
- \$ sudo mysql_secure_installation

10.2 Securing-MySQL/MariaDB

- Enter current password for root (enter for none): Enter
- Set root password? [Y/n] n
- 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!

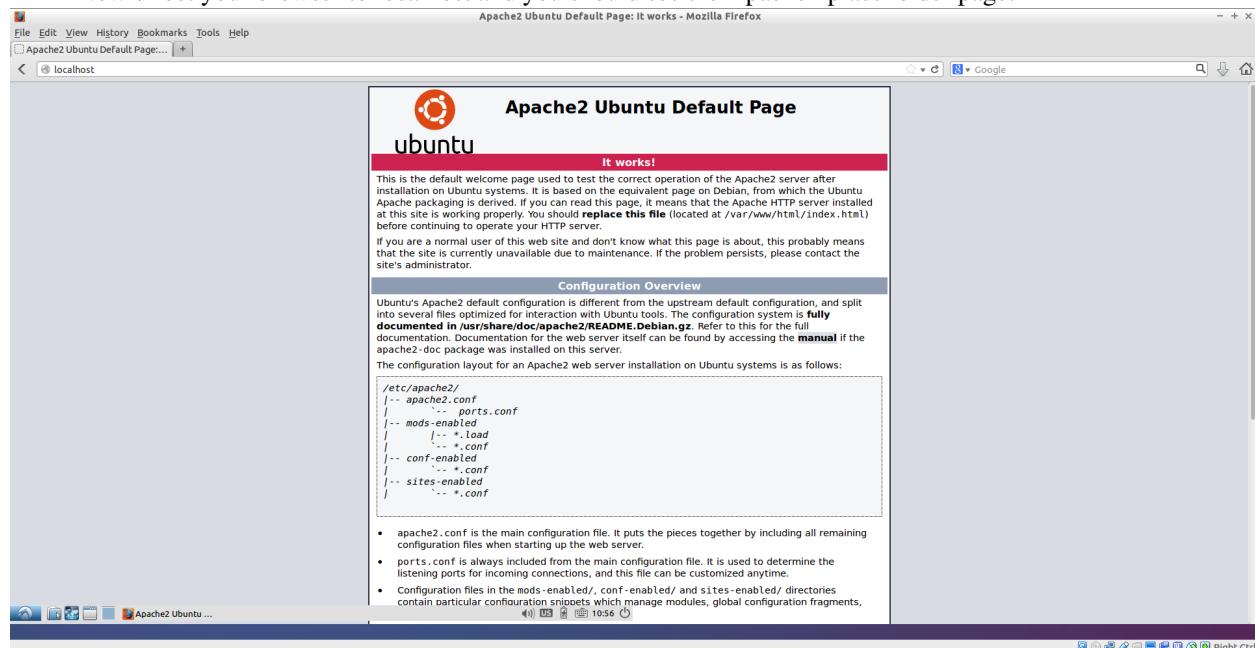
10.3 Debian 8-Installing Apache2

- \$ sudo apt-get install apache2

10.4 Check for success-Apache

Note: In this tutorial, we use localhost, if you're running a vps, you may need to enter the correct IP Address. These settings might differ for you, so you have to replace them where appropriate.

- Now direct your browser to localhost and you should see the Apache2 placeholder page:



10.5 Debian 8-Installing PHP5.6

- \$ sudo apt-get install php5 php-soap php5-ldap php5-mysql php5-gd php5-curl
- \$ sudo service apache2 restart

Note: If you are typing these commands, the soap extension does not have a “5” on php. It’s easy to overlook.

10.6 Testing PHP5.6 / 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.

- \$ sudo nano /var/www/html/info.php
- Type or paste the following into it and save as info.php:

```
1 <?php
2     phpinfo();
3 ?>
```

- Ctl-O then enter to save the file
- Ctl-X to exit nano
- \$ sudo service apache2 restart
- In your browser, go to localhost/info.php



If you see this screen, everything is good. Scroll down and check to make sure all the extensions are there, then 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.

10.7 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 few minutes.

- \$ mysql -u root -p

Then it will ask you for your mariadb/mysql root password

- You should see a prompt like this: mysql>
- mysql> CREATE USER 'opencats'@'localhost' IDENTIFIED BY 'databasepassword';

Note: the “databasepassword” is not the same as the mariadb/mysql root password, and it won’t be the same as your OpenCATS password. All three of these are separate things. You can use whatever passwords you want. Just write them down and differentiate which is which.

- mysql> CREATE DATABASE opencats;
- mysql> GRANT ALL PRIVILEGES ON 'opencats'.* TO 'opencats'@'localhost' IDENTIFIED BY 'databasepassword';
- mysql> exit;

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

10.8 Download the OpenCATS files

- cd /var/www/html
- \$ sudo wget https://github.com/opencats/OpenCATS/archive/0.9.3-3.tar.gz
- \$ sudo tar -xvzf 0.9.3-3.tar.gz
- \$ cd OpenCATS-0.9.3-3
- \$ ls Now we should see all of the OpenCATS files in the OpenCATS directory

Note: By default, this directory is named OpenCATS0.9.3-3. You can name it whatever you want. Just remember that all of the directory locations from here on must match the name of the directory you create, including capital letters.

Note: If you have tried installing OpenCATS before, or for any reason see something called INSTALL_BLOCK in this directory, you MUST delete it. This will prevent OpenCATS from installing. The command for that would be \$ sudo rm INSTALL_BLOCK.

10.9 Composer

- \$ cd /usr/src
- \$ curl -sS https://getcomposer.org/installer | sudo php --install-dir=/usr/local/bin --filename=composer
- \$ cd /var/www/html/OpenCATS-0.9.3-3
- \$ sudo composer install

If everything has gone correctly up to this point, composer will install a few things and get to the end with no errors.

10.10 Server and Directory permissions

- \$ cd .. to go up one directory into the main html folder
- \$ sudo chown www-data:www-data OpenCATS-0.9.3-3

Warning: make sure this is set to **EXACTLY** the name of your OpenCATS directory, default for version 0.9.3-3 would be OpenCATS-0.9.3-3

- \$ sudo chown -R www-data:www-data OpenCATS-0.9.3-3
- \$ sudo chmod 770 OpenCATS-0.9.3-3/attachments
- \$ sudo chmod 770 OpenCATS-0.9.3-3/upload

10.11 Install resume indexing tools

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

10.12 Install the OpenCATS software

In your browser, go to localhost/OpenCATS-0.9.3-3 (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

OpenCATS

Applicant Tracking System



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.

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

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](#)

Welcome to OpenCATS!

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 5.5.9-1ubuntu4.20.
```

```
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.
```

```
PHP LDAP library extension (ldap) is loaded.
```

```
PHP SOAP extension (soap) is loaded.
```

```
PHP zip extension is loaded.
```

```
Directory ./attachments/ is readable (permissions: 0770).
```

```
Directory ./attachments/ is writeable (permissions: 0770).
```

```
Creating a file within ./attachments/ succeeded.
```

```
Directories can be created inside ./attachments//.
```

```
Configuration file ./config.php is writable.
```

```
Creating a file within ./ succeeded.
```

All tests passed successfully!

[Next ->](#)

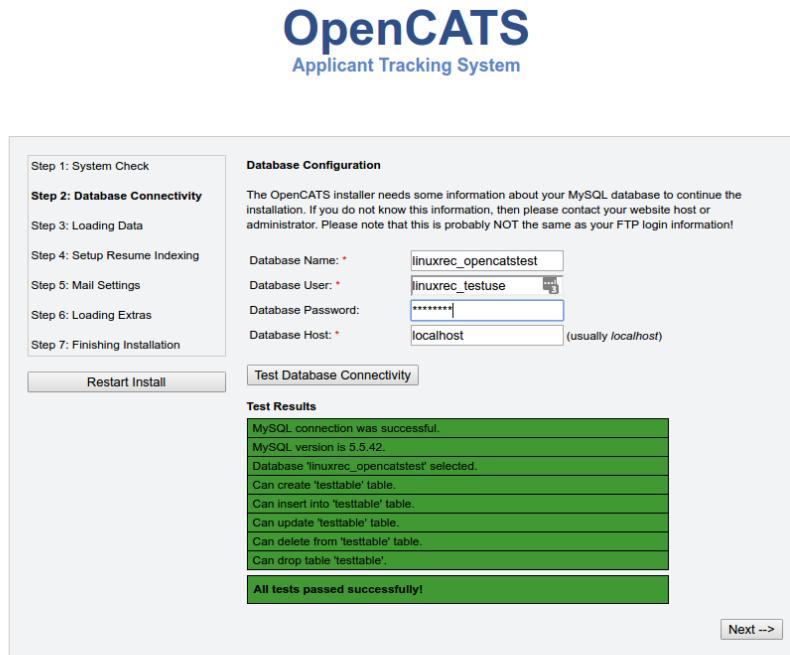
Step 2: Database connectivity

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

Note: I usually get red the first few tries after click the test database connectivity button. If you try more than a couple times and it stays red, you have either entered your MySQL/Mariadb information incorrectly, or you have set your MySQL/MariaDB database up incorrectly. It needs to be corrected before proceeding.



Step 3: Loading Data

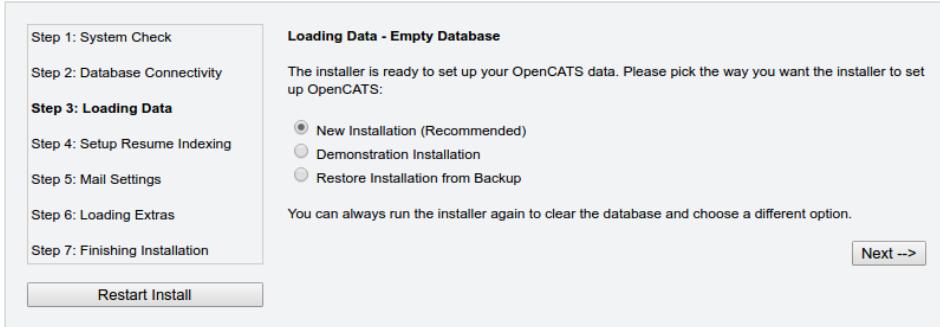
For a new installation, select New Installation, then next

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

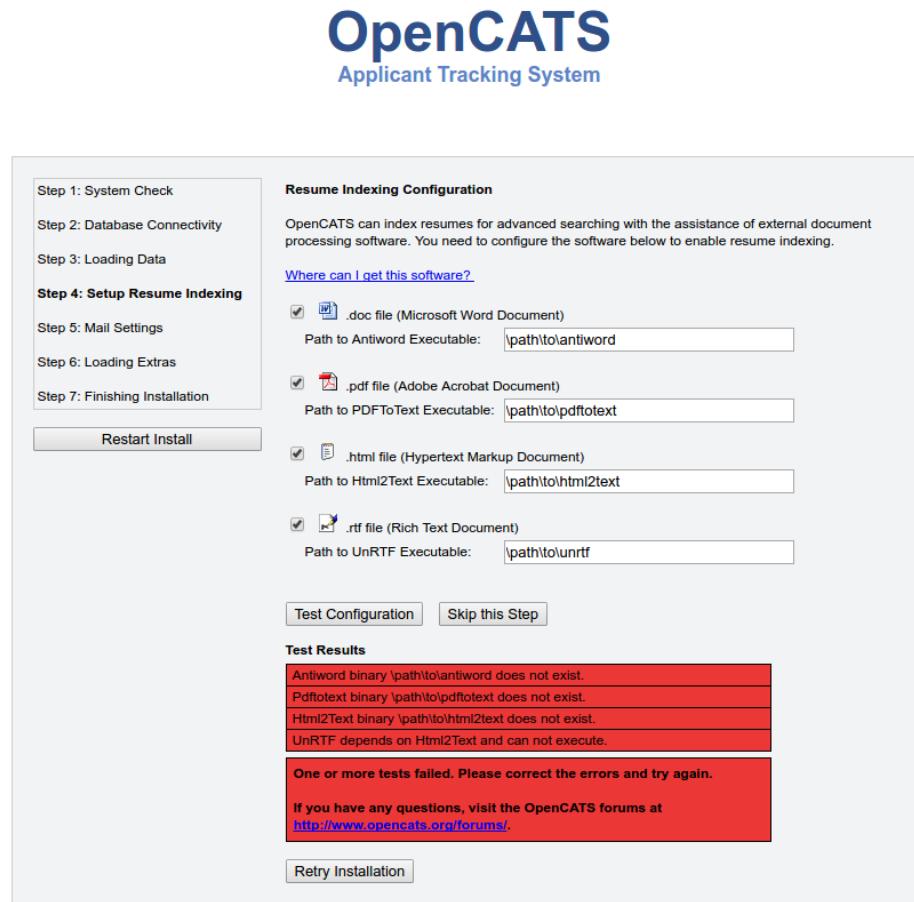
Applicant Tracking System



Step 4 Setup resume indexing

- Change the paths to the executables to the correct paths. They should be as follows:
- /usr/bin/antiword
- /usr/bin/pdftotext
- /usr/bin/html2text
- /usr/bin/unrtf
- Click Test Configuration

Note: Like earlier, I always get red the first couple clicks, then it will go green. If you get green, proceed. If it stays red after a few click, the system isn't recognizing the executables. There may be a path issue that needs corrected.



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

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

Mail Settings

Please enter your e-mail address (for where OpenCATS e-mails should be replied to, etc.).

E-mail: *

OpenCATS sends automatic E-Mails on different events. Please choose the mechanism for E-Mail delivery via OpenCATS.

Mail Support: *

SMTP Host: *

SMTP Port: *

SMTP Username: *

SMTP Password: *

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...

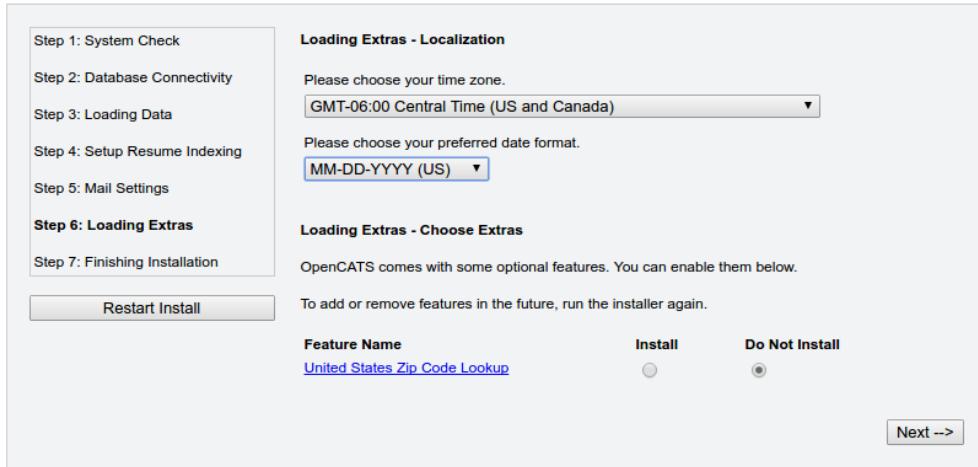
Choose the date format you like best

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

Click next

OpenCATS

Applicant Tracking System

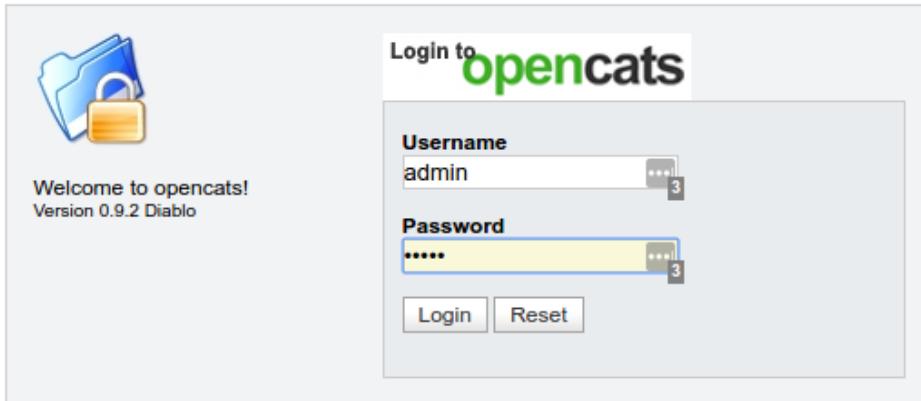


Step 7 Finishing installation

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.



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

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Based upon original work and Powered by [CATS](#).

Success!!

Your brand new OpenCATS applicant System!

opencats
open. online. free.

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

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 Hiring Overview

Name Company Recruiter Date

NO DATA

Hiring Overview

Weekly
Monthly
Yearly

Submissions Interviews Hires

0 1
04/25 - 05/01 05/02 - 05/08 05/09 - 05/15 05/16 - 05/22

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

First Name Last Name Status Position Company Modified ▲

NO DATA

The screenshot shows the OpenCATS 0.9.3 dashboard. At the top, there's a navigation bar with links for Dashboard, Activities, Job Orders, Candidates, Companies, Contacts, Lists, Calendar, Reports, and Settings. A quick search bar is also present. Below the navigation, there are three main sections: 'Recent Hires' (empty), 'Hiring Overview' (empty bar chart), and 'Important Candidates' (empty list). All these sections display the text 'NO DATA'.

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

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

Install-CentOS 7

These instructions are for LAMP (Linux Apache MySQL/MariaDB Php) environment only. Instructions are provided for CentOS7.

11.1 Installation-Unix/Linux Prerequisites

We will install LAMP server software and get it running. Then install the OpenCATS ATS.

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

11.2 CentOS7-Installing MySQL 5/Mariadb

- \$ sudo yum check-update
- \$ sudo yum -y install mariadb-server mariadb
- \$ sudo systemctl start mariadb.service
- \$ sudo systemctl enable mariadb.service
- \$ sudo mysql_secure_installation

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

11.3 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!

11.4 CentOS7-Installing Apache2

- \$ sudo yum install httpd
- \$ sudo systemctl start httpd.service
- \$ sudo systemctl enable httpd.service

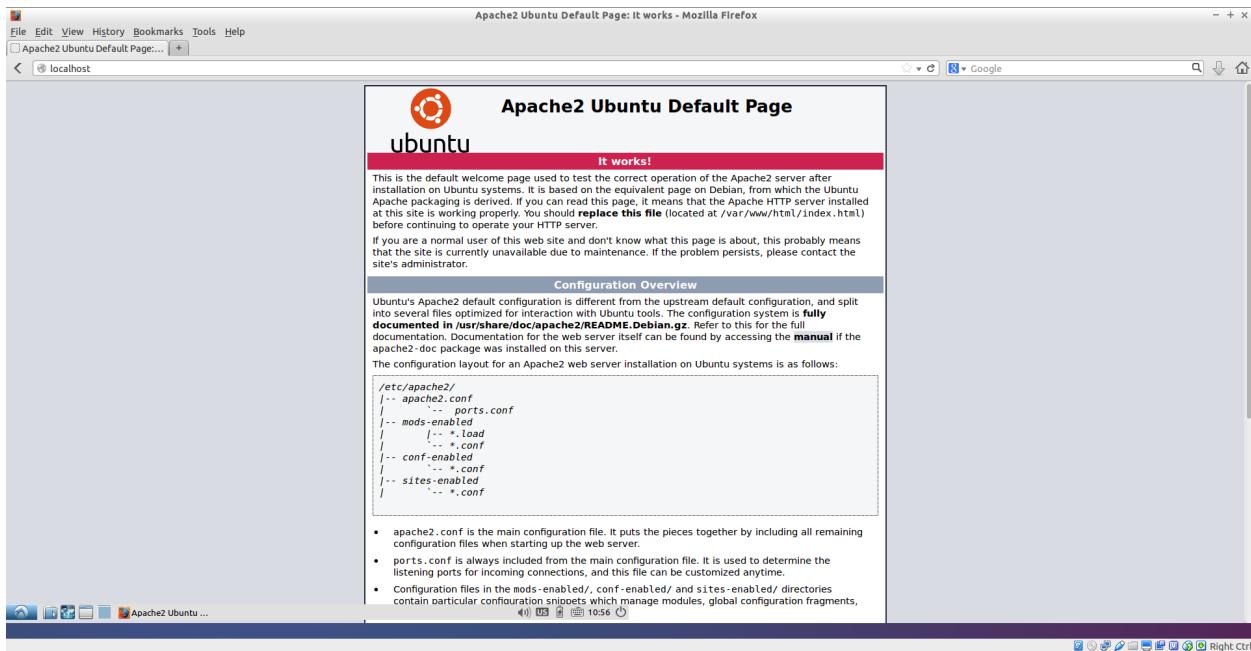
Note: CentOS 7.0 uses Firewall-cmd, so we will customize it to allow external access to port 80 (http) and 443 (https).

- \$ sudo firewall-cmd --permanent --zone=public --add-service=http
- \$ sudo firewall-cmd --permanent --zone=public --add-service=https
- \$ sudo firewall-cmd --reload

11.5 Check for success-Apache

Note: In this tutorial, we use localhost. These settings might differ for you, so you have to replace them where appropriate.

- Now direct your browser to localhost in the address bar, and you should see the Apache2 placeholder page (it may look different than this image):



11.6 CentOS7-Installing PHP5

Note: the default php version in CentOS 7 is php 5.4, which is too low for everything we need. We'll have to install php5.6 instead.

- \$ sudo rpm -Uvh <https://dl.fedoraproject.org/pub/epel/epel-release-latest-7.noarch.rpm>
- \$ sudo rpm -Uvh <https://mirror.webtatic.com/yum/el7/webtatic-release.rpm>
- \$ sudo yum install php56w php56w-soap php56w-ldap php56w-gd php56w-mysql
- \$ sudo systemctl restart httpd.service

11.7 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.

- \$ sudo nano /var/www/html/info.php
- Type or paste the following into it and save as info.php:

```
1 <?php
2  phpinfo();
3 ?>
```

- CTL-O then Enter to save
- CTL-X to exit nano

- (CentOS) \$ sudo systemctl restart httpd.service
- In your browser, go to localhost/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.

11.8 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 few 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 'opencats' '@'localhost' IDENTIFIED BY 'databasepassword';
- mysql> CREATE DATABASE opencats;
- mysql> GRANT ALL PRIVILEGES ON 'opencats'.* TO 'opencats' '@'localhost' IDENTIFIED BY 'databasepassword';

- mysql> exit;

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

11.9 Run composer to get dependencies

- \$ sudo yum install git
- \$ sudo yum install composer
- \$ cd /var/www/html
- \$ sudo wget https://github.com/opencats/OpenCATS/archive/0.9.3-3.tar.gz
- \$ sudo tar -xvzf 0.9.3-3.tar.gz
- \$ cd OpenCATS-0.9.3-3
- \$ sudo composer install

Note: If everything is done correctly, there should be no composer errors. If there are errors, take a close look at them to see what is missing.

11.10 Server and Directory permissions

Note: CentOS runs SELinux for additional security layers. We need to do a few additional things on permissions.

- \$ cd .. Move back into the main html directory
- \$ sudo chown apache:apache -R OpenCATS-0.9.3-3
- \$ cd OpenCATS-0.9.3-3 move back into the OpenCATS Directory
- \$ sudo find . -type f -exec chmod 0644 {} \;
- \$ sudo find . -type d -exec chmod 0770 {} \;
- \$ sudo chcon -t httpd_sys_content_t /var/www/html/OpenCATS-0.9.3-3 -R
- \$ sudo chcon -t httpd_sys_rw_content_t /var/www/html/OpenCATS-0.9.3-3 -R

Warning: make sure this is set to **EXACTLY** the name of your OpenCATS directory, default for OpenCATS version 0.9.3-3 would be OpenCATS-0.9.3-3

11.11 Install resume indexing tools

- \$ sudo wget ftp://ftp.pbone.net/mirror/ftp5.gwdg.de/pub/opensuse/repositories/home:/Kee
- \$ sudo rpm -ivh antiword-0.37-20.1.x86_64.rpm
- \$ sudo wget http://dl.fedoraproject.org/pub/epel/7/x86_64/h/html2text-1.3.2a-14.el7.x8

- \$ sudo rpm -ivh html2text-1.3.2a-14.el7.x86_64.rpm
- \$ sudo yum install poppler poppler-utils unrtf

If you want to remove the files after you have installed them then do: * \$ sudo rm antiword-0.37-20.1.x86_64.rpm html2text-1.3.2a-14.el7.x86_64.rpm

11.12 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 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](#)

Welcome to OpenCATS!

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 5.5.9-1ubuntu4.20.
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.
PHP LDAP library extension (ldap) is loaded.
PHP SOAP extension (soap) is loaded.
PHP zip extension is loaded.
Directory ./attachments/ is readable (permissions: 0770).
Directory ./attachments/ is writeable (permissions: 0770).
Creating a file within ./attachments/ succeeded.
Directories can be created inside ./attachments/.
Configuration file ./config.php is writable.
Creating a file within ./ succeeded.

All tests passed successfully!
```

[Next ->](#)

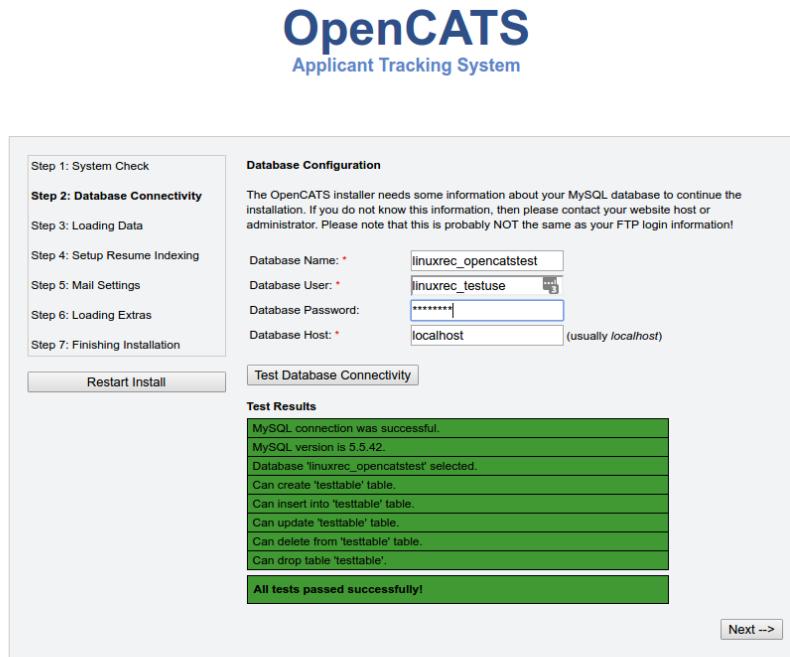
Step 2: Database connectivity

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.



Step 3: Loading Data

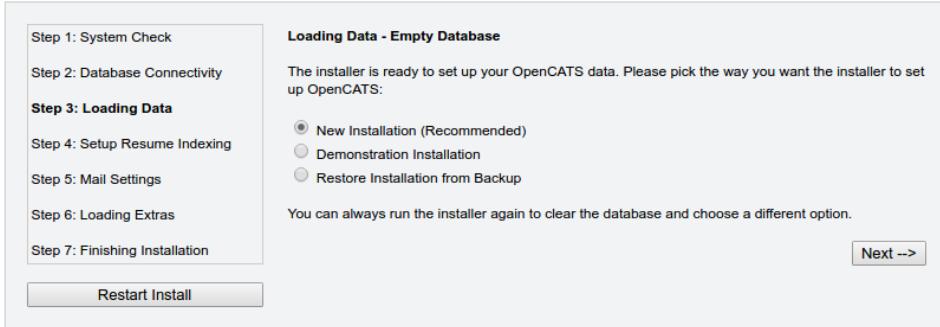
For a new installation, select New Installation, then next

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



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

The screenshot shows the 'Step 4: Setup Resume Indexing' configuration page. On the left, a sidebar lists steps from 1 to 7. Step 4 is selected. A 'Restart Install' button is at the bottom of the sidebar.

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 lpath\to\antiword does not exist.
Pdftotext binary lpath\to\pdftotext does not exist.
Html2Text binary lpath\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

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

Mail Settings

Please enter your e-mail address (for where OpenCATS e-mails should be replied to, etc.).

E-mail: *

OpenCATS sends automatic E-Mails on different events. Please choose the mechanism for E-Mail delivery via OpenCATS.

Mail Support: *

SMTP Host: *

SMTP Port: *

SMTP Username: *

SMTP Password: *

Next -->

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...

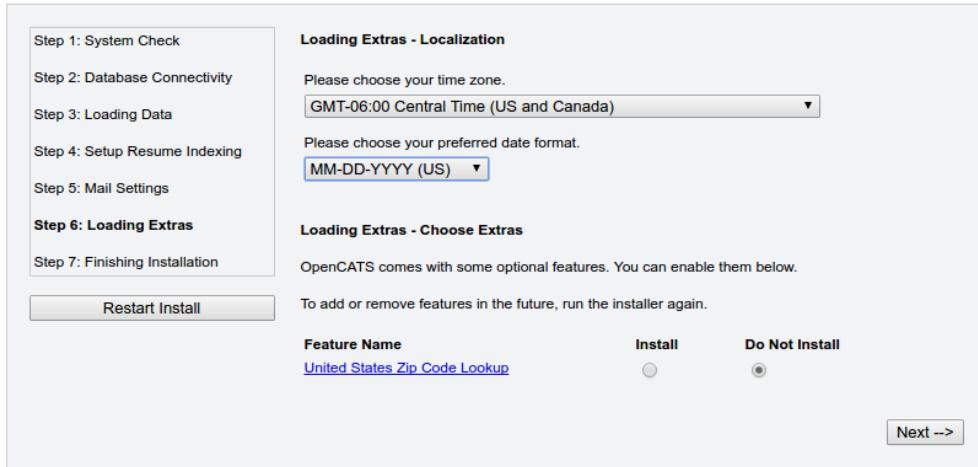
Choose the date format you like best

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

Click next

OpenCATS

Applicant Tracking System

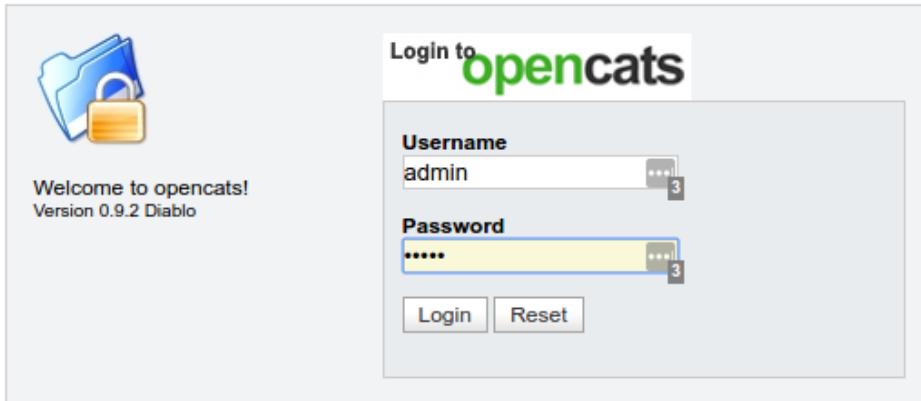


Step 7 Finishing installation

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.



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Based upon original work and Powered by [CATS](#).

Success!!

Your brand new OpenCATS applicant System!

opencats
open. online. free.

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

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 Hiring Overview

Name Company Recruiter Date

NO DATA

Hiring Overview

Weekly
Monthly
Yearly

Submissions Interviews Hires

0 1
04/25 - 05/01 05/02 - 05/08 05/09 - 05/15 05/16 - 05/22

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

First Name Last Name Status Position Company Modified ▲

NO DATA

The screenshot shows the OpenCATS application interface. At the top, there's a navigation bar with links for Dashboard, Activities, Job Orders, Candidates, Companies, Contacts, Lists, Calendar, Reports, and Settings. A quick search bar is also present. Below the navigation, there are three main sections: 'Recent Hires' (empty), 'Hiring Overview' (empty bar chart), and 'Important Candidates' (empty list). All these sections display the text 'NO DATA'.

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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.

12.1 OpenCATS dashboard/home screen

The screenshot shows the OpenCATS dashboard with several sections highlighted by red arrows:

- OpenCATS Module Tabs:** Located at the top right, showing Dashboard, Activities, Job Orders, Candidates, Companies, Contacts, Lists, Calendar, Reports, and Settings. The 'Dashboard' tab is selected.
- Recent Activities:** A grid showing recent interactions: 'Recent: John Smith | Bert van Oostveen | test list | Educula Rey | Johnny Alpha'.
- Recent Calls:** A list of recent calls: 09-06-16 12:10 AM: Bert van Oostveen, 08-04-16 09:10 PM: Bert van Oostveen, 08-04-16 09:51 AM: Bugs Bunny, 08-12-17 04:11 PM: Johnny Alpha, 08-12-17 01:39 PM: philippe pachwasdd, 08-11-17 01:00 AM: Johnny Alpha.
- Upcoming Calls:** A list of upcoming calls: 12-10-16 08:00 AM: Test call to Bert.
- Upcoming Events:** A list of upcoming events: 14-10-16 09:00 AM: Meeting with Major client.
- Recent Hires:** A list of recent hires: Name, Company, Recruiter, Date.
- Hiring Overview:** A bar chart showing hiring statistics for 2013, 2014, 2015, and 2016 across three categories: Submissions, Interviews, and Hires. The chart is color-coded (blue for Submissions, orange for Interviews, green for Hires).
- Important Candidates:** A grid of candidates with columns: First Name, Last Name, Status, Position, Company, and Modified.

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.

12.2 Activities Screen

The screenshot shows the OpenCATS Activities screen. At the top, there is a navigation bar with links for Dashboard, Activities, Job Orders, Candidates, Companies, Contacts, Lists, Calendar, Reports, and Settings. Below the navigation bar, a message area says "Recent: Bert van Oostveen | John Smith | Factory Assistant | test list | Educula Rey". There is also a "Logout" link and a user information line "John Brown <demo> (testdomain.com)".

The main content area is a table titled "Activities". The table has columns: Date, First Name, Last Name, Regarding, Activity, Notes, and Entered By. The "Date" column is currently sorted by date. The "Entered By" column is highlighted with a red border. The "Notes" column contains several status changes like "Placed", "Contacted", and "no kill number 5!". The "Entered By" column consistently shows "John B." across all rows.

Date	First Name	Last Name	Regarding	Activity	Notes	Entered By
09-06-18 (12:10 AM)	Bert	van Oostveen	General	Call	test test test	John B.
08-05-18 (09:10 PM)	Bert	van Oostveen	General	Other	Added candidate to pipeline.	John B.
08-04-18 (03:51 AM)	Bugs	Bunny	Test (Internal Postings)	Call (Talked)	Status change: Placed	John B.
08-12-17 (04:11 PM)	johnny	Alpha	dfsdfsd (Internal Postings)	Call (Missed)	Status change: Contacted	John B.
08-12-17 (01:39 PM)	philippe	pachwasdd	test (Internal Postings)	Call	Status change: Contacted	John B.
08-11-17 (01:00 AM)	johnny	Alpha	dfsdfsd (Internal Postings)	Other	Added candidate to pipeline.	John B.
08-10-17 (09:25 PM)	johnny	Alpha	General	Call	no kill number 5!	John B.
09-08-17 (08:50 AM)	Candidate B	Lastname B	Position A (Team A)	Other	Added candidate to pipeline.	John B.
09-12-16 (12:53 PM)	Allen	Yan	JAVA Developer (ABC S. A.)	Other	Update CV sent to customer	John B.
10-10-16 (01:48 PM)	johnny	Alpha	Scrum master (ABC S. A.)	Call	asdasdf	John B.
10-10-16 (09:22 AM)	Robert	West	Head of R&D (aa com)	Other	Added candidate to pipeline.	John B.
07-10-16 (04:17 PM)	nguyen	a	Embarqué (Internal Postings)	Other	Added candidate to pipeline.	John B.
07-10-16 (01:49 PM)	Pirla	Cogilone	Head of R&D (aa com)	Other	Added candidate to pipeline.	John B.
06-10-16 (08:44 PM)	John	Smith	Factory Assistant (Team A)	Other	Added candidate to pipeline.	John B.
05-10-16 (03:31 PM)	nguyen	a	ASP.Net (Internal Postings)	Other	Added candidate to pipeline.	John B.

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.

12.3 Job Orders Screen

The screenshot shows the OpenCATS Job Orders screen. At the top, there's a navigation bar with links for Dashboard, Activities, Job Orders, Candidates, Companies, Contacts, Lists, Calendar, Reports, and Settings. Below the navigation is a search bar with fields for 'Recent' (containing 'asdf', 'Manager 1', 'Head of R&D', 'Embarqué', and 'nguyen a'), 'Add Job Order', and 'Search Job Orders'. To the right of the search bar are 'Logout' and 'John Brown <demo> (testdomain.com)'.

The main area is titled 'Job Orders: Home' and displays a grid of 32 items. The columns are labeled: ID, Title, Company, Type, Status, Created, Age, S, P, Recruiter, and Owner. A red box highlights the 'Active / On Hold / Full' dropdown in the top right corner of the grid header. Another red box highlights the 'Action' button at the bottom left of the grid.

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	adasdadad	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	drótkoszorus	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.

At the bottom of the grid, there are navigation links: < First, << Prev Page, 1 of 3, Next >>, Last >, and a series of letters from A to Z followed by '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.

	ID	Title
Show Columns:		
<input checked="" type="checkbox"/> Attachments		
<input checked="" type="checkbox"/>	ID	
<input type="checkbox"/>	Company Job ID	
<input checked="" type="checkbox"/>	Company	
<input type="checkbox"/>	Department	
<input checked="" type="checkbox"/>	Type	R&D
<input checked="" type="checkbox"/>	Status	
<input checked="" type="checkbox"/>	Age	
<input checked="" type="checkbox"/>	Created	ad
<input type="checkbox"/>	Modified	
<input type="checkbox"/>	Not Contacted	stior
<input checked="" type="checkbox"/>	Submitted	rús
<input checked="" type="checkbox"/>	Pipeline	
<input type="checkbox"/>	Interviews	
<input checked="" type="checkbox"/>	Owner	
<input checked="" type="checkbox"/>	Recruiter	
<input type="checkbox"/>	Contact	
<input type="checkbox"/>	Contact Phone	gine
<input type="checkbox"/>	City	b
<input type="checkbox"/>	State	
<input type="checkbox"/>	Max Rate	Eng
<input type="checkbox"/>	Salary	
<input type="checkbox"/>	Duration	
<input type="checkbox"/>	Openings	
<input type="checkbox"/>	Misc Notes	
<input type="checkbox"/>	Reset to Default Columns	

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.

12.4 Candidates Screen

The screenshot shows the Candidates screen in OpenCATS. At the top, there's a navigation bar with links for Dashboard, Activities, Job Orders, Candidates (which is the active tab), Companies, Contacts, Lists, Calendar, Reports, and Settings. A user session is shown at the top right: John Brown <demo> (testdomain.com). Below the navigation is a search bar with recent searches: johnny Alpha | CCE | Hinduja | Educula Rey | AAAAAAAA. There's also a quick search field and a 'Go' button. The main content area is titled 'Candidates: Home' and shows a grid of candidate records. The columns are: First Name, Last Name, E-Mail, State, Recent Status, Recent Status (Extended), City, Key Skills, Modified, and Available. The 'Recent Status (Extended)' column contains detailed status information like 'Internal Postings - AAAAAAAA'. The 'Key Skills' column lists skills such as 'forklift, quickbooks, selector' and 'Java SAP .NET'. The 'Modified' and 'Available' columns show dates like '11-10-16'. The 'Action' column at the bottom left has a red border. At the bottom of the grid, there are navigation links for first, previous, next, last, and letters A through Z, followed by an 'ALL' link.

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 | Edu



Candidates: Home

Candidates - Page 1 (43 Items)

First Name	Last Name
------------	-----------

Show Columns:

- [Attachments](#)
- [E-Mail](#)
- [2nd E-Mail](#)
- [Home Phone](#)
- [Cell Phone](#)
- [Work Phone](#)
- [Address](#)
- [City](#)
- [State](#)
- [Zip](#)
- [Misc Notes](#)
- [Web Site](#)
- [Key Skills](#)
- [Recent Status](#)
- [Recent Status \(Extended\)](#)
- [Source](#)
- [Available](#)
- [Current Employer](#)
- [Current Pay](#)
- [Desired Pay](#)
- [Can Relocate](#)
- [Owner](#)
- [Created](#)

- [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
<input type="button" value="Action"/> <div style="border: 1px solid #ccc; padding: 5px; margin-top: 5px;"> Add To List Selected All Add To Pipeline Selected All Send E-Mail Selected All Export Selected All </div>			

- **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.

12.5 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 'Companies: Home' page. At the top left, there is a 'Show Columns' dropdown menu with various options like 'Attachments', 'Jobs', 'Phone', etc., listed. A red box highlights this menu. Below the menu is a table with columns for Jobs, Name, City, State, Phone, Owner, Created, Modified, Web Site, Contact, and Misc Notes. The table contains 14 items. The last item, 'Internal Postings', is highlighted with a yellow background. At the bottom of the table, there is a 'Rows Per Page' dropdown and a 'Filter' link. The top right corner shows the user 'John Brown <demo> (testdomain.com)' and a 'Logout' link.

12.6 Contacts Screen

The contacts screen is the main screen for dealing with contacts internally, from client companies, or leads in the sales process. Contacts are people on the hiring side, not candidates looking for work.

The screenshot shows the 'Contacts: Home' page. At the top left, there is a 'Show Columns' dropdown menu with various options like 'First Name', 'Last Name', 'Company', etc., listed. A red box highlights this menu. Below the menu is a table with columns for First Name, Last Name, Company, Title, Work Phone, Owner, Created, Modified, Cell Phone, and E-Mail. The table contains 7 items. The last item, 'Johnny', is highlighted with a yellow background. At the bottom of the table, there is a 'Rows Per Page' dropdown and a 'Filter' link. The top right corner shows the user 'John Brown <demo> (testdomain.com)' and a 'Logout' link.

This is similar to the other screens. There are no features here that have not been covered already. We will move along.

12.7 Lists Screen

Hot lists, Lead Lists, tear sheets, call lists. Whatever you call them, most recruiters have used them at some point. OpenCATS has them here.

The screenshot shows the 'Lists' screen in OpenCATS. At the top, there's a blue header bar with various navigation links like Dashboard, Activities, Job Orders, Candidates, Companies, Contacts, Lists, Calendar, Reports, and Settings. A red arrow points to the 'Show Lists' button in the top-left corner of the header. Below the header is a search bar with 'Recent' history and a 'Quick Search' field. The main content area is titled 'Lists: Home' and shows a table of 'Lists - Page 1 (4 Items)'. The table has columns for Count, Description, Data Type, List Type, Owner, Created, and Modified. The data includes:

Count	Description	Data Type	List Type	Owner	Created	Modified
2	test list	Candidate	Static	John B.	25-08-16	30-09-16
2	tess	Job Order	Static	John B.	04-10-16	11-10-16
2	sdfsdssdfsdfsdf	Job Order	Static	John B.	13-09-16	04-10-16
2	aaa	Job Order	Static	John B.	14-10-16	14-10-16

At the bottom right of the table, there's a grid of letters from A to Z with 'ALL' at the end. The entire screenshot is framed by a light gray border.

The only new clickable button on the Lists screen is the Show Lists button in the upper right corner of the blue bar.

12.8 Calendar Screen

The Calendar is a central hub for your OpenCATS usage. Every phone call and event, if scheduled through OpenCATS will appear here. The default Calendar screen will show a list of upcoming events in the left column and a Calendar overview on the right.

The screenshot shows the 'Calendar' screen for October 2016. At the top, there's a blue header bar with links for Dashboard, Activities, Job Orders, Candidates, Companies, Contacts, Lists, Calendar, Reports, and Settings. A red box highlights the 'My Upcoming Events' link in the header. Below the header is a search bar with 'Recent' history. The main content area is titled 'Calendar: October 2016' and shows a monthly grid. The grid has columns for Monday through Sunday. Red boxes highlight specific events: one on October 4th (01:00 AM) and another on October 14th (09:00 AM). Red arrows point to other events on October 10th (Meeting with Jose - John Brown), October 12th (Test call to Bert - John Brown), and October 14th (Meeting with Major client - John Brown). The entire screenshot is framed by a light gray border.

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- My Upcoming Events: Shows all upcoming, scheduled events in the left column.

- **Add Event**: Add a new event to your calendar
- **Goto Today**: Shows you todays events
- Calendar date views can be changed by clicking: Day, Week, or Month.
- The Green Arrows can be clicked to move you back or forward on the Calendar.

Every Event box within the calendar is clickable for event information, which will appear in the left column.

Red Arrows:

- The first arrow points to a clickable icon that opens up the record of the Candidate included in the scheduled event.
- The middle red arrow points to an icon that indicates this is a “Public” event, which means it is viewable by any OpenCATS user.
- The third red arrow points to a clickable icon that opens up the record of the Contact included in the scheduled event.
- Lastly, every date number on the Calendar can be clicked on to view that date’s scheduled events.

Note: At this time, the OpenCATS calendar does not sync with outside calendars (Outlook, Google Calendar, etc.). However, that functionality CAN be added if you know a little coding, or a developer willing to do it.

12.9 Reports Screen

There are a few reporting options in OpenCATS. The Reports screen provides reports on New Submissions and New Placements for a specified time period.

The screenshot shows the OpenCATS Reports interface. At the top, there's a navigation bar with links for Dashboard, Activities, Job Orders, Candidates, Companies, Contacts, Lists, Calendar, Reports, and Settings. Below the navigation bar, a blue header bar displays recent activity: "Recent: Business Development.. | pm | vvvvvvvv lllll.. | tesst | asdasdadad". The main content area is titled "Reports" and contains several tables showing statistics for different time periods:

- Today:**

New Job Orders	2
New Candidates	0
New Companies	1
New Submissions	0
New Placements	0
New Contacts	0
- Yesterday:**

New Job Orders	3
New Candidates	0
New Companies	2
New Submissions	0
New Placements	0
New Contacts	0
- This Week:**

New Job Orders	5
New Candidates	0
New Companies	1
New Submissions	0
New Placements	0
New Contacts	0
- Last Week:**

New Job Orders	5
New Candidates	7
New Companies	2
New Submissions	5
New Placements	3
New Contacts	0
- This Month:**

New Job Orders	16
New Candidates	15
New Companies	6
New Submissions	7
New Placements	3
New Contacts	0
- Last Month:**

New Job Orders	20
New Candidates	22
New Companies	9
New Submissions	1
New Placements	2
New Contacts	6
- This Year:**

New Job Orders	41
New Candidates	49
New Companies	17
New Submissions	8
New Placements	7
New Contacts	7
- Last Year:**

New Job Orders	0
New Candidates	0
New Companies	0
New Submissions	0
New Placements	0
New Contacts	0
- To Date:**

Total Companies	18
Total Candidates	49
Total Job Orders	41
Total Submissions	8
New Placements	7
Total Contacts	7

Unfortunately the other options on the screen weren't built into the system and will (hopefully) be added in with time. There are additional reporting features within OpenCATS that will be explored later.

12.10 Settings Screen

There isn't much to the settings screen.

The screenshot shows the OpenCATS application interface. At the top, there is a navigation bar with several tabs: Dashboard, Activities, Job Orders, Candidates, Companies, Contacts, Lists, Calendar, Reports, and Settings. The 'Administration' tab is highlighted with a red box. Below the navigation bar, there is a blue header bar with links for Recent, My Profile, and Downloads. The main content area is titled 'Settings: My Profile' and has a sub-section titled 'Profile'. Under 'Profile', there are two items: 'View Profile' and 'Change Password'. A tooltip for 'View Profile' says 'View your current profile to verify your information is correct.' and a tooltip for 'Change Password' says 'Change your CATS login password.'

In the upper left corner:

- Administration If you are the OpenCATS system administrator, this will take you to the administration screen.
- My Profile View your OpenCATS user profile or change your password.
- Downloads For now, this page serves no purpose. Disregard it completely.

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

The screenshot shows the OpenCATS dashboard with the following sections:

- Recent Hires:** A table with columns Name, Company, Recruiter, and Date. It displays "NO DATA".
- Hiring Overview:** A bar chart showing hiring activity from 04/25 - 05/01 to 05/16 - 05/22. The chart is labeled "NO DATA".
- Important Candidates:** A table with columns First Name, Last Name, Status, Position, Company, and Modified. It displays "NO DATA".

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13.1 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.

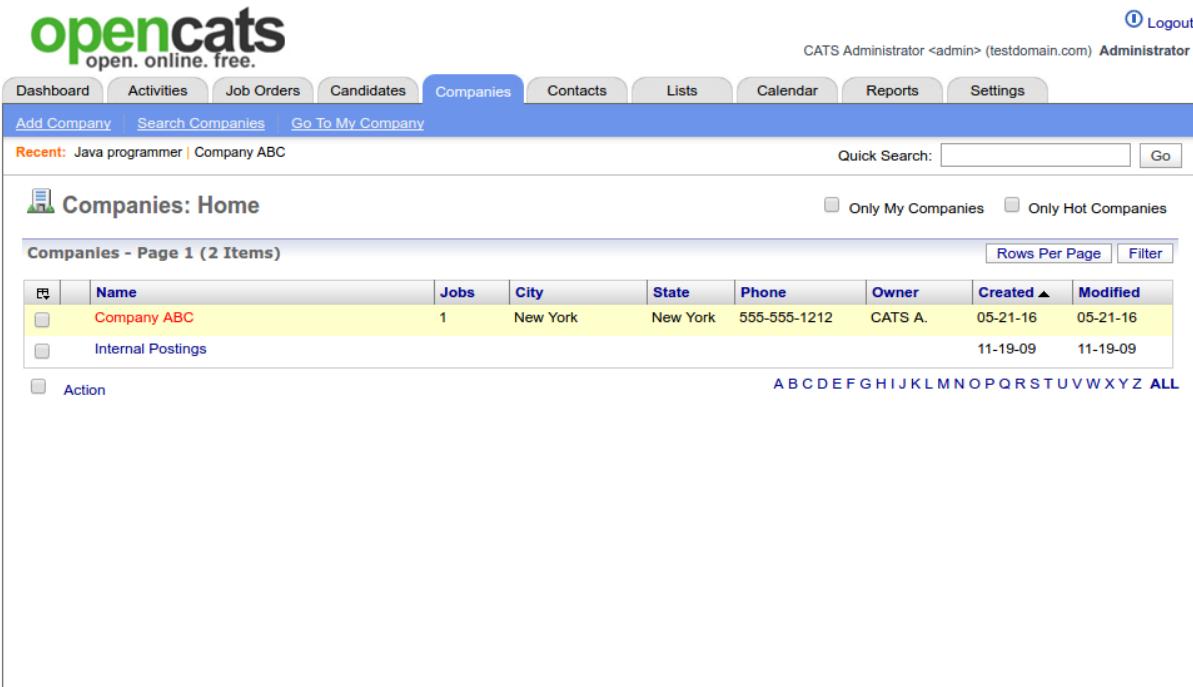
Settings: Options to customize your account and CATS features are available in this module. Users change your Profile, Password. Administrators access your account, change your Career Portal and E-mail configurations, and customize your dashboard, import and backup data.

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

13.2 Add a new Company

Click on Companies

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



The screenshot shows the 'Companies: Home' page of the OpenCATS system. At the top, there is a navigation bar with links for Dashboard, Activities, Job Orders, Candidates, Companies (which is the active tab), Contacts, Lists, Calendar, Reports, and Settings. Below the navigation bar, there are links for 'Add Company', 'Search Companies', and 'Go To My Company'. A 'Recent' link for 'Java programmer | Company ABC' is also present. On the right side of the header, there is a 'Logout' link and the administrator information 'CATS Administrator <admin> (testdomain.com) Administrator'. A 'Quick Search' input field and a 'Go' button are located on the right. The main content area has a title 'Companies - Page 1 (2 Items)' and a table with two rows. The table columns are: Action, Name, Jobs, City, State, Phone, Owner, Created, and Modified. The first row shows 'Company ABC' with 1 job, located in New York, New York, phone 555-555-1212, owner CATS A., created on 05-21-16, and modified on 05-21-16. The second row shows 'Internal Postings' with no jobs listed. There are checkboxes for 'Only My Companies' and 'Only Hot Companies'. Below the table, there are links for 'Rows Per Page' and 'Filter', and a navigation bar with letters A through Z and an 'ALL' link.

Action	Name	Jobs	City	State	Phone	Owner	Created	Modified
<input type="checkbox"/>	Company ABC	1	New York	New York	555-555-1212	CATS A.	05-21-16	05-21-16
<input type="checkbox"/>	Internal Postings						11-19-09	11-19-09

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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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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.

The screenshot shows the 'Companies: Add Company' form. On the right side of the 'Address' input field, there is a small button with a double-left arrow icon. A red arrow points from this button to a tooltip window. The tooltip contains the following information:

```

Cut and paste freeform address here.

Bob's Company
1234 Nowhere Lane
Philadelphia, PA 12345
web site: www.bobscompany.com
Phone: 555-555-1215
Fax: 555-555-1212
  
```

The rest of the form includes fields for Company Name, Primary Phone, Secondary Phone, Fax Number, Address, City, State, Postal Code, Web Site, Departments (set to 'No Departments'), and Hot Company. Below the form are buttons for 'Add Company', 'Reset', and '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 on.

This is what you should see.

Click Add Company

Companies: Add Company

Basic Information

Company Name:	Bob's Company	<input type="button" value="..."/>
Primary Phone:	555-555-1215	
Secondary Phone:	<input type="text"/>	
Fax Number:	555-555-1212	<input type="button" value="<--"/>
Address:	1234 Nowhere Lane	
City:	Philadelphia	
State:	PA	
Postal Code:	12345	<input type="button" value="Lookup"/>
Web Site:	www.bobscompany.com	
Departments:	No Departments	
Hot Company:	<input type="checkbox"/>	

Cut and paste freeform address here.

Bob's Company
 1234 Nowhere Lane
 Philadelphia, PA 12345
 www.bobscompany.com
 Phone: 555-555-1215
 Fax: 555-555-1212

Other

Key Technologies:	Java, python, windows
Misc. Notes:	Makes doors and windows for Bob and his friends

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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.

The screenshot shows the OpenCATS application interface. At the top, there is a navigation bar with links for Dashboard, Activities, Job Orders, Candidates, Companies (which is the active tab), Contacts, Lists, Calendar, Reports, and Settings. On the far right of the top bar are 'Logout' and 'Administrator' status indicators.

Below the navigation bar, there is a blue header bar with links for Add Company, Search Companies, and Go To My Company. A 'Recent' section displays 'Bob's Company | Java programmer | Company ABC'. A 'Quick Search' input field and a 'Go' button are also present.

The main content area has a title 'Companies: Company Details' with a small icon. Below it is a 'Company Details' section containing form fields for Name, Primary Phone, Secondary Phone, Fax Number, Address, Billing Contact, Web Site, Key Technologies, Created, and Owner. The 'Address' field includes a small map icon.

Under the 'Attachments:' section, there is a link 'Add Attachment' with a red arrow pointing to it. Below that is a 'Misc. Notes:' field containing the text 'Makes doors and windows for Bob and his friends'.

At the bottom of the main content area are three buttons: 'Edit', 'Delete', and 'View History'.

Below the main content area are three sections: 'Job Orders' (with a table header and a 'Add Job Order' link), 'Contacts' (with a table header and a 'Add Contact' link), and a footer section.

The footer section contains the text 'CATS Version 0.9.2 Diablo. Powered by CATS.', 'Server Response Time: 0.04 seconds.', and '© 2005 - 2007 Cognizo Technologies, Inc.'

13.3 Add a new Contact

Next let's add a Company Contact.

Click Add Contact at the bottom of the current screen.

The screenshot shows the 'Companies: Company Details' page in OpenCATS. At the top, there's a navigation bar with links like Dashboard, Activities, Job Orders, Candidates, Companies (which is selected), Contacts, Lists, Calendar, Reports, and Settings. Below the navigation is a blue header bar with buttons for Add Company, Search Companies, and Go To My Company. A recent search bar shows 'Recent: Bob's Company | Java programmer | Company ABC'. A quick search bar and a 'Go' button are also present.

The main content area has a title 'Companies: Company Details' with a small icon. It contains a 'Company Details' section with fields for Name (Bob's Company), Primary Phone (555-555-1215), Secondary Phone (555-555-1212), Fax Number (555-555-1212), Address (1234 Nowhere Lane, Philadelphia, PA 12345), Billing Contact, Web Site (http://www.bobscompany.com/), Key Technologies (Java, python, windows), Created (05-24-16 (06:37 AM) (CATS Administrator)), and Owner (CATS Administrator). There's also an 'Attachments' section with an 'Add Attachment' link and a 'Misc. Notes' section stating 'Makes doors and windows for Bob and his friends'.

Below these sections are three buttons: Edit, Delete, and View History. The 'Job Orders' section follows, featuring a table with columns ID, Title, Type, Status, Created, Modified, Start, Age, S, P, Recruiter, Owner, and Action. A 'Contacts' section is shown next, with a table having columns First Name, Last Name, Title, Department, Work Phone, Cell Phone, Created, Owner, and Action. An 'Add Contact' button is visible at the bottom of this section, with a red arrow pointing to it.

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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.

The screenshot shows the OpenCATS application interface. At the top, there is a navigation bar with links for Dashboard, Activities, Job Orders, Candidates, Companies, Contacts, Lists, Calendar, Reports, and Settings. The 'Companies' link is highlighted. On the right side of the header, there is a 'Logout' link and the text 'CATS Administrator <admin> (testdomain.com) Administrator'. Below the header, there is a blue navigation bar with links for 'Add Company', 'Search Companies', and 'Go To My Company'. The main content area has a title 'Companies: Company Details' with a sub-section 'Company Details'. This section contains a table with company information: Name (Bob's Company), Primary Phone (555-555-1215), Secondary Phone (555-555-1212), Fax Number (555-555-1212), Address (1234 Nowhere Lane, Philadelphia, PA 12345), Billing Contact, Web Site (http://www.bobscompany.com/), Key Technologies (Java, python, windows), Created (05-24-16 06:37 AM), and Owner (CATS Administrator). Below this table, there are sections for 'Attachments' (with a link to 'Add Attachment') and 'Misc. Notes' (with the note 'Makes doors and windows for Bob and his friends'). At the bottom of this section are buttons for 'Edit', 'Delete', and 'View History'. Below this, there are sections for 'Job Orders' (with a table header for ID, Title, Type, Status, Created, Modified, Start, Age, S, P, Recruiter, Owner, Action, and a link to 'Add Job Order') and 'Contacts' (with a table header for First Name, Last Name, Title, Department, Work Phone, Cell Phone, Created, Owner, and Action, showing a row for Bob Browning as CEO). A red arrow points from the 'Bob' entry in the Contacts table back to the 'Bob' entry in the Company Details table.

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

Dashboard Activities Job Orders Candidates Companies Contacts Lists Calendar Reports Settings

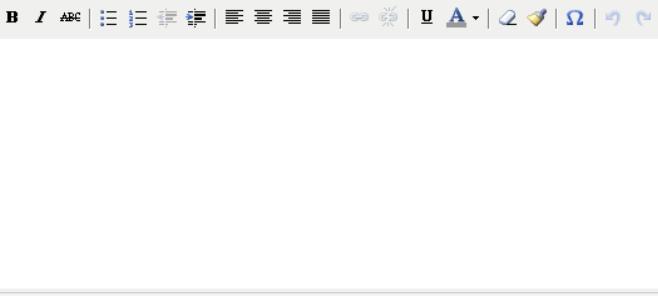
Add Job Order Search Job Orders

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

Job Orders: Add Job Order

Add a new job order to the system.

Title:	<input type="text"/>	Start Date:	<input type="button" 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="button" 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:


Add Job Order Reset Back to Job Orders

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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 let’s 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 'Job Orders: Add Job Order' page. The top navigation bar includes links for Dashboard, Activities, Job Orders (which is selected), Candidates, Companies, Contacts, Lists, Calendar, Reports, and Settings. A 'Logout' link is also present. The main content area has tabs for 'Add Job Order' and 'Search Job Orders'. A 'Recent' list shows 'Bob's Company | Java programmer | Company ABC'. A 'Quick Search' field with a 'Go' button is also present. The 'Job Orders: Add Job Order' section contains the following fields:

Title:	<input type="text"/>	Start Date:	<input type="button" 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="button" 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"/>

The 'Description' section contains a rich text editor toolbar. The 'Internal Notes' section also contains a rich text editor toolbar and a note: 'Everything BUT this box will be visible on your public job board (If you decide to activate it)'.

At the bottom are buttons for 'Add Job Order', 'Reset', and 'Back to Job Orders'.

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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:

Job Orders: Job Order Details

Job Order Details

Title:	IT Administrator	Duration:	Direct Hire
Company Name:	Bob's Company	Openings:	1
Department:	2	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	Qualifying	Submitted	Interviewing	Offered	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"/>	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.

13.5 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.

The screenshot shows the 'Job Orders: Job Order Details' page. At the top, there's a navigation bar with links like Dashboard, Activities, Job Orders, Candidates, Companies, Contacts, Lists, Calendar, Reports, and Settings. Below the navigation is a search bar with 'Recent' dropdown and 'Quick Search' fields. The main content area has tabs for 'Job Order Details' and 'Candidate Pipeline'. Under 'Job Order Details', there are sections for basic job info (Title: IT Administrator, Company Name: Bob's Company, etc.) and attachments (a PDF titled 'IT Administrator' with details about the position). There's also a 'Job Order Pipeline' section with a table showing stages: Total Pipeline, Contacted, Cend Replied, Qualifying, Submitted, Interviewing, Offered, Declined, and Placed. At the bottom of this section is a red arrow pointing to the 'Add Candidate to This Job Order Pipeline' button. Other buttons at the bottom include Edit, Delete, Admin Hide, Generate Report, and View History.

Then Add Candidate.

The screenshot shows the OpenCATS Job Order Details page for a job titled "IT Administrator". The modal window "Add Candidate to This Job Order Pipeline" is open, containing a search bar and a button labeled "Add Candidate". A red arrow points from the "Add Candidate" button towards the bottom left corner of the modal window.

Job Order Details

- Title: IT Administrator
- Company Name: Bob's Company
- Department: 2
- CATS Job ID: 1
- Contact Name: Bob Browning
- Contact Phone: 555-555-1212 x 1
- Contact Email: bob@bobscompany.com
- Location: Philadelphia, PA
- Max Rate: 80000
- 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
- Internal Notes: Everything BUT this box will be visible on your public job board (if you decide to activate it)

Add Candidate to This Job Order Pipeline

Search for a candidate below, and then click on the candidate's first or last name to add the selected candidate to the job order pipeline.

Search by Full Name:

Add Candidate

Candidate Pipeline

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

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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.

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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:

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	End Replied	Qualifying	Submitted	Interviewing	Offered	Placed
1							

Edit Delete 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.

Export

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.

Indices and tables

- genindex
- modindex
- search