

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.

Ribbon Access: Configurator > Scheduling > Site Exceptions

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

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	Accounts	Call Centre	Company	Contract	Departments	Human Resources	Inventory	Reporting	Sales	Scheduling	Security	Services	Static Data	
Site Exce	eptions	-2									D			\$

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.



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ы	07/05/2014	14/05/2014	Voting Day	Yes									
H.	20/10/2015	26/10/2015	heritage day	Yes									
H	21/03/2017	25/03/2017	Human Rights I	Day Yes									
H	15/12/2017	07/01/2018	December Shut	down No									
	19/08/2019	26/08/2019	Public Holiday	Yes									
H	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									
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	Bloemfontein 2		3										
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- 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.



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	12 13 14	15	16	17	18		test			Yes									
	19 20 21	22	23	24	25		anoth	er test		Yes									
	26 27 28	29	30	31			test			Yes									
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*	05/07/2020	· ·	12/0	7/2020)					No									
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- 1. The selected new start date will populate the field.
- 2. Follow the same process to change the **Scheduled Finish** date, if required.



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DESCRIPTION

- 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.



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	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		-					
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	∃ Pretoria		_	Yes							
	Cape Town		9	NO							
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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.



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	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	Update		×		-	
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	22/08/2019	28/08/2019	Are you sure you	want to save changes to	this site Exception?			
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	29/08/2019	30/08/2019		103	cuncer			
	01/09/2019	01/09/2019	another exception	Yes		-		
*	01/07/2020	02/07/2020	Company Community Service	e No				
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- 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.



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		Site Exceptions - BPO Conf	igurator : Version 2.	2.0.0 - Exam	ple Company					
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Site Exceptions										
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							
01/07/2020	02:07/2020	Company Community Service	No	،	-0					
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Pretoria		X								
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A New Test Site		2								
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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.



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	Home Accounts	Call Cantra Company	Contract Departments Human Dec		Departing	Calor	Schoduling	Convibu	Convisoo	Static Data			×
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	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									
۱.	05/07/2020	12/07/2020	Company Community Service	Process	*	•	0						
*				Add		-	9						
	Pretoria			Add New Exc	eption								U
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1. A Delete Exception message box will pop up asking:

"Are you sure you want to delete this exception?"

2. Click on Yes.



0	Ŧ		Site Exceptions - BPO Conf	figurator : Versio	on 2.2.0.0 - Exan	nple Company	r					х
	Home Accounts	Call Centre Company	Contract Departments Human F	Resources Inver	ntory Reporting	Sales Sched	uling Security	Services	Static Data	_	8	×
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Sa	ave Layout Workspaces	Save Filter Refresh B	Export									
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Y	REC.											n
	🗉 Durban											
	Site Exceptions											
	ScheduledStartDate	 ScheduledFinishDate 	Description	PublicHoliday		ų	,					
	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	Delete Exception	on			×			
	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	Are y	ou sure you wa	nt to delete th	is exception	?			
	21/08/2019	28/08/2019	1234	No								
	21/08/2019	30/08/2019	test	Yes	6	[Vac	No				
	22/08/2019	28/08/2019	test	Yes	9		162	NO				
	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								
	05/07/2020	06/07/2020	Company Community Service	No								
*												U
	Pretoria											
	Cape Town											
	Bloemfontein											
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- 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

۲	Ŧ		Site Exceptions - BPO Config	urator : Version 2.2.0	0.0 - Example Compan	y			
100	Home Accounts	Call Centre Company	Contract Departments Human Re	sources Inventory	Reporting Sales Sche	duling Security	Services Static Data		8 X
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	siteDescription								
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14	-) Durban								
	Site Exceptions								
	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								
H	Cape Town								
	Bloemfontein								
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