

PureConnect®

2021 R3

Generated:

12-August-2021

Content last updated:

14-August-2019

See Change Log for summary of changes.

GENESYS

Accessibilty Compliance

Technical Reference

Abstract

This technical reference is a general guide for configuring Interaction Desktop to comply with Section 508 standards. Accessibility compliance also includes enhancements based on AODA-UK (Accessibility for Ontarians with Disabilities Act) guidelines. Each business's implementation is unique therefore compliance may require configuration changes that fit your specific environment or users.

For the latest version of this document, see the PureConnect Documentation Library at: http://help.genesys.com/pureconnect.

For copyright and trademark information, see https://help.genesys.com/pureconnect/desktop/copyright_and_trademark_information.htm.

Table of Contents

Table of Contents	2
Introduction	3
Setup Overview	3
Accessibility Parameter	4
Workgroups	5
Create an Accessibility Compliance Workgroup	5
Client Templates	6
Create an Accessibility Compliance Template	6
Apply the Interaction Desktop Workspace Template	10
Interaction Desktop Shortcut Keys	13
My Interactions and Other Queue Shortcuts	13
Directory Shortcuts	14
Command and menu shortcuts	16
Change Log	18

Introduction

We tested PureConnect Interaction Desktop, using the Department of Homeland Security Compliance Test Processes and Tools. See <u>https://www.dhs.gov/compliance-test-processes</u> and <u>https://www.dhs.gov/508-tools</u>.

Note: This document reflects Interaction Desktop accessibility compliance as of version 2019 R3. Earlier versions meet the absolute minimum ADA Rule 508 standards and capabilities. Some customers may find earlier versions unsatisfactory for their use. Accessibility enhancements based on AODA-UK (Accessibility for Ontarians with Disabilities Act) guidelines first appeared in 2019 R3. Genesys has tested only Interaction Desktop for compliance. We have not tested any other ancillary applications.

Administrators must create workgroups and configure client templates for users who require settings that meet 508 Compliance standards. Templates also enable ease of deployment for users who require the accessibility enhancements based on AODA guidelines.

Setup Overview

- 1. Create an Accessibility Compliance Workgroup or Workgroups depending on your organizational needs.
- 2. Create Interaction Desktop Workspace Template or Templates.
- 3. Apply the Interaction Desktop Workspace Template or Templates created in Interaction Administrator.
- 4. Optionally, add the accessibilitycompliant=true server parameter.
- 5. To support text-to-speech output, install the JAWS screen reader on each applicable workstation. Users must start the JAWS screen reader before starting Interaction Desktop.

Note: The JAWS computer screen reader is a licensed, third-party application that is not included with Interaction Desktop.

Copyright and trademark

Accessibility Parameter

To take advantage of optional accessibility compliance enhancements based on AODA-UK guidelines, use the **accessibilitycompliant=true** command line parameter or server parameter.

You can set the server parameter in Interaction Administrator or supply your users with a command line argument. Server parameters affect all Interaction Desktop users in all future sessions. You use a command line argument when starting Interaction Desktop, typically in a Windows shortcut. A command line argument affects only the current user in the current session.

Note: The command line argument overrides the server parameter setting.

Example: "C:\Program Files (x86)\Interactive Intelligence\ICUserApps\InteractionDesktop.exe" - accessibilitycompliant=true

When you set accessibilitycompliant to true:

- Enabled toolbar button names appear in high contrast, making them easier to see and read.
- The screen reader fully describes a selected interaction (name, number, state, and so on.).
 Note: Accessibilitycompliant defaults to "false." In that case, the screen reader describes a selected interaction only by number; for example, 1 of 3.
- If a search fails to find matching records, the screen reader announces that no records were found.

Workgroups

Create one or more workgroups for users with disabilities. Administrators can then ensure consistency across the application and in training with the use of Shortcut Keys and Quick Keys.

Note: You need multiple workgroups if users with disabilities are in different departments or other administrative groups.

Create an Accessibility Compliance Workgroup

Create an Accessibility Compliance Workgroup

1. In the Workgroup area, right-click and select New.

Ð	Interaction Administrator - (blasius)					
File Edit View Context Help						. 8
30200 8 76						
Licenses Allocation	^	Workgroup Name SystemlyrTransferHu	New	Ctrl+N	Ves	Mailbox User
Default User		CompanyOperator	Delete	Del	Yes	
🍫 Roles		workgroup1	Properties	Ent	Yes	
a Users		workgroup2	30002	145	Yes	
Sa Workgroups		workgroup3	30003	Yes	Yes	
Password Policies	100	workgroup4	30004	Yes	Yes	

2. In the Entry Name box, type a workgroup name that identifies the users as well the area to which you assigned them. In this example, the new Workgroup is Call Center Accessibility Users.

3			Interaction Administrator	- [ultima]			- • ×
File Edit View Context							_ 8 >
C X C X X X X X X X X X X X X X X X	^	Workgros	Entry Name	? X	Queue Yes	Mailbox User	Access Control Gro
Default User		workgrou workgrou	Enter Workgroup Name		Yes		Root
Users Workgroups Password Policies		workgrou workgrou workgrou	Call Center Accessibility Users		Yes Yes Yes		Root Root
Schedules Schure Input Forms Wrap-up Cleant Buttons	~		ox	Cancel			
< 111 >	Item	<	Selected: 0			a ultima_use	r Server Time: 3:2

- 3. Follow the instructions in the Interaction Administrator help to configure the organization.
- 4. Add the appropriate users to this workgroup.

Client Templates

Before deploying for accessibility compliance, administrators must create client templates. Client templates ensure consistent Interaction Desktop configuration across all accessibility compliant workgroups. Administrators use Interaction Desktop to create client templates and Interaction Administrator to deploy these templates to selected workgroups.

Warning: If you require users to make these changes themselves, Interaction Desktop configuration and option settings may not be accessibility compliant.

Create an Accessibility Compliance Template

Apply the Interaction Desktop Workspace Template

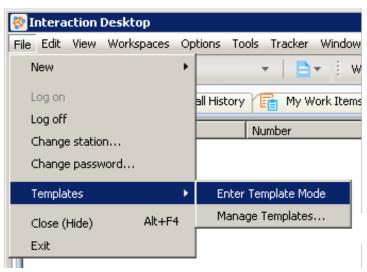
Accessibility Compliance Guide

Create an Accessibility Compliance Template

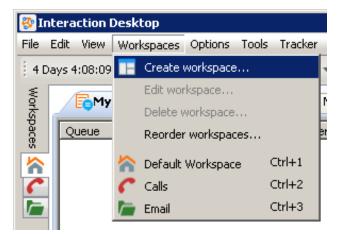
Requirements: The Interaction Desktop user must have a **Client Access** license, the **Manage Client Templates** Security right, and the **Customize Client** Security right.

Note: Depending on your organization, you may need multiple templates to match the various roles of users with disabilities. Repeat these instructions for each template needed.

- 1. Log on to Interaction Desktop.
- 2. Select File > Templates > Enter Template Mode.



3. Select Workspaces > Create workspace.



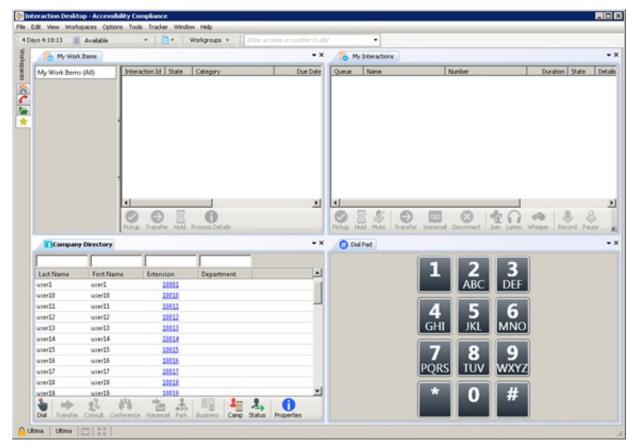
4. In the Create New Workspace dialog, give the Workspace an appropriate Name, Description, and Icon, then click OK.

😵 Create Ne	🤣 Create New Workspace 📃 🗖 🗙					
Name:	Accessibility Compliance					
Description:	Accessibility Compliance					
Icon:						
	OK Cancel					

- 5. If the **Getting Started** view appears in your new custom workspace, right-click its tab and select **Close View** from the menu that appears.
- 6. Add views to the template.

Add the views required for users' everyday tasks to this new workspace. These views include queues and directories to which they need access. In this example, My Work Items, My Interactions, Dial Pad, and Company Directory appear in the Accessibility Compliance workspace.

Tip: For more information about adding views, changing view layout, customizing columns, and customizing toolbars, see the <u>Interaction Desktop help</u>.



7. Select Windows > Quick Keys.

After you create your workspace and add views, assign Quick Keys to your views and workspace to allow easy navigation. Assigning Quick Keys is an important part of accessibility compliance. Quick Keys give users access to the application without requiring interaction with the mouse. Interaction Desktop also includes Shortcut Keys.

😵 In	teraction Desktop - Accessibi	ility Compliance			
File	Edit View Workspaces Option	s Tools Tracker	Windo	w Help	
4 D	ays 4:23:48 📄 Available		N	1ove to next tab group	10
Workspaces	🔒 My Work Items		N	Nove to previous tab group	F
Gpa	A state of Themes (AID	Interaction Id S	F	lename	
Ces	My Work Items (All)		0	Ilose view	E
			C	lose all views	
			<i>4</i>) c	Quick Keys	
	Ā		E 1	My Work Items	
			🔁 2	My Interactions	
			 3 	Company Directory	
			🤀 4	Dial Pad	

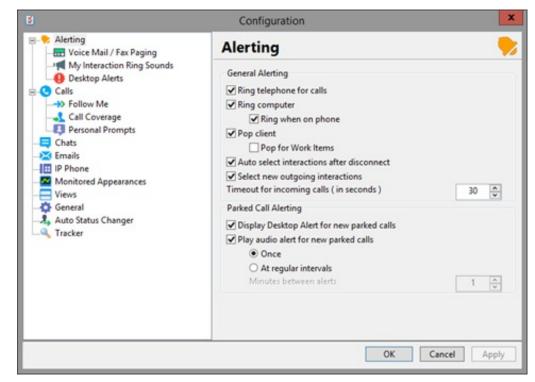
8. In the Quick Keys dialog, assign Quick Keys to the workspace and the views, then click OK.

😵 Quick Keys		
Workspace / View	Quick Key	
🔶 🛧 Accessibility Compliance Template	Ctrl+6	
🚺 Company Directory	Alt+5 💌	
📑 My Work Items	Alt+1	
interactions	Alt+2	
🚺 Company Directory	Alt+4	
🤫 Dial Pad	Alt+3	
🛃 Call History	None 💌	
Calls	Ctrl+2 💌	
🤫 Dial Pad	None 💌	
Contract Con	Ctrl+1	•
Override default Workspace behavior		
0		OK Cancel

Tip: For more information about Quick Keys, click the **help icon** in the dialog box or see **Getting Started** on the Interaction Desktop Help menu.

9. To set client configuration options, select **Options** > **Configuration**.

Client templates can include option settings for Alerts, Calls Configuration, IP Phone and more. For more information, see <u>Configuration Options</u> in the Interaction Desktop help.



10. Select File >Templates > Save Current Template As.

😵 Interaction Desktop -	Acces	ssibility Compliance (Template Mode - Unsaved Template)
File Edit View Workspace	es Op	tions Tools Tracker Window Help Exit Template Mode
New	•	▼ B ▼ Workgroups ▼ Enter a name or
Log on		
Log off		
Change station		Interaction Id State Category
Change password		
Templates	•	Save Current Template
Close (Hide) Alt-	⊦F4	Save Current Template As
Exit		Exit Template Mode

11. Give the template an appropriate, easily identifiable name.

😵 Save Template	×
Available Templates:	
Filter Templates	×
Basic Email Agent	
All Channel Agent	
Basic Email Agent with preview	
Multi-Channel Agent	
Default Template	
Basic Chat Agent	
Touche and the second s	
Template name: Accessiblity Compliance	
	Save Cancel

12. Click Save.

13. Select Exit Template Mode.

Copyright and trademark

Apply the Interaction Desktop Workspace Template

After you create your workgroups and workspace templates, apply the template to the workgroup.

1. In Interaction Administrator, select **People > Client Templates**.

0		Interaction Administ	rator - (ultima)			- 0 ×
File Edit View Con						_ 8 1
3 2 3 0 C 8	2 1					
Structured Param Regionalization Licenses Allocation	Client Templ	ates				0
E People	Select template target	15:				
Roles	Name		Туре		[Select Users
St Workgroups					[Select Roles
Password Policie Schedules	5				1	Select Workgroups
Secure Input For	ms				1	Remove
E Virap-up						Remove All
Client Configurat Configurat Queue Columns Cont Codes C Cont Context Codes C Cont Codes C Cont Codes Control G Skills Codes Control G Access Control G	Config Jermer Recup Select at least one template Select a template to a					1
# System Configuration # Me Interaction Proce			Application			
Phone Numbers		>	<search></search>		•	
Report Logs Accumulators	Accessibility Compliance		Interaction Desktop		^	
🕸 System Paramete			Interaction Desktop			
Status Messages			Interaction Desktop			
Actions	Basic Email Agent		Interaction Desktop			
Mail	Basic Email Agent with pre-	view	Interaction Desktop		~	
Ger Single Sign-On Single Sign-On SureCloud Data Extractor E efficient Proce	Select a template from the li	at				
< =	>					Analy Tomalska
		Items: 7	Selected: 1	Found 1 item(s)	2 ultima_user	Server Time: 9:49:13 AM

- 2. Click Select Workgroups.
- 3. Select and add the workgroup you created for users with disabilities.

0	Interaction Administrator - [ultima]	_ O X
File Edit View Context Help		_ 8 X
Structured Parameters A	Templates	
Licenses Allocation		
B Select templa	te targets:	-
Boles		
& Users Name	Type	Select Users
State Workgroups		Select Roles
Password Policies Schedules		Select Workgroups
a Secure Input Forms		
😠 🏶 Wrap-up	Add Workgroups X	Remove
Client Buttons		Remove All
Outrue Columns	Available items: Selected items: Filter items X	
🛞 🔯 Account Codes Confic	444	
Client Templates Select at least or	Call Center Accessibility Users	
H Stelect at least on	Add all And all An	
Access Control Group Select a temp	workgroup1 workgroup2	
E @ System Configuration	workgroup3 dt Remove all	
H M Interaction Processor Name	workgroup4	
Phone Numbers Search Genet Logs	workgroup5	
Accessibility Co	OK Cancel	<u>^</u>
By System Parameters All Channel Age		
Sametime Server	nt Interaction Desktop	-
Status Messages Basic Chat Age Actions	tt interaction Desktop	
Q Log Retrieval Assistant Basic Email Age	nt Interaction Desktop	
Mail Basic Email Age	nt with preview Interaction Desktop	
H T Single Sign-On	from the file	
PureCloud Select a template Data Extractor	mom the las.	
# Charaction Process AL -		
< III >		Analy Tomoloto
	2	ultima_user Server Time: 9:50:57 AM

4. In the Select a template to apply section, select the appropriate template.

Ð	Interaction Adminis	strator - [ultima]	- 0 X
File Edit View Context H			- 0
3 2 2 0 0 0 8 2 6			
Structured Parameters ~ Regionalization Licenses Allocation	Client Templates		
People Default User	Select template targets:		
Roles	Name	Type	Select Users
St. Workgroups	Call Center Accessibility Users	Workgroup	Select Roles
Password Policies Schedules			Select Workgroups
5 Secure Input Forms			Remove
K 😵 Wrap-up			Remove All
H V Client Configuration			nemove wit
Queue Columns			
🛪 🔯 Account Codes Config			
Client Templates	and the second		
A Skills	Select a template to apply:		
Access Control Group	Name	Application	
System Configuration (# System Configuration	Search 9		
Phone Numbers	Accessibility Compliance	Interaction Desktop	<u>~</u>
Accumulators	All Channel Agent	Interaction Desktop	
System Parameters Sametime Server	Basic Chat Agent	Interaction Desktop	
Status Messages P Actions	Basic Email Agent	Interaction Desktop	
Q Log Retrieval Assistant	Basic Email Agent with preview	Interaction Desktop	v
H C Single Sign-On			
I PureCloud			
A Data Extractor			Apply Template
Interaction Process AL			
III >	1		& ultima_user Server Time 9.55:11 AM

5. Click Apply Template.

Result: A confirmation message appears.

Interaction Desktop	~		
The selected template has been applied		Reset	~

Interaction Desktop Shortcut Keys

Interaction Desktop includes many pre-programmed Shortcut Keys.

Tip: The Shortcut Keys topic in the Interaction Desktop help also contains a complete list of these shortcuts.

My Interactions and Other Queue Shortcuts

Directory Shortcuts

I

L

Command and menu shortcuts

My Interactions and Other Queue Shortcuts

Interaction shortcuts work only if you first select an interaction to ensure it has focus.

Tip: To display a menu that lists these shortcuts, right-click an interaction.

	able *	B Workgr
My Interaction	Cal History	My Work Items
Queue Name	Num	iber
C To: System	Properties	Ctrl+Shift+P
	Call Back	Ctrl+8
e	Pidup	Ctrl+P
2	Hold	Ctrl+H
1		C#I+U
0 8 % 0	Transfer	Ctrl+T
Pickup Hold Mute	Park on Orbit	Ctrl+K
Company Din	Send to Voicemail	Ctrl+M
E Company our	Secure Input	Ctrl+V
	Disconnect	Ctrl+D
Last Name user19	Quick Call Rules	
user2	Interaction Tracker	
user20	Join	Ctrl+3
user21	Listen In	Ctrl+L
user22	Coach	Ctrl+O
ا 🔶 🐌	Record	Ctrl+R
Dial Transfer Co	Pause Recording	Ctrl+E
sus Blassus 🖂 🔂	Secure Pause	Ctrl+Shift+E

Function	Shortcut
<u>Call Back</u>	Ctrl+B
<u>Coach</u>	Ctrl+O
Create Custom Call Rule	Ctrl+Shift+C
Always send caller directly to voice mail	Ctrl+Shift+M
Disconnect	Ctrl+D
Hold	Ctrl+H
Join	Ctrl+J
Listen to a Call	Ctrl+L
Mute Call	Ctrl+U
Park on Orbit	Ctrl+K
Pause Recording	Ctrl+E
Pickup	Ctrl+P
Private	Ctrl+I
Properties	Ctrl+Shift+P
Record	Ctrl+R
Remove from Queue	Ctrl+Shift+R
Request Assistance	Ctrl+N
Secure Input	Ctrl+V
Secure Record Pause	Ctrl+Shift+E
Send to Voicemail	Ctrl+M
Snip	Ctrl+Shift+S
Transfer	Ctrl+T
Whisper	Ctrl+W

Directory Shortcuts

Directory shortcuts work only if you first select a directory entry. Specific directory shortcuts are available only if the directory entry includes the necessary information or if the function is available. For example, the shortcut for dialing an assistant is not available

if the selected directory entry does not have the assistant's number. And if the agent does not have the Change Status Users access control right, change user's status is not available.

Tip: To display a menu that lists these shortcuts, right-click an interaction.

Last Name	First Name	Extension	Department
user19	user19	10019	The second second
iser2		10000	
user20 user21 user22	Available Not Logged On		
	Dial Default Number		Enter
Su 1.	Change user's statue	here :	Ctrl+S
Dial Tr 1	Camp		Ctrl+A
Aus B	Initiate new Chat		Ctrl+Shift+C
0	Properties		Ctrl+Shift+P
	Selected Interaction		

Function	Shortcut
Camp	Ctrl+A
Change user's status	Ctrl+S
<u>Copy</u>	Ctrl+C
Dial Assistant	Ctrl+R
Dial Business Phone	Ctrl+B
Dial Business number 2	Ctrl+U
Dial Default number	Enter
Dial Extension	Ctrl+Shift+X
Dial Fax	Ctrl+F
Dial Home	Ctrl+H
Dial Home 2	Ctrl+O
Dial Mobile Phone	Ctrl+I
Dial Pager	Ctrl+G
Send Email (Business)	Ctrl+E
E-mail message to Home address	Ctrl+L
Initiate new Chat	Ctrl+Shift+C
Properties	Ctrl+Shift+P

Command and menu shortcuts

This table lists Interaction Desktop command and menu shortcuts.

Function	Shortcut
Active camps	Alt+T+A
Change Password	Alt+F+P
Change Station	Alt+F+S
Close (hide) Interaction Desktop	Alt+F4
Close currently selected view	Alt+W+C
Close all views in current workspace	Alt+W+L
Configuration	Alt+O+C
Сору	Ctrl+C
Create a new View	Ctrl+Shift+N
Create a new Workspace	Alt+R+C
Cut	Ctrl+X
Delete	Delete
Delete the current Workspace	Alt+R+D
Dock Navigation Pane in original location	Alt+V+N+N
Edit the current Workspace	Alt+R+E
Exit	Alt+F+X
Full Screen toggle	F11 or Alt+V+U
Hide Navigation Pane automatically if empty	vAlt+V+N+A
Log off	Alt+F+O
Mini Mode toggle	F5
Minimize Navigation Pane	Alt+V+N+M
Paste	Ctrl+V
Reorder Workspaces	Alt+R+R
Response Management	Alt+T+R
Rules	Alt+O+R
Status Bar toggle	Alt+V+S

Time-Off Requests	Alt+Z+O
Toolbar selection	Alt+V+T
Tracker menu	Alt+K
Turn off and hide Navigation Pane	Alt+V+N+O
Workgroup Activation	Alt+O+W

Change Log

The following table lists the changes to this document since Customer Interaction Center version 4.0 product availability.

Date	Change
10-June-2019	Converted to HTML format and added to PureConnect Documentation Library.
11-July-2019	Fixed multiple broken hyperlinks in My Interactions and Other Queue Shortcuts topic and the Directory Shortcuts topic.
14-August-2019	Edited to include information on Accessibility enhancements based on AODA-UK (Accessibility for Ontarians with Disabilities Act) guidelines.