Oracle Service Cloud
Administering Standalone Cobrowse

19A

ORACLE

Oracle Service Cloud
Administering Standalone Cobrowse

19A

Part Number: F10636-01

Authors: The Service Cloud Information Development Team

Contents

Preface

This preface introduces information sources that can help you use the application and this guide.

Using Oracle Applications

To find guides for Oracle Applications, go to the *Oracle Help Center*.

Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the *Oracle Accessibility Program website*.

Videos included in this guide are provided as a media alternative for text-based topics also available in this guide.

Contacting Oracle

Access to Oracle Support

Customers can access electronic support through Oracle Support. For information, visit *Oracle Service Cloud Support* or visit *Accessible Oracle Support* if you are hearing impaired.

Comments and Suggestions

Please give us feedback about Oracle Applications Help and guides. You can complete one of the following surveys:

- For guides: *Oracle Service Cloud Documentation Feedback*.
- For tutorials: *Oracle Service Cloud Tutorial Feedback*.

1 Cobrowse Accessibility

Cobrowse Accessibility

Cobrowse is natively accessible, and does not require any specialized configuration or setup to enable accessibility.

2 Cobrowse Account Administrator Overview

Overview: Cobrowse Account Administrator Guide

The purpose of this guide is to outline the functionality of the Cobrowse Administrative Console, covering all functions necessary to administer the Oracle Cobrowse account.

Throughout this guide and throughout the Admin Console interface, you may see references to “LiveLOOK”, the legacy name of the product now referred to as Oracle Cobrowse.

3 Accessing the Admin Console

Log In to the Admin Console

The Cobrowse Admin Console is a stand-alone user interface used to manage the Oracle Cobrowse product, enabling administrators to add and edit users, manage sub-companies and access Cobrowse reports.

1. Go to *mylivelook.com*.
2. Enter your login and password.

   The Welcome screen of the **Admin Console** opens. You may occasionally see notifications of upcoming events or other important information from Oracle on this screen.

4 Working with Companies

Select a Company

Select the company you want to work with.

When logged in, you are automatically placed into your top-level company. If the company has sub-companies set up (to manage multiple deployments across geographic regions or product lines, for example), you can use the Select Company tab to work within a different company.

1. Click **Select Company**.

   A search window appears, with your top-level company name highlighted in the list of companies.
2. To select a sub-company, click the plus sign (**+**) next to a company to view all sub-companies and highlight your selection.
3. To search for a company, select the search criteria from the drop-down menu next to the search field. Your search options are Company Name, Company ID, SiteID, Customer Account #, and Subscription ID.
   a. To search by company name, enter at least 3 characters of the company name and press Enter. You can use an asterisk (*****) as a wildcard.
   b. To search by ID number, enter the first six digits of the company ID and press Enter.
   c. To search by SiteID, enter the first 4 digits and press Enter.

Create a New Company

Follow this procedure to create a new company.

1. Click **Company Set Up**.
2. Click **Company Management**.

   The **Company Management** window opens.
3. Click **Create New Company**.
4. Enter the field information for creating a new company described in the following table.

Field	Description
***Company/Department Name**	Enter the company or department name.
***Company URL**	Enter the company URL.
Expiration Date	The expiration date is set automatically and cannot be edited.
Account Type	Click this drop-down menu to select an account type. Options are **Free Trial**, **Paid Account**, or **Canceled Account**.
Remote Options	Click this drop-down menu to select remote options. Remote options define an agent's control over a customer's mouse and keyboard.

Field	Description
View and Point	With this option selected, agents can select View Only to view the active window (this option is selected by default in Advanced mode), View + Pointer to view the customer's active window and use a labeled mouse as a pointing device on the customer's screen (this option is selected by default in Instant mode), and View + True Pointer to view the customer's desktop and control the movement of the customer's mouse or other pointing device (only available in Advanced mode).
Remote Control	With this option selected, agents can select View Only to view the active window (this option is selected by default in Advanced mode), View + Pointer to view the customer's active window and use a labeled mouse as a pointing device on the customer's screen (this option is selected by default in Instant mode), View + True Pointer to view the customer's desktop and control the movement of the customer's mouse or other pointing device (only available in Advanced mode), and Full Control to view the customer's active window, control all mouse or other pointing device functions (pointer and mouse clicks), navigate to other company web pages, use their keyboard to enter information on the customer's active window and, in Advanced mode, access the customer's desktop and cobrowse third party sites.
Number of Seats	Enter the number of seats for the company.
Create In Root	Select this check box to create the company as a new top level company.

Related Topics

Edit a Company

Follow this procedure to make changes to a company.

1. Click **Company Set Up**.
2. Click **Company Management**.
3. Click **Edit** for the company you want to edit.

   An edit window opens.
4. Make any changes and click **Save**.

5 Managing Permissions

Overview: Permissions

Permissions regulate access to the Administrative Console functionality.

There are four predefined permission groups for every new company. These groups cannot be edited or deleted.

- Users: can see session reports and/or change personal information.
- Account Managers: have all functions available for Users, plus can view administrative functionality without the ability to make modifications.
- Account Administrators: have all functions available for Account Managers, plus can manage companies and users. Account Administrators can add users to any permission group, including Account Administrators and Configuration Administrators.
- Configuration Administrators: have the highest permission level with all functions available for Account Administrators, plus can configure Cobrowse deployment. This permission can be assigned to an internal or external resource for configuration and implementation of the company's Cobrowse deployment. Configuration Administrators can add users to any permission group, including Configuration Administrators.

6 Managing Users

Overview: Managing Users

Manage users with the functions in the User Set Up tab. You can edit your own user information, add and edit users, and select permissions.

Note: This section is specific to Standalone Cobrowse. For Cobrowse added on to an Oracle platform (Oracle Service Cloud or Engagement Cloud), see product documentation for the agent desktop to learn more about user management.

The My Profile page contains your information. This page shows the same user data regardless of the company or sub-company selected. You can change the following information on the My Profile page:

- First name
- Last name
- Contact information
- Password

The User Management page contains user information for the company currently selected. You can do the following on the User Management page:

- Search for users
- Add new users
- Edit users
- Delete users

The Permissions page lists the permission groups for your company. Every company has four predefined permission groups.

Edit My Profile

Follow this procedure to edit your profile on the My Profile page.

1. Click **User Set Up**.
2. Click **My Profile**.

   The **My Profile** window opens.
3. Edit the My Profile field information described in the following table.

Field	Description
Company/Department Name	Your top-level company appears and cannot be edited here.
Login Type	Login type is Reg by default for an administrator, though if your company is configured for Single Sign-On (SSO) then the SSO option is enabled. This cannot be edited here.

Field	Description
Reg	With this option selected, the Login (Email) field contains your email that you use to login to the Admin Console or Agent Console. Login (Email) is unique within the database, so no two Reg users can have the same login (email) even if they are under different companies.
First Name	Enter your first name. This is a required field.
Last Name	Enter your last name. This is a required field.
Contact phone|Ext	Enter your contact phone information.
Login (Email)	As a Reg user, the Login (Email) field contains your email that you use to login to the Admin Console or Agent Console. You cannot edit this field.
Enter New Password	To create a new password, enter it in this field.
Re-type New Password	Re-enter your new password.

Edit a User

Follow this procedure to edit a user.

Before editing a user, you must select the company of the user.

1. Click **User Set Up**.
2. Click **User Management**.

   The **User Management** window opens.
3. Search for the user by entering information in the search fields and clicking **Apply Filter**, or by clicking on the sort arrows next to the user fields.
4. Click **Edit** on the user's row.
5. Edit the User Management field information described in the following table.

Field	Description
Company/Department Name	The company you are working with appears and cannot be edited here.
Login Type	Login type is Reg by default for an administrator, though if your company is configured for Single Sign-On (SSO) then the SSO option is selected.
Reg	The Reg login is the default login type.
SSO	SSO agents are set up with the SSO login type as new users and log in with an SSO.
First Name	Enter the user's first name. This is a required field.

Field	Description
Last Name	Enter the user's last name. This is a required field.
Contact phone|Ext	Enter the user's contact phone information.
Login (Email)	Enter the user's email. This field only appears with the Reg login type. Login (Email) is unique within the database, so no two Reg users can have the same login (email) even if they are under different companies.
Login	Enter an alphanumeric login for the user. This field only appears with the SSO login type. The login must be unique to the company.
Email	Enter an email for the user. This field only appears with the SSO login type. SSO allows for multiple instances of the same email address.
Enter New Password	To create a new password, enter it in this field. This field only appears with the Reg login type.
Re-type New Password	Re-enter the new password. This field only appears with the Reg login type.
Permissions Group	Select a permissions group for the user. This field only appears with the Reg login type. All SSO users are assigned the User permission group automatically.
Move user to	To change the company of the user, select a company from the drop-down menu and click **Move**.

6. Locked users will have a lock icon in the lock column. These users cannot log in to their accounts and therefore cannot cobrowse with customers. Click on the lock icon to unlock the account.
7. Click **Save**.

Related Topics

- Overview: Permissions
- Select a Company

Add a User

Create new users and the information associated with them.

Before adding a user, you must select the user's company.

1. Click **User Set Up**.
2. Click **User Management**.

   The **User Management** window opens.
3. To add a new user profile, click **Add New User**.
4. Edit the User Management field information described in the following table.

Field	Description
Company/Department Name	The company you are working with appears and cannot be edited here.
Login Type	Login type is Reg by default, though if the company is configured for Single Sign-On (SSO), then the SSO option is enabled.
Reg	The Reg login is the default login type.
SSO	Select this login type if SSO is enabled, and you want the agent to log in with an SSO.
First Name	Enter the user's first name. This is a required field.
Last Name	Enter the user's last name. This is a required field.
Contact phone|Ext	Enter the user's contact phone information.
Login (Email)	Enter the user's email. This field only appears with the Reg login type. Login (Email) is unique within the database, so no two Reg users can have the same login (email) even if they are under different companies.
Login	Enter an alphanumeric login for the user. This field only appears with the SSO login type. The login must be unique to the company.
Email	Enter an email for the user. This field only appears with the SSO login type. SSO allows for multiple instances of the same email address.
Permissions Group	Select a permissions group for the user. This field only appears with the Reg login type. All SSO users are assigned the User permission group automatically.

5. Click **Add**.

   An email confirmation is sent to a Login type Reg user with a temporary password and instructions on how to change it. Login type SSO users do not receive an email.

   > **Note:** If a user's password is lost, they can request a password reset by visiting *https://www.livelook.com/lost_password.asp*. An email will be sent to the user.

Related Topics

- Overview: Permissions
- Select a Company

Bulk Add Users

Follow this procedure to add multiple users to a company.

1. Click **User Set Up**.
2. Click **User Management**.

   The **User Management** window opens.
3. Click **Bulk add user**.
4. Complete the Bulk Add User fields described in the following table.

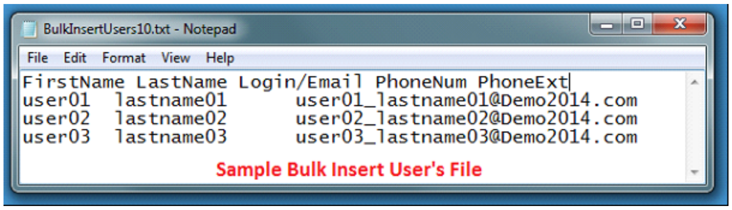
Field	Description
Login Type	Login type is Reg by default, though if the company is configured for Single Sign-On (SSO), then the SSO option is enabled.
Reg	The Reg login is the default login type.
SSO	Select this login type if SSO is enabled, and you want the agent to login with a SSO. All SSO users are Cobrowse Agents only.
Password	Leave this field blank so users can obtain passwords themselves through *https://www.livelook.com/lost_password.asp*, or enter a single password for the users. Users added through bulk adding do not receive an email to change their passwords. This field only appears with the Reg login type.

5. Click **Create Request**.

   The bulk add request appears in the request table.
6. Click **Upload/View** of the request row.
7. Click **Choose File** to select the user data file to upload.

   The file must be:
   - Tab delimited
   - UTF8 encoded to support special characters in names

- Contain a header in the first line that reads FirstName LastName Login/Email PhoneNum PhoneExt. The PhoneNum and PhoneExt fields are optional.



8. Click **Upload File**.

   A table with the added user records appears. If a user already exists in the database, the line status will read Login Exists in DB, otherwise the line status will read Inserted.
9. Click **Add Users** to confirm the upload.

   Only the person who created the request can perform the bulk add.

   The **Request** table appears. The bulk add request has a Done status, and a message appears indicating how many users were successfully added.

Related Topics

- Overview: Permissions

7 Working with Reports

Work with Reports

The Co-Browse Reporting tab contains reports for agents and administrators of the selected company as well as agents of all sub-companies.

The reports include session number, session type (Instant or Advanced), start time, end time, and agent name. User reports include only information for the user, while Company reports list data for the company as a whole.

1. Click **Reporting**.
2. To view just your own reporting data, click **User Reports**.
3. To view reporting data for the company you are working with, click **Company Reports**. See *Select a Company* to change the company you are working with.

   The **Co-Browsing Sessions** window opens.
4. Enter filtering criteria and click **Run Report**.

   The report opens.
5. Click **Export Data** to export the data in a .csv file format..

> **Note:** If a session escalates from an ICB to an ACB session, two records will be written into the report table as separate sessions.