

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

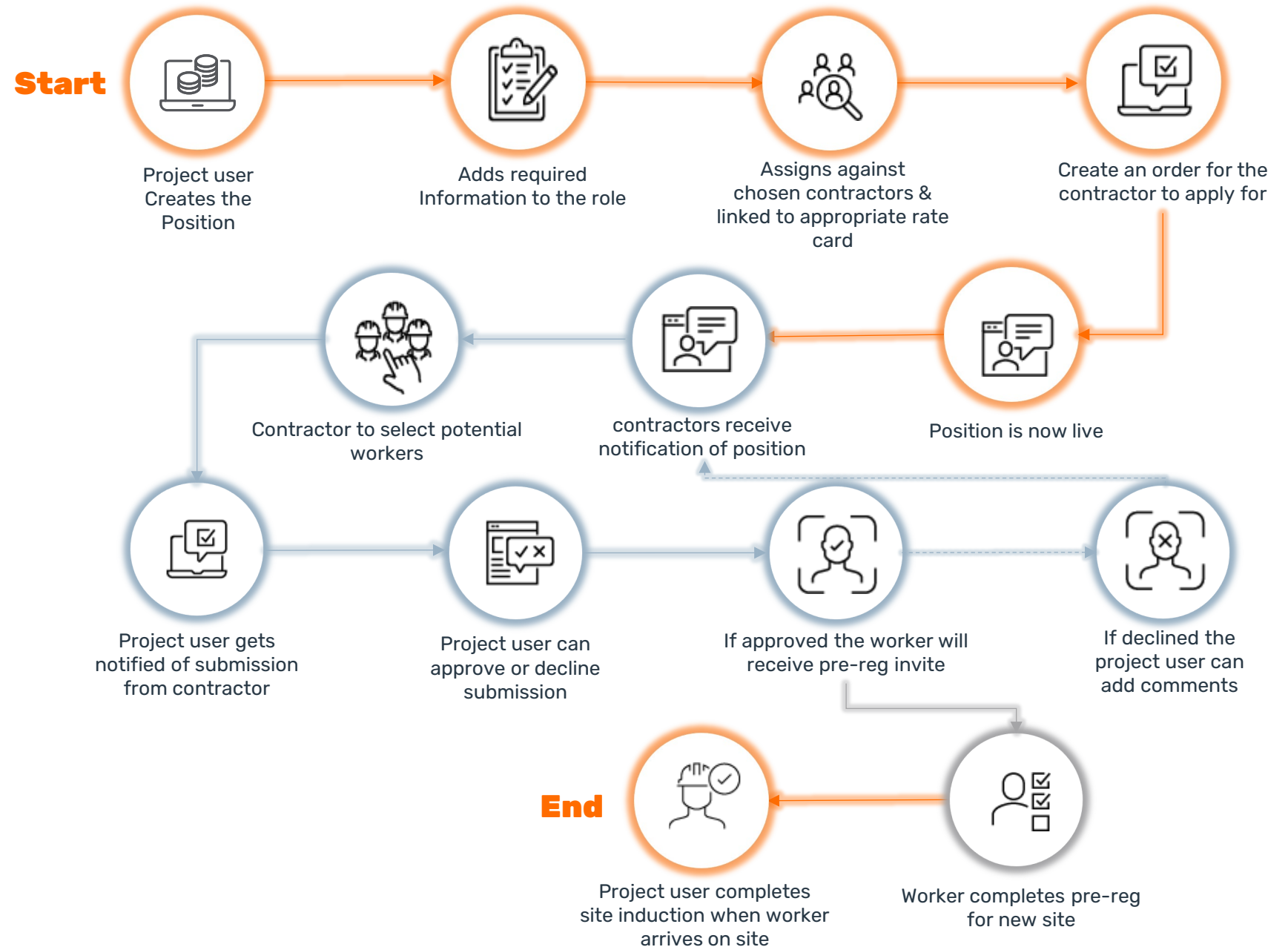
How it works

- 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

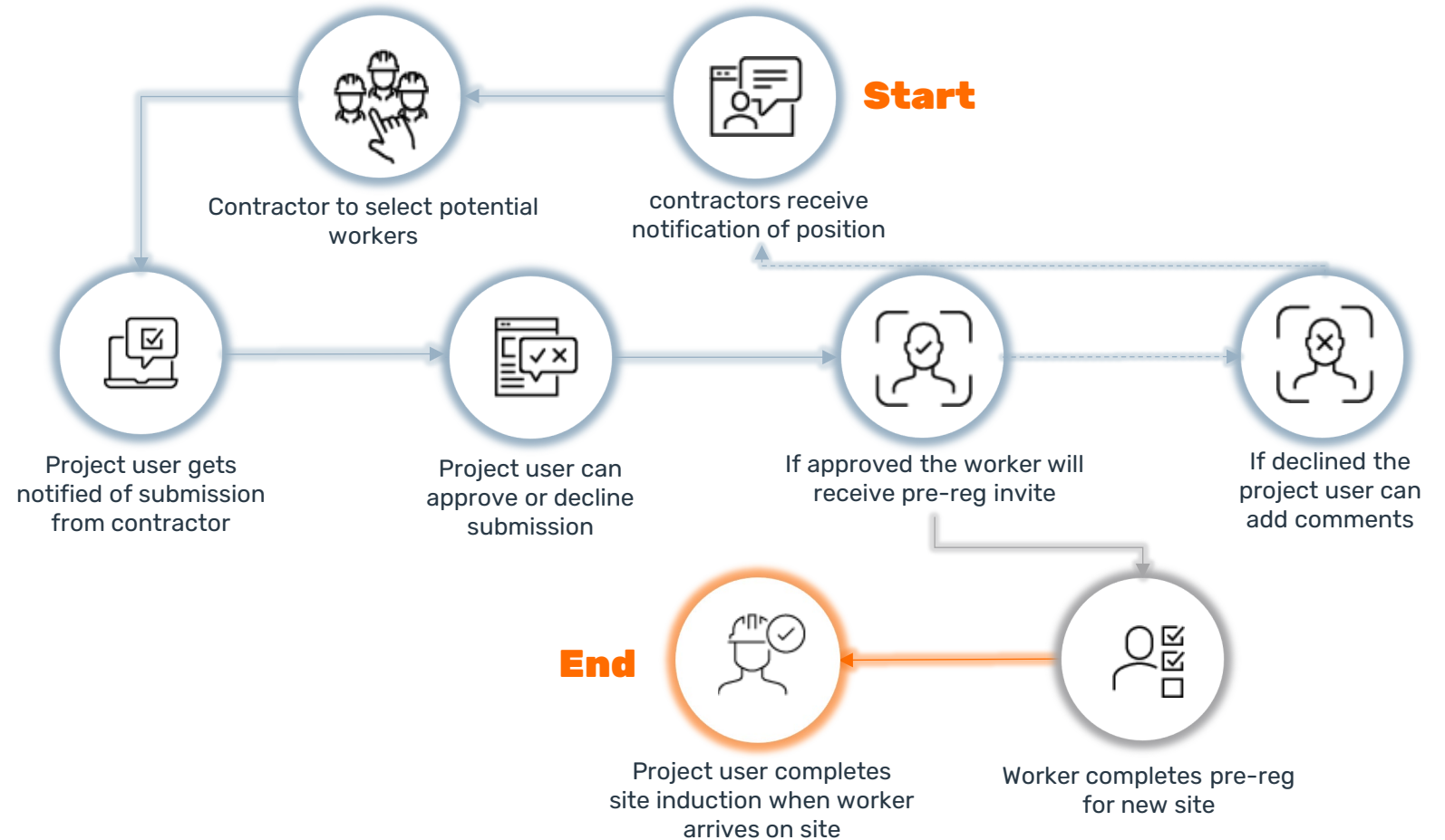
The steps in **Orange** are associated to the Project User, **Blue** are Contractor related and the step in Grey refers to the worker.



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

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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**

MSite

Access

Safety

Sustainability

Deliveries

Alerts & Notifications

Reports

System

Users

Users (HRS)

Rate Cards

Labour Hours

Requisitioning

Positions

Add a Position

Requisitioning Settings

Sites

Custom Fields

Requisitioning Positions

Search positions...

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

< 1 >

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

Position Detail

Title *

Knowledge, Skills & Experience

Minimum Competencies Required

Essential Qualifications

☐ Requires Candidate Approval

Status

Status *

Active

Close Save

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

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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 displays the MSite Requisitions dashboard. On the left is a dark sidebar with the MSite logo and a menu including Dashboards, Contractors, Workers, Pre-Registration, Labour Hours, Requisitioning (highlighted), Requisitions (highlighted), Add a Requisition, Access, Safety, Sustainability, Deliveries, Alerts & Notifications, Reports, System, and Support. The main content area is titled 'Requisitions' and features a search bar at the top right. Below the title are three dropdown filters for Projects, Positions, and Contractors, all set to 'All Selected'. A row of seven status cards follows: All (1), Unpublished (0), Published (0), Awaiting Spend Approval (0), Awaiting Worker Approval (1), Filled (0), and Archived (0). Below these is a table with columns: ID, Project, Position, Added Date, Start Date, Filled, Contractors, and Status. The table contains one row with 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'. A pagination bar at the bottom shows '< 1 >'. The footer of the sidebar contains the copyright notice '© Copyright 2024 msite.com'.

ID	Project	Position	Added Date	Start Date	Filled	Contractors	Status
1	Test Site	Approval	27/11/2024	ASAP	0/5	148	Awaiting Worker Approval


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' form in the MSite application. The left sidebar contains a navigation menu with options: Dashboards, Contractors, Workers, Pre-Registration, Labour Hours, Requisitioning (selected), Requisitions, Add a Requisition, Access, Safety, Sustainability, Deliveries, Alerts & Notifications, Reports, System, and Support. The main form area has a 'Comments' section at the top. Below it are two dropdown menus for 'Acceptable Trades' and 'Acceptable Roles', both currently set to 'All Selected'. The 'Start Date' section has a radio button for 'ASAP' and a date picker field showing '--/--/----' with a calendar icon; a red error message 'Start date is required.' is displayed below. The 'End Date' section has a radio button for 'Indefinite' and a date picker field showing '--/--/----' with a calendar icon; a red error message 'End date is required.' is displayed below. The 'Number Required' field is a text input containing the number '1'. The 'Contractors' section has a dropdown menu currently set to 'Please Select' with a downward arrow; a red error message 'Please select at least one contractor.' is displayed below. The top of the application has a search bar 'Search For Workers & Contractors', a user profile icon 'HU', and the MSite logo.

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



ADDING AN ORDER

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Add Order

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

- System ➡ Labour Hours ➡ Orders ➡ Add Order

- 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 MSite Requisitioning Settings page. On the left is a dark sidebar with the MSite logo and a menu including Alerts & Notifications, Reports, System (expanded), Users, Users (HRS), Rate Cards, Labour Hours, Requisitioning (expanded), Positions, Requisitioning Settings (selected), Sites, Custom Fields, Worker Roles, Induction Types, Contractor Groups, Mobile Devices, Materials, and Local Labour Postcodes. The main content area is titled 'Requisitioning Settings' and contains the following settings:

- Requisitions Require Approval:** A checked checkbox. Below it, a text input field 'Greater than or Equal to Requisition Value' contains '0.00'. To its right is a 'Currency' dropdown menu showing '£GBP'. Below these is a red 'Add Currency' link.
- Contractors with Insufficient Order Value:** Three radio button options: 'Do Nothing', 'Warn', and 'Block from adding Workers to Requisitions' (which is selected).
- Indefinite Requisitions Require Minimum of:** A dropdown menu showing '1' and a unit selector showing 'Weeks'.
- Auto-archive Filled Requisitions after:** A dropdown menu showing '28' and a unit selector showing 'Days'.

At the bottom right of the settings area 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**.

Workers

There are no workers assigned to this requisition.
0 workers added, 1 vacancies remaining
[Add a Worker](#)

Name	Availability	
Joe window 	Available	Add
None of these. Create a New Worker		

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

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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	Mychreest Windows	£ 25.00	---	03/12/2024 14:43	Waiting	Review

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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