We are currently updating our site; thank you for your patience.
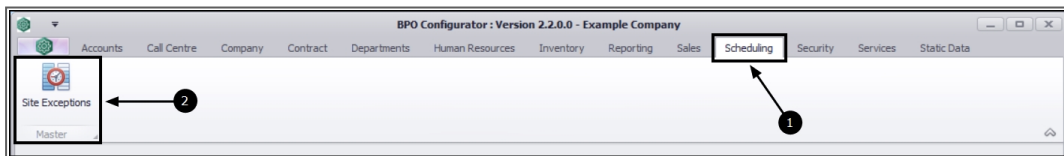
SCHEDULING

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

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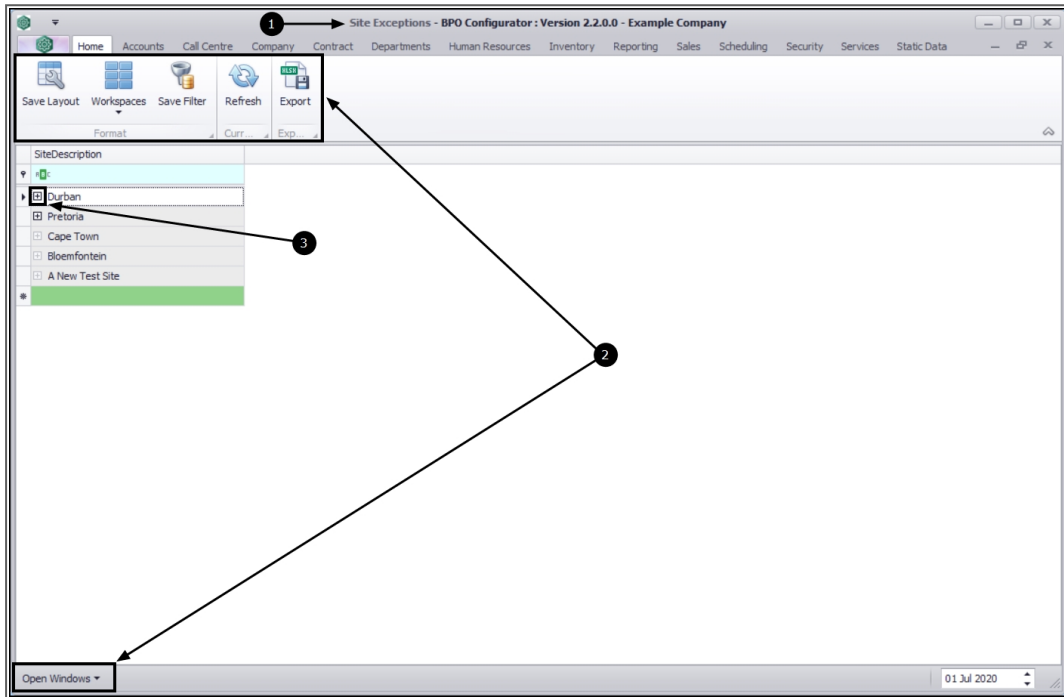2. Click on Site Exceptions.

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
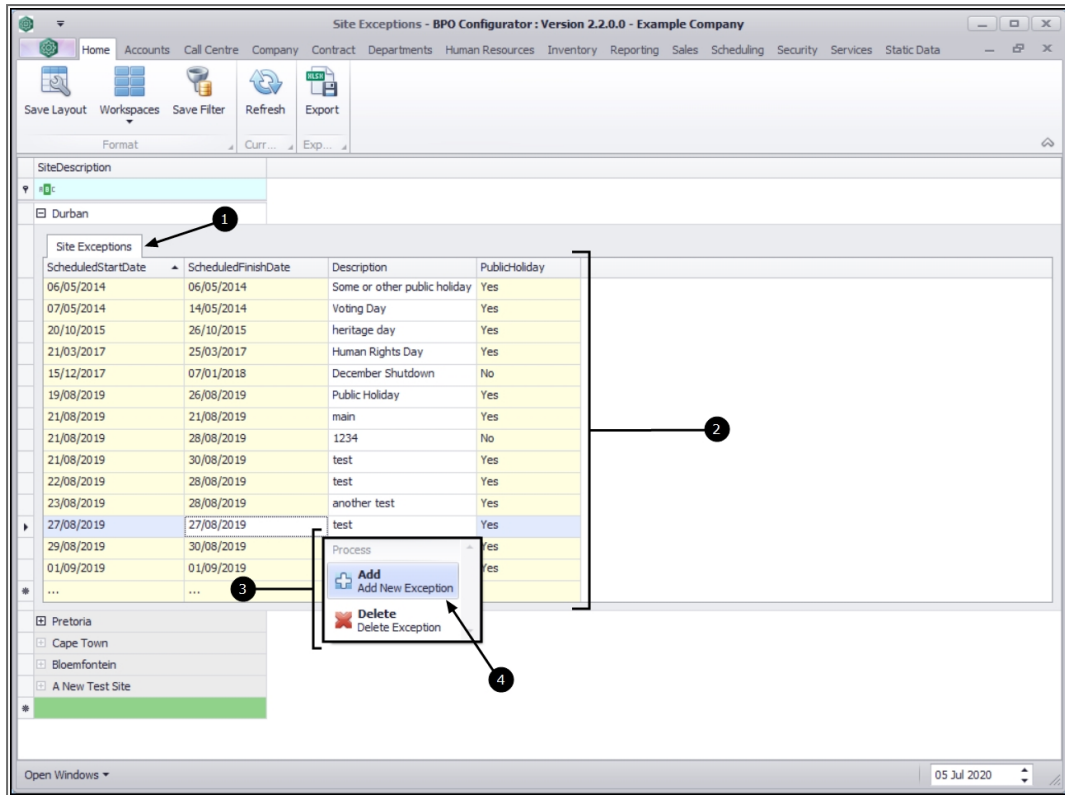
- **Refresh**: Clicking on this button will update the currently displayed page.
- Export
- Open Windows

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.
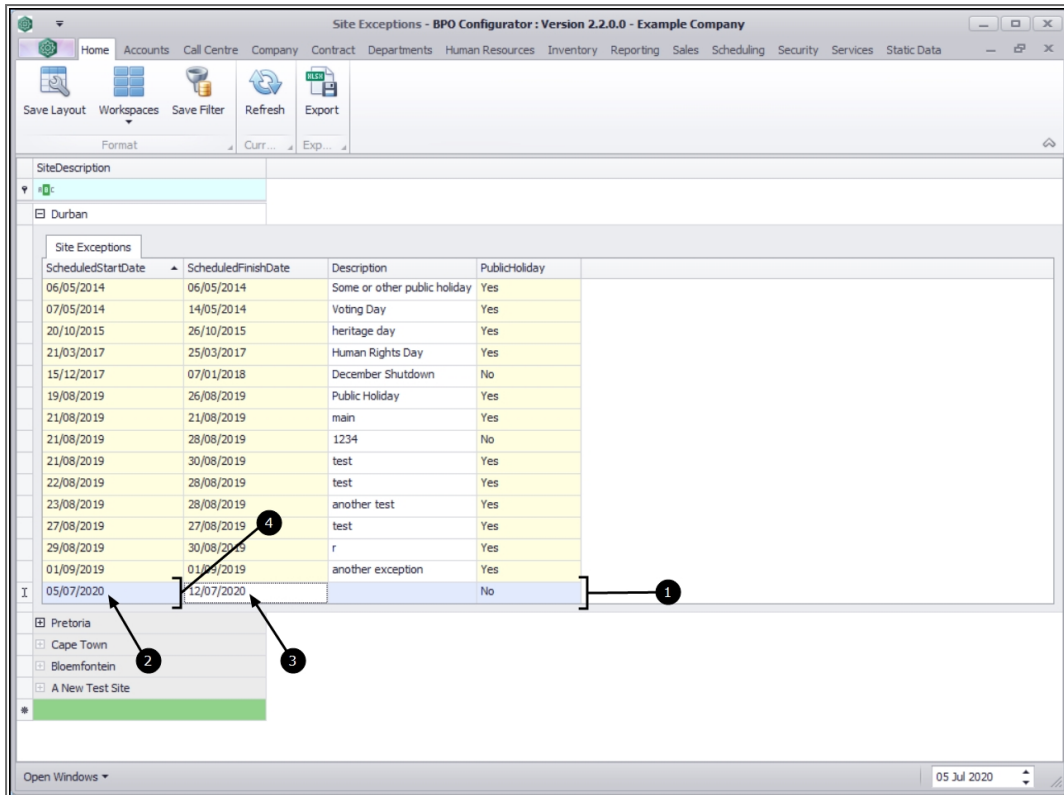

ADD NEW EXCEPTION

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.
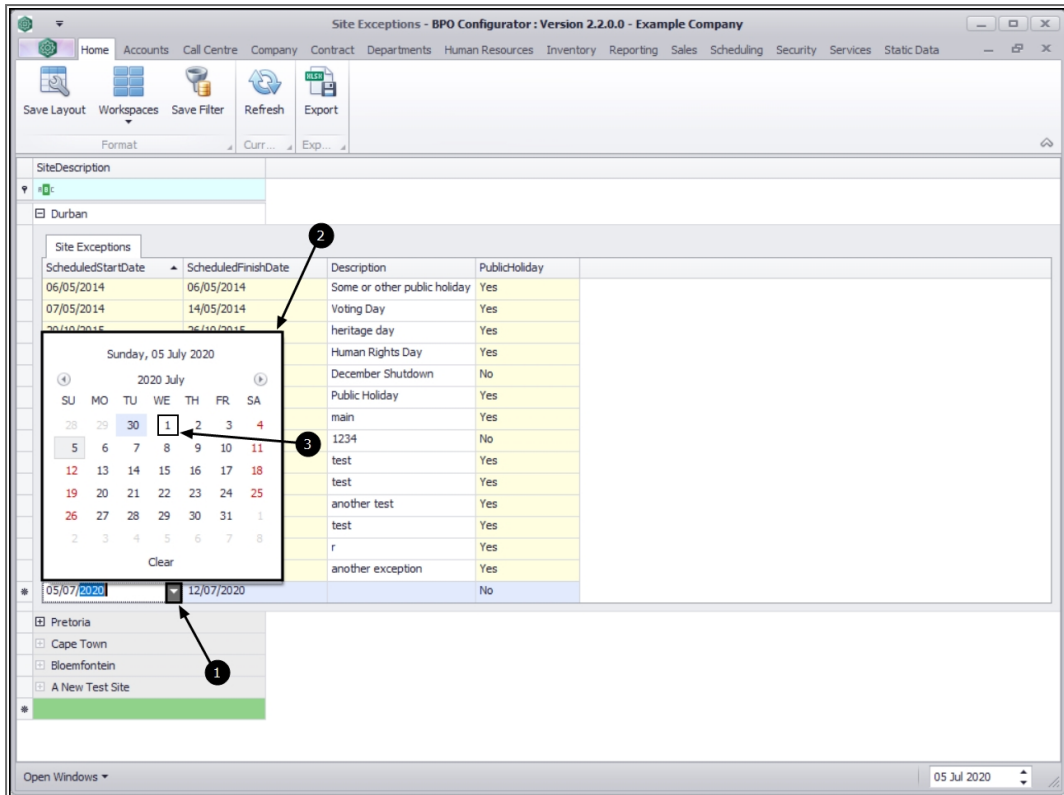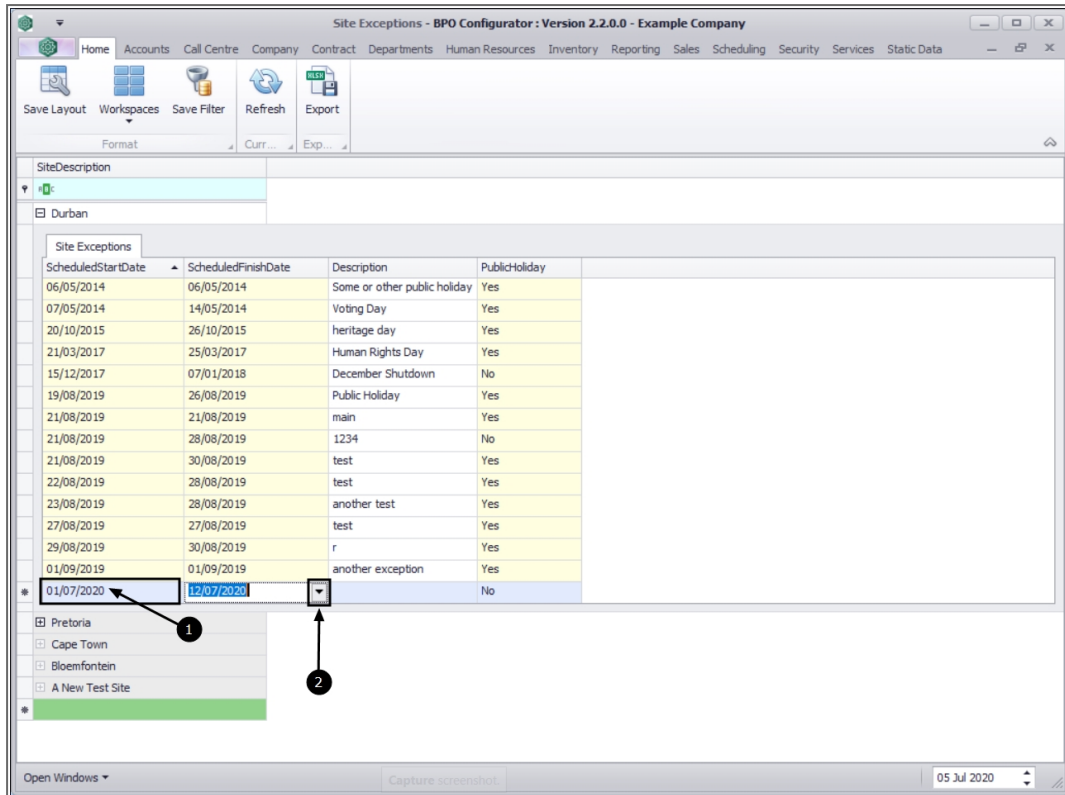4. Click on **Add** - Add New Exception.

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.
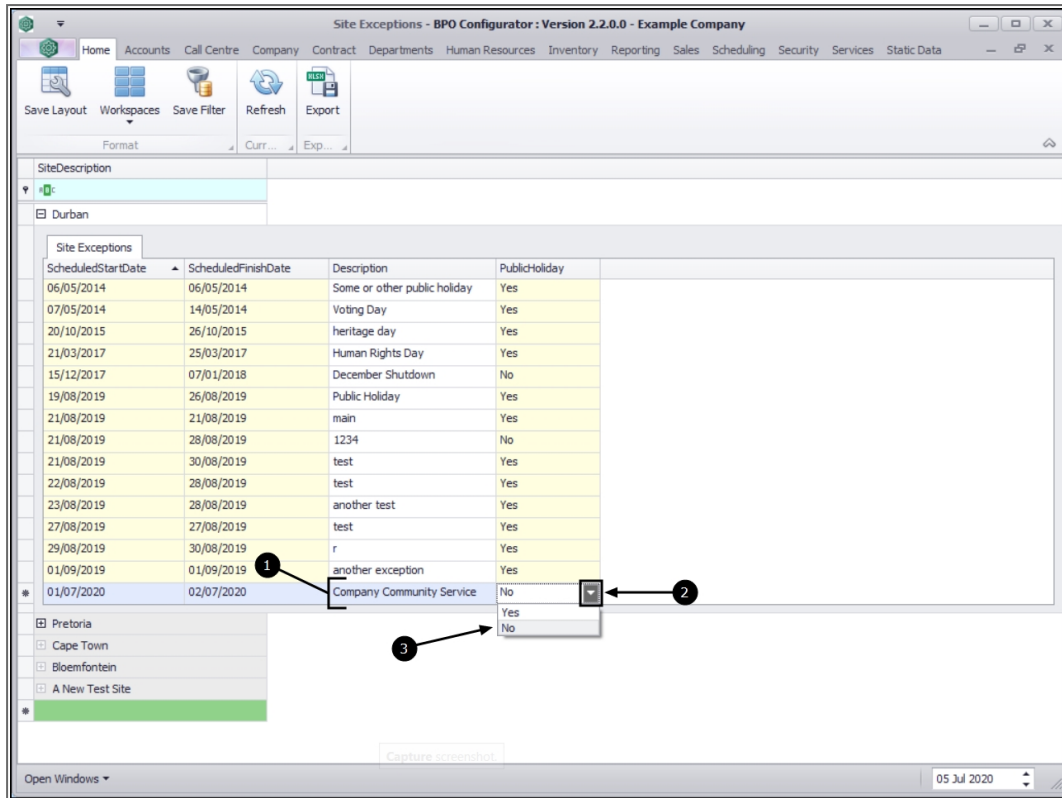3. Select the required alternative date in the calendar.

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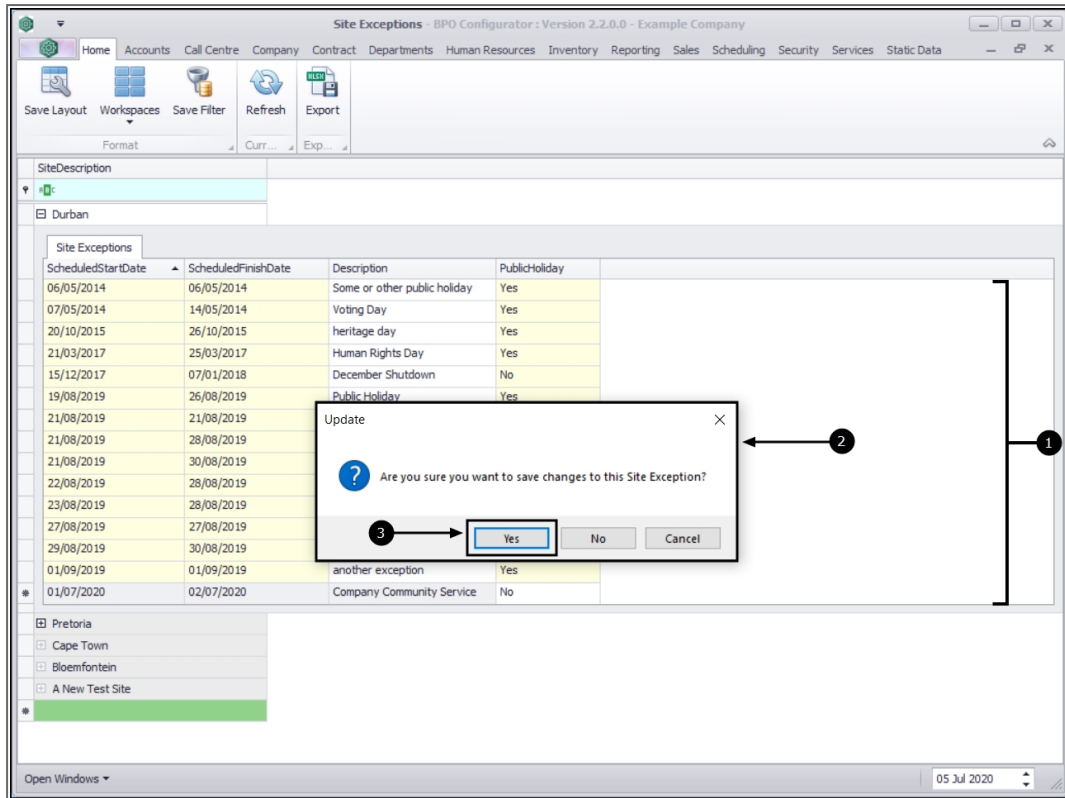
DESCRIPTION

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.
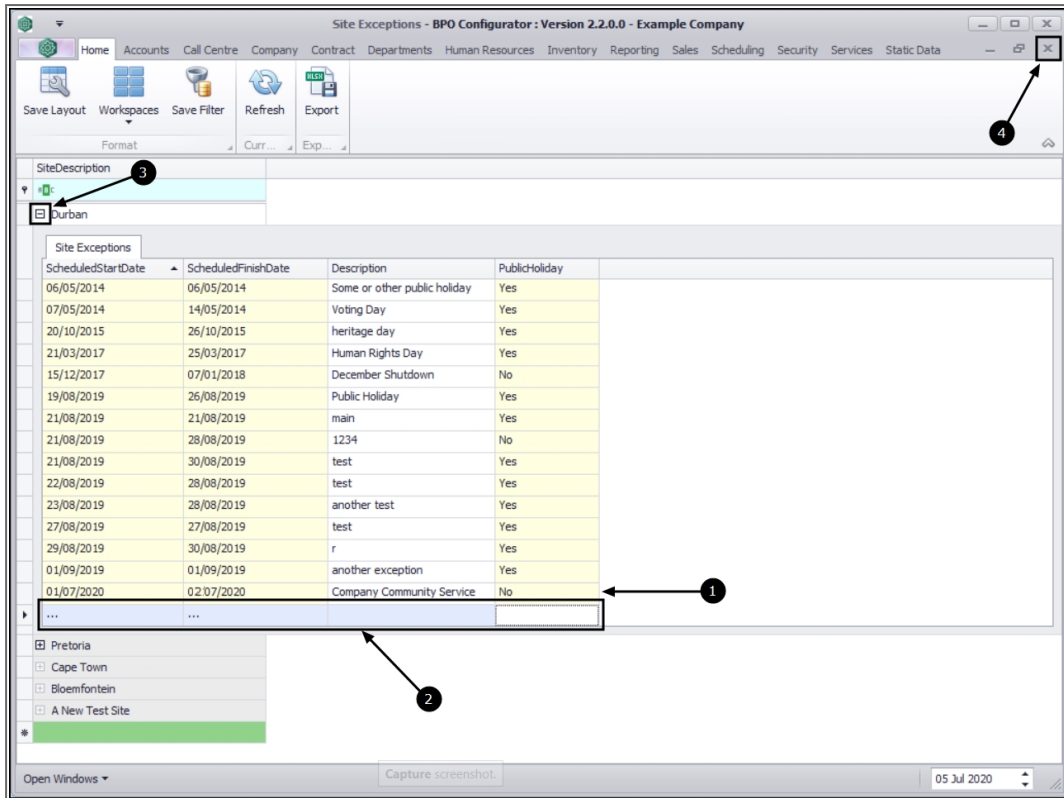
SAVE NEW SITE EXCEPTION

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?**"
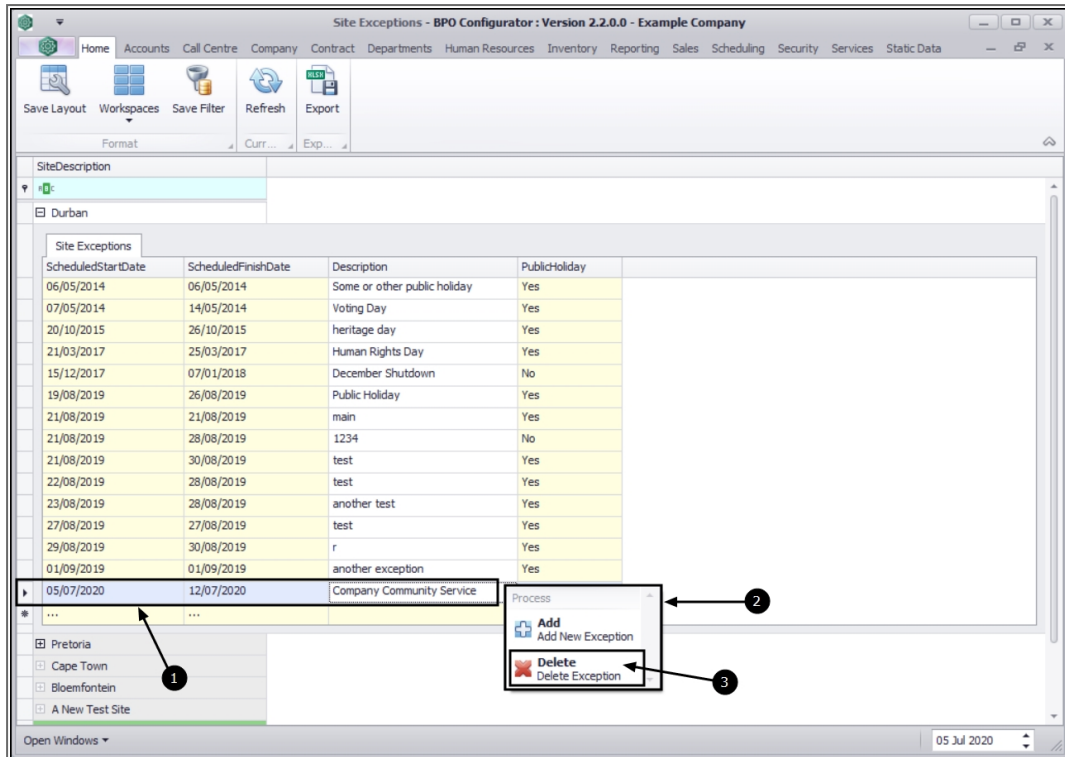3. Select **Yes**.

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
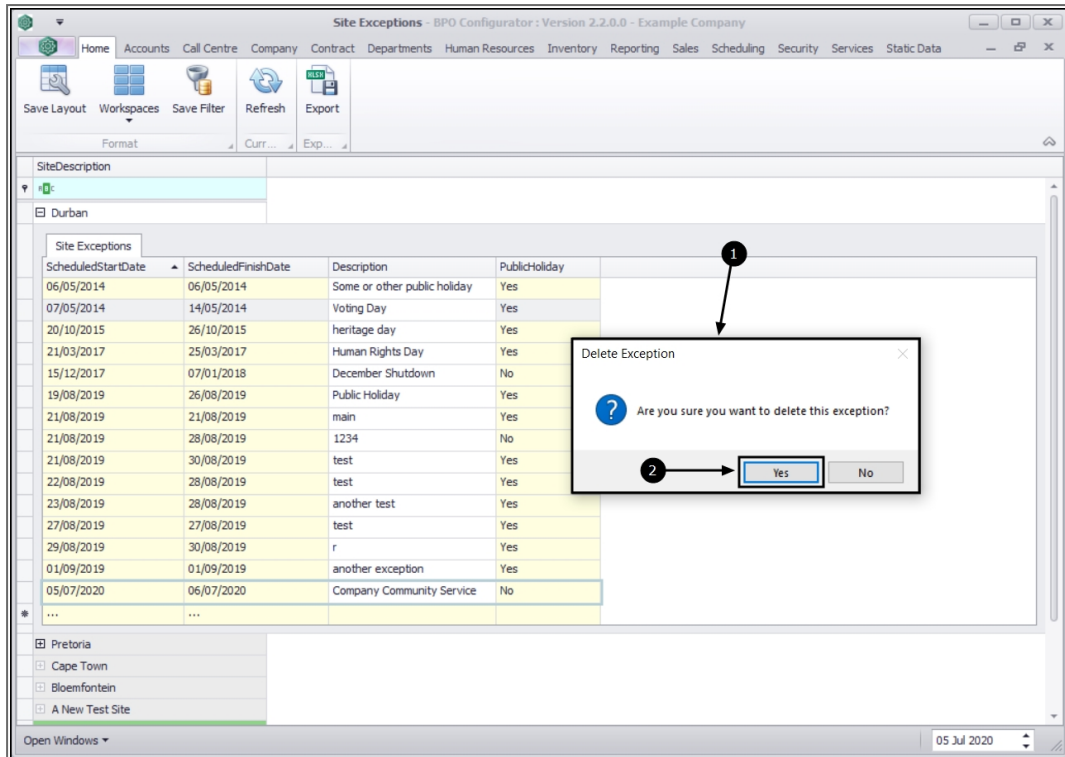
4. **Exit** the screen.

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.

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