

# **GENESYS**

This PDF is generated from authoritative online content, and is provided for convenience only. This PDF cannot be used for legal purposes. For authoritative understanding of what is and is not supported, always use the online content. To copy code samples, always use the online content.

User's Guide

Journey Timeline Interface

## Contents

- 1 Journey Timeline Interface
  - 1.1 Login
  - 1.2 Search a Customer with Customer Journey
  - 1.3 Manage the Timeline
  - 1.4 Display States and Tasks
  - 1.5 Display Details related to Service and State Selection
  - 1.6 Integrate with UCS Profiles

## Journey Timeline Interface

#### Important

Starting in 8.5.103.16, you must enable profiles in UCS to access this interface.

8 Mobile Services		heath		demo 🛩	
Phone Number 🤟 🛰 5125	^	both			_
Customer Name : Jones John				Filter	-
© Q ¥ ▶ 			Blue Sky Flight Status Active - 2 states Blue Sky Service Email Started - 1 state		
		APRIL 2	PRIL 3 APRIL	4	
Timeline for BlueSky Flight Stat	O 2017-10-05 - 14	l hours ago	Customer Profile KPIs Currently Selected : All	Journey Details Services → <u>BlueSky Flight Status</u>	-
12:01:1	3 GMT+2 ? Blue	2Sky Flight Times tompleted in 2 hours	Completed Active	bution of States in BlueSky Flight Status 10 9 8	
BlueSky Preferred Airport <ul> <li>Active - 5 minutes and in progress</li> </ul>	2 14:21:37 GMT+2			6	

The Journey Timeline is a web-based interface that provides a visualization of Context Services data. This interface is intended to be used by developers and supervisors looking for detailed information about a specific customer because it is built to search for profiles, services, states, and tasks based on ID information or UCS information. It does not include all the search abilities that are available in typical agent interfaces.

Starting in 8.5.103, you can customize this interface.



The Journey Timeline is available only for single-tenant installations.

#### Login

ဗီ Mobile Services			demo 🗸
	ß		
Admin UI	Callback and Mobile Engagement	Context Services	Journey Timeline
135.39.46.7:90/genesys/develop/index.html#/cs			Genesys Mobile Services 8.5.111.04

The Customer Journey Timeline is available as part of the GMS Service Management User interface (you can read help information here). To access this interface, you must login as a user who owns the Administrator or Supervisor privilege.

Then, you can select the Journey Timeline item and:

- 1. Search and select a customer.
- 2. Visualize the customer's Journey Timeline.

#### Important

If you do not see the Journey Timeline item, it means that you did not enable Context Services properly.

## Search a Customer with Customer Journey

Q Search	/
	(
	7
	Q Search

You can query a user based on the email address, phone number, and name fields. These fields must match a value in the UCS database to work correctly. There is no automatic completion available.

Select a key in the search drop-down menu, then enter a value in the Search textbox. The value must match a UCS entry to get a result.

ich of these	Customers	s are you referring to?					
Last Name	First Name	Phone	Email	Country	State	City	Language
Jones	Jane	5125 (main), 6515559881, 6505559881	jones@demosrv.genesyslab.com	USA	IL	Smallville	Spanish
Jones	John	5125		USA	IL	Smallville	English
Jones	Billy	5125 <sup>(h)</sup>		USA	IL	Smallville	English
Thompson		5125					

The interface displays a list of results. Select a customer in the list to display the customer's timeline.

#### Important

You can customize the searched items through JSON configuration. See Customizing Profiles.

## Manage the Timeline

Custor	ner Name : Jones Jane							Filter
⊕ <b>,</b> ⊖		(1162) Started · 2 states	Billin • Co	<b>)</b> mpleted · 2 states	(1162) Completed	Phone Active - no states		$\checkmark$
4 €		Support Completed · 4 states		Sales	e Supp	ort rted · 4 states	port pmpleted · 1 state	
➡	default				c Credit	15 states		
∧	FEB.	JUNE OC	T. FE	в.	JUNE	OCT.		
	2014		2015	Filte	r the	servic	es here	/
				1 1100				

## Expand or contract the timeline

And parts		8.87.00	
1.4.8		10001-01	
100	-	10.01	_
0.000	1	Constant.	
AUT 101			

The timeline shows all the customer's services and their current status (active, inactive). If you select a service, Customer Journey displays the list of states for the given selection.

- You can manage the timeline (expand or contract) by using the icons in the left menu sidebar.
- You can zoom or navigate to services by using the icons in the left menu sidebar, or you can simply leftclick in the timeline to move it.
- You can also filter the displayed services.

## Display States and Tasks



If you select a service in the timeline, for instance, Agency, its nested states and tasks are displayed in the Vertical Timeline. You can then select one of them to get KPIs, customer or journey details.

#### Important You can customize the display through templates. See the guidelines in the Developer's Guide.

## Display Details related to Service and State Selection

Customer Profile	KDIe Journey Detaile	
	Kris Journey Details	
Identification		
Customer Name	Jones Jane	
Title	Sr. Product Manager	
Company	Genesys	
Segmentation		
City	Smallville	
Language	English	
Sentiment	Positive	
Contact Inform	ation	
Phones	5125	
	6504661100	
Emails	jones@demosrv.genesyslab.com	
	jane@gmail.ca	



The selection in the horizontal and vertical timelines automatically updates the information area.

#### Important

You can customize the display through templates. See the guidelines in the Developer's Guide.

## Integrate with UCS Profiles

If you enabled Customer profiles in UCS, you can integrate Journey Timeline with UCS profiles as follows:

- Install and set up NGINX on your local machine
- Ensure that the NGINX configuration includes the following information:

location /genesys/1/cs/profiles { proxy\_pass http://<location of UCS>/profiles; }
location /genesys { proxy\_pass http://localhost:8080/genesys; }

#### You can read more details here.