Filtering by Qualifications at the Sub-Callout Level

Qualification based callouts call only employees who have the specified qualifications assigned to their contact record in ARCOS. Qualifications are added to ARCOS via [Extended Employee Attributes](#) page on the SysAdmin tab and are assigned to employees through the [Employee Modify](#) page.

To Create a Qualification Based Callout

1. Click the **Create** button on the *Callout* tab. The *Callout Create* page displays.
2. Select the desired callout type from the *Type* dropdown.
3. Click the calendar icon to the right of the **Work Start** date and time to select a start date and time.
4. Click the calendar icon to the right of the **Work End** date and time to select an end date and time.

   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*.

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. Select a callout reason from the **Reason** dropdown.
7. 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.

8. Click to select each appropriate attribute selection. Attributes vary based on company preferences. For an explanation of the **Attributes**, see Callout Definition Table.

9. Click to select each appropriate override selection. Overrides vary based on company preferences. For an explanation of the **Overrides**, see Callout Definition Table.

10. Click the **Save** button.

11. Click to select a roster from the *Roster Picker* table. The roster title turns pink.

    Note: If the roster resides in a different location, click the **Loc Selector** button to select the location.

12. Click the **cmt?** link to *view comments associated with the roster*. If no comments are available, the **cmt?** link changes to **N/A** when you click it.
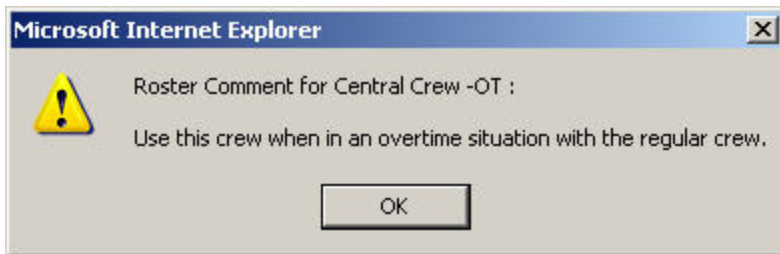
13. Click the *avail? link* to see how many employees are available for the callout from the selected roster, if desired.

    The **avail?** link queries the database and counts the current number of available and existing employees for each roster in the list.

    For example, 2/4 means that there are two employees available for the callout and there are a total of four employees in that roster.

14. Enter the number of employees required from the roster to be used in the callout in the **Quantity** field.

15. Click the **Submit** button. The information you entered in the *Callout Definition* table and the *Roster Picker* table is saved. The *Sub-Callout* and *Manual Bypass* information displays.

    - The sub-callouts table displays one row per roster selected for the callout.

    - Sub-callouts are also referred to as child callouts.

    - You can modify the number of employees required for the callout, the number of attempts ARCOS makes through the list, and whether or not the roster is chained in the *Sub-Callout* table.

- You can also remove a roster from the callout by clicking the **Delete** button in the *Action* column.

16. Make modifications to the *Sub-Callout(s)* table by changing any of the following options (if your company uses the option):

    - The number of employees required (**# Req**, to modify the number of employees requested from each sub-callout),

    - The *number of attempts* (**Attempts**), or

      You can configure the *Callout* page to automatically allow a specified number of attempts before going to **Wait** status. If you have the option, you may also configure a delay period between attempts.

    - Chaining (**Chain**), if your company has this feature. ([Click here for more information on Chaining](.).)

17. Select the qualifications need for each sub-callout.

    a. Click the **edit** link in the *Qual Filter* section of *the sub-callout table*.

    b. Select the attribute to filter by from *the Qualifications Filter* dropdown.

    c. Click the **add** button.

    d. Select the value or values from *the Values Menu* for the attribute.

    e. Click the **Save** button if you are done adding qualifications, *- or -*

      Repeat steps b-d to add additional qualifications for filtering.

   Note: If multiple *Qualifications* are selected, only employees who have all of the selected *Qualifications* will be called.

18. Click the **Add New Class/WG** button to include any additional rosters in the callout.

19. Enter any *Manual Bypass* results in the *Manual Bypass* table.

- 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.

Note: ARCOS allows you to submit a callout if no one is available in the roster you select. When you initiate the callout, you receive a *message* that you must confirm to continue the callout.

20. 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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