OpenCATS Documentation

Release 0.9.3

OpenCATS

May 13, 2020

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Gentle warning-read first

This documentation is coming along nicely, albeit slowly. If you have requests for anything that should be included in this documentation, please comment on our forums.

• OpenCATS Forums

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Gentle Warning

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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 0.9.4 "Countach".

See the changelog.MD file for details.

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?

For now, no. The original code will continue to be licensed under the CPL. The OpenCATS team is aggresively working towards moving away from the CPL to a full MPL release.

The OpenCATS code is a combination of MPL and CPL code as of this writing.

What CAN we change?

You can change OpenCATS use OpenCATS in whatever way you choose. HOWEVER the items noted in the CPL can not be changed until OpenCATS moves to a full MPL release. See the next question for details.

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.

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.

Authors and Contributors

OpenCATS would not exist were it not for Asim Baig, the original Cognizo developers, and RussH. The OpenCATS community, myself included, are grateful for this.

This is not a comprehensive list of people who have developed and contributed to CATS/OpenCATS over the years. If you have helped, and you are not listed, let us know and THANK YOU!

4.1 Original CATS/Cognizo developers and contributors listed

- Asim Baig
- Will Buckner
- Andrew Candals
- Paul Canfield
- Brian Hanson
- Austin Smith

4.2 OpenCATS Developers and contributors

- RussH
- Matias Lespiau
- Kixy25
- libregeek
- skrchnavy
- Bloafer
- cptr13

If anyone has been forgotten, please let us know! Opencatsdocs at gmail

Introduction and Overview

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), and contact history.
- Job orders details, associated contacts, and the candidate pipeline for each.
- Multiple recruiters, sites, career portals, and much more.

5.1 What is an Applicant tracking system (ATS)?

An Applicant tracking system, or ATS, is software designed specifically for Recruiting firms, and HR departments within organizations to organize and track everything within the recruiting process for their organizations.

5.2 How is it free and what is Open Source software?

Without getting too specific or technical on what is and is not open source, open source software is community developed software that is available to use for free, by anyone, at any time, in any way they choose to. It is truly "free" software. Furthermore, because of the open nature, if you want to dig into the code and customize it, you are allowed to. If you want to share your changes back with the community, you are allowed to (please do!).

There are a lot of different variances in p[en source software and they've been covered extensively online. If you want to really dig into, and understand the purpose, intentions, limitations of open source software, please read up on it.

The developers behind OpenCATS will never contact you to try to sell you anything. We are a community of people creating recruiting software for people who do recruiting. Pure and simple.

5.3 OpenCATS vs CATSOne vs "open source"

OpenCATS is a free, open-source ATS. This means that there are no charges or limitations 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, though we do have this documentation, some YouTube videos, support forums and a community that helps.

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 community.

The OpenCATS team and the CATSOne organization are not associated in any way. We will not push anyone into any paid service, any time, ever.

5.4 What can OpenCATS be used for?

If you have to fill jobs, even if it's only one or two jobs a year, OpenCATS can make your life a lot easier. It will work in small to enterprise sized environments. From one user to hundreds.

5.5 How does OpenCATS compare to other free software and paid Applicant Tracking Systems?

If you compare OpenCATS to free resources out there, there's nothing to compare. As far as I know, there are currently one open source applicant tracking system out there right now, which is an off-shoot of OpenCATS. The options as far as I can tell, are free tiers of paid applicant tracking systems that in my opinion don't provide enough functionality to be practical for daily usage for any but the smallest recruiting environments. The only accurate comparison of a free Applicant tracking system would be the folks out there who are doing their tracking on excel sheets and storing resumes on their hard drives.

If this is you....STOP IT! There is no reason to do that any more. OpenCATS solves your problems and is free.

When you start comparing OpenCATS against the paid applicant tracking systems out there, it's not such an easy decision. For example, even the lower priced applicant tracking systems generally are competitive or even far better than OpenCATS in terms of features. The higher priced, enterprise applicant tracking systems make OpenCATS (in it's current state) an afterthought.

So if you are willing to pay the monthly cost of even a cheaper applicant tracking system, and features that OpenCATS are lacking in are important enough, then a paid ATS may be a better option for you. The advantage in that scenario that OpenCATS still has however, is that OpenCATS is still free for multiple users. So, a low end applicant tracking system might bring value at \$50/month for a solo recruiter over a free OpenCATS system. But, what if you have ten users? Are those features worth the \$50/month per user price-tag (\$500/month total)? These are factors to consider.

Another aspect to OpenCATS that should be considered is data privacy and data security. With a self-hosted Open-CATS system, you are solely responsible for your data security. If you are managing that well, you won't fall victim to

the occasional hacks and data breaches you hear about on the news. Also, there is no chance of coming into the office one day to find that the company running your applicant tracking system has suddenly closed their doors overnight with no way to access your critical recruiting information. OpenCATS allows you to control the security of your data, and control of your recruiting information. There is tremendous value in that, if that is important to you.

While OpenCATS is a perfectly functional applicant tracking system. It does not compete with most modern paid applicant tracking systems feature for feature. Whether it is the right solutions for you and your company is up to you! Test it out and decide.

5.6 OpenCATS General Features

Try our demo!

What better way to dig in to the OpenCATS capabilities and feature than to dig into it for yourself?

OpenCATS Demo

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 an active community of people that are willing to help as much as possible though. Also, we are slowly adding to our documentation and YouTube channel.

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.

Web based or local: OpenCATS can be installed in a variety of environments. For the solo recruiter/single user, OpenCATS can be installed on your local computer, accessible only by you. OpenCATS can be installed on a local network, accessible by everyone within the office, with no limit on users, yet still protected and removed from the outside internet. OpenCATS can also be installed and accessible via the internet, through a public facing web server, A VPS, a shared-hosting environment, so multiple users from all over the world can access and use OpenCATS together. Keep in mind though, that because OpenCATS is open source software, security is your responsibility. Make sure the appropriate measures are taken for the setup that you choose.

Full recruiting life-cycle: OpenCATS provides the infrastructure for the entire recruiting life-cycle, regardless of the type of role that you are recruiting for, or the volume of openings that you are dealing with.

Note: OpenCATS can get cumbersome for very high-volume recruiting due to the current lack of bulk recruiting features. Importing and dealing with many candidates at once per role may be prohibitive in OpenCATS. You would need to gauge the effort against the results and decide if OpenCATS is the best solution for your situation.

OpenCATS will walk you through the process, including the sales cycle, from building targeted lead lists, making client calls, getting signed agreements and taking job orders. It will handle all of recruiting, from initial candidate intake, job posting and applications, through the interview, offer, acceptance and candidate start. OpenCATS was designed by recruiters, for recruiters and continues to be developed with recruiting as the sole focus.

Internal and external recruiting: OpenCATS has all the functionality for companies that need an Applicant Tracking system for their internal recruiting as well as recruiting companies that are recruiting for multiple, external clients.

For internal recruiting, all recruiting can be done by checking the "Internal posting" check-box on the job order. Departments can be created and customized within any organization, and contacts added for those departments. Open-CATS can be as thorough and specific as you need it to be. For recruiting firms with external clients, each client can be tracked individually, even if they have multiple locations, departments and hiring managers. The flexibility is there within OpenCATS to ensure accuracy throughout the recruiting process.

Company branding: OpenCATS can be branded for your organization, you can replace the OpenCATS logo with your company logo, and the public-facing job posting page and outgoing emails, can be changed to match the look of your company's website and emails.

Resume storage, contact storage, applicant tracking and notes: OpenCATS was built from the ground up for recruiting. It can handle hundreds of thousands of records and resumes with no issues. I am not sure what the upper limit is for how many records and resumes before OpenCATS starts to have issues, but I can comfortably say it would likely take an enterprise-environment for that to happen. For any small to mid-size company, there should be no issues on how much information your OpenCATS ATS can handle.

Skills based tagging: Initially, OpenCATS had resume parsing and resume search built in. Over time, that functionality has been lost. The development team is focused on implementing long term solutions that will allow parsing and keyword search in OpenCATS. In the meantime, skill tagging is included in OpenCATS, and serves as a very functional alternative to keyword searching.

Lists: OpenCATS can make lists for whatever you need. Lead lists for sales?Yes. Candidate hot-sheets? Yes. List by geographic location? Yes. Anything you may need a list for, sales or recruiting, you can generate in OpenCATS for quick access. Lists can also be conveniently be exported as a csv file for any external applications.

Calendar: OpenCATS has a rich and immersive calendar built in that provides a thorough and accurate overview of activities. If you use the calendar system, you will always know what is coming up, and be able to quickly find information from past scheduled events. Unfortunately, at this time, there is no integration with any external calendar systems. OpenCATS can not sync with anything outside of OpenCATS.

Website integration and job board: OpenCATS has a company job postings page built right in. All you have to do is turn it on and brand it however you want. All the "public" marked jobs in your OpenCATS system will show up on your jobs page, and candidates will be able to apply through your site. You can create questionnaires for candidates to answer prior to applying, to ensure only candidates that fit the requirements apply. The candidate would then be added to the pipeline of the job order, and the recruiter working the role would be notified of the new application for review. Lastly, your newly added openings can be automatically posted to certain job posting sites via a built in XML feed. This feature does not work with every job board out there, but it does work with some of the larger ones.

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 work-flow managed.

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

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: Your OpenCATS system can be backed up as often as you want, ensuring no loss of data, ever. There is an easy and intuitive GUI-driven backup/restore system. System administrators can also perform back-ups/restores through the MySQL database and file system if they prefer. Anyone can backup and restore OpenCATS, regardless of technical knowledge and ability.

User access levels: Currently there are different access levels for users in the OpenCATS system, which the administrator can set up and assign. These are focused on the ability to manipulate data within OpenCATS. The OpenCATS dev team are working on features that will allow administrators to limit access to the records within OpenCATS (example: a recruiter will only be able to see the candidates/clients that are assigned to them, if that's how you choose to set it up).

Built in Emailing: The email functionality within OpenCATS is substantial. Currently, OpenCATS can be used to send emails to candidates, clients, and contacts. It can also be used to notify of status changes and new applications, or anything you would like it to do. Templates can be set up and used and branding can be included.

Built in modification system: There are certain aspects of modifying OpenCATS that are built in and do not require any technical ability or coding. Fields can be added to the candidate, client, and contact pages quite easily. Any information you want included, or tracked, that isn't built in to OpenCATS can be added through the intuitive interface with a few clicks.

Windows - OpenCATS Installation Instructions

6.1 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.

6.2 Downloading software and preparing your system

- Download XAMPP
- Install XAMPP

Note: You may get Windows defender warnings for Apache and MYSQL. Just check the boxes that you want Windows to allow access to. Private network would be for your home or office network only, public network would be for anything else.

Windows Security Alert X				
Windows Defender Firewall has blocked some features of this app				
Windows Defender private networks.	r Firewall has blo	cked some features of Apache HTTP Server on all public and		
	Name:	Apache HTTP Server		
×.	Publisher:	Apache Software Foundation		
	Path:	C: \xampp \apache \bin \httpd.exe		
Allow Apache HTTP Server to communicate on these networks:				
Public networks, such as those in airports and coffee shops (not recommended because these networks often have little or no security)				
What are the risks of allowing an app through a firewall?				
Allow access Cancel				

- Download OpenCATS-0.9.4-3 . You can not install this yet.
- Go to the folder where the OpenCATS-0.9.4-3.zip file is located (usually the Downloads folder)
- RIGHT-CLICK on the OpenCATS-0.9.4-3.zip file
- Click Extract All
- Change the folder that the files will be extracted to, to the following: C:\xampp\htdocs\
- Click extract

6.3 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.

Recycle Bin _ 🗆 🗙 XAMPP Control Panel v3.2.2 🤌 Config Netstat Admin Config Logs Admin Config Logs Admin Corto Logs Shell 📴 Explorer 👳 Services FileZilla 😡 Help Start Admin Config Logs 📃 Quit 8 🚔 😂 🖿) 🖓 🌶 💷 🛄 🕼 🕼 🖸 F

Note: ONLY start the Apache and MySql services. You do NOT need any of the other services.

- Stop the apache service (lower right corner, right click XAMPP, stop apache)
- Start the apache service



6.4 OPTIONAL - Renaming your OpenCATS directory

The current default directory name for the OpenCATS files is OpenCATS-0.9.4-3. This will result in the web address in your browser being http://localhost/OpenCATS-0.9.4-3

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

- Simply navigate to C:\xampp\htdocs
- Right click on the OpenCATS directory
- Click rename
- Rename the directory whatever you want (example: ATS)

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

6.5 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

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Recent Favorites	General settings	Database server
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	j ∕ More settings	PHP extension: mysqli PHP version: 5.6.28
		phpMyAdmin
		Version information: 4.5.1, latest stable version: 4.6.5.2 Documentation
		Wiki Official Homopage Official Homopage Contribute Get support Elst of changes
	A newer version of phpMyAdmin is available and you should consider upgrading. The newest version is 4 6.5.2, released on 2016-12-05.	
	There's reveal of paperty within a showing the showing consider apgroung. The lifeted relation is \$0.0.2.1 (beesded of 2010-12-90).	
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	Console	
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- In the box labeled database name type opencats.
- Hit create

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	▲ Note: Enabling the database statistics here might cause heavy traffic between the web server and the MySQL server.	
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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

File Machine View Input De	rices Help					
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	Subsers having access to "ope	encats"				
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€_@ mysql	root 127.0.0.1 glob	al all privileges Yes 🛛 🐉 Edit privileges				
- opencats	🔲 root 💠 1 glob	al ALL PRIVILEGES Yes 🛛 🐉 Edit privileges				
performance_schema phpmyadmin	root localhost glob	al ALL PRIVILEGES Yes 🛛 🐉 Edit privileges				
E test	↑ Check all With select	dod: 🔲 Everat				
		ABO. MAY EXPORT				
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	1					Go to PC settings to activate Windows.
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🛋 🙆 🚞						▲ I** 10 40 9:41 AM 1/5/2017
						🗟 🥥 🗗 🖉 🖶 🗳 👘 🖬 🚱 🤤 Right Ctrl

- 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

ile Machine View Input De	ices Help	
🔿 🔁 http://localhost/phpmyadr		- 0 A *
	in/server_privileges.php?adduser=1&dbname=opencats&tr 🄎 🛪 🖉 localhost / 127.0.0.1 phpM ×	11 N
php <mark>MyAdmin</mark> ≙⊚©⊚ e	Databases 🔓 SQL 🐁 Status 🛋 User accounts 🛶 Export 🔜 Import 🥜 Settings 🞍 Replic	
ecent Favorites	Commune State Common State State Commune Trucker	
(in a constant) (in a constant	Add user account	
New ∟ information_schema		
mysql	Login Information	
performance_schema	Use name: Use text field: v opencats	
test	Host name: Local V localhost	
	Descent	
	Pessword. Use text field:	
	Re-type:	
	Authentication Divelo	
	Native MySQL authentication	
	Generate password: Generate	
	Database for user account	
	Database for user account	
	Create database with same name and grant all privileges.	
	Grant all privileges on wildcard name (username_%). Grant all privileges on database "opencats".	
	Grant an privileges on database opencats .	
	Global privileges Check all	
	Note: MySQL privilege names are expressed in English.	
	поле, ту оча, раттори писти или инфанизации или научнат.	Activate Windows
	Data Structure Administration Resource	limits Go to PC settings to activate Windows.
	Console	
- 🙆 🚞		- 🏲 智 🕕 🧐 44 AM 1/5/201
		📓 🛛 🗗 📁 🛄 🖬 🚳 🖸 Right

6.6 Install and run Composer

• Download and install- Composer

On the settings Check screen, it should read: C:\xampp\php.exe

记 Composer Setup	- 🗆 X
Settings Check We need to check your PHP and other settings.	
Choose the command-line PHP you want to use:	
C:\xampp\php.exe ~	Browse
< Back Next >	> Cancel

- In the windows search menu, type cmd the open a command prompt.
- Type (Or copy/paste) cd C:\xampp\htdocs\opencats
- Type composer install

Composer will install some things.

Note: If you get a composer install token error, just hit enter and it will continue without any issues.

Once composer is finished, close the command prompt and open your web broswer.

6.7 Set up OpenCATS

In your Web Browser, visit http://localhost/OpenCATS-0.9.4-3 (adjust if you renamed the OpenCATS 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

Http://localhost/openCATS-0.9.3-3/installwizard.php	の - C DenCATS - Installatio	on Wi ×	
		Applicant Tracking System	
	Step 1: System Check	Welcome to OpenCATS!	
	Step 2: Database Connectivity	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	
	Step 3: Loading Data Step 4: Setup Resume Indexing	support OpenCATS and is configured property.	
	Step 5: Mail Settings	Test Results PHP version is 5.6.28.	
	Step 6: Loading Extras	PHP Ini: magic_quotes_runtime is disabled. PHP ini: register_globals is disabled.	
	Step 7: Finishing Installation	PHP MySQL extension (mysql) is loaded. PHP Sessions extension (session) is loaded. PHP PCRE regular expressions extension (pcre) is loaded.	
	Restart Install	PHP CType string classification extension (ctype) is loaded. PHP GD image manipulation library extension (gd) is loaded.	
		PHP LDAP library extension (Idap) is not loaded. Check your settings in php ini.	
		OpenCATS will function without LDAP, but will not authenticate from a LDAP service	
		Under certain GNUULinux distributions, the PHP LDAP extension is a separate package.	
		Ubuntu/Debian: Run "apl-get install php5-ldap" and restart your webserver. FedoratCentOSRNEL: Run "onf install php-ldap" or "yum install php-ldap" and restart your webserver.	
		PHP SOAP extension (soap) is not loaded. Check vour settinos in nob ini.	
		OpenCATS will function without SOAP, but CATS Professional functionality will not be supported.	
		Under certain Linux / BSD distributions, the PHP SOAP extension is a separate package.	
		Ubuntu: Run "apt-get install php-soap" and restart your webserver.	
		Deblan: Run "apt-get Install php5-soap" and restart your webserver. FreeBSD: Install the php5-soap port, or configure SOAP support in the php- extensions port and restart your webserver.	Activate Windows
		PHP zip extension is loaded.	Go to PC settings to activate Windows
		Directory /attachments/ is readable (permissions: 0777). Directory /attachments/ is writeable (nermissions: 0777).	

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.



tep 1: System Check	Database Configuration		
Step 2: Database Connectivity	The OpenCATS installer needs some information about your MySQL database to continue the installation. If you do not know this information, then please contact your website host or administrator. Please note that this is probably NOT the same as your FTP login information!		
Step 3: Loading Data			
Step 4: Setup Resume Indexing	Database Name: *	cats_dev	
Step 5: Mail Settings	Database User: *	cats	
Step 6: Loading Extras	Database Password:	password	
Step 7: Finishing Installation	Database Host: *	localhost	(usually localhost)
Restart Install			
	Test Database Conr	nectivity	

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



Step 1: System Check	Loading Data - Empty Database
Step 2: Database Connectivity	The installer is ready to set up your OpenCATS data. Please pick the way you want the installer to set up OpenCATS:
Step 3: Loading Data	
	New Installation (Recommended)
Step 4: Setup Resume Indexing	Demonstration Installation
Step 5: Mail Settings	Restore Installation from Backup
Step 6: Loading Extras	You can always run the installer again to clear the database and choose a different option.
Step 7: Finishing Installation	Next->
Restart Install	

Step.4-full 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!

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



Step 1: System Check	Mail Settings						
Step 2: Database Connectivity	Please enter your e-mail address (for where OpenCATS e-mails should be replied to, etc.).						
Step 3: Loading Data	E-mail: * admin@testdomain.com						
Step 4: Setup Resume Indexing							
Step 5: Mail Settings	OpenCATS sends automati delivery via OpenCATS.	ic E-Mails on different events. Please cho	ose the mechanism for E-Mail				
Step 6: Loading Extras							
Step 7: Finishing Installation	Mail Support: *	SMTP w/Authorization	-				
	SMTP Host: *	localhost					
Restart Install	SMTP Port: *	587					
	SMTP Username: *	user 🔡					
	SMTP Password: *	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

 $Click\, {\tt next}$



Step 1: System Check	Loading Extras - Localization								
Step 2: Database Connectivity	Please choose your time zone.								
Step 3: Loading Data	GMT-06:00 Central Time (US and Canada)								
Step 4: Setup Resume Indexing	Please choose your preferred date forma	t.							
Step 5: Mail Settings	MM-DD-YYYY (US)								
Step 6: Loading Extras	Loading Extras - Choose Extras								
Step 7: Finishing Installation	OpenCATS comes with some optional features. You can enable them below.								
Restart Install	To add or remove features in the future, run the installer again.								
	Feature Name	Install	Do Not Install						
	United States Zip Code Lookup	\bigcirc	۲						
				Next>					

Step 7 Finishing installation

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

Note: The default username and password are: admin/admin or admin/cats (all lowercase) depending on your Open-CATS 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!

op	enca en. online.	ats						CATS A	dministrator	<admin< th=""><th>(testdom)</th><th>Logou ain.com) Administrator</th></admin<>	(testdom)	Logou ain.com) Administrator
Dashboard	Activities	Job Orders	Candidate	es Companies	Contacts	Lists	Calen	dar	Reports		Settings	
Dashboard	Activities	JOD OIGEIS	Candidate	es companies	Contacts	Lists	Calcin	uai	Reports		Jettings	
								Qu	iick Search	n:		Go
My Recer	nt Calls			My Upcomin	g Calls			My Up	coming	Events	5	
Recent H	ires				Hiring Ove	rview						
Name	Company		Recruiter	Date								Weekly
												Monthly
												Yearly
	N) D	ΑΤΑ		1 0 04/25 - 05		5/02 - 05/08		9 - 05/15		6 - 05/22	Submissions Interviews Hires
Importar	nt Candidate:	s (Submitt	ed, Intervie	wing, Offered in	Active Job Or	ders) -	Page 1 (O	Items)				
First Name	Last Na	ame St	atus	Position			Cor	npany				Modified
				N	o da	T	4					

CATS Version 0.9.2 Diablo. Powered by CATS.

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

CHAPTER 7

Install on Shared-hosting (Godaddy, Bluehost 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 Godaddy 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.

Note: As this documentation gets updated, the OpenCATS version in the images may not match the OpenCATS versions discussed in the documentation.

7.1 Download OpenCATS to your computer

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

OpenCATS Files

7.2 GoDaddy My Hosting Dashboard

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

Log into your Godaddy account Scroll down to the webhosting section and click manager (on the right) It should look like this:

GoDaddy I III My Hosting		Help C	enter ᆬ 🤹 🍏 🗸
Dashboard phpMyAdmin File Manager FTP Manager GoDaddy Analytics			
		cPanel Admin	Account Actions ¥
Applications	Installatron	Settings	
Nextcloud version 18.0.3	Manage	Account Data center	Server
Action Center		North America	Change
Action Center		PHP version 5.6	Change
Nothing needs your attention right now. When something does, it'll be here.		IP address 23.229.182.232	Сору
		SSH access Off	Manage
		• •	

- In the SSH access section, click Manage
- Turn SSH access On

7.3 CPanel-File Manager

• Click on CPanel Admin

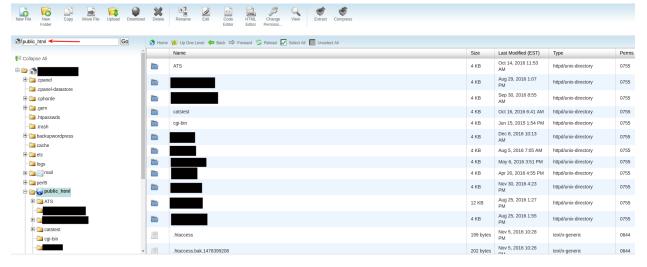
Towards the top, find the "files" section and click "File Manager".

FILES					-
File Manager		Directory Privacy	Disk Usage	Web Disk	
FTP Accounts	FTP Connections	Backup	Backup Wizard	Git [™] Version Control	
File and Directory Restor	ration				

It will open up a new tab in your browser.

Go	🚯 Home	🍘 Up One Level 🗢 Back 👄 Forward 🍒 Reload 🛃 Select All 🔲 Unselect All				
Collapse All		Name	Size	Last Modified (EST)	Туре	Perms
·		.cpanel	4 KB	Today 7:33 AM	httpd/unix-directory	0700
P 🟠 .cpanel		.cpanel-datastore	4 KB	Apr 9, 2015 8:15 PM	httpd/unix-directory	0755
- 🗀 .cpanel-datastore		.cphorde	4 KB	Nov 10, 2016 9:23 AM	httpd/unix-directory	0700
B 🚞 .cphorde B 🚞 .gem		.gem	4 KB	Oct 20, 2016 10:00 PM	httpd/unix-directory	0755
📴 .htpasswds 📴 .trash		.htpasswds	4 KB	May 11, 2015 11:22 AM	httpd/unix-directory	0755
🗄 🧰 backupwordpress		.trash	4 KB	May 11, 2015 11:27 AM	httpd/unix-directory	0700
🛄 cache ⊞ 🚞 etc		backupwordpress	4 KB	Jan 14, 2016 5:20 PM	httpd/unix-directory	0755
- 🗀 logs		cache	4 KB	Jan 29, 2016 5:44 PM	httpd/unix-directory	0755
e 늘 🖂 mail e 🍙 perl5		etc	4 KB	Dec 17, 2016 12:49 PM	httpd/unix-directory	0750
B 🚞 🎯 public_html 🔫		logs	4 KB	Dec 14, 2016 7:25 AM	httpd/unix-directory	0700
8 🧰 rails_apps 8 🧰 ruby		mail	4 KB	Aug 31, 2016 10:34 AM	mail	0751
e 🔁 ssl		perl5	4 KB	Oct 20, 2016 10:00 PM	httpd/unix-directory	0755
🗄 🛅 tmp		public_html	4 KB	Dec 23, 2016 12:46	publichtml	07

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



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

Click Upload

W File New Copy Move File Folder	Upload Download	Delete	Rename Edit Code HTML Change View Extract Compress				
/public_html	Go	🕥 Home	😰 Up One Level 🗢 Back 🖙 Forward 🍒 Reload 🖌 Select All 📗 Unselect All				
Collapse All	î		Name	Size	Last Modified (EST)	Туре	Per
🗁 🏠			ATS	4 KB	Oct 14, 2016 11:53 AM	httpd/unix-directory	07
.cpanel .cpanel-datastore				4 KB	Aug 29, 2016 1:07 PM	httpd/unix-directory	07
🗷 🚞 .cphorde				4 KB	Sep 30, 2016 8:55 AM	httpd/unix-directory	07
🗈 🚞 .gem			catstest	4 KB	Oct 16, 2016 6:41 AM	httpd/unix-directory	07
🗀 .htpasswds 🗀 .trash			cgi-bin	4 KB	Jun 15, 2015 1:54 PM	httpd/unix-directory	07
🕀 🧰 backupwordpress				4 KB	Dec 8, 2016 10:13 AM	httpd/unix-directory	07
🗀 cache				4 KB	Aug 5, 2016 7:05 AM	httpd/unix-directory	07
etc				4 KB	May 6, 2016 3:51 PM	httpd/unix-directory	07
🗈 🤖 🔀 mail				4 KB	Apr 20, 2016 4:55 PM	httpd/unix-directory	07
🖯 🧰 perl5 🖨 🎦 🌍 public_html				4 KB	Nov 30, 2016 4:23 PM	httpd/unix-directory	07
E 🔁 ATS		•		12 KB	Aug 25, 2016 1:27 PM	httpd/unix-directory	07
# `				4 KB	Aug 25, 2016 1:55 PM	httpd/unix-directory	07
🕀 🚞 catstest		10	.htaccess	199 byte	Nov 5, 2016 10:28 PM	text/x-generic	06
		100	.htaccess.bak.1478399208	202 byte	Nov 5, 2016 10:26	text/x-generic	06

This should bring you to a file upload screen.

Deload Files
Maximum file size allowed for upload: 150 MB
Select files to upload to: public_html Choose File No file chosen
Overwrite existing files:
Mode User Group World
Read 🗹 🗹
Write Execute
Permission 6 4 4
← Go Back to 'public_html"
C:\fakepath\OpenCATS-0.9.3-3.tar.gz: 7.51 MB complete

- Click Choose File
- Find the opencats-0.9.4-full.zip 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 opencats-0.9.4-3.zip we just uploaded and click it once to highlight it.
- Click on Extract at the top to extract the OpenCATS files from the Zip file.

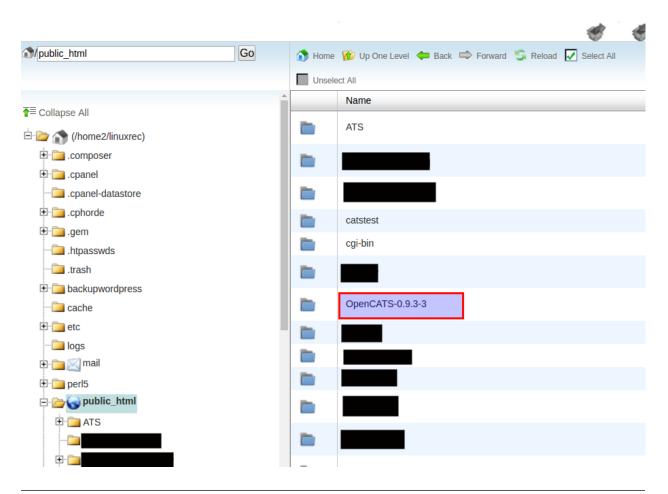


This should open a new screen:

New File New Folder	ad Delete	Rename Edit Code Editor Permissi
<pre> public_html Go </pre>	🕥 Home	👔 🕼 Up One Level 🗢 Back 🗢 Forward 🆏 Reload 📝 Select All
	Unsele	ect All
	*	Name
🖻 🦢 🏠 (/home2	Extr	ract
.composer		
Extract		
.cpanel-data: /public_html/OpenCATS-0.9.3-3.ta		
Enter the path to the file that you v	vish to extract	ti
⊕ igem		
intpasswds		
itrash		Extract File(s) Cancel
🗈 🚞 backupwordpress	10	error_log
		favicon.ico
🕩 🛅 etc	10	global_append.php
🛅 logs	10	global_prepend.php
🔁 🚞 🔀 mail	6	google3f21a59aab947059.html

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

Now you should see the extracted folder home 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.

7.4 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 Software section and click on "Select PHP Version".



This will open a screen to select what version of PHP your hosting is running. OpenCATS should have PHP 5.6.

HP Selector Extensions			Switch to PHP options Reset to default
urrent PHP version HP version	5.6		
apcu	ind 🖉	P _ pdf	5 🗌 stem
apm ares	ioncube_loader	🖌 pdo Dpdo_dblib	stomp
bcmath		pdo_firebird	sybase_ct
big_int	✓ json	🔽 pdo_mysql	sysvmsg
bitset	🕒 🔽 Idap	pdo_oci	sysvsem
 brotli bz2_filter 	libeventlibsodium	pdo_pgsql ✓pdo_sqlite	T dideways
🗌 dba	luasandbox	pgsql	tidy
dbx	lzf	phalcon	trader
dom doublemetaphone	M 🔲 mailparse	phalcon3	translit
	✓ mbstring ✓ mcrypt	🗸 phar 🗸 posix	U uploadprogress

Select the following extensions (If they are available) MySQL, PCRE, ctype, GD, LDAP, SOAP, ZIP

• Go back to the main CPanel menu

7.5 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 Database 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 Data	lbase	
New Database: linuxrec_	ec_ octest2	
Next S	tep	

- 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 Da	atabase Users		
Username:	linuxrec_ octest2	<u><u></u></u>	
	Note: -9 characters max	Χ.	
Password:	•••••	(a)	
Reenter Password:	•••••	٩	
Strength (Why?):			Password Generator
	Create User		
	← Go Back	← Go Ba	ack to the Main MySQL Databases Interface
• Check All priv	ileges.		
• 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

ALL PRIVILEGES				
ALTER	ALTER ROUTINE			
CREATE	CREATE ROUTINE			
CREATE TEMPORARY TABLES	CREATE VIEW			
✓ DELETE	✓ DROP			
EVENT	✓ EXECUTE			
✓ INDEX	✓ INSERT			
LOCK TABLES	REFERENCES			
SELECT	SHOW VIEW			
✓ TRIGGER	✓ UPDATE			

Next Step

If everything has been done correctly, you should be done in your web hosting account.

• Open your web browser

7.6 SSH and Run Composer

Download and install Putty (A program that allows you to SSH into the shared hosting server) Putty-Download '_">https://www.chiark.greenend.org.uk/~sgtatham/putty/latest.html>'_

For Ubuntu, in terminal type: sudo apt install putty

7.7 Install the OpenCATS software

In your browser, go to yourdomainname.com/OpenCATS (if you changed the main directory name, replace OpenCATS 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 OpenCATS Applicant Tracking System OpenCATS has not yet been installed, or a previous installation was not completed. Please visit the <u>Installation Wizard</u> to continue.

Step 1: System Connectivity

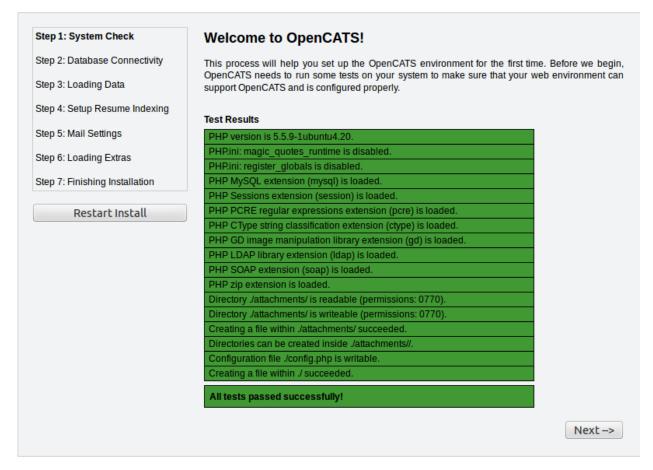
This step makes sure you have the required server environment set up correctly.

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 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 1: System Check	Database Configuration		
Step 2: Database Connectivity	The OpenCATS installer ne	eds some information about your M	lySQL database to continue the
Step 3: Loading Data		now this information, then please con that this is probably NOT the same a	
Step 4: Setup Resume Indexing	Database Name: *	cats_dev	
Step 5: Mail Settings	Database User: *	cats	
Step 6: Loading Extras	Database Password:	password	
Step 7: Finishing Installation			
	Database Host: *	localhost	(usually localhost)
Restart Install	Test Database Conr		

Step 3: Loading Data

Step 7: Finishing Installation

Restart Install

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	Loading Data - Empty Database
Step 2: Database Connectivity	The installer is ready to set up your OpenCATS data. Please pick the way you want the installer to up OpenCATS:
Step 3: Loading Data	up opendario.
Step 4: Setup Resume Indexing	New Installation (Recommended) Demonstration Installation
Step 5: Mail Settings	Restore Installation from Backup
Step 6: Loading Extras	You can always run the installer again to clear the database and choose a different option.

Next -->

set

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



Step 1: System Check	Resume Indexing Configuration
Step 2: Database Connectivity	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.
Step 3: Loading Data	Where can I get this software?
Step 4: Setup Resume Indexing	
Step 5: Mail Settings	doc file (Microsoft Word Document) Path to Antiword Executable: \path\to\antiword
Step 6: Loading Extras	Patrito Antiwold Executable. (patrito/antiwold
	Ipdf file (Adobe Acrobat Document)
Step 7: Finishing Installation	Path to PDFToText Executable: \path\to\pdftotext
Restart Install	
	Introl file (Hypertext Markup Document)
	Path to Html2Text Executable: \path\to\html2text
	Introduction of the second
	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.

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



Step 1: System Check	Mail Settings	
Step 2: Database Connectivity	Please enter your e-mail a	address (for where OpenCATS e-mails should be replied to, etc.).
Step 3: Loading Data	E-mail: *	admin@testdomain.com
Step 4: Setup Resume Indexing		
Step 5: Mail Settings	OpenCATS sends automa delivery via OpenCATS.	atic E-Mails on different events. Please choose the mechanism for E-Mail
Step 6: Loading Extras		
Step 7: Finishing Installation	Mail Support: *	SMTP w/Authorization
Step 7. I misming installation	SMTP Host: *	localhost
Restart Install	SMTP Port: *	587
	SMTP Username: *	user 📲
	SMTP Password: *	password

Step 6 Loading extras

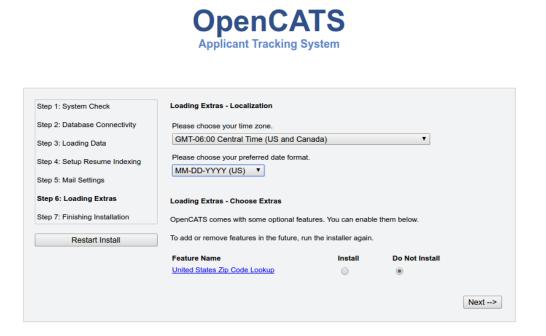
Don't forget to set the time zone to your area!

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

 $Click\, {\tt next}$



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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Success!!

Your brand new OpenCATS applicant System!

op	enca	ts		CATS Administrator <admin> (testdom</admin>	Logout
	oen. online. fre	e. b Orders Candidat	es Companies	Contacts Lists Calendar Reports Settings	
Dashboard	Activities Jo	b Orders Candidat	les Companies	Contacts Lists Calendar Reports Settlings	
				Quick Search:	Go
My Rece	nt Calls		My Upcomin	g Calls My Upcoming Events	
Recent H	lires			Hiring Overview	
Name	Company	Recruiter	Date		Weekly
					Monthly
					Yearly
	NO	DAT	4	1 0 04/25 - 05/01 05/02 - 05/08 05/09 - 05/15 05/16 - 05/22	Submissions Interviews Hires
Importa	nt Candidates (S	ubmitted, Intervi	ewing, Offered in	Active Job Orders) - Page 1 (0 Items)	
First Name	Last Name	Status	Position	Company	Modified 🔺
			N	O DATA	

CATS Version 0.9.2 Diablo. Powered by CATS. Server Response Time: 0.05 seconds. © 2005 - 2007 Cognizo Technologies, Inc.

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.

CHAPTER 8

OS X - OpenCATS Installation Instructions

8.1 OS X Prerequisites

Installation instructions are given for the MAMP default install environment only. Requires OS X 10.10.5 or later.

8.2 Downloading software and preparing your system

- Download and install MAMP
- Download OpenCATS-0.9.4-full
- Extract the files to : /Applications/MAMP/htdocs

8.3 Configure and start MAMP

Start MAMP (First steps)

- On your MAMP click on Preferences
- · Configure MAMP based on MAMP instructions

Configure Web Server

- Go to the Web Server tab
- Select Apache or Nginx (whichever is preferred)
- Select Document root /Applications/MAMP/htdocs

Setup PHP version

- Click the php tab
- Select php version 5.6.X

Warning: OpenCATS does not currently support php7. It must be 5.6.X

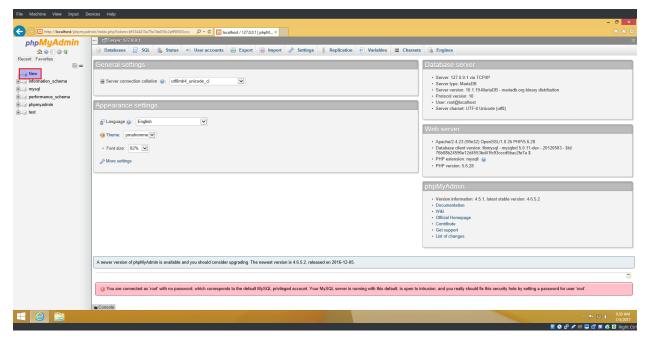
Note: if php 5.6.X is not in the options (free version supports only 2 php versions), it is necessary to define 'latest' versions.

Setup available PHP versions:

- · Open terminal
- Go to /Applications/MAMP/bin/php/ directory
- List php versions ls
- · Only the last two php versions listed with above command are displayed in the MAMP
- It is necessary to rename unwanted versions to move them to the begining of the list. Example: php5.6.1 and php5.6.15, then rename like this php5.6.15 to aphp5.6.15 (mv php5.6.15 aphp5.6.15)
- Close and start MAMP, you shoud see in preferences php versions as changed.

8.4 Create database

- On your MAMP click on Open WebStart Page
- It will open a browser with the MAMP dashboard
- From Tools select phpMyAdmin
- · It opens phpMyAdmin in browser
- On the left side, click new to create a new database

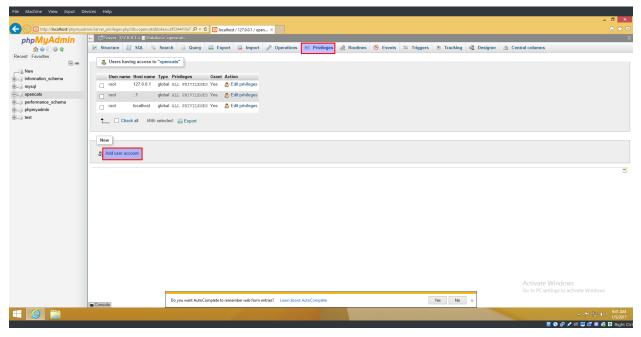


- In the box labeled database name type opencats.
- Hit create

File Machine View Input De	evices Help	
		- 6 ×
	imini/terver_distabuses.php?server=18taken=6f344410a79a76 / C 🔯 localhost / 127.0.0.1 phpM X	
phpMyAdmin	🕞 Databases 📙 SQL, 🔩 Status 🖭 User accounts 🚔 Export 📾 Import 🤌 Settings 🞚 Replication 🕑 Variables 🗮 Charsets 🖓 Engines	~
New	Databases	
mormation_schema mysql	强 Create database 💿	
performance_schema phpmyadmin	Database name Collation Create	
	Database Collation	
	information_schema utf9_general_c1 mm Check privileges	
	mysql latin1_swedish_ci =: Check privileges	
	performance_schema utf8_general_o1 mB Check prh/Beges	
	phpmyadmin utfe_bin =: Check privileges	
	test latini_evedich_ciam_Check privileges	
	Total: 5 latin1_swedish_ci	
	Check all With selected: 🙀 Drop	
	🏦 Note: Enabling the database statistics here might cause heavy traffic between the web server and the MySQL server.	
	Enable statistics	
		1
🛋 🙆 🚞		≏ 🏴 🔛 🕪 9:33 AM 1/5/2017

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

File Machine View Input Dev	evices Help	
		- 0 ×
	imini/zerzy prinileges php?badsizers 18xdbnume-opencatx8x D + C 🔯 localhoid / 127.0.0.1 phpM ×	n ★ 0
	 CScrver 127 00 1 Databases Databases Soll	~ ~
Recent Favorites	Add user account	
🖲 🗐 mysql	Login Information	
e gerformance_schema	User name: Use text field: 👽 opencals	
● phpmyadmin ● test	Host name: Local V localhost	
	Password: Use text field:	
	Re-type: •	
	Authentication Plugin Native MySQL authentication	
	Generate password: (Generate)	
	Database for user account Create database with same name and grant all privileges. Grant all privileges on uldicard name (nearmame). %) V Grant all privileges on database "repercate" Global privileges Check all Administration Resource limits	Activate Windows Go to PC settings to activate Windows.
🖶 🙆 🚞		← 🏴 役 🐠 9:44 AM 1/5/2017
		📓 💿 🗗 🥒 📖 🛄 📅 📓 🚳 🖸 Right Ctrl

8.5 Moving your OpenCATS Applicant Tracking System directory.

The current default directory name for the OpenCATS files is /Applications/MAMP/htdocs/home.

- Go to: /Applications/MAMP/htdocs/travis/build/opencats
- Right click on the OpenCATS directory, select cut.
- Go to: /Applications/MAMP/htdocs, right click and select paste. We have moved the main Open-CATS directory into the htdocs directory.
- Right click on the home directory and delete it. We don't need it anymore.
- Double click on the OpenCATS directory to go into it.
- Right click on the INSTALL_Block directory and delete it. The INSTALL_BLOCK file or folder will prevent OpenCATS from being installed on your system.

8.6 OPTIONAL - Renaming your OpenCATS directory

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

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

- · Simply navigate to /Applications/MAMP/htdocs/
- · Right click on the OpenCATS directory
- Click rename
- Rename the directory whatever you want (example: ATS)

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

8.7 Set up OpenCATS

- On your MAMP click on Open WebStart Page
- It will open a browser with MAMP dashboard
- From the menu, choose My Website
- It will open the OpenCATS installation page in the browser.

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

http://localhost/openCATS-0.9.3-3/installwizard.php	・ C 🗵 OpenCATS - Installati		
C Imp://iccalheat/openCATS-083-3/initalivitard.php	Step 1: System Check Step 2: Database Connectivity Step 2: Database Connectivity Step 4: Step Resume Indicating Step 4: Step Resume Indicating Step 5: Mail Settings Step 6: Loading Extras Step 7: Finishing Installation Restart Install	Applicant Tracking System Applicant S	
		Federace CentO-SHRIEL; And "not in riskal pile-skage" on "yum initial pile-skage" and restart you velosever. DHS 50AB extensions (seep) is not Readed. Check you extensions (seep) is not Readed. Under our starts (Linux / EBD shorts 50AP, but CA15 Professional functionality will not be supported. Urbants: Run "agel get Instat pile-seep" and reatiat your velosever. Debase: Run "agel get Instat pile-seep" and reatiat your velosever. Debase: Run "agel get Instat pile-seep" and reatiat your velosever.	Activate Windows
		ectensions port and relatively our vebserver. PHP 2g extension is loaded. Directory Jatan-Intensify is readed (extensions: 0777). Directory Jatan-Intensify is uniteable intermissions: 0777.	Go to PC settings to activate Windows.

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 1: System Check	Database Configuration		
Step 2: Database Connectivity	· · · · · · · · · · · · · · · · · · ·	eeds some information about your N	, c
Step 3: Loading Data		now this information, then please co that this is probably NOT the same	
Step 4: Setup Resume Indexing	Database Name: *	cats dev	
Step 5: Mail Settings	Database User: *	cats	
Step 6: Loading Extras	Database Password:	password	
Step 7: Finishing Installation	Database Host: *	localhost	(usually localhost)
Restart Install			(,
	Test Database Conr	nectivity	

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



Step 1: System Check	Loading Data - Empty Database
Step 2: Database Connectivity	The installer is ready to set up your OpenCATS data. Please pick the way you want the installer to set up OpenCATS:
Step 3: Loading Data	
Step 4: Setup Resume Indexing	New Installation (Recommended) Demonstration Installation
Step 5: Mail Settings	Restore Installation from Backup
Step 6: Loading Extras	You can always run the installer again to clear the database and choose a different option.
Step 7: Finishing Installation	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



Step 1: System Check	Mail Settings		
Step 2: Database Connectivity	Please enter your e-mail a	address (for where OpenCATS e-mails sh	ould be replied to, etc.).
Step 3: Loading Data	E-mail: *	admin@testdomain.com	
Step 4: Setup Resume Indexing			
Step 5: Mail Settings	OpenCATS sends automa delivery via OpenCATS.	tic E-Mails on different events. Please ch	oose the mechanism for E-Mail
Step 6: Loading Extras			
Step 7: Finishing Installation	Mail Support: *	SMTP w/Authorization	•
Step 7. Finishing Installation	SMTP Host: *	localhost	
Restart Install	SMTP Port: *	587	
	SMTP Username: *	user 🔡	
	SMTP Password: *	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



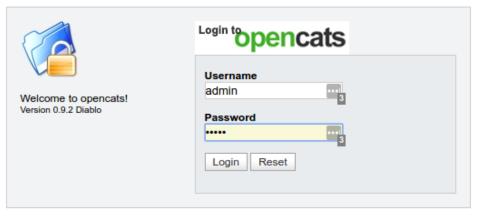
Step 1: System Check	Loading Extras - Localization			
Step 2: Database Connectivity	Please choose your time zone.			
Step 3: Loading Data	GMT-06:00 Central Time (US and Ca	nada)	•	
Step 4: Setup Resume Indexing	Please choose your preferred date format	L.		
Step 5: Mail Settings	MM-DD-YYYY (US) V			
Step 6: Loading Extras				
Step 6. Loading Extras	Loading Extras - Choose Extras			
Step 7: Finishing Installation	OpenCATS comes with some optional fea	tures. You can enable	e them below.	
Restart Install	To add or remove features in the future, ru	n the installer again.		
	Feature Name	Install	Do Not Install	
	United States Zip Code Lookup	\bigcirc	۲	
				Next>

Step 7 Finishing installation

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

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

Click Start OpenCATS for your login screen.



Join the Conversation - opencats forums.

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Success!!

Your brand new OpenCATS applicant System!

shboard	Activities Jo	b Orders Candidates	Companies	Contacts Lists	Calendar Reports Quick Searc		Go
My Recei	nt Calls		My Upcomin	g Calls	My Upcoming	Events	
Recent H	ires			Hiring Overview			
Name	Company	Recruiter	Date				Weekly
							Monthly
							Yearly
	NU	DATA		1	O DAT	05/16 - 05/22	Submission: Interviews Hires
mportar	nt Candidates (S	ubmitted, Interviev	ving, Offered in	Active Job Orders) - Pa	ge 1 (0 Items)		
First Name	Last Name	Status	Position		Company		Modified 🔺
			N	o data	A.		

CATS Version 0.9.2 Diablo. Powered by CATS.

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

CHAPTER 9

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.

This script is updated for OpenCATS-0.9.4-3.

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.

9.1 Get the correct script for your distribution

Wget the install script for your Distro by typing/copy-paste the following into your terminal.

Ubuntu16.04:\$ wget https://raw.githubusercontent.com/opencats/OpenCATS-Installation-Scripts/master/Ubuntu16.04-OpenCATS-Install.shUbuntu18.04:\$ wget https://raw.githubusercontent.com/opencats/OpenCATS-Installation-Scripts/master/Ubuntu18.04-OpenCATS-Install.sh

List directory to see the file name: 1s

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

Run the script: sudo ./script-name.sh Wait until it is finished.

9.2 Install the OpenCATS software

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

 $Click: {\tt Installation Wizard}$





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.

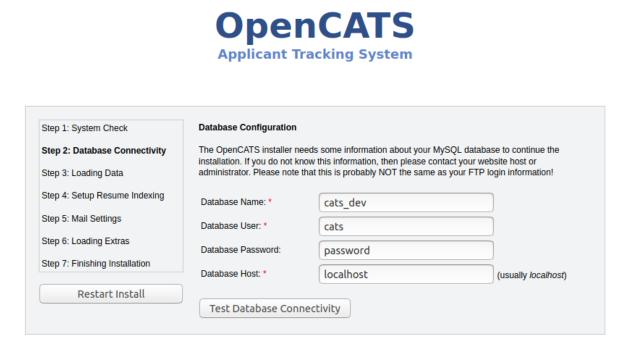
If there are no issues, it should be all green, click Next

Step 1: System Check	Welcome to OpenCATS!
Step 2: Database Connectivity	This process will help you set up the OpenCATS environment for the first time. Before we begin
Step 3: Loading Data	OpenCATS needs to run some tests on your system to make sure that your web environment ca support OpenCATS and is configured properly.
Step 4: Setup Resume Indexing	Test Results
Step 5: Mail Settings	PHP version is 5.5.9-1ubuntu4.20.
Step 6: Loading Extras	PHP.ini: magic_quotes_runtime is disabled.
Step 0. Loading Exats	PHP.ini: register_globals is disabled.
Step 7: Finishing Installation	PHP MySQL extension (mysql) is loaded.
	PHP Sessions extension (session) is loaded.
Restart Install	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 (Idap) 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.

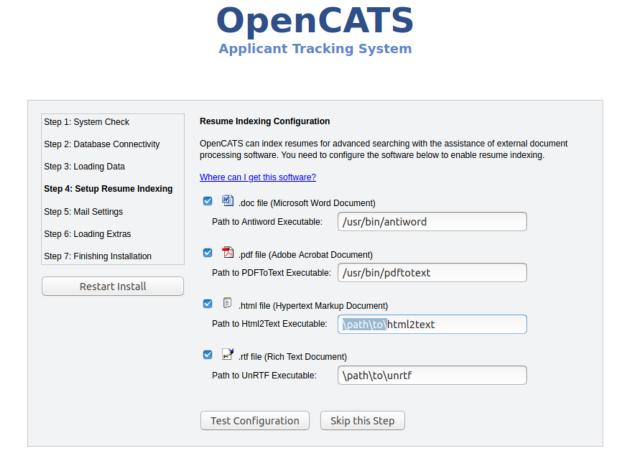
Note: Restore installation from backup will be covered in a future tutorial



Step 1: System Check	Loading Data - Empty Database
Step 2: Database Connectivity	The installer is ready to set up your OpenCATS data. Please pick the way you want the installer to set up OpenCATS:
Step 3: Loading Data	
Step 4: Setup Resume Indexing	New Installation (Recommended)
	Demonstration Installation
Step 5: Mail Settings	Restore Installation from Backup
Step 6: Loading Extras	You can always run the installer again to clear the database and choose a different option.
Step 7: Finishing Installation	Next>
Restart Install	1

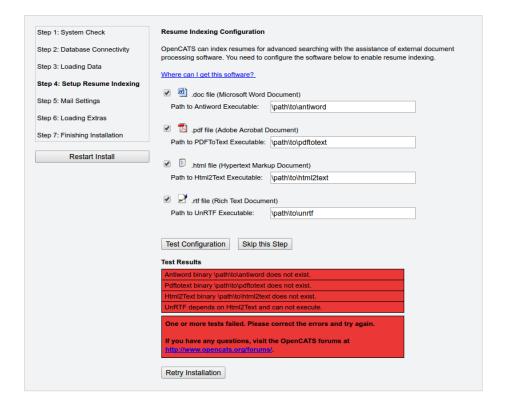
Step 4 Setup resume indexing

- 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.

• Click, Click, click, it will turn green.

	OpenCATS Applicant Tracking System
Step 1: System Check	Resume Indexing Configuration
Step 2: Database Connectivity	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.
Step 3: Loading Data	Where can I get this software?
Step 4: Setup Resume Indexing	.doc file (Microsoft Word Document)
Step 5: Mail Settings	Path to Antiword Executable: /usr/bin/antiword
Step 6: Loading Extras	
Step 7: Finishing Installation	Indf file (Adobe Acrobat Document)
Deshark leadall	Path to PDFToText Executable: //usr/bin/pdftotext
Restart Install	Itml file (Hypertext Markup Document)
	Path to Html2Text Executable: //usr/bin/html2text
	Irtf file (Rich Text Document)
	Path to UnRTF Executable: /usr/bin/unrtf
	Test Configuration Skip this Step
	Test Results
	Antiword binary /usr/bin/antiword can convert DOC files to text. Pdftotext binary /usr/bin/pdftotext can convert PDF files to text.
	Html2Text binary /usr/bin/html2text can convert HTML files to text.
	All tests passed successfully!
	Next->

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



Step 1: System Check	Mail Settings	
Step 2: Database Connectivity	Please enter your e-mail a	address (for where OpenCATS e-mails should be replied to, etc.).
Step 3: Loading Data	E-mail: *	admin@testdomain.com
Step 4: Setup Resume Indexing		
Step 5: Mail Settings	OpenCATS sends automa delivery via OpenCATS.	tic E-Mails on different events. Please choose the mechanism for E-Mail
Step 6: Loading Extras		
Step 7: Finishing Installation	Mail Support: *	SMTP w/Authorization
	SMTP Host: *	localhost
Restart Install	SMTP Port: *	587
	SMTP Username: *	user
	SMTP Password: *	password
		Next>

Step 6 Loading extras

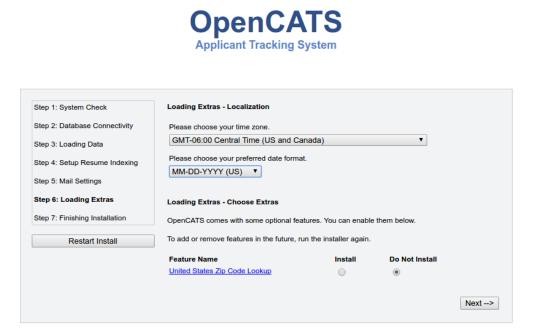
Don't forget to set the time zone to your area!

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

 $Click\, {\tt next}$

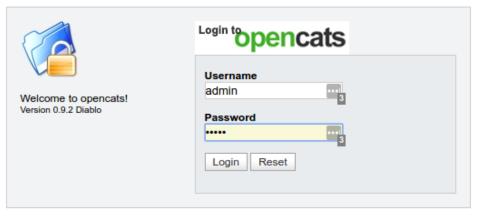


Step 7 Finishing installation

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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Success!!

Your brand new OpenCATS applicant System!

opence	ats		CATS Administrator <admin> (testdoma</admin>	Log in.com) Administra
shboard Activities	Job Orders Candidates	Companies	Contacts Lists Calendar Reports Settings	
			Quick Search:	Go
ly Recent Calls		My Upcoming	Calls My Upcoming Events	
Recent Hires			Hiring Overview	
Name Company	Recruiter	Date		Weekly
				Monthly
				Yearly
NC) DATA		0 04/25 - 05/01 05/02 - 05/08 05/09 - 05/15 05/16 - 05/22	Submissions Interviews Hires
mportant Candidates	(Submitted, Interviewi	ing, Offered in	Active Job Orders) - Page 1 (0 Items)	
First Name Last Nam	ne Status Po	osition	Company	Modified 🔺
irst Name Last Nar	ne Status Po	osition	Company	Modified 🔺

CATS Version 0.9.2 Diablo. Powered by CATS.

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

Warning: Immediately change your admin password!

- Click Settings
- $\bullet \ Click \ {\tt Administration} \\$
- Click User Management
- Click your name
- Click edit
- \bullet Click reset password
- Type your new password
- Click save

CHAPTER 10

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**.

10.1 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

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!

10.2 Ubuntu16.04-Installing Apache2

• \$ sudo apt-get install apache2

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.

8	Apache2 Ubuntu Default Page: It works - Mozilla Firefox		- + ×
<u>File Edit View History Bookmarks</u> Tools <u>Help</u>			
Apache2 Ubuntu Default Page: +			
< 🕑 localhost		😭 🔻 🖒 🔣 🕶 Google	9 🖟 🖓
	Apache2 Ubuntu Default Page		
	This is the default welcome page used to test the correct operation of the Apache2 server after installation on Ubuntu systems. It is based on the equivalent page on Debian, from which the Ubuntu Apache packaging is derived. If you can read this page, it means that the Apache HTTP server installed at this site is working properly. You should replace this file (located at /var/www/html/index.html) before continuing to operate you HTTP server.	1	
	If you are a normal user of this web site and don't know what this page is about, this probably means that the site is currently unavailable due to maintenance. If the problem persists, please contact the site's administrator.		
	Configuration Overview		
	Ubuntu's Apache2 default configuration is different from the upstream default configuration, and split into several files optimized for interaction with Ubunt tools. The configuration system is fully documented in usryhare / doc/apache2/README . Debian.gz . Refer to this for the full documentation. Documentation for the web server itself can be found by accessing the manual if the apache2-doc package was installed on this server. The configuration layout for an Apache2 web server installation on Ubuntu systems is as follows:		
	/etc/apache2/ apache2.conf mods-enabled mds-enabled *.load *.conf conf-enabled *.conf site-enabled *.conf		
	apache2.conf is the main configuration file. It puts the pieces together by including all remaining configuration files when starting up the web server. ports.conf is always included from the main configuration file. It is used to determine the listening ports for incoming connections, and this file can be customized anytime. Configuration files in the mods -enabled/, conf -enabled/ and sites -enabled/ directories contain outcular construction snipoets which manage modules, global configuration finements,		
🕋 🔝 📰 🔲 🔮 Apache2 Ubuntu	40) 003 音 💼 1056 ტ	9 C) 🥏 🖉 🗔 🗮 🔟 🐼 🗿 Right Ctrl

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

10.3 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

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:

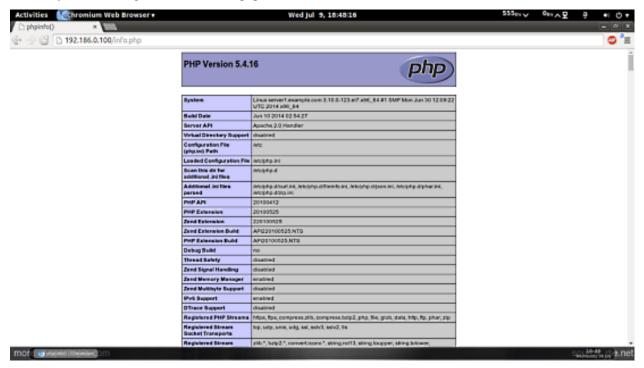
<?php

?>

```
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.

10.4 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!

10.5 Download the OpenCATS files

- \$ cd /var/www/html
- \$ sudo wget https://github.com/opencats/OpenCATS/releases/download/0.9.4/ opencats-0.9.4-full.zip
- \$ sudo unzip opencats-0.9.4-full.zip
- \$ sudo mv /var/www/html/home/travis/build/opencats/OpenCATS opencats
- \$ sudo rm -Rf /var/www/html/home /var/www/html/opencats/INSTALL_BLOCK

Note: By default in this documentation for OpenCATS version 0.9.4 the directory would be opencats. 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 capitol 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.

10.6 Server and Directory permissions

• \$ sudo chown www-data:www-data opencats

Warning: make sure this is set to **EXACTLY** the name of your OpenCATS directory, default for version 0.9.4 would be OpenCATS-0.9.4

- \$ sudo chown -R www-data:www-data opencats
- \$ sudo chmod 770 opencats/attachments
- \$ sudo chmod 770 opencats/upload

10.7 Install resume indexing tools

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

10.8 Install the OpenCATS software

In your browser, go to localhost/opencats (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	Welcome to OpenCATS!
Step 2: Database Connectivity	This process will help you set up the OpenCATS environment for the first time. Before we begi
Step 3: Loading Data	OpenCATS needs to run some tests on your system to make sure that your web environment ca support OpenCATS and is configured properly.
Step 4: Setup Resume Indexing	Test Results
Step 5: Mail Settings	PHP version is 5.5.9-1ubuntu4.20.
Step 6: Loading Extras	PHP.ini: magic_quotes_runtime is disabled.
Step 0. Eduling Extrus	PHP.ini: register_globals is disabled.
Step 7: Finishing Installation	PHP MySQL extension (mysql) is loaded.
	PHP Sessions extension (session) is loaded.
Restart Install	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 (Idap) 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 J 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.

OnenCATS

Database Configuration		
Database Name: *	cats dev	
Database User: *	cats	
Database Password:	password	
Database Host: *	localhost	
	The OpenCATS installer ne installation. If you do not kr administrator. Please note Database Name: * Database User: * Database Password:	The OpenCATS installer needs some information about you installation. If you do not know this information, then please administrator. Please note that this is probably NOT the same Database Name: * Cats_dev Database User: * Cats Database Password: password

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



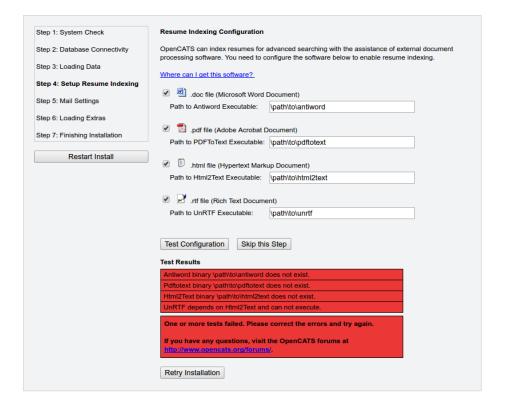
Step 1: System Check	Loading Data - Empty Database
Step 2: Database Connectivity	The installer is ready to set up your OpenCATS data. Please pick the way you want the installer to set up OpenCATS:
Step 3: Loading Data	
	New Installation (Recommended)
Step 4: Setup Resume Indexing	Demonstration Installation
Step 5: Mail Settings	Restore Installation from Backup
Step 6: Loading Extras	You can always run the installer again to clear the database and choose a different option.
Step 7: Finishing Installation	Next>
Restart Install]

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!

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



Step 1: System Check	Mail Settings	
Step 2: Database Connectivity	Please enter your e-mail a	ddress (for where OpenCATS e-mails should be replied to, etc.).
Step 3: Loading Data	E-mail: *	admin@testdomain.com
Step 4: Setup Resume Indexing		
Step 5: Mail Settings	OpenCATS sends automa delivery via OpenCATS.	tic E-Mails on different events. Please choose the mechanism for E-Mail
Step 6: Loading Extras		
	Mail Support: *	SMTP w/Authorization
Step 7: Finishing Installation	SMTP Host: *	localhost
Restart Install	SMTP Port: *	587
	SMTP Username: *	user
	SMTP Password: *	password
		Next>

Step 6 Loading extras

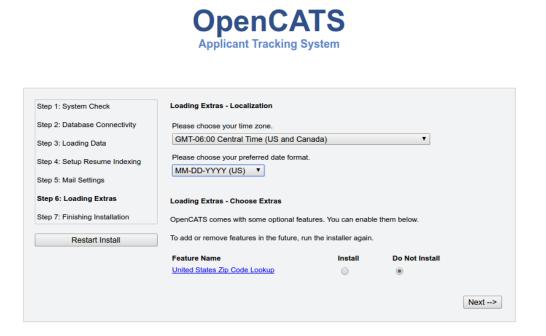
Don't forget to set the time zone to your area!

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

 $Click\, {\tt next}$



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.

© 2005 - 2007 Cognizo Technologies, Inc. Based upon original work and Powered by CATS.

Success!!

Your brand new OpenCATS applicant System!

	enc							CATS	Administrato	r <admin></admin>	(testdoma	Lain.com) Adminis	ogout trator
Dashboard	en. online. Activities	Job Orders	Candidates	Companies	Contacts	Lis	ts Cale		Reports		ettings		
								c	uick Searc	h:			Go
My Recen	t Calls			My Upcomi	ng Calls			My U	lpcoming	Events			
Recent H	ires				Hiring	Overvie	w						
Name	Company	R	ecruiter	Date								Weekly	
												Monthly	
												Yearly	
	N) D /	ATA		1 0 04/2	5 - 05/01	05/02 - 05/08		09 - 05/15		- 05/22	Submissio	
Importan	t Candidate	s (Submitte	d, Interviewi	ing, Offered i	n Active Jo	b Orders) - Page 1 (0) Items	;)				
First Name	Last N	ame Stat	us Po	osition			Co	mpany				Modified 🔺	
				N	OD		Ά						

CATS Version 0.9.2 Diablo. Powered by CATS.

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

CHAPTER 11

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.

11.1 OpenCATS dashboard/home screen

openc open. online	ats									O Lo John Brown <demo> (testdomain.</demo>
shboard Activities	Job Orders Cand	idates Companies C	Contacts Lists	Calendar Reports	Settings	Ope	nCATS Module	Tabs		
cent: John Smith Bert van	n Oostveen test list Edu	cula Rey johnny Alpha 🔫	Recent Acti	vities					Quick Searc	h: G
ly Recent Calls 🛛 🔫			My Up	coming Calls 🔫	-		My Upcoming Eve	ents 🔶		
9-06-18 12:10 AM: 3-05-18 09:10 PM: 3-04-18 03:51 AM: 3-04-18 03:51 AM: 3-12-17 04:11 PM: 3-12-17 01:39 PM: 3-11-17 01:00 AM: 3-11-17 01:00 AM: 3-11-	van Oostveen Bunny Iy Alpha ope pachwasdd		12-10-16	08:00 AM: Test call to Bert			14-10-16 09:00 AM: Me	eting with Majo	r client	
ecent Hires 🔫					Hiring Overviev	v 🔶				
ame	Cor	npany	Recruiter	Date					Weeklu	
hn Smith		C S. A.	John B.	12-09-16					-	
nnny Alpha	ABO	C S. A.	John B.	12-09-16					Monthly	
shali Jain	Inte	rnal Postings	John B.	28-08-16					Yearly	
ilippe pachwasdd	Inte	rnal Postings	John B.	25-08-16						
					4 3 2 1 0 2013	2014	2015	3 4 4 2016	Submissions Interviews Hires	
mportant Candidate	s (Submitted, Inter	rviewing, Offered in Ac	tive Job Orders) - Pa	ige 1 (7 Items)					4	
rst Name	Last Name	Status	Position -				Company			Modified
zyon	mbala	Interviewing	ASP.Net				Internal Postings			21-09-16
johnny	Alpha	Offered	dsfsdfsdf				Internal Postings			27-08-16
Educula	Rey	Submitted	Factory Assistant				Team A			05-10-16
Thi Huê	Ðinh	Interviewing	JAVA Developer				ABC S. A.			31-08-16
Allen	Yan	Interviewing	JAVA Developer				ABC S. A.			12-09-16
Vishali	Jain	Offered	Position A				Team A			27-09-16
zvon	mbala	Offered	Software Develop				Directi			19-09-16

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.

11.2 Activities Screen

open. online. free.	-					John Brown <demo> (testde</demo>
ard Activities Job C	Orders Candidates Comp	anies Contacts	ists Calendar Reports	Settings		
Bert van Oostveen John Smi	th Factory Assistant test list E	ducula Rey				Quick Search:
Activities				First << P	Incur Dage 1 of 7 Neutral Lasta Taday I Vester	rday Last Week Last Month Last 6 Mon
Activities					Tev Page 1 017 Next >> Last > Today fester	day Last week Last Month Last 6 Mon
ities - Page 1						Rows Per Page
Date 🔺	First Name	Last Name	Regarding	Activity	Notes	Entered By
09-06-18 (12:10 AM)	🖁 Bert	van Oostveen	General	Call	test test	John B.
08-05-18 (09:10 PM)	A Bert	van Oostveen	General	Other	Added candidate to pipeline.	John B.
08-04-18 (03:51 AM)	A Bugs	Bunny	Test (Internal Postings)	Call (Talked)	Status change: Placed	John B.
08-12-17 (04:11 PM)	🖁 johnny	Alpha	dsfsdfsdf (Internal Postings)	Call (Missed)	Status change: Contacted	John B.
08-12-17 (01:39 PM)	A philippe	pachwasdd	test (Internal Postings)	Call	Status change: Contacted	John B.
08-11-17 (01:00 AM)	🛎 johnny	Alpha	dsfsdfsdf (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)	Landidate 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	asdfasdf	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)	A nguyen	а	Embarqué (Internal Postings)	Other	Added candidate to pipeline.	John B.
07-10-16 (01:49 PM)	& Pirla	Coglione	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)	anguven 🖁	а	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.

11.3 Job Orders Screen

oard	Activities	e. free. Job Orders Candidates Compar	nies Contacts Lists Calenda	ar Reports	Settings							
ob Orde	ar Search.	Job Orders										
		Head of R&D Embarqué nguyen a								Quick Search:		٦
Jo	b Order	s: Home					Activ	ve / On Hol	d / Full 🔻	Only My Job Ord	lers 🔲 Only Hot Job	0
Orde	rs - Page 1	(32 Items) (Active / OnHold / Ful	1)								Rows Per Page	
l I	ID	Title	Company	Туре	Status	Created 🔺	Age	S	Р	Recruiter	Owner	
	38	asdf	Internal Postings	н	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	н	Active	04-10-16	7	0	0	John B.	John B.	
	35	Factory Assistant	Team A	н	Active	04-10-16	7	1	2	John B.	John B.	
	34	Head of R&D	aa com	н	Active	03-10-16	8	0	5	John B.	John B.	
	33	CCE	HInduja	н	Active	01-10-16	10	1	1	John B.	John B.	
	32	asdasdadad	aa com	н	Active	01-10-16	10	0	0	John B.	John B.	
	31	Test Questionnaire	aa com	н	Active	30-09-16	11	0	0	CATS A.	John B.	
	30	drótkoszorús	opencats	н	Active	30-09-16	11	0	0	John B.	John B.	
	29	ITO1	aa com	н	Active	28-09-16	13	0	0	John B.	John B.	
	28	IT01	aa com	Н	Active	28-09-16	13	0	0	John B.	John B.	
	27	senior engineer	Internal Postings	н	Active	27-09-16	14	0	1	John B.	John B.	
	26	my test job	Internal Postings	н	Active	26-09-16	15	0	2	John B.	John B.	
	25	Software Engineer	Internal Postings	н	Active	22-09-16	19	0	3	John B.	John B.	
	24	manager	Team A	н	Active	21-09-16	20	0	2	John B.	John B.	

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

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

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

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

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

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



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

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

Action:

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

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

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

OR:

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

11.4 Candidates Screen

oard Activitie		Companies Conta	icts Lists	Calendar Re	ports Settings				
	ch Candidates CE HInduja Educula R						Quick Searc	h	
a journy supria (c							Quick Searc	n:	
Candida	tes: Home				< First << Prev Page 1	of 3 Next >> Last >	Only My Candidates	Only Hot Cand	idates Filter b
didates - Page	e 1 (43 Items)							Row	s Per Page
First Name	Last Name	E-Mail	State	Recent Status	Recent Status (Extended)	City	Key Skills	Modified 🔺	Available
shiv kumar	kamat	kamatshivkumar4@gmail.com	Maharashtra	No Contact	No Contact Internal Postings - AAAAAAAAAAA	pune		11-10-16	
nguyen	а	mail1@yahoo.com	84	Submitted	Submitted Internal Postings - AAAAAAAAAAA	ho chi minh		11-10-16	
johnny	Alpha	secret@nsa.com		Placed	Placed ABC S. A Steel Erector		forklift, quickbooks, selector	11-10-16	
Test	Test			Submitted	Submitted Team A - Factory Assistant			11-10-16	
Bert	van Oostveen			No Contact	No Contact aa com - Head of R&D		Java SAP .NET	11-10-16	
Robert	West			No Contact	No Contact aa com - Head of R&D			10-10-16	
Pirla	Coglione			No Contact	No Contact aa com - Head of R&D		Accountant	07-10-16	07-10-16
John	Smith			No Contact	No Contact Team A - Factory Assistant	Barnegat	Development	07-10-16	01-10-16
Educula	Rey			Submitted	Submitted Team A - Factory Assistant			05-10-16	
Jace	Rippin	Isadore@marilyne.biz	North Carolina			Rosenbaumtown	velit	05-10-16	08-09-16
Irudaya	Raj							04-10-16	
Mike	Christianson	mike@optimum7.com		Contacted	Contacted Internal Postings - dsfsdfsdf		Engineer	03-10-16	
Katrien	Wouters			No Contact	No Contact aa com - Head of R&D		educatie	03-10-16	01-11-16
David	Piquette			No Contact	No Contact aa com - Head of R&D			03-10-16	
philippe	pachwasdd	adel.pasch@gmail.com		Placed	Placed Internal Postings - test		revit, word, autocad	02-10-16	

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)

甩	First Name Last Nam	
Sho	ow Columns:	
	Attachments	
1	E-Mail	
	2nd E Mail	
	2nd E-Mail Home Phone Cell Phone Work Phone Address	
	Coll Phone	
	Cell Phone Work Dhone	
	Address	
	City	
	State	
	State	
	Zip Misc Notes Web Site	
	Misc Notes	
	Web Site	
	Key Skills	
	Recent Status	
	Recent Status (Extended)	
	Source	
	Available	
	Current Employer	
	Current Pay	
	Current Employer Current Pay Desired Pay Can Relocate Owner	
	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.

	Bert	van Oostveen	
	Robert	West	
	Pirla	Coglione	
	John	Smith	
	Educula	Rey	
	Jace	Rippin	Isad
	Irudaya	Raj	
	Mike	Christianson	mike
	Katrien	Wouters	
	David	Piquette	
	philippe	pachwasdd	ade
	Action		
Add	To List To Pipeline d E-Mail ort	Selected All Selected All Selected All Selected All	

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

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

11.5 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.

board Activities Job Orders	s Candidates Companies	Contacts	Lists Calend	dar Report	ts Settings				
Company Search Companies (Contacts	Lists Galeria	иа Кероп	is Gettings	_			
ent: shiv kumar kamat Bert van Oostve		test list							Quick Search:
Companies: Home									Only My Companies Only Hot Compar
ompanies - Page 1 (13 Items)									Rows Per Page
Name	Jobs City	State	Phone	Owner	Created _	Modified	Web Site	Contact	Misc Notes
now Columns:	1			John B.	01-10-16	01-10-16			
Attachments	5			John B.	28-09-16	28-09-16			
Jobs Phone	3		555-821765	John B.	20-09-16	26-09-16			has ford contract
Phone 2	1			John B.	17-09-16	17-09-16			
City State	1 Mumbai	Maharashtra	830-978-3095	John B.	15-09-16	15-09-16			
Zip Web Site	1			John B.	13-09-16	13-09-16			
Owner Contact	1 Indore	Madhya Pradesh		John B.	13-09-16	13-09-16			
Created Misc Notes				John B.	12-09-16	12-09-16			
				John B.	07-09-16	07-09-16			
Reset to Default Columns	1			John B.	07-09-16	07-09-16			
ABC S. A.	3			John B.	29-08-16	29-08-16			
opencats	2			John B.	22-08-16	22-08-16			opensource
) 🔗 Internal Postings	14				19-11-09	19-11-09			

11.6 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.

Contact Search (s Job Orders Candic	dates Companies Cont	acts Lists Cal	endar Reports Set	tings				
		anager aaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaa	sadfsad sadsa					Quick Sear	ch:
Contacts	: Home							Only	My Contacts Only Hot Contact
ontacts - Page 1	(7 Items)								Rows Per Page Fi
First Name	Last Name	Company	Title	Work Phone	Owner	Created A	Modified	Cell Phone	E-Mail
Juan Carlos	Salas P	Internal Postings	Pistero		John B.	25-09-16	07-10-16		
] John	Smith	Team A	Manager		John B.	21-09-16	21-09-16		
Dustin	Testing	Internal Postings	president	813-488-8795	John B.	15-09-16	15-09-16	748-987-456	testing@guesswho.net
] Jyothis	Jayakumar	ABC S. A.	mr		John B.	08-09-16	08-09-16	729-311-2800	mialdioasdu@hsd.com
A	С	R V2	CEO		John B.	07-09-16	07-09-16		
) F	С	R V1	CEO		John B.	07-09-16	07-09-16		
) johnny	Alpha	opencats	demo		John B.	22-08-16	27-08-16		JohnnyB@good.com
Action								ABCDEFGHIJI	KLMNOPQRSTUVWXYZ
dd To List kport	Selected All Selected All								

```
Server Response Time: 0.01 seconds.
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```

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

11.7 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.

Lists 🔶								
nt: Business De	evelopment. Taxless company manage	er aaaaaaaaaaaaaaaaaaa zzzzz sad	fsad sadsa				Quick Search:	
1.1-4-1	Usersa							
Lists:	Home							
ts - Page 1 ((4 Items)							Rows Pe
Count	Description			Data Type	List Type	Owner	Created	Modified
2	test list			Candidate	Static	John B.	25-08-16	30-09-16
2	tesst			Job Order	Static	John B.	04-10-16	11-10-16
2	sdfsdfssdfsfdsdfdsf			Job Order	Static	John B.	13-09-16	04-10-16
2	aaa			Job Order	Static	John B.	14-10-16	14-10-16
							ABCDEFGHIJKLMN	

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

11.8 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.

opencats							
Dashboard Activities Job Orders	Candidates Co	mpanies Cor	tacts List	s Calenda	r Reports	Settings	
My Upcoming Events Add Event Goto To	<u>iday</u>						
Recent: Software Developer Directi caption D	ustin Testing Cand	idate B Lastname					
🔟 Calendar							
Calendar: October 2016							
My Upcoming Events / Calls	Day Week	Month		October 20	16	*	
	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
						1	2
	3 2 Events	4 01:00 AM return call to nm - John Brown	5 🥌 tesing - John Brown	6 01:00 AM test - John Brown	7 08:00 PM Video with the big boss - John Brown	8 09:00 AM junior dev - John Brown	9
	10 06:00 PM Meeting with Jose - John Brown	11 09:30 AM entrevita especifica - John Brown	12 08:00 AM	13 2 Events	14 09:00 AM Meeting with Major client - John Brown	15 03:00 PM 2 Orientation - John Brown	16
	17	18	19	20	21	22	23
	24	25	26	27	28	29	30
	31						

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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.

11.9 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.

		s Companies Contacts	Lists Cale	endar Reports Settings	
cent: Business Development. pm v		toget and and adad			
cent. Business Development. pm v	······································				
Reports					
Meports					
Reports					
(cports)					
Today		Yesterday		This Week	
New Job Orders	2	New Job Orders	3	New Job Orders	5
New Candidates	0	New Candidates	0	New Candidates	0
New Companies	1	New Companies	2	New Companies	3
New Submissions	0	New Submissions	0	New Submissions	0
New Placements	0	New Placements	0	New Placements	0
New Contacts	0	New Contacts	0	New Contacts	0
Last Week		This Month		Last Month	
New Job Orders	5	New Job Orders	16	New Job Orders	20
New Candidates	7	New Candidates	15	New Candidates	22
New Companies	2	New Companies	6	New Companies	9
New Submissions	5	New Submissions	7	New Submissions	1
New Placements	3	New Placements	3	New Placements	2
New Contacts	0	New Contacts	0	New Contacts	6
This Year		Last Year		To Date	
New Job Orders	41	New Job Orders	0	Total Companies	18
New Candidates	49	New Candidates	0	Total Candidates	49
New Companies	17	New Companies	0	Total Job Orders	41
New Submissions	8	New Submissions	0	Total Submissions	8
New Placements	7	New Placements	0	New Placements	7
New Contacts	7	New Contacts	0	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.

11.10 Settings Screen

There isn't much to the settings screen.

inistration My Profile Down	<u>oads</u>
ent: Finance Assistant Web Develo	oper Resume Information Technolo ACCOUNTANT SAMPLE ELECTRICAL ENGINEER
Settings: My Profile	2
- counigor my ritem	·
ofile	
View Profile	View your current profile to verify your information is correct.
Change Password	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.

CHAPTER 12

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

	encen. online.								CATS A	dministrato	r <admi< th=""><th>in> (testdon</th><th>(nain.com) Adm</th><th>D Logour</th></admi<>	in> (testdon	(nain.com) Adm	D Logour
Dashboard	Activities	Job Orders	Candidates	Companies	Conta	acts Li	sts	Calend	lar	Reports		Settings		
									Qu	iick Searc	h:			Go
My Recen	t Calls			My Upcoming) Calls	S			My Up	coming	Even	ts		
Recent H	ires				Hir	ring Overvie	w							
Name	Company	Re	ecruiter	Date									Weekly	
					1								Monthly	
													Yearly	
) D /				04/25 - 05/01	05/02	- 05/08	05/0	9 - 05/15		/16 - 05/22	Interv Hires	issions iews
Importan	t Candidate	s (Submitted	l, Interviewi	ing, Offered in	Active	e Job Order	s) - Pag	e 1 (0 I	(tems)					
First Name	Last N	ame State	us Po	osition				Com	pany				Modified	
				N	D	DA	FA							

12.1 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.

12.2 Add a new Company

Click on Companies

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

Ope	enca	ats					CATS Ac	Iministrator <ad< th=""><th>min> (testdomaii</th><th>Logon Logon (Administrato</th></ad<>	min> (testdomaii	Logon Logon (Administrato
Dashboard	Activities	Job Orders	Candidates	Companies	Contacts	Lists	Calendar	Reports	Settings	
Add Company	Search Corr	panies <u>Go</u>	To My Company							
Recent: Java p	rogrammer Con	npany ABC					Qu	ick Search:		Go
	panies: Ho s - Page 1 (2						□ c	only My Compa	anies Onl	y Hot Companies er Page Filter
🖽 Na	me			Jobs	City	State	Phone	Owner	Created	Modified
Cor	mpany ABC			1	New York	New York	555-555-1212	CATS A.	05-21-16	05-21-16
Interview	ernal Postings								11-19-09	11-19-09
Action							ABCDEF	GHIJKLM	NOPQRST	UVWXYZ ALL

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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

100

open. onli	cats					CATS	Administrator <a< th=""><th>dmin> (testdoma</th><th>Logout ain.com) Administrator</th></a<>	dmin> (testdoma	Logout ain.com) Administrator
Dashboard Activitie	s Job Orders	Candidates		Contacts	Lists	Calendar	Reports	Settings	
Add Company Searc	h Companies Go	To My Company							
Recent: Java programme	Company ABC						Quick Search:		Go
💷 Companies	: Add Comp	any							
Basic Information									
Company Name:			_	Cut a	nd paste freeform	n address here.			
Primary Phone:									
Secondary Phone:			<						
Fax Number:									
Address:							1		
City:									
State:									
Postal Code:		Loo	kup						
Web Site:									
Departments:	No Departments	•							
Hot Company:									
Other									
Key Technologies:									
Misc. Notes:									
Add Company Re	set Back to Con	npanies							



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.

ope	Logou CATS Administrator <admin> (testdomain.com) Administrator</admin>
Dashboard	Activities Job Orders Candidates Companies Contacts Lists Calendar Reports Settings
Add Company	Search Companies Go To My Company
Recent: Java prog	grammer Company ABC Quick Search: Go
	anies: Add Company
Basic Inform	nation
Company Name	
Primary Phone:	: Bob's Company 1234 Nowhere Lane
Secondary Pho	one: Philadelphia, PA 12345 web site: www.bobscompany.com
Fax Number:	Phone: 555-555-1215 Fax:555-555-1212
Address:	
City:	
State:	
Postal Code:	Lookup
Web Site:	
Departments:	No Departments
Hot Company:	
Other	
Key Technologi	ies:
Misc. Notes:	
Add Company	Reset Back to Companies

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

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

Click Add Company

oper open. o	Logout CATS Administrator <admin> (testdomain.com) Administrator</admin>
Dashboard Acti	vities Job Orders Candidates Companies Contacts Lists Calendar Reports Settings
Add Company	arch Companies Go To My Company
Recent: Java program	mmer Company ABC Quick Search: Go
風 Compan	ies: Add Company
Basic Informat	lon
Company Name:	Bob's Company 🛓 • Cut and paste freeform address here.
Primary Phone:	Bob's Company 555-555-1215 1234 Nowhere Lane
Secondary Phone:	Philadelphia, PA 12345 www.bobscompany.com
Fax Number:	555-555-1212 Phone:555-555-1215 Fax: 555-555-1212
Address:	1234 Nowhere Lane
City:	Philadelphia
State:	PA
Postal Code:	12345 Lookup
Web Site:	www.bobscompany.com
Departments:	No Departments
Hot Company:	
Other	
Key Technologies:	Java, python, windows
Misc. Notes:	Makes doors and windows for Bob and his friends
Add Company	Reset Back to Companies

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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.

ashboard Activities Job Orders Candidates Companies Contacts Lists Calendar Reports Settings dd Company Search Companies Go To My Company Go To My Company Guick Search: Quick Search: Quic	First Name	Last Name	Title	Departmen	t W	ork Phone	Ce	Il Phone	Created	Owner	Action
dd Company Search Companies Go To MV Company ecent: Bob's Company Java programmer Company ABC Quick Search: Companies: Company Details 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 Owner: Attachments: Add Attachment Makes doors and windows for Bob and his friends Edit © Delete O View History											
add Company Search Companies Go To My Company accent: Bob's Company Java programmer Company ABC Companies: Company Details Company Details 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 Attachments: Makes doors and windows for Bob and his friends Conders			ту	pe Status	Created	Modifie	a Start	Age	S P Reci	utter Owner	Action
Id Company Search Companies Go To My Company scent: Bob's Company Java programmer Company ABC Quick Search: Image: Company Details Name: Bob's Company ▼ Primary Phone: 555-555-1215 Secondary Phone: 555-555-1212 Pax Number: 555-555-1212 1234 Nowhere Lane Created: 05-24-16 (06:37 AM) (CATS Administrator) Philadelphia, PA 12345 Owner: CATS Administrator Attachments: Add Attachment Makes doors and windows for Bob and his friends Edt © Delete View History			-	Chatter	Createri	Made	al Direct		0 D D	uitan Ourra	A still a
dd Company Search Companies Go To My Company ecent: Bob's Company Java programmer Company ABC Quick Search: Quick Search: Quick Search: Quick Search: Quick Search: Quick Search: Quick Search: Quick Search: Quick Search: Philagelphia, PA 12345 Attachments: Makes doors and windows for Bob and his friends	ob Orders										
dd Company Search Companies Go To My Company ecent: Bob's Company Java programmer Company ABC Quick Search: Quick Search: Quick Search: Quick Search: Quick Search: Quick Search: Quick Search: Primary Phone: 555-555-1215 Secondary Phone: 555-555-1215 Secondary Phone: 555-555-1212 Address: Philadelphia, PA 12345 Attachments:	Edit 🤤 Delete	e 🛛 🔞 View History									
dd Company Search Companies Go To My Company ecent: Bob's Company Java programmer Company ABC Quick Search: Quick Search: Quick Search: Quick Search: Quick Search: Quick Search: Quick Search: Quick Search: Search Primary Phone: 555-555-1215 Secondary Phone: Fax Number: 555-555-1212 Address: 1234 Nowhere Lane Philadelphia, PA 12345	lisc. Notes:	Makes doors an	d windows f	or Bob and his t	friends						
dd Company Search Companies Go To My Company ecent: Bob's Company Java programmer Company ABC Quick Search: Quick Search:	Attachments:	R Add Attachm	ent 🔶								
dd Company Search Companies Go To My Company ecent: Bob's Company Java programmer Company ABC Quick Search: Quick Search: Quick Search		Philadelphia, PA	12345								
dd Company Search Companies Go To My Company ecent: Bob's Company Java programmer Company ABC Quick Search: [] Image: Company Details Bob's Company ▼ Billing Contact: [] Name: Bob's Company ▼ Billing Contact: [] Primary Phone: 555-555-1215 Web Site: http://www.bobscompany.com/ Secondary Phone: 555-555-1212 Created: 05-24-16 (06:37 AM) (CATS Administrator)	Address:	1234 Nowhere L	ane 🕺			Own	er:	CATS Ad	ministrator		
Add Company Search Companies Go To My Company ecent: Bob's Company Java programmer Company ABC Quick Search: Quick Search: Companies: Company Details Billing Contact: Primary Phone: 555-555-1215										TS Administrator)	
dd Company Search Companies Go To My Company accent: Bob's Company Java programmer Company ABC Quick Search: Quick Search: Companies: Company Details Name: Bob's Company → Billing Contact:						Key	Technologies:	Java, pyt	hon, windows		
dd Company Search Companies Go To My Company accent: Bob's Company Java programmer Company ABC Quick Search: Quick Search: Companies: Company Details	Primary Phone:	555-555-1215				Web	Site:	http://www	w.bobscompany	.com/	
dd Company Search Companies Go To My Company ecent: Bob's Company Java programmer Company ABC Quick Search: Quick Search: Companies: Company Details	Name:	Bob's Company	/ -			Billin	g Contact:				
dd Company Search Companies Go To My Company ecent: Bob's Company Java programmer Company ABC Quick Search:	Company Detail	s									
dd Company Search Companies Go To My Company ecent: Bob's Company Java programmer Company ABC Quick Search:			Details	;							
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ashboard Activities Job Orders Candidates Companies Contacts Lists Calendar Reports Settings	d Company Sea	arch Companies	Go To My Co	ompany .							
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open. online. free. CATS Administrator <administrator <a="" <administrator="">dministrator <administrator <a="" <administrator="">dministrator <amministrator <amministr<="" <amministrator="" td=""><td>open, o</td><td>nline, free,</td><td></td><td></td><td></td><td></td><td></td><td>CAT</td><td>S Administrator «</td><td>admin> (testdomain.)</td><td>com) Administra</td></amministrator></administrator></administrator>	open, o	nline, free,						CAT	S Administrator «	admin> (testdomain.)	com) Administra

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12.3 Add a new Contact

Next let's add a Company Contact.

Click Add Contact at the bottom of the current screen.

Open. on			Lo CATS Administrator <admin> (testdomain.com) Administra</admin>
ashboard Activiti		ts Lists	Calendar Reports Settings
dd Company Sear	ch Companies Go To My Company		
ecent: Bob's Company	Java programmer Company ABC		Quick Search: Go
	s: Company Details		
Company Details			
Name:	Bob's Company 🗸	Billing Contact:	
Primary Phone:	555-555-1215	Web Site:	http://www.bobscompany.com/
Secondary Phone: Fax Number:	555-555-1212	Key Technologies:	Java, python, windows
rax number: Address:	~	Created: Owner:	05-24-16 (06:37 AM) (CATS Administrator) CATS Administrator
Address.	1234 Nowhere Lane	Owner:	CATS Administrator
	Philadelphia, PA 12345		
Attachments:	R Add Attachment		
Misc. Notes:	Makes doors and windows for Bob and his friends		
🖻 Edit 🛛 🥥 Delete	O View History		
Job Orders			
ID Title	Type Status Created M	Nodified Start	Age S P Recruiter Owner Action
🛅 Add Job Order			
Contacts			
First Name	Last Name Title Department Work	Phone Cell F	Phone Created Owner Action
🖪 Add Contact 🛛 🔫			

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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.

open. or	nline. free.								JAIS A	aminis	strator <admin< th=""><th>> (testdomain.co</th><th>om) Administr</th></admin<>	> (testdomain.co	om) Administr
ashboard Activ	ities Job Ord	ers Can	didates	Compa	nies Co	ntacts	Lists	Calenda	ar	Rep	oorts	Settings	
dd Company Sea	rch Companies	<u>Go To My</u>	Compa	ny									
ecent: Bob's Compar	iy Java programm	er Company	ABC						Q	uick S	earch:		G
	_												
📠 Compani	es: Compar	iy Detai	s										
Company Detail	ç												
						5.00							
Name:	Bob's Compa 555-555-1215	-				Billing Co Web Site		hite of the					
Primary Phone: Secondary Phone:	555-555-1215										mpany.com/		
Fax Number:	555-555-1212					Key Tech Created:	-		bython,		ows M) (CATS Ad	ministrator)	
Address:						Owner:			Admini			ministrator)	
Addross.	1234 Nowhere	e Lane 🔀				Owner.		OAIO	Authin	istrate	<i>n</i>		
	Philadelphia,	PA 12345											
Attachments:	Add Attack	ment											
Misc. Notes:	Makes doors	and window	s for Bo	b and his fr	iends								
🛃 Edit 🛛 🥥 Delete	e 🔞 View Histo	лу											
Job Orders													
ID Title			Туре	Status	Created	Modified	Start	Age	S	Р	Recruiter	Owner	Action
🛅 Add Job Order													
Contacts													
First Name	Last Name	Title	De	partment	Wo	rk Phone		Cell Phone		Cr	eated	Owner	Action
Bob 🖌	Browning	CEO			555	-555-1212 x 1		555-555-121	4	05	24-16	CATS A.	🖂 📝

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12.4 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:

Ope		ats					CA	TS Administrator	<admin> (testdom</admin>	Logout
Dashboard	Activities	Job Orders	Candidates	Companies	Contacts	Lists	Calendar	Reports	Settings	
Add Job Order	Search .	Job Orders								
Recent: Bob's C	company Ja	ava programmer C	ompany ABC					Quick Search:		Go
🗐 Job (Orders:	Add Job O	rder							
Add a new	job order	to the system								
Title:			•	Start Date:		None 🗸				
Company:	E	Bob's Company	*	Duration:						
Department:			-	Maximum R	ate:					
Contact:		None	-	Туре:	ŀ	H (Hire)	<u> </u>			
City:	F	Philadelphia	*	Salary:						
State:	F	PA	*	Openings:	1		*			
Recruiter:		Administrator, CA		Company Jo	ob ID:					
Owner:		Administrator, CA	TS 🚽*	Hot:	(
				Public:	(
Description:					1		d 1010	•		
		B I ABC	二 第 第 1			u 🗛 • 🖉	V 77 =)	(2		
Internal Note										
internal Note:	».	B I AB€ ⋮Ξ	日津津	E = 1 =	eə 💥	<u>u</u> 🔺 - 🖉	💞 <u>Ω</u> 🤊	C		
Add Job Ord	der Re	set Back to .	lob 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. It 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.

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
Recent: Bob's Company Java programmer Company ABC Quick Search: Job Orders: Add Job Order Add a new job order to the system.	Go
Job Orders: Add Job Order Add a new job order to the system. Title:	00
Title: + Start Date:	
None V	
Company: Bob's Company	
Department: Maximum Rate:	
Contact: None Type: H (Hire)	
City: Philadelphia * Salary:	
State: PA • Openings: 1 •	
Recruiter: Administrator, CATS - Company Job ID:	
Owner: Administrator, CATS · Hot:	
Public:	
Description: B I Asc $[] \equiv [] \equiv [] \equiv [] \equiv [] \equiv [] = [] [] [] = [] = [] = [] [] [] [] [] [] [] [] [] [] [] [] [] $	
Add Job Order Reset Back to Job Orders	

CATS Version 0.9.2 Diablo. Powered by CATS. Server Response Time: 0.05 seconds. © 2005 - 2007 Cognizo Technologies, Inc.

Click Add Job Order

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This will take you to your new Job Order screen.

open	cats		① Logout
open. onli	ine. free.		CATS Administrator <admin> (testdomain.com) Administrator</admin>
Dashboard Activitie	Job Orders Candidates Companies Conta	acts Lists	Calendar Reports Settings
Add Job Order Sea	irch Job Orders		
Recent: IT Administrato	r Bob's Company Java programmer Company ABC		Quick Search: Go
Job Orders	: Job Order Details		
Job Order Details	5		
Title:	IT Administrator 📟 🗸	Duration:	Direct Hire
Company Name:	Bob's Company	Openings:	1
Department:		Туре:	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		
Contact Email:	bob@bobscompany.com	Days Old:	0
Location: Max Rate:	Philadelphia, PA 80000	Created:	05-24-16 (08:20 AM) (CATS Administrator)
Salary:	up to 80000	Recruiter:	CATS Administrator
Start Date:	ap 10 00000	Owner:	CATS Administrator
Attachments:	& Add Attachment		
Description:			
	IT Administrator		
	May 10, 2016 - June 10, 2016		
	May 10, 2010 - June 10, 2010		
	Location:Ponte Vedra Beach, FL		
	Salary Range:\$53,000		
	Exempt/Non-Exempt:Exempt		
Internal Notes:	Everything BUT this box will be visible on your		Job Order Pipeline
	public job board (If you decide to activate it)		
			Cand Replied Submitted Offered Placed
		Contacte	
🤯 Edit 🛛 🥥 Delete	-		Jenerate Report 🛛 🔞 View History
Candidate Pipelin	le		
Match	First Name Last Name Loc Added B	Entered By Status	Last Activity Action
Export 💩 Ad	Id Candidate to This Job Order Pipeline		



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

12.5 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.

onon	rate			Logout
open, onli	ne. free.		CATS Administrator <admin> (testdomain.com) A</admin>	dministrator
Dashboard Activitie	Job Orders Candidates Companies Conta	cts Lists	Calendar Reports Settings	
Add Job Order Sea	rch Job Orders			
Recent: IT Administrato	r Bob's Company Java programmer Company ABC		Quick Search:	Go
Job Orders	: Job Order Details			
Job Order Details	:			
Title:	IT Administrator 🔜 🚽	Duration:	Direct Hire	
Company Name:	Bob's Company	Openings:	1	
Department:		Туре:	Hire	
CATS Job ID:	2	Status:	Active	
Company Job ID:	IT-1	Pipeline:	0	
Contact Name:	Bob Browning			
Contact Phone:	555-555-1212 x 1	Submitted:	0	
Contact Email:	bob@bobscompany.com	Days Old:	0	
Location:	Philadelphia, PA 80000	Created:	05-24-16 (08:20 AM) (CATS Administrator)	
Max Rate: Salary:	up to 80000	Recruiter:	CATS Administrator	
Start Date:		Owner:	CATS Administrator	
Attachments:	& Add Attachment			
Description:	Add Attachment			
	IT Administrator			
	May 10, 2016 - June 10, 2016			
	may 10, 2010 - June 10, 2010			
	Location:Ponte Vedra Beach, FL			
	B-1 B 650.000			
	Salary Range:\$53,000			
	Exempt/Non-Exempt:Exempt			
Internal Notes:	Everything BUT this box will be visible on your		Job Order Pipeline	
	public job board (If you decide to activate it)		our order ripeare	
		Total Pipeline (and Replied Submitted Offered F	laced
		Contacte	d Qualifying Interviewing Declined	
📝 Edit 🛛 🥥 Delete	🔍 Administrative Hide		👪 Generate Report 🛛 🔞 Vi	ew History
Candidate Pipelin	e			
Match	First Name Last Name Loc Added E	Entered By Status	Last Activity Acti	ion
🔲 Export & Ad	d Candidate to This Job Order Pipeline 🛛 🗲			

CATS Version 0.9.2 Diablo. Powered by CATS. Server Response Time: 0.05 seconds. © 2005 - 2007 Cognizo Technologies, Inc.

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open. on ashboard Activit	Job Orders Candidates Companies Cont	acts Lists	CATS Administrator <	Logout Imin> (testdomain.com) Administrator Settings	
dd Job Order <u>Se</u> ecent: IT Administrat	arch Job Orders or Bob's Company Java programmer Company ABC		Quick Search:	Go	
Job Order	s: Job Order Details				
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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:		Add Candidate to This Job Order Pipe	aline
Contact Name:	Bob Browning	1 C C C C C C C C C C C C C C C C C C C		and oundidate to This oob order Pipe	
Contact Phone:	555-555-1212 x 1	Submitted:	0	Search for a candidate below and then click on the co	andidate's first or last name to add the selected candidate to the job order
Contact Email:	bob@bobscompany.com	Days Old:	0	pipeline.	and and a marker of the red of the serviced candidate to the job ofder
Location:	Philadelphia, PA	Created:	05-24-16 (08:20 AM)		
Max Rate: Salary:	80000 up to 80000	Recruiter:	CATS Administrator	Search by Full Name:	•
Start Date:	up to 80000	Owner:	CATS Administrator	Search by Full Name	
Attachments:	Add Attachment				
Description: Internal Notes:	IT Administrator May 10, 2016 - June 10, 2016 Location:Ponte Vedra Beach, FL Salary Range:\$53,000 Exemptive:Exempt Exemptive:Exempt Everything BUT this box will be visible on your public job board (if you decide to activate it)] [Job Order P	Add Candidate	
		Total Pipeline	Cand Replied Submitted	Offered Placed	
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Candidate Pipeli	ne				
Match	First Name Last Name Loc Added	Entered By Status	s Last Activity	Action	
Export & A	dd Candidate to This Job Order Pipeline				

Then Add Candidate.

CATS Version 0.9.2 Diablo. Powered by CATS. Server Response Time: 0.05 seconds. © 2005 - 2007 Cognizo Technologies, Inc.

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

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

	arch Job Orders					
cent: IT Administrat	or John Doe Java programmer Bob's Co	mpany Company A	ABC .	C	luick Search:	Go
Job Order	s: Job Order Details					
lob Order Detai	ls					
ïtle:	IT Administrator 🔜 🗸		Duration:	Direct Hi	re	
ompany Name:	Bob's Company		Openings:	1		
epartment:			Туре:	Hire		
ATS Job ID:	2		Status:	Active		
ompany Job ID:	IT-1		Pipeline:	1		
ontact Name:	Bob Browning		Submitted:	0		
ontact Phone: ontact Email:	555-555-1212 x 1					
ontact Email: ocation:	bob@bobscompany.com Philadelphia, PA		Days Old:	0		
lax Rate:	80000		Created:		6 (08:20 AM) (CATS Administrator)
alary:	up to 80000		Recruiter:	CATS A	dministrator	
tart Date:			Owner:	CATS A	dministrator	
ttachments:	R Add Attachment					
escription:						
	IT Administrator May 10, 2016 - June 10, 2016					
	Location:Ponte Vedra	Beach, FL				
	Salary Range:\$53,000					
	Exempt/Non-Exempt:Exempt					
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PEdit 👄 Delet Candidate Pipeli Matci	public job board (If you decide to a		100% Total Pipeline (Contacte	d Qua	lifying Interviewing Decl	

Success! We have a candidate in the pipeline!

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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.

CHAPTER 13

OpenCATS Backup/Restore and Upgrade Instructions-THIS SECTION INCOMPLETE!

The backup/restore and Upgrade processes are the same.

13.1 Backup/Restore best practices and things to consider

Any critical business software needs a backup and restore process in case of disaster. There are a few different ways to backup and restore your OpenCATS Applicant Tracking system. A few things to consider when setting your backup strategy: How often should you perform backups? How often should you test your backups? Where will you store your backups? Will you automate your backup process?

This documentation will not cover these things, except the backup testing, but they should considered in case something ever happens to your OpenCATS system.

13.2 About this documentation/different environments

We will cover two different ways to backup and restore your OpenCATS system.

- GUI: Graphical User Interface (Point and click). Built in to the OpenCATS system.
- Non-GUI: A more typical, systems administrator approach to backup and restoring.

We will cover the different steps for:

- Windows environment
- · Shared-hosting environments
- Linux/VPS environments

13.3 Pros and Cons: GUI vs. Non-GUI

- The GUI, when it works, is far easier for non-technical users.
- As far as I know, the GUI backup works in OpenCATS versions 0.9.1, 0.9.1a, and 0.9.4. I don't think it works in any of the other versions. It is certainly worth a try if you want to.
- Downloading the GUI generated backup file (catsbackup.bak) on certain shared hosting environments can also involve a few additional steps.
- While the GUI backup restore process looks very simple, in my experience, the Non-GUI process is the simpler, and far more consistent way to go.

13.4 GUI (Graphical, point and click)

OpenCATS has backup and restore functionality built in. It works in versions 0.9.1, 0.9.1a, and 0.9.4. I'm not sure about the versions in between.

ope	ncat	S						CATS Professional Account Login John Anderson <john@mycompany.net> (MyCompany.NET) Admini</john@mycompany.net>
Dashboard	Activities Job	Orders Candidates	Companies Contacts	Lists	Calendar Reports	Settings		
December 16 (1997) Th								
Recent: Kristin Th	iomas							Quick Search:
My Recent Cal	lls			My Upp	oming Calls		My Upcoming Events	
,								
Recent Hires							Hiring Overview	
		_						
Name		Company		Recruiter		Date		Weekly
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	iaidates (Sabinitt			T (5 items)				
First Name		Last Name	Status		Position		Company	Modified 01-17-07
& Kristin		Thomas	Submitted		HR Manager		McDonalds	01-17-07 01-17-07
& Sherry		Johnson	Submitted		Cisco Specialist		Best Buy	
& Robert		Burton	Offered		Marketing Specialist		McDonalds	01-17-07
& Teresa		Atnip	Interviewing		Marketing Specialist		McDonalds	01-17-07
& Maria		Gregg	Interviewing		Marketing Specialist		McDonalds	01-17-07
							3 Version 0.9.4 Countach, Powered by CATS.	
						C	s version 0.3.4 Countach, Powered by CALD.	

Server Response Time: 0.04 seconds. © 2005 - 2007 Cognizo Technologies, Inc.

GUI Backup:

From the main screen:

- Click: Settings
- Click: Administration
- Click: Site Backup

opencats
Dashboard Activities Job Orders Candidates Companies Contacts Lists Calendar Reports Settings
Administration My Profile
Recent: Kristin Thomas
💊 Settings: Site Backup
Create Site Backup
Create a backup of your entire CATS database (including all of your attachments). Note: Only one backup of your database can be stored on the server at a time. Creating a new backup will delete the previous backup.
Last backup:
None
Create Full System Backup
Create Attachments Backup

Note: Create Attachments backup will backup all the attachments in your OpenCATS system and allow you to export them for storage or redundancy. This **WILL NOT** allow you to restore your OpenCATS database if you need to recover your OpenCATS system or upgrade in the future.

Click: Create Full System Backup

This will backup your entire OpenCATS ATS (attachments and database).

Depending on the database size, this may take a few minutes. Let it finish and you should return to this screen with a downloadable link for catsbackup.bak

	192.168.0.9 says:
opencats	Backup Complete!
Dashboard Activities Job Orders Candidates Companies Contacts Lists Calendar Repo	ОК
Administration My Profile	
Recent: Kristin Thomas	
😪 Settings: Site Backup	
Create Site Backup	
Create a backup of your entire CATS database (including all of your attachments). Note: Only one backup of your database can be stored on the server at a time. Creating a new backup will delete the pr Backing up database, please wait (Now would be a good time to take a coffee break!) Status:	revious backup.

CATS Version 0.9.4 Countach. Powered by CATS.

Dashboard	Activities	Job Orders	Candidates	Companies	Contacts	Lists	Calendar	Reports	Settings
	My Profile								
Recent: Kristin	Thomas								
Q Setti	ings: Site	Backup							
Create Site I	Backup								
Note: Only Last backu	one backup p: KB) catsback	r entire CATS (of your databa (up.bak 07-04-1 lownload the ba	se can be stor 7 (10:26:31 AM	ed on the serv			ew backup will d	lelete the previo	ous backup.
	e Full System I Attachments								

Click the link, the file will download to your local computer. You can store it wherever you like if you need to recover your opencats system in the future.

GUI Restore

Go through the normal installation process for your environment. Do the following before you get to the final, GUI portion of the installation.

Create a directory called "restore" in the main OpenCATS directory.

Note: If you're using a VPS, or linux environment, make sure the directory permissions are writable. Refer to the "directory or file permissions section" and match the permissions of the uploads and attachments folders.

Move the backup file that you want to restore into the newly created restore directory.

Note: When you create/save/store backup files, you can rename them however you want. When you restore from a backup file, it MUST be named catsbackup.bak. Make sure the name is correct before attempting the restore. OpenCATS won't recognize any other file name/type.

Referring to the "Install the OpenCATS software" section of the installation walkthrough, on "Step 3: Loading Data", choose the Restore installation from backup option.



Step 1: System Check	Loading Data - Empty Database
Step 2: Database Connectivity	The installer is ready to set up your OpenCATS data. Please pick the way you want the installer to set up OpenCATS:
Step 3: Loading Data	
	New Installation (Recommended)
Step 4: Setup Resume Indexing	Demonstration Installation
Step 5: Mail Settings	Restore Installation from Backup
Step 6: Loading Extras	You can always run the installer again to clear the database and choose a different option.
Step 7: Finishing Installation	Next>
Restart Install]

It will ask you to confirm that you have uploaded the catsbackup.bak file into the restore directory. Check the box and click continue.



Step 1: System Check	Loading Data - Restore from Backup
Step 2: Database Connectivity	The installer is ready to restore your backup.
Step 3: Loading Data	Please upload the file catsbackup.bak into the restore directory. The installer will load the data out of
Step 4: Setup Resume Indexing	the catsbackup.bak and set up your site accordingly, and then it will delete the file (preventing unauthorized access to the backup file).
Step 5: Mail Settings	I have uploaded the file catsbackup.bak into the restore directory.
Step 6: Loading Extras	Continue
Step 7: Finishing Installation	
Restart Install	1

The rest of the installation should be normal.

This will put you into a newly restored OpenCATS system.

Note: As with any new OpenCATS installation, it will tell you the username and password is admin/admin. It is NOT. You will need the username and password from the prior OpenCATS installation that you restored.

13.5 Non-GUI

The Non-GUI Backup/Restore steps are actually relatively simple. Again, we need to backup the OpenCATS attachments and database, then restore them.

- Attachments-This is where all our documents, CVS, resumes, etc are stored.
- Database-This is all the information that the OpenCATS system uses.

Environments:

- · Shared hosting
- Command line
- Windows

Backup storage organization and file structure.

If you back up daily, you will need to consider some sort of way to organize your backup files. The Non-GUI approach will produce two files per backup (catsdatabasename.sql and attachments.zip). This is an example file/directory structure that I use.

Directory: OpenCATS Backup files

Sub-Directory: 7-1-17

- Attachments.zip
- opencats.sql

Sub-Directory: 7-2-17

- Attachments.zip
- opencats.sql

Sub-Directory: 7-3-17

- Attachments.zip
- opencats.sql

etc.

Database Backup

Windows/Shared-hosting: Log in to phpmyadmin. Refer to the installation instructions, under the php or phpadmin sections, to get there.

php <mark>MyAdmin</mark> গ্রন্থ ৩ ৩ জ জ	- Clevers locator	es 🚆 Charsets 🕞 Engines 🐊 Plugins			
Recent Favorites	General settings	Database server			
925	Grange password	Server: Localhost via UNIX socket Server type: MariaDB			
information_schema imal	Server connection collation : utRmb4_unicode_cl	Server version: 5.5.51-MariaDB - MariaDB Server Protocol version: 10			
e_a mysql e_a nextcloud	Appearance settings	User: root@localhost Server charset: UTF-8 Unicode (utf8)			
e ocdyag		Web server			
octest performance_schema	Congrego (): English	Apache			
province performance_series and a series and a serie	Font size: 82%	Database client version: libmysql - mysqlnd 5.0.11.dev - 20120503 - \$id: 76b08b24596e12d4553bd41fc93cccd5bac2fe7a \$ P PIP extension: mysql @ cut @ mbstring @			
simpleinvoices simpleinvoices2		PHP version: 5.6.30			
e_a test		phpMyAdmin			
		Version information: 4.6.3, latest stable version: 4.7.2 Documentation Official Homepage Contribute Get support List of changes License			
	A newer version of phpMy/Admin is available and you should consider upgrading. The newest version is 4.7.2, released on 2017-06-29.				
	The phylhyldmin configuration storage is not completely configured, some extended features have been deactivated. <u>Find out why</u> . Or alternately go to 'Operations' tab of any database to set it up there.				
		5			

In the column, on the left side, you should see a list of your MySQL/MariaDB databases. Click on the name of your OpenCATS database. You should then see the following screen:

php MyAdmin	Server: localhost » 🕤 Database: octes			
<u>Ω 5 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 </u>	M Structure SQL Search	Query Export Import Operation	ns 📑 Privileges 🖓 Routines 🕙 Events	s 🏁 Triggers 🧌 Designe
ecent Favorites	Table 🔺	Action	Rows 😡 Type Collation	Size Overhead
New	access_level	🌟 📑 Browse 📝 Structure 🍳 Search 👫 Insert 🚍 En	pty Orop 6 MyISAM utf8_unicode_ci	3.7 KiB -
Liii 925	activity	👍 🔲 Browse 🔐 Structure 👒 Search 👫 Insert 🗮 En	pty \ominus Drop 8 MyISAM utf8_unicode_ci	15 KiB -
information_schema	activity_type	👷 🗐 Browse 📝 Structure 👒 Search 👫 Insert 🚍 En	pty O Drop 7 MyISAM utf8_unicode_ci	3.1 KiB -
kimai mysql	attachment	👷 📑 Browse 🎉 Structure 🍕 Search 👫 Insert 🚍 En	pty O Drop 2 MyISAM utf8_unicode_ci	33.4 KiB -
nextcloud	calendar_event	🌸 🗐 Browse 🖟 Structure 🍕 Search 👫 Insert 🚍 En	pty O Drop 1 MyISAM utf8_unicode_ci	4.1 KiB -
ocdyag	calendar_event_type	🚖 🗐 Browse 🕼 Structure 👒 Search 😹 Insert 📟 Em	pty O Drop 6 MyISAM utf8 unicode ci	3.2 KiB -
ocdyag2	candidate	👷 🔲 Browse 🔐 Structure 👒 Search 👫 Insert 📟 Em		36.3 KiB -
octest		☆ I Browse M Structure Search M Insert I En		10.4 KiB -
L performance_schema				3.3 K18 -
La qnote	candidate_joborder_status	🚖 🗐 Browse 🙀 Structure 👒 Search 🕌 Insert 🚍 En	-	
simpleinvoices	candidate_joborder_status_history	🚖 📄 Browse 🥻 Structure 👒 Search 👫 Insert 👾 En		8.3 KiB -
simpleinvoices2	candidate_jobordrer_status_type	🚖 🗐 Browse 🙀 Structure 🍕 Search 🕌 Insert 🗮 En	pty O Drop ⁰ MyISAM utf8_unicode_ci	1 KiB -
test	candidate_source	🏫 🔲 Browse 🥻 Structure 👒 Search 🕌 Insert 🚍 En	pty Orop 1 MyISAM utf8_unicode_ci	3 KIB -
- vtiger - wordpress	career_portal_questionnaire	👷 📄 Browse 🙀 Structure 👒 Search 👫 Insert 🖷 En	pty O Drop 0 MyISAM utf8_general_ci	1 KiB -
zurmo	career_portal_questionnaire_answer	👷 📑 Browse 🥻 Structure 🧃 Search 🐉 Insert 🚍 En	pty 🥥 Drop 0 MyISAM utf8_general_ci	1 KiB -
	career_portal_questionnaire_history	🚖 🗐 Browse 🛃 Structure 👒 Search 👫 Insert 🚍 En	pty 😑 Drop ⁰ MyISAM utf8_general_ci	1 KiB -
	career_portal_questionnaire_question	n 👷 📄 Browse 🖟 Structure 👒 Search 👫 Insert 🚍 En	pty O Drop ⁰ MyISAM utf8_general_ci	1 KiB -
	career_portal_template	🌟 🗐 Browse 🙌 Structure 👒 Search 👫 Insert 層 En	pty O Drop 22 MyISAM utf8_general_ci	17.6 KiB -
	career_portal_template_site	🚖 🗐 Browse 🔐 Structure 🍕 Search 🙀 Insert 📟 Em	pty O Drop ⁰ MyISAM utf8_general_ci	1 KiB -
	company	👷 🗐 Browse 🔐 Structure 🍕 Search 👫 Insert 🚍 Em	pty O Drop 2 MyISAM utf8 unicode ci	16.3 KiB -
	company_department	🚖 🗐 Browse 🖟 Structure 👒 Search 👬 Insert 📟 Em		2.2 KiB -
	-			12.3 KiB -
	contact	👷 🔄 Browse 🛃 Structure 👒 Search 🕌 Insert 🏪 En		
	data_item_type	🚖 📄 Browse 🕅 Structure 👒 Search 👫 Insert 🗮 En		3.1 KiB -
	eeo_ethnic_type	🚖 🗐 Browse 🛃 Structure 🍕 Search 👫 Insert 🚍 En		2.1 KiB -
	eeo veteran_type	- 🌟 📄 Browse 🥻 Structure 🍕 Search 👫 Insert 🚍 En	pty Opp 4 MyISAM utf8_general_ci	2.1 KiB -

Click the Export tab towards the top, center. You should ten see the following screen:

php MyAdmin	🖷 🧖 Server: localhost » 🗑 Database: octest
<u> </u>	📝 Structure 📔 SQL 🔍 Search 🔃 Query 🚍 Export 📻 Import 🤌 Operations 🖭 Privileges 🛞 Routines 😒 Events 🏂 Triggers 🖧 Designer
Recent Favorites	
	Exporting tables from "octest" database
	Exporting tables non-occust database
925	
information_schema	Export method:
💼 kimai	Quick - display only the minimal options
i∎_i mysql	Quick adapting only use imminiate opports Quick adapting only use provides a set of the se
nextcloud	Custom uspay a posane opiona
• ocdyag	Format:
• ocdyag2	
+ octest	SQL T
performance_schema	
+ phproject	
qnote simpleinvoices	Go
simpleinvoices2	
+ test	
tiger	
+ wordpress	
+ zurmo	
<u> </u>	

Click Go. Phpmyadmin will generate the database backup file and you should automatically start downloading it.

The file will be named after your database name with an sql extension. Mine, in this case, was named octest.sql.

Make sure you move your file to a safe place.

Attachments backup

Restore non-gui In phpmyadmin: Select newly created database from list on the left Click import in the upper row browse select your opencatsdatabasebackup.sql file Scroll to the bottom and click "go"

Restore attachments

Install opencats

13.6 Automating a windows backup

http://forums.opencats.org/viewtopic.php?f=2&t=810&start=10

13.7 Testing your backups/Setting up a test environment to reuse

13.8 Changing your user passwords in phpmyadmin

Try this

Restore non-gui Create new database/user in phpmyadmin - Follow install documentation for this step if necessary

In phpmyadmin: Select newly created database from list on the left Click import in the upper row browse select your opencatsdatabasebackup.sql file Scroll to the bottom and click "go" Create user (follow steps from documentation)

Check for INSTALL_BLOCK file or folder in opencats directory Install opencats

Use existing OpenCATS installation and automatically preform any necessary upgrade (recommended).

Merge/overwrite old attachments folder into new Opencats attachments directory

In phpmyadmin: Create new database in phpmyadmin - Follow install documentation for this step if necessary Select newly created database from list on the left Click import in the upper row browse select your opencatsdatabase-backup.sql file Scroll to the bottom and click "go" Create user (follow steps from documentation) for the database and assign rights.

In NEW opencats directory Check for INSTALL_BLOCK file or folder in opencats directory Install opencats through browser

When you get to the intall type step (new, demo, restore, etc.) You should see: Use existing OpenCATS installation and automatically preform any necessary upgrade (recommended). Select that option.

That should work. Post back with any questions/issues.

CHAPTER 14

Short overview of original OpenCATS Source code

Note: This was written for the original source code. It may not apply completely to the current OpenCATS version

We have not used any outside frameworks. The OpenCATS framework is very light and conceptually simple to understand. This allows for modifications to be isolated, preventing, for example, a small change to a template from affecting library code, or a major change in database structure from requiring a change to every single page.

Let's have a look at the layout of the code OpenCATS is roughly divided into three parts:

- Modules
- Library Components
- Templates

Modules

A module is loosely related to the tabs you see in the GUI and consists of the user interface logic and one or more "templates" to render the HTML page. Some of the modules in OpenCATS are:

- Home
- Candidates
- Contacts
- Calendar, etc.

Browse the modules directory to see the all the current modules in OpenCATS. Each module has its own separate directory.

Library Components

Library components are PHP objects which encapsulate lower-level functionality, such as interfacing with a database, parsing addresses, sending e-mail, etc. For each module, there is a roughly corresponding library component (but not all libraries directly correspond to a module). Examples of some library components are:

• Candidates

- Search
- Users
- VCard
- AddressParser

Browse the lib/ directory to see the all different library components.

OpenCATS Page Request Flow

Every page request to OpenCATS goes through index.php, which acts as a "router" or delegator to the modules.

- A page request is sent to index.php
- index.php parses the URL and sends the request to the corresponding module (specified by m= in the URL) for further processing
- A module parses the "action" (specified by a= in the URL) and invokes the corresponding method within the module.
- The method processes the request, often using library components
- The function displays a template file, if necessary, and fills in the appropriate data and renders the HTML page

Every OpenCATS page request goes more or less through the above 5 steps.

OpenCATS URLs

OpenCATS URLs are designed to be intuitive and easy to use for developers:

E.g. HTTP://OpenCATS.org/index.php?m=clients&a=show&clientID=239 means:

- m = clients
- a = show
- clientID = 329

index.php sends the URL to the "clients" module. The clients module processes the action "show" for clientID 329. We want to display details of client 239.

Here is the basic layout of a module:

```
/* mymodule/MyModuleUI.php: */
1
   class MyModuleUI extends UserInterface
2
3
   {
   public function ____construct()
4
5
   parent::___construct();
6
   $this->_moduleDirectory = `mymodule';
7
8
   }
   public function handleRequest()
9
10
   $action = $this->getAction();
11
   switch ($action)
12
   {
13
   case 'myAction':
14
   $this->myAction();
15
   break;
16
17
   . . .
   }
18
19
   }
```

```
public function myAction()
{
    {
        ...
        }
    }
```

Templates

Modules, as mentioned above, contain the necessary code to render the HTML pages in OpenCATS. HTML is separated from the rest of the code via "templates". A page is displayed by a template by assigning variables to it using assign() and then call it's display() method.

```
1 public function myAction()
2 {
3 ...
4 
5 $this->_template->assign(`myVariable', $myValue);
6 $this->_template->display(`./modules/mymodule/MyTemplate.tpl');
7 }
```

To display a variable inside a template, use:

_(\$this->myVariable); ?>

Interfacing with the database is only done at the library level. This limits the effects that a change in the database structure can have on the upper layers of the code.

CHAPTER 15

F.A.Q. for OpenCATS applicant tracking system

Where can I try a demo version of OpenCATS?

We have a fully functional demo running at: OpenCATS Demo

This will allow you to test out the functionality, but will not allow you administrative rights/access.

What operating systems and environments will openCATS work with?

Any? We have install documentation and videos for Windows, various Linux distributions, and shared-hosting environments.

It will work on a MAC, Amazon EC2, a VPS, in Docker, heck, you can throw it on an OS-installed thumb drive and take it with you. I've also run it on a Synology NAS, so that's an option too.

OpenCATS can run on pretty much anything.

What's the catch? Is it really free?

YES! That's what open-source software is. If you're not familiar with open source software, have a read about it here: Open Source software

This is not freemium, there are no paid tiers, and no sales person will ever call you. This is open source software. Having said that, OpenCATS is a little lighter on features compared to the paid ATS's out there. Use it, enjoy, tell your friends.

Is is accessible over the internet?

If you want it to be, yes. If you don't, then it doesn't have to be. Basically, if you set it up on your local computer, it will be for that computer only. If you set it up so that's it is accessible on your network, or the internet, then it will be accessible on your network or over the internet and you can have as many users as you need.

What are the installation requirements for OpenCATS?

OpenCATS is L/WAMP software, so it requires Apache, MySQL/MariaDB and PHP to run. The specifics depend on the environment you want to install it on. See the installation instructions for more information.

Where is the documentation for OpenCATS?

You are looking at it! But in the event this is printed and handed to a recruiter in the remote desert some day, our documentation site is at: http://opencats-documentation.readthedocs.io/en/latest/

Can I backup and restore OpenCATS?

Absolutely. There are a few different ways to do this, including a GUI (non-technical) backup/restore. This is on the "to do" list for the documentation.

CHAPTER 16

Indices and tables

- genindex
- modindex
- search