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Service Management UI Help

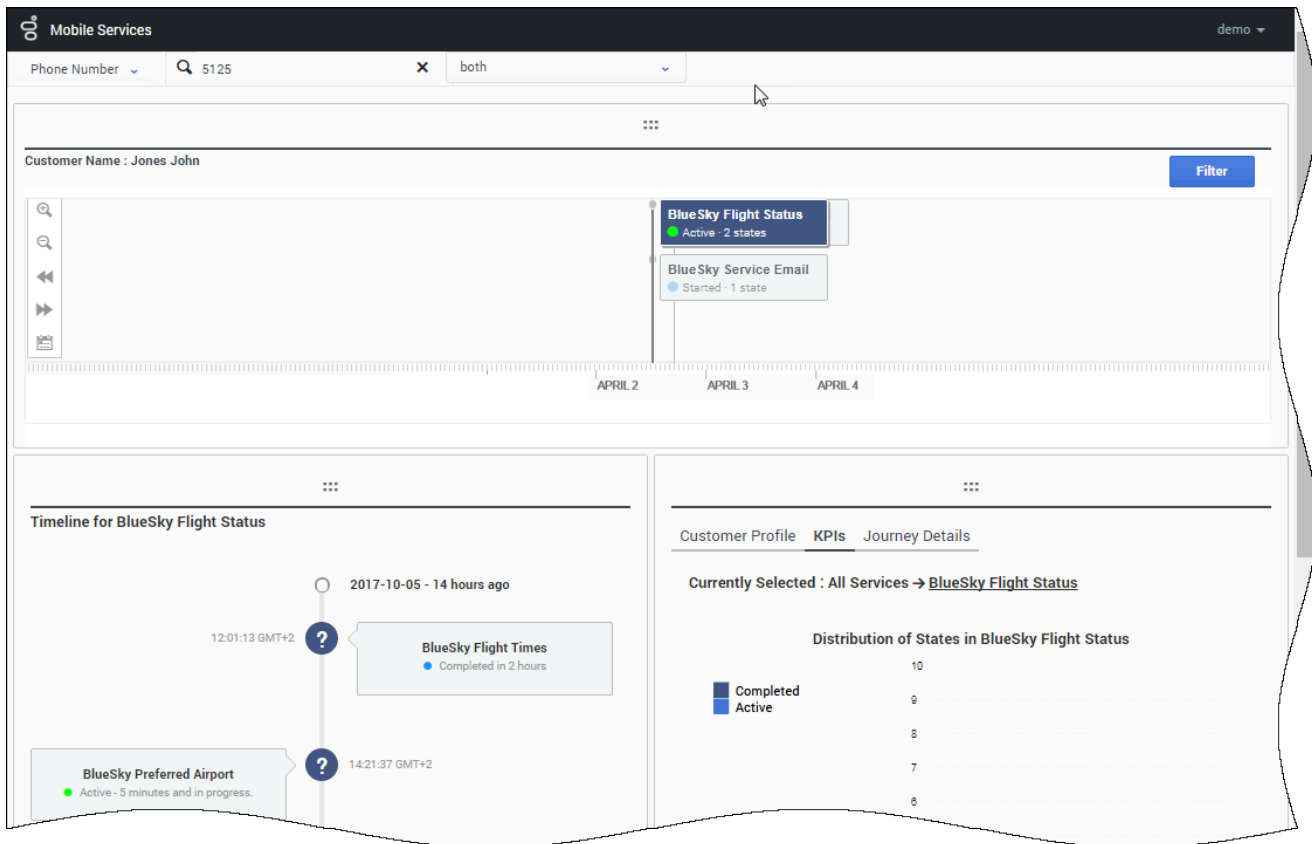
Journey Timeline Interface

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Journey Timeline Interface



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.

[+] Tell me why

This interface 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.

Important

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

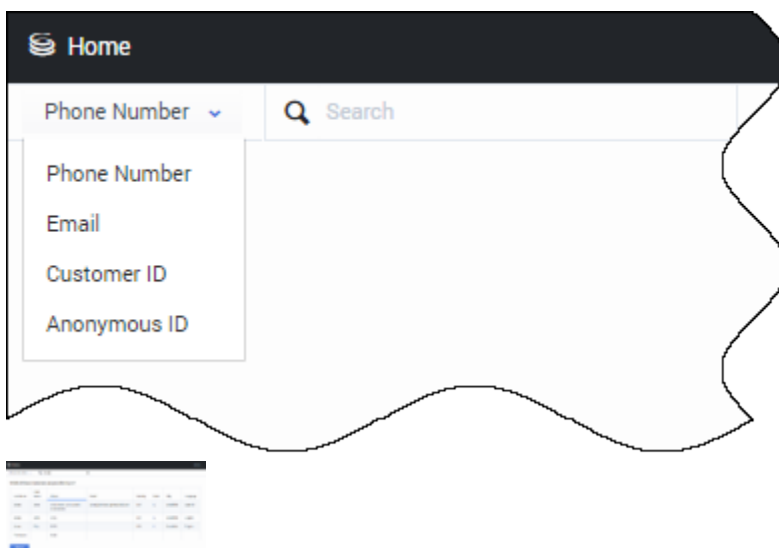
Accessing the Journey Timeline

Journey timeline can be accessed from the Context Services interface which is available as a standalone application. The steps to download and install the service is detailed in [Installing Standalone Context Service](#).

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



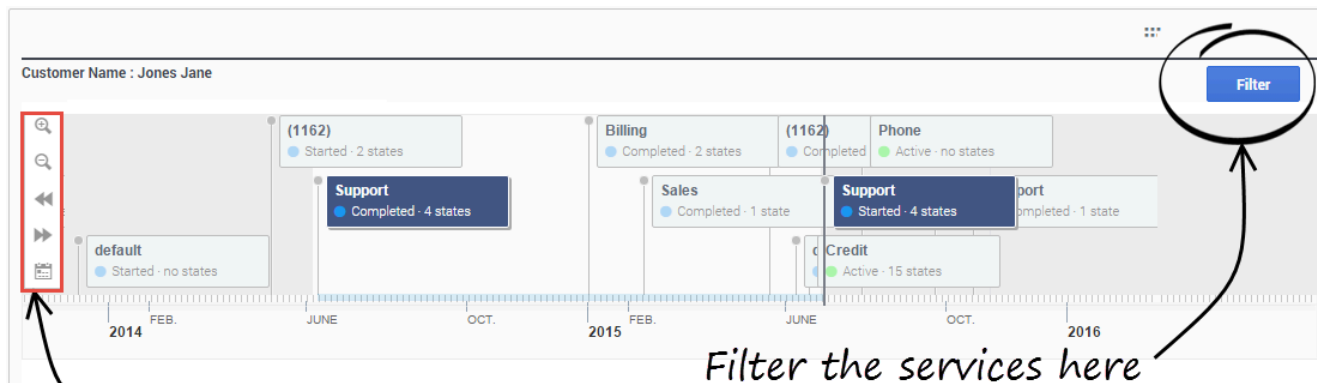
You can query a user based on the email address, phone number, and name fields. These fields must match a value in the UCS database to work correctly. There is no automatic completion available.

1. 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.
2. 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



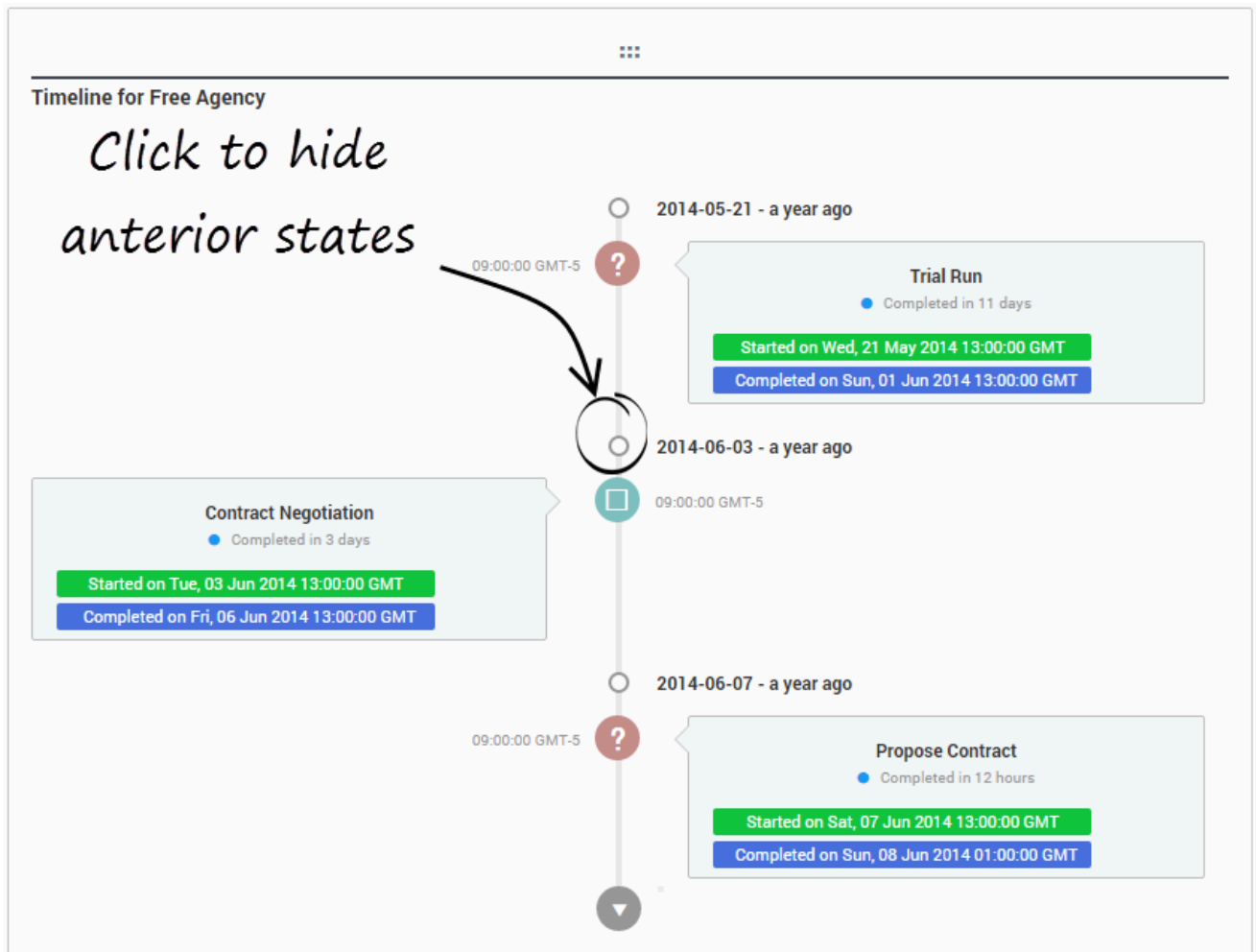
Expand or contract the timeline



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 left click 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 KPIs Journey Details

Identification

Customer Name

Jones Jane

Title

Sr. Product Manager

Company

Genesys

Segmentation

City

Smallville

Language

English

Sentiment

Positive

Contact Information

Phones

5125
6504661100

Emails

jones@demo.srv.genesyslab.com
jane@gmail.ca



The selection in the horizontal and vertical timelines automatically update 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](#).