



# User's Guide

OpenCATS 0.9.1

---

---

# User's Guide: OpenCATS 0.9.1

Document built from repository (revision: 8) at Fri Jul 26 15:30:03 PDT 2013

---

# Contents

1. Preface .....	1
What is this manual .....	1
Release information .....	1
Legal information .....	1
2. Introduction .....	2
OpenCATS vs CATSOne vs "open source" .....	2
General features .....	2
Recruiting cycle .....	3
Workflow .....	6
3. Installing and running OpenCATS .....	7
Requirements .....	7
Putting the software in place .....	7
A few things before you start .....	7
Starting up .....	7
4. Using OpenCATS .....	8
Overview .....	8
Handling customers .....	9
Handling talent .....	9
Reporting and exporting data .....	9
5. Configuring and administering OpenCATS .....	11
Managing users .....	11
Email and templates .....	11
Calendars .....	11
Backing up the OpenCATS database .....	11
Special tables .....	11
6. Customizing OpenCATS .....	12
Branding .....	12
Localization .....	12
Using extensions .....	12
Creating extensions .....	12
7. Further reading .....	13
Academic stuff .....	13
The user/developer community .....	13

---

# 1

## Preface

---

### 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.

### Release information

### Legal information

---

# 2

## Introduction

---

OpenCATS is a free, full-featured, web-based applicant tracking system, or ATS. It helps you manage the complete recruitment cycle from taking job orders and sourcing candidates through to candidate selection, submission, and hire. It manages a huge range of information for you, including:

- candidate details, qualifications, resumes, contact history
- job orders details, associated contacts, and the candidate pipeline for each
- multiple recruiters, sites, career portals, and much more

## OpenCATS vs CATSOne vs "open source"

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

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

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

The commercial CATS product is a highly polished, professionally supported, hosted software service. OpenCATS, on the other hand, has somewhat less functionality, is installed on *your* server(s), and is supported only by you -- with some help from the development community.

## General features

# Recruiting cycle

When recruiting for clients, the first part of the process is sales: there must be a client who needs to hire some candidate(s). When this happens, the recruiter gets a *job order* associated with that client. This job order is the major input into the recruitment process. The recruitment life cycle goes through three main phases: *search*, *evaluate*, and *place*. The following paragraphs describe these phases and their main activities.

## 1- Searching Phase.

This phase begins when a recruiter receives a request for a certain job order. He/she will search for matching candidates, nominate them to the *job pipeline* and start contacting them for approval to send their resume to the client for the specific post. This process produces an initial list of *nominated candidates*.

The recruiter (or in some cases a front office administrator or account manager) prepares a batch of the nominated candidates' resumes and sends them to the client for review.

After the client reviews the list, he/she will provide feedback about the suitability of the nominated candidates to the post he needs to fulfill. The output of the client's review process are two lists:

- A. Rejected list - This list should be used to avoid nominating similar candidates to the post again and understanding the reasons usually produces better results in later batches.
- B. Selected list - Also called the *interview scheduled list*. This list is used by the recruiter to schedule interviewing sessions between the client and the nominated candidates

## 2- Evaluation Phase.

After the initial round of the search phase, the evaluation phase starts. This phase encompasses many procedures where recruitment agencies differ in treatment.

In some cases, selected candidates may need to complete specific testing to ensure their suitability to the post. However, the highest ranking candidates from these tests may not be the ones selected. In many cases, more suitable candidates are considered due to home location, skills background, and other considerations that the client might see appropriate. In other countries, exams are not required to offer an interview. Considerations related to the current company, title, and job responsibilities are used to ensure quality interviews.

This phase starts by the recruiter calling the nominated candidates and scheduling interview dates by negotiating appropriate timings for both the client and the candidate. After completion, the recruiter sends the schedule to the client and confirms with him the details.

The client proceeds into interview sessions with the nominated candidates and produces two lists:

- A. Selected List - A list of accepted candidates that the client is willing to propose a job offer to.
- B. Rejected List - The list of candidates interviewed and were not selected for job offering

\

These two lists are different from the ones produced by the client at the end of the search phase. The candidates accepted by the client during the search phase are most probably suitable to the job but after the interview the client might reject the candidate and not find him suitable due to salary, location, nationality, language, skills or objective reasons. These reasons are very important to help aid further enhancements of the Search process.

### 3- Placement Phase.

After successful completion of the Evaluation phase, the Placement Phase begins. The recruiter starts by contacting the selected candidates and offering them the job offer presented by the Client. He will present the offer in full details of the location of the job, salary details, benefits, and in some cases relocation options.

After offering the candidate, the recruiter gathers feedback of the candidates opinion about the offer to help understand the suitability of the job to his career plans, and whether it is acceptable by him, or he needs to negotiate the offers terms.

The recruiter will then relay this information to the client and mediate between them until a suitable settlement is reached. It is important to say that most failure's to the recruitment process happens in this stage as the recruiter has to depend on his good understanding of both parties requirements and try to meet them by compromising and convincing both parties of the benefit and gain from accepting the offer or modifying it. In this stage the recruiter has to be on both sides with the Client and the Candidate to help reach a win-win situation between them.

During the negotiation process the candidate will The candidate will then either Accept or Reject the offer which will result in two lists.

- A. Accepted List - The list of candidates who accept and sign the offer.
- B. Rejected List - The list of candidates who reject the offer. This list should be studied well for reasons of rejection, as some reasons may result in not only losing the placement, but also losing the client as well.

Below is a diagram of a typical recruiting process and its candidate pipeline:

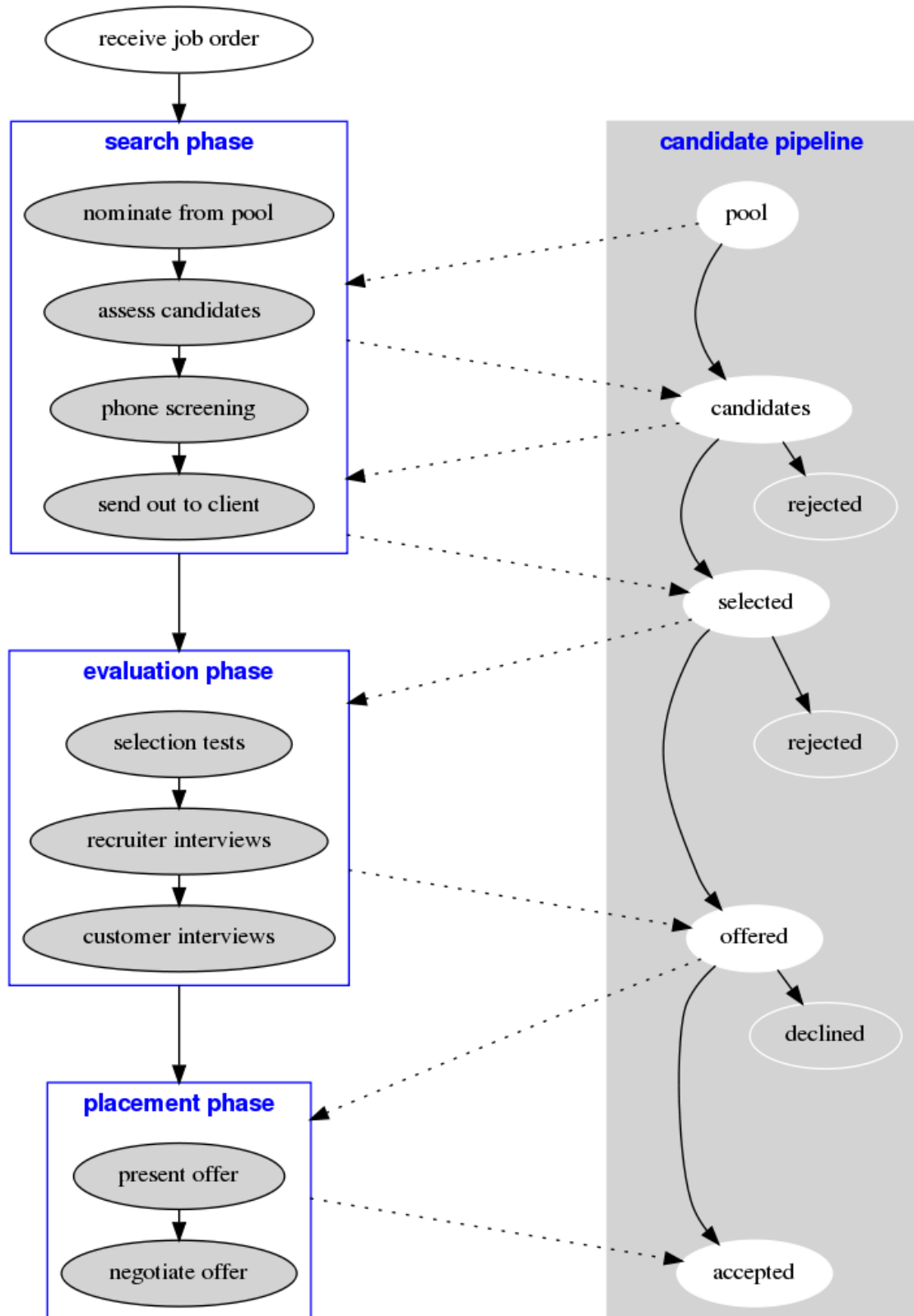


Figure 2.1. Recruiting process and pipeline



# Workflow

---

# 3

## **Installing and running OpenCATS**

---

**Requirements**

**Putting the software in place**

**A few things before you start**

**Starting up**

---

# 4

## Using OpenCATS

---

### Overview

#### 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.

## **Breaking down the workflow**

**The building blocks: companies, contacts, job orders, and candidates**

**The glue: actions, activities, and the pipeline**

**More nice things: resume parsing, bulk loading, email...**

**Multiple recruiters or territories**

## **Handling customers**

**Working with companies**

**Working with contacts**

**Managing job orders**

## **Handling talent**

**Sourcing candidates**

**Managing candidates**

**Resumes and attachments**

**Searching and sorting**

## **Reporting and exporting data**

**Reports**

## Detailed reports

## Exporting data

---

# 5

## **Configuring and administering OpenCATS**

---

**Managing users**

**Email and templates**

**Calendars**

**Backing up the OpenCATS database**

**Special tables**

---

# 6

## **Customizing OpenCATS**

---

**Branding**

**Localization**

**Using extensions**

**Creating extensions**

---

# 7

## **Further reading**

---

**Academic stuff**

**The user/developer community**