

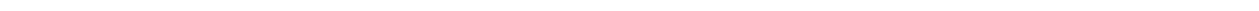


**November 2014**

Cobrowse Deployment Guide

**November 25, 2014**

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# Introduction

The purpose of the **Cobrowse Deployment Guide** is to outline the steps necessary to deploy Cobrowse as efficiently as possible. The steps in this guide focus on a deployment of Oracle Standalone Cobrowse. Most of these steps will also apply to deploying Cobrowse in an add-on to RightNow Chat, Dynamic Agent Desktop or Enterprise Contact Center. This guide does not cover the deployment of the RightNow Chat solution.

The Deployment Guide provides documentation of the configuration of the Oracle Standalone Cobrowse product and identifies the configuration alternatives for:

- Customer Launch Experience
- Agent Launch Experience
- Security Bundle
- Website Configuration
- Reporting and Administration
- Agent Setup and Privileges
- Configuration and Client Acceptance Testing
- Training

It is strongly recommended to begin the deployment process by outlining explicit and measurable objectives (examples: increase customer satisfaction scores or reduce call backs, increase first call resolution) and by recording the reporting procedures that will be used to measure performance against these goals.

**Important!** At this time, it is necessary to conduct deployment activities with the assistance of Oracle Consulting Services, a specially identified Sales Engineer, or through an Oracle Partner.

## 2

## Configuration Inputs & Decisions

The *customer launch experience* incorporates all elements that appear on-screen, from the placement of the initial launch point through the establishment of the cobrowsing session.

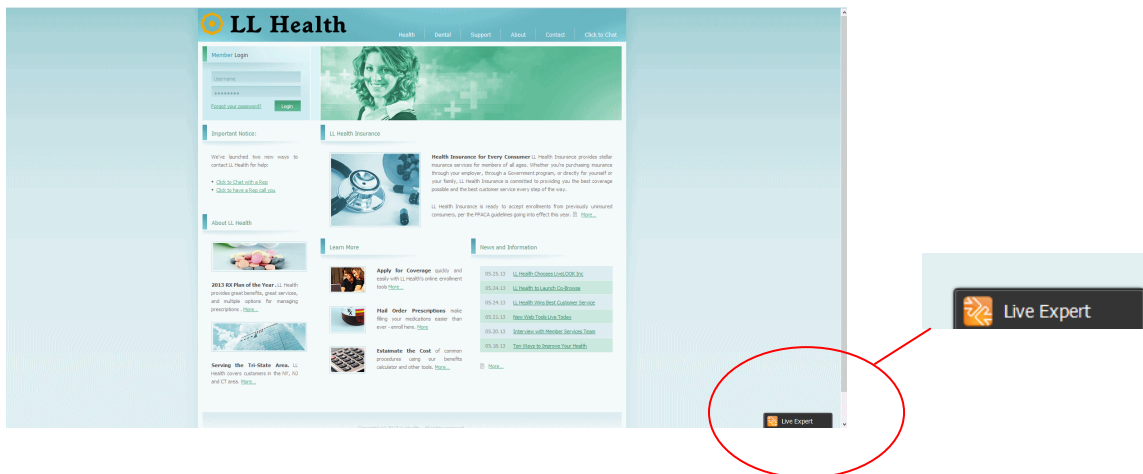
### 2.1 Launch Point Best Practices

Our best practice recommendation is to have a Cobrowse launch point hovering and present on every page of your website. Often, customers that benefit most from the cobrowsing experience are less technically savvy and require simple, easy to execute instructions. We have consistently found that being asked verbally to navigate to a non-obvious launch point, even if it's uniformly located as a small link or icon at the bottom of a page, can be difficult for some users and create a bad customer experience.

Alternately, the customer engagement window may also be launched from a link or icon on the page if this is preferred.

### 2.2 Launch Point Placement

There are several options for how the launch button looks and where it appears on the website. Our best practice recommendation is for the **Launch Point** to appear on every page in the lower-right corner as shown below:



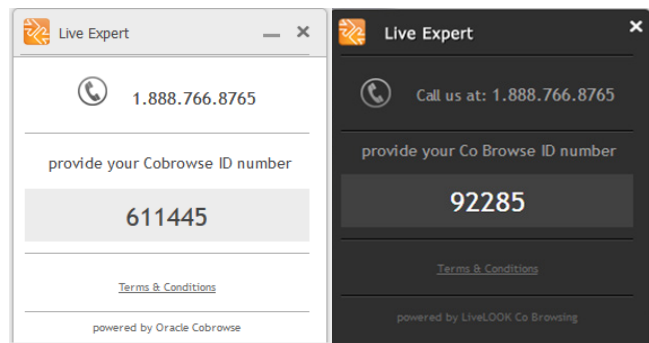
There is also an option to launch Cobrowse sessions from an icon or link created by the company, which can be deployed so that it only appears on specific web pages. To deploy with a launch icon or launch link of your choice instead of the default hovering button above, the launch point ID must be configured by the deployment team.

### 2.3 Standard Launch Engagement

Whether launching from the standard button, a custom icon or link, when a session is launched, engagement windows are displayed. These can be configured as follows within a **black** or **white** template.

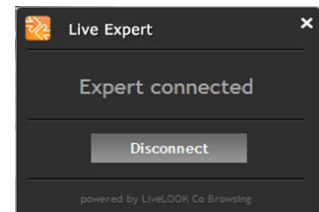
The **recommended** *Number Generation Window* configurable areas are:

- “Live Expert” – text
- Close icon image
- Phone icon – change or remove
- Phone number – change or remove (one phone number only)
- “provide your Co-Browse ID number” - text
- “Terms & Conditions” link - text, URL



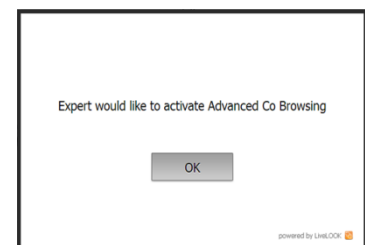
The **recommended** *Expert Connected State Window* configurable areas are:

- “Live Expert” text
- Close icon image
- “Expert connected” - text



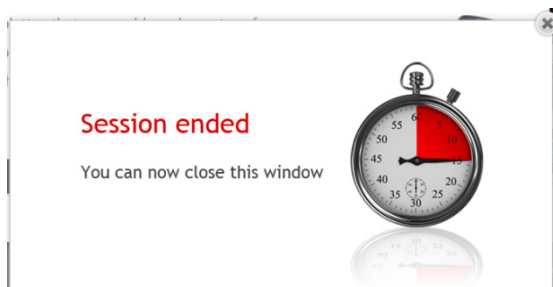
The *Escalation to Advanced Mode* prompt dialog

- Text



## 2.4 Session Close

When escalation to Advanced Cobrowse mode is used, closing this toolbar or the minimized access code window will end the session and trigger the following message.



## 2.5 Agent Launch

Agents can launch Oracle Standalone Cobrowse via an “agent Widget” that appears as an icon on the Agent’s system tray. Clicking on the icon will launch the Agent Console login or, if the agent has already logged on, the Agent Console will launch ready for an access code.



Figure 1: Launch icon in system tray

The agent remains logged in and active as long as the browser is open. Multiple agents may join a customer session and sessions may be transferred between agents.

The widget may be installed through the URL: <http://www.livellook.com/widget.aspx>

Additionally, Agents can access the Agent Console via URL, which can be bookmarked or embedded within existing Agent Desktops and workflows.

The Agent Console URL: [www.livellook.com/welcome/join.aspx](http://www.livellook.com/welcome/join.aspx)

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## Security & Privacy Options

Security and privacy options are handled differently within the two modes of Oracle Standalone Cobrowse:

1. **Instant Mode:** only website content tagged with Cobrowse Javascript can be viewed by the Agent. For any content that includes sensitive customer data, the Cobrowse script can be omitted to prevent the Agent from viewing these pages. Additionally, field blocking can be applied to prevent viewing sensitive form fields during a Cobrowse session (examples: credit card numbers, social security numbers, etc.)
2. **Advanced Mode:** in Advanced mode, any combination of website and desktop content can be visible to the Agent. This is not limited to website pages tagged with Cobrowse Javascript, but is controlled within the configuration.

In this section, we will cover security and privacy options for the *Advanced Mode*.

The default mode for Oracle Standalone Cobrowse is to enable the agent to see the entire desktop of the host and to be able to take full control of the host PC.

This default behavior may be limited as follows:

### 3.1 Limit Agent Control

The agent may be assigned the following access controls:

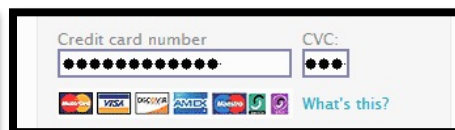
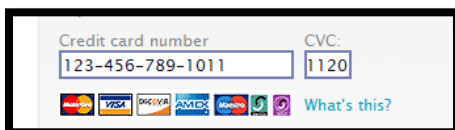
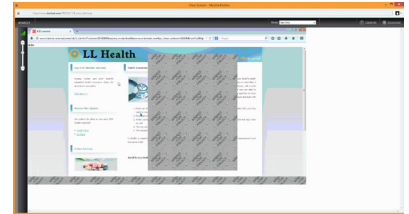
- **View only:** the agent has the ability to see the customer's screen, but cannot perform any actions on the customer's screen.
- **View + point:** the agent has the ability to see the customer's screen and can utilize a labeled mouse pointer to show the customer things on the screen.
- **View + guide:** the agent has the ability to see the customer's screen and controls the customer's mouse pointer to move the customer through a process, but cannot execute clicks.
- **Remote control:** the agent has the ability to see the customer's screen, control the customer's mouse and control the customer's keyboard, including executing clicks and typing on behalf of the customer. Remote control access can be suspended on specific pages (e.g., order submission pages, password reset pages, etc.)



### 3.2 Limit Agent View

The agent may be limited to be able to only view any combination of the following content:

- Browser only: All other applications and the desktop will be masked. The mask is a grey background with wording “masked for privacy”.
- Limited to specific URLs or Web page titles: An example is URL limit to `http*://*.Company.com`.
  - Blocked URLs within the permitted range: Within a permitted range of viewable URL's, a specific URL may be blocked. For example, a page where security settings are set up may not be appropriate for an agent to view. These specific URLs may be blocked. For example: `https://www.Company.com/authentication_setup`.
- Limited to specific desktop application titles: these are identified by process names. An example is limiting to PDF readers or Internet Settings windows.
- Blocking specified page fields: The agent may be prevented from seeing specific fields (SSN, credit card number, etc.). This requires the Deployment Team to provide code that is placed on pages that require field masking. Required input to configure field blocking is a full bitmap image of the page (.bmp file with no compression) and the html field tag used.
  - Javascript will need to be added to pages where field masking is required
  - The field that needs to be blocked will have to be identified either by:
    - Field class attribute assigned by the company (preferred)
    - Identify the field name of each field that must be masked
  - The border around the field that must be masked is slightly adjusted in color, enabling the Cobrowse solution to identify it as a masked field



## 4

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# Agent and Customer Surveys

Oracle Standalone Cobrowse includes a post-cobrowse survey mechanism for both customers and agents that requires no additional code. There is a URL presented in the “Session Ended” window enabling the participants to complete the survey.



### 4.1. Agent Survey

Here is an example “agent survey”. The questions may be customized many ways depending on the goals of the pilot. [https://livelook.qualtrics.com/SE/?SID=SV\\_2fsUuliHuRgfxXe](https://livelook.qualtrics.com/SE/?SID=SV_2fsUuliHuRgfxXe)

Agent Survey Questions	Answers
Were you able to connect to the customer and see his or her screen?	Yes / No
How satisfied were you with your ability to help the customer with Cobrowse?	5 point scale Not Satisfied to Extremely Satisfied
How likely are you to recommend Cobrowse to your colleagues and co-workers?	5 point scale; Not Likely to Extremely Likely
Would you proactively ask your customers to use the Cobrowse service?	Yes / No

## 4.2 Customer Survey

Here is an example “customer survey” [https://livelook.qualtrics.com/SE/?SID=SV\\_8cXrUpds5biyZ7K](https://livelook.qualtrics.com/SE/?SID=SV_8cXrUpds5biyZ7K)

Customer Survey Questions	Answers
How satisfied were you with your ability to get help using Cobrowse?	5 point scale Not Satisfied to Extremely Satisfied
How satisfied were you with the Cobrowse ease of use?	5 point scale Not Satisfied to Extremely Satisfied
How likely are you to recommend Cobrowse to your friends as a way to work with (client)?	5 point scale Would Not Recommend to Extremely Likely

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## Configuring Domains for Deployment

The deployment of Oracle Standalone Cobrowse takes place in three steps:

1. Set up a development / test environment to build out, test and approve the user interface and security bundle configurations that will be deployed in production.
2. The Deployment Team will then provide JavaScript code that will be used in production. This code should be tested in a test environment to ensure it is working properly.
3. Deploy the approved code from step 2 in production.

### 5.1 Set up Initial Development and Test Environment

The objective of this step is to develop, test and approve the user interface configuration and security bundle configuration of the application.

The Deployment Team will then review the deployment with you to ensure it is correct. This will save test time cycles in the long run. The Deployment Team will need to know prior to the meeting:

- Each domain where JavaScript was installed
- Verification that there are no untagged domains in the environment

The Deployment Team will need to know the complete list of domains that are “tagged” to complete the configuration on Oracle Standalone Cobrowse.

### 5.2 Configure UI and Security Bundle

The Deployment Team will configure the application per inputs from sections 3 and 4 above. Approval will be required for these configurations in order to move to step 2 of the deployment process.

### 5.3 Place Launch Code

The Deployment Team will provide JavaScript which should be accessible through HTTP/HTTPS.

Include JavaScript code where Cobrowse should be placed unconditionally on every page that needs to be cobrowsed in each domain. The code also provides for the launch point. Best practice is to put this code in a common header / footer. Example:

```
<script type="text/javascript" src="https://17be418f2dd110f26041-631cc621b1140045e77e413cd09d5315.ssl.cf2.rackcdn.com/llscripts//launcher.js"></script>
```

*This is example code. The actual code will be constructed through the Administration Console by the Deployment Team.*

If Cobrowse is configured to launch from an icon or link on the page, the icon or Link ID needs to be provided to Deployment Team and included in the configuration. No link is directly configured in order to make UI appear on the page. The Deployment Team will need to configure the link or icon ID for the launch point to work.

Launch code example:

```
<script type="text/javascript" src="https://17be418f2dd110f26041-631cc621b1140045e77e413cd09d5315.ssl.cf2.rackcdn.com/llscripts//launcher.js"></script>
```

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## Agent Identification and Privileges

### 6.1 Standard Agent Account Setup

The current format for agent provisioning is to provide the Deployment Team with a Word table or Excel spreadsheet.

**The required fields are:**

- First Name
- Last Name
- Email Address (login name)

**Optional fields are:**

- Phone
- Agent manager identifies managers able to see session reports of all agents
- Department groups agents and managers into a sub-organization structure as appropriate

### 6.2 SSO Integration (Optional)

Oracle Standalone Cobrowse supports acceptance of a SAML 2.0 compliant ID federation. This permits use of internal standard login and password to access the Cobrowse application. This normally is not implemented for a pilot deployment but can be implemented for a production roll out.

It is assumed that access authorization will be managed and SAML ID federation permitted only after the user is authorized. This eliminates any need to maintain a list of authorized users in the Oracle Standalone Cobrowse environment.

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## Configuration and Client Acceptance Testing

During the development phase, the Deployment Team configures the Oracle Standalone Cobrowse to meet client requirements with testing to confirm. It is expected that customers will also review and test the application to ensure it complies with the requirements. There are also several technical checks that should be made in order to ensure that the applet works within the enterprise environment.

### 7.1 Enterprise URL Filtering

If using URL filtering and permitting only selected URL's for access inside the enterprise, then two product-related URL's need to be added to the authorized list:

- \*.livelook.com
- \*.livelook.net

### 7.2 Configuration Approval

The Deployment Team will set up the configurations for review and testing. This will be done via a demonstration page.

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## Training

Standard Training includes a PowerPoint presentation that reflects all of the configurations required. This permits a high level of fidelity to the materials that are relevant to agent training.

**Optional training includes:**

- *Remote Training.* Typically 60 minutes in duration, a product trainer will conduct training for a group of agents remotely.
- *On-Site Training* as needed.



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## Appendix

The two “modes” of Oracle Standalone Cobrowse are defined as:

### Instant Mode

This is the first mode attempted when starting a Cobrowse session. This mode utilizes HTML technology to connect instantly. This mode will support many environments and use case scenarios; however, in cases where the Instant Mode is not compatible or is insufficient, Advanced Mode is activated.

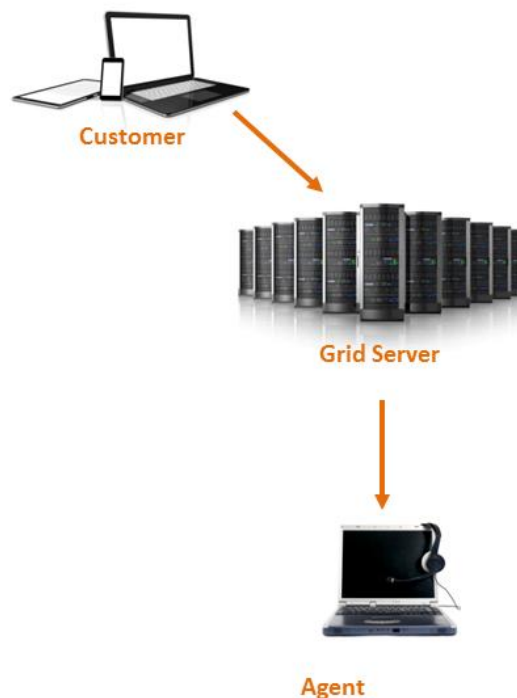
### Advanced Mode

This mode is activated from within an active session, or a session can be started in Advanced Mode if Instant Mode is not supported. Advanced Mode supports all types of rich web technologies and cobrowsing of off-browser and third party web content.

### Session Setup and Flow

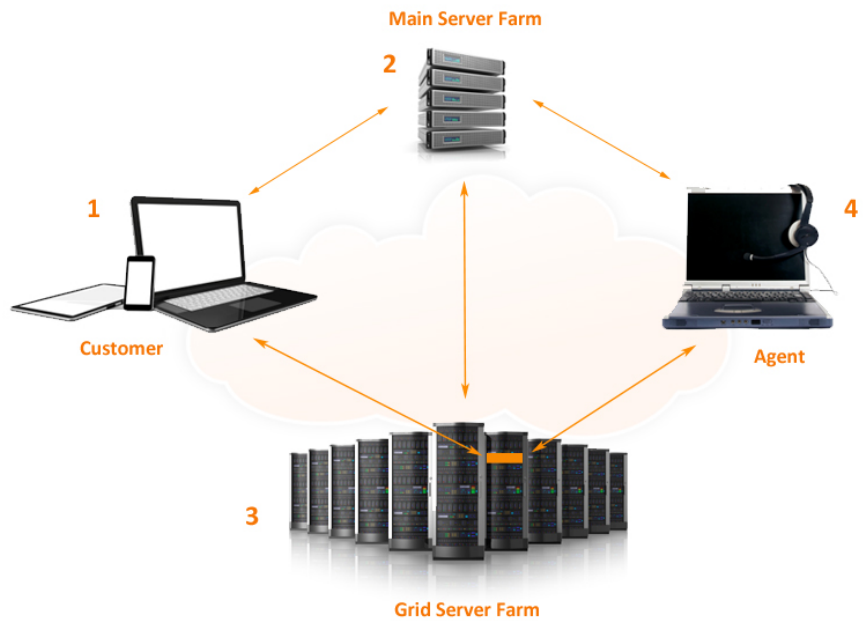
#### Instant Co Browse mode

1. Cobrowse engine, written in JavaScript, collects a URL and page contents (including dynamic content like pop-ups, radio boxes, check boxes, etc.)
2. Sends data to the Grid Server via a secure websocket connection.
3. The agent’s browser retrieves this data via the same secure websocket connection and renders the contents received to an HTML page
4. Ongoing data is captured and sent, including mouse moves, clicks, and keyboard events



### Advanced Cobrowse Mode

Session setup is performed by the main server. A client (1) clicks on a request to activate Advanced Mode. The main server (2) also assigns the advanced session to a grid server (3) that will actually conduct the session. The session then connects between client and agent (4) through the assigned grid server. The main server manages session assignment load on grid servers and collects control and event data from the grid servers.



Or, if environment does not support launching in ICB mode, Connect in Advanced Mode

Session setup is performed by the main server. A client (1) clicks on a co-browse launch point and generates an access code generated by the main server farm (2). The main server also assigns the session for that access code to a grid server that will actually conduct the session. The agent (4) enters the access code received over the phone from the client into his agent console window. The main server then directs the application to use the assigned grid server. The session then connects between client and agent through the assigned grid server. The main server manages session assignment load on grid servers and collects control and event data from the grid servers.

## Browser Requirements

### Customer

#### **For ICB Mode:**

An HTML5-compliant browser (Firefox 4.0+, Google Chrome 4.0+, IE 10.0+, Safari 6.0+), or IE8.0 or newer

#### **For Advanced Mode:**

#### **Windows**

Browser: Firefox, Chrome, IE 7.0 or newer

For Windows XP and below: browser plug-in is required (Java 1.5 or newer, ClickOnce .NET 2.0 or higher).

For Windows Vista and above Java or ClickOnce are not required.

#### **Mac**

OS: Mac OS X 10.6.8 or newer

Browser: Safari 5.5 or newer

Java: 1.5 or newer

### Agent

#### **For ICB Mode:**

HTML5-compliant browser  
(Firefox 4.0+, Google Chrome 4.0+, IE 9.0+, Safari 6.0+, Opera 11.0+), no additional plug-ins required

#### **For Advanced Mode:**

The browsers listed for ICB, or

IE 8.0+ with Adobe Flash 10.0+, or

IE 8.0+ with Java 1.5 or newer

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