Shadow
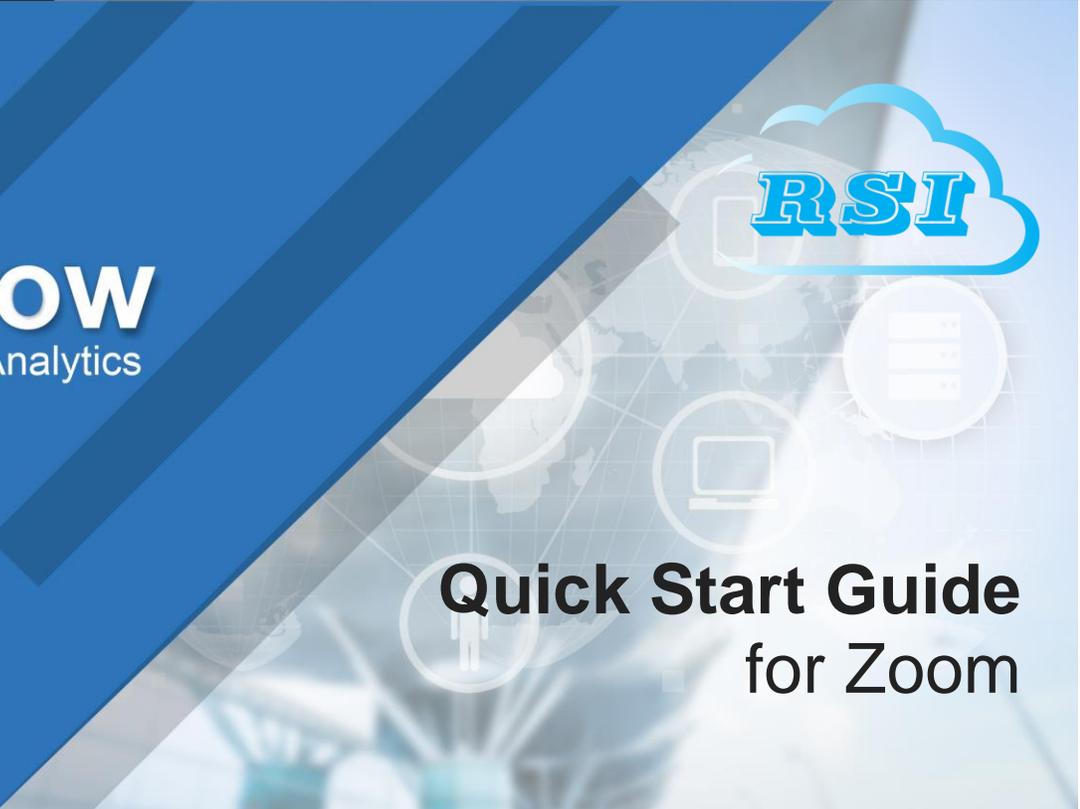### All-In-One Analytics

RSI

Quick Start Guide
for Zoom

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TABLE OF CONTENTS

1.0 Overview

Shadow All-in-One (A1) / Shadow Call Management Software (CMS) by **Resource Software International (RSI)** is the most dynamic, comprehensive and affordable browser based communications management solution available. Shadow A1/CMS can be implemented with any telephone system including key systems, PBX , VOIP / Cloud communication/collaboration systems. Drivers for every telephone system can be selected from our comprehensive library. Additionally, existing drivers can be redesigned or new drivers created to support new telephone systems. Shadow is a comprehensive, flexible, feature rich, call analytics solution with a revolutionary user interface that provides both historical and real-time reporting of your organization's communication/collaboration activity. Features include historical call reporting, cradle to grave reporting, real-time dashboards, service level / emergency call alerts, team collaboration analytics, and QoS Metrics. Features and functionality vary depending on the telephone/collaboration platform. Additional licensing may also be required for some platforms (contact RSI for details). Most environments can install this application on an existing non-dedicated computer. Versions of Shadow are available for the Hospitality, General Business and Professional market place.

Authorized users can access reports at any time through a browser. The Shadow software includes five (5) client licenses providing up to an additional 5 users with simultaneous access to its reports. Additional client licenses can be added to your solution (contact RSI for pricing and licensing details). Shadow's comprehensive costing engine can price calls utilizing most carrier rate plans (i.e. local, intralata, intrastate, interstate, and international tariffs are all supported). Shadow will generate up-to-the-minute information that highlights network traffic, corporate cost allocation (up to 5 levels), account code billing, dialing patterns, misuse and abuse, call center performance, collaboration usage and adoption, etc. Reports can be generated in multiple formats including can be generated in multiple formats including text, spreadsheets, word processors, Adobe PDF and html formats or even emailed. Users can control the content of reports by using the Shadow ad-hoc filter/query tool. Report data can be filtered by date, time, call type, data type, extension, agent, hunt group, queue, account codes, lines, passwords, DNIS, City or State information, etc. Users can customize reports by entering personnel, telephone line and customer information into the applications databases. Alternatively, Shadow can be configured to integrate with Active Directory / LDAP to automatically retrieve personnel information. Alternatively, Shadow can retrieve employee details (name, extension, department, agent/queue information, etc.) directly from many voice/collaboration platforms (contact RSI for details). The Shadow built in job scheduler allows users to schedule common tasks, such as, data collection and report generation. In fact, when configured properly, the job scheduler makes unattended operation of the software a reality.

Shadow can be deployed on premise on a customer provided computer and/or virtualized. Alternatively, Shadow is also available as a hosted service from our RSI Cloud servers.

This document is provided as quick start guide. It includes step by step instructions on how to launch / access Shadow, use the Quick View feature to view calls and playback call recordings, generate your first report, and view the real-time dashboards. For detailed instructions on all of Shadow's features and capabilities please review the Shadow User Guide accessible from the help menu icon on the main screen.

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1.0 Starting / Accessing Shadow

Our Shadow enhanced analytics solution allows users to locate and view call activity, playback call recordings, generate call and/or collaboration reports, view real-time call and/or collaboration metrics and many additional features. Please Consult the Shadow On-Line User Manual for comprehensive details on all of Shadows features and capabilities.

Shadow Cloud customers will be notified by RSI when their Shadow Cloud service is active. Shadow Cloud customers do NOT need to install any software as the solution resides in RSI's Cloud (i.e. in RSI's data center). The Shadow Web Server provides browser access to the Shadow Quick Viewers, Report Generator, Dashboard, Task Scheduler, and many additional features. Please note, the Shadow Web Server must be configured before you can access it from a computer's web browser (contact RSI Support Services for assistance).

You can access Shadow from a compatible internet browser. Please note, the computer / device you are using must be connected to the internet. Use the following steps to access Shadow via your computer's browser.

1. Locate and launch a supported internet browser (i.e. Internet Explorer, Mozilla firefox, Google Chrome, Safari, etc.)

2. **Shadow Cloud** customers will be provided with a public URL/IP Address. For example, access our Shadow for Zoom test environment by using the URL https://zoomlab.rsicloud.com/. Please contact RSI Support Services if you have not received your Shadow Cloud public URL/IP address or require assistance.

3. Enter the Shadow Web Server IP Address (URL or computer name) into the Browser URL path and then press the enter key. After pressing the enter key the **Shadow Login** screen will be presented.
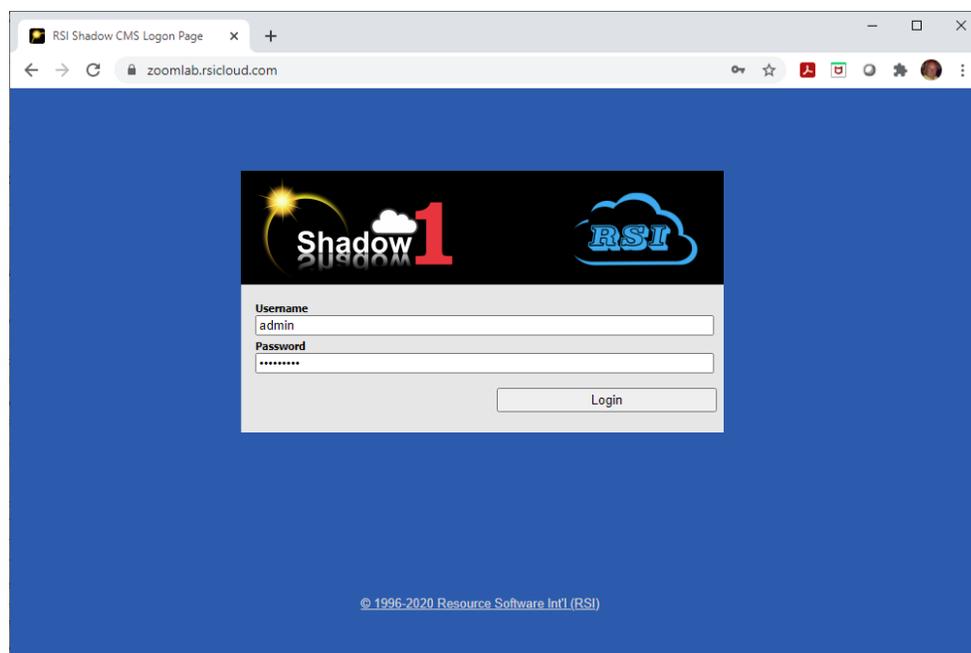
Enter your Shadow user account information (username and password) into the corresponding boxes and press the **Login** button (see Managing Shadow User Accounts in the [Shadow On-Line Manual](#) for additional details). The default administrator **username** for our Zoom test environment **admin.** The default admin account password is also **Z0oMlab3!** (please note passwords are case sensitive). You can obtain your Shadow user account information from your Shadow administrator. Shadow Cloud customers can obtain their user account information by contact RSI Support Services (see [RSI Support Services](#)).

4. The Shadow main window should now be visible within your browser.
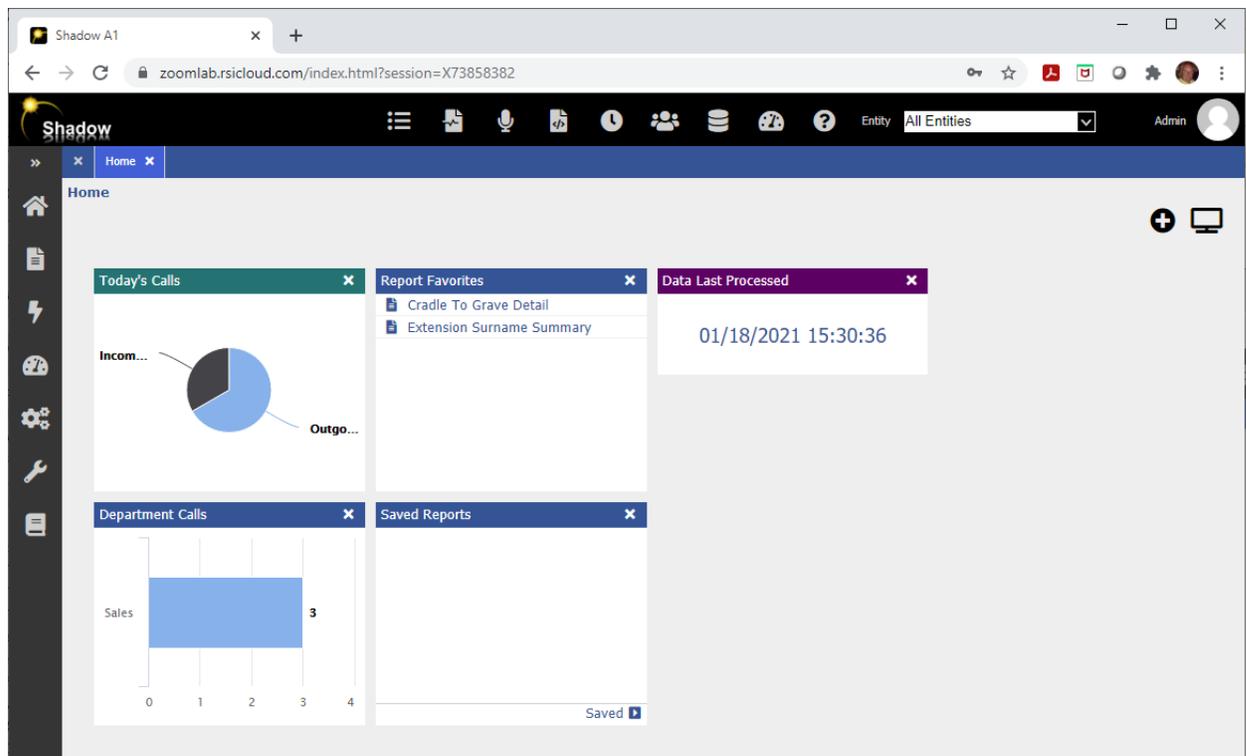
You have now successfully connected to the Shadow web module and can now begin using the software. The Shadow web module main window consists of four distinct sections. They are as follows:

1. The Toolbar
2. The Navigation Menu
3. The Work Area

The following sections provides detailed instructions on how to utilize the above three areas.

1.2 The Toolbar

The Shadow Toolbar provides you with a short cut to commonly used Shadow Web Module tools or function. Using the Shadow toolbar can save you both keystrokes/mouse clicks and time. The Shadow Toolbar is pictured below.

We have pre-configured the Shadow toolbar with commonly used tools/functions. For example, to access the **Calls Database Table** using the Navigation menu you can click **Quick Views** ⚡ menu icon, then select the **Calls Detail** sub-menu item. By using the toolbar you can access the Calls Database in a single step by simply clicking the **Calls Detail** ▤ toolbar button (**Calls Detail).** The following table identifies each tool bar button and its corresponding function.

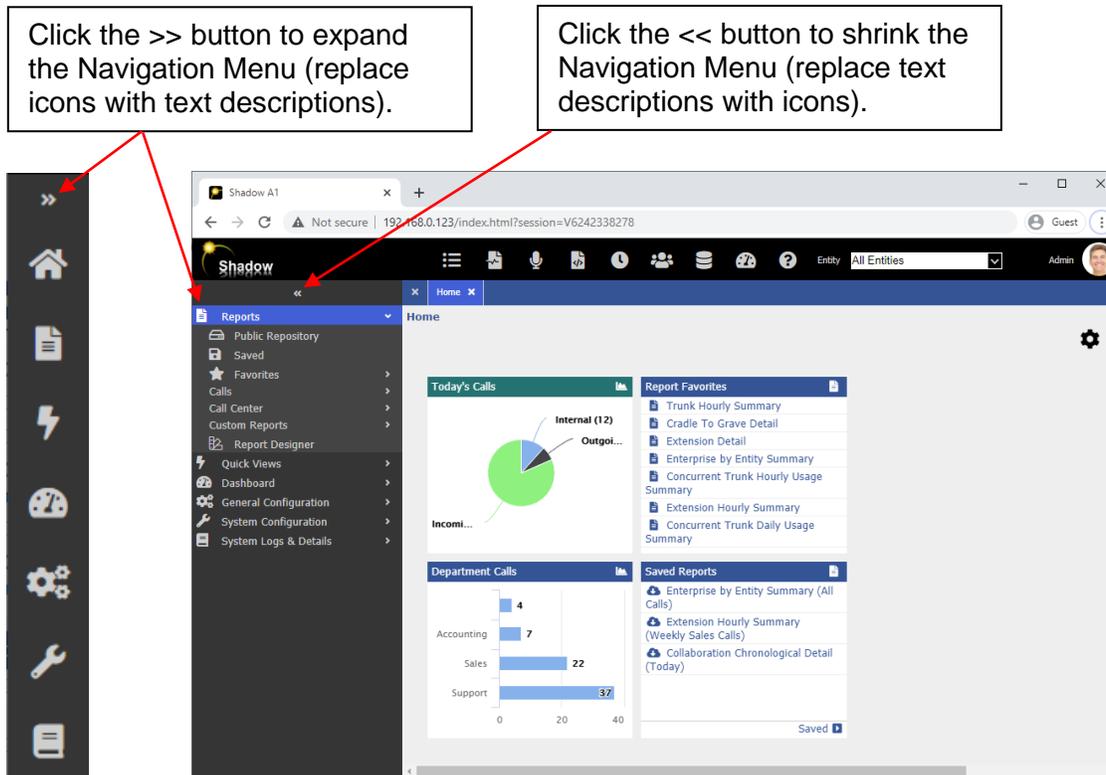| Button	Description
▤	Shortcut to the Calls Database viewer.
📄	Shortcut to the Cradle to Grave viewer.
🎤	Shortcut to the Call Recording Playback feature (not available with all telephone platforms).
🗔	Shortcut to the Custom Report Designer.
🕐	Shortcut to Shadow Report/Task Scheduler.
👥	Shortcut to the Personnel Database Viewer/Editor.
🗄	Shortcut to Database Maintenance Tool (only available to users with administrator privileges).
🕛	Shortcut to Historical / Real-Time Dashboard (additional licensing requires with some platforms).
❓	Shortcut to About box, RSI Remote Support Tool software download, and help file(s).
Admin 👤	Identifies the current user logged in to Shadow. Click this button to logout.

Use the ⌗ Entity All Entities ☑ tool bar button to select a specific site/location. This feature is only applicable to customers with a multi-site Shadow license (additional licensing is required – contact RSI for details). Selecting this button applies a global data filter to the current Shadow session. If a site is selected, then reports generated by the user will only include data from the selected site. An example of the sites available in our Shadow Zoom test environment is shown below.
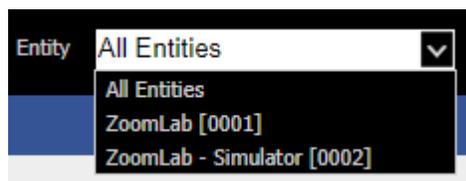
Set Entity drop down box to **ZoomLab [0001]** to view data from our Zoom Test account (ideal to confirm Shadow can capture data from a live Zoom system). Alternatively, set the Entity drop down box to **ZoomLab – Simulator [0002]** to view simulated zoom data (ideal for testing with a larger dataset).

1.3 The Navigation Menu

The Shadow Navigation Menu is located on the left hand side of the browser window. The Navigation Menu provides you access to all features / tools your Shadow user account is authorized to access. The Shadow Navigation is pictured below.

Click the >> button to expand the Navigation Menu (replace icons with text descriptions).

Click the << button to shrink the Navigation Menu (replace text descriptions with icons).

The Navigation menu contains **menus** and **sub menus.** Menu items followed by a greater than (>) sign indicate additional sub-menu items are available. Click the greater than (>) sign to expand and contract the selected **items** sub-menu items. For example, the **Reports** menu bar (shown expanded above) contains all the Reports Groups available to the current user. Please note, only one menu bar can be open (visible) at a time. You can select and open a different menu item by clicking on it.

Click the desired menu bar and nodes/sub nodes to access, view and execute the Shadow tools/functions available to the user. Select and access a different menu node or item's tool/function by simply clicking it. When a node's contents are expanded additional scroll buttons will be displayed if more nodes and items exist than can be displayed within the Navigation Menu.

The Shadow modules, features and functions available to you will vary depending on your Shadow licensing and your user account privileges / roles. For example, the Shadow Administration can restrict which reports, dashboard widgets and administration functions are available to each User Account. Please contact your Shadow Administrator if you require access to a feature, report or dashboard that is either missing or unavailable. Information on each of the Shadow modules tools/functions available via the Navigation menu system can be found in the Shadow On-Line Manual.

1.4 The Work Area

The Shadow Work Area is usually the largest area in the browser's window. This large area by default contains **Home View**. The Home View displays summary data for the current day (Today's Calls and Department Calls) and Report Favourites and Saved Reports. when the software is started (is white).
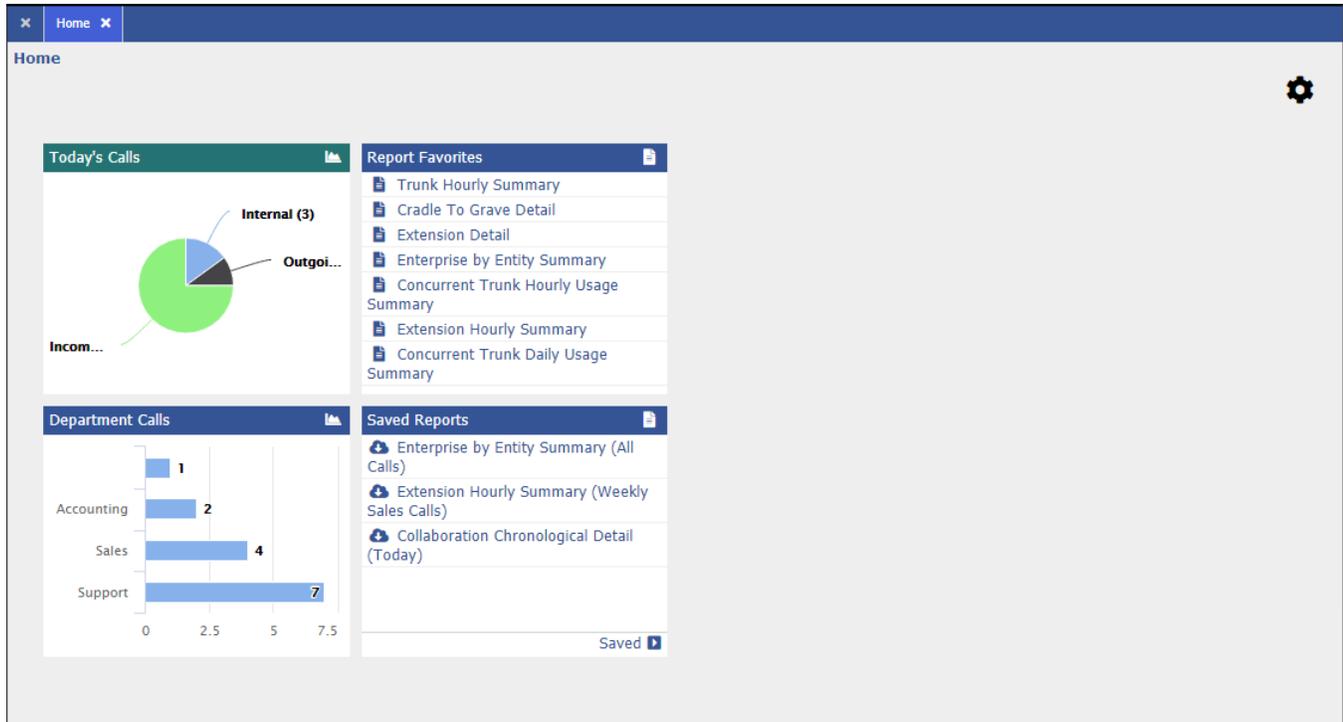

The blue bar at the top of this area shows each Shadow module/feature that is currently open / available to view. For example, the above blue box shows the (Home X) tab. This is the Home view. Each time you select/activate a Shadow Web Module tool/function via the browser from the navigation menu or tool bar, a new tab (view) will appear within this area. For example, if you activate the Calls Database Table tool (i.e. press the Calls Detail tool bar button) the Calls Database Table will be displayed within the work area. Additionally, all report generation, dashboards, quick views, general configuration changes, system configuration changes, database maintenance, task scheduling, system logs & details, etc. will be performed and displayed on a unique tab within this work area. You can close a tab/view by clicking the X to the right of the tab's name.

The Shadow user interface allows you to customize the main window to better meet your needs. For example, you can increase or reduce the size of the work area by adjusting the width of the Navigation Menu (i.e. position your mouse on the right edge of the Navigation menu and the sizing mouse icon will appear) or your browser window.

1.5 Accessing the On-Line Manual (Help File)

Shadow contains a comprehensive on-line manual/help file (i.e. this document). Consult this file for details on how to use this solution. This manual/help file contains easy to follow instructions on how to configure the Shadow Web Server, create Report Filters, generate Reports, configure/view the Dashboard, configure the Task Scheduler, perform Database Maintenance functions and also how to trouble shoot problems encountered while using this software. Use the following steps to access and utilize the Shadow On-Line Manual (Help File).

1. Access Shadow from any computer on your network via its browser (see <u>Accessing Shadow from your Browser</u>).
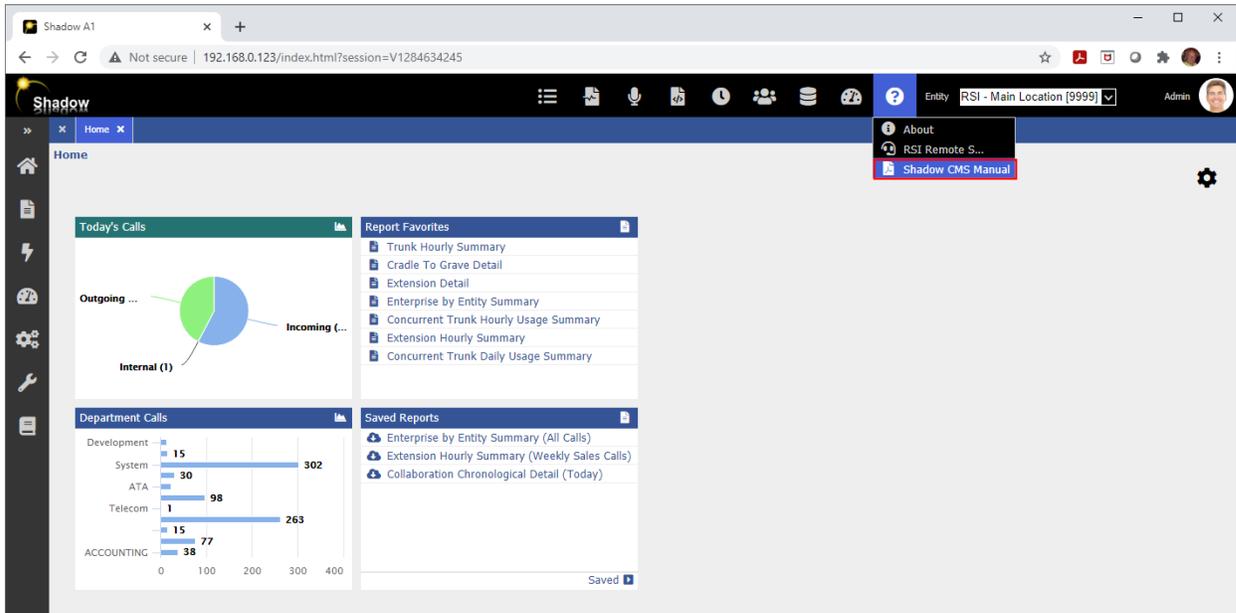
2. Click the **Help** 🔘 button located on the Shadow tool bar to display the help menu. Next, select the **Shadow User Guide/Manual** menu item (circled in red above). The user manual / help file should now be visible. Scroll down to the Table of Contents to locate and select the topic of interest to you.
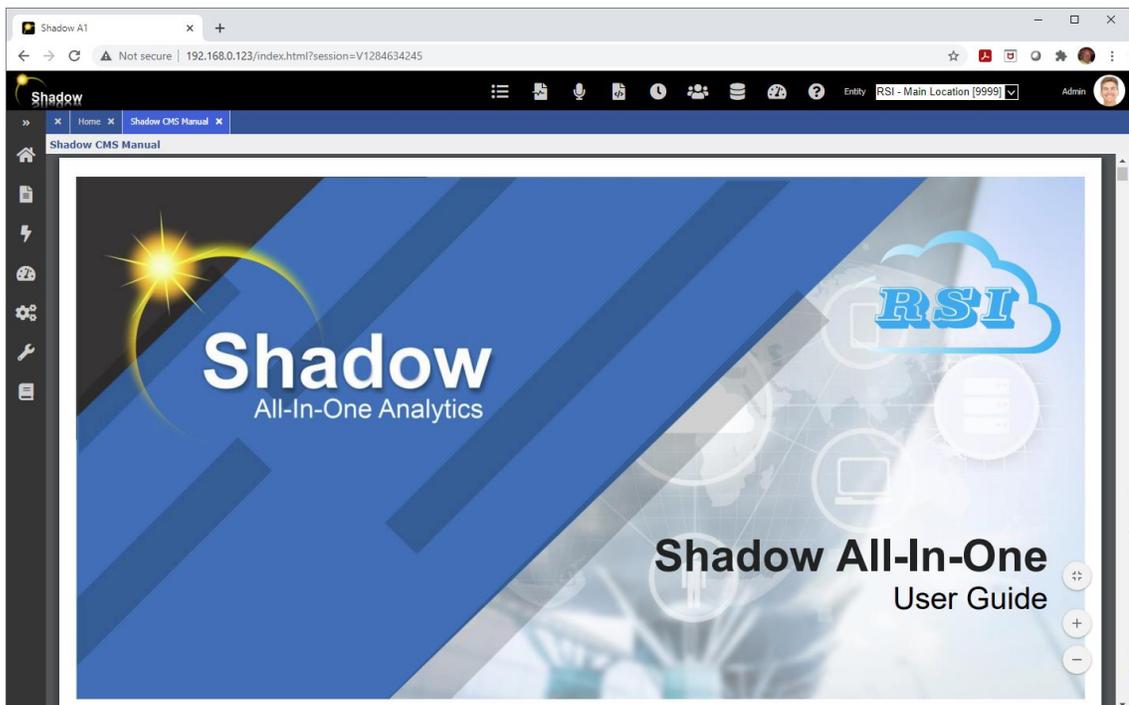

Please note Adobe Acrobat reader may be required to access the on-line user's guide. A copy of Adobe Acrobat Reader can be downloaded from Adobe's web site at <u>www.adobe.com</u>.

2.0 Finding and Viewing Calls

The Shadow Quick View feature can be utilized to view your organization's most recent call activity. Alternatively, its built-in search feature can be utilized to locate and display past call activity based on a user specified search criteria. For example, users can utilize the search feature to locate and view call activity for a user specified date / time range, calls made or received by a specific extension, agent, or queue, and/or calls based on their duration. Please note, the call data presented in this view will vary depending on the capabilities of your telephone system / collaboration platform and the data it generates (i.e. some platforms do not generate detailed agent and queue metrics).

Use the following steps to access and utilize the Shadow Quick View feature.

1. Access the Shadow from any computer on your network via its browser (see Accessing Shadow from your Browser).

2. Click and expand the **Quick Views** ⚡ menu bar icon (circled in **red**) in the **Navigation Menu** (left side of screen).

3. Click the **Cradle To Grave** menu item (circled in **green**). Please note, this item is only visible to users with Quick View privileges (see Managing Shadow User Accounts in the Shadow On-Line Manual for more details). Alternatively, click the Dashboard icon (circled in **orange**) on the Shadow main tool bar.
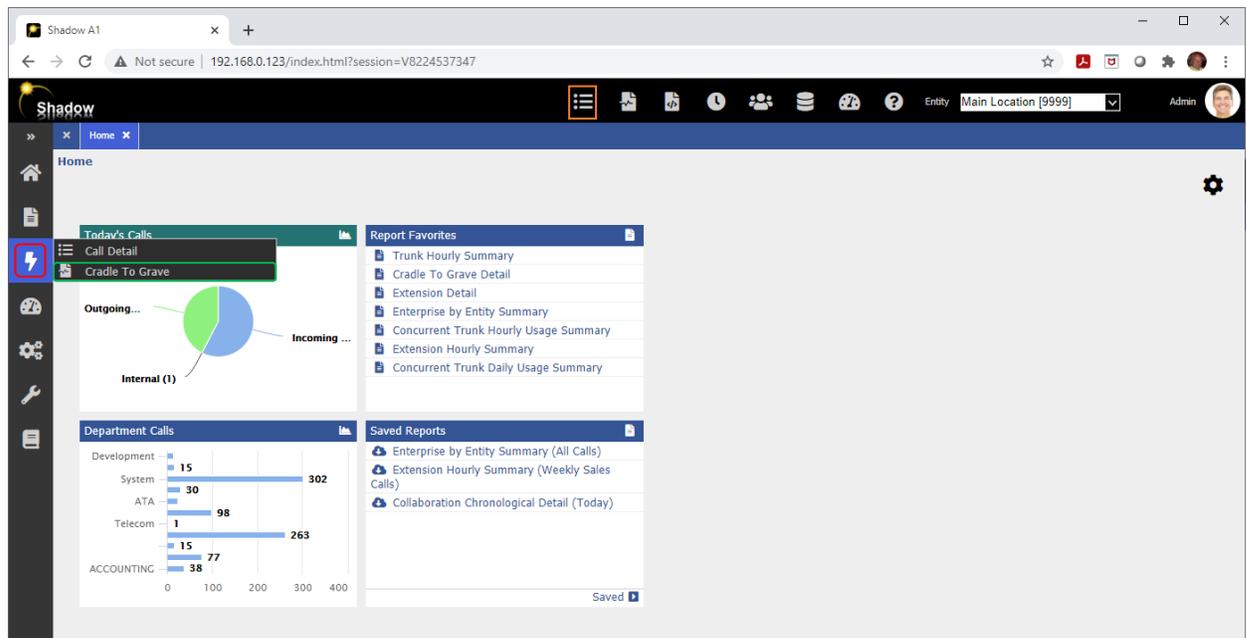
3. The Cradle to Grave Viewer should now be visible within your browser.
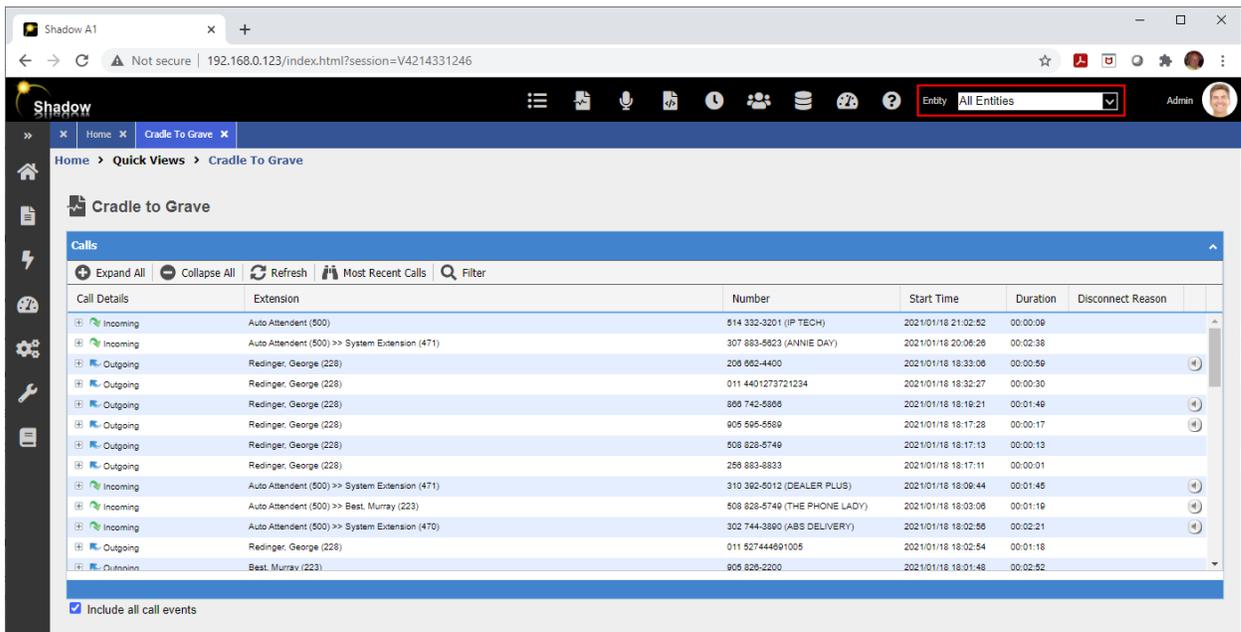
The viewer displays the most recent call data captured by Shadow from your telephone system. Use your mobile device or extension to make a test call to your organization's main number. If you have an IVR or auto attendant chose a menu item that transfers you to another extension. Terminate the call shortly after it has been answered (i.e. please make sure you are connected for at least 5-10 seconds). The recently completed call should appear within the Cradle to Grave Viewer. Please note, depending on your phone system and how Shadow has been configured to capture your call data the call may take several minutes or longer to appear. However, for most systems Shadow should display the new call within a few seconds. Please make sure the **Entity** drop down option (circled above in red) is set to either **ZoomLab [0001]** or **All Entities** (otherwise the new call may not appear in the viewer).

Click the plus sign (+) on any call appearing in this window to view its cradle to grave details (i.e. display every endpoint involved in the call from its beginning until its end).
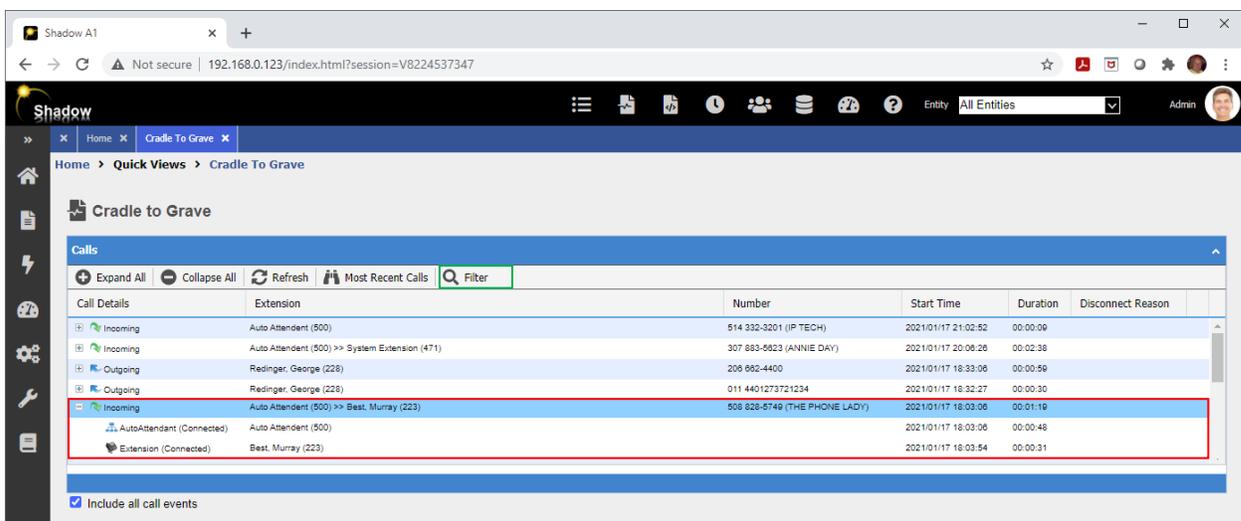
The above example shows an inbound call from 508-828-5749 received on January 17 at 6:03 pm. The call was 1 minute in 19 seconds in duration. The caller spent 48 seconds navigating and listening to the Auto Attendant greeting and menu options before being transferred to Murray Best (extension 223). The call ended after speaking with Murray for 31 seconds.

4. Press the **Filter** 🔍 Filter button (circled in green above) to search for calls using a user specified search criteria. The **Quick Filter** dialog should now be displayed within your browser.
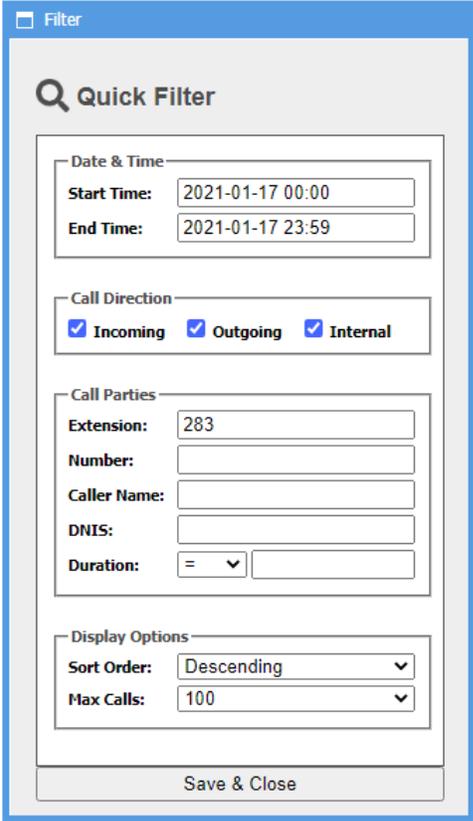
Use the Date & Time **Start Time** and **End Time** options to specify the date range of the calls you wish to view within the Cradle to Grave Viewer.

Use the **Extension** option to include only calls to or from a specific extension. The above example illustrates how to locate a call to or from extension 283.

Use the **Number** option to include calls to or from a specific phone number. For example, to locate calls to or from the phone number 905-576-4575 enter 9055764575 into this box.

Use the **Caller Name** option to include calls with the Caller Name specified in this box. Please note the Caller Name must match exactly. Additionally, Caller Name is not available on all calls or with all phone systems (contact RSI Support Services for details).

Use the **DNIS** option to include calls with the DNIS specified in this box. Please note you will only be able to search by DNIS if the DNIS service has been activated by your carrier and DNIS data is generated by your phone system (contact RSI Support Services for details).

Use the **Duration** option to include calls with duration equal to (=), less than (<), less than or equal to (<=), greater than (>), or greater than or equal to (>=) the value specified in the box to the right of the operator.

5. Press the **Save & Close** button to perform your search. Calls matching the specified search criteria will now be visible within the Cradle to Grave Viewer.
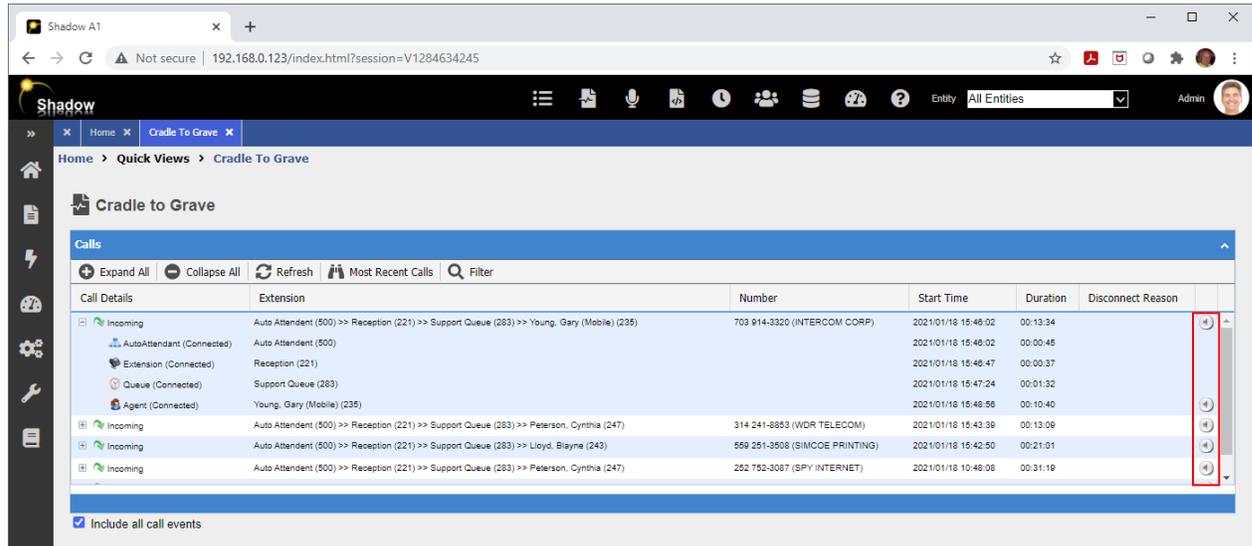
In the above example we have clicked and expanded the first call matching the search criteria specified in step 4 above. The expanded call information details the call being answered by the auto attendant, then transferred to reception where they spoke to the caller from 45 seconds. The receptionist subsequently transferred the call to the Support Queue. The call waited in the Support Queue for 1 minute and 32 seconds until it was answered by the Agent (Gary Young). The agent spoke to the caller for 10 minutes and 40 seconds.

Calls with a speaker ◀ icon (located on the far-right side of call data – circled in red) indicate a recording of the call is available for playback. Click the speaker to play the call recording (a headset and / or speaker is required). Please note the availability of the call recording playback feature will vary depending on type of telephone system your organization is utilizing and if they have purchased our call recording playback feature.

6. Repeat steps 4 and 5 to search for additional calls.

You have now successfully utilized the Shadow Quick View feature to search and display calls matching your search criteria. Click the [x] on the right of corner of the Cradle to Grave tab to close the Quick View feature.

3.0 Generating My First Report

Shadow contains a comprehensive set of reports users can utilize to create a detailed picture of their organization's telephone and collaboration activities. These reports can only be generated after successfully configuring the Shadow to capture and translate call metrics (CDR/SMDR, Call Center, Traffic, etc.) from their organization's telephone systems or Collaboration Platforms. Customer's utilizing the Shadow to price call records must also have Shadow's pricing engine properly configured. Finally, many reports (i.e. Extension Reports) contents are dependent upon users providing additional information in other Shadow databases (i.e. Personnel Database, Trunk Group Database, Account Code Database, Comment Database, DNIS Group Database, etc.). Consult the Shadow On-Line Manual (see Accessing the On-Line Manual (Help File)) for details on how to configure Shadow to capture call and collaboration data, configure its pricing engine and / or populating the aforementioned database tables.

Shadow provides numerous categories of management reporting. The reports available within your Shadow environment will vary depending on the telephone / collaboration platform you are utilizing and which Shadow modules/licenses have been purchased. Use the following steps to view the reports currently licensed within your Shadow environment.

1. Access Shadow from any computer on your network via its browser (see Accessing Shadow from your Browser).

2. Click the **Reports** menu icon 📄 located in the **Navigation Menu** (left side of screen circled in red).
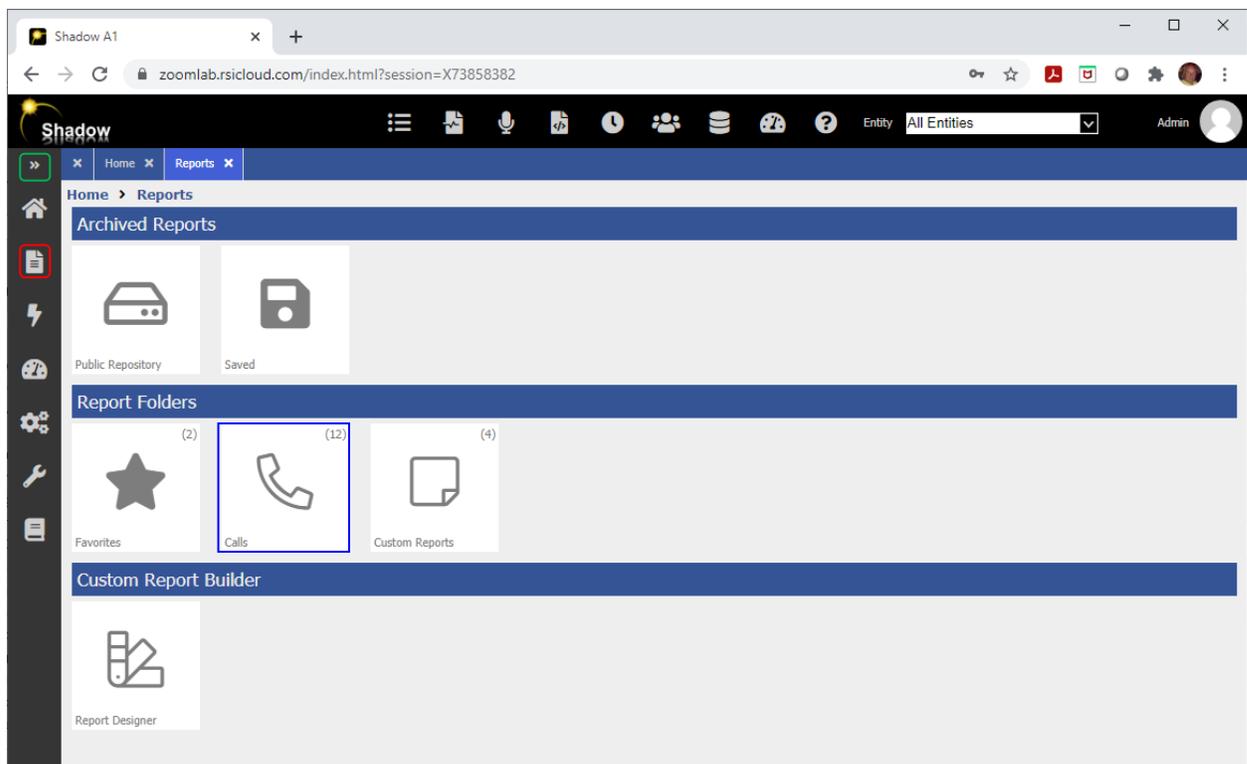
Select the desired report category (i.e. Calls) from the Report Forlders section (circled in blue). Alternatively click the >> button (circled in green above) expand the Navigation Menu.
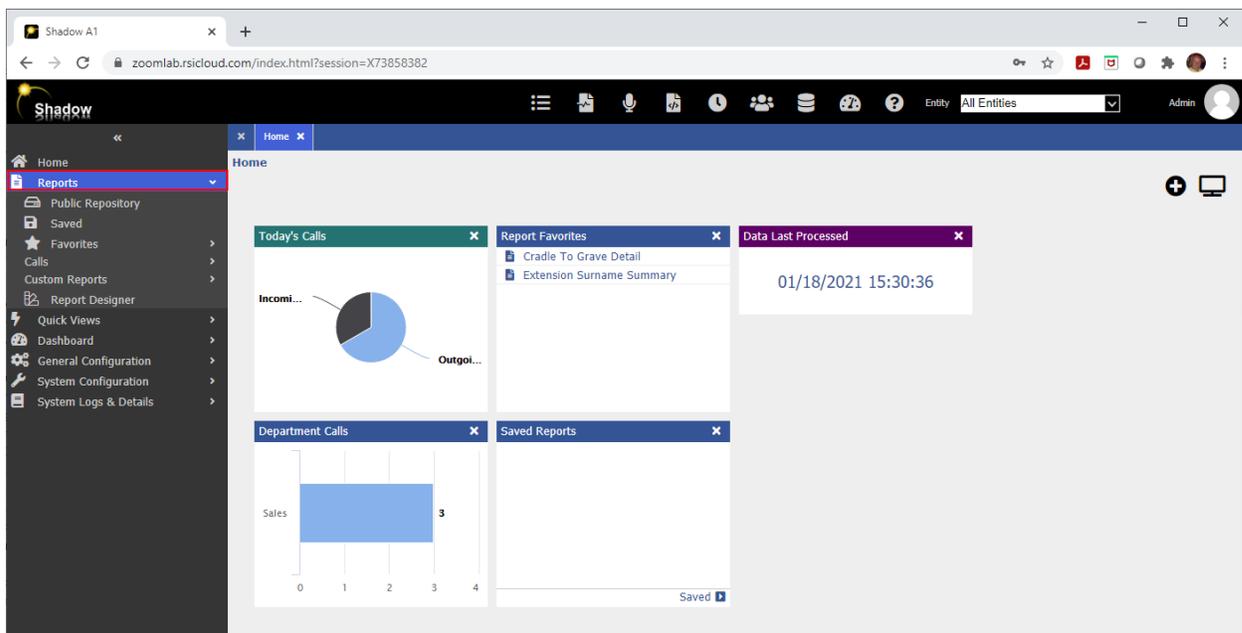
After expanding the Navigation menu, click the **Reports** (circled in red) menu item to reveal the available report categories.

NOTE: The list of available report categories will vary depending on either your telephone system / collaboration platform and / or the Shadow Reporting modules your organization has purchased (contact **RSI Support Services** for details).

3. Locate and select the report you wish to generate by clicking and expanding any of the report group items (i.e. if you selected the Calls report category then the Extension, Authorization, Account Code, Trunk, etc. report groups will be available to you). For example, to generate an Extension Detail report click and expand the **Calls** menu (circled in red below) option and then click and expand the **Extension** sub menu (circled in green below) option. Finally select the **Extension Detail** (highlighted in orange). The Report Options tool should now be visible in the work area (see The Shadow Web Work Area) of the Shadow browser window.

You have now successfully selected a report to generate. The following section details how to generate an Extension Detail Report from the Calls report category.

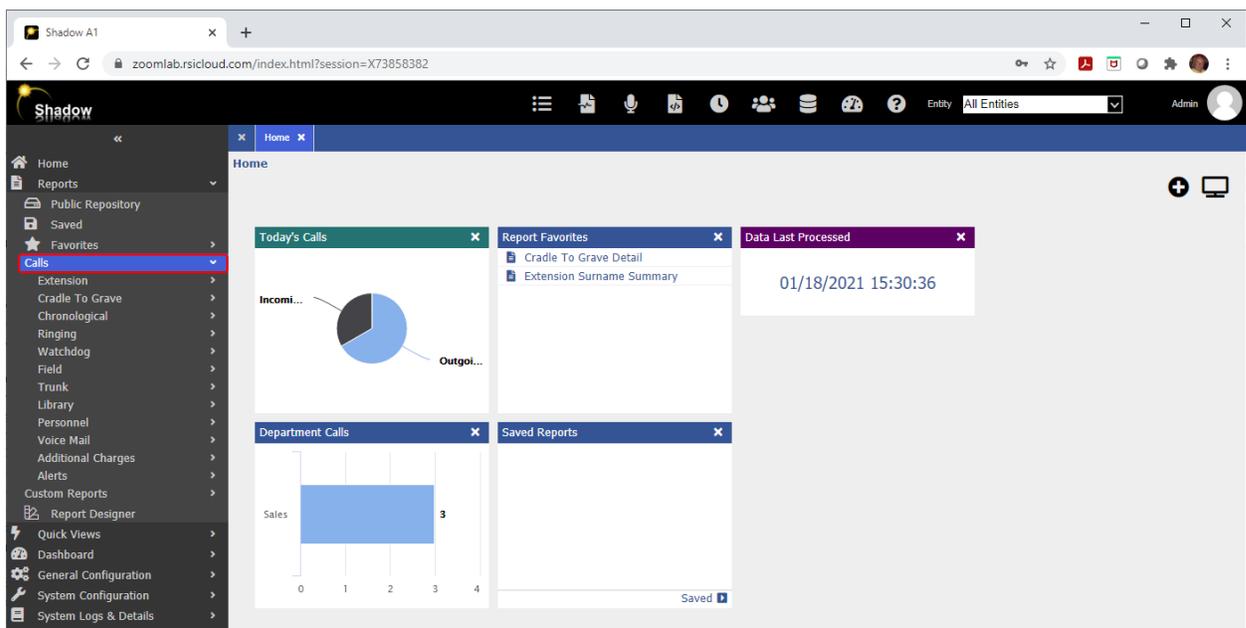## 3.1 Generating an Extension Detail Report

Shadow Calls Reports provide both detail and summary analysis of CDR/SMDR or call event data collected from your organization's telephone system(s). These reports are commonly referred to as call accounting or call management reports. Please note a Shadow site license is required for each telephone system being monitored (contact RSI Support Services for details).

The Calls Reports are grouped by common characteristics. For example, Extension reports (i.e. Extension Detail, Extension Summary, Department by Extension, etc.) are created using a telephone call's originating or terminating extension and its corresponding personnel information (i.e. personnel database). Whereas, Trunk reports (i.e. Trunk Detail, Trunk List Summary, Trunk Group Summary, Trunk Hourly Summary, All Trunks Busy Detail, Ring Time Summary, etc.) are based on the trunk/line utilized during the telephone call. Each Report group can be found in the **Reports/Calls Reports** sub

menu of the **Shadow Navigation** menu. If the report you require is not available through the Calls Reports you may be able to create it using the Shadow Custom Reports feature (see the Shadow On-Line Manual). Alternatively, RSI Professional Services are available to design and create custom reports for you. Please contact your authorized RSI distributor or RSI Support Services for details.

Use the following steps to generate a Shadow Extension Detail Report.

1. Access Shadow from any computer on your network via its browser (see Accessing Shadow from your Browser).

2. Click the **Reports** menu bar located in the **Navigation Menu** (left side of screen circled in red).


3. Locate and select the report you wish to generate by clicking and expanding any of the report group items (i.e. Extension, Authorization, Account Code, Trunk, etc.) in the **Calls** menu. For example, to generate an Extension Detail report click and expand the **Calls** menu (circled in red below) option and then click and expand the **Extension** sub menu (circled in green below) option. Finally select the **Extension Detail** (highlighted in orange). The Report Options tool should now be visible in the work area (see The Shadow Web Work Area) of the Shadow browser window.
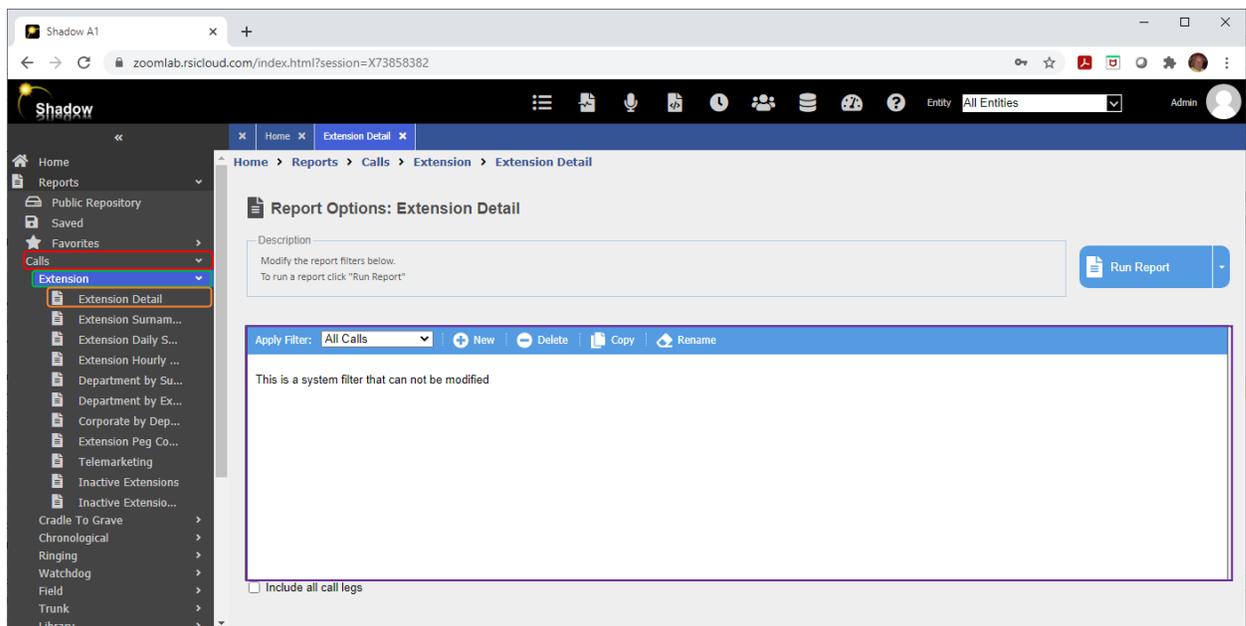
4. Use the Report **Filter** options (circled in purple above) to select and/or create a filter to use with your report. A filter allows the user to select which calls will be included in the report (i.e. call from last week, calls from last month, calls made/received by employees in the sales department, etc.).
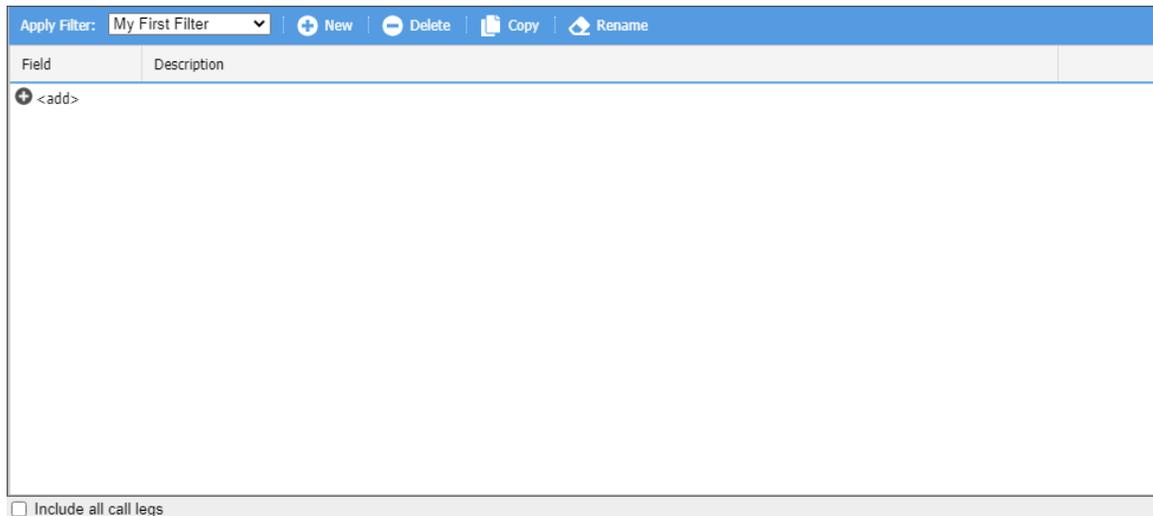
    Use the **Apply Filter** drop down list box to select the existing filter you wish to modify. Alternatively, you can create a new filter by pressing the ⊕ New button. After pressing the **New** button, you will be prompted to enter the name of the filter you are creating.
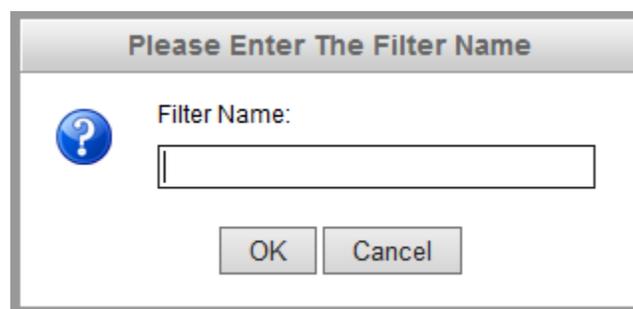
Filters are user specific and are stored in the Shadow database. We recommend you specify a filter name which easily idenitfies what the filter does. For example, if you are creating a filter to view all calls from the sales department use the name **Sales Department**. If you are creating a filter to report on all calls over 30 minutes name the filter **Calls Greater Than 30 Minutes**.

Please note system filters cannot be modified. These are global filters applicable to all users that are included by default with the Shadow software. However, you can create as many new filters as you like.

For our example, we will create a new filter named "My First Filter". Type "My First Filter" into the filter name box. Next press the **OK** button. The filter tab should now display the My First Filter settings.

The **Apply Filter** drop down list box should now contain the name of the filter you specified in step 3 (i.e. 'My First Filter'). The filter dialog tab contains several buttons and a work area. You can use the buttons to create another new filter, delete the current filter, copy the current filter and/or rename the current filter. The filter work area contains a table with two columns (Field and Description). Each row you add to this filter table window allows you to set different filter options (i.e. Date/Time, Cost, Call Type, Duration, Digits, Personnel, Account, Line/Trunk, Field, and Expression). The rows included in this work area will be used to create your filter criteria (i.e select which records will be included in the report/database operation).

5. Add a new item to a filter by pressing the ⊕ <add> button. The filter items menu should now appear below the Field column.
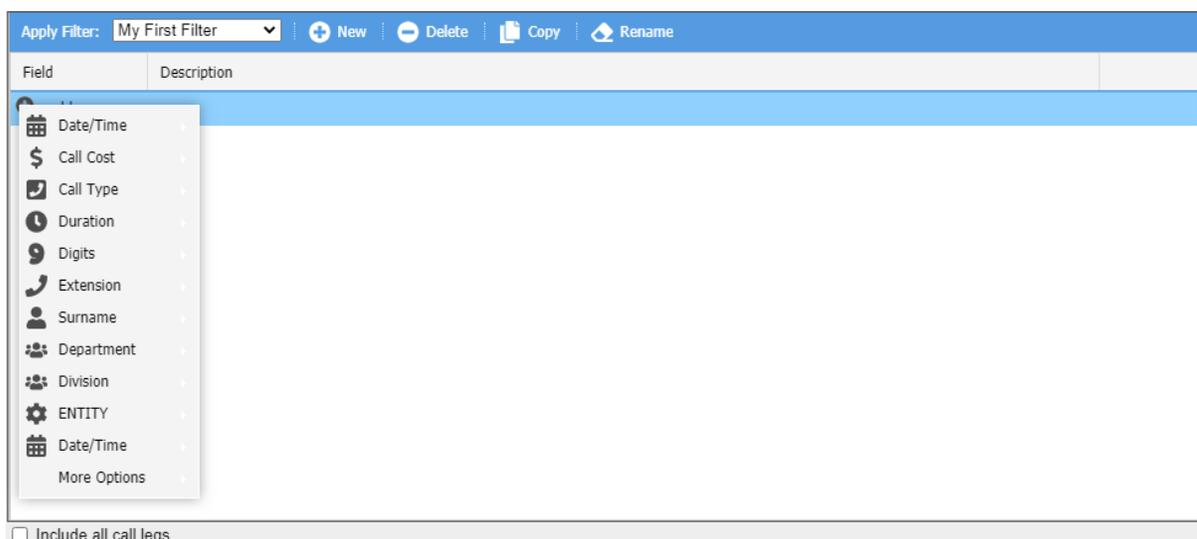
Click the item you wish to add to your filter by clicking it. If an arrow appears to the right of the item a submenu containing possible filter values will be displayed. Click the filter value you wish to add to your filter. For example, if you click the Date/Time filter item then the submenu will contain Today, Yesterday, This Week, Last Week, Last X Days, This Month, Last Month, Previous X Months, Year to Date, Last Year, Date Range, Date/Time Range, or Day of Week.

Selecting the Yesterday option will instruct Shadow to include call records from only yesterday in your report. Please note, yesterday is based on your current computer date (i.e. if today is May 5th then yesterday will include May 4th calls in your report. After selecting the desired submenu item a filter option dialog box will be displayed. The following depicts the dialog displayed with the Date/Time Yesterday filter option is selected.
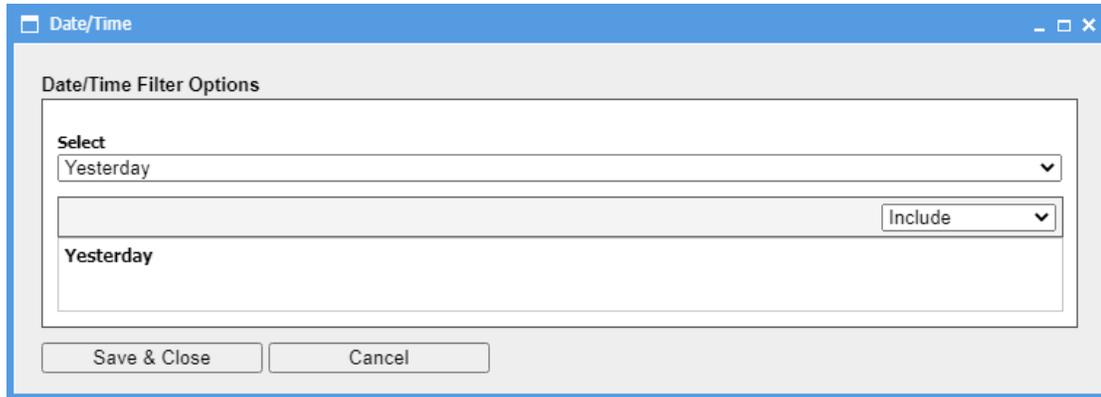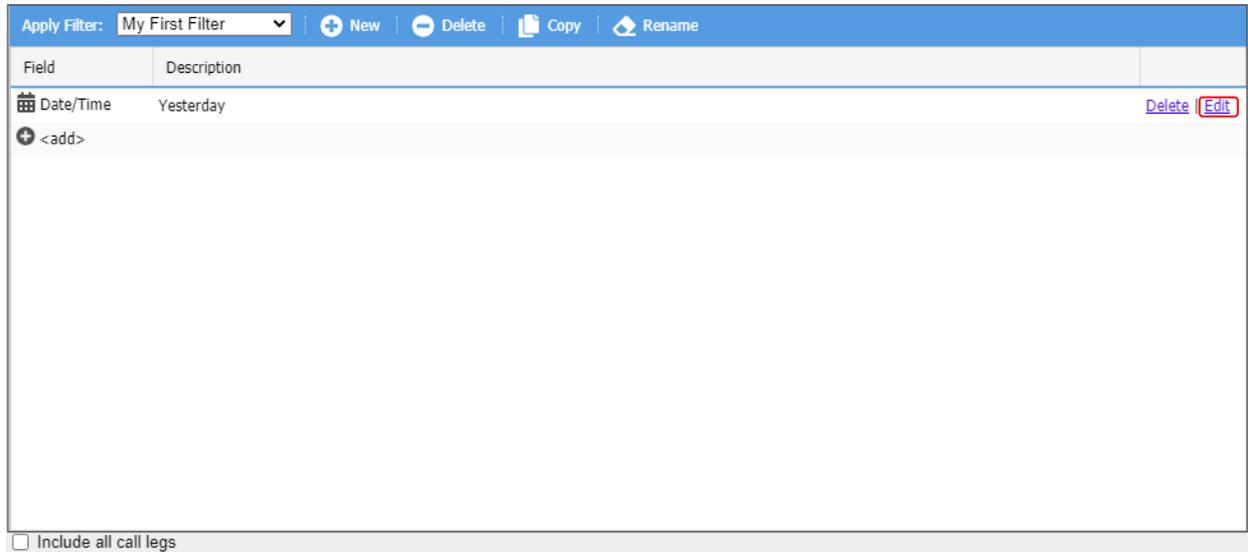

Use the **Date/Time Filter Options** dialog box to specify the filter criteria. You can change the date/time filter option you selected (i.e. Yesterday) by clicking the **Select** drop down box. Use the **Include / Exclude** drop down box to specify if the report is to include or exclude the calls identified by the Select option.

Press the **Save & Close** button to add the new filter criteria to the 'My First Filter'.
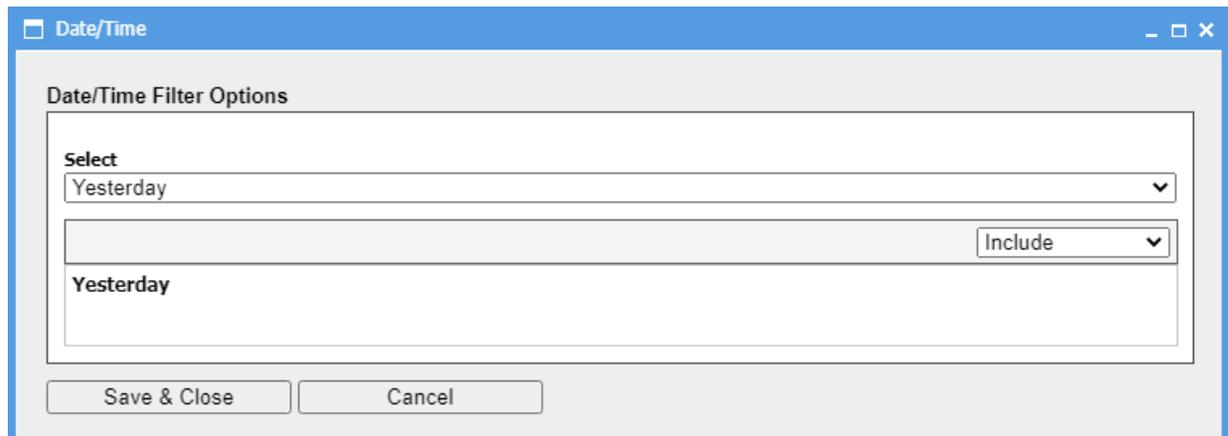
The new **Date/Time** filter item should now be added to the filter. The following image depicts the newly added **Date/Time** filter option set to the **Yesterday** option.
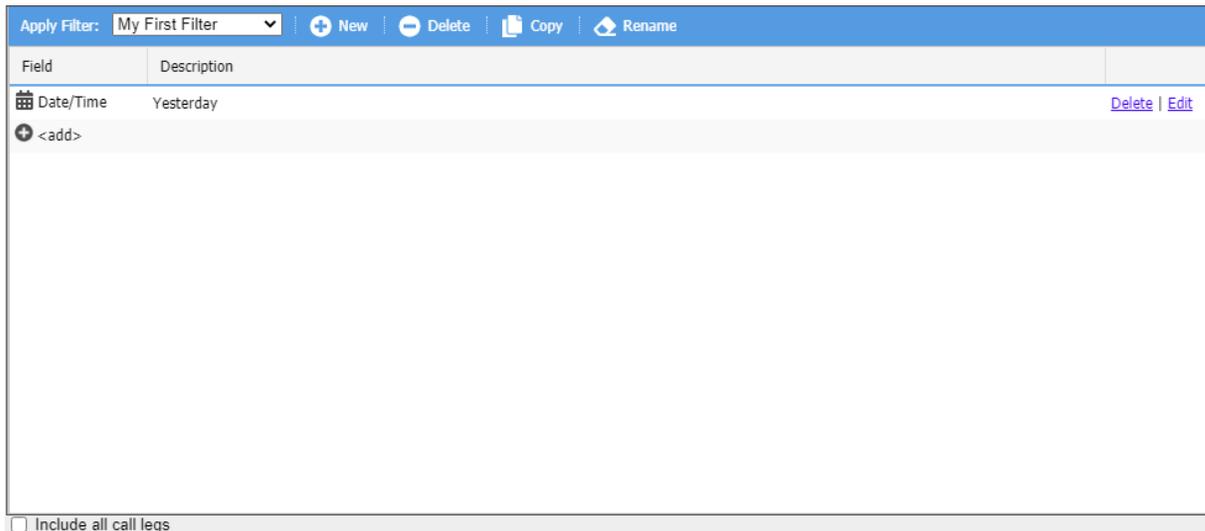
6. Modify a filter item by clicking the desired item's corresponding **Edit** button (circled in red below).


The filter option dialog box should now be displayed on within the browser.


Change the existing date/time filter option you previously selected (i.e. Yesterday) by clicking the **Select** drop down box and choosing a new item (i.e. Today). Use the **Include / Exclude** drop down box to specify if the report is to include or exclude the calls identified by the Select option.

7. Delete a filter item by clicking the desired item's corresponding **Delete** button (circled in red below).
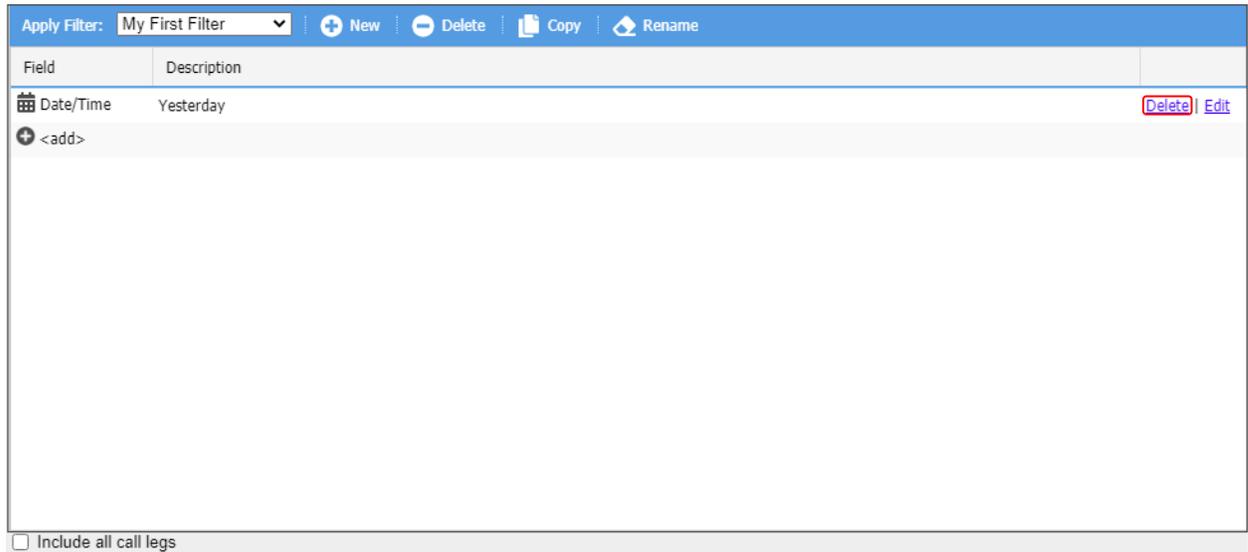

A prompt requesting you to confirm your deletion request will be displayed.
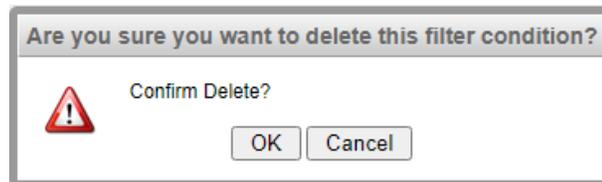
Click the **OK** button to delete the filter item. Alternatively, press the **Cancel** button to abort the delete operation.

8. Repeat steps 5, 6 and 7 above until your Filter completely specifies which call records you wish to included in your report. For our example, the **My First Filter** includes only the **Date** filter item configured to limit the report to only include calls from Today (see below).
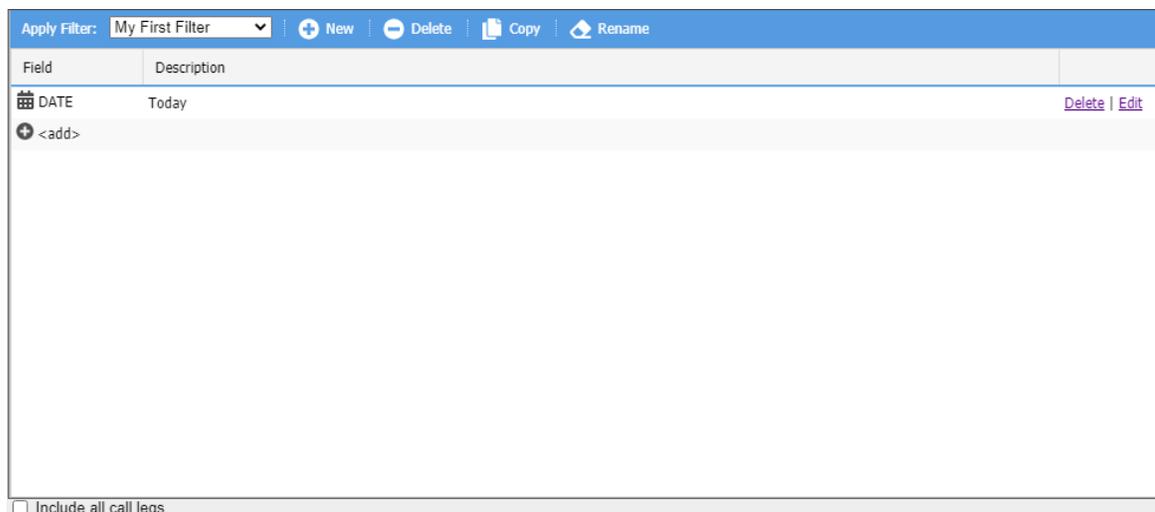
If you require additional information on how to create, modify and delete filters please consult the Shadow On-Line Manual or contact RSI Support Services.

Generate the report using the selected filter by pressing the **Run Report** [Run Report] button. Alternatively, exist the report generation tool (i.e. current report options window) by pressing the [x] on the Extension Report tab (located below the main tool bar on the top of the window). Note you can also close all tabs by pressing the [x] located on the far left corner of the blue tab bar.

9. Press the **Run Report** button [Run Report] to generate your report. The Shadow report will be generated and displayed within the Shadow default report viewer. Please note the default viewer is the Shadow Standard Report Viewer. Shadow can also be configured to display the report in a PDF viewer (for details on how to select the Default Report Viewer please consult the Shadow On-Line Manual. Skip ahead to Step 11 for details on how to generate the report to a PDF viewer or the Report Repository.

10. The Extension Detail Report should now be displayed in the Default Report Viewer.
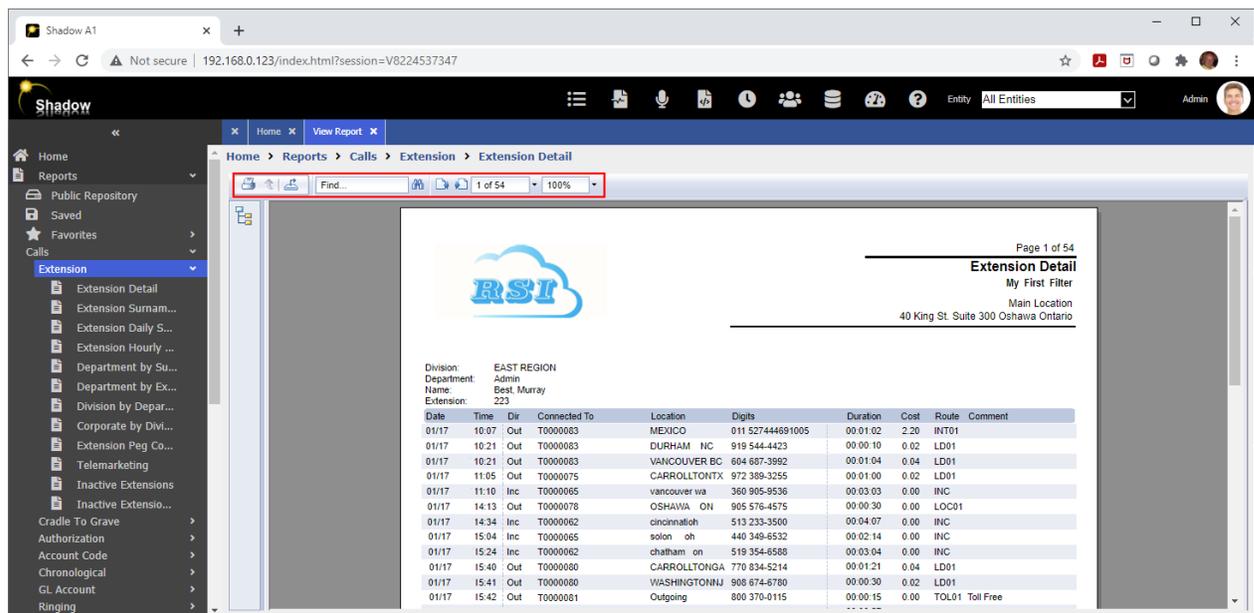
Please note the report will NOT contain any calls if the filter you utilized selected calls that do NOT exist in your database (i.e. your filter included a date / time period during which Shadow was not operating or did not capture any call data). If this occurs please return to step 2 above and re-generate the report using either a different filter or modify your filter's call selection criteria.

Use the icons on the Report Viewer tool bar (circled in red) to print the report, export the report to other formats (word, excel, CSV, RTF, etc.), search for text within the report, page forward and backwards thru the report, and/or zoom in. Please see the What Can I Do In A Report Window? Section of this guide for a detailed description on how to use these features.

The next steps detail how to examine a report if it was generated to a PDF viewer or the Shadow Report Repository. Please skip ahead to step 12.

11. Press the arrow located on the right side of the Run Report [Run Report] button to specify where the report output will be sent.
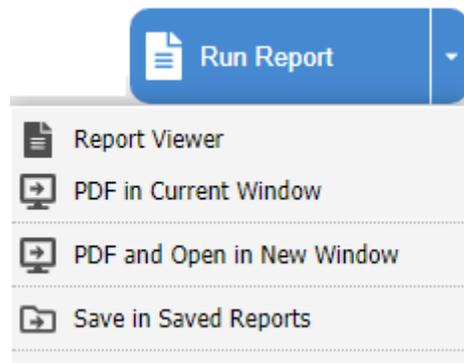
Select the **Report Viewer** option to generate the report to your browser window using the Shadow Standard Report Viewer (see step 10 above).

Select the **PDF in Current Window** option to create the report in PDF format within current Shadow browser window.

Select the **PDF and Open in New Window** option to create the report on a separate browser tab. Please note, you will only be able to access the report within this new tab. It will not contain the Shadow CMS Web User Interface. Access the Shadow CMS Web Interface by clicking the corresponding Shadow CMS browser tab.

Select the **Save in Saved Reports** option to instruct Shadow to generate the report in the background and save it in the report repository when it's completed. If the report can be completed quickly a tab with the selected report name displaying the Saved Reports list will be displayed within your browser (pictured below). Alternatively, a message will be displayed on your screen when the report is completed. You can then click the **Saved Reports** menu item in the **Reports** navigation menu to view your report (see Using the Report Repository in the [Shadow On-Line Manual](#) for additional details).

Click the "**Extension Summary (This Month)"** report link to display the PDF report in a new tab. Press the Download ☁ icon to download the PDF from the Shadow server to your computer. Press the Delete ⊖ icon to remove the report from the Save Report Repository. For additional details on the Shadow Report Repository see Using the Report Repository in the Shadow On-Line Manual for additional details.

12. You have now successfully generated a Shadow Calls Report. Click the [x] to the right of the report tab name to close the report.

The above steps can be utilized to generate any of the Reports available within Shadow. Consult the Shadow On-Line Manual for details on how to generate additional Shadow Reports.

3.2 What Can I Do In A Report Window?

The Shadow Report Generator creates a report using the settings you specified. Report results can be previewed using two different viewers: Standard Report Viewer and a PDF Viewer. Please note only a single Standard Report Viewer tab can be opened at one time. The next time you launch a report the existing Standard Report Viewer tab will be closed and replaced with a new Standard Report Viewer tab. However, if you are using a PDF Viewer then a new tab will be created for each report you generate (i.e. you will be able to have multiple PDF report viewer tabs opened simultaneously). By default, Shadow utilizes it's built in standard report viewer. Utilizing a PDF viewer may require the user to install a 3rd Party PDF browser add-on (i.e. Adobe Acrobat Reader, etc) supported by your internet browser. After installing the third party browser PDF viewer the user can either select which viewer to utilize during report generation or change the default viewer utilized by Shadow (see Selecting the Default Report Viewer). The following details how to utilize the Shadow Standard Report Viewer to view, print, search and export your report results. For details on how to utilize a 3rd Party PDF browser viewer, please consult the manufacturer's documentation.

The Shadow Standard Report viewer displays a report's results in a Preview window during report generation. An example of this preview window is pictured below.

Use the Report preview window to view, scroll and search your report, print your report, and export it to other applications/formats (i.e. PDF, email, MS Word, MS Excel, Text, etc.). The Report Preview window can contain up to three different components. They are as follows:

1. The report preview window tool bar.
2. The report preview window tree view (side bar)
3. The report preview window workspace.

3.2.1 The Report Preview Window Toolbar

The Report Preview Window Toolbar contains short cuts to various report preview options and tools. Using this toolbar can also save you both keystrokes/mouse clicks and time. The Report Preview Toolbar is pictured below.

Position your mouse pointer over each toolbar button for a few seconds and a hint, describing its operation, will appear. The following table provides a description of each toolbar button.

Button	Description
	Press this button to print the contents of the report preview window.
	Press this button to drill back up if you have previously drilled down in an existing report. Please note this option is only available on reports with drill down capabilities (i.e. typically the ability to click on a report summary line item to view the details associated with the summary information).
	Press this button to export the report to other applications (i.e. PDF, email, MS Word/Excel).
Find...	Press the binoculars to search the report for the text entered into the box to the left.
	Press this button to go to the previous page of a report.
	Press this button to go to the next page of a report.
2 of 839 / Go to First Page / Go to Last Page	Pressing the drop down arrow to the right of the page numbers will display a pop-up menu you can utilized to go to either the first or last page of a report. Alternatively click inside the box and type the page number of the page you wish to navigate to.
100%	Use this box to zoom in or out on the contents of the report preview window's workspace. Press the drop down arrow to the right of this box to select 25%, 50%, 75%, 100%, 125%, 150%, 200%, 300% or 400%. Alternatively click inside the box and specify the magnification percentage you wish to utilize.
	Press this button to show the report group tree (i.e. sidebar located on left hand side or screen).
Group Tree «	Press the arrows to the right of the "Group Tree" text to hide the group tree view.

The report preview window toolbar also contains status information such as the current page number of the report you are viewing and the total number of pages in the report.

### 3.2.2 The Report Preview Window Group Tree

The Report Preview Window Group Tree (or sidebar) is located on the left-hand side of the report window. Please note, not all reports contain a group tree view. For example, a chronological report does not contain a tree view.

When the preview window's tree view is visible, use it to quickly navigate through a report to locate specific information. For example, the Extension Detail report contains a tree view. The tree view in this report illustrates the current entity's organization structure. Traverse through the tree to find a specific division, then department and finally a specific employee. Please note the number of organizational levels displayed within this tree view is based on the entity's organizational structure (see Customizing the Personnel Database).

Hide a report's group tree (or side bar) by pressing the arrows to the right of the "Group Tree". Press the tree view button again to re-display the group tree.

3.2.3 The Report Preview Window Workspace

The Report Preview Window Workspace contains your report results. Only records satisfying the filter you selected (see Filters) from the Report Generator screen will be displayed in this window. While the report is being generated this window will remain blank and display a "Loading" status message.
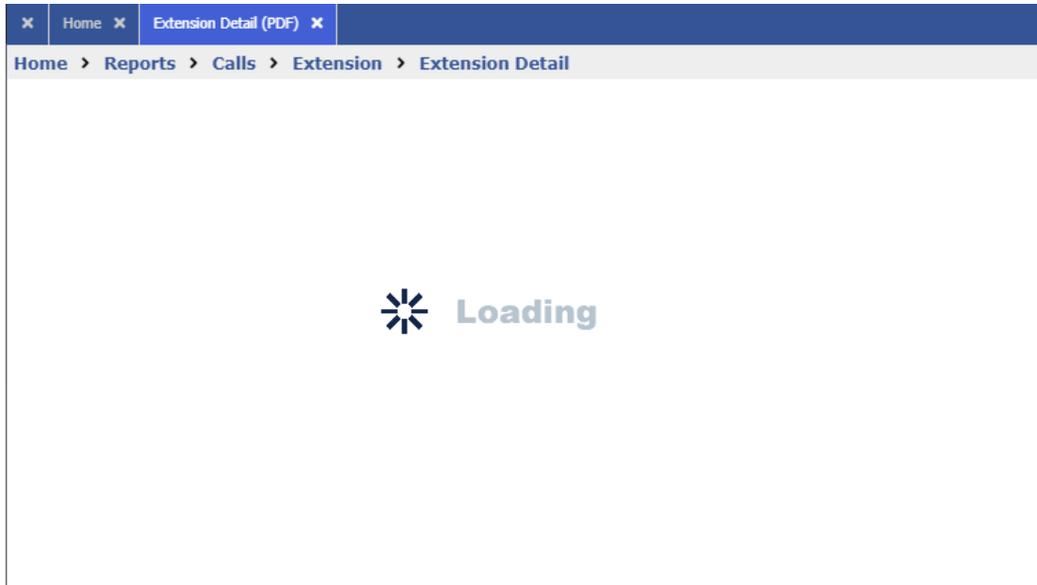
The report process will be completed once all pages have been added to the report. The workspace will now display the first page of the report.
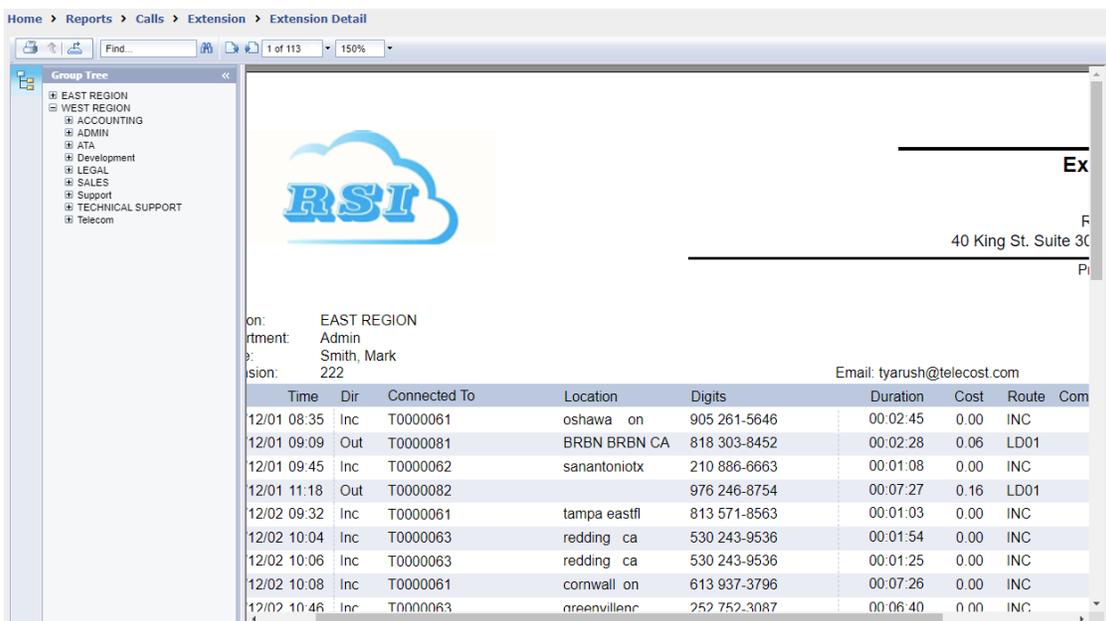
Please note, Shadow automatically identifies reports which will take a long to process and generate. These reports will not be displayed in a Report Viewer window. Instead they will be saved to the Report Repository. For details on how to access these reports via the Report Repository see Using the Report Repository section of this guide.

Aborting a Report

A report can be aborted at any during report generation. Press the small [x] located tab beside a report's name to abort it. The following example highlights how to abort an Extension Detail report during report generation.

Please note a report will be immediately terminated as soon as you press the [x].

Examining a Report

Press the toolbar's first page, previous page , next page and last page buttons to navigate through a report (see The Report Preview Window Toolbar). Additionally, you can use the workspaces vertical and horizontal scroll bars or the keyboard's cursor keys to move the current page up, down, left and right.

Zoom In/Zoom Out

Use the toolbar's Zoom In/Out percentage indicator to enlarge or shrink the contents of the workspace. Depending on your computer's screen size a value of 100% to 150% usually provides the best results.

Searching for Specific Report Details

Use the toolbar's search for text tool to examine a report for specific information. For example, the workspace currently contains an extension detail report for approximately 1000 extensions (i.e. report is over 1000 pages long). Using the next and previous page button to find Extension 2355 calls (i.e. John Smith's calls) could prove to be time consuming if not impossible. If you know the division and/or department name Mr. Smith is assigned to, you could use the group tree to find his calls (see The Report Preview Window Group Tree). An easier solution would be to simply type "Smith, John" into the toolbar's search text tool. Next, press the search button (i.e. binoculars). The software will automatically search the entire workspace for the text you entered and display the first match it finds.
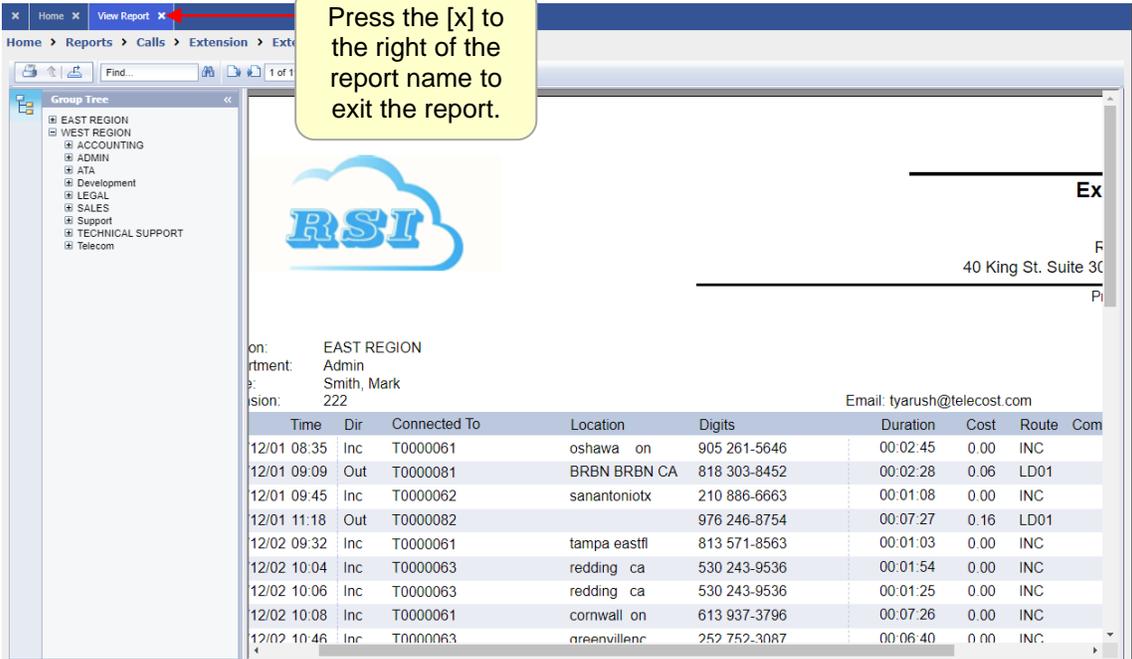
Printing a Report

Print the contents of the workspace by pressing the toolbar's print button 🖨️.

Exporting a Report to Other Applications

Press the preview window's export toolbar button 📤 to export the report contained in the workspace to other applications. This tool can export the report to the following formats: Adobe Acrobat (i.e. pdf file format), CSV file, Excel, HTML, Lotus 1-2-3, ODBC compliant database, text file, Rich Text, MS Word, etc.). The exported file can be stored on your hard drive or emailed to another party.

Exiting the Report Preview Window

Press the small [x] located tab beside a report's name to exit it. The following example highlights how to close an Extension Detail report during the report generation.

4.0 Dashboards

Shadow can be configured to display both historical and real-time metrics for your organizations current call activity and / or collaboration activity within a user defined Dashboard. Each metric or group of metrics is referred to as a dashboard widget. A widget can contain historical data, real time data or both historical and real-time data. A Shadow user can create one or more Dashboards each containing one or more dashboard widgets. Available dashboards widgets include real-time extension / agent metrics (i.e. on a call, Available (logged in), Idle (logged out or not on a call), Do Not Disturb (DND), etc.), Queue metrics (calls answered, abandoned calls, overflow calls, calls sent to voicemail, wait time, talk time, etc.), Collaboration metrics (i.e. meeting activity, messaging (voicemails, faxes, IM/chats, team room activity), QoS (Packet Loss, Jitter, MOS Scores), etc. Please note, the dashboard widgets available to your organization will vary depending on the type of phone system / collaboration system your organization is utilizing. Historical dashboard widgets are available with all telephone / collaboration systems. Whereas real-time widgets are only available with telephone / collaboration platforms that generate real-time data streams. Additional licensing may be required from either RSI and/or your platform provider to activate the Shadow Dashboard feature for specific telephone systems / collaboration platforms. For example, additional licensing is required for Avaya IP Office, Avaya Communication Manager, Cisco Unified Contact Center Express, Mitel MiVoice Office/Business/Connect, and others (contact RSI Support Services for details).

Shadow Users who wish to create Dashboards must have the **Is Dashboard User** privilege activated on their account. A user with Dashboard user privileges will only be able to view/display dashboard widgets (historical and real-time metrics) they have been granted access to by a Dashboard Administrator. Only Shadow Users with **Super Admin** privileges can grant the **Is Dashboard User** and **Is Dashboard Admin** privilege to a Shadow User Account. For additional information on granting Shadow User privileges please see Managing Shadow Users Accounts. Contact your Dashboard Administrator to have additional widgets added to your Shadow user account. For information on how to create, modify, delete or provide access to widgets please see the Dashboard Widget Management in the Shadow On-Line Manual.

## 4.1 Viewing the Shadow Dashboards

Dashboard Users can view their dashboards via the Shadow Dashboard tool. Using this tool a dashboard user can create their own dashboards, modify their existing dashboards (i.e. add, delete, and / or modify widgets), and or delete their dashboards. The following sections provide detailed instruction on how to use the Shadow Dashboard tool. Please note, based on the configuration of your Shadow environment and your licensing some of the dashboards / widgets detailed below may or may not be available (contact RSI Support Services for details).

Use the following steps to access your Dashboard.

1. Access the Shadow from any computer on your network via its browser (see#1.1 Accessing Shadow from your Browser).

2. Click and expand the **Dashboard** menu bar located in the **Navigation Menu** (left side of screen).

3. Click the **Dashboard** menu item (circled in **red**). Please note, this item is only visible to users with Dashboard User privileges (see Managing Shadow User Accounts in the Shadow On-Line Manual). Alternatively, click the Dashboard icon (circled in **green**) on the Shadow main tool bar.
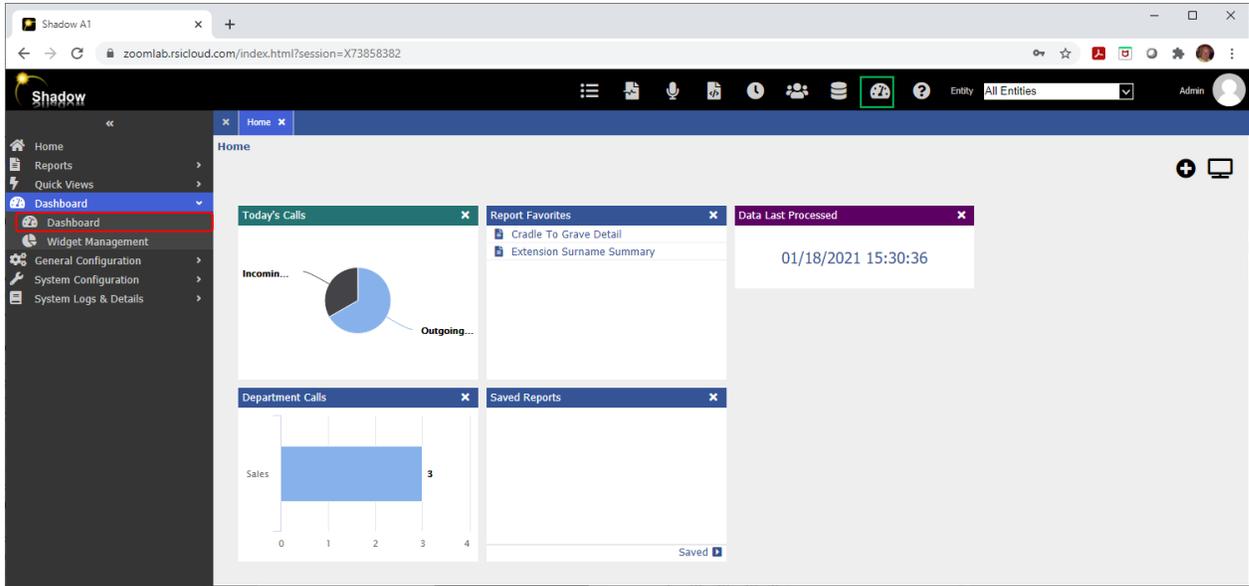
4. After clicking either of the Dashboard items circled above your Dashboard will be displayed within your browser.
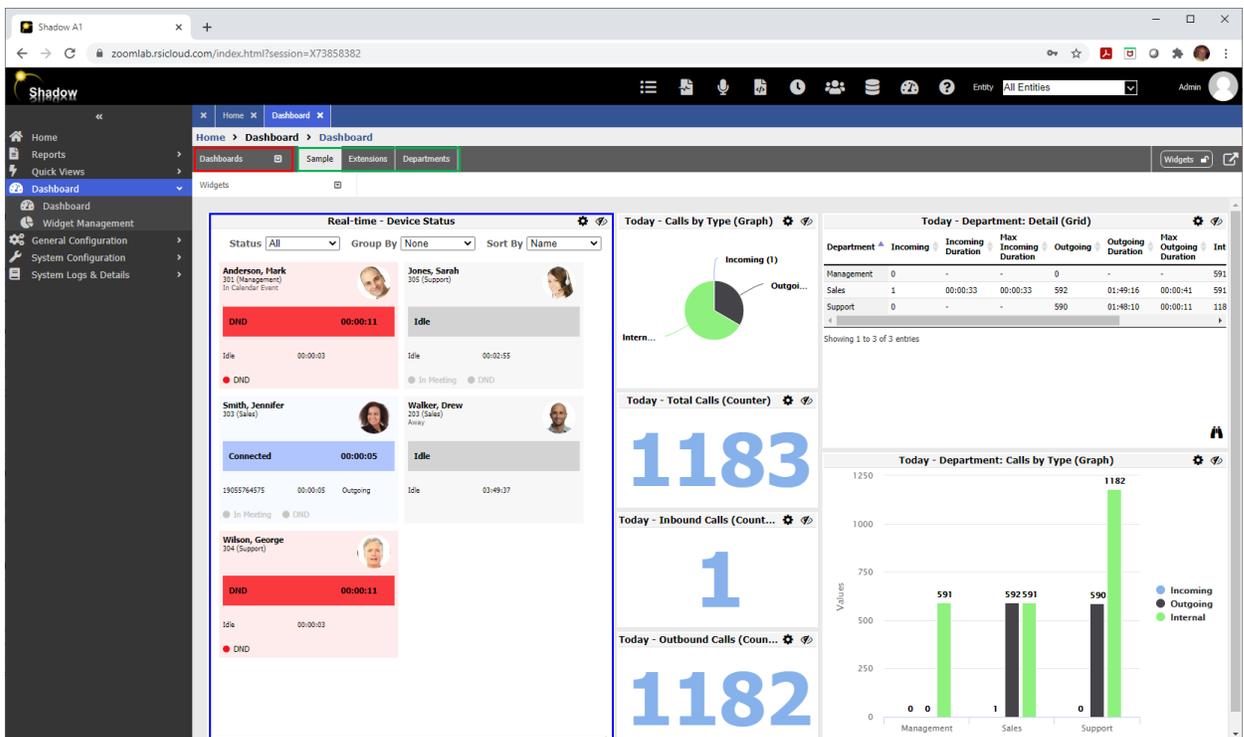
The above example shows a Shadow User's dashboard that has already been configured. Users create their own dashboards. As a result, your dashboard may not look the same as the one pictured above. Additionally, a user can create mulitiple dashboards each with their own set of widgets. For example, the above screen has three (3) unique dashboards named Sample, Extensions, and Departments). Access each dashboard by clicking on its name / tab (circled in green).

Each dashboard contains one or more widgets. A widget a group of one or more related metrics (i.e. Device Status, Calls by Type, Calls by Department, Call Counters, etc). In the above example depicts we are currently viewing the Sample dashboard which contains 7 widgets. Each widget is contained with in a separate box and usually has a title. For example, the Device Status widget (circled in blue) displays both real-time status metrics for each device/extensions. Looking at a specific device/extension within this widget (i.e. Smith, Jennifer) you will notice it is currently on an Outgoing call to 19055764575. Please note, the data being presented in the dashboard is real-time and as a result is constantly being updated.

You have now successfully access your user dashboards. Please review the Modify a Dashboard section below for details on how to move widgets, resize widgets, change a widget's appearance, add widgets, and delete widgets within a dashboard. Additional details on how to create a new dashboard and delete a dashboard can be found in the Shadow On-Line Manual.

4.2 Modifying a Dashboard

Shadow can be configured to display both historical and real-time metrics for your organizations current call activity and / or collaboration activity within a user defined Dashboard. Each metric or group of metrics is referred to as a dashboard widget. A widget can contain historical data, real time data or both historical and real-time data. A Shadow user can create one or more Dashboards each containing one or more dashboard widgets.

Use the following steps to modify an existing Dashboard.

1. Access Shadow from any computer on your network via its browser (see Accessing Shadow from your Browser).

2. Click and expand the **Dashboard** menu bar located in the **Navigation Menu** (left side of screen).

3. Click the **Dashboard** menu item (circled in **red**). Please note, this item is only visible to users with Dashboard User privileges (see Managing Shadow User Accounts).
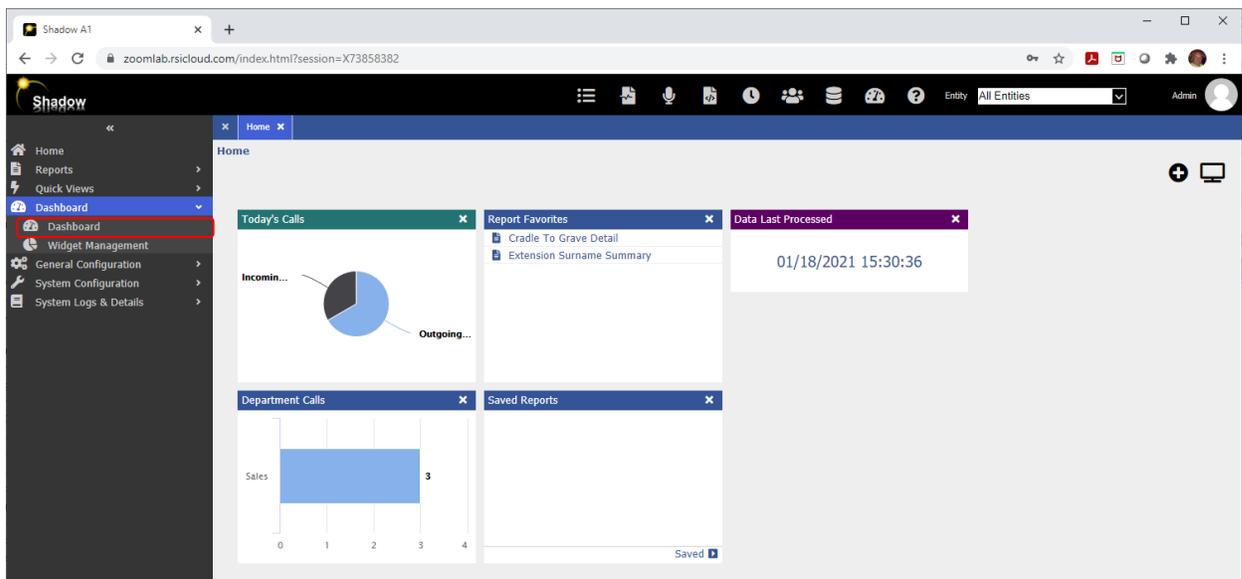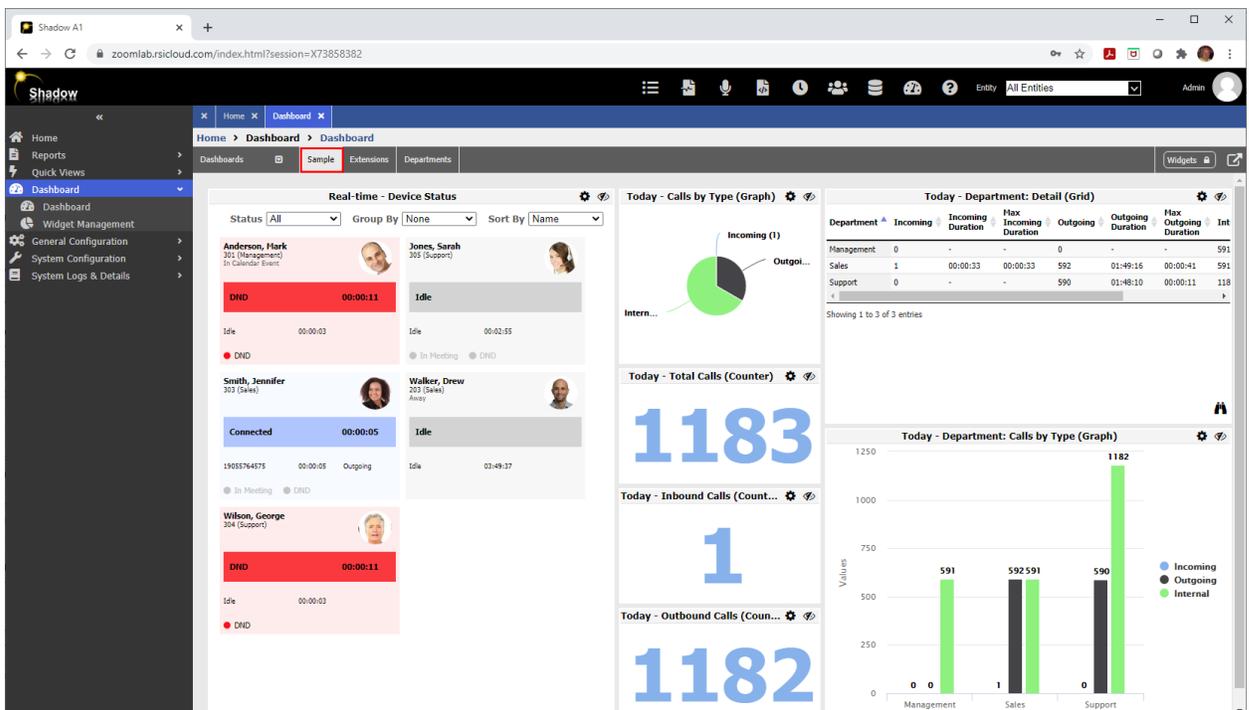
4. Your Dashboard will now be visible within the browser.
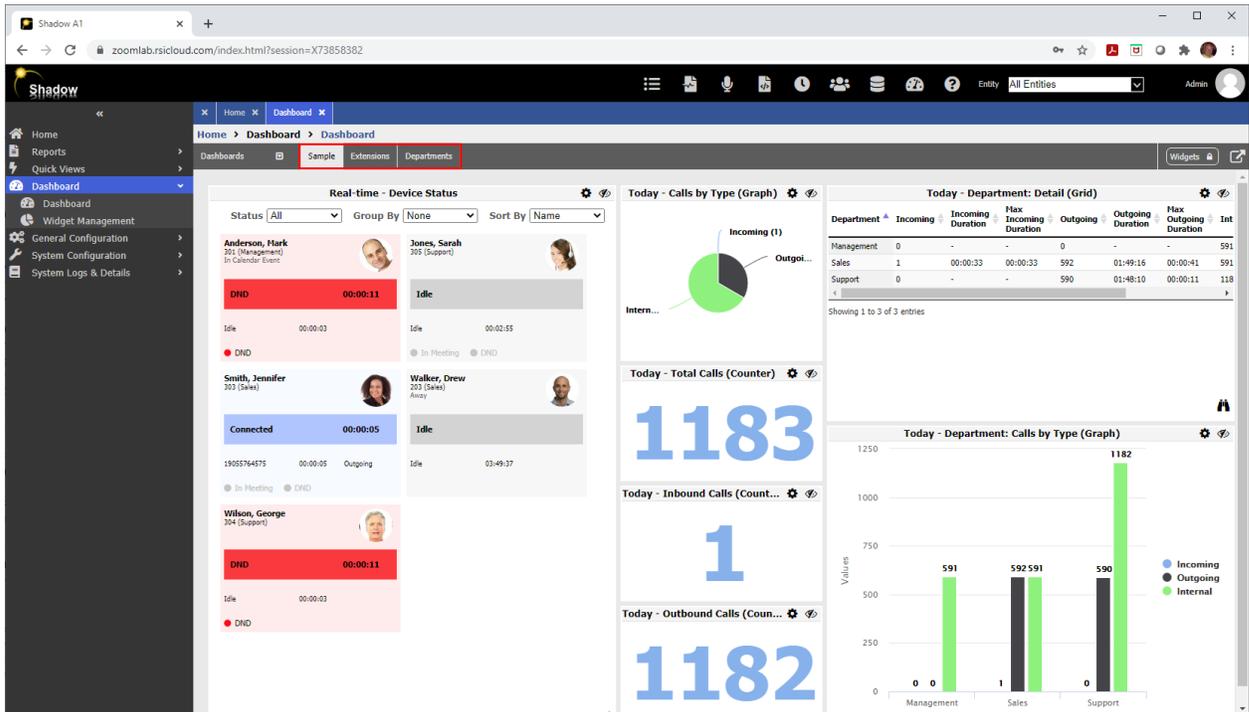
Select the Dashboard you wish to modify by clicking on its corresponding name on the dashboard tab (circled in red above). For this example we will modify the **Sample** Dashboard.

5. The **Sample** Dashboard is now visible within your browser.

6. Dashboards by default are locked to prevent a user from accidently changing/modifying the widgets. Press the Widgets button (circled in red below) located to the far right of the **Sample** Dashboard tab (circled in green) to Unlock the dashboard and allow you to make changes to it. After pressing this button the locked icon should change to reflect the dashboard is now unlocked Widgets (circled in red below). Additionally, the Widgets drop down menu will appear (circled in blue below).
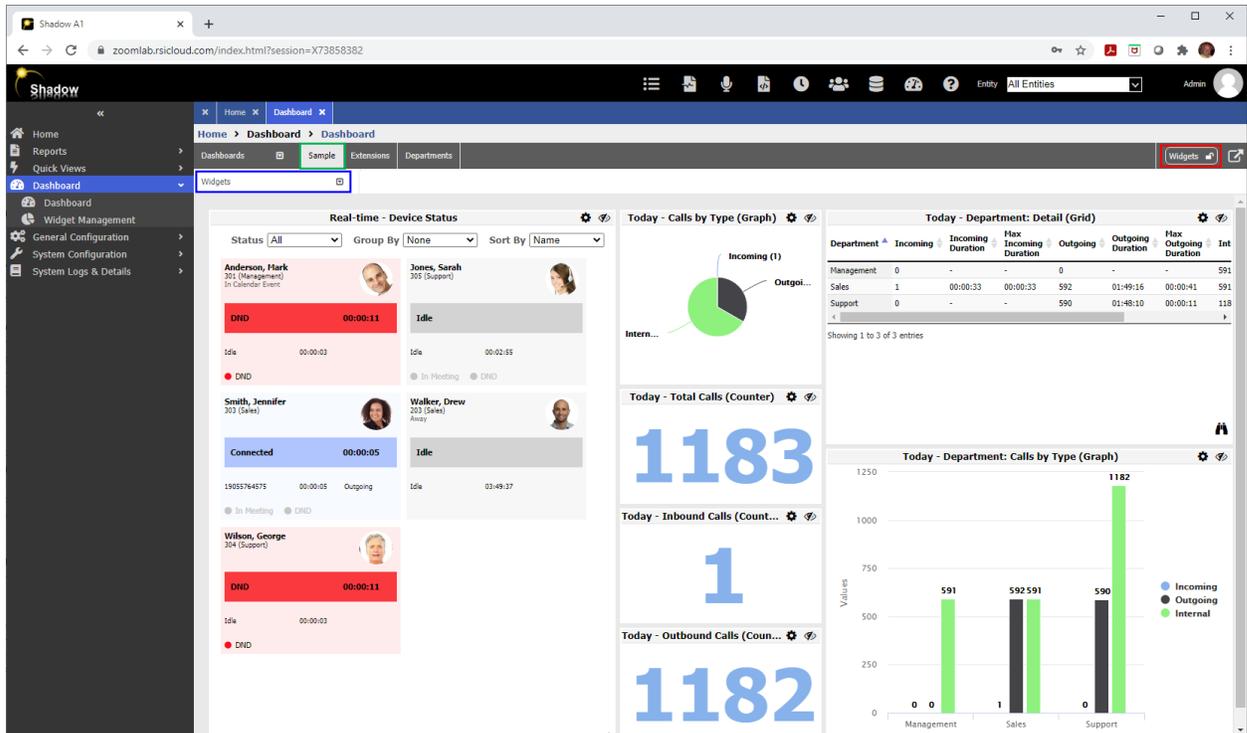

You have now successfully unlocked the dashboard and can now modfiy the currently active dashboard. See the sections below for details on how to move, resize, edit, add, and delete widgets to the active dashboard.

For details on how to create additional / new dashboard and/or delete dashboards please consult the Shadow On-Line Manual.
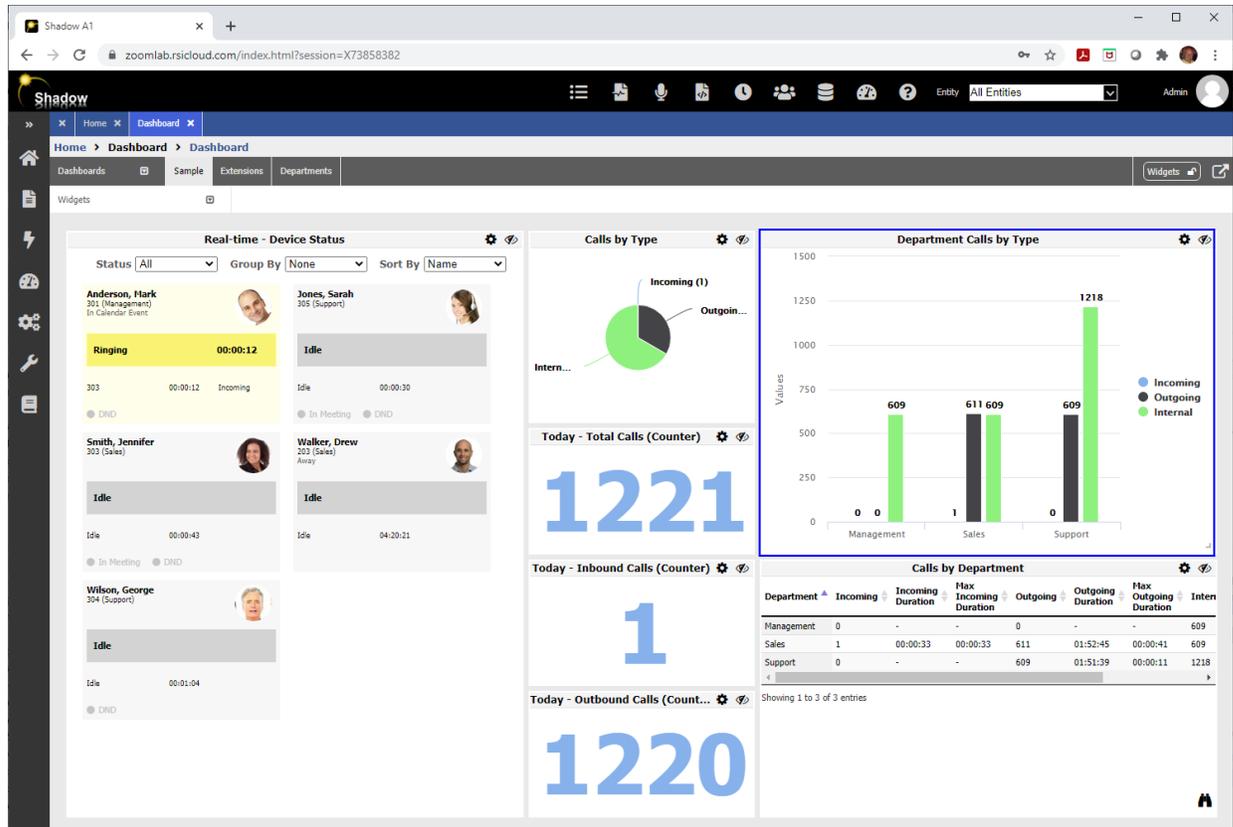
4.2.1 Moving Dashboard Widgets

Dashboard users can rearrange dashboard widgets within the dashboard viewer. However, before dashboard widgets can be rearranged the dashboard must be unlocked (see Modifying a Dashboard). Once the dashboard has been unlocked you can use the following steps to rearrange a dashboard's widget.

1. Select the desired Dashboard by clicking its Dashboard Tab. For example, to select the **Sample** Dashboard tab simply click the text **Sample** on its dashboard tab (circled in red).
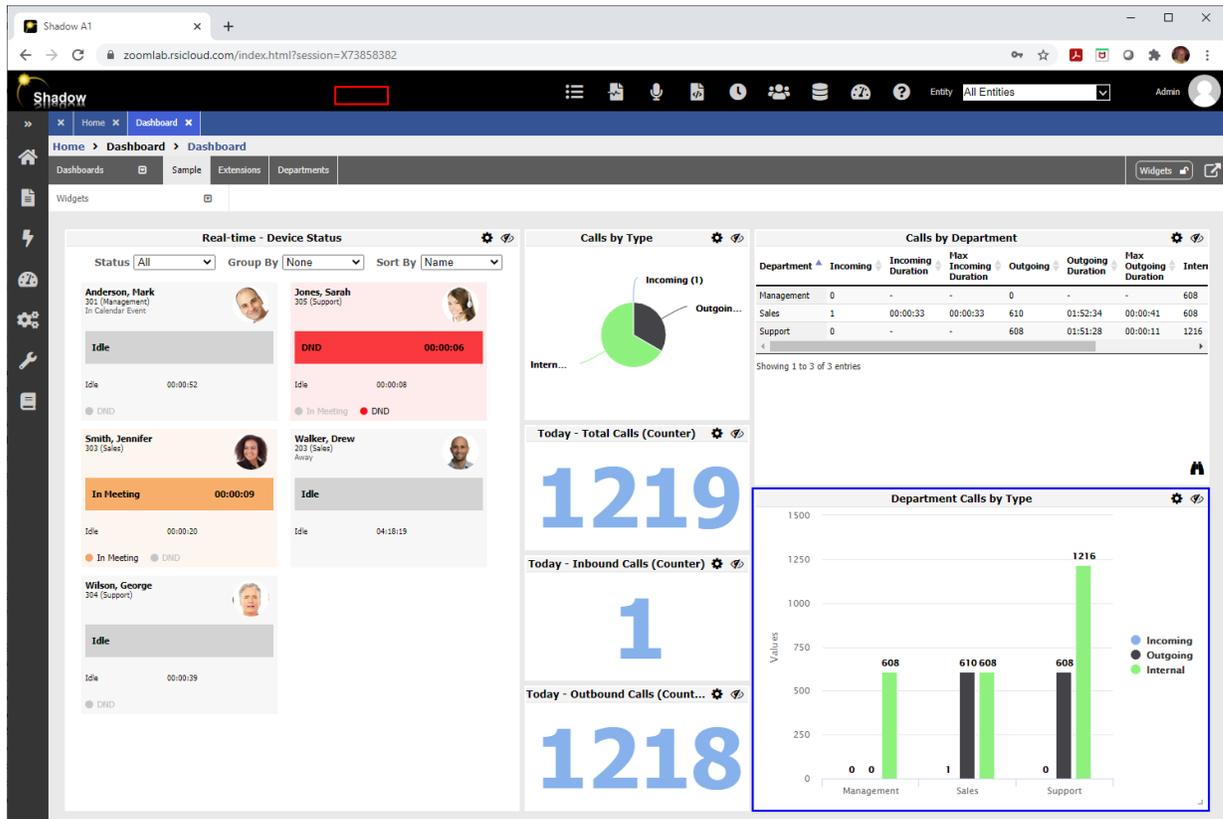
2. Position the mouse pointer over the widget you wish move. The mouse pointer will change to a hand 🖑 indicating you can now move the widget. Let's try moving the **Department Calls by Type** widget (circled in blue in step 1) above the **Calls by Department** widget. Position the cursor over any portion of the **Department Calls by Type** widget. When the mouse pointer changes to a hand 🖑, press and hold the left mouse button down and drag the **Department Calls by Type** widget to the top of the dashboard. Release the left mouse button when the top of the **Department Calls by Type** widget begins to disappear below the dashboard tab bar. The **Department Calls by Type** widget (circled in blue below) should now be repositioned to the top of the dashboard and the **Calls by Department** widgets will now be positioned below the **Department Calls by Type** widget.

3. Repeat step 2 until you have successfully rearranged the position of your dashboard's widgets.

You have now successfully rearranged your dashboard widgets. Dashboard widgets can also be resized (see Resizing Dashboard Widgets), their appearance and content can be changed (see Changing a Dashboard Widgets Appearance and/or Content), or they can be deleted (see Deleting Dashboard Widgets). You can also add widgets to an existing dashboard (see Adding Dashboard Widgets).

4.2.2 Resizing Dashboard Widgets

Dashboard users can resize dashboard widgets within the dashboard viewer. However, before dashboard widgets can be resized the dashboard must be unlocked (see Modifying a Dashboard). Once the dashboard has been unlocked you can use the following steps to resize a dashboard's widget.

1. Select the desired Dashboard by clicking its Dashboard Tab. For example, to select the **Sample** Dashboard tab simply click the text **Sample** on its dashboard tab (circled in red).


2. Position the mouse pointer over the widget you wish resize. The mouse pointer will change to a hand 🖐. Examine the bottom corner of the dashboard widget the mouse pointer is current positioned over. A backward L (⌐) should now be visible in this corner. When you position your mouse pointer over the ⌐ the cursor will change from a 🖐 to ⬉. Once the cursor changes to ⬉ press and hold the left mouse button and then move the mouse to the left, right, up and/or down to resize the widget. Let's try resizing the **Today Inbound Calls** widget. Position the cursor over ⌐ in the bottom right corner of the **Today Inbound Calls** widget. The cursor should change from a 🖐 to ⬉ (circled in red below).

When the mouse pointer changes to a hand ✎, press and hold the left mouse button down and move the mouse to the left. Release the left mouse button when its aligned with the right edge of the **Today Inbound Calls** widget. The **Today Inbound Calls** widget will now be resized (circled in blue below) and to the same width as the **Calls by Deaprtment** widget.
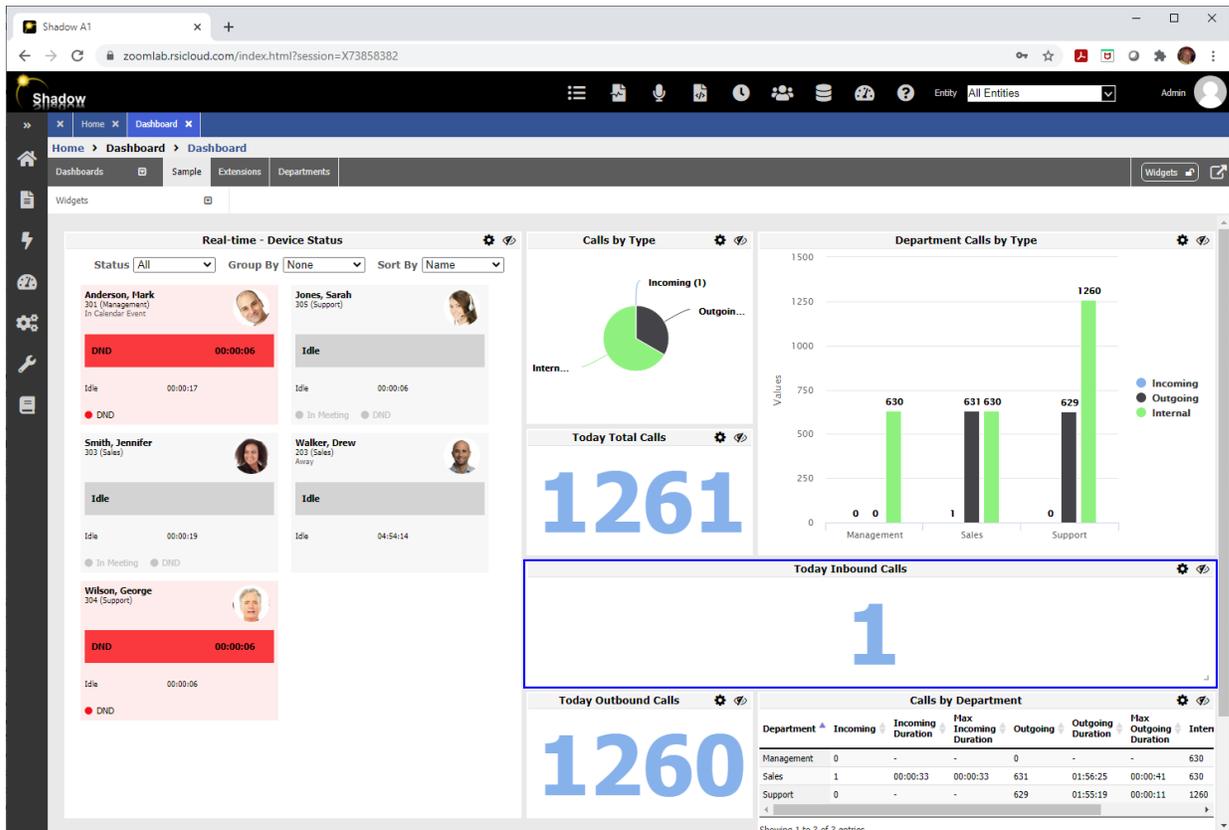

3. Repeat step 2 until you have successfully resized your dashboard's widgets as required.

You have now successfully resized your dashboard widgets. Dashboard widgets can also be rearranged (see Moving Dashboard Widgets), their appearance and content can be changed (see Changing a Dashboard Widgets Appearance and/or Content), or they can be deleted (see Deleting Dashboard Widgets). You can also add widgets to an existing dashboard (see Adding Dashboard Widgets).

## 4.2.3 Changing Dashboard Widgets Appearance and/or Content

Dashboard users can change the appearance and or content of a dashboard widget within the dashboard viewer. However, before dashboard widgets can be changed the dashboard must be unlocked (see Modifying a Dashboard). Once the dashboard has been unlocked you can use the following steps to change the appearance and/or content of a dashboard's widget.

1. Select the desired Dashboard by clicking its Dashboard Tab. For example, to select the **Departments** Dashboard tab simply click the text **Departments** on its dashboard tab (circled in red).
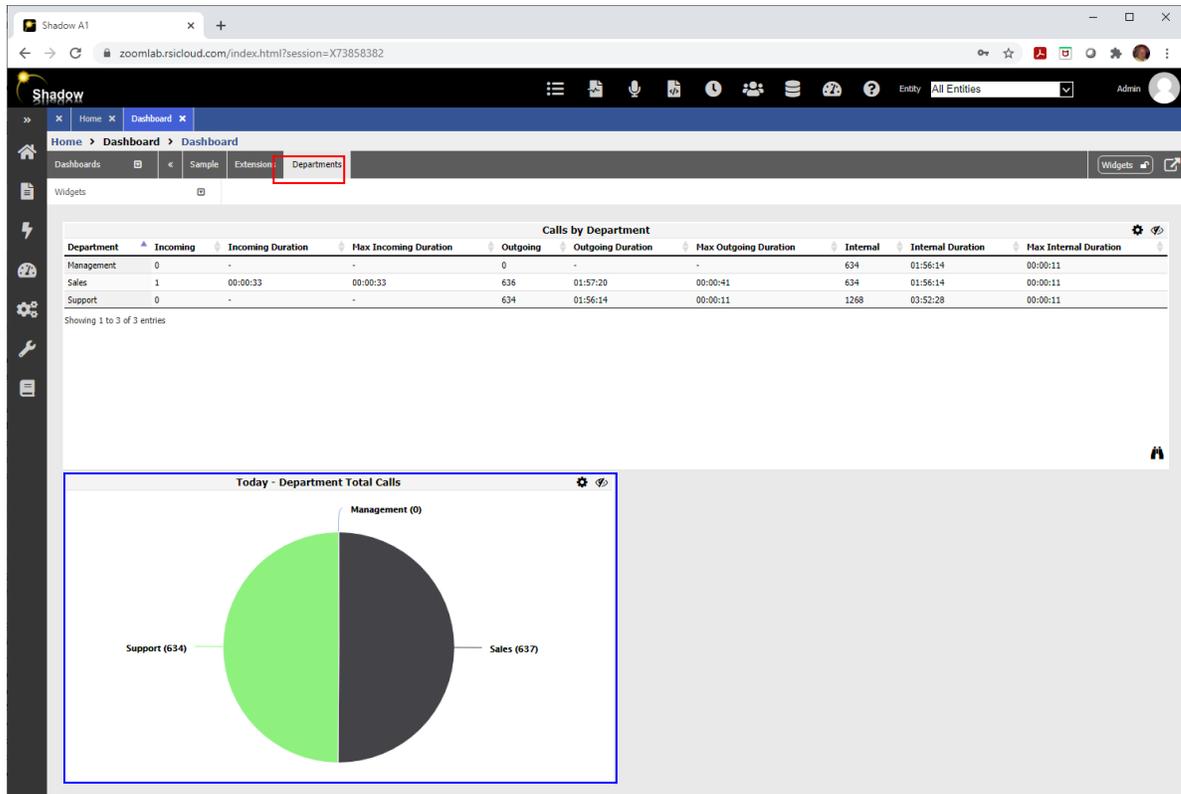
Press the Sprocket icon ⚙ located in the top right corner of the widget whose appearance and/or content you wish to change. For example, click the ⚙ on the **Today – Department Total Calls** widget (circled in blue above) to change its appearance and or content.

2. The **Today – Department Total Calls** widget's **Configure Widget** dialog should now be visible within the browser.
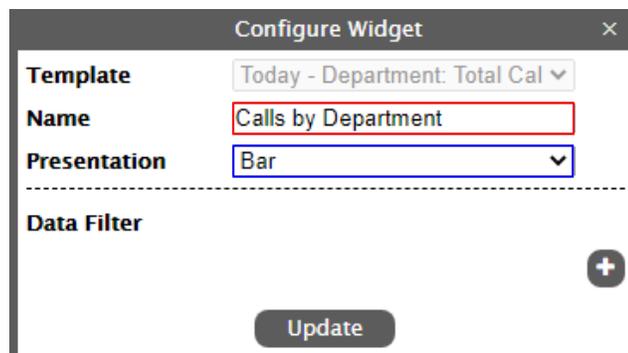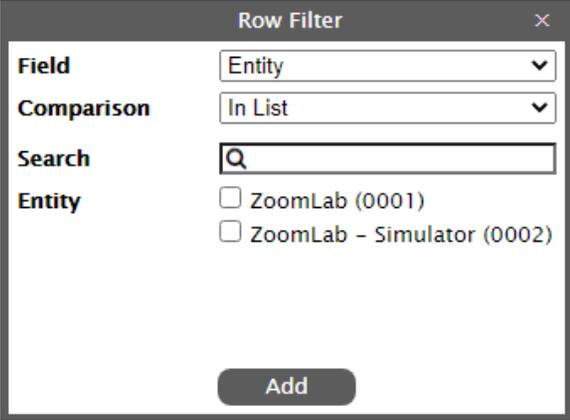

Use the Configure Widget dialog to customize the appearance of the widget and to change its content (i.e. select the data the widget utilizes).

Use the **Name** text box (circled in red) to change the title of the widget. In the above example, we have changed the title to **Calls by Department.**

Use the **Presentation** drop down box to change the presentation style (i.e. type of graph) used to display the widget's metrics. Possible values are Line, Pie, Bar, Column and Detail. Please note, the available values vary by widget. In the above example I have changed the Presentation style to **Bar** graph.

3. Press the Data Filter ⊕ button to change the content of the widget (i.e. select the call data used to populate the metrics). The Row Filter dialog box will now be displayed within your browser

Row Filter	×
Field	Entity ∨
Comparison	In List ∨
Search	🔍
Entity	☐ ZoomLab (0001)
	☐ ZoomLab – Simulator (0002)
	Add

Use the **Field** drop down list box to select a field to use to limit the data. Possible values for the above widget are Entity, Department and Total Calls. For example, use the Entity option to include call data from only specific entities (i.e. sites) in the widget.

Use the **Comparison** drop down list box option to select the type of operation to be performed on the selected Field. Possible values are Equal to (=), Starts With, Ends With, Contains, and In List. Please note, the available values will vary depending on the **Field** option selected. If you select the Equal (=), Starts With, Ends With or Contains option an additional Value option (circled in green below) will appear on the Row Filter dialog.

| Row Filter	×
Field	Department ∨
Comparison	= ∨
Value	Sales
	Add
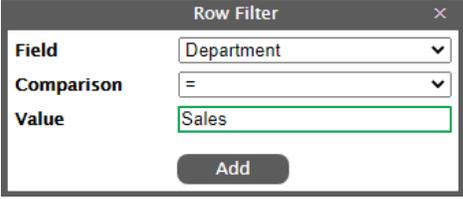
Use the Value text box to enter the Field value to use for your data (row) filter. In the above example, we are only include call metrics in the widget for the Sales department (i.e. calls to/from all other departments will be excluded from the widget).

Press the ⬤ Add button to add the data filter to the list. The Configure Widget dialog will appear with your updated settings.

Add another Data filter by pressing the ⊕ icon (circled in red). For example, if you want include the call data from both the Sales and Support departments add another data filter using setting the **Field** to **Department**, the **Comparison** to Equal **(=)** and the **Value** to **Support**. The following screen depicts the **Configure Widget** dialog after the second Department data filter has been applied.
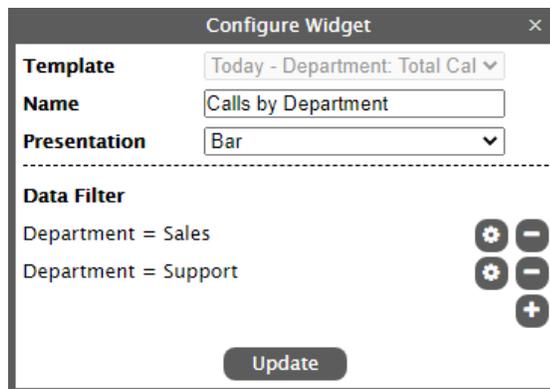
Multiple data filters on the same field will use the **OR** operation when the data filters are applied. Adding a filter on a different field will use the **AND** operation when applying the data filters. Continue to add more Data filers as required by pressing the ⊕ icon. Delete a Data Filter by pressing the delete ⊖ icon located to the right of the Data Filter item. Modify an existing Data Filter by pressing its corresponding sprocket ⚙ icon.

Press the ⬭ Update button to save your Widget configurartion settings.

4. After pressing the [Update] button the dashboard widget's appearance and content will be updated based on your configuration changes.
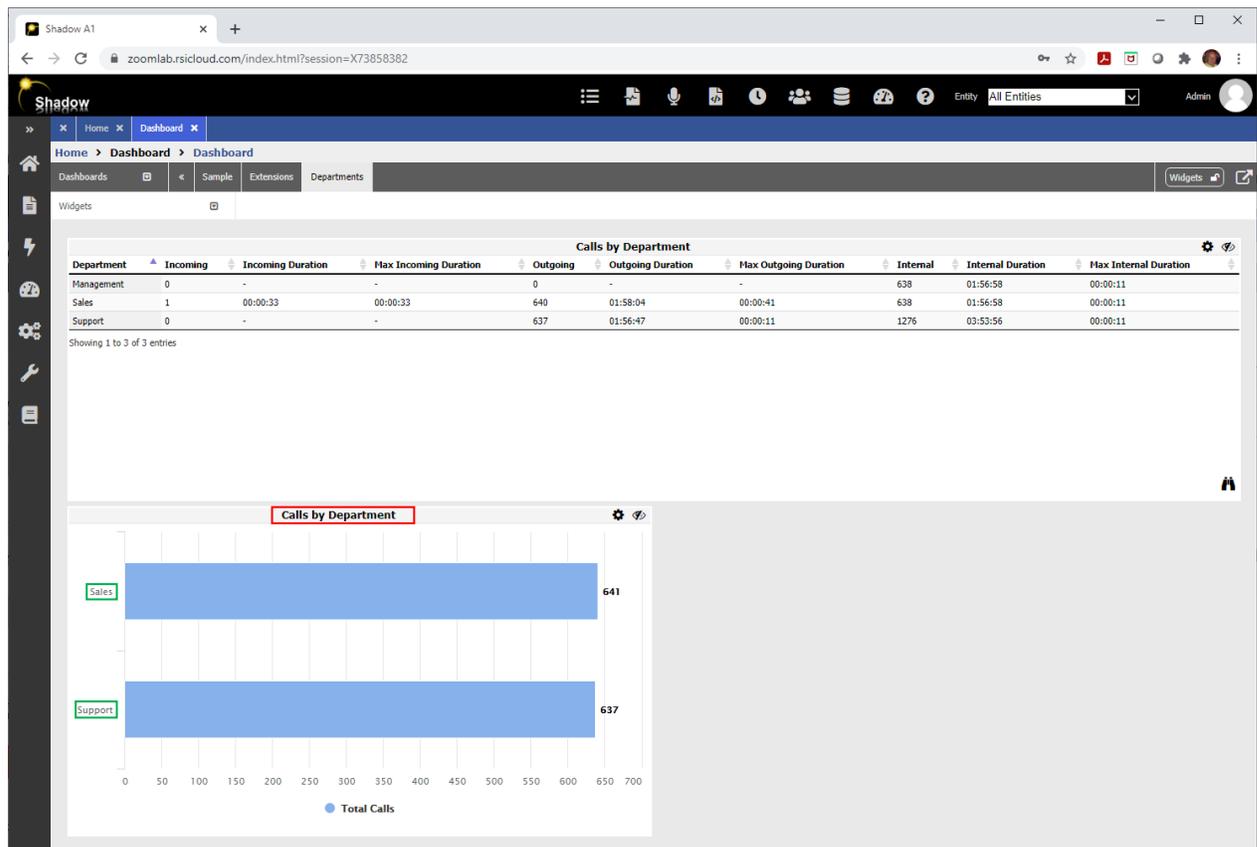
The above dashboard widget reflects the configuration changes you made above. This includes the title change **Calls by Department** (circled in red), the presnetation style (a bar graph) and the content changes (i.e. the Data Filters) limiting the widget to only display metrics for the Sales and Support departments (circled in green).

5. Repeat step 2 until you have successfully resized your dashboard's widgets as required.

You have now successfully changed the appearance and content of your dashboard widgets. Dashboard widgets can also be resized (see Resizing Dashboard Widgets), rearranged (see Moving Dashboard Widgets), or deleted (see Deleting Dashboard Widgets). You can also add widgets to an existing dashboard (see Adding Dashboard Widgets).

4.2.4 Adding Dashboard Widgets

Dashboard users can add additional widgets to an existing dashboard within the dashboard viewer. However, before dashboard widgets can be added the dashboard must be unlocked (see Modifying a Dashboard). Once the dashboard has been unlocked you can use the following steps to add widgets to an existing dashboard.

1. Select the desired Dashboard by clicking its Dashboard Tab. For example, to select the **Department** tab simply click the text **Department** on its dashboard tab (circled in red).

Click and expand the **Widgets** drop down menu (circled in blue, top left corner of dashboard) to reveal the list of available widgets you can add to the selected dashboard. Please note, if the Widgets drop down menu is not visible then press the Widgets button (circled in green) located to the far right of the **Department** tab. After pressing this button the lock image should change to reflect the dashboard is now unlocked Widgets and the Widgets drop down menu will appear.

2. The expanded Widgets drop down menu is pictured below (circled in red). The Widget drop down list will display the list or Widget Categories available to your user account.
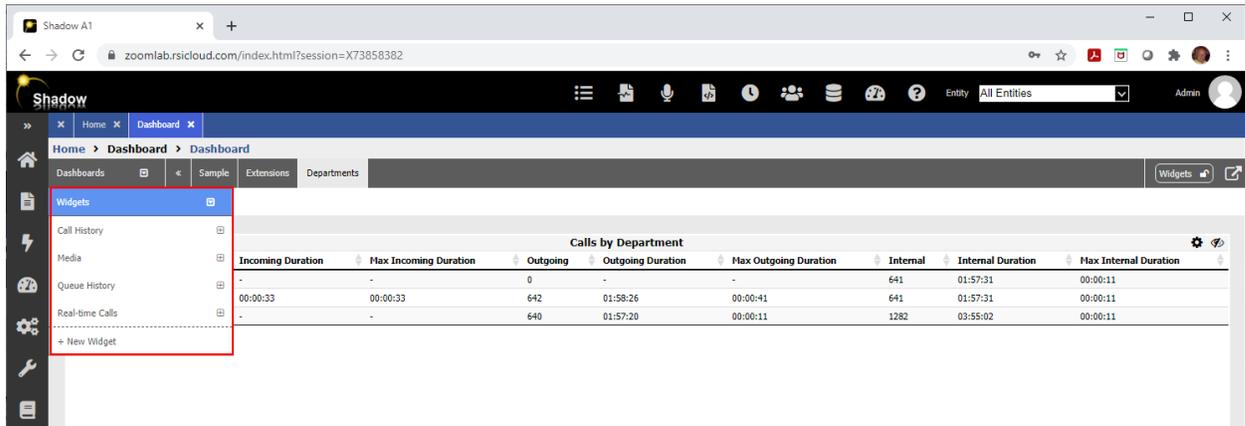
3. Click and expand the Widget Group (i.e. Call History, Meida, Queue History, Real-Time Calls, etc.) to find the widget you wish to add to your new dashboard. The following provides a summary of the Widget Groups available withing Shadow CMS.

Widgets	Description
Call History	The Call History Widget group contains widgets providing historical call metrics for the following time period sub groups; Current Hour, Hourly, Past 30 Days, and Today. Click and expand the desired sub group to reveal the list of widgets within the selected sub group. For example, click the **Today** sub group to reveal the widgets providing call metrics for the current day. These widgets will continue to update throughout the day as new calls are made / received. For example, click the **Today: Department Calls: Total Calls (Graph)** widget to add a widget to your dashboard displaying a graph depicting today's total calls by department.
Media	The Media Widget group contains widgets that can be used to add HTML pages / URLs, Images and Twitter feeds to your dashboard. For example, to add an Image Widget to your dashboard click and expand the Images option and then select the Picture item. Use the Picture Item configuration screen to provide a URL to where the image resides (this feature requires the image to be addressable using a URL / IP address).
Queue History	The Queue History Widget group contains widgets providing historical call metrics for Queues, Hunt Groups and/or Work Groups. Click and expand the Queue History Widgets menu item to reveal multiple time period sub groups; Current Hour, Hourly, and Today. Click and expand the desired sub group to reveal the list of widgets within the selected sub group. For example, click the **Today** sub group to reveal the widgets providing queue metrics for the current day. These widgets will continue to update throughout the day as new queue calls are completed. For example, click the **Today: Queue Call Summary by Queue (Graph)** widget to add a widget to your dashboard displaying a graph depicting by Queue number of calls that were Handled (Answered), Overflowed, Abandoned, went to VoiceMail, or Other (somewhere else). Additional licensing may be required for specific platforms. Please contact RSI Support Services to confirm you are licensed to use these widgets.

| Widgets	Description
Real-time Calls	The Real-time Calls Widget group contains widgets providing real-time call metrics for Extensions (Agents) and Queues (Queues, Hunt Groups and/or Work Groups). Click and expand the Real-time Calls Widgets menu item to reveal the Extensions and Queues sub groups. Click and expand the desired sub group to reveal the list of widgets within the selected sub group. For example, click the **Queue** sub group to reveal the widgets providing real-time queue metrics. These widgets will continue to update throughout the day as new queue events occur. For example, click the **Queue Status** widget to add a widget to your dashboard displaying a live Queue information including Calls Waiting, Longest Call Waiting, agent status, calls answered, calls abandoned, etc. Additional licensing may be required for specific platforms. Please contact RSI Support Services to confirm you are licensed to use these widgets.

Please note, widget categories available to you will vary depedning on the Widget privileges granted to you by the Shadow Dashboard Administrator (see Dashboard Widget Management in the Shadow On-Line Manual for more details). Additionally, not all widgets are compatible with all phone / collaboration systems. Additional licensing may also be required to access and use specific widgets (contact RSI Support Services for details).

The following steps detail how to add a Call History widget to your new dashboard.
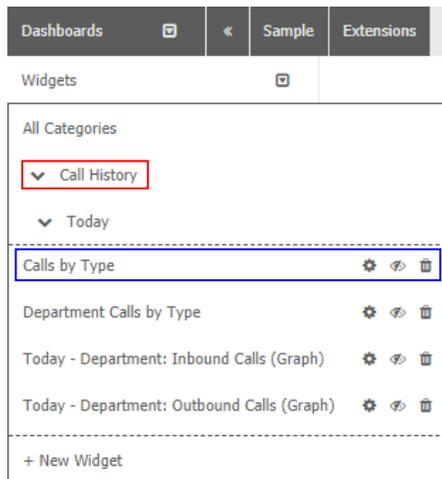
4. Click and expand the **Widgets** menu item below the Dashboard tabs (circled in red).
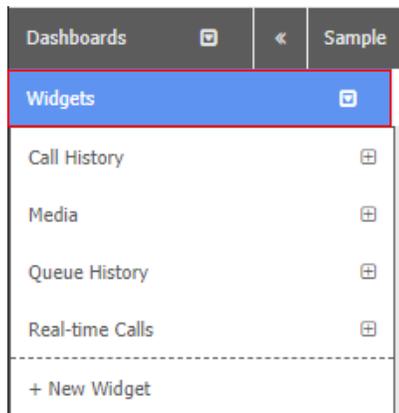

Next, click and expand **Call History** Widget group (circled in red) in the Widgets menu.
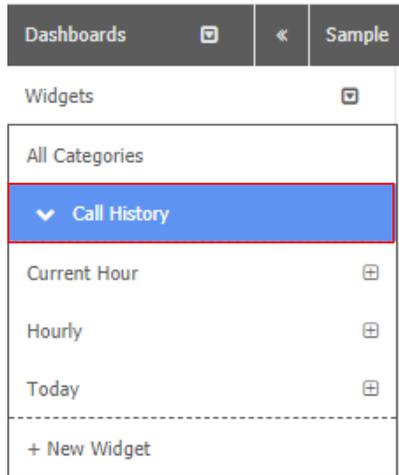
5. Next, click the **Today** sub group to reveal the widgets providing call metrics for the current day.

6. Finally, click the **Calls by Type** menu item (circled in blue in the previous step) to add the widget to your dashboard. The **Calls by Type** (circled in red below) widget should now be visible on the dashboard. Please note if the dashboard page is full the added widget may not currently be visible. Use the vertical scroll bar on the right side of the dashboard to scroll down until the new widget appears.
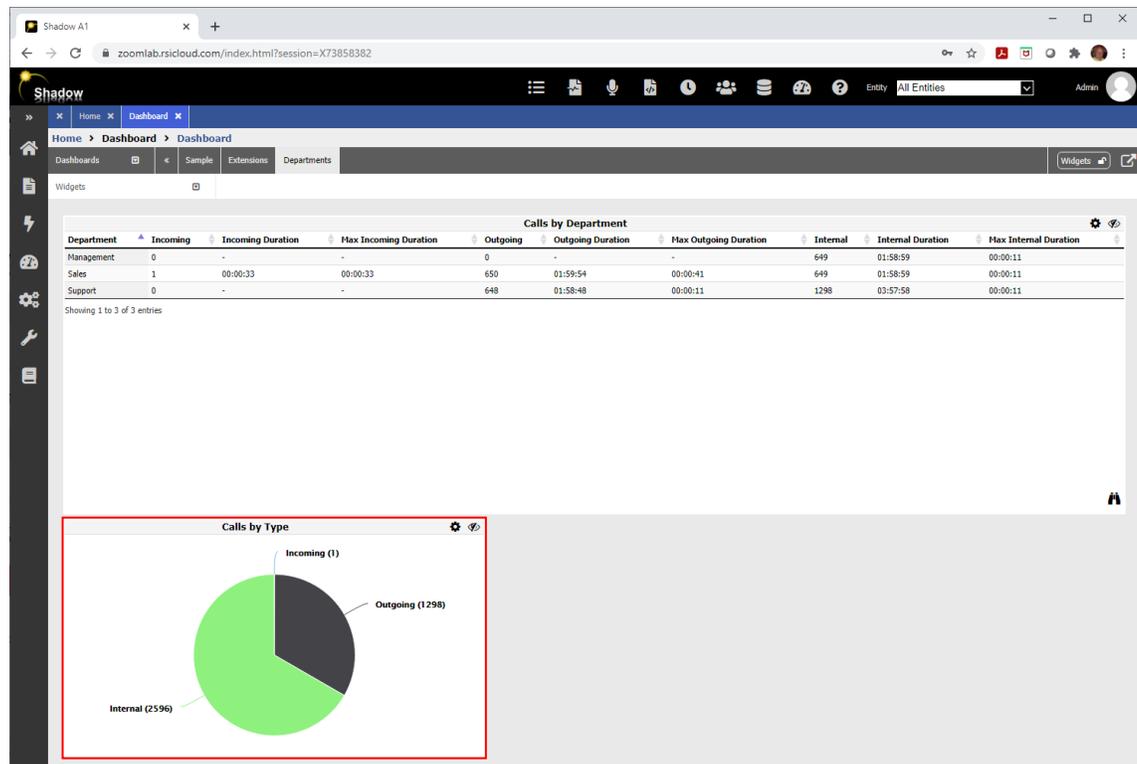
Reposition the newly added **Calls by Type** widget by clicking on the widget and dragging it to its new location within the dashboard (see Moving Dashboard Widgets).

Resize the newly added **Calls by Type** widget by clicking on the bottom right corner of the widget and dragging your mouse up, down, left and / or right (see Resizing Dashboard Widgets).

Click the Sprocket icon ⚙ located in the top right corner of the widget to change the appearance and/or content of the widget (see Changing Dashboard Widgets Appearance and/or Content).

Delete the newly added **Calls by Type** widget by clicking on the eye 👁 icon located in the top right corner of the widget (see Deleting Dashboard Widgets).

7. Repeat steps 2 – 4 to add additional widgets to the currently selected dashboard (i.e. **Department** Dashboard).

You have now successfully added new widgets to the currently selected dashboard. Dashboard widgets can also be resized (see Resizing Dashboard Widgets), rearranged (see Moving Dashboard Widgets), deleted (see Deleting Dashboard Widgets), or their appearance and content can be changed (see Changing a Dashboard Widgets Appearance and/or Content).

4.2.5 Deleting Dashboard Widgets

Dashboard users can delete a dashboard widget within the dashboard viewer. However, before dashboard widgets can be deleted the dashboard must be unlocked (see Modifying a Dashboard). Once the dashboard has been unlocked you can use the following steps to delete a dashboard's widget.

1. Select the desired Dashboard by clicking its Dashboard Tab. For example, to select the **Sample** Dashboard tab simply click the text **Sample** on its dashboard tab (circled in red).
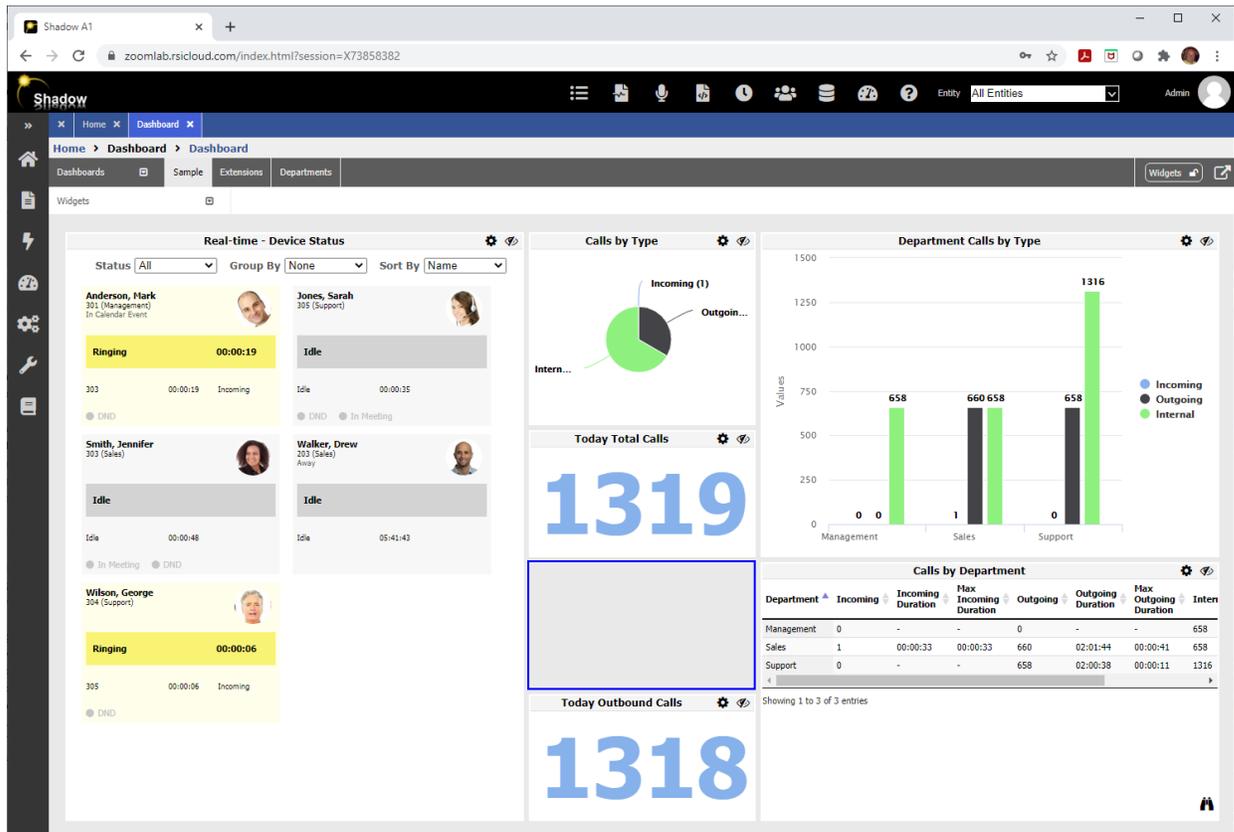

2. Delete the **Today Inbound Calls** widget by clicking on the eye 👁 icon located in the top right corner of the widget (circled in red below).

3. The **Today Inbound Calls** widget will now be deleted (circled in blue below).

4. Repeat step 2 and 3 until you have deleted all the dashboard's widgets you wish to remove.

You have now successfully deleted one or more dashboard widgets. Dashboard widgets can also be resized (see Resizing Dashboard Widgets), rearranged (see Moving Dashboard Widgets), or their appearance and content can be changed (see Changing a Dashboard Widgets Appearance and/or Content). You can also add widgets to an existing dashboard (see Adding Dashboard Widgets).

5.0 RSI Support Services

5.1 The RSI Support Network

RSI Support Services provides you access to a wide range of facilities, services and responsive technical support personnel. We recognize that each customer is unique and requires special attention. Our international dealer network is backed by our team of technical support professionals. Annual support programs provide customers direct access to the RSI Support Services Help Desk, Live Chat, Email services, Diagnostic Remote Access Support (where available) and upgrades.

If you have a question about your RSI product, first look in the printed documentation or consult its on-line help. If you cannot find the answer use one of the RSI Support Network options.

5.2 Direct Support

In United States and Canada, support is available to all customers during the 90 days following installation. Extended support may be obtained by subscribing to an RSI Support Services plan. Eligible customers may call the RSI Support Services Line via a toll call between 8:30 AM and 6:00 PM Eastern time, Monday through Friday, excluding holidays.

- Facsimile Support Services   (905) 576-4705
- Technical Support Services   (905) 576-4575 or (718) 701-0945
- Installation/Training Services   (905) 576-4575 x 231
- Email Support Services   support@telecost.com
                                      http://www.telecost.com/#!/url=feedback.php
- Live Chat Support Services   http://www.telecost.com/#!/url=chat.php

If a support specialist is not available, the customer may hold in queue for the next available specialist or create a call back trouble ticket for the support team. When a customer calls our support help desk they should be prepared to provide the following information:

*   Product Version Number
*   Type of hardware they are using, including network hardware, if applicable
*   The operating system they are using and version number
*   The exact wording of any errors or messages on their screen
*   What tasks they were running or what they were doing when the error occurred
*   What other applications were running at the same time
*   How they tried to solve the problem

5.3 Remote Access Support

Customers with a valid maintenance contract can also utilize RSI Remote Access Support Services during standard support hours (8:30 am to 6:00 pm, Monday through Friday, excluding holidays). Remote Access Support is available utilizing the following support tools.

- VPN / Remote Desktop
- Dualmon / TeamViewer – These remote services tools are provided by RSI
- Collaboration Tools – Contact RSI for a list of Collaboration tools utilized by RSI
- WinVNC

Please note the customer is responsible for all software and licenses required at their location to implement remote support. Additional charges may be incurred for providing remote support using non-standard products. Additionally, the customer is responsible for providing RSI support staff with any software and licenses required to provide remote access via these non-standard products (i.e. VPN, etc).

* Additional charges may apply for long distance toll charges.

5.4 Electronic Support

Customers may send and receive mail and chat messages to/from RSI Support Services representatives at:

Email:	support@telecost.com
Chat:	http://www.telecost.com/#!/url=chat.php
Website:	http://www.telecost.com/#!/url=feedback.php

5.5 Installation/Training Services

RSI provides all product training and installation services to Customers (end users). Customers with a valid support agreement can receive additional training and/or software re-installation support (i.e. assistance moving or re-installing/activating RSI products and services). All Installation and training services must be scheduled via an RSI Project Coordinator.

Installation/Training Services   (905) 576-4575 x 231 or (718) 701-0945 x 231

5.6 Online Resources

Here you will find the most up-to-date information about product features, enhancements, documentation, startup guides and sales brochures.

Web Site: http://www.telecost.com/   (Sales/Product brochures)
FTP Site: http://ftp.telecost.com/   (requires a user account and password)

Please note product documentation and start up guides are included in PDF format with your software products. These manuals are accessible via the RSI Product's user interface (typically located under the Help or about menu items).