



# RFI Response

WHCG ATS RFX Initiative



AUGUST 22, 2023



Tuesday August 22nd, 2023

Alicia, Brittanie & Wilson HCG Team,

We appreciate the chance to participate in your RFP process. Our commitment to collaboration and integrity aligns with your core values. We are also passionate about technology and are excited to contribute our solutions and expertise to fulfill your needs. Thank you for considering BrightMove.

Best,

**Jimmy Hurff**

Co-Founder & Head of Customer Success

C: 904.382.3308



# RFI RESPONSE TABLE OF CONTENTS

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## INTRODUCING BRIGHTMOVE

We build software our customers love to use.

BrightMove, a pioneer in applicant tracking software (ATS) since 2005, has emerged as a global innovator in the realm of hiring technology and recruiting software. Based in St. Augustine Beach, Florida, BrightMove offers a cloud-based platform that caters to Recruitment Process Outsourcing (RPO), Professional Employer Organizations (PEO), Staffing, and Human Resource teams worldwide.

At the heart of BrightMove's success are its core values, encompassing customer-centricity, integrity, open communication, innovation, and a deep-seated passion for user-friendly software. Founded by David Webb and Jimmy Hurff, BrightMove was born from the duo's frustration with inadequate hiring software solutions. This ignited a mission to create tools that optimize business management, enhance candidate searches, and revolutionize the recruiting industry. The resulting platform, an applicant tracking system designed by recruiters for recruiters, underscores BrightMove's commitment to innovation and customer-driven solutions.

Headed by CEO David Webb, BrightMove remains rooted in its Florida headquarters, steadfast in its values, and focused on customer satisfaction. Its journey, marked by accolades and industry recognition, underscores the company's dedication to pushing boundaries, embracing innovation, and transforming hiring technology on a global scale.



APPLICANT  
TRACKING  
SOFTWARE

## RFI RESPONSE **OUR APPROACH**

After a thorough assessment of this RFI, it's apparent that the authors have skillfully tailored the subject areas and questions to align with WilsonHCG's specific needs and values. Our goal is to provide comprehensive answers to each question, enriched with substantial examples. This approach, though detailed, emphasizes our dedication to thoroughness over brevity.

The structure of the response entails a summarized overview followed by in-depth answers to individual questions. These questions are categorized based on the subject areas outlined by WilsonHCG, ensuring clear organization and relevance.

Each question is addressed on a dedicated page, featuring pertinent examples designed to enhance the clarity of our communication about our solutions.

Throughout the response, we also reference a sandbox environment that was deployed for illustrative purposes. You can access the sandbox via <http://wilsonhcg.brightmove.com>



## Summarized Overview

For the full response, please find details in subsequent pages.

# RFI RESPONSE SUMMARY

## SYSTEM FEATURES AND FUNCTIONALITY

1. What are the core features of the platform? ..... Applicant tracking & CRM for RPO Companies.
2. Can it manage multiple job openings and track their progress individually? ..... Yes.
3. Can it automatically screen and rank candidates based on predefined criteria? ..... Yes.
4. Are there any fields, features that are not adjustable in your system? ..... Yes, but these are few and far between. (These examples are adjustable)  
(Ex: Source list, category, etc.)

## CANDIDATE EXPERIENCE AND ENGAGEMENT

5. How does the platform enhance the candidate experience? ..... Branding, User Experience and Automation
6. Are there tools for creating and managing email campaigns to nurture candidate relationships? ..... Yes, through our two-way integration with SenseHQ.
7. Is there a mobile-friendly application process available? ..... Yes.

## DATA MANAGEMENT AND COMPLIANCE

8. How is candidate data collected, stored and secured? ..... With great care.
9. Does the system comply with relevant data protection and privacy regulations? ..... Yes.
10. How quickly do your data refreshes happen? (Are your system reports real-time, or do they have a lag?) .. Searchable attributes refreshed in real-time. Analytical report have 1 hour latency. (Both)

## REPORTING AND ANALYTICS

11. Are custom fields fully reportable within the system? ..... Yes.
12. Does the platform support in-system custom report building? ..... Yes.
13. Can reports be built using expressions or formulas to calculate the desired outcome? ..... Yes.
14. Are customizable dashboards available? ..... Yes.

## INTEGRATION AND CUSTOMIZATION

15. Is the system customizable to match the organization's branding and workflow?? ..... Yes.
16. Does your system have an open API (and does it work with custom fields)? ..... Yes. (and Yes)
17. How many steps can each workflow have? ..... As many as you require.

## RFI RESPONSE SUMMARY

### INTEGRATION AND CUSTOMIZATION

18. Can system access and data be segmented in such a way that recruiters only have access to specific data sets and not others? ..... Yes.
19. Does the system have a limit on sub-instances/tenants? ..... No.
20. Are custom fields supported for candidate, job or workflow records (and if so, is there a limit on how many can be created at one time)? ..... Yes. (There is no limit on custom fields.)
21. How customizable are the hiring workflows and can they support forced/fixed stage progression (to prevent missed/skipped steps)? ..... The submittal workflow is completely customizable.

### IMPLEMENTATION AND TRAINING

22. Can the system be configured without the assistance of technical support? ..... Yes.
23. Does a sandbox instance exist as part of your solution? ..... Yes.

### CLIENT REFERENCES

24. Are there any case studies or success stories available? ..... See attached.
25. Please be advised that references will be required as a part of the request for proposal phase. .... See attached.



# System Features & Functionality

An overview of the core ATS platform.



# SUBJECT AREA SYSTEM FEATURES & FUNCTIONALITY

## 1. What are the core features of the platform?

### Applicant Tracking & CRM for RPO Companies.

BrightMove ATS, tailored for Recruitment Process Outsourcing (RPO) companies, offers specialized features to streamline high volume recruitment organizations. It enables RPO recruiters to manage multiple customer accounts from a single login we call **One Login**. This is done through a **proprietary** parent/child model. This design reduces costs by requiring only one license per recruiter, regardless of the number of customer accounts. Real-time metrics and analytics empower data-driven decisions, while customizable workflows and templates cater to individual client needs. The integration of AI and business intelligence automates processes, enhancing recruiter productivity. Deep insights and analytics provide valuable performance data, and the Wisdom analytics platform aids in making informed decisions. With advanced sourcing capabilities and client management tools, BrightMove ATS ensures efficient transitions between customer accounts. This modern, analytical, and customizable ATS helps RPO companies meet SLAs, enhance customer satisfaction, and boost recruiter productivity.

We will explore these core features in more detail throughout this response.

- |  |                                |
|--|--------------------------------|
| 🔊 100% Cloud-based Software as a Service       | 🔊 Customizable Hiring Workflow |
| 🔊 <b>One Login</b> multi-tenant config for RPO | 🔊 PowerSearch                  |
| 🔊 Communication Tracking & CRM                 | 🔊 Modern Data Analytics Tools  |
| 🔊 Sourcing Tools                               | 🔊 Back Office Tools            |
| 🔊 Job Board Posting                            | 🔊 Robust, Open API             |

Each of your customers can have a customized portal & workflow.  
**They don't have to adjust their process to fit the ATS!**

### brightmove MODERN RECRUITING SOFTWARE Features



## SUBJECT AREA SYSTEM FEATURES & FUNCTIONALITY

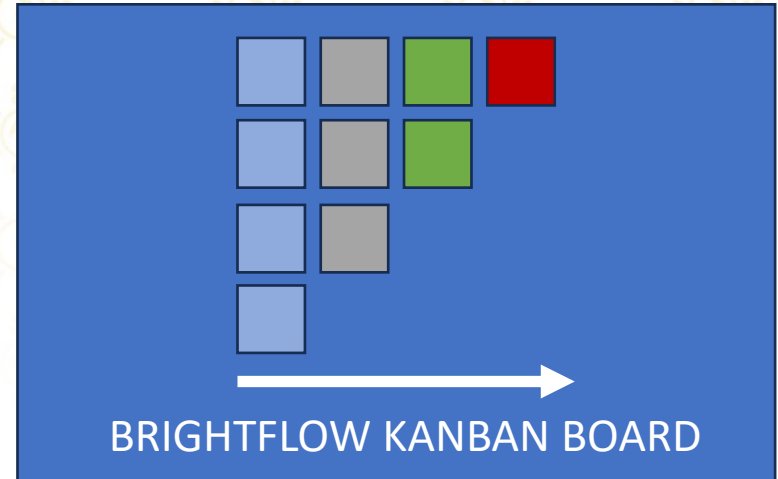
### 2. Can it manage multiple job openings and track their progress individually?

**Yes.**

It can manage multiple jobs for multiple companies. BrightMove's ATS uses a parent/child model to manage **multiple companies' multiple jobs** seamlessly. BrightMove for RPO allows configuration of a parent company and child companies, enabling efficient job management from a single login. The system tracks all candidate progress, capturing data and application status across jobs, while robust analytics provide insights like time-to-hire and candidate-to-hire ratios. This empowers informed decisions and streamlined collaboration, enhancing overall recruitment efficiency.

You can view job openings and the progress of the submitted candidates via the BrightFlow view.

**BrightFlow, also called the Kanban View, is inspired by the Japanese manufacturing philosophy created at Toyota in the late 1940s.**



- 💡 Single pane of glass view of all jobs
- 💡 Based on customized submittal workflow
- 💡 Quick company creation via templates
- 💡 Quick job creation via templates

## SUBJECT AREA SYSTEM FEATURES & FUNCTIONALITY

### 3. Can it automatically screen and rank candidates based on predefined criteria?

**Yes.**

BrightMove offers the capability to automatically screen and rank candidates based on predefined criteria. Through its advanced features, the system can evaluate candidates against specific qualifications, skills, and attributes set by the user. This automation streamlines the initial screening process and ranks candidates according to their suitability for the job. This functionality helps save time and ensures that the most relevant candidates are highlighted for further consideration in the hiring process.

Manage Question

Question

Are you eligible to work anywhere in the United States?

Question Type

Multiple Choice

☒ Show On Portal

☒ Require Correct Answer

! Answers

Sort

Add Answer

Display Order	Answer	Correct	Actions
1	Yes	Yes	<div>Edit</div> <div>Delete</div>
2	No	No	<div>Edit</div> <div>Delete</div>

Display Order

Answer

Correct

Actions

Save Question



Also called **knock out questions**



Allows for multiple correct choices



Can be set globally or for specific jobs



Workflow routing based on response

## SUBJECT AREA SYSTEM FEATURES & FUNCTIONALITY

### 4. Are there any fields, features that are not adjustable in your system? (Ex: Source list, category, etc.)

**Yes, but these are few and far between.**

We call these fields **admin preferences**. It's not that they are not adjustable, just that they must be done so with care. For example, GUIDs that connect your ATS to your General Ledger system are generally static and not editable from within the user interface. There are a few others, but not many.

On the other hand, the examples you listed are all adjustable. In our modern ATS, customization is a key design principle. With BrightMove ATS, you can configure nearly every attribute and screen within the platform.

You can also modify and change labels using **company preferences**.

Company preferences can be set at the parent or child company level.

See the list for other adjustable fields.

### Some Adjustable Fields in BrightMove:

**Job Fields:** You can customize fields related to job postings, such as job titles, job description, requirements, and other relevant information.

**Job Categories:** You can customize the categories and industries that are assigned to your jobs.

**Candidate Information:** You can customize fields for candidate details, like resumes, contact information, skills, education, and work history.

**Source Lists:** You can customize the list of sources from which candidates are referred or acquired.

**Categories and Tags:** You can customizable tags and categories to organize candidates, clients, hiring managers and jobs, making searches and sorting more efficient.

**Workflows:** You can customize the candidate submittal workflow, by adding statuses, screening questions, interview stages, and other steps in the recruitment process.

**Email Templates:** You can customize email templates for various stages of communication with candidates and clients.

**User Roles and Permissions:** You can customize the user roles and permissions based on your organization's structure and needs.



# Candidate Experience & Engagement

Smart, integrated solutions with your branding.



## SUBJECT AREA CANDIDATE EXPERIENCE & ENGAGEMENT

### 5. How does the platform enhance the candidate experience?

#### Through Branding, User Friendliness & Automation.

**Consistent Branding:** Consistent branding in the candidate journey enhances professionalism and candidate perception. For RPOs, representing both your brand and customers' brands is challenging, but BrightMove's customizable platform can make this easier.

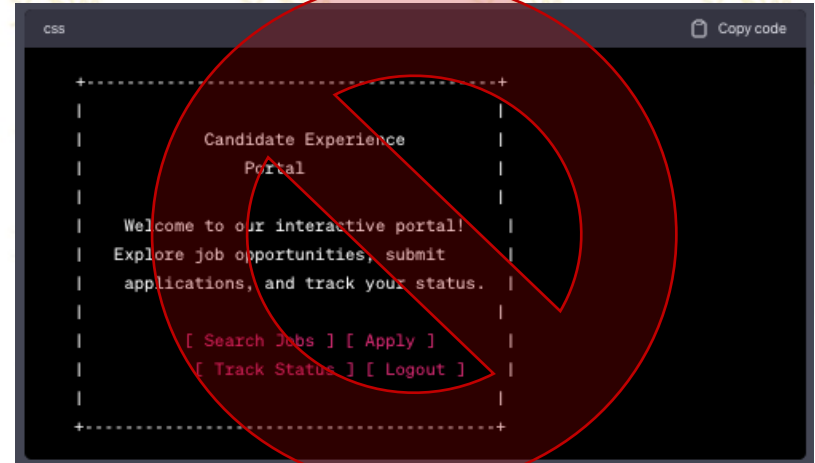
**User-Friendly Interface:** BrightMove's user-centric design ensures an intuitive and easy-to-navigate interface for candidates. This makes it simple for them to search and apply for jobs, creating a positive first impression.

**Mobile Responsiveness:** The platform's mobile-responsive design enables candidates to access and apply for jobs from any device, accommodating the preferences of today's mobile-driven users.

**Streamlined Application Process:** BrightMove optimizes the application process, minimizing the steps required for candidates to submit their information and apply for positions.

**Automated Updates:** Automated status updates and notifications keep candidates informed about their application progress, reducing uncertainty and enhancing engagement.

**Candidate Experience Portal:** Providing candidates with a portal to track their application status, submit documents, and communicate with recruiters enhances transparency and engagement.



- 💡 Works with **Indeed Quick Apply**
- 💡 Modern portal technology
- 💡 Branded portals for each RPO child
- 💡 Integrates natively
- 💡 Follows brand and style guide

## SUBJECT AREA CANDIDATE EXPERIENCE & ENGAGEMENT

### 6. Are there tools for creating and managing email campaigns to nurture candidate relationships?

**Yes. Through our two-way integration with SenseHQ.**

BrightMove and Sense integrate for automated, personalized communication. Multi-channel engagement accommodates preferences. AI-driven personalization enhances the candidate experience.

- 💡 Streamlined scheduling reduces missed interviews
- 💡 Ongoing nurturing maintains interest
- 💡 Unified data offers insights
- 💡 Seamless experience enhances brand

**Optimize strategies with BrightMove & Sense.**

### FEATURED INTEGRATION



Through our robust, two-way integration with SenseHQ, we deliver these integrated candidate engagement capabilities from within the ATS.

- 💡 Onmi-channel communications
- 💡 Automated campaigns
- 💡 SMS / Text Messaging
- 💡 Personalized engagement
- 💡 Surveys & Journeys
- 💡 ChatBots

Through this integration, all correspondence with the candidates is recorded against their activity history.

## SUBJECT AREA CANDIDATE EXPERIENCE & ENGAGEMENT

### 7. Is there a mobile-friendly application process available?

**Yes.**

BrightMove offers a mobile-friendly application process for candidates. The platform's design is responsive, meaning that candidates can easily access and navigate the application process using their mobile devices, such as smartphones and tablets. This feature acknowledges the importance of mobile usage in today's digital landscape and ensures that candidates can conveniently browse job listings, submit applications, and engage with the platform from anywhere, at any time, using their preferred mobile devices.

Also, the mobile-friendly candidate experience portals support **Indeed Quick Apply** which further enables a streamlined application process.

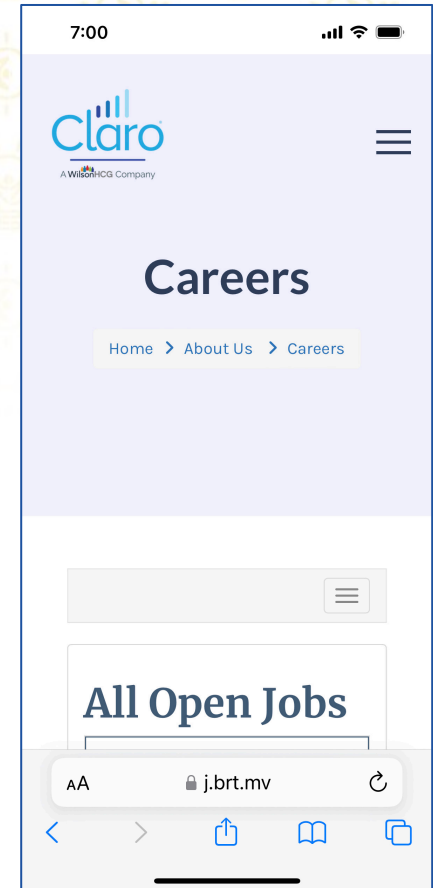
**Want to see it for yourself? Try the links below.**

#### Branded Demo Portals

[WilsonHCG](#)  
[Claro](#)

#### Unbranded Demo Portals

[ABC Beverage, LLC](#)  
[WHCG Exec Search](#)





# Data Management & Compliance

Secure, cloud-based data storage and management.

## SUBJECT AREA DATA MANAGEMENT & COMPLIANCE

### 8. How is candidate data collected, stored and secured?

**With great care.**

Candidate data is collected, stored, and secured in BrightMove through a robust and comprehensive process:

**Collection:** Candidate data is collected as candidates and recruiters engage with the platform, including application submissions and relevant information.

**Storage:** Data is stored within BrightMove's secure cloud-deployed database infrastructure, ensuring accessibility and organization.

**Data Security:** Industry-standard measures like encryption, firewalls, and access controls safeguard data from unauthorized access or breaches.

**Compliance:** BrightMove conforms to data protection regulations like GDPR, integrating consent mechanisms and appropriate data handling practices.

**Role-Based Access:** Access to candidate data is controlled by role-based permissions, ensuring confidentiality and limiting data exposure.

**Anonymization and Pseudonymization:** Techniques like anonymization and pseudonymization are employed for added protection of sensitive data.

**Regular Audits:** The platform undergoes security audits to identify vulnerabilities and ensure data protection is consistently maintained.

**Data Retention:** Data retention policies align with legal requirements and best practices, determining how long candidate data is stored.

**Data Sharing:** Sharing adheres to permissions and consent, ensuring information is only accessible to relevant authorized parties.

**User Education:** Platform users are educated on data security best practices, promoting responsible data handling.

By following these practices, BrightMove guarantees secure and compliant handling of candidate data, reinforcing its commitment to privacy and protection.



## SUBJECT AREA DATA MANAGEMENT & COMPLIANCE

### 9. Does the system comply with relevant data protection and privacy regulations?

**Yes.**

BrightMove's system is designed to comply with relevant data protection and privacy regulations, including the widely recognized standard General Data Protection Regulation (GDPR). The platform incorporates features and practices that align with these regulations to ensure the secure and lawful handling of candidate and user data. This includes mechanisms for obtaining consent, implementing security measures, allowing data access controls, enabling data portability, and facilitating data erasure requests. BrightMove's commitment to compliance helps organizations using the platform maintain the highest standards of data protection and privacy in their recruitment processes.

With BrightMove's GDPR compliance engine, personal data is protected, classified and managed automatically.

**With BrightMove, you can also give candidates the ability to self-serve.** You can enable this feature in the Candidate Experience Portal security. This is not required, but one capability you'd have as a data controller!

Candidate Experience Security		
<div>Expand All Collapse All Save Go Back</div>		
Search: <input type="text"/>		
Permission Name	Grant	Description
Access Application	×	General Access - Required for all other access
Access Candidate Module	×	Required for all other Candidate permissions
View Exam Module	×	View Exam Module
Access Time Module	×	Required for all other timesheet permissions
Access Tools Module	×	Required for all other access within the Tools Module
Upload Candidate Attachment	×	Permission for portal Candidate to upload Attachments to their profile

Ad hoc & batch reporting available	Audit record for changes
Night batch archiving	All data is encrypted in-flight & at rest

## SUBJECT AREA DATA MANAGEMENT & COMPLIANCE

**10. How quickly do your data refreshes happen?  
(Are your system reports real-time, or do they have a lag?)**

**Searchable attributes are refreshed in real-time.  
Analytical reports have 1 hour of latency.**

BrightMove's data refresh rates vary based on the specific functionalities and reports within the system. Some aspects of the platform provide real-time data updates (like PowerSearch, Submittal Workflow changes, Candidate Applications, etc.).

Analytics platforms, like our Wisdom data warehouse, have approximately 1 hour of lag due to data processing and synchronization processes. Some time, latency is imposed due to business rules (i.e. a snapshot for the day needs to be run in batch at the end of the day). Sub-systems with latency include the job distribution engine and ad hoc reporting & analytics platforms. It's recommended to refer to BrightMove's [official documentation](#) for precise information about the data refresh rates for different features and reports within the system.

**BrightMove is incredibly fast.**



**FAST**

Our PowerSearch and Per Transaction times are faster than a blink of an eye - a blink of an eye takes 300-400ms

**POWERSEARCH: 136ms BRIGHTMOVE ATS: 37ms**



# Reporting & Analytics

Introducing Wisdom: Our modern data analytics platform

## SUBJECT AREA REPORTING & ANALYTICS

### 11. Are custom fields fully reportable within the system?

Yes.

Custom fields in BrightMove, also called User Defined Fields, are fully reportable in our ad hoc and Wisdom platforms. These custom fields seamlessly integrate into your reports and analytics, enriching your data insights. By incorporating custom fields into your reports, you gain a view of your recruitment processes in the vernacular of your organization, leveraging the depth of data captured through these fields. This feature enhances reporting flexibility, enabling you to tailor your analyses to your organization's unique requirements and jargon. With Wisdom's integrated capabilities, custom fields contribute to a comprehensive understanding of your recruitment operations, empowering informed decision-making based on the data most relevant to your business objectives.

UDF fields are fully reportable in ad hoc and Wisdom-based reporting.

### Ad-Hoc Reporting

Save Report Copy Report Export Preview Report Delete Report Back to List

Format Data ☒

GENERAL FIELDS GROUPING FILTERS SORTING FUNCTIONS SCHEDULE

Available Fields Filter Clear

Sales Employee +

State +

Status +

Type +

Selected Fields Filter Clear

First Name -

Last Name -

WHCG Onboarding | Onboarding Cost Center -

WHCG Onboarding | Onboarding Team -

Data last refreshed hourly

#### WHCG Onboarding Report

First Name	Last Name	WHCG Onboarding   Onboarding Cost Center	WHCG Onboarding   Onboarding Team	Client Name	First Name	Last Name	Office Name	Hire Date	Start Date	Title
John	Doe	987	US Team	Widget Operations	Walter	Widgeton	Main	8/19/23	8/21/23	Widget Analyst

Showing 1 of 1 Results.

## SUBJECT AREA REPORTING & ANALYTICS

### 12. Does the platform support in-system custom report building?

**Yes.**

Yes, the platform offers robust support for in-system custom report building through various tools, including the standard report suite, the ad hoc reporting tool, and Wisdom. The standard report suite provides predefined report templates, while the ad hoc reporting tool empowers users to create custom reports by selecting specific data points, filters, and output options.

Additionally, Wisdom, the modern data analytics platform, further enhances the custom visualization-building capabilities. It enables advanced data manipulation, exploration, and visualization, allowing users to extract actionable insights from their data. The combination of these tools ensures that users can efficiently create tailored reports to meet their specific analytical needs within the platform.

**Ad-Hoc Reports** [New Report](#)

Subject Area

Choose a Subject Area to Filter Results

My Reports Public Reports **All Reports**

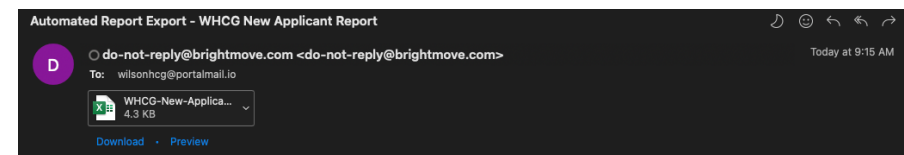
Show 10 entries Search:

Title	Subject Area	Created By	Create Date	Modify Date	Public	Actions
<a href="#">WHCG Onboarding Report</a>	Placement	WilsonHCG Admin	08/19/2023 07:43 AM	08/19/2023 09:09 AM	No	<a href="#">View</a> <a href="#">Delete</a>
<a href="#">WHCG New Applicant Report</a>	Applicant	WilsonHCG Admin	08/19/2023 09:14 AM	08/19/2023 09:14 AM	Yes	<a href="#">View</a> <a href="#">Delete</a>
Title	Subject Area	Created By	Create Date	Modify Date	Public	Actions

Showing 1 to 2 of 2 entries [Previous](#) [1](#) [Next](#)

### Run reports on demand or schedule them!

BrightMove Ad Hoc Reporting can deliver reports in a variety of formats including MS Excel, Comma Separated Variable, MS Word or PDF





## SUBJECT AREA REPORTING & ANALYTICS

### 13. Can reports be built using expressions or formulas to calculate the desired outcome?

**Yes.**

With Wisdom, you can build reports using expressions or formulas to calculate the desired outcomes. Wisdom's advanced analytics platform offers the capability to perform complex calculations and create custom expressions to derive insights from your data. This feature empowers users to manipulate and transform data, apply mathematical operations, and create custom formulas to generate tailored reports that align with your specific analytical needs. Wisdom's data manipulation and calculation functionalities enhance the depth and accuracy of your reports, ensuring that you can extract meaningful insights from your recruitment data.

## Advanced analytics integrated directly within the RPO ATS!

[illegible]

**With Wisdom, *analyze* using Excel-like interface to your data.**  
**Publish custom dashboards to share with your business partners & customers!**

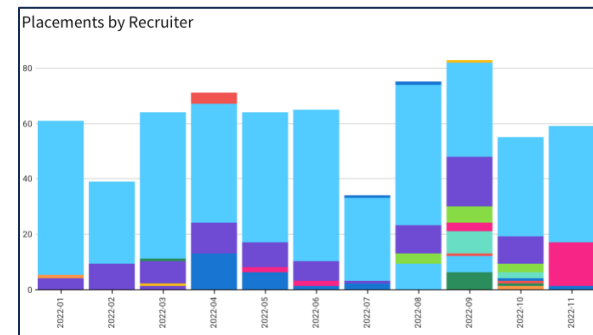
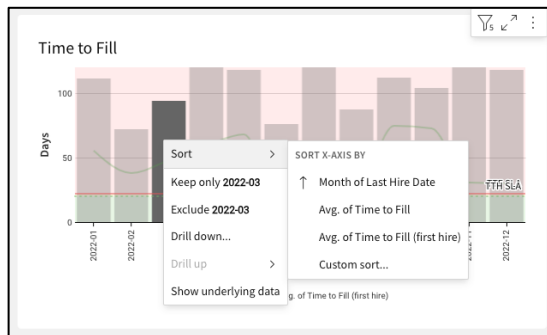
## SUBJECT AREA REPORTING & ANALYTICS

### 14. Are customizable dashboards available?

**Yes.**

Yes, customizable dashboards are available within the Wisdom platform. Wisdom's advanced analytics capabilities extend to providing customizable dashboards that allow users to design and configure their own visual displays of data. This empowers users to curate dashboards that highlight the metrics, key performance indicators (KPIs), and data visualizations that are most relevant to their specific roles and objectives. By offering customizable dashboards, Wisdom enhances the user experience by providing a personalized and dynamic view of data, enabling users to monitor and analyze recruitment metrics in a way that suits their preferences and needs.

In addition to customizable dashboards within the Wisdom platform, BrightMove also offers pre-configured or "canned" dashboards that can be used without Wisdom. These pre-built dashboards provide users with ready-made visualizations and insights to quickly access key recruitment metrics and analytics. While Wisdom enhances customization and advanced analytics, these canned dashboards provide a convenient option for users who may not require the full capabilities of the Wisdom platform. Whether you opt for pre-configured dashboards or leverage Wisdom's customizable features, BrightMove offers a range of dashboard options to cater to different user preferences and analytical needs.





# Integration & Customization

Endless branding configurations, multiple out-of-the-box integrations and a robust, open API

## SUBJECT AREA INTEGRATION & CUSTOMIZATION

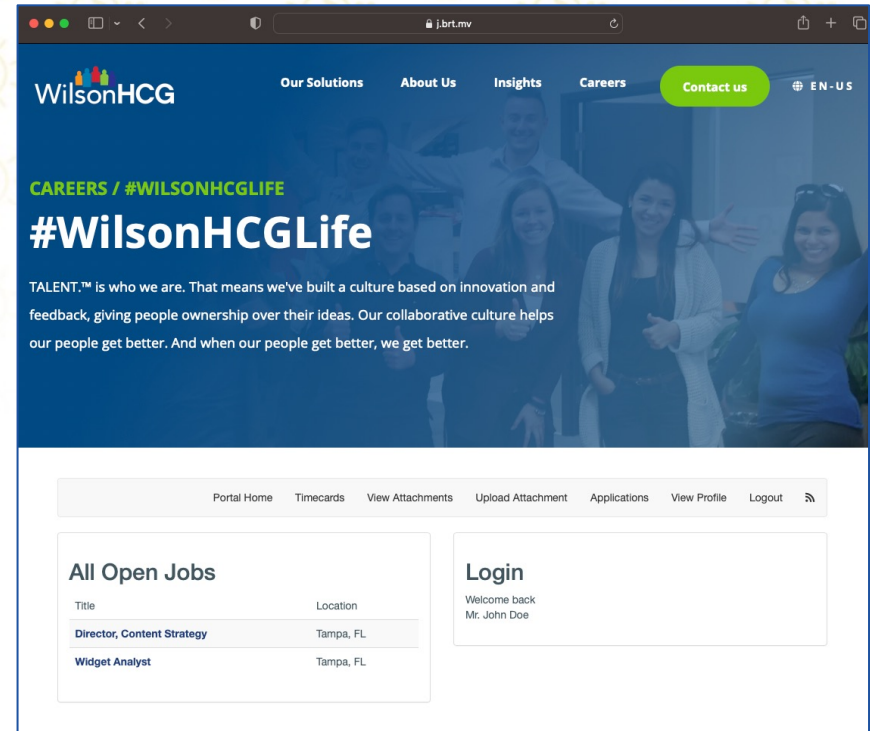
### 15. Is the system customizable to match the organization's branding and workflow?

Yes.

The BrightMove system is customizable to align with your organization's branding and workflow. The platform provides the flexibility to incorporate your company's branding elements such as logos, colors, and styles, ensuring a consistent and branded experience for both candidates and users.

Additionally, BrightMove allows you to configure workflows, stages, and processes to mirror your organization's **and your customers'** specific recruitment processes. This customization empowers you to tailor the platform to match your unique branding identity and workflow requirements, providing a seamless and cohesive experience for both users and candidates interacting with the system.

Through **One Login**, our submittal workflow module and using our proprietary parent/child model, you can sell to your customers without requiring them to change their hiring process workflow!



Powered by BrightMove

Demo ATS: <https://wilsonhcg.brightmove.com>

Demo Portal: <https://j.brt.mv/ax.do?refresh=true&portalGK=40575>

## SUBJECT AREA INTEGRATION & CUSTOMIZATION

### 16. Does your system have an open API (and does it work with custom fields)?

#### Yes. (and yes)

BrightMove offers a comprehensive Open API that provides direct access to your ATS environment's data. Our developer-centric documentation guides you through leveraging the API effectively. You can interact with your ATS data seamlessly, including custom fields, to enhance your recruitment processes.

To explore our API capabilities and ensure connectivity to your planned custom fields, visit our developer documentation at:

<https://brightmove.com/developers>.

It outlines the functionalities and guides you on making the most of our Open API for a tailored and efficient experience.

(If you are specifically interested in UDF API operations, [see this example](#)).

### Get UDF Sections

**GET** <https://secure.brightmove.com/ATS/app/lookup/sections/{entityTypeId}/{entityGk}>

Get the List of UDF Sections for an Entity

#### YOUR REQUEST HISTORY

0 Calls

7 Days 

Your API calls will appear here. Make a request to get started!

#### PATH PARAMS

entityTypeId int32 required

entityGk int64 required

**With BrightMove's Open API, you can access your ATS data!**  
**User defined fields can be accessed and manipulated with the appropriate web service endpoint.**



## SUBJECT AREA INTEGRATION & CUSTOMIZATION

### 17. How many steps can each workflow have?

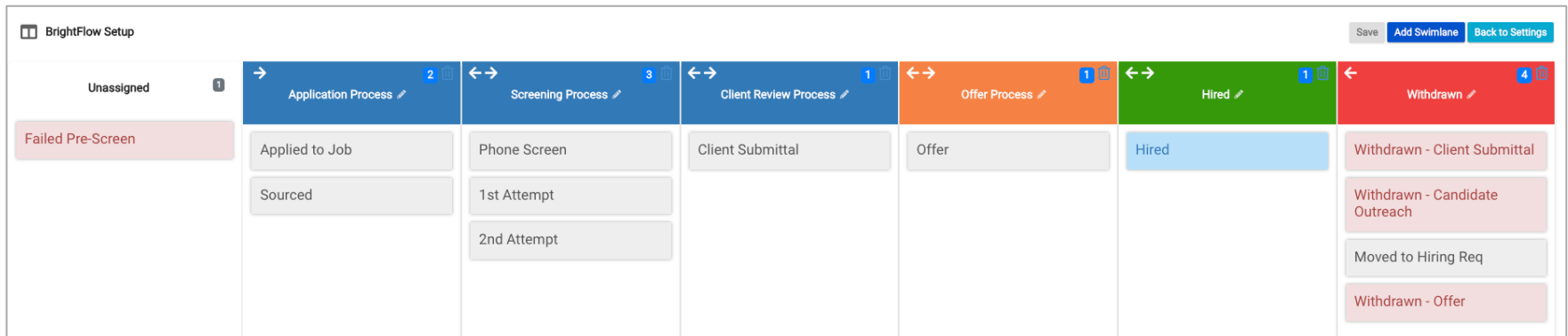
**As many as you require.**

BrightMove's workflows are designed to be highly flexible, accommodating your organization's unique recruitment processes. While there are no technical or licensing constraints on the number of steps, **practical considerations for usability come into play**. We encourage creating workflows that remain manageable and user-friendly. This ensures that your recruitment team can effectively navigate and execute each step.

It's important to note the distinction between workflow stages and statuses. Stages represent key steps in the recruitment process, while statuses are assignments within those stages. BrightMove's platform offers the capability to configure rules tied to inputs and outputs for both stages and statuses. This means you can fine-tune each stage and status based on your specific workflow requirements, enhancing the efficiency and precision of your recruitment process.

**BrightMove's submittal workflow can be configured per child company.**

**This enables you to adapt the ATS to fit your customer's process, resulting in a smooth sales experience without *process interruption*.**



## SUBJECT AREA INTEGRATION & CUSTOMIZATION

**18. Can system access and data be segmented in such a way that recruiters only have access to specific data sets and not others?**

**Yes.**

BrightMove utilizes Role-Based Access Control (RBAC) in conjunction with the parent-child company model to enable sophisticated data segmentation. With RBAC, you can assign different roles to recruiters based on their responsibilities. This ensures that recruiters have access only to the data and features relevant to their roles.

Additionally, BrightMove's parent-child company model allows you to create child company accounts, each with its own set of data and configurations. This model offers a hierarchical structure where your parent company can oversee multiple child companies. Recruiters with permissions within the child company have access only to the data and functions associated with their specific child, maintaining data integrity and confidentiality.

By combining RBAC and the parent-child company model, BrightMove empowers you to tailor system access to recruiters' roles and responsibilities, ensuring that they can efficiently work with the data they need while respecting data segregation and privacy requirements.

The screenshot shows a web interface titled "Manage Company Access". At the top right, there are two tabs: "Available" (highlighted in blue) and "Assigned". Below the tabs is a table with two columns: "Company" and "Security Role". The "Company" column lists three entries: "ABC Beverage, LLC", "Claro", and "WHCG Executive Search", each with a blue "+" icon to its right. To the right of the table is a dropdown menu for "Security Role" with the following options: "Administrator" (selected with a checkmark), "Custom WHCG Role", "Recruiter", and "Sales". At the bottom right of the interface is a "Save" button.

**One Login Saves Time and Money!**

**Manage security and access across all of your customers from a single platform.**

## SUBJECT AREA INTEGRATION & CUSTOMIZATION

### 19. Does the system have a limit on sub-instances/tenants?

**No.**

**One Login:** This is what BrightMove for RPO is all about.

"Child companies" and "managed companies" both refer to what you called sub-instances or tenants. This sets BrightMove apart as a key market differentiator. Child companies (or managed companies) represent your RPO customers when using BrightMove for RPO. This offers a scalable structure with no technical limits to child companies. BrightMove for RPO is licensed in tiers, including tranches of child companies, tailored to your needs. To explore this further, consult BrightMove's sales team for guidance on the right number of child companies.

BrightMove has served customers with thousands of managed companies and millions of candidates, showcasing its scalability and efficiency. The platform efficiently handles extensive data and operations, ideal for diverse recruitment needs. BrightMove's **One Login** is a major advantage, streamlining operations, saving time, and cutting costs. This unique feature lets you manage all customers through a single platform, enhancing productivity and efficiency. **One Login** offers a unified solution for all your customers in a single, convenient interface.



## SUBJECT AREA INTEGRATION & CUSTOMIZATION

**20. Are custom fields supported for candidate, job or workflow records (and if so, is there a limit on how many can be created at one time)?**

**Yes. There is no limit on custom fields.**

BrightMove supports custom fields for candidate, job, and workflow records. These custom fields can be tailored to capture specific information crucial to your recruitment operations. It's noteworthy that the candidate, job, and workflow configurations come with pre-configured "out of the box" settings to provide a starting point. This means you don't have to build everything from scratch; you can leverage these pre-existing settings as a foundation for your customization efforts.

While there is no specific technical limit on the number of custom fields you can create, it's recommended to consider usability and data management factors. These fields are 100% configurable by you or a member of your organization. If you require assistance or guidance on setting up custom fields, BrightMove's support team is readily available to offer valuable insights and assistance.

The screenshot shows the 'View Section' configuration page for 'WHCG Onboarding'. It includes toggle switches for 'Candidate', 'Job', 'Department', 'Placement', 'Manager', 'Reference Check', and 'Location'. The 'Placement' toggle is currently turned on. Below these toggles is a table titled 'Fields Defined for this section' with columns for 'Sort', 'Field Name', 'Field Type', 'Required', and 'Actions'. Two fields are listed: 'Onboarding Team' (Select Drop Down, Not Required) and 'Onboarding Cost Center' (Text, Not Required). Each field has 'View', 'Edit', and 'Delete' action buttons. An 'Add Field' button is located at the top right of the table.

Sort	Field Name	Field Type	Required	Actions
	Onboarding Team	Select Drop Down	No	<a href="#">View</a> <a href="#">Edit</a> <a href="#">Delete</a>
	Onboarding Cost Center	Text	No	<a href="#">View</a> <a href="#">Edit</a> <a href="#">Delete</a>

**UDFs can be configured based on your needs!**  
**There is no technical limit on the number of sections, fields or options for UDFs.**

## SUBJECT AREA INTEGRATION & CUSTOMIZATION

### 21. How customizable are the hiring workflows and can they support forced/fixed stage progression (to prevent missed/skipped steps)?

**The Submittal Workflow is completely customizable rules engine for you or your customer's hiring workflow.**

The "hiring workflow," you mentioned, is BrightMove's "submittal workflow." It's highly customizable, aligned with your needs. Each child company in BrightMove for RPO has its unique submittal workflow, allowing enforced progression through stages and statuses. This maintains a structured process, with automations tied to changes, ensuring consistency and accuracy in tracking progress.

→ Submittal Workflow [Back to Settings](#)

DEFAULTS **STATUSES** ACTIVITY TYPES ACTIVITY TRIGGERS ACTIVITY TEMPLATES

Submittal Statuses

Show 10 entries Search:

Display Order	Name	Manager View	Placement	Decline	Report Submittal	Report TTH	Quality	Candidate Template	Manager Template	Recruiter Template	Sourcer Template	Sales Template	Actions
1	Applied to Job	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>						<a href="#">Edit</a> <a href="#">In Use</a>
2	Sourced	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>						<a href="#">Edit</a> <a href="#">In Use</a>
3	1st Attempt	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>						<a href="#">Edit</a> <a href="#">In Use</a>
4	2nd Attempt	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>						<a href="#">Edit</a> <a href="#">Delete</a>





# Implementation & Training

Award-winning customer support & onboarding.

## SUBJECT AREA IMPLEMENTATION & TRAINING

### 22. Can the system be configured without the assistance of technical support?

**Yes.**

BrightMove's system is intentionally designed for user-friendliness, allowing users to configure and customize aspects of the platform without requiring technical support. The platform's intuitive interface and user-centric design empower you to set up workflows, customize fields, and manage various settings effortlessly. While technical support is available for more intricate configurations or guidance, many customization tasks can be autonomously completed. This empowers users to seamlessly tailor the system to their organization's needs.

We're proud to note that BrightMove's support team, renowned for their award-winning expertise, is readily accessible to offer assistance and guidance as needed.

**Our #1 goal is to create software that our customers love to use.**



## SUBJECT AREA IMPLEMENTATION & TRAINING

### 23. Does a sandbox instance exist as part of your solution?

**Yes.**

BrightMove offers a sandbox instance as part of its solution. This sandbox environment serves as a dedicated space where you can test, experiment, and preview changes without affecting your live production data. It enables you to assess new configurations, workflows, and settings in a controlled environment, ensuring that any adjustments made in the sandbox do not impact your active recruitment operations. This feature is valuable for safeguarding the integrity of your live data while allowing you to refine and optimize your processes before implementing changes.



# Client References

**BrightMove partners with some of the most respected RPOs in the world.**

## SUBJECT AREA CLIENT REFERENCES



### Customer Profile

- Headquartered in Jacksonville Beach, FL
- Founded in 1996
- 16x Best Workplaces by Great Places to Work
- 6x by HRO Today Baker's Dozen
- 4x Best RPO Client Satisfaction by ClearlyRated
- 4x Exceptional Workplaces by Gallup
- No. 3494 on Inc. 5000

### Products Deployed

- BrightMove for RPO Enterprise
- Nightly Analytics Feed
- SenseHQ Integration



### BrightMove for RPO customer for 11+ years (2012)



<https://hueman.com>

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## SUBJECT AREA CLIENT REFERENCES



Workforce Solutions  
HELPING PEOPLE SUCCEED.

### Customer Profile

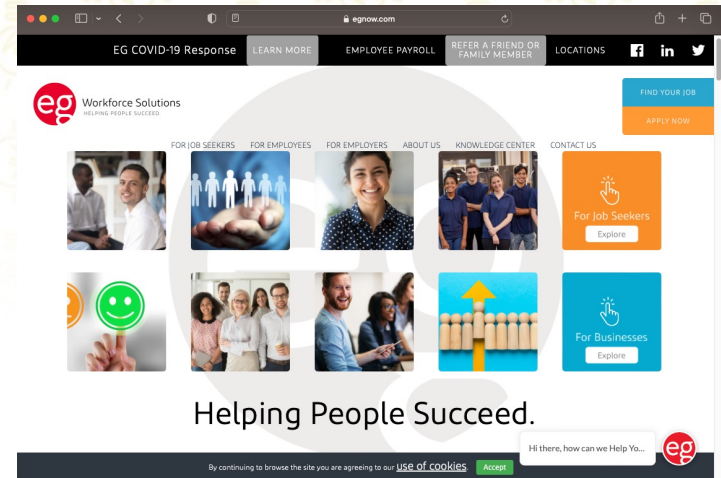
- Headquartered in Battle Creek, MI
- Founded in 1958
- Top Staffing Companies to Work for 2022

### Products Deployed

- BrightMove for RPO Enterprise
- Wisdom Enterprise
- Backoffice Enterprise
- SenseHQ Integration



### BrightMove for RPO customer for 7+ years (2016)



Helping People Succeed.

<https://egnow.com>

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## SUBJECT AREA CLIENT REFERENCES

# SOURCE2™

### Customer Profile

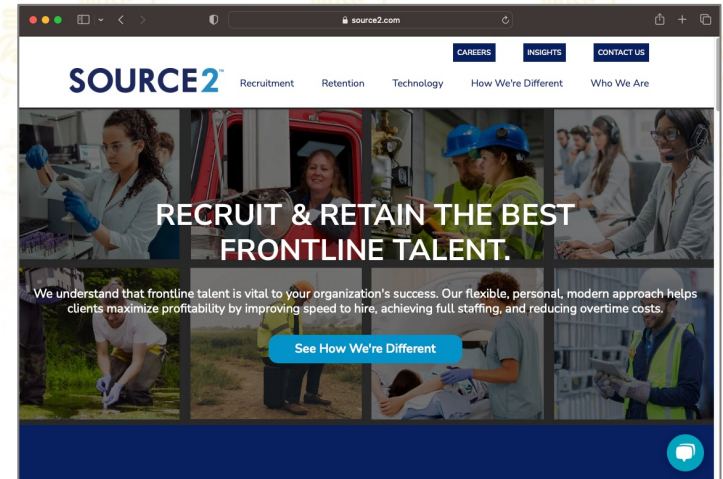
- Headquartered in Winter Park, FL
- Founded in 1999
- 4x Top Places to Work by Orlando Sentinel

### Products Deployed

- BrightMove for RPO Enterprise
- Nightly Analytics Feed
- SenseHQ Integration



### BrightMove for RPO customer for 12+ years (2011)



<https://source2.com>

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# Wrap Up

**Thank you for the opportunity to deliver this RFI response.**

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