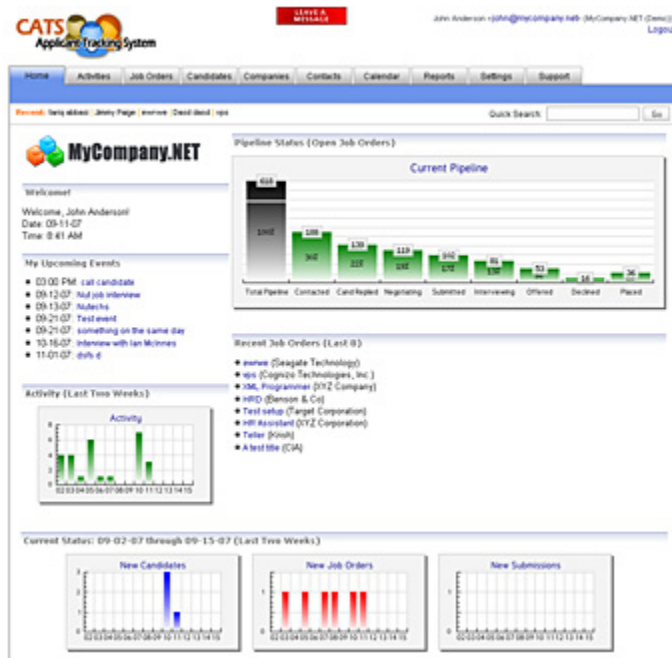


CATS

Applicant Tracking System

USER QUICK GUIDE



5 Minute Guide to CATS

About This Guide

This quick guide to CATS Applicant Tracking System is divided into 6 sections as follows:

Sections

- 1) Overview of CATS Modules
- 2) Typical Workflow of a Recruiter
- 3) Frequently Asked Questions

In Section 1, we will learn about the CATS Applicant Tracking System application through an overview of the CATS Modules [or tabs].

In Section 2 of this tutorial, we will walkthrough the typical workflow process of a recruiter.

In Sections 3, you will find answers to your questions regarding CATS Applicant Tracking System.

If you have further questions, use the contact information below to contact CATS Support.

Contact CATS Support Team

Cognizo Technologies, Inc

Attn: CATS Support Team

10501 Wayzata Blvd

Suite 100

Minnetonka, MN 55305

P: 952-417-0067 x101

F: 952-417-0068

E: support@catsone.com (a human will get back to you ASAP)

We are in the office from 9AM – 5PM Central Time (GMT -6). You can reach us at +1-952-417-0067.

SECTION 1: Overview of CATS Modules

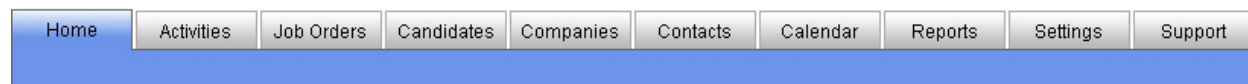


Fig 1-1. CATS Modules

- Almost all modules have a built-in filter to customize your viewing of available data. These filters can be found under the Quick Search box, as well as the resizable alpha-numerical column headers of data tables.
- The term **Hot** is referenced as a top priority item, shown in red.

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.

- **Cold Call List** is a group of various companies and contacts that you have not yet contacted.

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.

Support

CATS support contact information, links to CATS Forums, Bug Tracker, Mailing List and Knowledge Base are all available in this module.

SECTION 2: Typical Workflow of a Recruiter Walkthrough


In this section of this quick tutorial, we will cover a complete iteration of the hiring process in a typical workflow of CATS, which includes:

- 2.1) Creating a new company [optional]
- 2.2) Creating new contacts [or hiring managers]
- 2.3) Creating a new job order
- 2.4) Creating a new candidate
- 2.5) Adding candidate to above job order
- 2.6) Changing candidate's status based on interactivity with candidate

As a recruiter, you may notice that some or all of the above CATS workflow steps will apply to you on a daily basis.

- All of the tasks below require you to be logged in to perform.

2.1 Create New Company [optional]

1. Under the Companies module tab, click on the "Add Company" link
2. Fill the form with the company's information in one of two methods:
 - a. Manually enter in the company information into the text field boxes (on the left).
 - b. Use the freeform textbox on the right to automatically populate the text fields.
 - i. Copy a formatted company name and address from the company's website, and paste it in the big textbox to the right of the text fields.
 - ii. Click on the  button and CATS will automatically fill in the text fields with the respective information.
 - iii. Manually enter in all other relevant information that was not automatically filled.
3. Click the "Add Company" button and you will be brought to the newly created company's detail page.

- See the following screenshots for an example of automatically entering in the company's contact information using the freeform textbox.

Example 1: Using Cognizo Technologies contact information to automatically enter the Company Name, Primary Phone, Fax Number, Address, City, State, and Postal Code.

Company Name: *

Primary Phone:

Secondary Phone:

Fax Number:

Address:

City:

State:

Postal Code:

Web Site:

Departments: ▼

Hot Company: ☐

Cut and paste freeform address here.

Cognizo Technologies, Inc.
10501 Wayzata Blvd.
Suite 100
Minnetonka, MN 55305
P: (952) 417-0067
E: (952) 417-0068
[Report Incorrectly Parsed Address](#)

<--

Fig.2.1-1 Pasting company's freeform address. Then click on <-- button (circled in red above) to transfer the freeform address into the text fields on the left

Company Name: *

Primary Phone:

Secondary Phone:

Fax Number:

Address:

City:

State:

Postal Code:

Web Site:

Departments: ▼

Hot Company: ☐

Cut and paste freeform address here.

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<--

Fig. 2.1-2 Company information automatically renders in their appropriate fields

2.2 Create a Contact

1. While on the above created company detail page, scroll to the bottom of the page and click the "Add Contact" link.

● You may also create a contact by clicking the "Add Contact" link under the *Contacts module* tab.

2. Continue to fill out the contact person's information. Use the freeform textbox, if you wish.
3. Click on the "Add Contact" button and you will be brought to the newly created contact person's detail page.

2.3 Create New Job Order

1. Under the Job Orders module tab, click the “Add Job Order” link.
2. Select the type of job order you are creating.
 - a. If this is your first time adding a job order, select the first option “Empty Job Order”. This will create a new job order from scratch.
 - b. If you already have an existing job order and would like to copy it, then select the second option. Then select the job order you want to copy from the drop-down list.
3. Click on the “Create Job Order” button.
4. Fill out the Job Order form with the job details.


● **Internal Posting:** If you are hiring internally (for your own company), then create this Job Order as an Internal Posting.

5. If you have a specific contact person for this job order, indicate this person in the form field *Contact* by selecting the contact’s name from the drop-down box
6. Click on the “Add Job Order” button and you will be brought to the newly created Job Order.

2.4, 2.5 Create New Candidate / Add Candidate to a Job Order

Once a Job Order is created, you will need to find and add candidates for that Job Order.

1. Still on the above created Job Order detail page, scroll to the bottom and click the “Add Candidate to This Job Order Pipeline” link.
2. Search an existing candidate or create a new candidate.

● If a candidate exists and you would like to preview their profile, click on the “New Window” icon  in the **Action** column.

3. If creating a new candidate, either manually enter in all of the candidate’s contact information or use the freeform textbox to populate the text fields.


● If a resume for the candidate is available, upload it now. If not, you may upload a resume as an attachment to a candidate later.


4. Click on the “Add Candidate” button.
5. You will be redirected to the candidate’s detail page. Scroll down and you will notice that the Job Order you created above will be listed under the Candidate’s Job Order Pipeline.

● If you are in the Job Order view, the newly created candidate will also be listed under the Candidate Pipeline.

2.6 Changing a Candidate's Status Based on Interactivity with Candidate, Schedule an Event

You will want to log all activities with this particular candidate in regards to the above Job Order. Optionally, you can Schedule an Event and set a reminder email to be sent to you.

1. On the Candidate's detail page, under the Activity section, click on the "Log an Activity"  icon.
2. Select the appropriate Job Order from the "Regarding" drop-down menu.
3. Check the checkbox next to "Change Status" and select the candidate's new status.
4. To send a status change notification email to the Candidate,
 - a. Select the "Send E-Mail Notification to Candidate" option.
 - b. Customize the message, if you wish.
5. Select the Activity Type from the drop-down menu.
6. If applicable, Schedule an Event for this Candidate.
 - a. Check the "Schedule Event" checkbox.
 - b. Fill out the event details.
 - c. If you want an email reminder sent to your email address *before* the event happens, check the "Set Reminder" box.

- When scheduling an event, use the Calendar  icon to easily select your choice of date.
- A **Public Entry** lets other users in the CATS database see this activity status change.
- **Call (LVM)** means you've called the Candidate and left a voicemail.

7. Save the Log Activity. The status change will appear under the Candidate's Activity section. If applicable, the email reminder will be sent as scheduled.

SECTION 3: Frequently Asked Questions (FAQ) About CATS

Sign Up Questions

- ? Where can I find a demo version of CATS?**
Visit the CATS website and click on the "Login" navigation tab. Then click on the "Login to Demo Account" link left of the login box.
- ? Which web browsers work with CATS?**
Any of the following web browsers work with CATS: IE 6 or 7 (PC), Firefox 2 or later (Mac, PC, or Linux), Safari 2 or later (Mac).
- ? Isn't CATS free?**
Yes! CATS is a free open source software for anyone to use at NO COST. For the *Premium* account, you are paying for us to host CATS and provide customer support.
- ? Which forms of payment do you accept?**
We accept Visa, Mastercard, and American Express. We do not accept POs, checks, or invoices to be paid at a later date.
- ? Can I cancel later?**
Absolutely. CATS is a month-to-month service so you can cancel at any time -- there are no contracts!
- ? Why would I want you to host it?**
To run CATS, you need a website with certain software installed. If you just want to use CATS software and not worry about buying or building a web server, doing backups or installing updates, then having us host for you is the best option.
- ? Does the downloadable version of CATS allow for multiple users to access it at the same time?**
The downloaded version of CATS lets you use as many users as you want. The downside to the downloaded version is a complete lack of professional support, as well as infrequent updates which you have to manually apply.
- ? What kinds of features are available across all CATS accounts?**
Visit the **Sign Up** page on the CATS website at <http://www.catsone.com> to compare the supported features of each CATS account.
- ? We are using the free hosted CATS account. Can two different persons from the same company have separate login but still see the same information?**
As a free CATS user, you can have up to two users per site. To add an additional user, visit Settings -> Administration -> User Management and pick Add user. The new user will see all of the same data as your current user (with the exception of private calendar entries and chronological changes (View History) to candidate / company / job order / contact records).
- ? How do I upgrade my account?**
You can upgrade or downgrade your account at any time. You need to be an administrator to perform this action. To upgrade or downgrade, visit Settings -> Administration -> My Account (under Other Settings).

Installation Questions



What are the installation requirements for CATS?

CATS will run on any system (Windows, UNIX/Linux, or Mac OS X) where LAMP is available. LAMP refers to a set of free software programs commonly used to run dynamic websites.

- Linux - Operating System
- Apache - Web Server
- MySQL – Database
- PHP - Programming Language



What are the installation requirements for the older CATS release 0.8 jehlum?

For older versions, you will need the following:

- * MySQL Daemon 4.1 (or greater) [<http://www.mysql.org>]
- * PHP 5.x w/ MySQL Module [<http://www.php.net>]
- * PHP GD2 Module [<http://www.boutell.com/gd/>] ***
- * Apache HTTP Daemon [<http://www.apache.org>]

In addition, to process resumes, you will need:

- * Antiword [<http://www.winfield.demon.nl>]
- * PdfToText [<http://www.foolabs.com/xpdf/>]
- * html2text [<http://www.mbayer.de/html2text/>]
- * UnRTF [<http://www.gnu.org/software/unrtf/unrtf.html>]



Can CATS be installed on Windows 2003 and SQLServer?

CATS can be installed on Windows 2003, but is only compatible with MySQL (not Microsoft SQL server). Please read the installation instructions at <http://catsone.net/doc/INSTALL> for instructions on installing under Windows 2003.



If we decided for a local installation of CATS, would we be able to import our data from the Free Hosted service?

As a free user, you can use the site backup utility to create a backup of your entire site and download it to your local machine. You can create backups by visiting Settings -> Administration -> Site Backups.

Restoring a backup from catsone.com into your local installation of CATS is conceptually very easy and reliable. We have helped various users do this in the past without any major issues. However, because the features and database structure of CATS are under constant change, it may be possible that a few errors occur in restoring CATS into your local environment as a result of downgrading from our hosted version into the most recently available open source version. In that event, we will provide assistance in restoring your backup.



What if I want to install both CATS and other ATS/CRM application? Will CATS integrate with them?

CATS has nothing to do with other ATS/CRM applications. They install and run independent of each other. You should put your other applications under webserver/otherapplication and CATS under webserver/cats.

Application / License Questions



How do I link a resume to the database which then allows me to search? Does this system parse information and create keywords?

When you create a candidate profile in CATS, you can optionally upload a resume to attach to the profile at the same time. The resume is then keyword searchable through the candidate search option. Click the candidate tab and click search.

? Where can I find documentation on how to use CATS?
CATS was designed to be as intuitive as possible. We find most users can figure out how a feature works with a little experimentation. If a feature doesn't make sense to you, please report it to us and we will change our design to be easier for new users to use.

? How do I perform a mass import of resumes? Does it create a new candidate file for each one?
In order to do a mass import of resumes, you will need to deliver the resumes to us either via DVD's in the mail (for extremely large quantities), or by emailing your files to us. We will perform the bulk resume import for you.

At this point, the bulk upload feature makes the resumes searchable by keywords. You will have to manually select the resume and create a candidate. The ability to create candidates from resumes will be added to the next release of CATS.

? How can I test Resume Bulk Import? Currently, the option is disabled for me.
Bulk Resume Import on catsone.com is currently completely administered by our support team. If you wish to test out the bulk resume import functionality, please e-mail us a zipped file of the resumes and we can import them for you, with instructions on how to access them. When you wish to upload a large amount of resumes, we will provide you with an FTP server to upload all of the resumes to.

? Is there anyway that you can alphabetize the saved list? As we add job categories, it is hard to save candidates to a category since it is all scrambled.
Saved Lists are undergoing a major redesign which will significantly improve usability, as well as make them sortable alphabetically. You will see these changes automatically within a few weeks.

? CATS does not have a Time Zone for my area. What should I do?
As long as your server is in the right time zone, you can set the time zone in CATS to any time zone during installation and all the times within CATS will be correct.

? Can I download & integrate it in www.classifiedsqa.com site for free, retaining your company information?
You can not provide CATS as a hosted service. Please read the license agreement.
http://catsone.com/?a=license_cpl

? What if I want to integrate CATS into my client's website and system? What does the CATS Public License (CPL) say about this?
The CPL restricts you from selling CATS as a service in a manner that is competitive to our hosted solution on catsone.com. You may implement CATS for your clients on a case by case basis as long as you are not advertising the fact that you can fulfill ATS functionality.

For example, if you started a consulting business providing a suite of applications for a client including CATS, this would be against the terms of the CPL. However, if you were a web host and your client specifically asks you to install CATS, you are allowed to install, configure, and maintain the CATS installation on behalf of the client's request.

1) Yes, you may deliver CATS for your clients and 2) no, you are not allowed to promote it as part of a larger solution in a standard offering. In short, you may not make a business out of selling CATS.