Creating a Callout Using the Rule Picker

The rule picker is used to create a callout based on extended employee attributes similar to the [Roster Rule Builder](#). The rule picker is used to build the list of employee to call on-the-fly.

To Create a New Callout

1. Click the **Callout** tab. The *Callout* screen displays.

2. Click the **Create** button.

3. Select a callout type from the **Type** dropdown.

4. Click the calendar icon to the right of the **Work Start** date and time to select a start date and time, if necessary.

5. Enter up to 100 characters in the **Description** field. This information displays on the *View Open Callouts* screen as well as other ARCOS reports. The employee does not see or hear the description field as part of the callout process. The purpose of this field is to aid you in identifying the callout when you pull reports. If you do not enter a description, ARCOS uses the name of the current user, type of callout, work start time and date, reason, and location to create a description for the callout.

6. Click the calendar icon to the right of the **Work End** date and time to select an end date and time, if necessary.

   Note: The **Work End** time must be greater than the **Work Start** time or you will receive a *pop-up* when you try to save the callout or advance to the *Roster Picker*.

7. Select a callout reason from the **Reason** dropdown. A default callout reason, determined by the company, may appear in this field.

8. Select a custom message from the *Custom Msg* dropdown, if necessary ***-OR-***

   Only the first 50 characters of *Custom Messages* will display in the **Custom Msg** dropdown field on the *Create Callout* page. If the message exceeds the limit of 50 characters, it will be followed by an ellipsis (…) and will have a mouse over so that you can hover your mouse pointer on the message to see the full description.

   Note: The mouse over feature allowing you to view the full description is only available to customers using *Internet Explorer* (IE) version 7.0.

   Create a custom message from the *Callout Create* page.

   1. Click the **Enable Wave2Web/TTS** link in the *Custom Msg* section of the page.

   2. Click the **TTS** button to create a custom message via Text-to-Speech ***-OR-***

      Skip to step 6 to create a custom message using the microphone attached to your PC.

   3. Type the custom message in the textbox that appears below the **TTS** button.

   4. Click the **Convert** button.

5. Make any necessary changes to the text and repeat steps 4 and skip to step 10.

6. Click the **Record** button and speak the custom message into the microphone.

7. Click the **Stop** button once you are done recording.

8. Click the **Play** button to listen to the custom message.

9. Repeat steps 6 through 8 until satisfied with the recording.

10. Click the **Upload** button.

11. Type a name for the new custom message in the textbox where the *Custom Message* dropdown was.

12. Click the **OK** button.

7.

9. Click to select each appropriate attribute selection. Attributes vary based on company preferences. For an explanation of the **Attributes**, see [Callout Definition Table](#).

10. Click to select each appropriate override selection. Overrides vary based on company preferences. For an explanation of the **Overrides**, see [Callout Definition Table](#).

11. Click the **Save** button.

12. Select the attribute to filter by from the **Attribute** dropdown.

13. Select *the condition* in which the value of the attribute should be filtered.

- **Equals**: When selected, only employees with the attribute with exact value entered in the **Value** field will be added to the roster. For example, if the employee's value for an attribute is **78895** and the value entered for the roster rule is **7889**, the employee will not be added to the list because the two values do not match exactly.

- **Not Equal**: When selected, employees with the attribute with exact value entered in the **Value** field will NOT be added to the roster, but all other users will be added to the list. Other rules should be used with this condition to limit the number of users on the list. For example, if the employee's value for an attribute is **7889** and the value entered for the roster rule is **78895**, the employee will be added to the list because the values do not match exactly.

- **Like**: When selected, employees with the attribute with a similar value entered in the **Value** field will be added to the roster. When using this option, add a percent sign before and after the text that can be similar. For example, if the employee's value for an attribute is **78895** and the value entered for the roster rule is **%7889%**, the employee will be added to the list because the employee's value contains the *7889* string.

- **Note Like**: When selected, employees with the attribute with a similar value entered in the Value field will not be added to the roster. When using this option, add a percent sign before and after the text that cannot be similar. For example, if the employee's value for an attribute is **78895** and the value entered for the roster rule is **%7889%**, the employee will not be added to the list because the employee's value contains the *7889* string. However, if the employee's value was *7886*, they would be included in the roster.

14. Type the value of the attribute to filter.

    Note: If using one of the *Like* conditions, put percent signs (**%**) on either side of the text, to indicate the string of text the rule is looking for.

15. sClick the **Add Row** button to add an additional row to the rule.

    The additional row can be used to make to rule more complex. For example, a rule could be built to contain all employees from a section within the company (defined by an extended attribute) *but then exclude those with a supervisor or manager title description.*

Rule Details

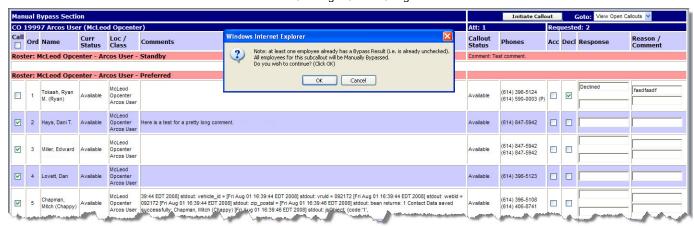| Paren	Attribute	Conditional	Value	Paren	Operator	NOT	Add Row
	Current Org Code ▼	EQUALS ▼	1111		AND ▼		delete
(	Current title desc ▼	NOT LIKE ▼	%Supervisor%		OR ▼		delete
	Current title desc ▼	NOT LIKE ▼	%Manager%	)	▼		delete

Submit Rule   Validate Rule   Cancel

16. Click the **Validate Rule** button to verify the rule is in a usable setup.

17. Click the **Submit Rule** button to complete the rule. The *Manual Bypass* page displays.

18. Enter any *Manual Bypass* information in the *Manual Bypass* table. If your company uses the 1-2 Rest Rule, *your Manual Bypass Section identifies employees who are not available due to the rule*.

Manual Bypass Section   Initiate Callout

CO 1543 Arcos User (McLeod Location)   Att: 1   Reque

Call ☑	Ord	Name	Curr Status	Loc / Class	Comments	Callout Status	Phones	Acc
Roster: McLeod Location - Arcos User - Regular								
☐	1	Chapman, Mitch (Exclusive Rule)	Available	McLeod Location Arcos User		Available	(614) 847-5942	☐
☑	2	Loader, Data	Available	McLeod Location Arcos User		Available	(614) 847-5942	☐
☑	3	Support, Mcleod	Available	McLeod Location Arcos User		Available	(614) 847-5942	☐
☐	4	Conley, Levi (Exclusive Rule)	Rest - 1-2 Rule	McLeod Location Arcos User	yes	Rest - 1-2 Rule	(555) 555-5555	☐
☑	5	Tokash, Ryan	Available	McLeod Location Arcos User		Available	(614) 847-5942	☐
☐	6	Barth, Olga (Notify Only)	Available	McLeod Location Arcos User		Available	(614) 847-5942	☐
☐	7	McAuley, Sean	Working - Normal Shift	McLeod Location Arcos User		Working - Normal Shift	(614) 847-5942	☐
☐	8	Hays, Dani (Exclusive Rule)	Rest - 1-2 Rule	McLeod Location Arcos User		Rest - 1-2 Rule	(555) 555-5555	☐
☑	9	McGuire, Brenda	Available	McLeod Location Arcos User		Available	(614) 847-5942	☐

- If the checkbox in the *Call* column to the left of any employee is grayed out, the employee cannot be called for the pending callout.

- Right-click the checkbox to change the box to pink and override the exception so the employee may be called. This applies to the current roster ONLY. If the employee is on any subsequent chained rosters, the schedule exception is still in place.

- If you uncheck the *Call* box for all employees AFTER you enter Bypass results for any employees in the list, you will receive a pop-up that warns you responses for all available employees will be changed to *Manually Bypassed* if you continue.

19. Click the **Initiate Callout** button to initiate the callout. The *View Open Callouts* screen displays.

Note: Not all companies have all of the items described in the Online Help.
Please note, the ARCOS online documentation is a living document that is always under review. If you see information that is inconsistent with the behavior in the application, or you do not see a page covering an ARCOS feature you would like to know more about, please contact the ARCOS Support Center.

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