Deployment Guide

Genesys Co-browse Sessions

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Genesys Co-browse Sessions

Contents

> ### Important
>
> Co-browse sessions are not interactions like chat and voice interactions. Co-browse sessions take place *on top* of a primary interaction like chat or voice and attach user data for reporting. Co-browse sessions do not support operations that are standard for Genesys interactions like transfer and conference.

A session is initiated when a customer requests to co-browse. The session stays idle until the agent joins. Then the session is considered to be active. The session ends when one of the parties (the customer or the agent) exits. It is not possible to re-join a co-browse session. If one party exits accidentally, a new session must be initiated. Starting with Co-browse 8.5.003, an agent is by default limited to handling one co-browse session at a time.

Session Identifiers

Each live session has two identifiers that can be used to track the session:

- Session access token (Session ID)—A sequence of nine digits that is applicable only to live sessions.
- History session identifier (UUID)—A session identifier in the database.

Starting and Stopping a Session

A co-browse session can only be initiated by a customer. An agent does not have the option or ability to send a co-browse request to a customer. This provides greater security to the customer. In order to initiate a co-browse session, the customer must already be engaged in an interaction with an agent, be it a voice call or a chat.

When the session is established, the agent's browser displays a view of the customer's browser. The view the agent sees is loaded from Genesys Co-browse Server. The agent is not a client of the website. All actions taken by the agent are passed onto and "replayed" on the customer's side.

Initiating a co-browse session from a voice call or external chat without integration

If a customer and agent are engaged in a voice call or external chat without integration, a co-browse session can be initiated by the customer if the need arises. For example, the agent might be trying to walk the customer through how to submit a specific form, but the customer is having issues understanding where the agent is directing him or her to go on the page. In this scenario, the agent might suggest they engage in a co-browse session. While the agent can verbally suggest a co-browse session, the customer is the one who must *initiate* the session.

By default, there is a "Co-browsing" button on the left side of every web page that supports co-

browsing. Note that the location on the page can vary, depending on configuration. When the customer clicks this button, they are presented with a message window asking them to confirm that they are engaged in a voice call with a representative.

Co-browse message

If the customer selects "No", a new message advises them to either initiate a voice call or a chat in order to co-browse.
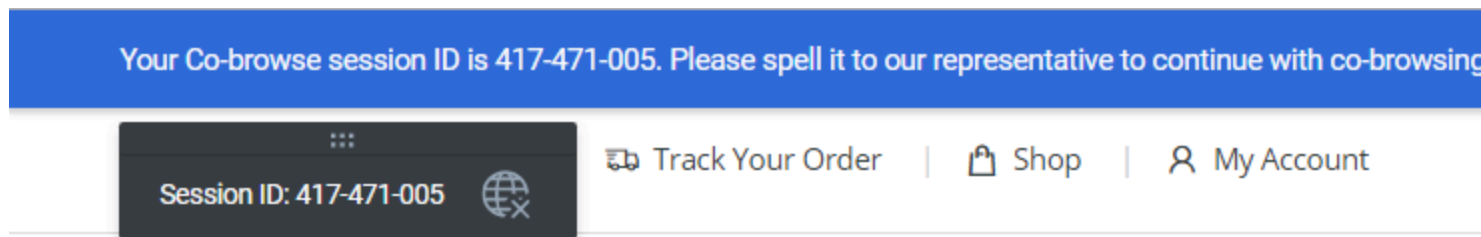

The customer must initiate a voice call or chat

If the customer selects "Yes", a numeric session identifier appears on the customer's screen.

Session identifier

This identifier can then be read to the agent over the phone or the customer might have to send the session ID through their external chat window. The agent enters the session identifier in the appropriate field in Workspace Desktop Edition, and then the customer's browser is displayed in the agent's view. There is no need to navigate to the web page the customer is viewing; the session identifier ensures the exact page is embedded in Workspace Desktop Edition for the agent. The customer is notified on his or her screen that the session has been established.
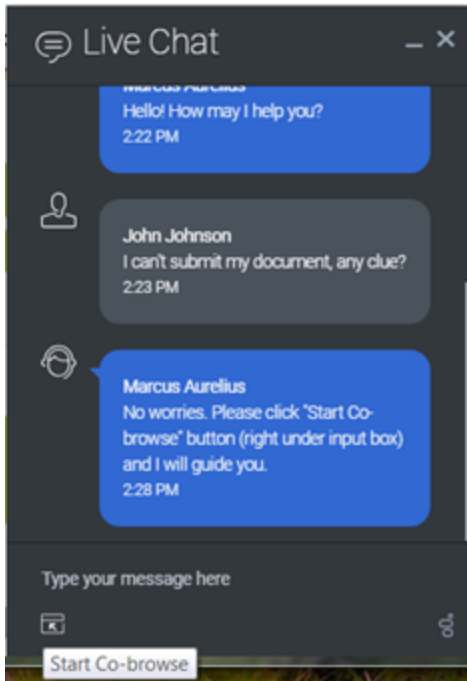

Session identifier, Agent view

Initiating a co-browse session from Genesys Widgets

A customer can also initiate a co-browse session through a Genesys Widget integrated into the website. You can enable Genesys Co-browse in several Genesys Widgets, for example:
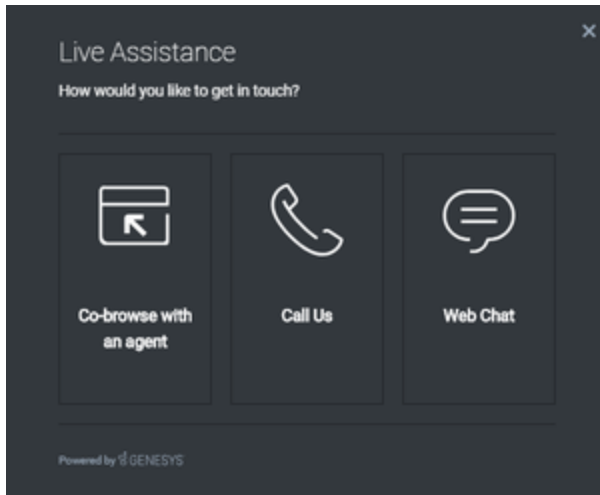
Initiating a co-browse session from the Web Chat Widget
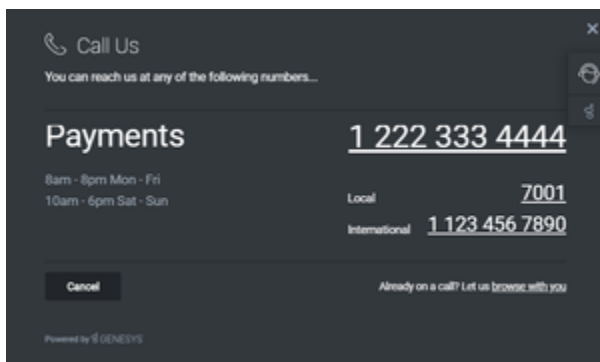

Starting a co-browse session from the
Web Chat Widget.
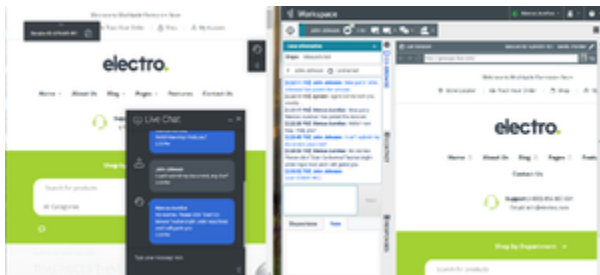
Customer and agent view of a co-browse session
started from the Web Chat Widget.

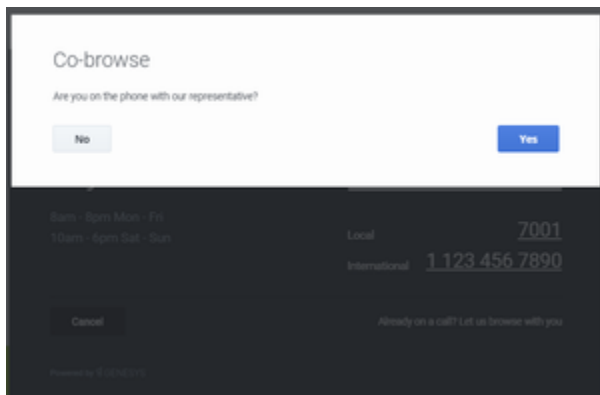## Initiating a co-browse session from the ChannelSelector Widget

Starting a co-browse session from the
ChannelSelector Widget.
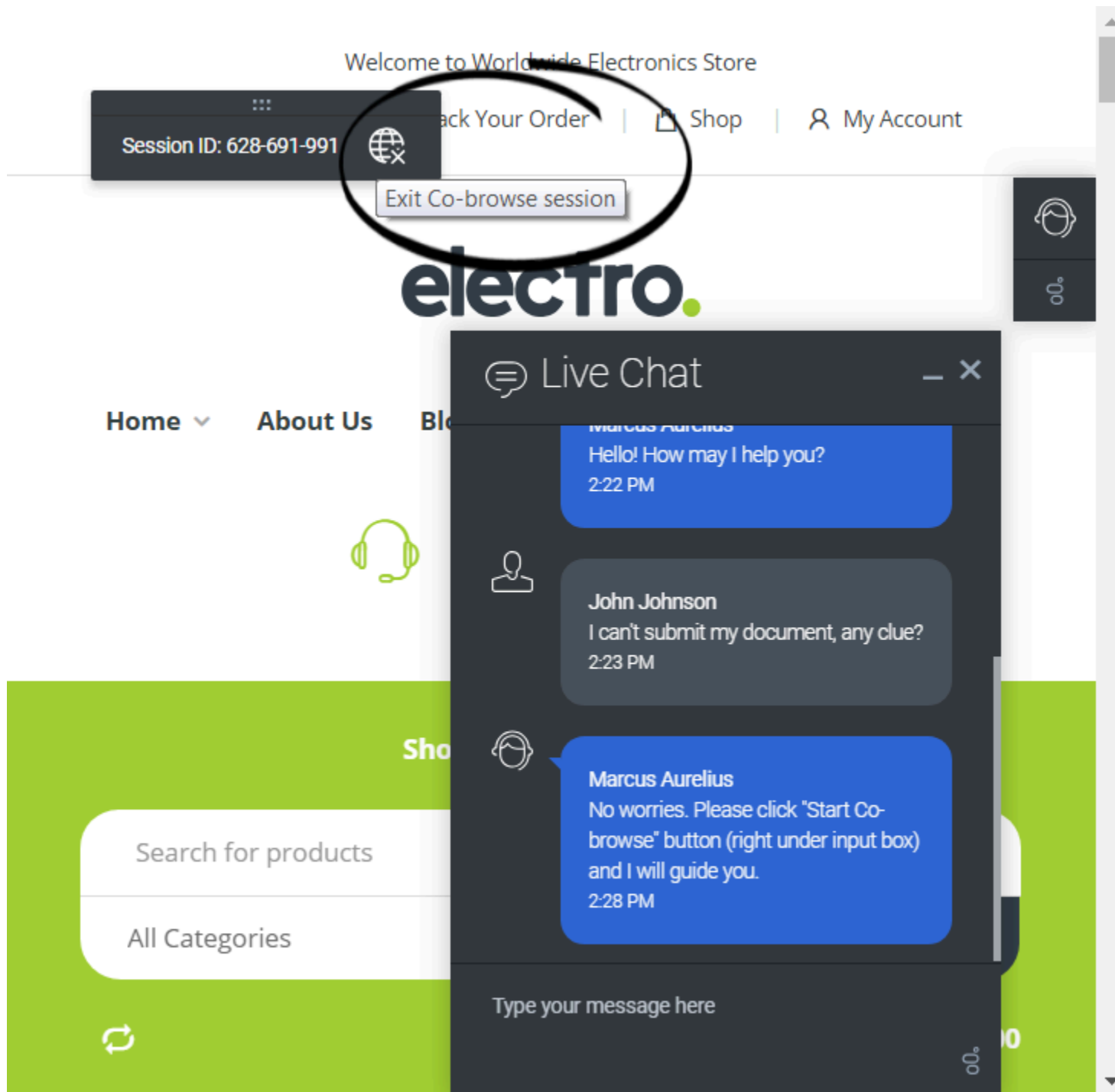
Initiating a co-browse session from the CallUs Widget

CallUs Widget with co-browse option.

CallUs Widget dialog.

Stopping a co-browse session

Once a co-browse session has been established, both parties have the ability to terminate the session. At any time, either party may click the "Exit Co-browse session" icon located next to the Session ID.

Exiting a co-browse session

The other party will be notified that the session has ended, and the agent's browser will no longer display a view of the customer's browser. Also, if the primary interaction (chat or voice call) is terminated, the co-browse session will be terminated automatically. Sessions can also terminate due to inactivity, after a pre-configured timeout expires. Likewise, if the agent closes their browser, or navigates to a third-party website, the session will terminate if the agent does not return back to the session page within the pre-configured timeout.

Once a session has been terminated, it cannot be reactivated. If the session was deactivated accidentally, a new session has to be initiated, with a new session identifier.

Participating in a Co-browse Session

Once a co-browse session begins, the agent can use his or her mouse pointer to guide the customer through the web site. Agents start co-browse sessions in *Pointer Mode*. In Pointer Mode, the customer and the agent can see each other's mouse pointer but the agent can not enter any information into the web page, click buttons, or navigate the customer's browser. If the agent needs to enter information into the web page or to navigate the browser, he or she can send the customer a request to switch the co-browse session to *Write Mode*. For more information on Pointer Mode and Write Mode, see Pointer Mode and Write Mode.

All actions (mouse clicks, key presses, and so on) are actually performed on the customer side. Any actions taken by the agent are sent to the customer's browser. This ensures a secure approach, as all browsing is done on one side—the customer's side. This approach also provides for greater performance and a more seamless customer experience. Each participant can see the other participant's mouse movements as well. This enables an agent to point to specific sections on the web page to help direct the customer through their task.

Managing the virtual browser

The size of the agent's virtual browser (a window on the agent's computer that displays the customer's browser window) matches the actual size at the customer's end. The agent can use the zoom-to-fit button to scale the display to fit in the agent's window. Or, scroll bars appear to help the agent navigate the customer's browser if their window is bigger than the agent's co-browse area.

Zoom in/Zoom out

Extra Scroll Bars

Visibility of sensitive data

Administrators can limit which fields are readable to the agent; asterisks (****) display anywhere that characters are masked. For example, administrators might choose to mask only the customer's password and social security number—or an entire page—from all agents. Images can also be masked from the agent and will display as a grayed out area. Both masked fields and images are surrounded with a purple border.

At the same time, control for some elements, like buttons or links, can be disabled. These disabled elements are surrounded with a green border. By default, all **Submit** buttons are deactivated for agents. If the agent clicks on a **Submit** button, nothing happens. The customer always has permission to submit any web forms, just as they would while browsing normally.

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Masked image

Address *

****** ******* 👁

Masked fields

First Name *

Last Name *

Disabled elements

One-Session Agent Limitation

By default, agents are prohibited from handling more than one co-browsing session at the same time. Starting with Genesys Co-browse release 8.5.003.04, you can disable one-session limitations and configure the number of simultaneous co-browsing sessions an agent can participate in with the agentSessionsLimit option in the cobrowse section of the Workspace Desktop Edition application.

When an agent is busy with a co-browsing session and a session limitation is enabled, other

customers can still start additional Co-browse sessions from their browsers but the sessions immediately end with a configurable notification explaining the agent is currently busy with another Co-browse session. See Localization to configure this message.

Note that in Workspace Desktop Edition you can override any option on the agent group and agent levels, WDE Configuration Options and Annexes.