Accessibility Guidelines for Cisco Unified Contact Center Management Portal

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PREFACE

Purpose

This document explains the level of accessibility that Unified Contact Center Management Portal supports and how these accessibility features should be used.

Audience

This document is intended for all users of the Management Portal, from high-level administrators to team supervisors. The reader needs no technical understanding beyond a basic knowledge of how to use computers.

Organization

Chapter 1, "Welcome"

Describes the accessibility offered by the text-only interface.

Chapter 2, "Text-only Users"

Explains how to create users that use the text-only interface, and how to change from the existing interface to the text-only one.

Chapter 3, "Using Text-only Mode"

Explains what functionality is available in text-only mode, and provides step-by-step guides to how to perform all necessary tasks.

Obtaining Documentation, Obtaining Support, and Security Guidelines

For information on obtaining documentation, obtaining support, providing documentation feedback, security guidelines, and also recommended aliases and general Cisco documents, see the monthly What's New in Cisco Product Documentation, which also lists all new and revised Cisco technical documentation, at:

http://www.cisco.com/en/US/docs/general/whatsnew/whatsnew.html

1. WELCOME

About Accessibility

The Unified Contact Center Management Portal offers users the option of using a simpler, more accessible interface, but one with comparatively restricted functionality. This text-only interface does not provide the usability of the core user interface, but provides multiple accessibility features. These accessibility features will greatly aid users who are accessing the application using specialist accessibility software such as screen readers and magnifiers.

Accessibility Support

The Unified Contact Center Management Portal provides accessible functionality by means of an alternative, text-only, interface. This does not currently provide all the functionality available in the standard interface. This document highlights the functionality that is supported and how actions may be performed.

Accessibility is supported in the text-only application by the following:

- No stylization and graphics on application user interfaces
- Common titles and text for all page items
- Identifying column and header labels for each list item
- Providing a mechanism to skip repetitive navigation
- No usage of client-sided scripting languages

Requirements for Accessible Users

Users that require the Unified Contact Center Management Portal's accessible funcationality must first be created as text-only users.

It is possible for an existing user to change to text-only functionality once they have logged in, however the mechanism for doing so is not accessibility-friendly. Therefore it is recommended that the user be set up as a text-only user by their system administrator before they log in to the application. Details of how to do this are provided in chapter 2 of this manual.

2. TEXT-ONLY USERS

About Text-only Users

To access the text-only functionality, a user's settings must identify them as a text-only user. This can be done by the user themselves or by an administrative user.

Once the change has been made the user is required to log out of their existing session and log in again to access the text-only functionality.

Switching to Text-only

To display the **Text-only** user interface you will need to log in to the Unified Contact Center Management Portal and click **Settings**.

To change the user's settings to text-only:

1. Select the **Text Only Mode** checkbox.
2. Click **OK**.

Note This setting will not take effect until the user next logs in to the Management Portal

Creating a Text-only User

When creating a user it is possible to set them to text-only mode, so that when they log in to the application they will immediately be presented with the text-only version of the site.

To create a text-only user:

1. From the **Tools** page select the **View Users** option
2. Select the folder in which to create the user and click the **New** link in the main navigation bar
3. The **New User** page will be shown. Enter the details required ensuring that the **Text Only Mode** checkbox is selected
4. Click **OK** to create the user

Note For more information on creating users and assigning security permissions please refer to the User Manual.

Setting an Existing User to Text-only

To set an existing user to text-only mode:

1. From the **Tools** page select the **View Users** option
2. Select the folder that contains the user
3. Select the properties icon for the user
4. Select the **Text Only Mode** box.
5. Click **OK** to update the user and set them to use text-only mode.

Note

- This setting will not take effect until the user next logs in to the application.
- For more information on creating users and assigning security permissions please refer to the User Manual.

3. USING TEXT-ONLY MODE

Supported Functionality

Different levels of support are provided for different tools:

- **Settings** User settings such as timezone may be set or changed. System and security settings are unavailable
- **Reports** It is not possible to manage reports in text-only mode, though parameter sets may be edited through the System Manager
- **Information Notices** Full support
- **System Manager** Supports provisioning of some items such as users and folders
- **Security Manager** The Security Manager tool is not available, however some security operations (such as creating folders) may be performed in the System Manager

Homepage

On logging in to text-only mode, you will be presented with a simple homepage that presents the available tools and options in a menu bar at the top of the screen. Items such as Folders and Users may be managed directly by following the links from this page as well as by using the System Manager tool.

This homepage cannot be changed.

Settings

You can access the User Settings page by clicking the **Settings** link in your homepage.

To change your user settings, select or overwrite the required fields and click OK.

These fields are explained below.

- **Timezone** Select your local region from the drop down list
- **First Name and Last Name** Change your name. You may want to do this if you have married, or if you normally use a name other than the First Name entered here (such as a middle name)
- **Email** Enter the email address you want the Management Portal to send your emails to, if any
- **Description** Enter a suitable description of yourself (such as job title or departmental role)
- **Data Paging Size** This field dictates the number of selected items to be displayed per page, for example when viewing an item type in the System Manager. Numbers above 20 are not recommended

- **Text Only Mode** Uncheck this box to set your display to the standard interface. You will have to log out and log back in for your display to change

Reports

Reports cannot be managed from the text-only interface, however parameter sets can be created and edited from the System Manager.

Information Notices

Information notices (also sometimes called system notices) are similar to a notice board or Message of the Day feature. Information notices are a useful way to inform all contact center staff of general information in one action and in one location, rather than having to inform each staff member individually. Notices may typically include changes to agent assignments or important customer information. Once you have logged in, any information notices which apply to you are displayed in your homepage.

You can access the Information Notices tool by clicking the link at the top of your homepage.

To View/Edit an Information Notice

On opening the Information Notices tool, a list of the information notices available in the current folder is displayed.

To view an Information Notice:

1. Using the drop-down menu from the box at the left, navigate to the folder in the tree that contains the Information Notice to be viewed

Note You must click the **Change Folder** button to actually change to this folder. Only the child folders and parent folder of the current folder can be selected. To navigate to a folder further down the folder hierarchy, therefore, you may need to change folder several times.

2. Click on the title of an Information Notice
3. If you wish (and have the appropriate security permissions) you may change any of the details of this item
   - The **Subject** field shows the title of the notice
   - The large **Information Notice Matter** field shows the full text
   - The **Valid From** and **Valid To** fields show start and end dates
4. Click **Update Information Notice** to save any changes. A red success message will appear near the top of the screen

To Create an Information Notice

2. Click **Create Information Notice**. The Create Information Notice page will be displayed

3. Using the drop-down menu from the box at the left, navigate to the folder in the tree whose users are the target audience for the new notice
4. The folder name will be displayed in the **Current Folder** box above. Then perform the following:
   - In the **Subject** field enter a title for the notice
   - In the large **Information Notice Matter** field enter the text
   - In the **Valid From** and **Valid To** fields, enter start and end dates to define the lifetime of the notice
5. Click **Create Information Notice**. A success message will be displayed in red near the top of the screen

To Move/Delete an Information Notice

To move an information notice:

1. Using the drop-down menu from the box at the left, navigate to the folder that contains the Information Notice to be moved
2. Check the box(es) of the Information Notice(s) to be moved
3. Click **Move Information Notices**.
4. Navigate to the folder to which the Information Notice is to be moved
5. Click **Move to This Folder**

To delete an information notice:

1. Using the drop-down menu from the box at the left, navigate to the folder that contains the Information Notice to be deleted
2. Check the box(e)s of the Information Notice(s) to be deleted
3. Click **Delete Information Notices**.

Managing the System

The System Manager tool is used to create resource folders and certain resources. You can access the System Manager tool by clicking the link at the top of your homepage.

Supported Items

It is possible to edit the name and description of all provisionable types (for a list of provisionable items see the Manage the System section in the User Manual) through the text-only System Manager. These updates will only be applied to the records in the Unified Contact Center Management Portal Database and will not be applied to their original source.

The only items that may be created through the text-only System Manager are users, groups and folders. These can also be created directly from the links at the top of your homepage.

Report descriptions may be viewed using the System Manager but cannot be edited.

To view/edit an item

To view or edit an item using the System Manager:

1. Using the drop-down menu from the box at the left, navigate to the folder that contains the item to be viewed. A summary list of items will be displayed

Note You must click the **Change Folder** button to actually change to this folder. Only the child folders and parent folder of the current folder can be selected. To navigate to a folder further down the folder hierarchy, therefore, you may need to change folder several times.

2. Click **Display System Items** to see system items such as users and folders, and **Display Resource Items** to see resource items such as agents and skillgroups
3. Select the type of item you wish to view. A list of items of that type (such as agents) will be displayed
4. Click on the item to view
5. If you wish (and have the appropriate security permissions) you may change the name or description of this item
    - When editing a user, you may edit any of the fields described in the To Create a User section below
6. Click **Update <*item*>** to save your changes. A red success message will appear near the top of the screen

To Move/Delete an Item

To move an item:

1. Using the drop-down menu from the box at the left, navigate to the folder that contains the item to be moved
2. Click **Display System Items** to see system items such as users and folders, and **Display Resource Items** to see resource items such as agents and skillgroups
3. Select the type of item you wish to view. A list of items of that type (such as agents) will be displayed
4. Check the box(es) of the item(s) to be moved
5. Click **Move <*items*>**.
6. Navigate to the folder to which the item(s) is to be moved
7. Click **Move to This Folder**

To delete an item:

1. Using the drop-down menu from the box at the left, navigate to the folder that contains the item to be deleted
2. Check the box(e)s of the item(s) to be deleted
3. Click **Delete Information Notices**.

To Create a User

The Create User page is only available from the User Sub Menu. You must be able to view at least one user that already exists in the system before you can create a new user.

While viewing users:

1. Click **Create User**
2. If necessary, use the drop-down menu from the box at the left to navigate to the folder in which to create the user
3. Fill in the following fields:
   - In the **Login Name** field enter the name as it will appear in the system for the new user
   - In the **First Name** and **Last Name** fields enter the user's details
   - In the **Email** field enter the email address of the new user
   - In the **Description** field enter any explanatory text, if required
   - The **User Home Folder** defaults to the same folder as the user is created in. This is the folder in which the user starts when they log in. For example, a supervisor user in Basic Mode will be able to browse any teams and skillgroups in their home folder, plus teams and agents they are a supervisor for
   - In the **Password** field enter the password for the new user
   - In the **Confirm Password** field re-enter the selected password
4. Select the following checkboxes if applicable:
   - The **Advanced** checkbox if the user is to be capable of accessing the Tools page in order to potentially create resources, manage security, or other advanced functions

Note The number of advanced users should be limited.

   - The **Enabled** checkbox to ensure that the user is live in the system. If unchecked the new user will be saved in the system but will not be able to access it
   - The **User must change password at next Logon** checkbox to prompt the new user to change their password after their first login
   - The **Password Never Expires** checkbox to assign the password to the new user indefinitely
   - The User **cannot change password** checkbox to prevent the new user from being able to change their password

5. Click **Create User**. A red success message will appear near the top of the screen

To Create a Group

The Create Group page is only available from the Group Sub Menu. You must be able to view at least one group that already exists in the system before you can create a new group.

While viewing groups:

1. Click **Create Group**
2. If necessary, use the drop-down menu from the box at the left to navigate to the folder in which to create the user
3. Fill in the following fields:
   - In the **Name** field enter the name for the new group
   - In the **Description** field enter any explanatory text, if required
4. Click **Create Group**. A red success message will appear near the top of the screen

To Create a Folder

The Create Folder page is only available from the Folder Sub Menu. You must be able to view at least one folder that already exists in the system in order to create a new folder.

While viewing folders:

1. Click **Create Folder**
2. If necessary, use the drop-down menu from the box at the left to navigate to the folder in which to create the folder
3. Fill in the name and description of the folder
4. Click **Create Folder**. A red success message will appear near the top of the screen