Accessibility Guidelines for Cisco Unified Contact Center Management Portal

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Preface

Purpose

This document explains the accessibility features that Unified Contact Center Management Portal (Unified CCMP) supports and how to use them.

Audience

This document is intended for all users of Unified Contact Center 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

The following table describes the information contained in each chapter of this guide.

Chapter	**Description**
Chapter 1, "Welcome, see page 3." Intended Audience: All audiences	Describes the accessibility offered by the text-only interface.
Chapter 2, "Text-only Users, see page 4." Intended Audience: All audiences	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, "Functionality in Text-only Mode, see page 4." Intended Audience: All audiences	Explains what functionality is available in text-only mode and provides step-by-step procedures to how to perform tasks.

Obtaining Documentation and Submitting a Service Request

For information on obtaining documentation, submitting a service request, and gathering additional information, 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

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We appreciate your comments.

1. Welcome

About Accessibility Support

Unified CCMP provides accessibility functionality by means of an alternative, text-only, interface. Although this text-only interface does not include all features of the standard interface, it does offer accessibility features to aid users who rely on accessibility software such as screen readers and magnifiers when working with Unified CCMP.

This document highlights the functionality that is supported in text-only mode and how to use that functionality.

In addition to the functionality explained in Chapter 3, accessibility is enhanced in the text-only application by the following:

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

Using Accessibility Support

Users who require the Unified CCMP accessible funcationality must be identifed as text-only users.

Although it is possible for existing users to change their settings to text-only once they have signed in, Cisco System recommends that the system administrator create users with the text-only identity before they sign in, as documented in Chapter 2, Text-only Users.

2. Text-only Users

About Text-only Users

Users can access the text-only functionality only if their user settings identify them as text-only users. This can be done by the users themselves after they sign in or by an administrator who set up users.

Creating a Text-only User

Follow this procedure to create users in text-only mode, so that when they sign in to the application they are immediately presented with the text-only version of the site.

1. From the **Tools** page select **User Manager**.
2. Select the folder in which to create the user.
3. Click **New** in the main navigation bar to open the New User page.
4. Complete the required fields and select the **Text Only Mode** check box.
5. Click **OK** to create the user.

Changing an Existing User to Text-only

To set an existing user to text-only mode:

1. From the **Tools** page select **User Manager**.
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 If the administrator makes the change, the setting will take effect the next time the user signs in to the Management Portal.

   If the user makes the change, he or she must log out of the current session and log in again to access the text-only functionality.

For more information on creating users and assigning security permissions, refer to the *Administration Manual for Cisco Unified Contact Center Management Portal*.

3. Functionality in Text-Only Mode

Supported functionality in text-only mode is as follows:

- **Homepage** Simple Homepage.
- **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, although parameter sets may be edited through the System Manager.
- **Information Notices** Full support.
- **System Manager** Support for provisioning of users, groups, and folders.
- **Security Manager** This tool is not available; however some security operations (such as creating folders) may be performed in the System Manager.

Homepage

When you sign in as a text-only user, you access a simple homepage that presents the available tools and options in a menu bar at the top of the screen. You can manage items such as Folders and Users directly by following the links from this page as well as by using the System Manager tool.

You cannot change the homepage.

Settings

To access the User Settings page, click **Settings** in your homepage.

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

These fields as follows:

- **Timezone** Select your local region from the drop-down list.
- **First Name and Last Name** Change your name. Do this, for example, if you marry, or if you normally use a name other than the First Name entered here.
- **Email** Enter the email address where you want the Management Portal to send emails.
- **Description** Enter a suitable description of yourself, such as your job title or departmental role.
- **Data Paging Size** Enter the number of 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 sign out and sign back in for your display to change.

Reports

You cannot manage reports in the text-only interface, you can, however, create and edit parameter sets from the System Manager.

Information Notices

Information notices (also called system notices) are similar to a notice board or Message of the Day feature. They are a useful way to globally inform many contact center staff members of pertinent information, rather than having to inform each staff member individually.

Notices might include changes to agent assignments or important customer information. Once you have signed in, any information notices that apply to a user displays in their homepage.

To access the Information Notices tool, click the link at the top of your homepage.

When the Information Notices tool opens, you see a list of the information notices available in the current folder.

To Create an Information Notice

1. Click **Create Information Notice** to open the Create Information Notice page.
2. Using the drop-down list on the left, navigate to the folder in the tree whose users are the target audience for the new notice. The folder name displays in **Current Folder** box.
3. Complete fields as follows:
   - **Subject** field, enter a title for the notice.
   - **Information Notice Matter** field, enter the text for the notice.
   - **Valid From** and **Valid To** fields, enter start and end dates to define the lifetime of the notice.
4. Click **Create Information Notice**. A success message appears in red near the top of the screen.

To View an Information Notice

1. Using the drop-down list on the left, navigate to the folder in the tree that contains the Information Notice you want to see.
2. You must click the **Change Folder** button to 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, you may need to change folder several times.
3. Click on the title of an Information Notice you want to view.

To Edit an Information Notice

Follow this procedure to change a notice if you have the appropriate security permissions to do so:

1. Using the drop-down list on the left, navigate to the folder in the tree that contains the Information Notice you want to edit.
2. Click on the title of an Information Notice.
3. Change any of the details of this item, as follows:
    - **Subject** field, enter a title for the notice.
    - **Information Notice Matter** field, enter the text for the notice.
    - **Valid From** and **Valid To** fields, enter start and end dates to define the lifetime of the notice.
4. Click **Update Information Notice** to save changes. A red success message appears near the top of the screen.

To Move an Information Notice

1. Using the drop-down list on 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 list on 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**.

System Manager

The System Manager tool is used to create resource folders and certain resources and to edit certain items. To access the System Manager tool, click the link at the top of your homepage.

Supported Items in System Manager

Items that can 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.

It is possible to edit the name and description of all provisionable types through the text-only System Manager. For a list of provisionable items, refer to the *Administration Manual for Cisco Unified Contact Center Management Portal*.

Updates will only be applied to the records in the Unified CCMP database and will not be applied to their original source.

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

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.

1. Click **Create User.**
2. If necessary, use the drop-down list on the left to navigate to the folder in which to create the user.
3. Fill in the following fields:
    - **Login Name** field enter the name as it will appear in the system for the new user.
    - **First Name** and **Last Name** fields enter the user's details.
    - **Email** field enter the email address of the new user.
    - **Description** field enter any explanatory text, if required.
    - **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 is able to browse any teams and skillgroups in their home folder, plus teams and agents they are a supervisor for
    - **Password** field enter the password for the new user.
    - **Confirm Password** field re-enter the selected password.
4. Select the following check boxes if applicable:
    - **Advanced** check box 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.
    - **Enabled** check box to ensure that the user is live in the system. If unchecked the new user is saved in the system but will not be able to access it.
    - **User must change password at next Logon** check box to **prompt** the new user to change their password after their first login.
    - **Password Never Expires** check box to assign the password to the new user indefinitely.
    - **Cannot change password** check box to prevent the new user from being able to change their password.
5. Click **Create User**. A red success message appears 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.

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

To Create a Folder

The Create Folder page is available only 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.

1. Click **Create Folder.**
2. If necessary, use the drop-down list on 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 appears near the top of the screen.

To View an Item in System Manager

1. Using the drop-down list on the left, navigate to the folder that contains the item to be viewed. A summary list of items displays.

   Note You must click the **Change Folder** button to 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, you may need to change folder several times.
2. Click **Display System Items** to see system items such as users and folders. Click **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) displays.
4. Click on the item to view.

To Edit an Item in System Manager

Follow this procedure to change an item if you have the appropriate security permissions to do so:

1. Using the drop-down list on the left, navigate to the folder that contains the item to be edited. A summary list of items displays.

   Note You must click the **Change Folder** button to 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, you may need to change folder several times.

2. Click **Display System Items** to see system items such as users and folders.
3. Click **Display Resource Items** to see resource items such as agents and skillgroups.
4. Select the type of item you wish to edit. A list of items of that type (such as agents) displays.
5. Click on the item to edit.
6. Edit fields as follows:
    - **Login Name** field, edit the name as it will appear in the system for the user.
    - **First Name** and **Last Name** fields, edit the user's details.
    - **Email** field, edit the user’s email address.
    - **Description** field, edit text.
    - **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 is able to browse any teams and skillgroups in their home folder, plus teams and agents they are a supervisor for.
    - **Password** field, edit the password for the new user
    - **Confirm Password** field, re-enter the selected password
7. Click **Update <*item*>** to save your changes. A red success message appears near the top of the screen

To Move an Item

1. Using the drop-down list on 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) displays.
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 list on 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.**