How to add a new Voila! advanced invitation rule

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



3

Select Invitation & Assignment.

My Company



4 Go into the Invitation & Assignment Priority section.

voilà!	< Back to settings	
	Conoral Sattings	Invitation & Assignment
***	General Settings	Invitation Management
Abridge	Organizational Structure	The following parameters are applied to the whole company and will be used by default when creating new
日合	Schedules and Availability	shifts or replacements.
	Invitation & Assignment	Default Invitation Mode
	Invitation Management	
2	Invitation Assignment Priority	Everyone
0	Employee Mobility	Force invitation mode
5	Payroll and Time Off	The specified invitation rule will be applied and can't be changed when creating a shift or replacement.
<u>a</u>	Time and Attendance	
	Billing	Custom Invitation Rules ②
	Integrations	Onders Dates Institution
র্কাং		
		✓ J⊥ Management
		✓ 2 ∠ CPE A
		✓ 2⊥ Maintenance
552		
0		🗸 22 Ambulance 🚔 Nurse 🛛 Cocation 4
		Cook Cock Cocation B

5

Click on Add a new invitation rule.

ssignment

ment Priority

nine the priority for employees to be invited to a shift or a replacement. They to which employees interested in a shift will be assigned to it. A rule can be cflow.

Assignment

Assignment		Add a new invitat	tion rule
	Туре		Q
	Advanced	1	Ō
	Standard	1	ō
	Advanced	1	Ō
	Standard	1	Ō
	Standard	1	Ō
	Advanced	1	Ō
		1-6 of 6 I< <	> >1

6 Click on the Invitation modes bar.

ttings onal Structure and Availability & Assignment & Assignment Priority Mobility	Invitation & Assignment Invitation rules are used to determine the p also define the priority according to which e standard, or follow a custom workflow. Invitation Rules & Assign Name ↑	Priority nority for employees to be invited to a shift or a replacement. They employees interested in a shift will be assigned to it. A rule can be nment	Туре
l Time Off Attendance	Every Locations	Add a new invitation rule	Advanced
S	Everyone	Select the rule type that you wish to create	Standard
	Last minute replacement	Standard Standard invitation rules of the two select a criteria on which to prioritize the people invited to a shift and to define the time between invitations. Voliàl takes care of the rest for you!	Advanced
	Score	Cancel Next	Standard
	Seniority		Standard
	Union A - Advanced Flow		Advanced

Select Advanced.

nvitation & Assignment	standard, or follow a custom workflow.	Inment	
mployee Mobility	Name 🛧		Туре
Payroll and Time Off	Every Locations	Add a new invitation rule X	Advanced
Billing	Everyone	Select the rule type that you wish to create	Standard
	Last minute replacement	Standard Y	Advanced
	Score	Advanced Cancel Next	Standard
	Seniority		Standard
	Union A - Advanced Flow		Advanced

8 Click on Next.

nto which employees interested in a shift will be assigned to it. A rule can be ridfow. Assignment		Add a new invitation rule
		٩
	Туре	
Add a new invitation rule	× Advanced	/ 0
Select the rule type that you wish to create	Standard	/ 0
Invitation modes Advanced Advanced invitation rules allow you to create a fully customized invitation process based on your company's business rules.	Advanced	/ 0
Cancel	Standard	/ 0
	Standard	/ 0
	Advanced	/ 0
		1-6 of 6 (< > >)
		•

Invitation Rules & Assig	Inment	
Name 个	Add a new invitation rule	× vpe
Every Locations	1 Invitation phases 2 Assignment Priority 3 Name	Advanc
Everyone	Invitation Priority	Standa
Last minute replacement	Sending phases Invitation Phases 1	Advanc
Score	+ Add a phase	Standar
Seniority	Cancel	xt Standar
Union A - Advanced Flow		Advanc

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

milde	< Back to settings			
unio:		Invitation & Assignm	•	
	General Settings	Invitation & Assignment Prior	Add a new invitation rule	
Abridge	Organizational Structure		Invitation phases Assignment Priority 3 Name	
П¢	Schedules and Availability	also define the priority according to which employee standard, or follow a custom workflow.	Invitation pridates 2 Assignment Priority 3 Name	
	Invitation & Assignment	Invitation Dulas & Assignment	Invite employees from	
	Invitation Management	invitation Rules & Assignmen	The exact team only	
6	Invitation & Assignment Priority		Employee must have position	
Q	Employee Mobility	Name 🛧	The exact position only	/pe
5	Payroll and Time Off	Even Locations	Employee must work at The exact location only	Advanced
ß	Time and Attendance			(Grances
E]	Billing	Everyone	Full-Time Part-Time Substitute Occasional On Contract	Standard
	Integrations		Temporary Replacement () On Probation () Prospect () Training ()	
ም?		Last minute replacement		Advanced
			Do not consider scheduling conflicts when sending invitations. A person who	
		Score	already has a shift or isn't available will still be invited.	Standard
			Ignore availability	
		Seniority	Do not consider availability when sending invitations. A person who isn't available will still be invited.	Standard
2			Delay before conding invitations for the following phase	
30.00		Union A - Advanced Flow	being before serving invitations for the following phase	Advanced
0				
0				
\$\$			+ Add a phase	
EN				
			Cancel Nex	

Click on Add a phase to add a phase.



Select Invitation Phases 2.

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in the set		Invitation & Assignm	•	
	General Settings	Invitation & Assignment Prior	Add a new invitation rule	×
Abridge	Organizational Structure		Invitation phases 2 Assignment Brighty 3 Name	
82	Schedules and Availability	also define the priority according to which employee standard, or follow a custom workflow.	inflution privates 22 Assignment + Hority to Hume	
	Invitation & Assignment	Invitation Pulse & Assignmen	Employee must have position	
	Invitation Management	Invitation Rules & Assignmen	The exact position only	
°)	Invitation & Assignment Priority		Employee must work at The exact location only	
0	Employee Mobility	Name 个		rpe
8	Payroll and Time Off	Every Locations	Full-Time (2) Part-Time (2) Substitute (2) Occasional (2) On Contract (2)	Advanced
da la	Time and Attendance	Licij Liciniono	Temporary Replacement (2) On Probation (2) Prospect (2) Training (2)	
- 	Billing	Everyone	Parental Leave 🔘 +5	Standard
	Integrations		Do not consider scheduling conflicts when sending invitations. A person who	
45		Last minute replacement	already has a shift or isn't available will still be invited.	Advanced
			Ignore availability	
		Score	Do not consider availability when sending invitations. A person who isn't available will still be invited.	Standard
		Seniority	Delay before sending invitations for the following phase	Standard
			Allocated delay (minutes) 30	
<i>\$</i>		Union A - Advanced Flow		Advanced
0				
0			> Invitation Phases 2	
鐐			+ Add a phase	
EN				×
~			Cancel Nex	t d

Select the desired Invitation criterias and click on Next.

o define the priority according to which employee ndard, or follow a custom workflow.		
vitation Rules & Assignmer	Invite employees from VIII Invite entropy of the second se	
ame A	Employee must have position Vince All Positions Vince All Position	
Every Locations	Employee must work at The exact location only Advanced	
Everyone	Invite employees with status Full-Time ② Part-Time ③ Substitute ③ Occasional ③ On Contract ③ Temporary Replacement ③ On Probation ③ Prospect ③ Training ③	
.ast minute replacement	Parental Leave (2) +5 Ignore schedule conflicts Advanced	
Score	Do not consider scheduling conflicts when sending invitations. A person who already has a shift or isn't available will still be invited.	
Seniority	Do not consider availability when sending invitations. A person who isn't available will still be invited.	
Jnion A - Advanced Flow	Delay before sending invitations for the following phase Allocated delay (minutes) 60	1-
	+ Add a phase	
	Cancel	

Select the Assignment Priority of your choice.

& Assignment			
Management	Invitation Rules & Assignmen	Add a new invitation rule	
& Assignment Priority		1 Invitation phases 2 Assignment Priority 3 Name	
Mobility	Name 🛧		/pe
Time Off	Every Locations	Assignment Priority	Advanced
ttendance	Every Educations	Assignment Priority	Havancea
	Everyone	1st level priority	Standard
s		1st level priority Seniority (descending order)	~
	Last minute replacement	2nd level priority	Advanced
	Score	2nd level priority All	Standard
	Seniority	> Group 1 Group 1	Standard
	Union A - Advanced Flow	+ Add a group	Advanced
		Back	Next

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

s and Availability	also define the priority according to which employees standard, or follow a custom workflow.	interested in a shift will be assigned to it. A rule can be	
& Assignment	Invitation Rules & Assignmen	Add a new invitation rule	
i Management			
Mobility	Name 1	1 Invitation phases 2 Assignment Priority 3 Name	/pe
id Time Off		Assignment Priority	
Attendance	Every Locations	Assignment Priority	Advanced
	Evervone	1st level priority	Standard
ns		1st level priority Seniority (descending order)	
	Last minute replacement	2nd level priority	Advanced
	Score	2nd level priority Score (ascending order)	Standard
	Seniority	All Score (descending order)	Standard
	Union A - Advanced Flow	Score (ascending order)	Advanced
		Seniority (ascending order)	
		Hours assigned (descending order)	
		Hours assigned (ascending order)	
		Experience (descending order) Experience (ascending order)	

16 Click on Next.

	/pe	
Assignment Priority		
Assignment Priority	Advanced	
1st level priority		
1st level priority Seniority (descending order)	Standard	
2nd level priority	Advanced	
2nd level priority Score (descending order)	Standard	
> Group 1 Group 1	Standard	
+ Add a group	Advanced	
	Back	

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

Every Locations	Add a new invitation rule	× Advanced
Everyone	1 Invitation phases 2 Assignment Priority 3 Name	Standard
Last minute replacement	Name	Advanced
	Rule Name	EN
Score		Standard
	Back	Save
Seniority		Standard
Union A - Advanced Flow		Advanced

Click on Save to apply the rule to your account.

		Туре
Add a new invitation rule	×	Advanced
1 Invitation phases 2 Assignment Priority 3 Name)	Standard
Name		Advanced
Rule Name Rule 1	EN	Standard
	Back Save	
		Standard
		Advanced
		1-6 0