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Deployment Guide

Install the Genesys Co-browse Plug-in for Workspace Desktop Edition

12/21/2025

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Contents

- **1 Install the Genesys Co-browse Plug-in for Workspace Desktop Edition**
 - 1.1 Installing the Genesys Co-browse Plug-in for Workspace Desktop Edition in Application Mode
 - 1.2 Installing the Genesys Co-browse Plug-in for ClickOnce/Developers Toolkit Workspace Desktop Edition
 - 1.3 Configuring Workspace Desktop Edition to allow the Plug-in to work with co-browsing
 - 1.4 Configuring Role-Based Access Control for Co-browse

Important

Genesys does not recommend installation of its components via a Microsoft Remote Desktop connection. The installation should be performed locally.

Important

For compliant versions of each component, see [Related Components](#).

Installing the Genesys Co-browse Plug-in for Workspace Desktop Edition in Application Mode

Prerequisites

- You have installed Workspace Desktop Edition in Application mode (see the [Workspace Desktop Edition Deployment Guide](#)).
- You have installed Internet Explorer 11 (not required with Genesys Co-browse Plug-in for Workspace Desktop Edition 9.0.002.40 and higher).

Installing the Genesys Co-browse Plug-in

Start of procedure

1. In your installation package, locate and double-click the `setup.exe` file. Click **Next**. The **Select Installed Application** screen appears.
2. Select your Workspace Desktop Edition application.
3. Click **Next**. The **Ready to Install** screen appears.
4. Click **Install**. The Genesys Installation Wizard indicates it is performing the requested operation for the Genesys Co-browse Plug-in for Workspace Desktop Edition. When done, the **Installation Complete** screen appears.
5. Click **Finish** to complete your installation of the Genesys Co-browse Plug-in for Workspace Desktop Edition.

End of procedure

Installing the Genesys Co-browse Plug-in for ClickOnce/

Developers Toolkit Workspace Desktop Edition

Prerequisites

- You have Installed Workspace Desktop Edition in ClickOnce or Developers Toolkit mode (see the [Workspace Desktop Edition Deployment Guide](#)).
- You have installed Internet Explorer 11 (not required with Genesys Co-browse Plug-in for Workspace Desktop Edition 9.0.002.40 and higher).

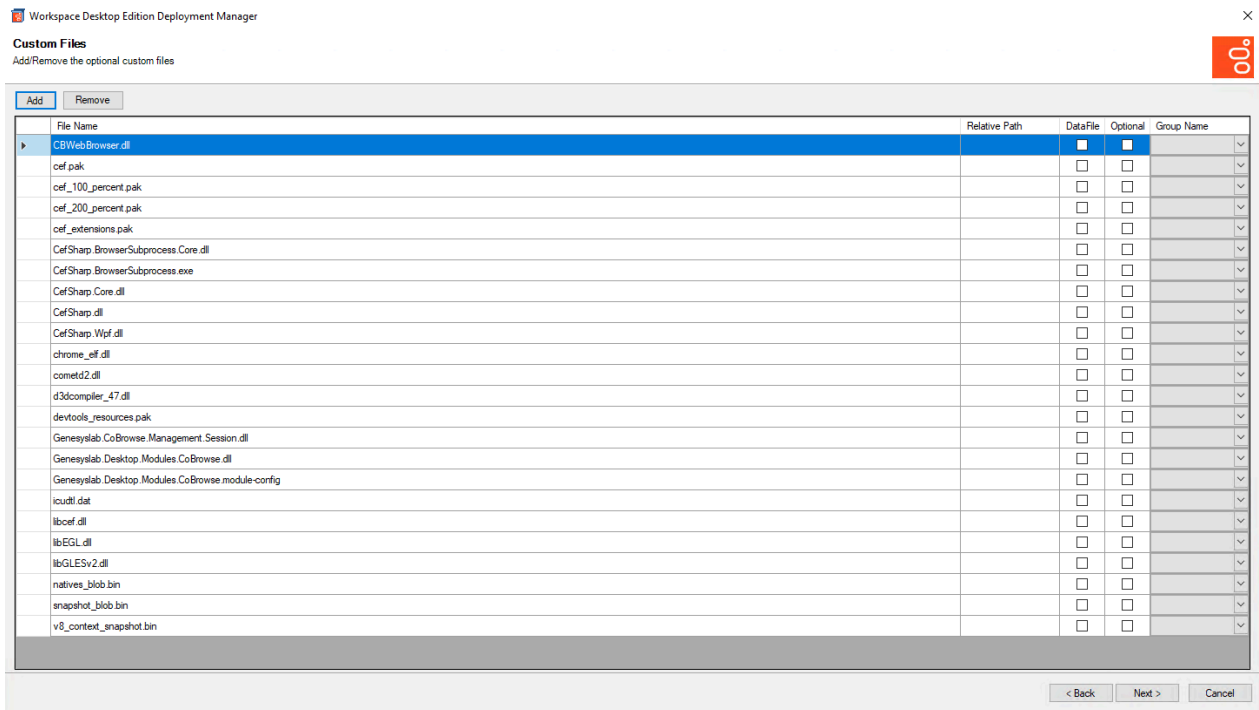
Start of procedure

1. Install the Co-browse WDE Plug-in in your WDE installation as described in [Installing the Genesys Co-browse Plug-in](#).
2. From the Start menu, open **Workspace Desktop Edition-Deployment Manager**.

Important

Starting in version 9.0.002.40, Genesys Co-browse WDE Plug-in does not support 64-bit Binary type when deploying the Workspace ClickOnce Application to your web server using Workspace Desktop Edition-Deployment Manager.

3. Click **Next**. On the next screen, check the topmost check box and click **Next** again.
4. Check the **Add custom files** check box. Note and remember the Base URL* value. This value will be used as the agent's login. Click **Next**.
5. Use the **Add** button to add to the Custom Files list all plug-in files placed in the WDE installation installation folder by setup. Leave all check boxes unchecked. Click **Next**.



6. Enter the **Config Server host**, **Config Server port**, and WDE **application name** in the Client Configuration page. Take care to enter this information correctly. Check both check boxes below the page. **Click Next**.
7. Click **Next** in the next two screens.
8. At the next screen, leave all check boxes unchecked. Click **Finish**.
9. When you see the Application Installation Wizard, click **Install**.
10. Log in an agent. You should see the WDE main window.

End of procedure

You have set up a WDE application and deployed the Co-browse WDE plug-in. You can now log in any agent using URL <Base URL*>publish.htm from any other host.

Configuring Workspace Desktop Edition to allow the Plug-in to work with co-browsing

Prerequisites

- You have installed Workspace Desktop Edition.
- You have installed the Genesys Co-browse Plug-in for Workspace Desktop Edition
- You have prepared a Co-browse Server cluster.

To configure Workspace Desktop Edition to work with Co-browse:

1. Open Genesys Administrator and navigate to **PROVISIONING > Environment > Applications**.
2. Select the Workspace Desktop Edition application.
3. In the application's **Options** section, create a cobrowse section and specify the url option in this section, see the url **option** for details.

Next Steps

- [Loading Certificate for SSL](#)
- [Configure Token-based Agent Authentication](#) (Optional)

Configuring Role-Based Access Control for Co-browse

To configure Co-browse privileges for an agent you should:

- Import the Co-browse Plug-in for Workspace Desktop Edition template.
- Configure Role-Based Access Control.

Important

Starting in version 8.5.001.09, the plug-in is shipped with the Application Template and XML metadata that provide the plug-in options to configure in the cobrowse section. The Application Template also includes the Agent - Can Monitor Co-browse privilege, a dedicated privilege that the Co-browse plug-in supports starting in this release.

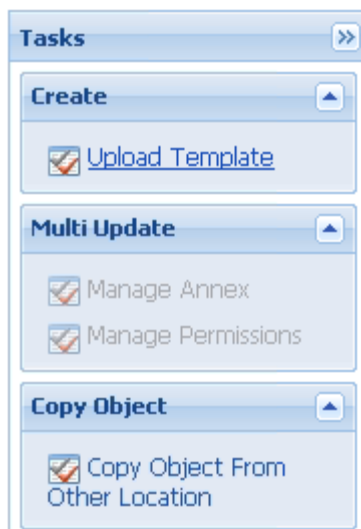
Importing the Co-browse Plug-in for Workspace Desktop Edition Template

Prerequisites

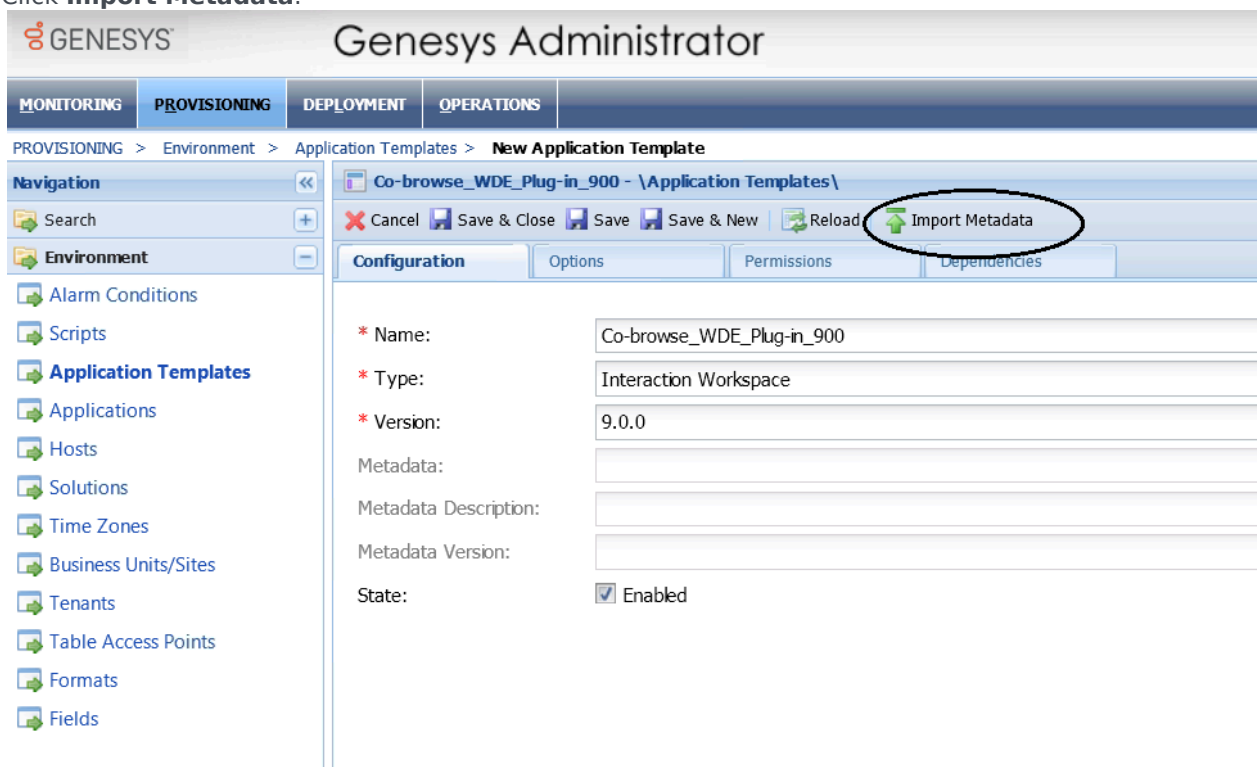
- You have [configured Workspace Desktop Edition to allow the plug-in to work with Co-browsing](#).

Start

1. Open Genesys Administrator and navigate to **PROVISIONING > Environment > Application Templates**.
2. In the **Create** menu of the **Tasks** panel, click the **Upload Template** link.



3. Click **Add** in the **Click 'Add' and choose application template (APD) file to import** dialog box.
4. Browse the Co-browse_WDE_Plug-in_900.apd file, available in the Templates directory of the plug-in installation. Click **Open**. The **New Application Template** panel opens.
5. Click **Import Metadata**.



6. Browse to the Co-browse_WDE_Plug-in_900.xml file, available in the Templates directory of the plug-in installation. Click **Open**. The metadata fields in the **Configuration** tab are now filled.
7. Click **Save & Close**.

End

Now, when you are provisioning the Privileges assigned to a Role, the list of Privileges available for Interaction Workspace (Workspace Desktop Edition) includes the privileges defined in the Co-browse Plug-in template (Workspace Desktop Edition was formerly called Interaction Workspace).

Configuring Agent Privileges to Work with Co-browse

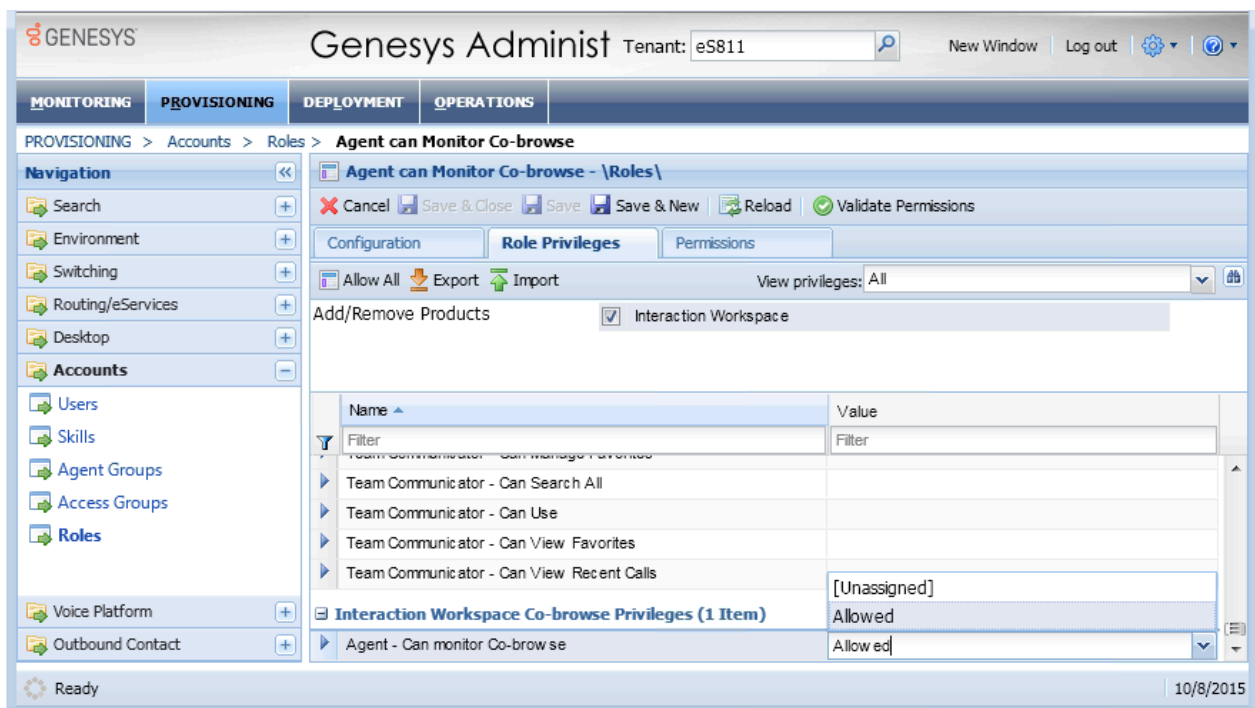
You must complete this procedure to allow specific users or groups to manage Co-browse in Workspace Desktop Edition.

Prerequisites

- You have **imported the Co-browse Plug-in for Workspace Desktop Edition Template**.

Start

- In Genesys Administrator, navigate to **Provisioning > Accounts > Roles**.
- Edit or create a Role responsible for managing Co-browse in Workspace Desktop Edition. For instance, click **New** to create the Agent - Can Monitor Co-browse role.
- Select the **Role Privileges** tab.
- In the **Add/Remove Products** top panel, enable **Interaction Workspace** (Workspace Desktop Edition) and expand the **Interaction Workspace Co-browse Privileges** (Workspace Desktop Edition) section.
- Set the Agent - Can Monitor Co-browse option to Allowed.



- In the **Members** section of the **Configuration** tab, add the users or groups who should get this role.

The screenshot shows the Genesys Admin console interface. The top navigation bar includes tabs for MONITORING, PROVISIONING, DEPLOYMENT, and OPERATIONS. The left sidebar shows a navigation tree with categories like Search, Environment, Switching, Routing/eServices, Desktop, Accounts, Users, Skills, Agent Groups, Access Groups, Roles, Voice Platform, and Outbound Contact. The main content area is titled 'Agent can Monitor Co-browse' and shows the configuration for this role. The 'General' tab is active, displaying fields for Name, Description, Tenant, and State. The 'Members' tab is also visible, showing a list of users and access groups.

Genesys Admin: Tenant: eS811

PROVISIONING > Accounts > Roles > Agent can Monitor Co-browse

Navigation

- Search
- Environment
- Switching
- Routing/eServices
- Desktop
- Accounts
 - Users
 - Skills
 - Agent Groups
 - Access Groups
 - Roles
- Voice Platform
- Outbound Contact

Agent can Monitor Co-browse - \Roles

Cancel Save & Close Save Save & New Reload Validate Permissions

Configuration Role Privileges Permissions

*** General**

* Name: Agent can Monitor Co-browse

Description: The agent is permitted to use functions of Co-browse. The other privileges of C

Tenant: eS811

State: ☒ Enabled

Members

Users:

User Name	Agent	Last Name	First Name	Employee ID	State
Supervisor	True	Sm1	Natalya	id_111_1	Enabled

Access Groups:

Name	Type	State
Users	Users	Enabled

Ready 10/8/2015

7. Click **Save & Close**.

End