

# HUMAN RESOURCES

## EMPLOYEES – OVERTIME AND HOLIDAYS

The Overtime and Holidays tile in the Employees listing screen will direct you to the **Availability Exceptions** listing screen.

**Availability Exceptions** are any changes to an employee's standard availability: time that the employee is unavailable when usually available or time when the employee is available when usually unavailable.

In BPO, employee **availability exceptions** can be used to specify:

- i. the number of unavailable labour hours for each day that an employee will not be present or available during their usual working hours.
  - An **Unavailable** exception may be used to reflect an employee taking annual or compassionate leave.
- ii. the number of labour hours for each day that the employee will be available and present outside of their usual working hours.
  - An **Available** exception may be used to reflect an employee being able to work on a public holiday.

These exceptions can be recorded from the **Employees** listing screen.

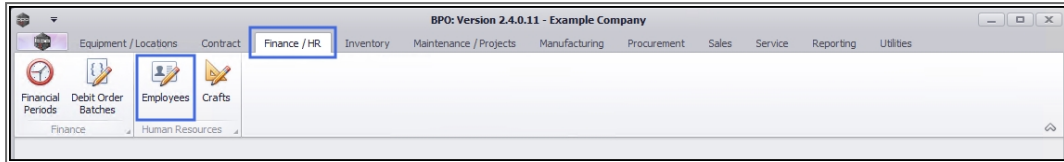
Availability Exceptions for employees who are also Technicians can also be recorded in the BPO **Service** module - click on the link for further information.

If an employee is also a Technician, any edits made to the availability exceptions from either the **HR** module or the **Service** module will reflect in the other module screens.

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**Ribbon Access:** *Finance and HR > Employees*

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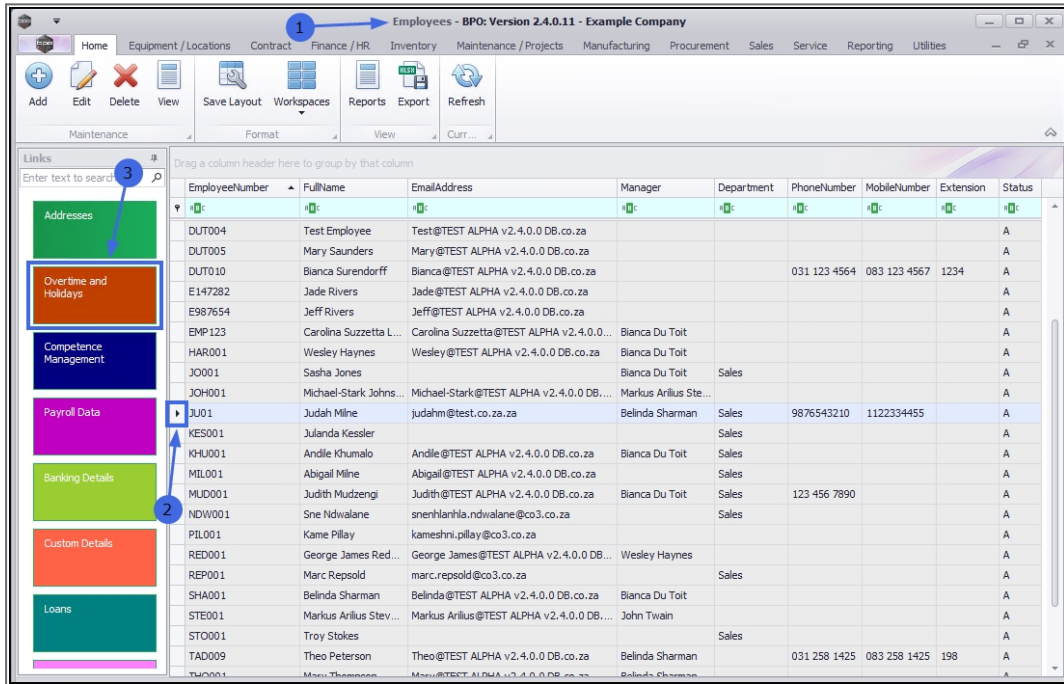


1. The Employees listing screen will display.

## VIEW EMPLOYEE AVAILABILITY EXCEPTIONS

### SELECT EMPLOYEE

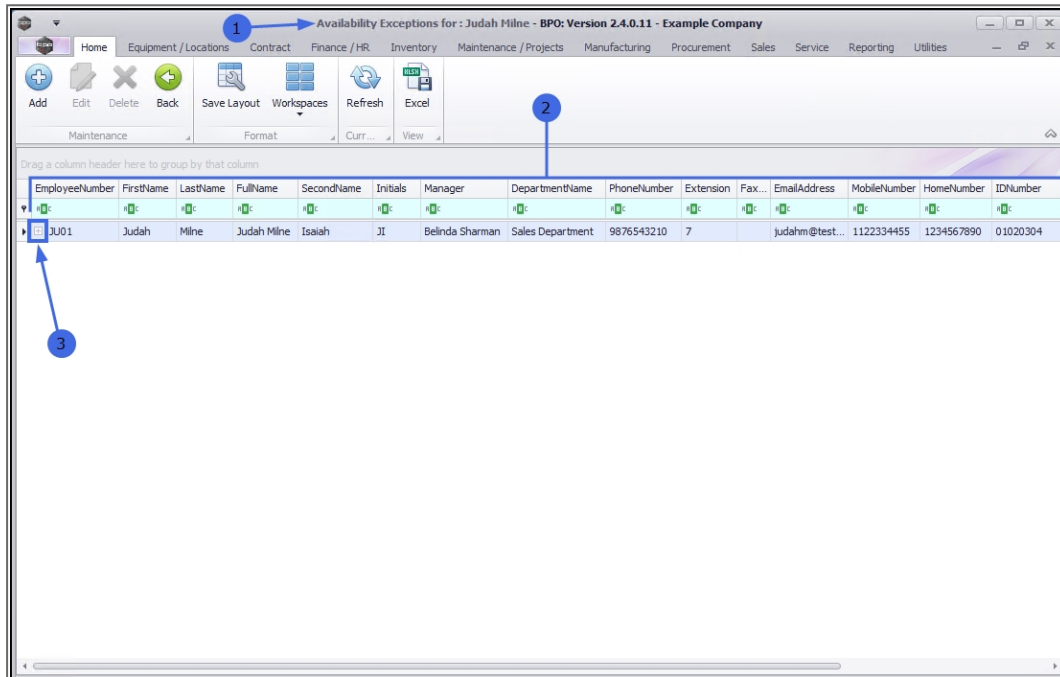
2. Select the **row** of the employee whose availability exceptions schedule you wish to **view**.
3. Click on the **Overtime and Holidays** tile.



1. The **Availability Exception for : [ ]** screen will open.
2. Here you can **view** the selected employee's details in the data grid.

3. To view the employee's availability exceptions you will need to open the data sub grid. To do this, click on the **expand** button in the row of the employee.

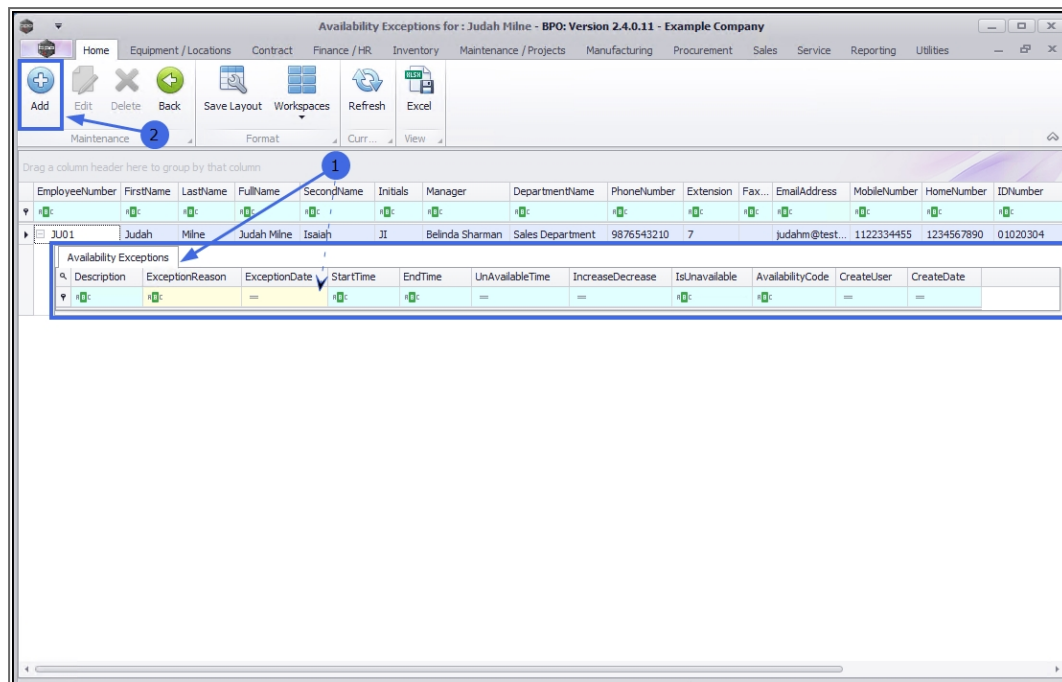
- **Note:** In this example, the employee has no exceptions currently linked. The **expand** button in the row of the employee is **faint** which indicates that there is no content in the sub grid. Should there be content, this expand button would be **bold**.



1. The **Availability Exceptions** sub grid will open. This sub grid will list all of the exceptions currently linked to the employee. You can see in this example that there is no content in this sub grid.

## ADD EMPLOYEE AVAILABILITY EXCEPTION

2. Click on **Add**.



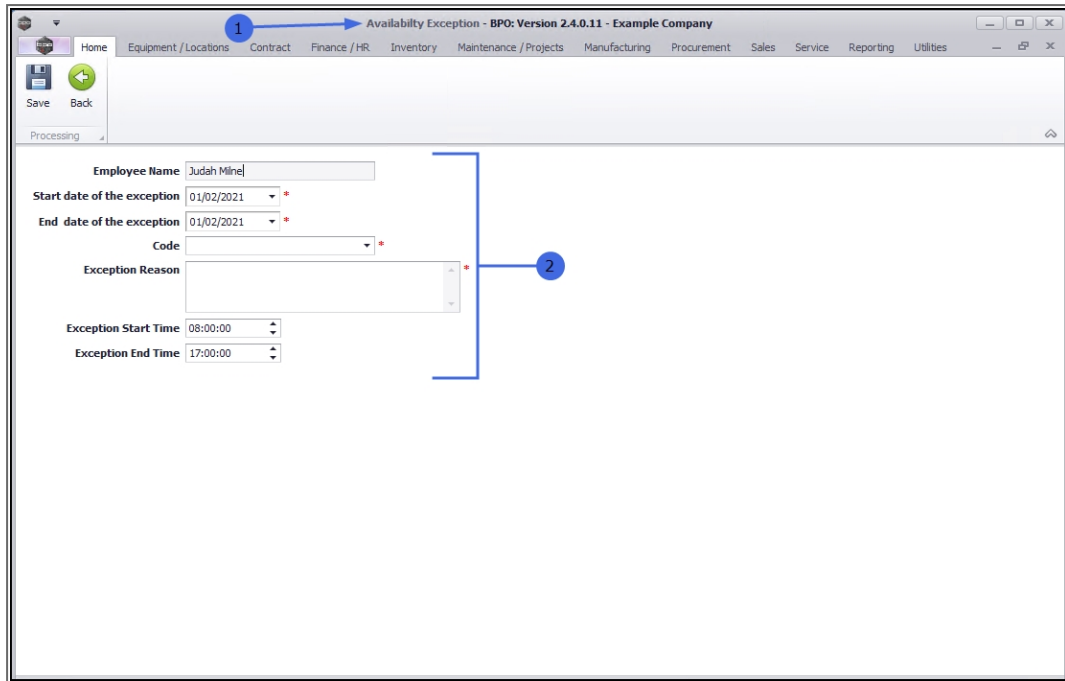
1. The **Availability Exception** screen will open.

## ADD EXCEPTION DETAILS

2. Select from the drop-down menus or type directly into the fields, the availability exception details:
  - **Employee Name:** This will be populated with the name of the employee initially selected.
  - **Start Date of the exception:** This will auto populate with the current date.
    - Either type in or click on the drop-down arrow and use the calendar function to select an alternative start date, if required.
  - **End Date of the exception:** This will auto populate with the current date.
    - Either type in or click on the drop-down arrow and use the calendar function to

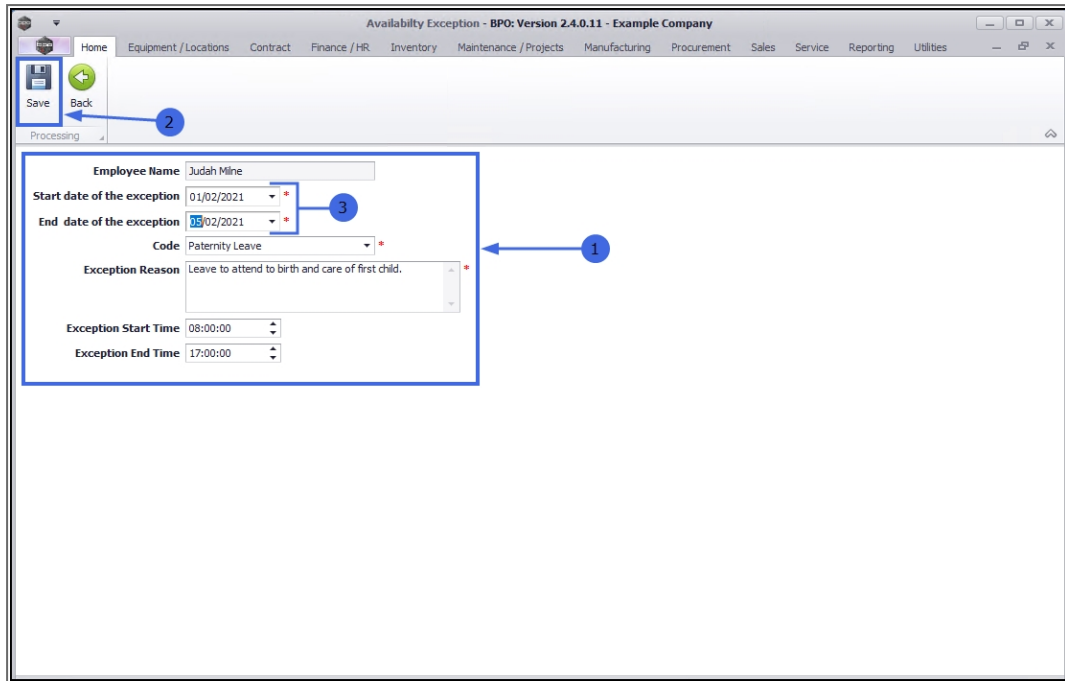
select an alternative end date, if required.

- **Code:** Click on the drop-down arrow and select from the list the appropriate exception reason code e.g. 'On Leave'.
- **Exception Reason:** Type in this text box, the detail as to why this exception is occurring.
- **Exception Start Time:** This will auto populate with the 'normal' working day start time (08:00:00).
  - Either type in or click on the drop-down arrow and use the calendar function to select an alternative exception start time, if required.
- **Exception End Time:** This will auto populate with the normal working day end time (17:00:00).
  - Either type in or click on the drop-down arrow and use the calendar function to select an alternative exception end time, if required.



## SAVE EXCEPTION DETAILS

1. When all the Availability Exception **dates**, **times** and **reasons** have been added,
2. Click on **Save**.
3. Note that in this example, the availability exception period (**Start** and **End Date**) is for **5** consecutive 'normal' labour days.



Availability Exception - BPO: Version 2.4.0.11 - Example Company

Home Equipment / Locations Contract Finance / HR Inventory Maintenance / Projects Manufacturing Procurement Sales Service Reporting Utilities

Save Back

Processing

Employee Name: Judah Milne

Start date of the exception: 01/02/2021

End date of the exception: 05/02/2021

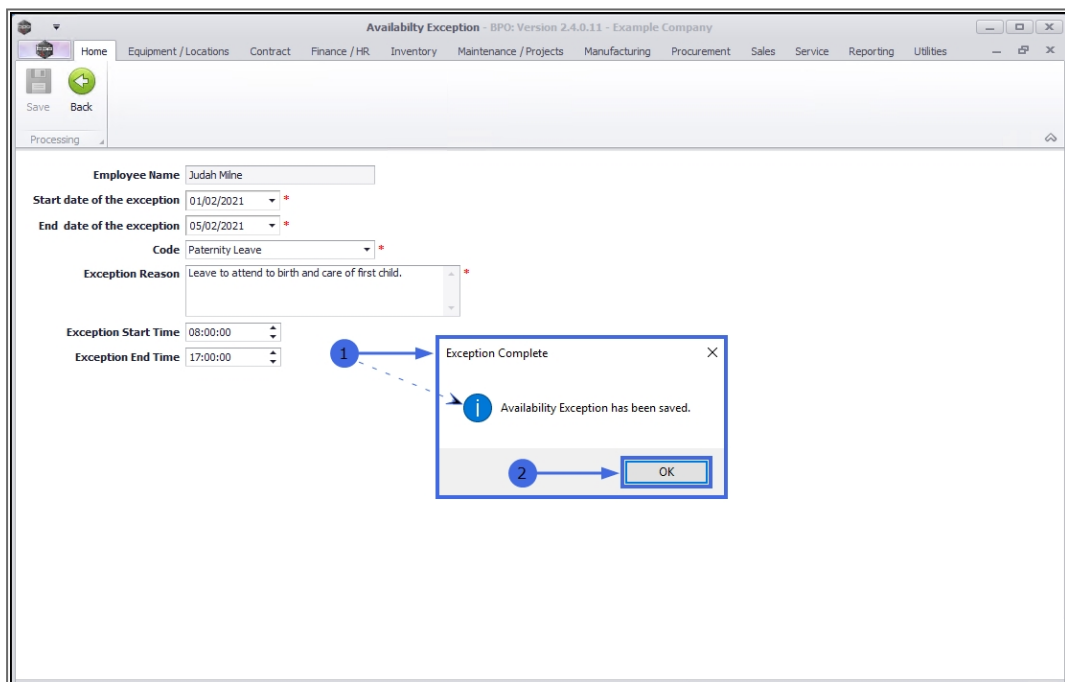
Code: Paternity Leave

Exception Reason: Leave to attend to birth and care of first child.

Exception Start Time: 08:00:00

Exception End Time: 17:00:00

1. An **Exception Complete** message box will pop up informing you that;
  - **Availability Exception has been saved.**
2. Click on **OK**.



Availability Exception - BPO: Version 2.4.0.11 - Example Company

Home Equipment / Locations Contract Finance / HR Inventory Maintenance / Projects Manufacturing Procurement Sales Service Reporting Utilities

Save Back

Processing

Employee Name: Judah Milne

Start date of the exception: 01/02/2021

End date of the exception: 05/02/2021

Code: Paternity Leave

Exception Reason: Leave to attend to birth and care of first child.

Exception Start Time: 08:00:00

Exception End Time: 17:00:00

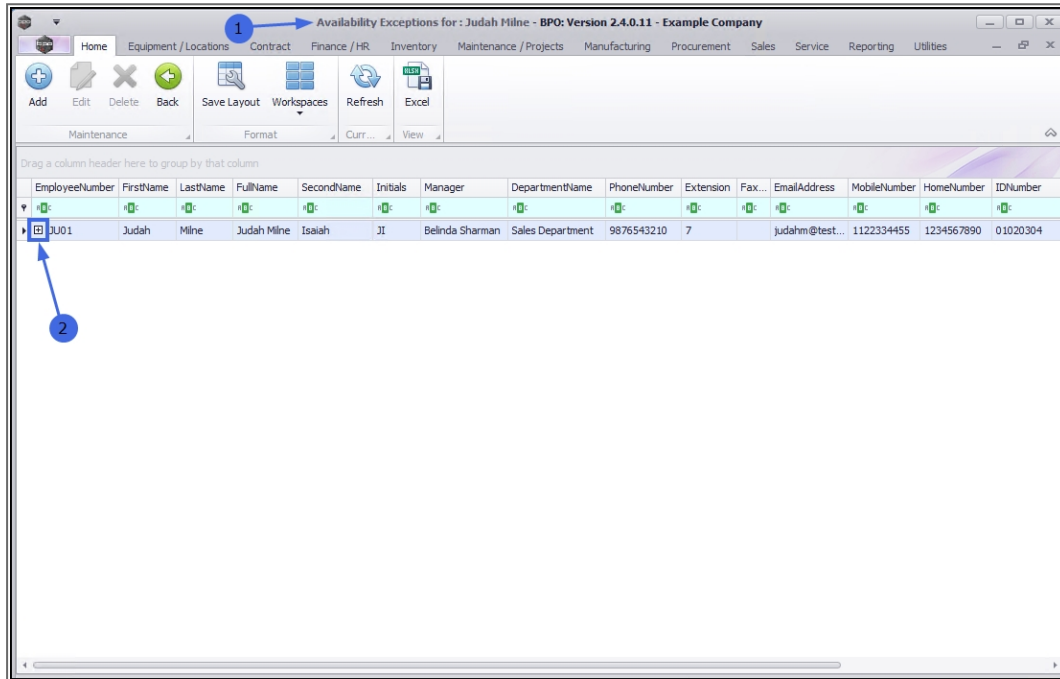
Exception Complete

Availability Exception has been saved.

OK

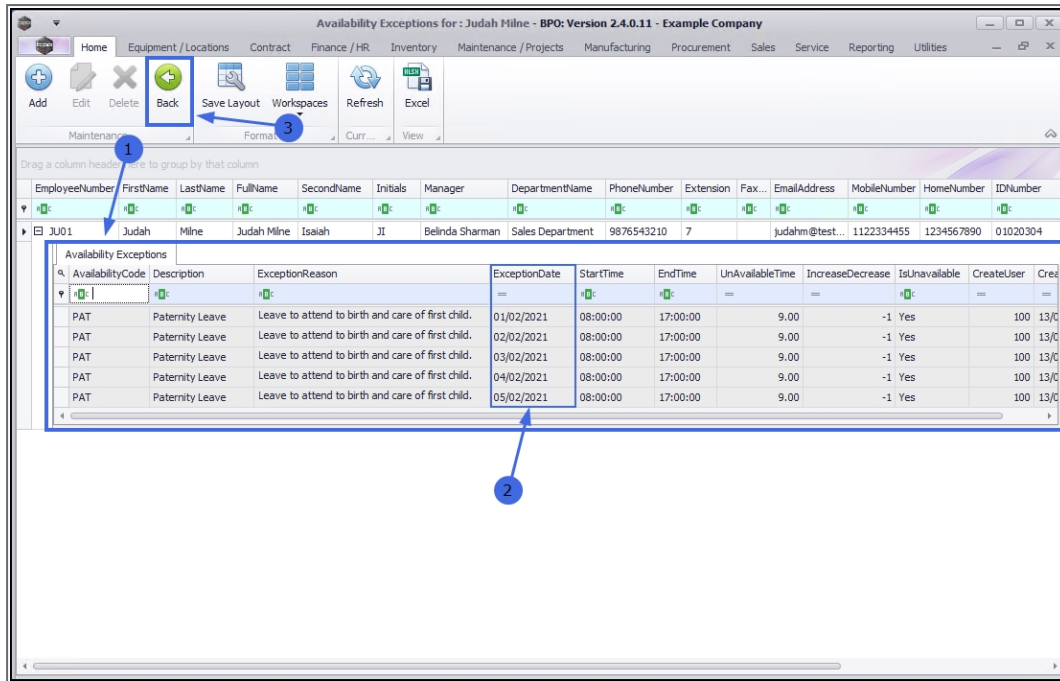
## VIEW NEW EXCEPTION

1. You will return to the **Availability Exceptions for employees** screen.
  - Note that there is now a **bold** expand button in the row of the employee. This indicates that there is now data in the sub grid.
2. Click on this **expand** button.



1. The Availability Exceptions sub grid will open. All the details added to the previous screen can be viewed here.
2. You will note that **each day** of the exception period is recorded on a separate line.
3. Click on **Back** to return to the Employees listing screen.

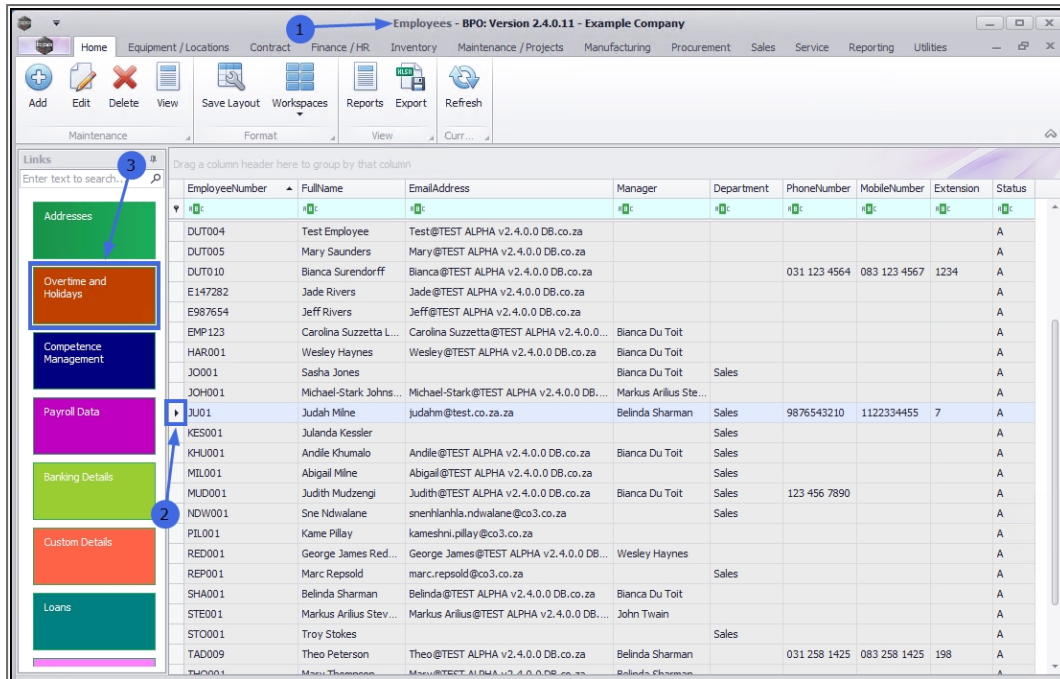




## EDIT EMPLOYEE AVAILABILITY EXCEPTION

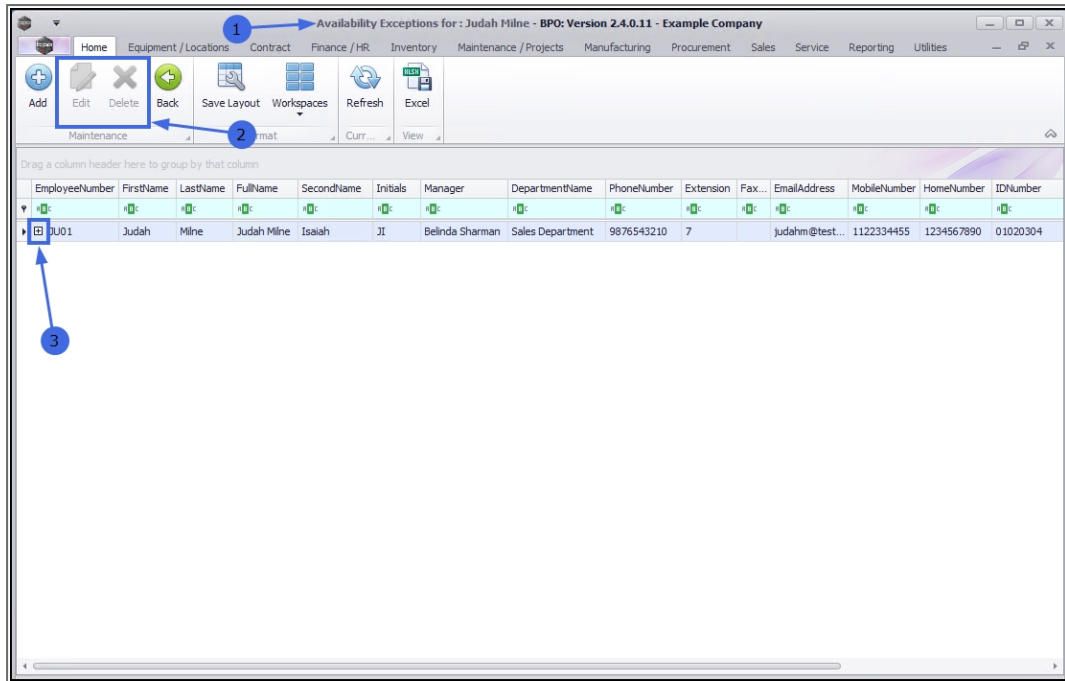
### SELECT EMPLOYEE

1. In the *Employees* listing screen,
2. Select the **row** of the employee whose availability exception you wish to **change**.
3. Click on the *Overtime and Holidays* tile.



EmployeeNumber	FullName	EmailAddress	Manager	Department	PhoneNumber	MobileNumber	Extension	Status
DUT004	Test Employee	Test@TEST ALPHA v2.4.0.0 DB.co.za						A
DUT005	Mary Saunders	Mary@TEST ALPHA v2.4.0.0 DB.co.za						A
DUT010	Bianca Surendorff	Bianca@TEST ALPHA v2.4.0.0 DB.co.za			031 123 4564	083 123 4567	1234	A
E147282	Jade Rivers	Jade@TEST ALPHA v2.4.0.0 DB.co.za						A
E987654	Jeff Rivers	Jeff@TEST ALPHA v2.4.0.0 DB.co.za						A
EMP 123	Carolina Suzzetta L...	Carolina Suzzetta@TEST ALPHA v2.4.0.0...	Bianca Du Toit					A
HAR001	Wesley Haynes	Wesley@TEST ALPHA v2.4.0.0 DB.co.za	Bianca Du Toit					A
JO001	Sasha Jones		Bianca Du Toit	Sales				A
JOH001	Michael-Stark Johns...	Michael-Stark@TEST ALPHA v2.4.0.0 DB...	Markus Arilius Ste...					A
JU01	Judah Milne	judahm@test.co.za.za	Belinda Sharman	Sales	9876543210	1122334455	7	A
KES001	Julanda Kessler		Sales					A
KHU001	Andile Khumalo	Andile@TEST ALPHA v2.4.0.0 DB.co.za	Bianca Du Toit	Sales				A
MIL001	Abigail Milne	Abigail@TEST ALPHA v2.4.0.0 DB.co.za	Sales					A
MUD001	Judith Mudzengi	Judith@TEST ALPHA v2.4.0.0 DB.co.za	Bianca Du Toit	Sales	123 456 7890			A
NDW001	Sne Ndwalane	snehlhlanhla.ndwalane@co3.co.za	Sales					A
PL001	Kame Pillay	kameshni.pillay@co3.co.za						A
RED001	George James Red...	George James@TEST ALPHA v2.4.0.0 DB...	Wesley Haynes					A
REP001	Marc Repsold	marc.repsold@co3.co.za		Sales				A
SHA001	Belinda Sharman	Belinda@TEST ALPHA v2.4.0.0 DB.co.za	Bianca Du Toit					A
STE001	Markus Arilius Stev...	Markus Arilius@TEST ALPHA v2.4.0.0 DB...	John Twain					A
STO001	Troy Stokes		Sales					A
TAD009	Theo Peterson	Theo@TEST ALPHA v2.4.0.0 DB.co.za	Belinda Sharman		031 258 1425	083 258 1425	198	A
TUC001	Markus Arilius Stev...	Markus Arilius@TEST ALPHA v2.4.0.0 DB...	Belinda Sharman					A

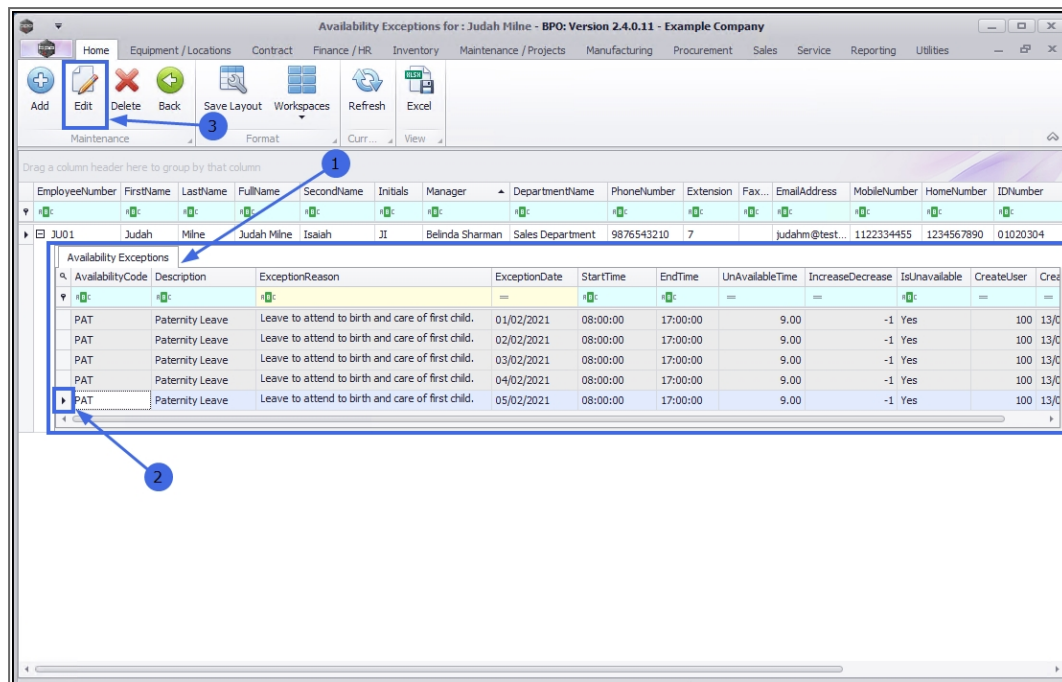
1. The **Availability Exceptions for: [ ]** screen will open.
2. **Important Note:** Upon opening, the **Edit** and **Delete** buttons are inactive (greyed out) in this screen. The Availability Exceptions **sub grid** must be opened first and then the **Edit** and **Delete** buttons will be activated (bold).
3. Click on the **expand** button in the row of the employee.



1. The **Availability Exceptions** sub grid will open.

## SELECT EXCEPTION TO EDIT

2. Select the **row** of the particular exception that you wish to change.
3. Click on **Edit**.



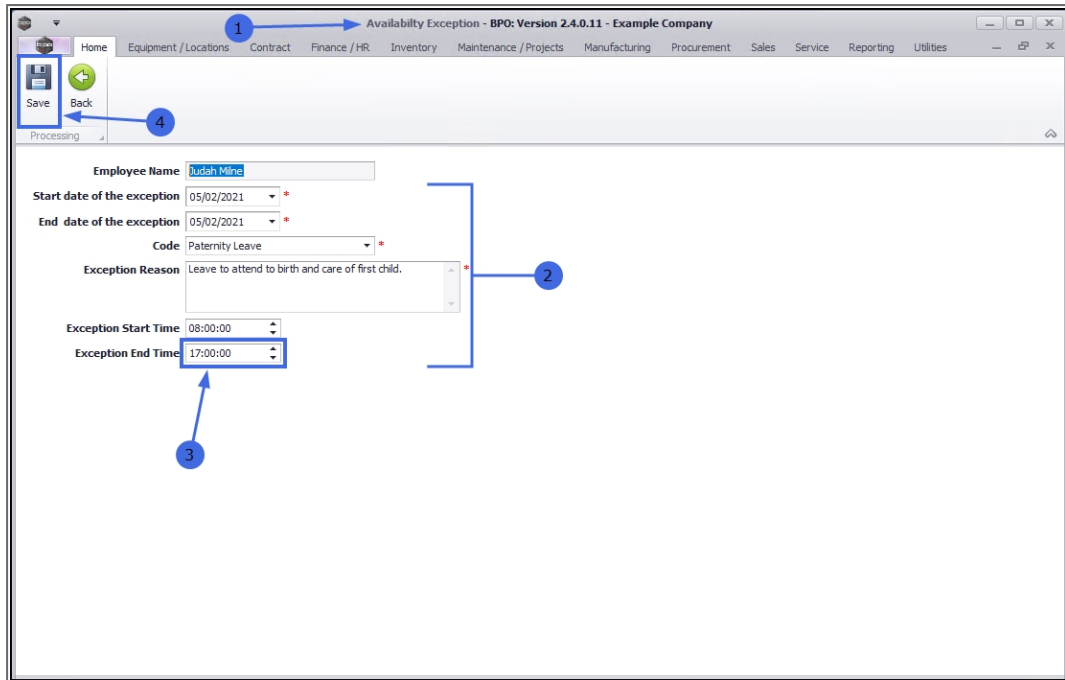
1. The **Availability Exception** screen will open.

## EDIT EXCEPTION DETAILS

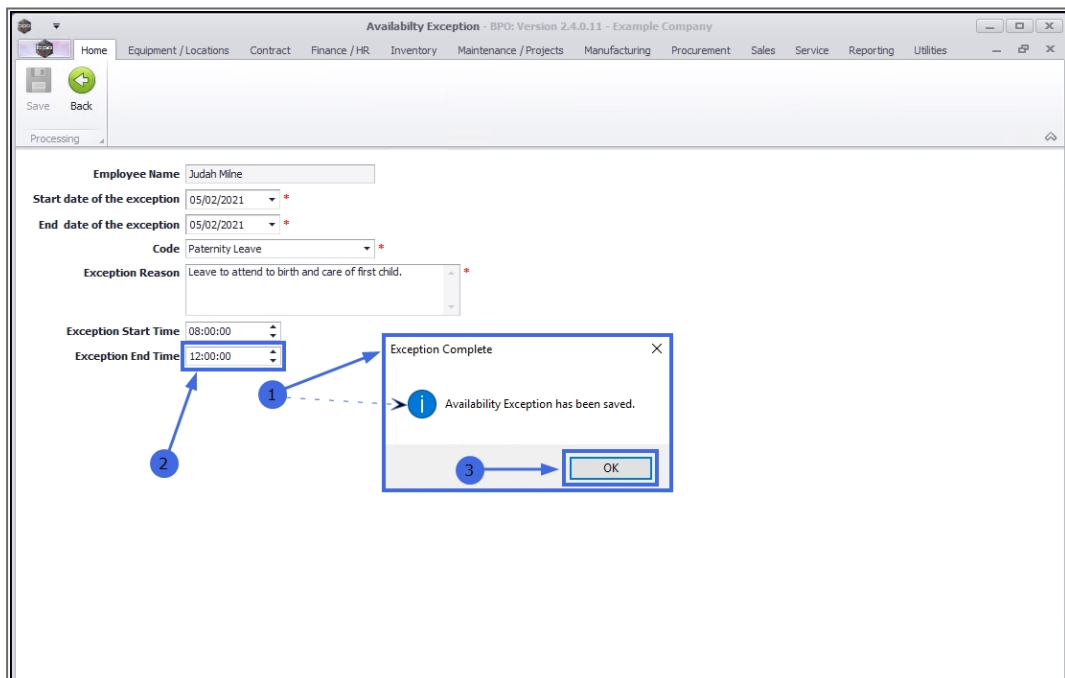
2. You can edit any of the details in this screen apart from the **Employee Name**.
3. In this example, the **Exception End Time** is to be changed to **12:00.00** (half day).

## SAVE EDITED DETAILS

4. When you have finished making the required changes, click on **Save**.

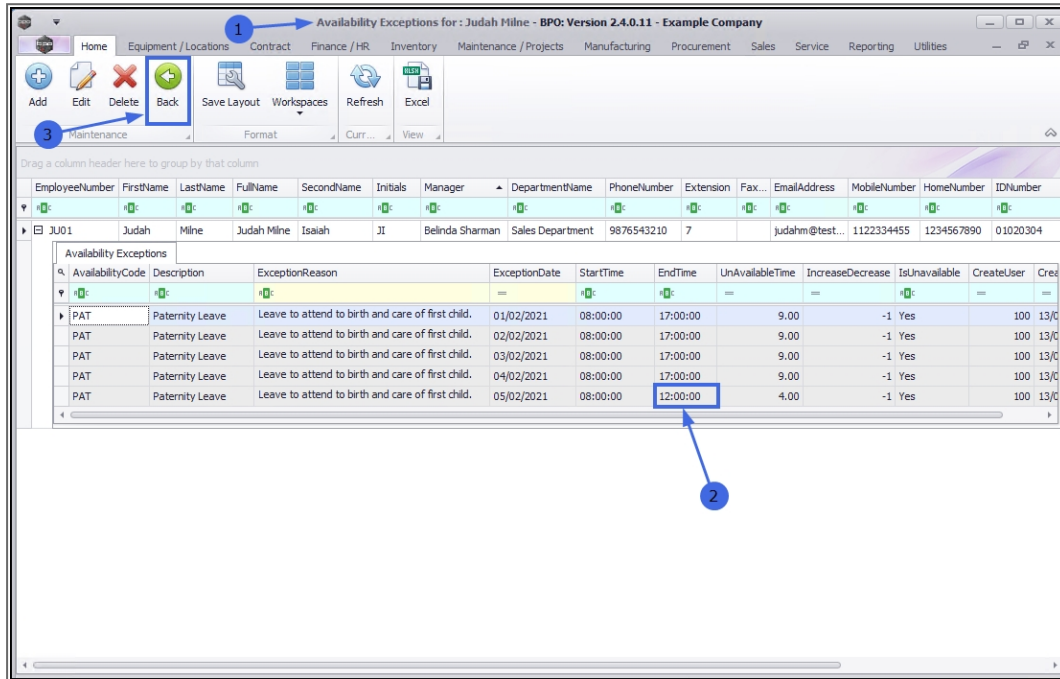


1. An **Exception Complete** message box will pop up informing you;
  - Availability Exception has been saved.
2. Note that the **Exception End Time** is now **12:00:00**.
3. Click on **OK**.



## VIEW EDITED EXCEPTION

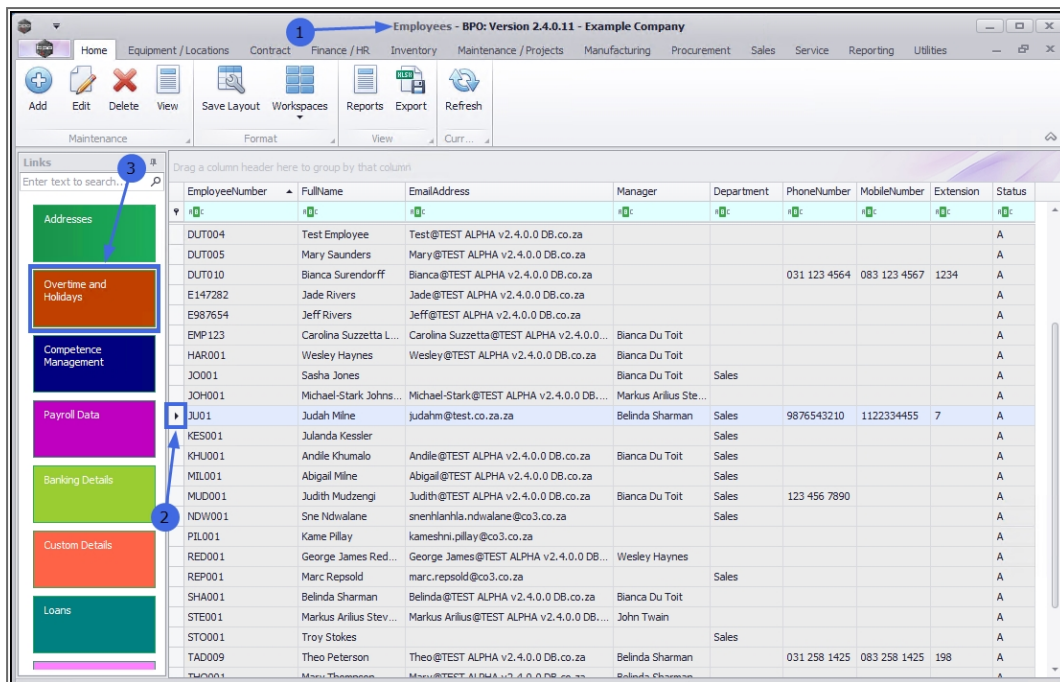
1. You will return to the **Availability Exceptions for: [ ]** screen.
2. The changes can be viewed in the subgrid.
3. Click on **Back** to return to the **Employees** listing screen.



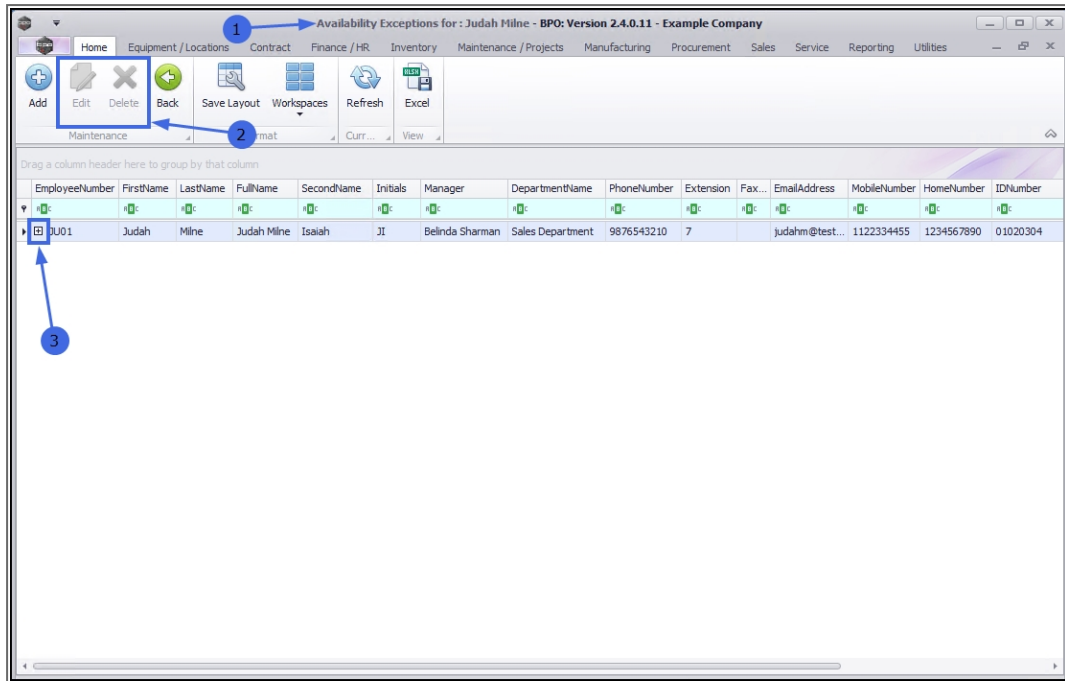
## DELETE EMPLOYEE AVAILABILITY EXCEPTION

### SELECT EMPLOYEE

1. In the **Employees** listing screen,
2. Select the **row** of the employee whose availability exception you wish to **delete**.
3. Click on the **Overtime and Holidays** tile.



1. The **Availability Exceptions for: [ ]** screen will open.
2. **Important Note:** Upon opening, the **Edit** and **Delete** buttons are inactive (greyed out) in this screen. The Availability Exceptions **subgrid** must be opened first and then the **Edit** and **Delete** buttons will be activated (bold).
3. Click on the **expand** button in the row of the employee.



1. The **Availability Exceptions** subgrid will open.

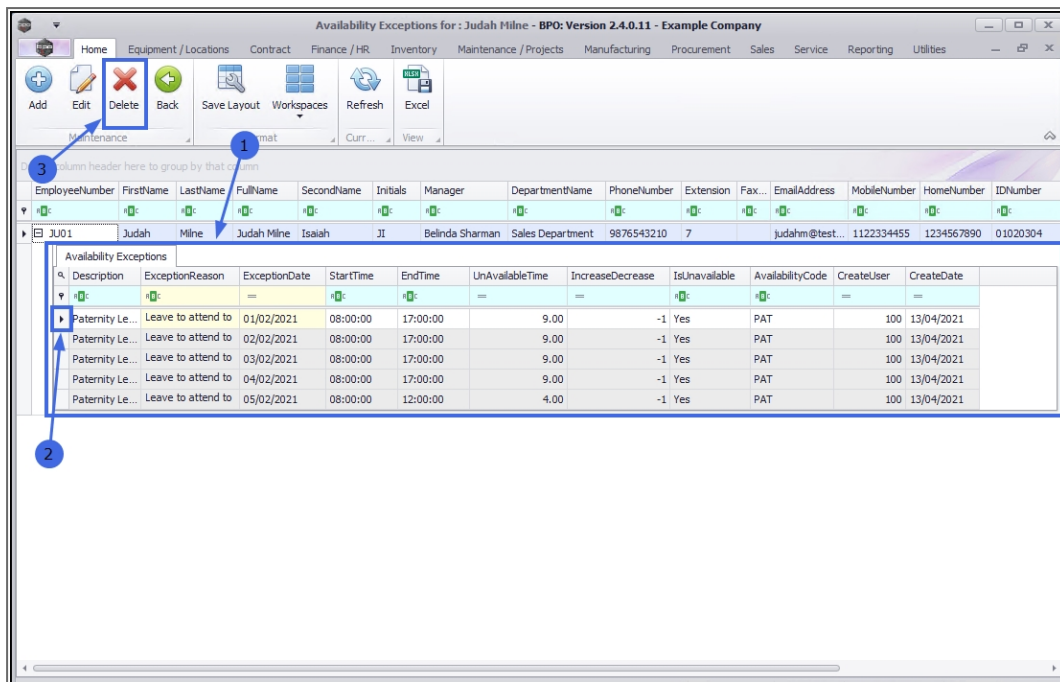
## SELECT EXCEPTION TO DELETE

2. Select the **row** of the particular exception that you wish to remove.

## DELETE EXCEPTION

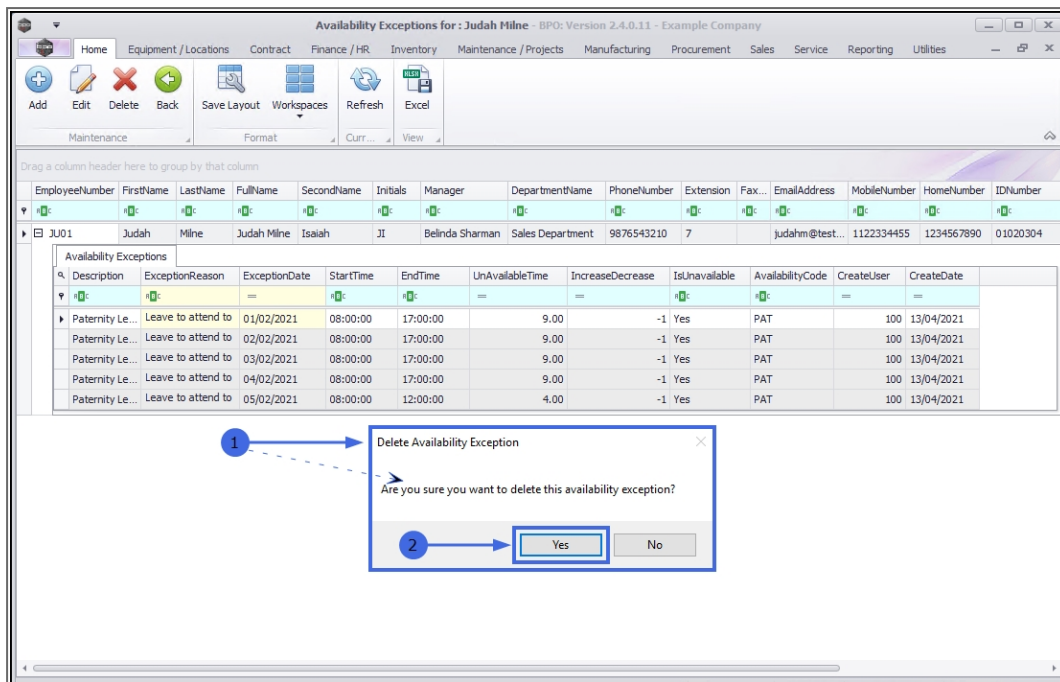
3. Click on **Delete**.



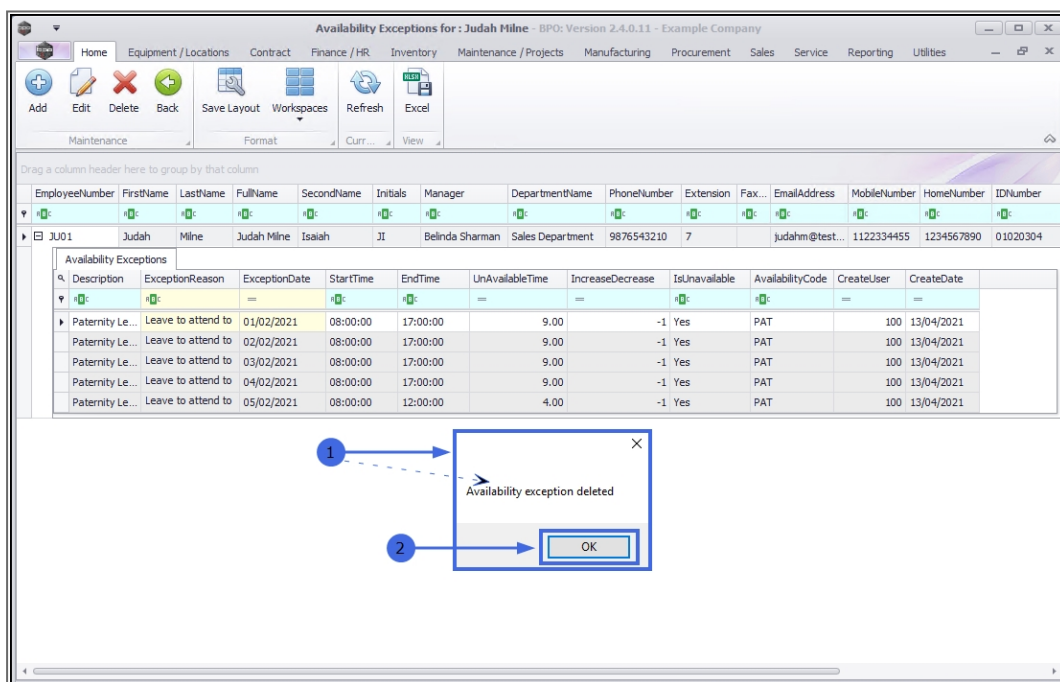


## SAVE EXCEPTION REMOVAL

1. A **Delete Availability Exception** message box will pop up asking;
  - *Are you sure you want to delete this availability exception?*
2. Click on **Yes**.

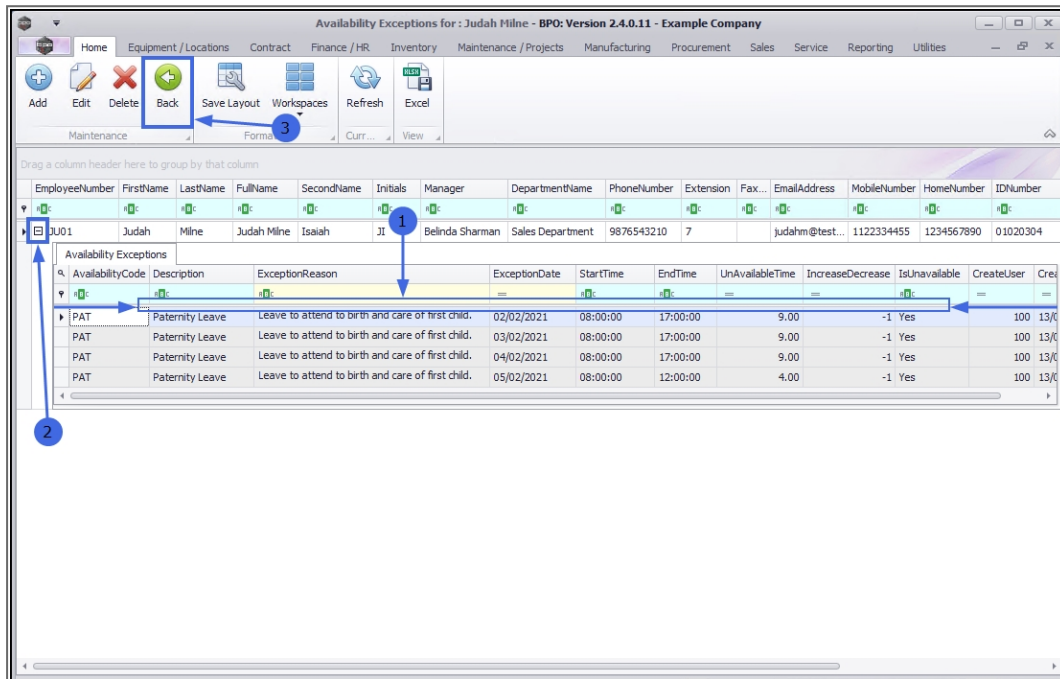


1. A second message box will pop up informing you;
  - **Availability exception deleted.**
2. Click on **OK**.



## VIEW DELETION RESULTS

1. The deleted exception will now be **removed** from the Availability Exceptions frame.
2. **Collapse** the frame when you are done.
3. Click on **Back** to return to the Employees listing screen



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