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Standalone Cobrowse User Guide

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Introduction

The purpose of the **Standalone Cobrowse User Guide** is to outline the process and best practices around the use of Cobrowse during customer interactions. While the process of Cobrowsing with customers is similar for all companies, it is highly encouraged that each company thoroughly document its unique use cases and develop agent scripting to support the Cobrowse strategy.

For information about deployment and administration of Oracle Standalone Cobrowse, please see the [Deployment Guide](#) and [Administrative Guide](#).

2

Agent Login

Agents can launch the Oracle Standalone Cobrowse Agent Console 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.livelook.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.livelook.com/welcome/join.aspx

The option to support SSO is also available.

Launching a Standalone Cobrowse Session

When a Customer calls to speak with an Agent, the Agent may determine that the customer's issue would be solved more quickly or efficiently if the Agent could see the Customer's screen.

Using approved agent scripting, the Agent invites the Customer to start a Cobrowse session (e.g., "Let's start a Cobrowse session so I can walk you through this more quickly.")

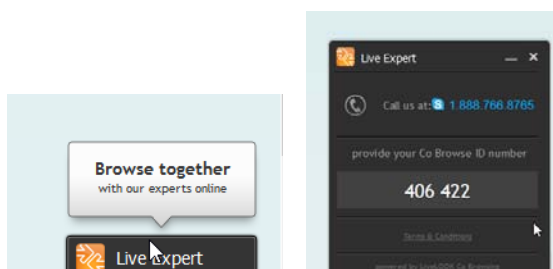
1. The Agent asks the customer to click the Cobrowse button on the website

This can be displayed as a hovering button (best practice), a link, or an icon. It can be displayed on every page of the site (best practice) or displayed on a contact page. The button is branded and the text displayed may read "Cobrowse", "Live Help", or whatever the company has chosen as the label for this button.

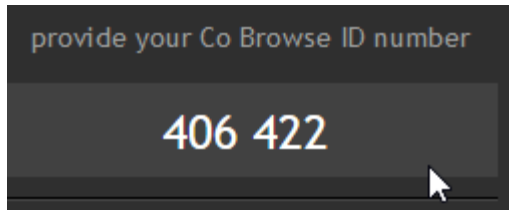


2. The Customer clicks the Cobrowse button on the website

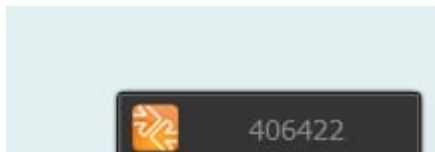
Additional messaging appears when the customer hovers over or clicks on the Cobrowse button.



3. **The Agent asks the Customer to read the 6-digit Session ID code displayed in the Cobrowse window.**



The Cobrowse window minimizes automatically after a few seconds, but the 6-digit code remains visible to the Customer.



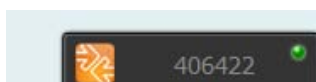
4. **The Agent enters the 6-digit Session ID code into the Agent Console**



The Agent's name is displayed automatically after the first time the Agent enters it into the Agent Console. The agent clicks **Connect** to start the Cobrowse session.

5. **The session is connected.**

The customer can see that the session is connected by the green dot that appears on the Cobrowse button.



4

Cobrowsing With a Customer

While cobrowsing with a customer, Agents can use the controls and information in the Agent Console:

1. The **Session ID code** displays so that additional Agents or subject matter experts can be asked to join the active session if needed
2. The **status** of the session connection displays, alerting the Agent to any connectivity issues that may cause the session to proceed slowly or cause disruption
3. The **URL** of the web page the customer is currently viewing
4. The “**Modes**” drop down window (see explanation of Modes below)
5. The “**Advanced Mode**” escalation button (see section 5)
6. The **Client Info** link will give the Agent information about the Customer’s environment, like the operating system they are using, which can sometimes be helpful if troubleshooting a technical problem
7. **Disconnect** from the session



What the Agent can Do (Modes)

The agent may be assigned the following access controls, which are selected from the “Modes” drop-down menu in the Agent Console during a Cobrowse session. Not all agents have access to all modes. Only the modes assigned to the Agent will display as control options during a Cobrowse session.

- **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.

5

Escalating to Advanced Cobrowse Mode

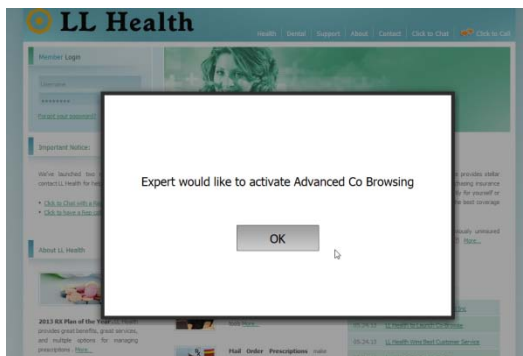
In certain cases, an Agent will need to escalate to Advanced Cobrowse Mode in order to assist a Customer. Reasons to escalate to Advanced Mode include:

- The need to see content that resides outside of the corporate website pages visible in Instant Mode (e.g., a desktop application, a document, a third-party resource website, etc.)
- On-page elements are not displaying properly in Instant Mode (e.g., Flash, dynamic content, Silverlight, etc.)

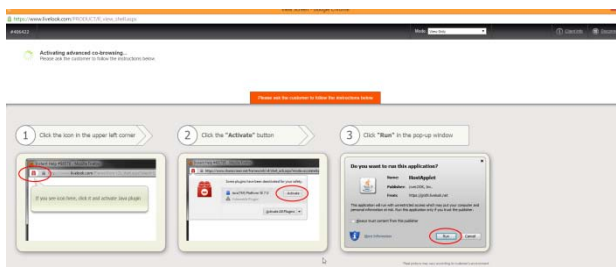
To escalate to Advanced Mode, the Agent clicks the “Advanced Mode” button on the Agent Desktop.



An invitation is sent to the Customer to activate “Advanced Mode”



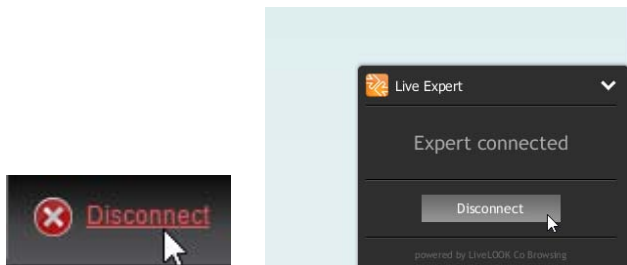
Instructions will appear in the Agent Console to help the Agent guide the Customer through any next steps that might be necessary to activate Advanced Mode. Advanced Mode utilizes one of three technologies to run, depending on the Customer’s environment, including Java which may require the Customer to activate it within the browser.



6

Ending a Cobrowse Session

Both the Agent and the Customer can end a Cobrowse session at any time. To end a session, Agents can click the “Disconnect” button at the top of the Agent Console. Customers can click the “Disconnect” button on the Cobrowse button displayed on the screen.



Oracle Standalone Cobrowse includes an option to display a post-cobrowse survey to both customers and agents. There is a URL presented in the “Session Ended” window enabling the participants to complete the survey.



7

User Reports

Log in to the Agent Console to access User Reports.

<http://www.livelook.com/mycabinet.asp>

Click the My Reports link to view reports that outline the number of sessions run, the number of total minutes, and information on each session, including:

- The session number
- The start time
- The total minutes of the session
- The login name associated with the session
- The agent name as entered into the Agent Console for the session

This data can be exported and sorted at any time.

8

Additional Resources

If Support is needed, visit <http://www.oracle.com/us/corporate/acquisitions/livelihood/support/index.html>
