

# SCHEDULING

## SITE EXCEPTIONS

(up to v2.4 )

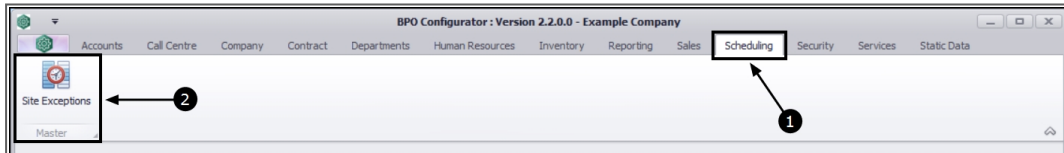
The Site Exceptions module is used to determine if there are any changes to the Company's Standard Availability which may deem them 'unavailable'. A Site exception may be used to reflect Public Holidays or Company Training / Team Building / Community Services or any event where the company is closed / not operating.

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**Ribbon Access:** *Configurator > Scheduling > Site Exceptions*

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1. In the Configurator, select the Scheduling ribbon tab.
2. Click on Site Exceptions.

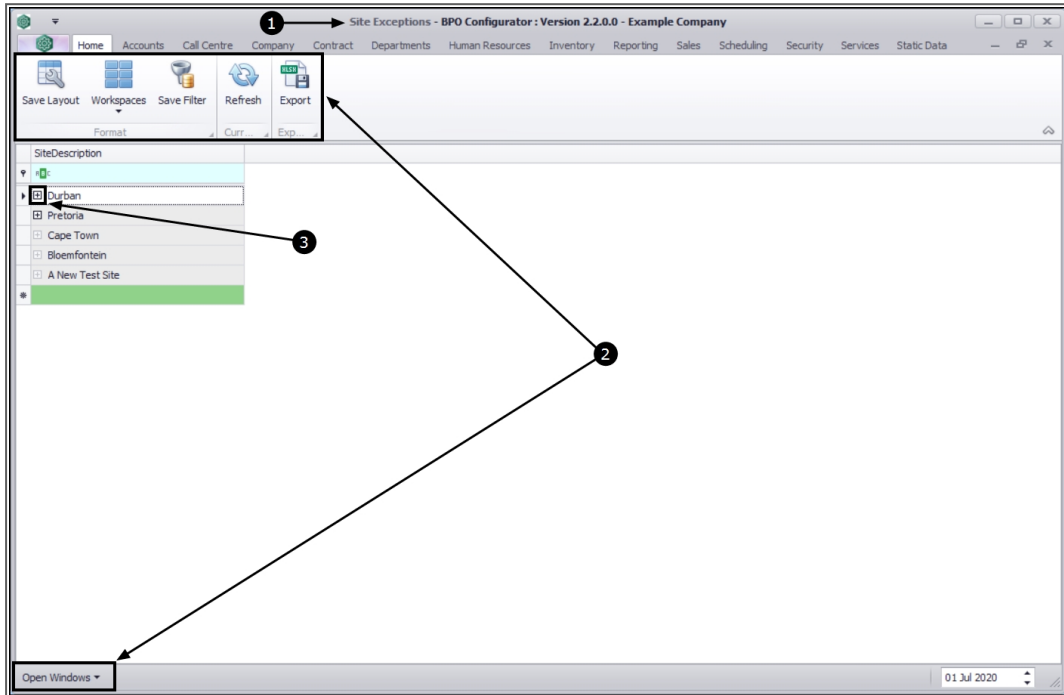


## SELECT SITE

1. The **Site Exception** listing screen will open.
2. Note the general BPO2 interface functionalities in this screen:
  - [Save Layout](#)
  - [Workspaces](#)
  - [Save Filter](#)
  - **Refresh:** Clicking on this button will update the currently displayed page.

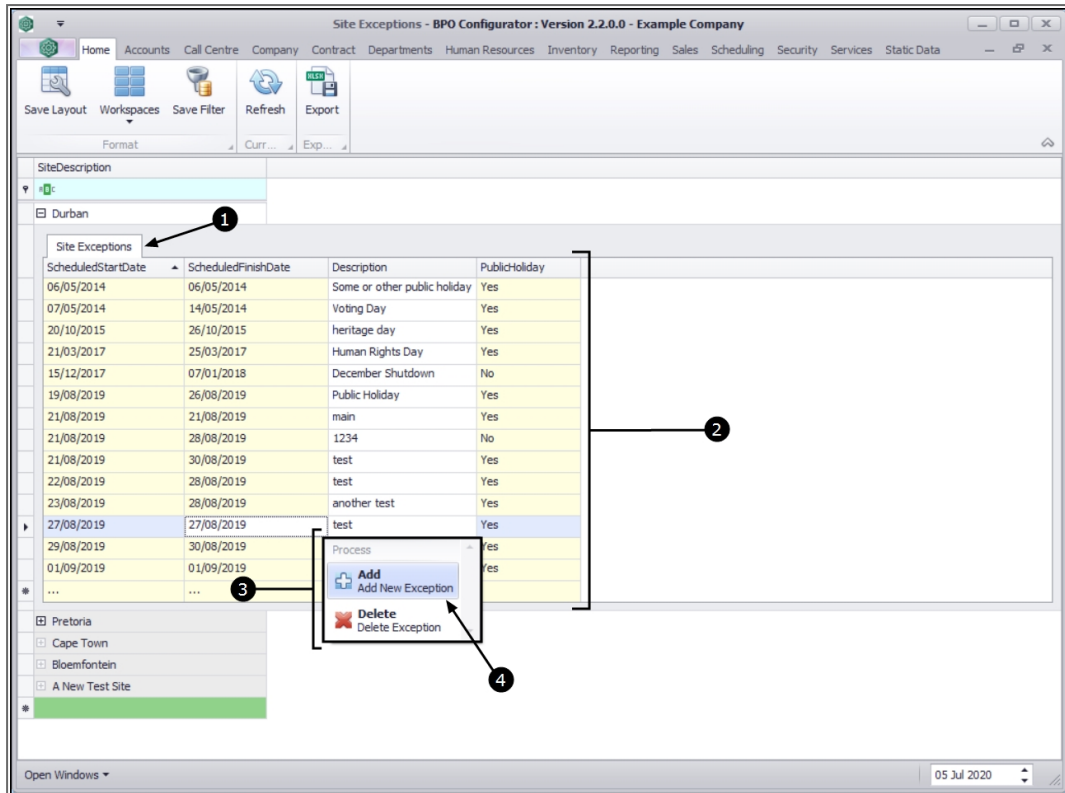
- [Export](#)
- [Open Windows](#)

3. In the **Site Descriptions** data grid, select the site where you wish to view / add or edit the exception. In this example, Durban has been selected.



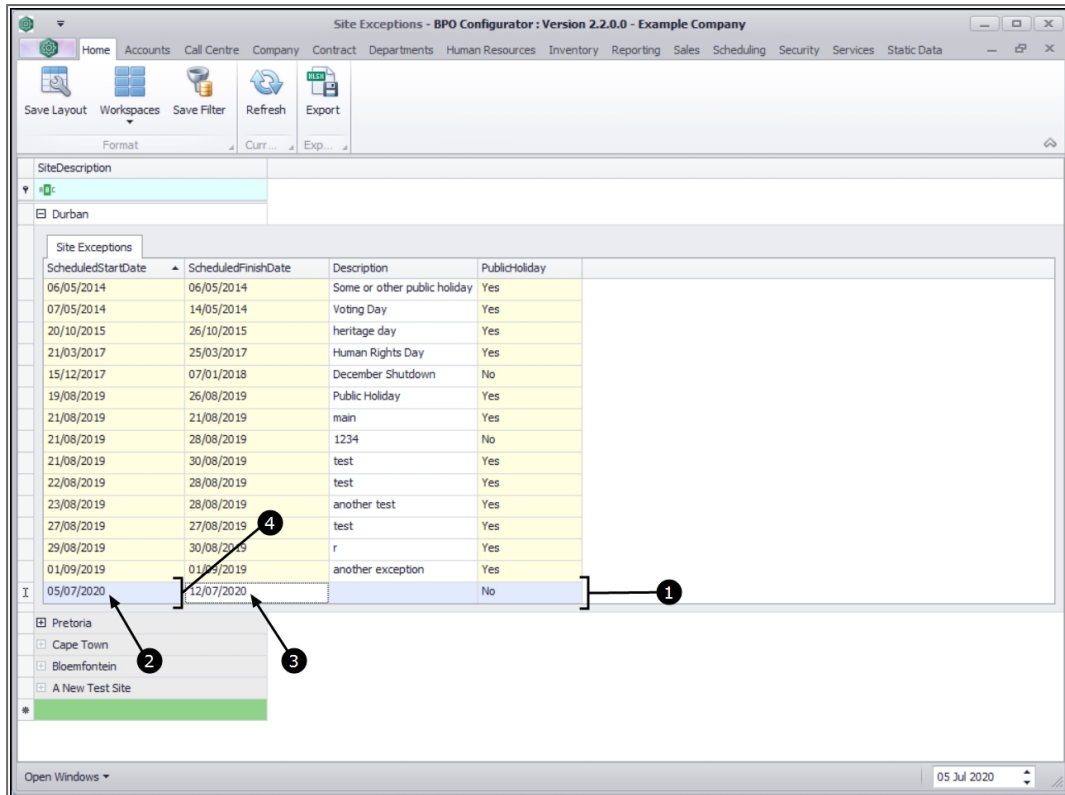
## ADD NEW EXCEPTION

1. The 'Durban' **Site Exceptions** data grid will expand.
2. Here you can view a list of all the dates that have been set aside as **unavailable** for the company, with a description and whether each exception is a public holiday, or not.
3. Right click anywhere in the data grid to display the **Process** menu.
4. Click on **Add** - Add New Exception.

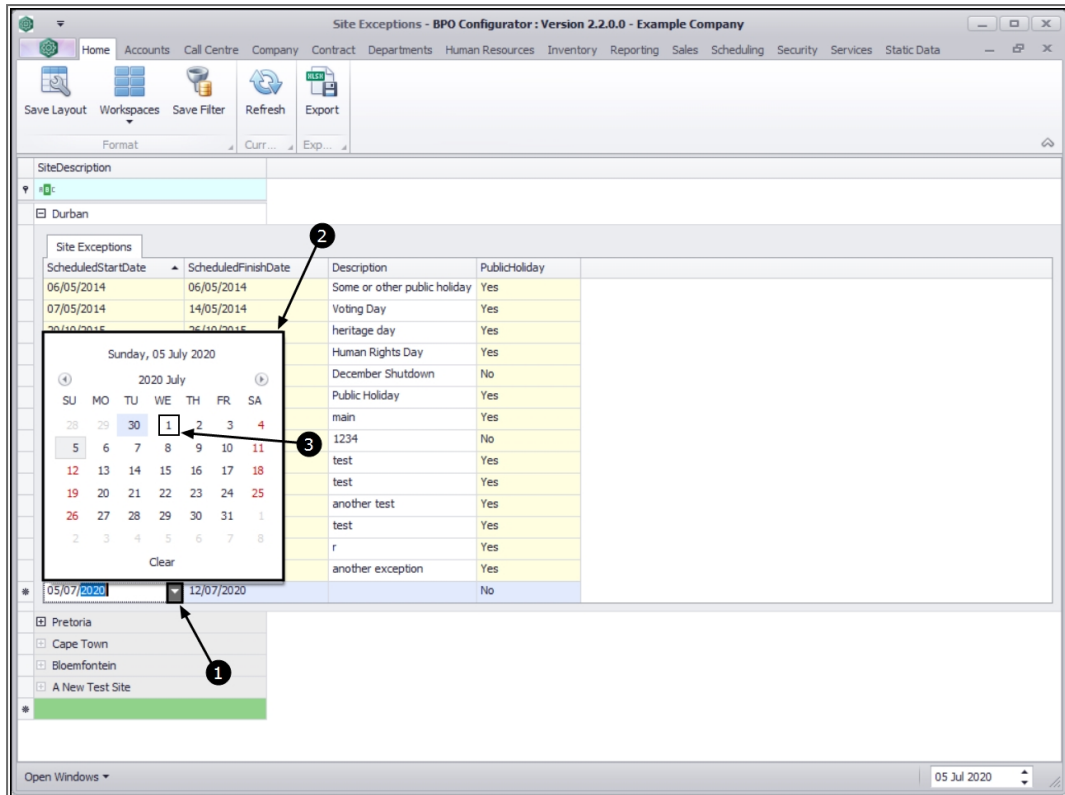


## SELECT NEW EXCEPTION DATE

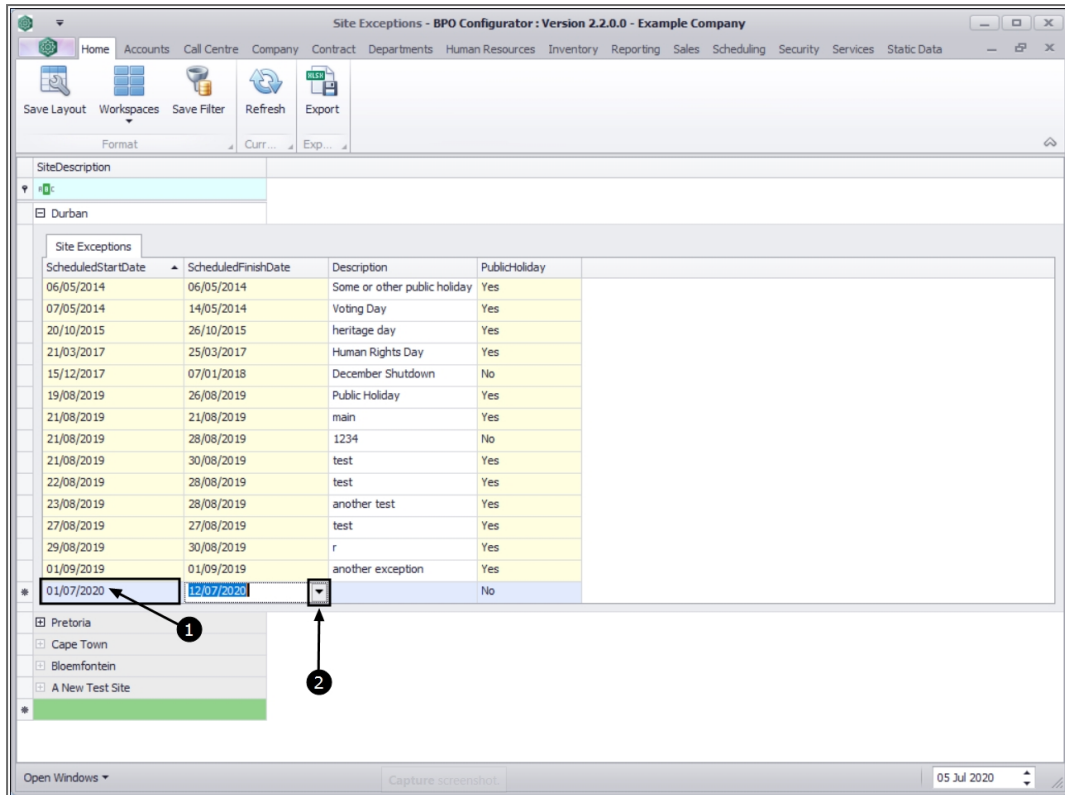
1. A new row will appear at the bottom of the data grid.
2. The **Scheduled Start Date** will auto populate with the **current date**.
3. The **Scheduled Finish Date** will auto populate with the date a week **after** the Start date.
4. To change the Start Date , click in the Scheduled Start Date field.



1. A drop-down arrow will appear, click on this arrow.
2. The **Calendar** function will pop up.
3. Select the required alternative date in the calendar.

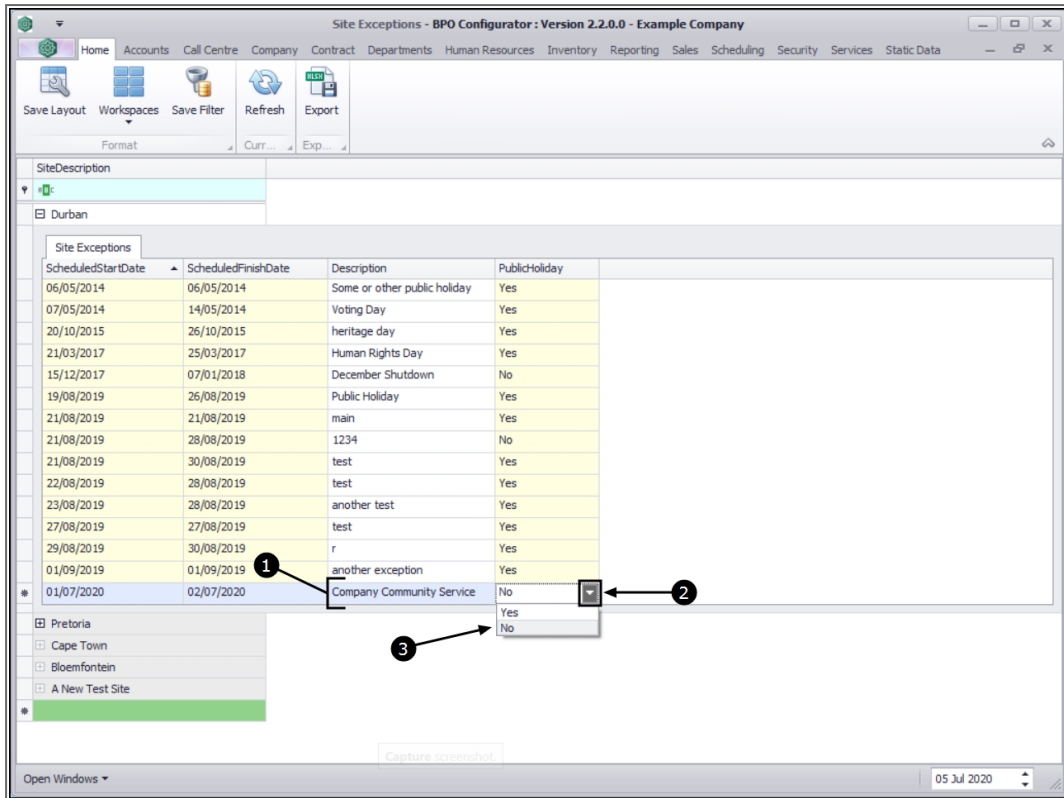


1. The selected new start date will populate the field.
2. Follow the same process to change the **Scheduled Finish** date, if required.



## DESCRIPTION

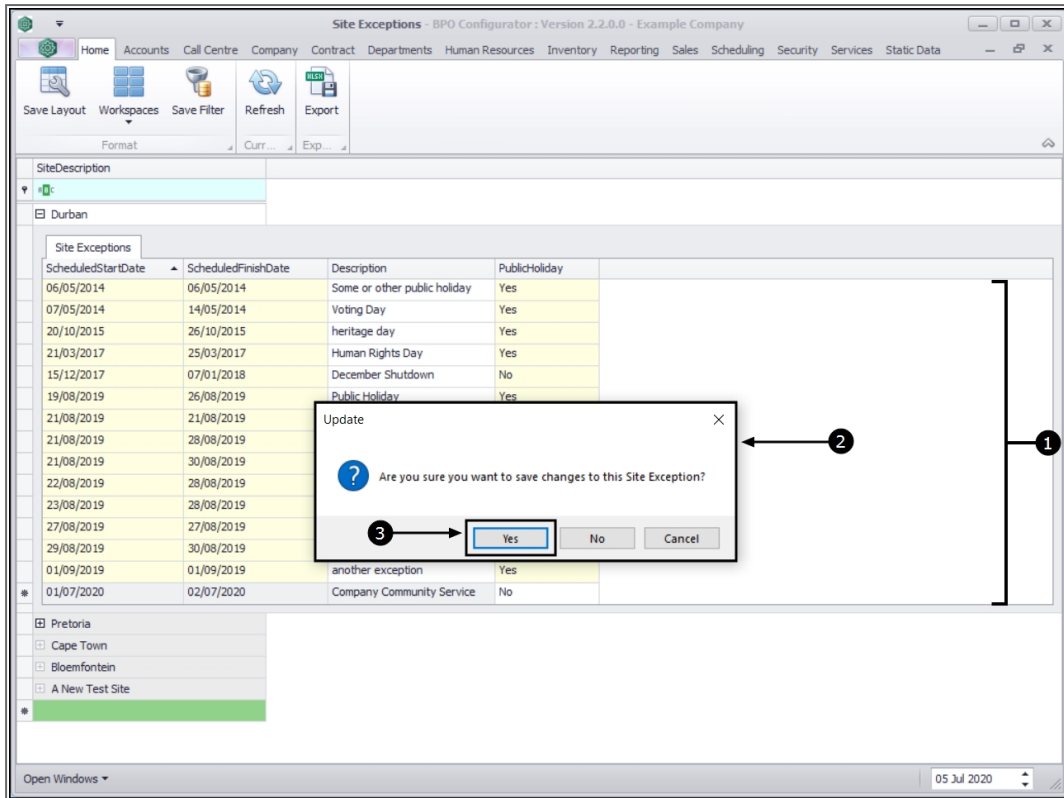
1. When you have specified the correct Start and Finish dates, type in a **Description** of the new Site Exception.
2. Move across to the **Public Holiday** column and click in the field to display a drop-down arrow.
3. Select from the menu whether this Site Exception is a public holiday, or not. In this example **No** is selected.



## SAVE NEW SITE EXCEPTION

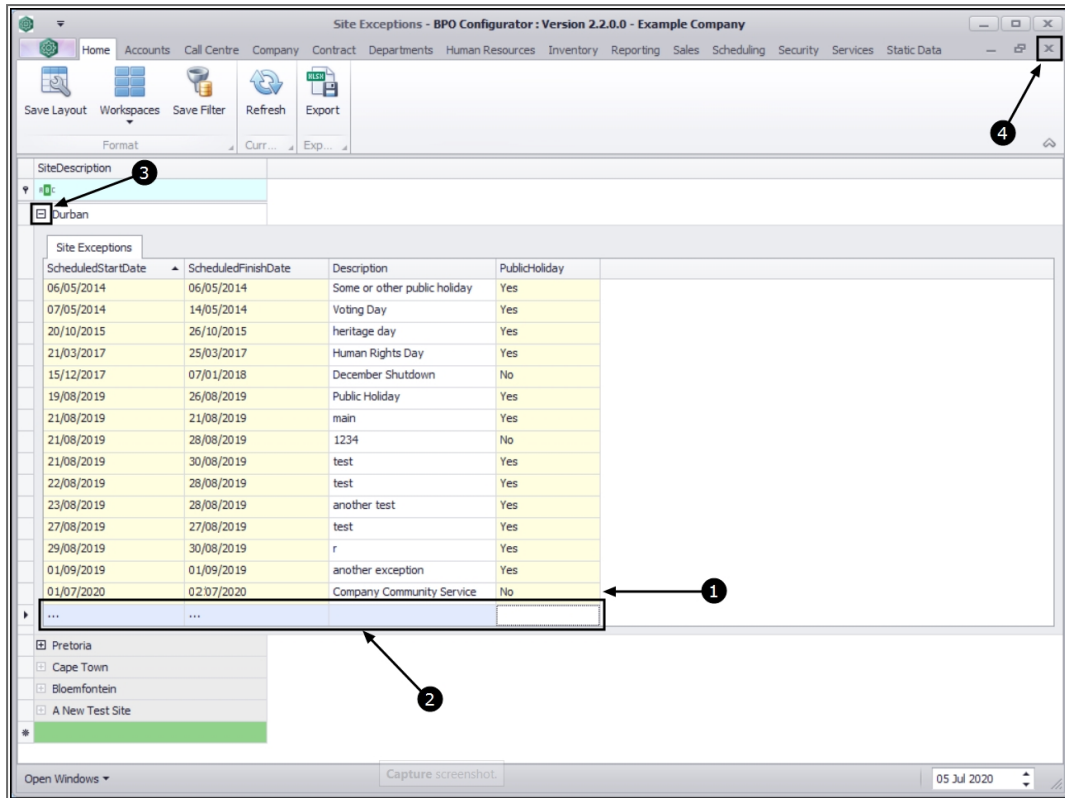
1. Click anywhere outside of the data grid to **save** your changes.
2. An Update message box will pop up asking:  

**"Are you sure you want to save changes to this Site Exception?"**
3. Select **Yes**.



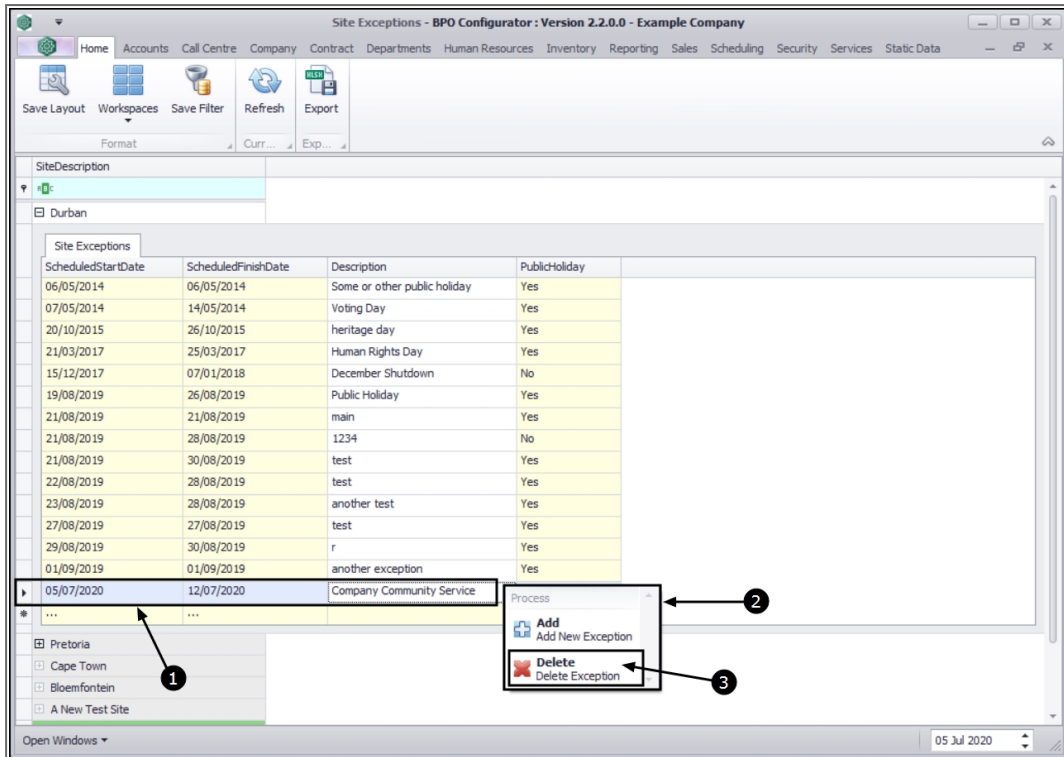
1. The new Site Exception will be saved.
2. A new row will be created in the data grid.
3. When you are done, collapse the Site Exceptions data grid and
4. Exit the screen.





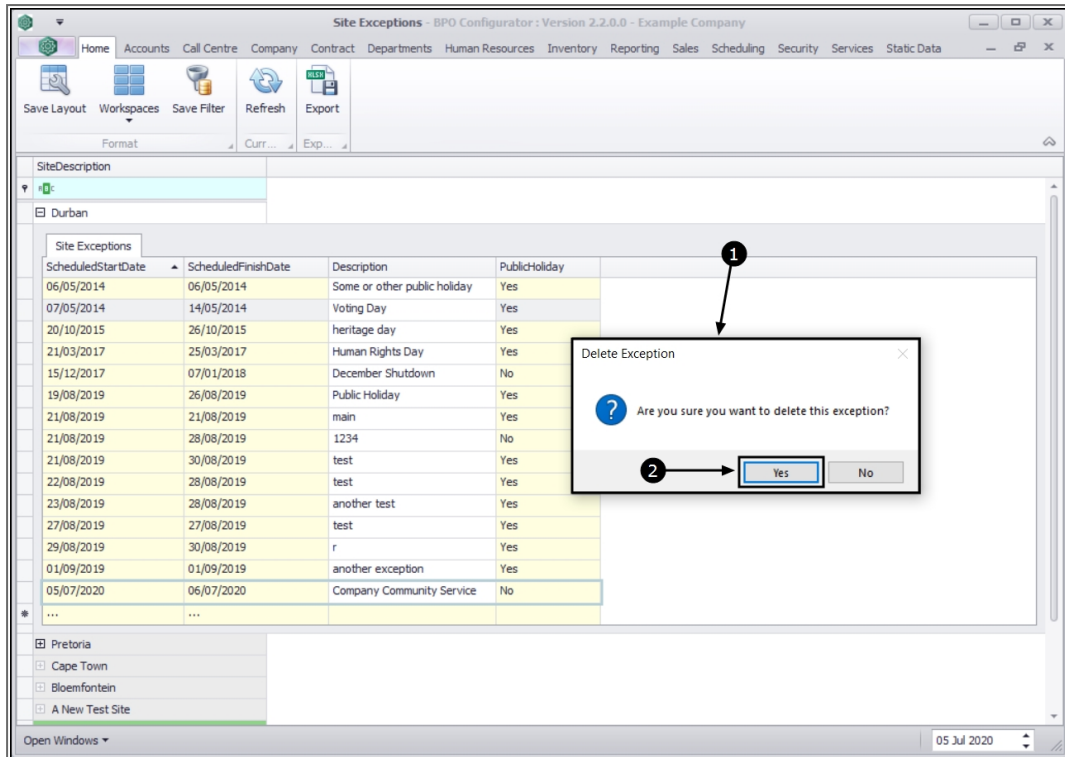
## DELETE SITE EXCEPTION

1. In the Site Exceptions data grid, right click in the row of the Exception that you wish to delete.
2. The Process menu will pop up.
3. Select Delete - Delete Exception.



1. A Delete Exception message box will pop up asking:  

**"Are you sure you want to delete this exception?"**
2. Click on Yes.



1. The selected Site Exception will be **deleted** from the data grid.
2. When you are done, **collapse** the Site Exceptions data grid and
3. **Exit** the screen.

Site Exceptions - BPO Configurator : Version 2.2.0.0 - Example Company

Home Accounts Call Centre Company Contract Departments Human Resources Inventory Reporting Sales Scheduling Security Services Static Data

Save Layout Workspaces Save Filter Refresh Export

Format Curr... Exp...

SiteDescription

- Durban

ScheduledStartDate	ScheduledFinishDate	Description	PublicHoliday
06/05/2014	06/05/2014	Some or other public holiday	Yes
07/05/2014	14/05/2014	Voting Day	Yes
20/10/2015	26/10/2015	heritage day	Yes
21/03/2017	25/03/2017	Human Rights Day	Yes
15/12/2017	07/01/2018	December Shutdown	No
19/08/2019	26/08/2019	Public Holiday	Yes
21/08/2019	21/08/2019	main	Yes
21/08/2019	28/08/2019	1234	No
21/08/2019	30/08/2019	test	Yes
22/08/2019	28/08/2019	test	Yes
23/08/2019	28/08/2019	another test	Yes
27/08/2019	27/08/2019	test	Yes
29/08/2019	30/08/2019	r	Yes
01/09/2019	01/09/2019	another exception	Yes
...	...		

Pretoria  
 Cape Town  
 Bloemfontein  
 A New Test Site

Open Windows 05 Jul 2020

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