



Accessibility Guidelines for Cisco Unified Contact Center Management Portal

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CONTENTS

Preface	v
Purpose	v
Audience	v
Organization	v
Obtaining Documentation	vi
Documentation Feedback	vii
Cisco Product Security Overview	vii
Obtaining Technical Assistance	viii
1. Welcome	12
About Accessibility	12
Accessibility Support	12
Requirements for Accessible Users	12
2. Text-only Users	13
About Text-only Users	13
Switching to Text-only	13
Creating a Text-only User	13
Setting an Existing User to Text-only	13
3. Using Text-Only Mode	15
Supported Functionality	15
Homepage	15
Settings	15
Reports	16
Information Notices	16
To View/Edit an Information Notice.....	16
To Create an Information Notice.....	16

To Move/Delete an Information Notice	17
Managing the System.....	17
Supported Items.....	17
To view/edit an item	18
To Move/Delete an Item.....	18
To Create a User.....	19
To Create a Group	20
To Create a Folder	20

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

Cisco documentation and additional literature are available on Cisco.com. Cisco also provides several ways to obtain technical assistance and other technical resources. These sections explain how to obtain technical information from Cisco Systems.

Cisco.com

You can access the most current Cisco documentation at this URL:

<http://www.cisco.com/techsupport>

You can access the Cisco website at this URL:

<http://www.cisco.com>

You can access international Cisco websites at this URL:

http://www.cisco.com/public/countries_languages.shtml

Product Documentation DVD

Cisco documentation and additional literature are available in the Product Documentation DVD package, which may have shipped with your product. The Product Documentation DVD is updated regularly and may be more current than printed documentation.

The Product Documentation DVD is a comprehensive library of technical product documentation on portable media. The DVD enables you to access multiple versions of hardware and software installation, configuration, and command guides for Cisco products and to view technical documentation in HTML. With the DVD, you have access to the same documentation that is found on the Cisco website without being connected to the Internet. Certain products also have .pdf versions of the documentation available.

The Product Documentation DVD is available as a single unit or as a subscription. Registered Cisco.com users (Cisco direct customers) can order a Product Documentation DVD (product number DOC-DOCDVD=) from Cisco Marketplace at this URL:

<http://www.cisco.com/go/marketplace/>

Ordering Documentation

Beginning June 30, 2005, registered Cisco.com users may order Cisco documentation at the Product Documentation Store in the Cisco Marketplace at this URL:

<http://www.cisco.com/go/marketplace/>

Nonregistered Cisco.com users can order technical documentation from 8:00 a.m. to 5:00 p.m. (0800 to 1700) PDT by calling 1 866 463-3487 in the United States and Canada, or elsewhere by calling 011 408 519-5055. You can also order documentation by e-mail at tech-doc-store-mkpl@external.cisco.com or by fax at 1 408 519-5001 in the United States and Canada, or elsewhere at 011 408 519-5001.

Documentation Feedback

You can rate and provide feedback about Cisco technical documents by completing the online feedback form that appears with the technical documents on Cisco.com.

You can send comments about Cisco documentation to bug-doc@cisco.com.

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170 West Tasman Drive

San Jose, CA 95134-9883

We appreciate your comments.

Cisco Product Security Overview

Cisco provides a free online Security Vulnerability Policy portal at this URL:

http://www.cisco.com/en/US/products/products_security_vulnerability_policy.html

From this site, you can perform these tasks:

- Report security vulnerabilities in Cisco products.
- Obtain assistance with security incidents that involve Cisco products.
- Register to receive security information from Cisco.

A current list of security advisories and notices for Cisco products is available at this URL:

<http://www.cisco.com/go/psirt>

If you prefer to see advisories and notices as they are updated in real time, you can access a Product Security Incident Response Team Really Simple Syndication (PSIRT RSS) feed from this URL:

http://www.cisco.com/en/US/products/products_psirt_rss_feed.html

Reporting Security Problems in Cisco Products

Cisco is committed to delivering secure products. We test our products internally before we release them, and we strive to correct all vulnerabilities quickly. If you think that you might have identified a vulnerability in a Cisco product, contact PSIRT:

- Emergencies — security-alert@cisco.com

An emergency is either a condition in which a system is under active attack or a condition for which a severe and urgent security vulnerability should be reported. All other conditions are considered non-emergencies.

- Non-emergencies — psirt@cisco.com

In an emergency, you can also reach PSIRT by telephone:

- 1 877 228-7302
- 1 408 525-6532

We encourage you to use Pretty Good Privacy (PGP) or a compatible product to encrypt any sensitive information that you send to Cisco. PSIRT can work from encrypted information that is compatible with PGP versions 2.x through 8.x.

Never use a revoked or an expired encryption key. The correct public key to use in your correspondence with PSIRT is the one linked in the Contact Summary section of the Security Vulnerability Policy page at this URL:

http://www.cisco.com/en/US/products/products_security_vulnerability_policy.html

The link on this page has the current PGP key ID in use.

Obtaining Technical Assistance

Cisco Technical Support provides 24-hour-a-day award-winning technical assistance. The Cisco Technical Support & Documentation website on Cisco.com features extensive online support resources. In addition, if you have a valid Cisco service contract, Cisco Technical Assistance Center (TAC) engineers provide telephone support. If you do not have a valid Cisco service contract, contact your reseller.

Cisco Technical Support & Documentation Website

The Cisco Technical Support & Documentation website provides online documents and tools for troubleshooting and resolving technical issues with Cisco products and technologies. The website is available 24 hours a day, at this URL:

<http://www.cisco.com/techsupport>

Access to all tools on the Cisco Technical Support & Documentation website requires a Cisco.com user ID and password. If you have a valid service contract but do not have a user ID or password, you can register at this URL:

<http://tools.cisco.com/RPF/register/register.do>

Use the Cisco Product Identification (CPI) tool to locate your product serial number before submitting a web or phone request for service. You can access the CPI tool from the Cisco Technical Support & Documentation website by clicking the **Tools & Resources** link under Documentation & Tools. Choose **Cisco Product Identification Tool** from the Alphabetical Index drop-down list, or click the **Cisco Product Identification Tool** link under Alerts & RMAs. The CPI tool offers three search options: by product ID or model name; by tree view; or for certain products, by copying and pasting show command output. Search results

show an illustration of your product with the serial number label location highlighted. Locate the serial number label on your product and record the information before placing a service call.

Submitting a Service Request

Using the online TAC Service Request Tool is the fastest way to open S3 and S4 service requests. (S3 and S4 service requests are those in which your network is minimally impaired or for which you require product information.) After you describe your situation, the TAC Service Request Tool provides recommended solutions. If your issue is not resolved using the recommended resources, your service request is assigned to a Cisco engineer. The TAC Service Request Tool is located at this URL:

<http://www.cisco.com/techsupport/servicerequest>

For S1 or S2 service requests or if you do not have Internet access, contact the Cisco TAC by telephone. (S1 or S2 service requests are those in which your production network is down or severely degraded.) Cisco engineers are assigned immediately to S1 and S2 service requests to help keep your business operations running smoothly.

To open a service request by telephone, use one of the following numbers:

Asia-Pacific: +61 2 8446 7411 (Australia: 1 800 805 227)

EMEA: +32 2 704 55 55

USA: 1 800 553-2447

For a complete list of Cisco TAC contacts, go to this URL:

<http://www.cisco.com/techsupport/contacts>

Definitions of Service Request Severity

To ensure that all service requests are reported in a standard format, Cisco has established severity definitions.

Severity 1 (S1)—Your network is “down,” or there is a critical impact to your business operations. You and Cisco will commit all necessary resources around the clock to resolve the situation.

Severity 2 (S2)—Operation of an existing network is severely degraded, or significant aspects of your business operation are negatively affected by inadequate performance of Cisco products. You and Cisco will commit full-time resources during normal business hours to resolve the situation.

Severity 3 (S3)—Operational performance of your network is impaired, but most business operations remain functional. You and Cisco will commit resources during normal business hours to restore service to satisfactory levels.

Severity 4 (S4)—You require information or assistance with Cisco product capabilities, installation, or configuration. There is little or no effect on your business operations.

Obtaining Additional Publications and Information

Information about Cisco products, technologies, and network solutions is available from various online and printed sources.

- Cisco Marketplace provides a variety of Cisco books, reference guides, documentation, and logo merchandise. Visit Cisco Marketplace, the company store, at this URL:
<http://www.cisco.com/go/marketplace/>
- Cisco Press publishes a wide range of general networking, training and certification titles. Both new and experienced users will benefit from these publications. For current Cisco Press titles and other information, go to Cisco Press at this URL:
<http://www.ciscopress.com>
- Packet magazine is the Cisco Systems technical user magazine for maximizing Internet and networking investments. Each quarter, Packet delivers coverage of the latest industry trends, technology breakthroughs, and Cisco products and solutions, as well as network deployment and troubleshooting tips, configuration examples, customer case studies, certification and training information, and links to scores of in-depth online resources. You can access Packet magazine at this URL:
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- iQ Magazine is the quarterly publication from Cisco Systems designed to help growing companies learn how they can use technology to increase revenue, streamline their business, and expand services. The publication identifies the challenges facing these companies and the technologies to help solve them, using real-world case studies and business strategies to help readers make sound technology investment decisions. You can access iQ Magazine at this URL:
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or view the digital edition at this URL:
<http://ciscoiq.texterity.com/ciscoiq/sample/>
- Internet Protocol Journal is a quarterly journal published by Cisco Systems for engineering professionals involved in designing, developing, and operating public and private internets and intranets. You can access the Internet Protocol Journal at this URL:
<http://www.cisco.com/ipj>
- Networking products offered by Cisco Systems, as well as customer support services, can be obtained at this URL:
<http://www.cisco.com/en/US/products/index.html>
- Networking Professionals Connection is an interactive website for networking professionals to share questions, suggestions, and information about networking products and technologies with

Cisco experts and other networking professionals. Join a discussion at this URL:

<http://www.cisco.com/discuss/networking>

- World-class networking training is available from Cisco. You can view current offerings at this URL:

<http://www.cisco.com/en/US/learning/index.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 functionality 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.

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.

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