

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

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



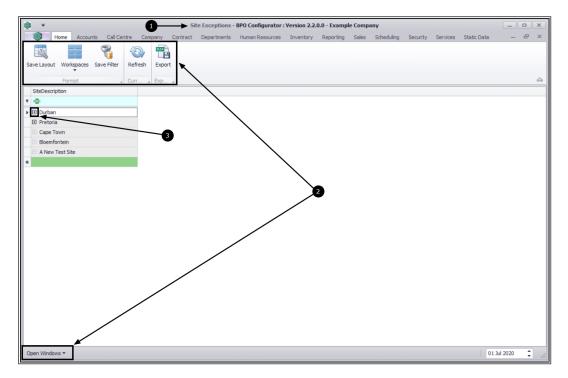
SELECT SITE

- 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

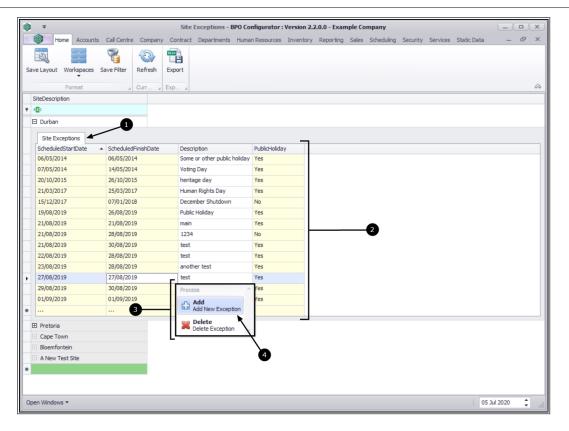
3. In the **Site Descriptions** data grid, select the site where you wish to view / add or edit the exception. In this example, Durban has been selected.



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.



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|-----|---|---|------------------------------|---------------------|----------------|------------------|----------|-------------------|-------------|-----|---|
| | Home Accounts | Call Centre Company C | Contract Departments Huma | Resources Invent | ory Reporting | Sales Scheduling | Security | Services Static D | ata — | 8 X | c |
| Sav | ve Layout Workspaces | Save Filter Refresh Ex | port | | | | | | | | |
| | Format | ∡ Curr ∡ Ex | p | | | | | | | 6 | 0 |
| 9 | SiteDescription | | | | | | | | | | |
| | 🗉 Durban | | | | | | | | | | |
| | | | | | | | | | | | |
| | Site Exceptions | | | | | | | | | | |
| | | ScheduledFinishDate | Description | PublicHoliday | | | | | | | |
| | 06/05/2014 | 06/05/2014 | Some or other public holiday | | | | | | | | |
| | 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 | 01/9/2019 | another exception | Yes | - | | | | | | |
| I | 05/07/2020 | 12/07/2020 | | No | 1 | | | | | | |
| | Pretoria Cape Town Bloemfontein A New Test Site | 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.



| • • | Site Exceptions - BPO Cor | nfigurator : Version | 2.2.0.0 - Exam | nple Company | | | _ | |
|--|------------------------------|----------------------|----------------|------------------|-------------------|---------------------|------------|-----|
| Home Accounts Call Centre Company C | ontract Departments Humar | Resources Invento | ory Reporting | Sales Scheduling | Security Security | ervices Static Data | _ | e x |
| Save Layout Workspaces Save Filter Refresh Exp | Dort | | | | | | | ~ |
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| | | | | | | | | |
| Durban | | | | | | | | |
| | 2 | | | | | | | |
| 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 | | | | | | |
| Sunday, 05 July 2020 | Human Rights Day | Yes | | | | | | |
| ④ 2020 July | December Shutdown | No | | | | | | |
| SU MO TU WE TH FR SA | Public Holiday | Yes | | | | | | |
| 28 29 30 1 2 3 4 | main | Yes | | | | | | |
| 5 6 7 8 9 10 11 3 | 1234 | No | | | | | | |
| 12 13 14 15 16 17 18 | test | Yes | | | | | | |
| 19 20 21 22 23 24 25 | test | Yes | | | | | | |
| 26 27 28 29 30 31 1 | another test | Yes | | | | | | |
| 2 3 4 5 6 7 8 | test | Yes | | | | | | |
| Clear | r | Yes | | | | | | |
| * 05/07/2020 12/07/2020 | another exception | Yes | | | | | | |
| * 05/07/2020 | | No | | | | | | |
| 🗈 Pretoria | | | | | | | | |
| 🗄 Cape Town | | | | | | | | |
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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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| Home Accounts | Call Centre Company C | Contract Departments Huma | n Resources Invent | ory Reporting | Sales Scheduling | Security | Services Static Data | - | æ) |
| 21 | R 42 F | | | | | | | | |
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| 8 BC | | | | | | | | | |
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| Site Exceptions | | | | | | | | | |
| | ScheduledFinishDate | Description | PublicHoliday | | | | | | |
| 06/05/2014 | 06/05/2014 | Some or other public holiday | | | | | | | |
| 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 | 12/07/2020 | - | No | | | | | | |
| Pretoria | | | | | | | | | |
| Cape Town | • | | | | | | | | |
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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.



| Save | Home Accounts | ¶ € ¶ | Contract Departments Human R B | Resources Inventory | Reporting S | Sales Scheduling | Security Se | rvices Static Data | _ | 8 x |
|------|----------------------------------|-----------------------------------|---|----------------------|-------------|------------------|-------------|--------------------|----------|-----|
| Save | Layout Workspaces S | ave Filter Refresh E | | | | | | | | |
| Save | Layout Workspaces S | ave Filter Refresh E: | | | | | | | | |
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| | teDescription | | | | | | | | | |
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| 8 | Durban | | | | | | | | | |
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| | Site Exceptions | | | | | | | | | |
| | ScheduledStartDate O6/05/2014 | ScheduledFinishDate 06/05/2014 | Description Some or other public holiday | PublicHoliday 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 | | 2 | | | | |
| Đ | Pretoria | | - | Yes No | | | | | | |
| | Cape Town | | 3 | NU | | | | | | |
| | Bloemfontein | | | | | | | | | |
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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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|----|----------------------|---|------------------------------|-------------------------|----------------------|-------------------|----------------------|--------------|
| 1 | Home Account | s Call Centre Company | Contract Departments Human | Resources Inventory | Reporting Sales So | heduling Security | Services Static Data | _ & × |
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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 | Update | | × | < | | |
| | 21/08/2019 | 28/08/2019 | 1 | | | | -2 | -0 |
| | 21/08/2019 | 30/08/2019 | | | | | • | |
| П | 22/08/2019 | 28/08/2019 | Are you sure you w | ant to save changes to | this Site Exception? | | | |
| | 23/08/2019 | 28/08/2019 | 1 | | | | | |
| H | 27/08/2019 | 27/08/2019 | | | | | | |
| Н | 29/08/2019 | 30/08/2019 | | Yes N | o Cancel | | | |
| П | 01/09/2019 | 01/09/2019 | another exception | Yes | | | | |
| * | 01/07/2020 | 02/07/2020 | Company Community Service | No | | | | |
| E, | B Pretoria | | | | | | | |
| | Cape Town | | | | | | | |
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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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|-------------------------|---|------------------------------|----------------------|---------------|------------------|-------------------|-------------|--------------|
| Home Accounts | Call Centre Company | Contract Departments Human R | lesources Inventory | Reporting S | Sales Scheduling | Security Services | Static Data | _ & × |
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| Site Exceptions | | | | | | | | |
| | 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 | | | |
| | | | | | | | | |
| Pretoria | | K | | | | | | |
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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 Centre Company C | ontract Departments Human Re | sources Inventory | Reporting S | Sales Scheduling | Security | Services | Static Data | - | Ð | × |
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| E |] Durban | | | | | | | | | | | |
| | | | | | | | | | | | | |
| | Site Exceptions | ScheduledFinishDate | D | PublicHoliday | | | | | | | | |
| Ы | ScheduledStartDate 06/05/2014 | Scheduled-inishDate 06/05/2014 | Description Some or other public holiday | Yes | | | | | | | | |
| H | 07/05/2014 | 14/05/2014 | Voting Day | Yes | | | | | | | | |
| - | 20/10/2015 | | | Yes | | | | | | | | |
| | | 26/10/2015 | heritage day | | | | | | | | | |
| | 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 | | | | | | | | |
| ۶. | 05/07/2020 | 12/07/2020 | Company Community Service | Process | | 6 | | | | | | |
| * | | | | bhA io | | J | | | | | | |
| F | Pretoria | | | Add New Exce | eption | | | | | | | U |
| 14 | Cape Town | - | | 🥁 Delete | | | | | | | | |
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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.



| ٥ | Ŧ | | Site Exceptions - BPO Conf | igurator : Versi | on 2.2.0.0 - Exam | nple Company | | | | | |
|----|------------------------|-----------------------|------------------------------|------------------|-------------------|---------------------|-------------|--------------|----------|------|-----|
| | Home Accounts | Call Centre Company | Contract Departments Human F | Resources Inve | ntory Reporting | Sales Scheduling | Security | Services Sta | tic Data | _ | 8 x |
| Sa | ve Layout Workspaces S | Save Filter Refresh E | xport | | | | | | | | \$ |
| | SiteDescription | | | | | | | | | | |
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| | 🗉 Durban | | | | | | | | | | |
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| | Site Exceptions | | | | | 1 | | | | | _ |
| | | ScheduledFinishDate | Description | PublicHoliday | | Т | | | | | |
| | 06/05/2014 | 06/05/2014 | Some or other public holiday | Yes | | 1 | | | | | |
| | 07/05/2014 | 14/05/2014 | Voting Day | Yes | | 1 | | | | | |
| | 20/10/2015 | 26/10/2015 | heritage day | Yes | | | | | - | | |
| | 21/03/2017 | 25/03/2017 | Human Rights Day | Yes | Delete Exceptio | in | | | < | | |
| | 15/12/2017 | 07/01/2018 | December Shutdown | No | | | | | | | |
| | 19/08/2019 | 26/08/2019 | Public Holiday | Yes | | ou sure you want to | delete this | automican? | | | |
| | 21/08/2019 | 21/08/2019 | main | Yes | Are yo | ou sure you want to | delete this | exception: | | | |
| | 21/08/2019 | 28/08/2019 | 1234 | No | | | | | | | |
| | 21/08/2019 | 30/08/2019 | test | Yes | 6 | ► | Yes | No | | | |
| | 22/08/2019 | 28/08/2019 | test | Yes | | | 105 | 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 | | | | | | | |
| * | | | | | | | | | | | |
| | Pretoria | | | | | | | | | | |
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| | A New Test Site | | | | | | | | | | |
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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

| v | | Site Exceptions - BPO Config | urator : Version 2.2.0 | .0 - Example Cor | mpany | | | | _ |
|------------------|-----------------------------|--------------------------------|------------------------|------------------|------------|------------|--------------|----------|-----|
| Home A | counts Call Centre Company | Contract Departments Human Res | sources Inventory R | eporting Sales | Scheduling | Security S | Services Sta | tic Data | _ @ |
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| ave Layout Works | oaces Save Filter Refresh E | Export | | | | | | | 3 |
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| SiteDescription | 2 | | | | | | | | |
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| 🖂 Durban | | | | | | | | | |
| Site Exceptions | | | | | | | | | |
| ScheduledStartDa | te 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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