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Work with Genesys CX Insights Reports

Milestone Path Analysis Dashboard

7/25/2024

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- Administrator
- Supervisor

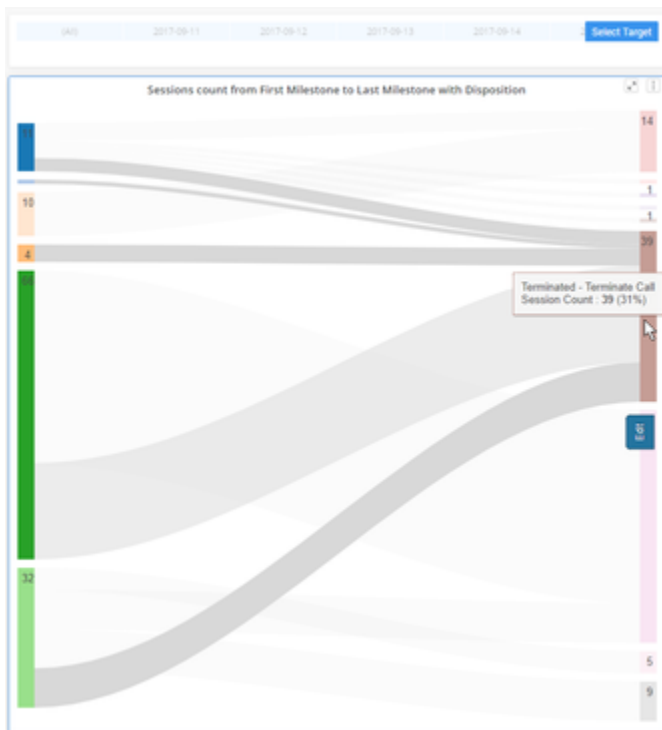
Explore the first and last milestones customers traversed, and the number of sessions that ended in each final disposition.

Related documentation:

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RSS:

- [For private edition](#)



Milestone Tab, Sankey View

Start Milestone	Last Milestone	Final Disposition	Success Count
Vehicle Installed	Delivered to Dealer	Abandoned in Dealer	4
		Abandoned - Terminate Call	8
	Vehicle Delivered	Terminate - Business Hours	1
		Terminate - After Hours	1
		Terminate - Out of Scope	1
Vehicle Installed	Abandoned in Call Center	Abandoned in Call Service	1
Call	Abandoned in Call	Abandoned - Terminate Call	1
Next Milestone in	Next Milestone in	Abandoned in Dealer	10
When the number of your vehicle	Has the Company	Terminate - Terminate Call	4
Abandoned?	in Dealer	Terminate - Terminate Call	10
	in Agent	Abandon	80
	in Agent	Terminate - Terminate Call	1
	in Agent	Abandon	8
High	High/Low	Terminate - Terminate Call	1
	Low	System Error	1
High/Low	Abandon	Abandon	1
High/Low	Completed in Call Service	Completed in Call Service	1

Milestone Tab, Data View



Milestone Tab, Final Disposition View

Start Milestone	Last Milestone	Final Disposition	Success Count
2017-01-01	High/Low	Terminate - Terminate Call	4
	Low	System Error	1
	High/Low	Terminate - Terminate Call	1
	in Agent	Abandon	10
	in Agent	Terminate - Terminate Call	8
	in Agent	Abandon	1
	High/Low	Abandon	1
	High/Low	Completed in Call Service	1
2017-01-10	Next Milestone in	Abandoned in Dealer	10
2017-01-10	High/Low	Terminate - Terminate Call	1
	Low	System Error	1
	High/Low	Terminate - Terminate Call	1
	in Agent	Abandon	10
	in Agent	Terminate - Terminate Call	8
	in Agent	Abandon	1
	High/Low	Abandon	1
	High/Low	Completed in Call Service	1
2017-01-14	Delivered to Dealer	Abandoned in Dealer	4
	Vehicle Delivered	Terminate - Terminate Call	8
		Terminate - Business Hours	1
		Terminate - After Hours	1
	Vehicle Installed	Terminate - System Error	1
		Abandoned in Call Service	1
	Has the Company	Terminate - Terminate Call	4
	Abandoned in Call	Terminate - Terminate Call	1
2017-01-16	High/Low	Terminate - Terminate Call	1
	Low	System Error	1
	High/Low	Terminate - Terminate Call	1
	in Agent	Abandon	8
	in Agent	Terminate - Terminate Call	1
	in Agent	Abandon	1
	High/Low	Abandon	1

Milestone Tab, Last Milestone View

Day	Final Disposition	ANI	Session Count
2/1/2019	Completed - Self Service	Total	4000
		0000000000	1000
		0000000001	1000
		0000000002	1000
		0000000003	1000
		0000000004	1000
		0000000005	1000
		0000000006	1000
		0000000007	1000
		0000000008	1000
2/1/2019	Open - Error	Total	1000
		0000000000	1000
		0000000001	1000
		0000000002	1000
		0000000003	1000
		0000000004	1000
		0000000005	1000
		0000000006	1000
		0000000007	1000
		0000000008	1000
2/1/2019	Transfer - Transfer to Call	Total	1000
		0000000000	1000
		0000000001	1000
		0000000002	1000
		0000000003	1000
		0000000004	1000
		0000000005	1000
		0000000006	1000
		0000000007	1000
		0000000008	1000
2/1/2019	Abandoned - Queue	Total	1000
		0000000000	1000
		0000000001	1000
		0000000002	1000
		0000000003	1000
		0000000004	1000
		0000000005	1000
		0000000006	1000
		0000000007	1000
		0000000008	1000

ANI Tab, Last Milestone View

The (**Designer** folder) Milestone Path Analysis Dashboard provides detailed information and visualizations illustrating the first and last milestones customers traversed, and the number of sessions that ended in each final disposition.

Understanding the Milestone Path Analysis Dashboard

The Milestone Path Analysis Dashboard is divided into two tabs:

- **Milestone Analysis** tab — Views on this tab allow you to explore the first and last milestones users encountered and the number of sessions that terminate in each configured outcome (Final Disposition). This tab offers four dynamic, interactive views:
 - Data View — Detailed information about the number of sessions, first and last milestones, and disposition.
 - Visual View — This *sankey* diagram view provides an interactive visual representation that explores the session count from the first milestone to the last milestone, including the disposition. Hover over visual elements to learn what each number represents, or use the Filter option to focus on particular milestones or days. Optionally, you can edit the dashboard to show full text labels, instead of only values.
 - Final Dispositions — Detailed and visual representations of the number of sessions that reached each Final Disposition. Hover over visual elements to learn what each number represents, or use the Filter option to focus on particular milestones or days.
 - Last Milestone View — Detailed information, sorted by day, about the Last Milestone sessions passed before completion. Optionally, remove the Day attribute from this view, to organize data by Final Disposition.
- **ANI Analysis** tab — Detailed information about the Final Disposition for each caller, based on Automatic Number Identification (ANI), and sorted by day. Use the Filter option to focus on specific ANIs, or add additional columns.

To get a better idea of what this dashboard looks like, view sample output from the dashboard:

SampleMilestonePathAnalysisDashboard.pdf

Video: Customizing labels in the Sankey view

[Link to video](#)

Change the label display format in the Sankey View.

Video: Filtering the Sankey view

[Link to video](#)

Filter the view to focus on selected milestones or applications.

Video: Editing the Last Milestone view: remove Day filtering

[Link to video](#)

Remove the Day attribute from the Last Milestone view.

The following tables explain the prompts you can select when you generate the dashboard, and the metrics and attributes that are represented in the dashboard:

Prompts available for the Milestone Path Analysis Dashboard

The following table explains the prompts available on the Milestone Path Analysis Dashboard:

Prompt	Description
Pre-set Date Filter	From the convenient list of predefined dates, choose a date for which to run the report.
Start Date	Choose the first day from which to gather data into the dashboard.
End Date	Choose the last day from which to gather data into the dashboard.
Application	Optionally, select one or more Designer applications on which to focus the report.

Attributes used in the Milestone Path Analysis Dashboard

The following table explains the attributes used on the Milestone Path Analysis Dashboard:

Attribute	Description
ANI	Enables data to be organized by the Automatic Number Identification (ANI), which is the number associated with the originator of the call.
Day	Enables data to be organized by day.
Start Milestone	Enables data to be organized by the name of the first milestone the call passed.
Last Milestone	Enables data to be organized by the name of the last milestone the call passed before entering Assisted Service.
Final Disposition	Enables data to be organized by the status assigned to a call when the caller exited the call flow (such as Abandoned in Self-service, Abandoned in Queue, Routed to Agent, System Error, Terminated, or Other). This status is set by the system.

Metrics used in the Milestone Path Analysis Dashboard

The following table explains the metrics used on the Milestone Path Analysis Dashboard:

Metric	Description
Session Count	The total number of sessions that encountered each milestone or milestone path.

To view more detailed information about the metrics and attributes in this dashboard, and other metrics and attributes that can be used to customize reports, see the [Genesys CX Insights Projects Reference Guide](#).