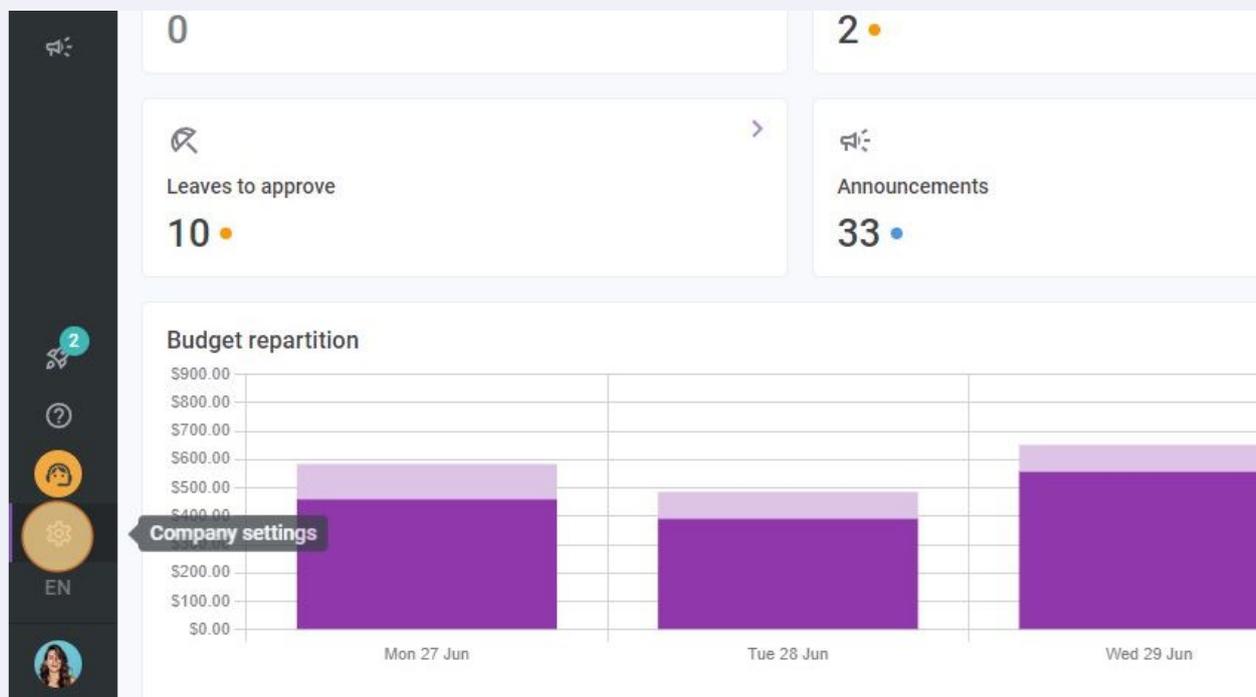


How to add a new advanced invitation rule



1 Navigate to the Voilà! web console <https://console.voila.app/en>

2 Click on the Company settings icon.



3 Select Invitation & Assignment.

My Company

General Settings
Manage your company name, time zone, supported languages, managers and admins permissions as well as your confidential information entered.

Organizational Structure
Define your company's management levels and the structure of its divisions, teams, positions, locations and sub-locations.

Scheduling Settings

Schedules and Availability
Define the types of events supported, the week's starting day, work constraints and automated schedule publishing settings. Define if employees can modify their availability and if those changes must be approved by a manager.

Invitation & Assignment
The following settings apply to the entire company and will be used by default when creating new shifts or replacements. You can specify settings by team, position and / or location using custom permissions.

Employee Mobility
Define fallback teams, positions and locations for a shift invitation when no regular employee is available.

Payroll Settings

Payroll and Time Off
Set up the payroll periods, manage your time off types, overtime rules and shift premiums.

Time and Attendance
Configure timesheets, approve reminders and edit permissions. Activate web and mobile time clocks for specific teams, locations and positions.

4 Go into the Invitation & Assignment Priority section.

voilà! < Back to settings

General Settings
Organizational Structure
Schedules and Availability
Invitation & Assignment ^
Invitation Management
Invitation & Assignment Priority
Employee Mobility
Payroll and Time Off
Time and Attendance
Billing
Integrations

Invitation & Assignment

Invitation Management

The following parameters are applied to the whole company and will be used by default when creating new shifts or replacements.

Default Invitation Mode

Default invitation rule: **Everyone**

Force invitation mode
The specified invitation rule will be applied and can't be changed when creating a shift or replacement.

Custom Invitation Rules ?

Custom Rules Application
Management
CPE A
Maintenance
Ambulance Nurse Location 4
Cook Location B

5 Click on Add a new invitation rule.

Assignment
Assignment Priority

Define the priority for employees to be invited to a shift or a replacement. They also define the priority according to which employees interested in a shift will be assigned to it. A rule can be standard, or follow a custom workflow.

Assignment

Add a new invitation rule

Type
Advanced
Standard
Advanced
Standard
Standard
Advanced

1-6 of 6

6 Click on the Invitation modes bar.

Settings

Organizational Structure

Availability and Availability

Assignment

Management

Assignment Priority

Mobility

Time Off

Attendance

Invitation & Assignment Priority

Invitation rules are used to determine the priority for employees to be invited to a shift or a replacement. They also define the priority according to which employees interested in a shift will be assigned to it. A rule can be standard, or follow a custom workflow.

Invitation Rules & Assignment

Name ↑	Type
Every Locations	Advanced
Everyone	Standard
Last minute replacement	Advanced
Score	Standard
Seniority	Standard
Union A - Advanced Flow	Advanced

Add a new invitation rule

Select the rule type that you wish to create

Invitation modes
Standard

Standard invitation rules allow you to select a criteria on which to prioritize the people invited to a shift and to define the time between invitations. Voilà! takes care of the rest for you!

Cancel Next

7 Select Advanced.

Schedules and Availability

Invitation & Assignment

Invitation Management

Invitation & Assignment Priority

Employee Mobility

Payroll and Time Off

Time and Attendance

Billing

Integrations

also define the priority according to which employees interested in a shift will be assigned to it. A rule can be standard, or follow a custom workflow.

Invitation Rules & Assignment

Name ↑	Type
Every Locations	Advanced
Everyone	Standard
Last minute replacement	Advanced
Score	Standard
Seniority	Standard
Union A - Advanced Flow	Advanced

Add a new invitation rule

Select the rule type that you wish to create

Invitation modes

Standard

Standard

Advanced

Cancel Next

8 Click on Next.

to which employees interested in a shift will be assigned to it. A rule can be standard, or follow a custom workflow.

Assignment

Add a new invitation rule

Type
Advanced
Standard
Advanced
Standard
Standard
Advanced

Add a new invitation rule

Select the rule type that you wish to create

Invitation modes

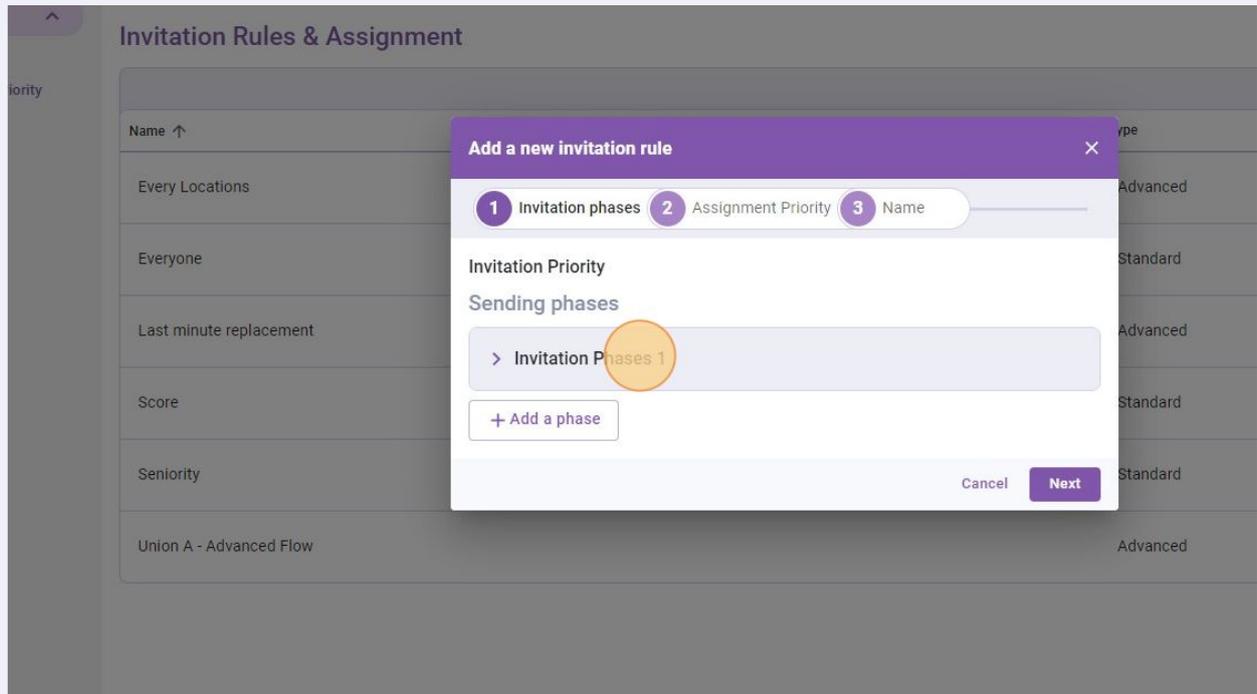
Advanced

Advanced Invitation rules allow you to create a fully customized invitation process based on your company's business rules.

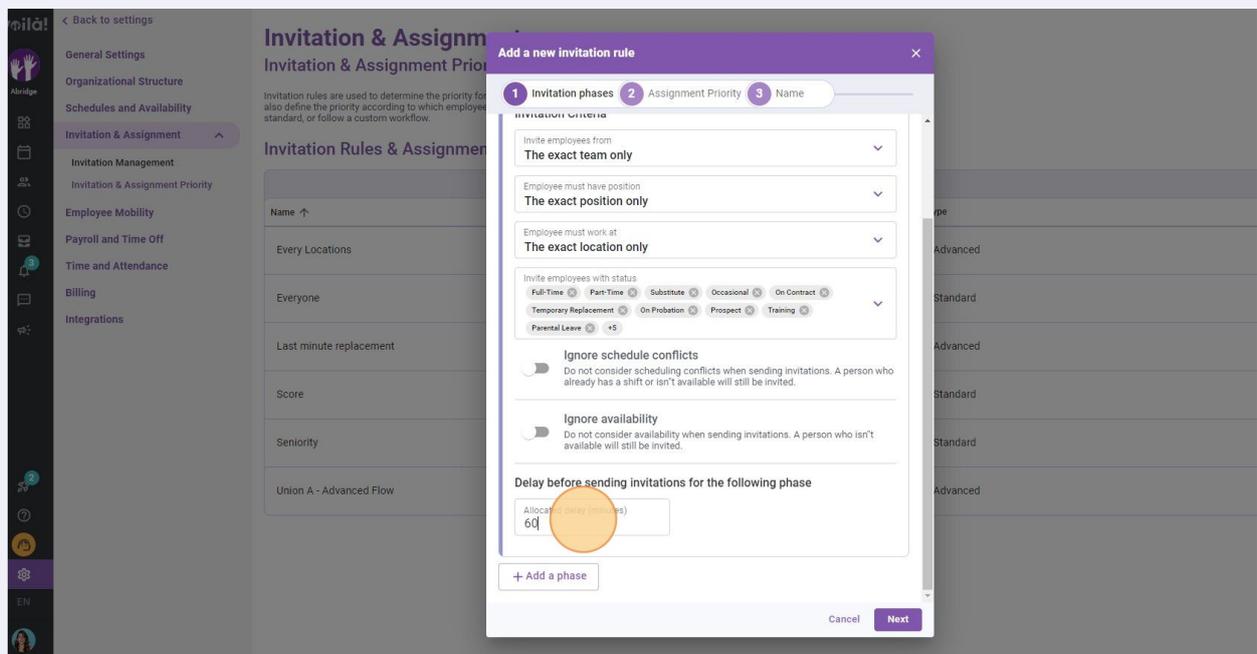
Cancel Next

1-6 of 6

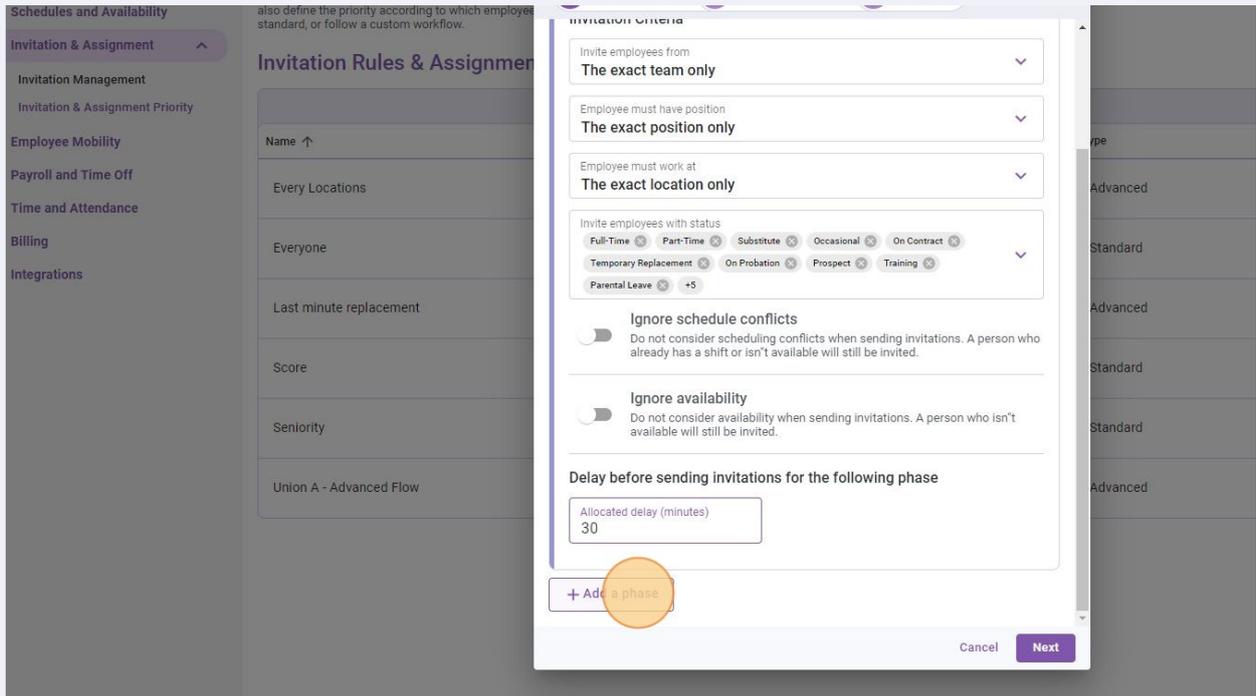
9 Select Invitation Phases 1.



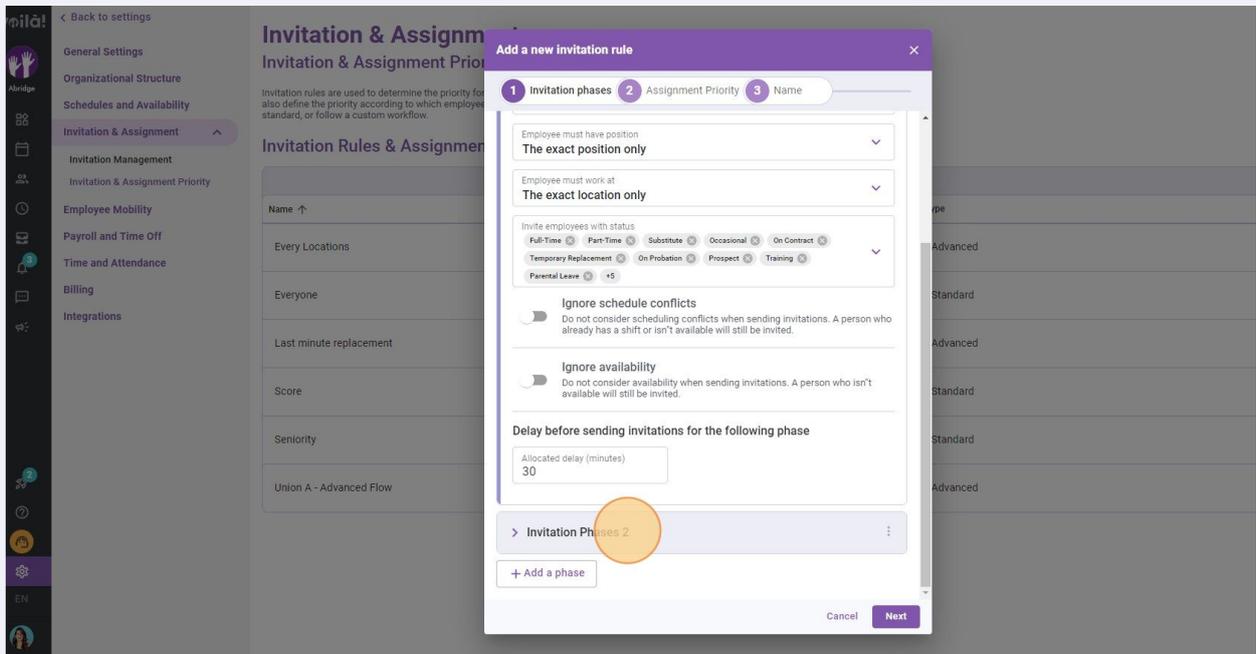
10 Select the invitation criterias of your choice and the delay before sending invitations for the following phase of your choice.



11 Click on Add a phase to add a phase.



12 Select Invitation Phases 2.



13 Select the desired Invitation criterias and click on Next.

Define the priority according to which employees interested in a shift will be assigned to it. A rule can be standard, or follow a custom workflow.

Invitation Criteria

Invite employees from
Include all teams

Employee must have position
Include all positions

Employee must work at
The exact location only

Invite employees with status
Full-Time Part-Time Substitute Occasional On Contract
Temporary Replacement On Probation Prospect Training
Parental Leave +5

Ignore schedule conflicts
Do not consider scheduling conflicts when sending invitations. A person who already has a shift or isn't available will still be invited.

Ignore availability
Do not consider availability when sending invitations. A person who isn't available will still be invited.

Delay before sending invitations for the following phase

Allocated delay (minutes)
60

+ Add a phase

Cancel Next

14 Select the Assignment Priority of your choice.

also define the priority according to which employees interested in a shift will be assigned to it. A rule can be standard, or follow a custom workflow.

Add a new invitation rule

1 Invitation phases 2 Assignment Priority 3 Name

Assignment Priority

Assignment Priority

1st level priority
1st level priority
Seniority (descending order)

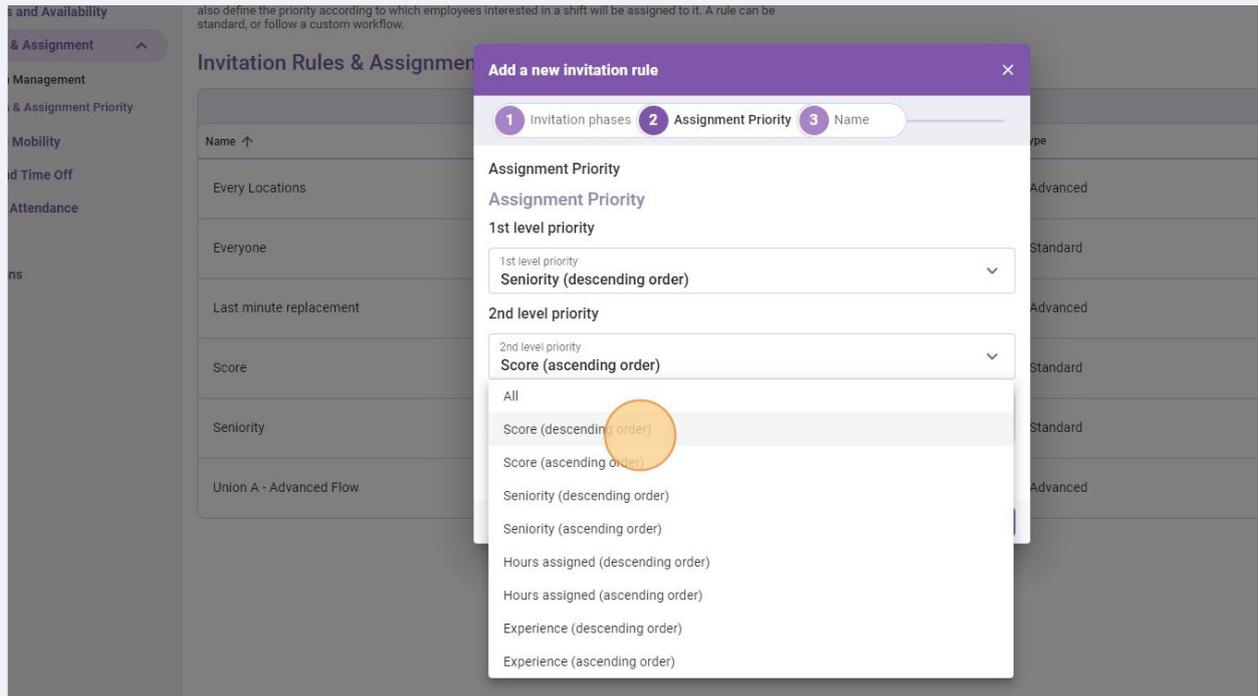
2nd level priority
2nd level priority
All

> Group 1 Group 1

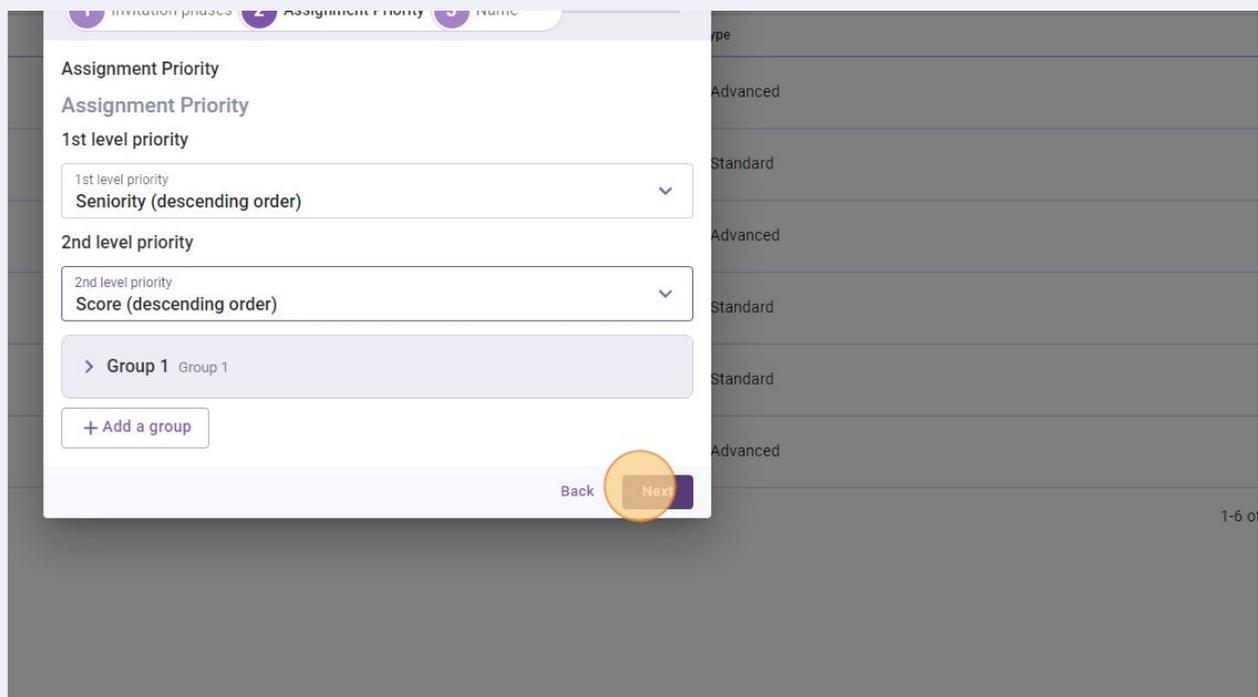
+ Add a group

Back Next

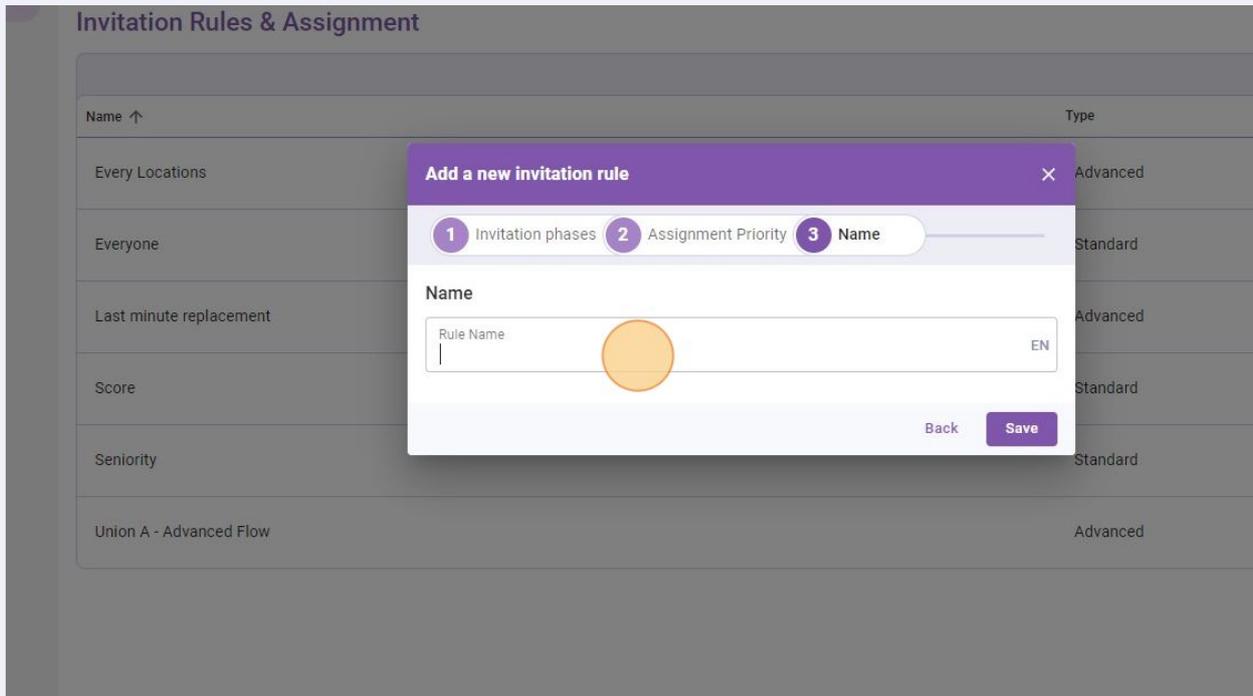
15 For this example we are going to select Score (descending order).



16 Click on Next.



17 Click on the Rule Name text bar and type a name of your choice.



18 Click on Save to apply the rule to your account.

