

REQUISITIONING OVERVIEW



MSITE REQUISITIONING



What is MSite Requisitioning?

MSite Requisitioning enables project users to advertise specific roles to targeted contractors for designated sites, ensuring each project has the necessary headcount with the required skill set.

MSITE REQUISITIONING



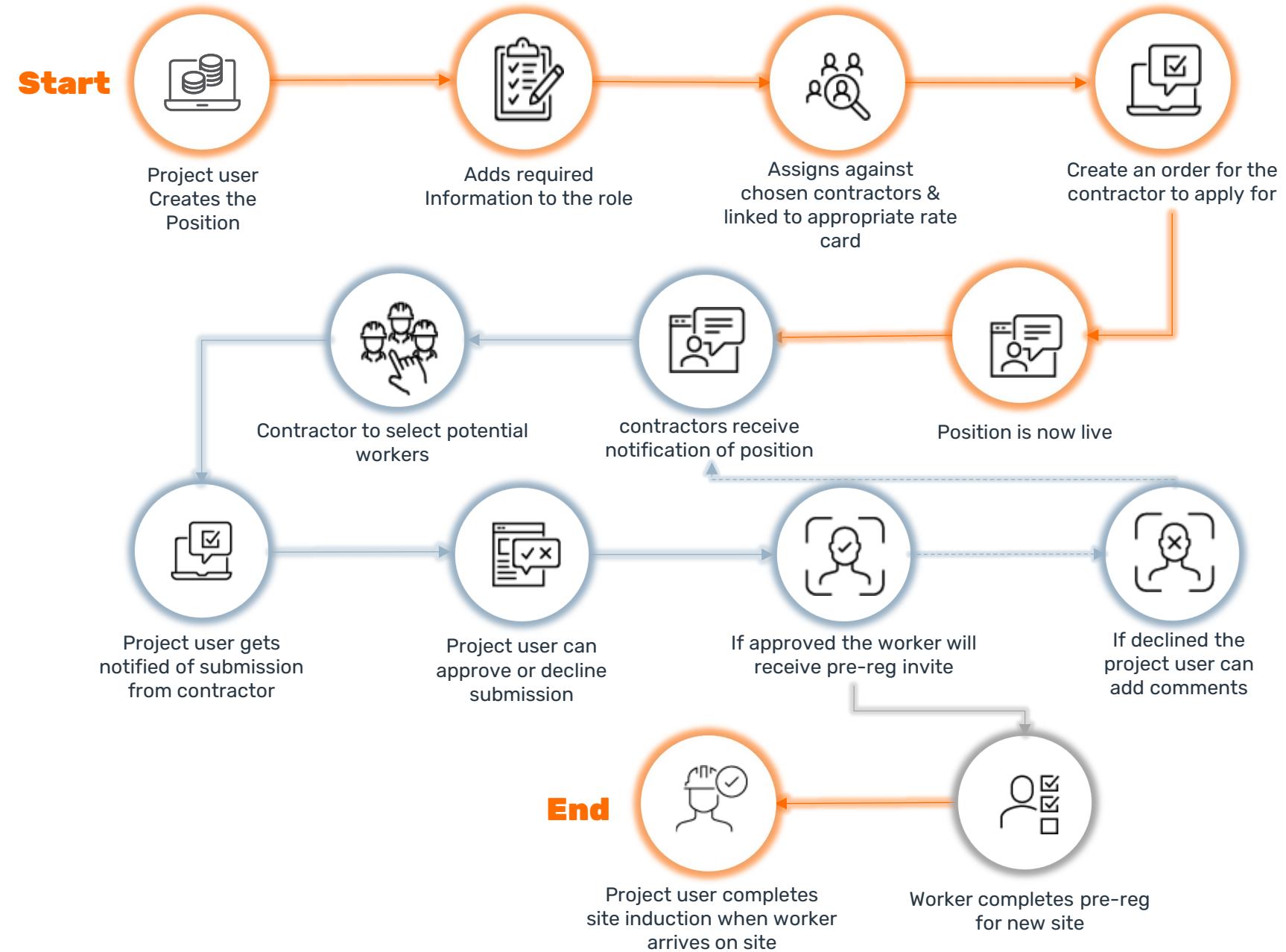
How it works

- The project user can create an available position by specifying the site, contractor, and required skill set for the role.
- Contractors can then review the available roles and propose suitable members of their workforce for consideration.
- The project user will be notified and can assess whether the proposed worker meets the requirements.
- If the worker meets the criteria, the project user can approve them. If not, they can decline the application or request additional information.

REQUISITIONING MODEL

Full Requisitioning Journey

The steps in **Orange** are associated to the Project User, **Blue** are Contractor related and the step in **Grey** refers to the worker.

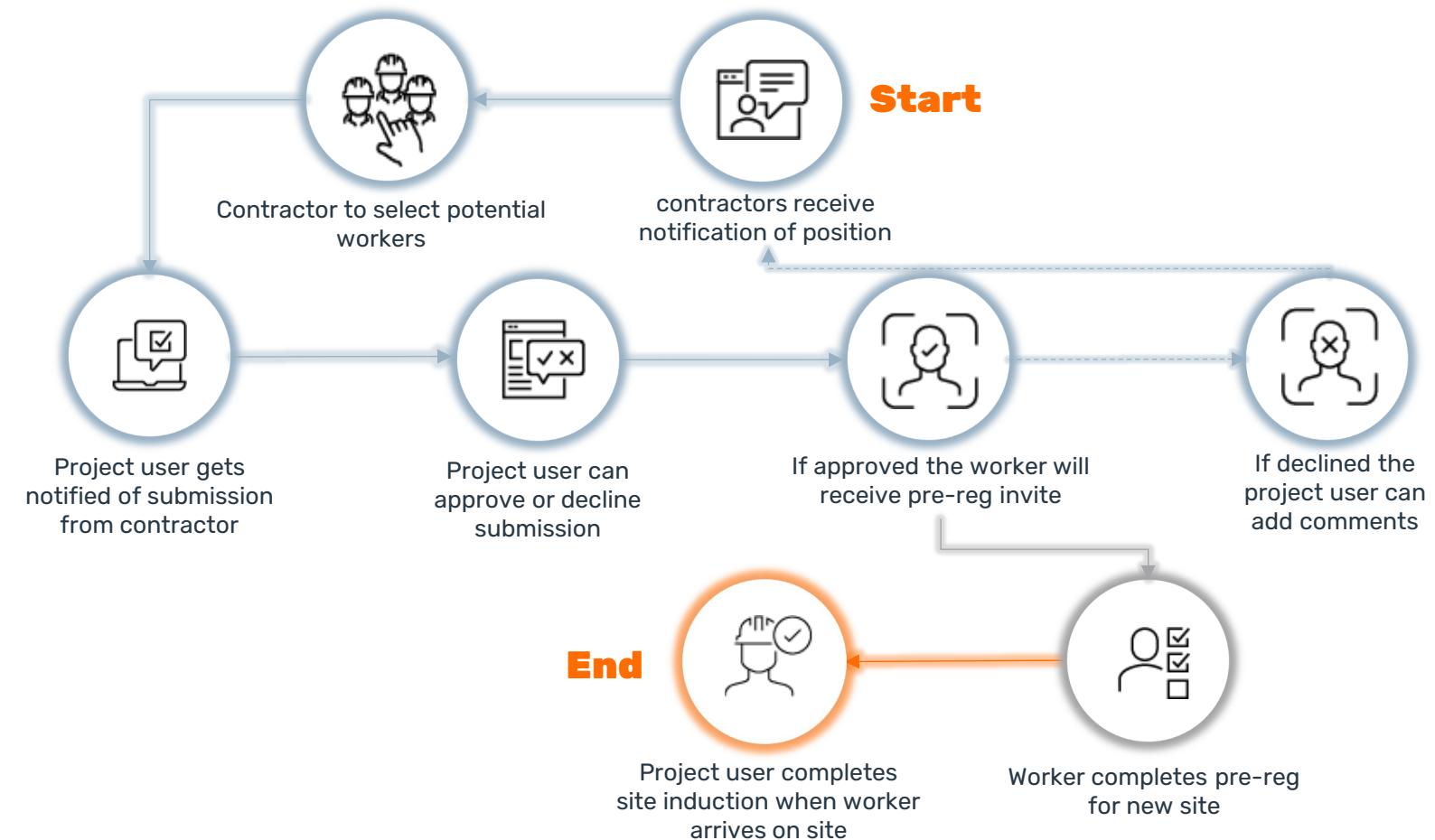


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REQUISITIONING MODEL

Contractor Journey Process

These are the steps in which are associated to the Subcontractor in order to apply for a position.



ADDING A POSITION

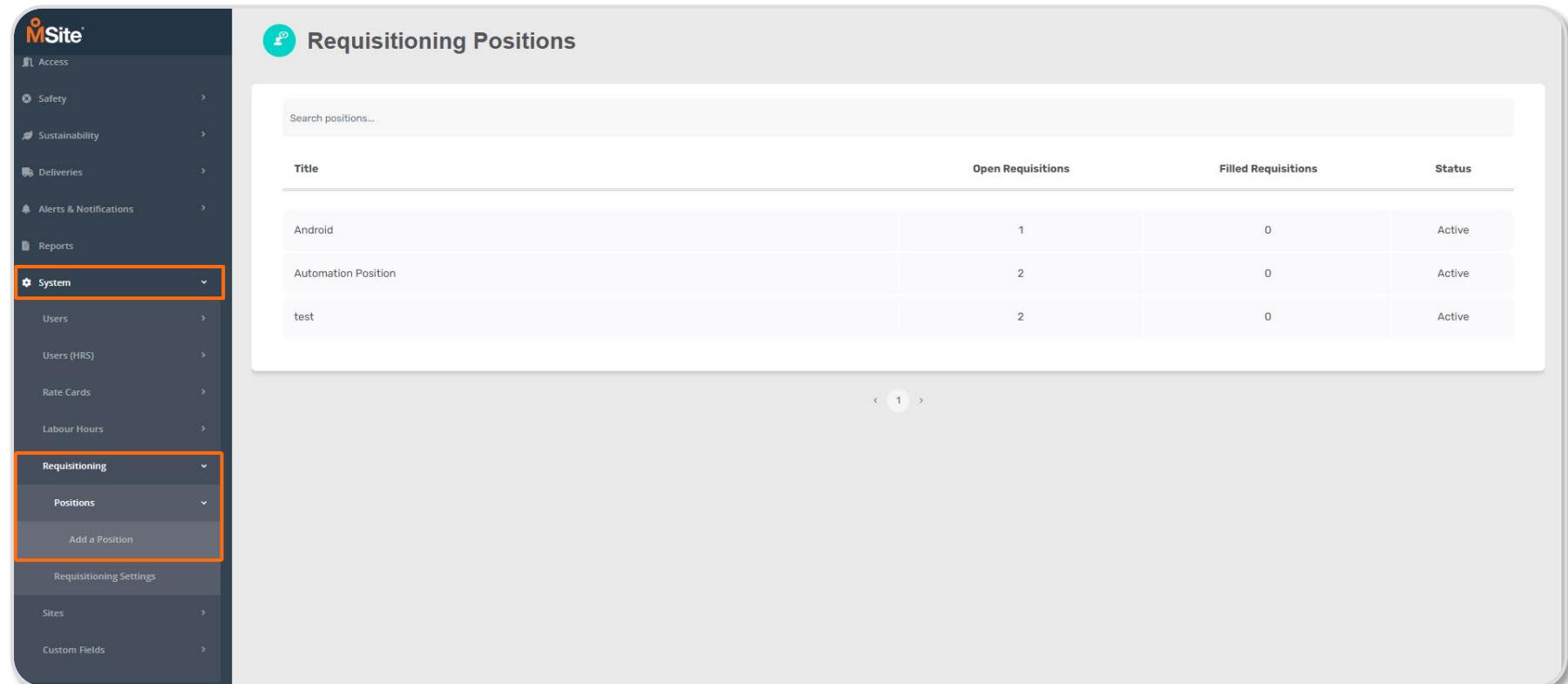
ADDING A POSITION

Add A Position

This is how the **Project User** will add position that the requisition will be aligned against.

In the **MSite Toolbar** on the left, select:

- **System** ➔ **Requisitioning** ➔ **Positions** ➔ **Add Position**



The screenshot shows the MSite software interface. On the left, the **MSite Toolbar** is visible with the following navigation structure:

- Access
- Safety
- Sustainability
- Deliveries
- Alerts & Notifications
- Reports
- System** (selected, highlighted with an orange box)
- Users
- Users (HRS)
- Rate Cards
- Labour Hours
- Requisitioning** (selected, highlighted with an orange box)
- Positions** (selected, highlighted with an orange box)
- Add a Position** (highlighted with an orange box)
- Requisitioning Settings
- Sites
- Custom Fields

The main screen is titled **Requisitioning Positions**. It features a search bar at the top labeled "Search positions...". Below the search bar is a table with the following data:

Title	Open Requisitions	Filled Requisitions	Status
Android	1	0	Active
Automation Position	2	0	Active
test	2	0	Active

ADDING A POSITION

Position Detail

Here you will enter the necessary information relating to the desired position.

Here, you will need to state all the desired information relating to the position you wish to create, including information such as:

- **Knowledge, Skills & Experience**
- **Minimum competencies** that are required
- **Essential qualifications** that are required to apply for the created position



The screenshot shows a 'Position Detail' form. The main area contains fields for 'Title' (marked with a red asterisk), 'Knowledge, Skills & Experience', 'Minimum Competencies Required', and 'Essential Qualifications'. Below these is a checkbox labeled 'Requires Candidate Approval'. To the right, a sidebar titled 'Status' shows a dropdown menu set to 'Active', with 'Close' and 'Save' buttons at the bottom. The entire interface is framed by a light gray border.

Once you have entered all the all the desired information, you can select whether the roles require each candidate to be approved or not.

Then, click **Save** to complete the position.

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ADDING A REQUISITION

ADDING A REQUISITION

Add A Requisition

This is how the **Project User** will create a position that the selected contractors can submit their workforce for.

In the **MSite Toolbar** on the left, select:

- **Requisitioning** ➔ **Add a Requisition**
- Enter the required **Experience, Knowledge, Skills** and **Essential Qualifications** that are desired for this position

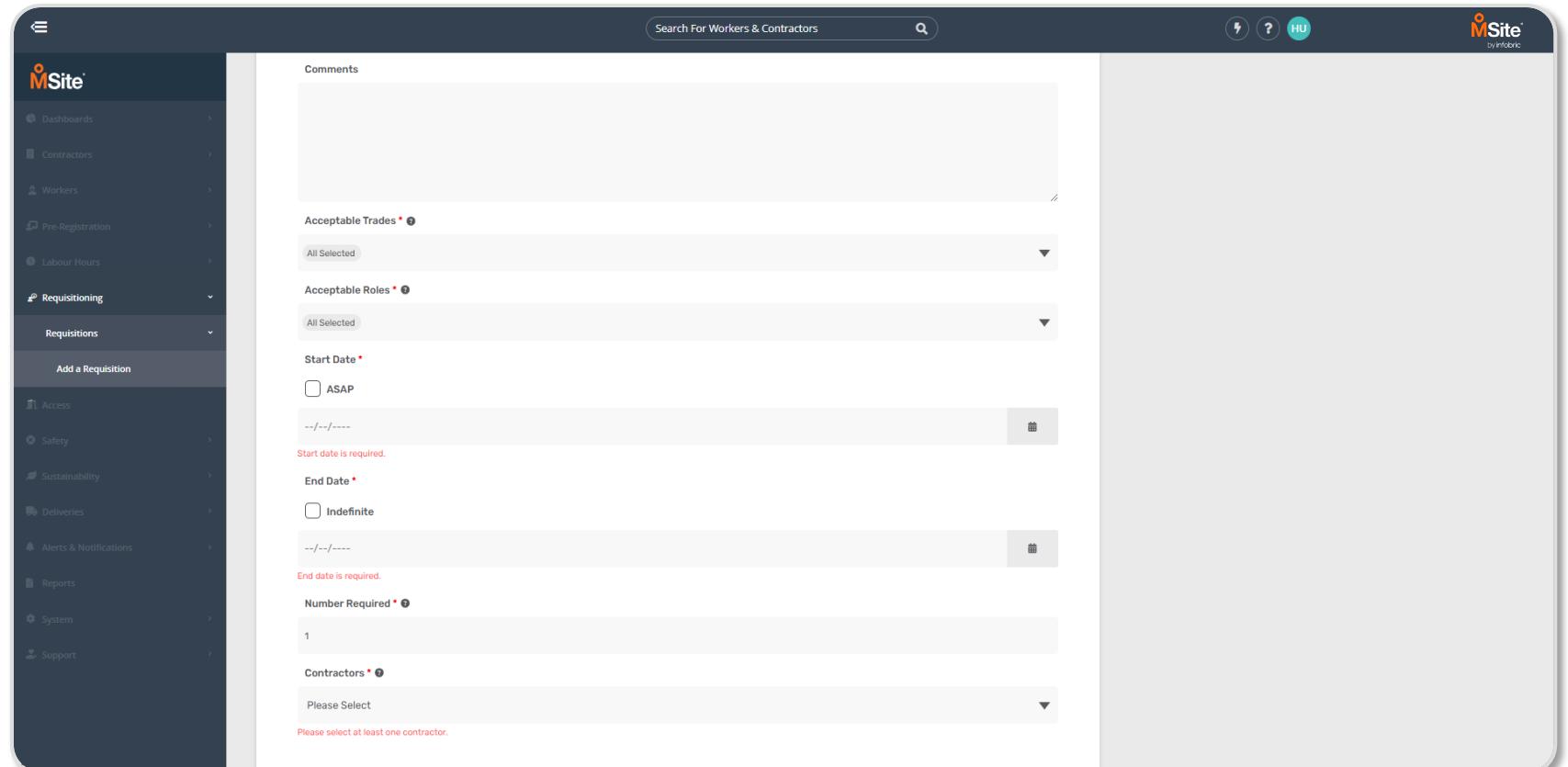
The screenshot shows the MSite software interface. The left sidebar, titled 'MSite', contains a navigation menu with items like 'Dashboards', 'Contractors', 'Workers', 'Pre-Registration', 'Labour Hours', 'Requisitioning' (which is expanded to show 'Requisitions' and 'Add a Requisition'), 'Access', 'Safety', 'Sustainability', 'Deliveries', 'Alerts & Notifications', 'Reports', 'System', and 'Support'. The 'Add a Requisition' button is highlighted with an orange box. The main content area is titled 'Requisitions' and includes filters for 'Projects', 'Positions', and 'Contractors', each with a 'All Selected' option. Below these filters are buttons for 'All' (1), 'Unpublished' (0), 'Published' (0), 'Awaiting Spend Approval' (0), 'Awaiting Worker Approval' (1), 'Filled' (0), and 'Archived' (0). A table below shows a single requisition entry: ID 1, Project Test Site, Position Approval, Added Date 27/11/2024, Start Date ASAP, Filled 0/5, Contractors 148, and Status Awaiting Worker Approval. The bottom of the sidebar has a copyright notice: '© Copyright 2024 msite.com'.

ADDING A REQUISITION

Requisition Details

The **Project User** can select any acceptable trades that they want the position to be open to, along with position specific start/end dates.

- Select the **Trades & Roles** that you want this position to be open to
- Provide the **start and end dates**, the **number of positions** needed, and the **Contractors** these positions will be assigned to



The screenshot shows the 'Add a Requisition' page in the MSite software. The left sidebar has a dark theme with orange highlights for 'Requisitions' and 'Add a Requisition'. The main form has a light background with dark input fields. The 'Comments' section is empty. The 'Acceptable Trades' dropdown is set to 'All Selected'. The 'Acceptable Roles' dropdown is set to 'All Selected'. The 'Start Date' field has 'ASAP' selected. The 'End Date' field has 'Indefinite' selected. The 'Number Required' field contains the number '1'. The 'Contractors' dropdown is set to 'Please Select'. Error messages 'Start date is required.' and 'End date is required.' are displayed in red below the respective date fields.

- To finalise the position, select the **rate card** that it will be assigned against and change the status to **Published**
- Then, click **Save**



ADDING AN ORDER

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ADDING AN ORDER

Add Order

The **Project User** will add an order and select the desired **contractors** that can invite their workforce to apply for the positions.

The **Project User** will also stipulate the **Currency, Effective & Expiry Dates** of the position.

In the **MSite Toolbar** on the left, select:

- System ➔ Labour Hours ➔ Orders ➔ Add Order

The screenshot displays the 'Add Order' dialog box. The main form contains the following data:

Field	Value
Project *	Test Site
Contractor *	Mylchreest Windows
Order No. *	5
Currency *	£GBP
Value *	500
Effective Date *	09/12/2024
Expiry *	<input checked="" type="checkbox"/> Indefinite

On the right side, a status panel provides summary information:

Status	Value
Active	-----
Added	-----
Value	£----
Spend	£----
Balance	£----
Spend %	--

At the bottom of the dialog are 'Close' and 'Save' buttons.

- Fill in requested information, including the **contractors** you wish the order to be sent to.
- Once complete, click **Save**

REQUISITIONING SETTINGS

REQUISITIONING SETTINGS

Settings

Here, you can set some specific settings relating to Requisitioning.



In the **MSite Toolbar** on the left, select:

- **System ➔ Requisitioning ➔ Requisitioning Settings**
- Set whether Requisitions require approval and the value that an order will require approval
- Choose if contractors with insufficient order value can apply & minimum time required

The screenshot shows the 'Requisitioning Settings' page within the MSite application. The left sidebar lists various system settings like Alerts & Notifications, Reports, System (selected), Users, Users (HRS), Rate Cards, Labour Hours, Requisitioning (selected), Positions, and Requisitioning Settings. The main content area is titled 'Requisitioning Settings' and contains the following configuration:

- Requisitions Require Approval:** A checkbox is checked. Below it, a dropdown menu shows 'Greater than or Equal to Requisition Value *' with a value of '0.00' and a 'Currency *' dropdown set to '£GBP'. A 'Add Currency' link is also present.
- Contractors with Insufficient Order Value:** A radio button is selected for 'Block from adding Workers to Requisitions'.
- Indefinite Requisitions Require Minimum of:** A dropdown menu shows '1 Weeks'.
- Auto-archive Filled Requisitions after:** A dropdown menu shows '28 Days'.

At the bottom right are 'Cancel' and 'Save' buttons.



CONTRACTOR VIEW

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CONTRACTOR VIEW

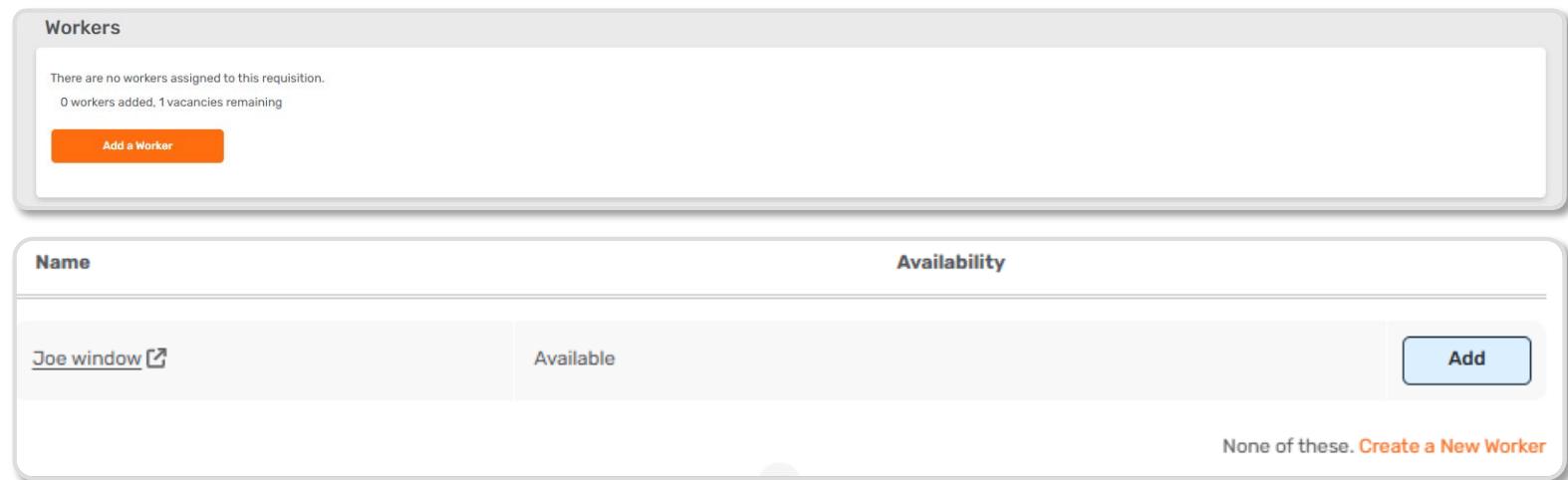
Requisition Email

Once the **Project User** has completed the **Position & Order**, the selected contractors will receive an email notification to inform that they can propose workers for a new requisition.

Once the contractor has clicked on the **invitation link**, they will be presented with the **Requisition Detail** screen on MSite. Containing information such as:

- **Project Name**
- **Position**
- **Knowledge, Competencies & Essential Qualifications**
- **Start Date & Expected End Date**

The **contractor** can now add workers who are eligible for the advertised position for review by the **Project User**.



The screenshot shows the 'Workers' section of the MSite interface. At the top, a message states: 'There are no workers assigned to this requisition. 0 workers added, 1 vacancies remaining'. Below this is an 'Add a Worker' button. The main table lists a single worker: 'Joe window' with a edit icon, 'Available' status, and an 'Add' button. A note at the bottom right says: 'None of these. [Create a New Worker](#)'.

Name	Availability	
Joe window	Available	Add

If the worker already has an **MSite account**, they will be listed. You can also create a new worker from this stage if required.

RECEIVING AN APPLICATION

RECEIVING AN APPLICATION

Accept or Decline

Now that the **Contractor** has listed a worker against the position, the **Project User** can review the recommended worker and **accept** or **decline**.

This can be set to automatically approve if required.

The **Project User** will be able to see the workers recommended for the **Position**, where they can **accept** or **decline** the recommendation from the contractor.

Name	Contractor	Agency Rate	Induction Date	Date Added ▲	Approval	Pre-Registration
Joe window	Mythicrest Windows	£ 25.00	--/--/----	03/12/2024 14:43	Waiting	<button>Review</button>

0 workers added. 1 vacancies remaining

[Add a Worker](#)

Accepting the worker will lead the **Project User** to confirm the **Rate Card** and **Payroll Type** for the worker as well as giving an insight into the projected spend of the order.

Joe window

Payroll Type *

PAYE

Rate Card *

Rate Card £

Hourly Pay Rate 20 GBP/hr

Hourly Agency Rate 25 GBP/hr

Orders (as at 10:00 02/12/2024)

Your order balance at the close of the last reporting week for this project is shown below.

Balance (Order No. 5)	£ 300.00
Total Remaining Balance	£ 300.00

Projected Spend

Other Requisitions	£ 0.00
This worker (03/12/2024 - 10/12/2024)	£ 1,000.00
Total Projected Spend	£ 1,000.00

Remaining Order Cover £ -700.00

[Choose a different worker](#) [Add Worker](#)

FAQs



Q. When all the vacancies for a requisition have been filled, can more workers be added?

A. No. When all vacancies have been filled, users will no longer be able to add workers to the requisition, unless a worker is removed from one of the vacancies, at which point, that vacancy will become available again.

Q. Can contractors add orders to the system?

A. No - orders can only be opened by users belonging to the principal contractor.

Q. Is it possible to add more than one contractor to a requisition?

A. Yes - multiple contractors can be added to a single requisition.

Q. Is it possible to block contractor users with an insufficient order value from adding workers to requisitions?

A. Yes - It is possible to block contractors from adding workers to requisitions if they have an insufficient order value. This can be configured on the Requisitioning Settings page.



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