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Deploying or Upgrading for Oracle
Service Cloud Integrated
Co-browse Customers

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Upgrading Integrated Co-browse

In July 2014 Oracle acquired LiveLOOK, developer of the co-browsing technology already available within the Oracle Service Cloud. The integrated co-browsing feature at the time of acquisition utilized an early version of LiveLOOK's Co-browse product, called Version 1 (v1).

In the November 2014 release of Oracle Service Cloud, enhancements to the integration were made, integrating with LiveLOOK's newest Co-browse product, Version 4 (v4) or sometimes referred to as *Co-browse Premium*. The February 2015 release of Oracle Service Cloud further enhanced the integration, adding mobile compatibility.

From the February 2015 release on, this integrated co-browsing solution, known as Oracle RightNow Cobrowse Cloud Service and sold as an add-on to Oracle RightNow Chat Cloud Service, Oracle RightNow Standard or Dynamic Agent Desktop Cloud Service and included in the Oracle RightNow Enterprise Contact Center, utilizes the most current Co-browse technology, still referred to as either v4 or Co-browse Premium.

Oracle Standalone Cobrowse Dynamic Agent Desktop Cloud Service is the stand-alone version of Co-browse, and also utilizes v4/Co-browse Premium.

There are significant differences in how these versions of Co-browse are deployed and how they function:

Version	CP Requirements	Basic Deployment Process	On-site Elements	Configuration Options	Functionality
Integrated Version 1 (v1) NOT SOLD	None	- requires provisioning/HMS configuration and enablement in the Agent Desktop	- no on site elements required	- Uses simple UI	- Not mobile compatible - Requires Java - Launch time is much slower
Integrated (v4/Premium)	CP 3 +	- requires provisioning/HMS configuration - add co-browse access in Agent Desktop - Configure UI and security in Co-browse Admin Console - add co-browse to CP pages - add co-browse JavaScript to non-CP pages if needed	- Deployed on site using Widgets - Co-browse JavaScript can also be added to non CP pages	- Requires default launch style (Launch Point 1) - UI and security are fully customizable	- All functionality available
Standalone (v4/Premium)	none	- requires provisioning - Configure UI and security in Co-browse Admin Console - add Co-browse Javascript to company site	- Co-browse JavaScript is added to company site	- Multiple launch style options - UI and security are fully customizable	- All functionality available

Existing Oracle Service Cloud customers using the integrated Co-browse solution on a release earlier than 14.11 should upgrade their Co-browse feature to V4 as soon as possible in order to access the benefits of the updated service. These benefits include faster launch time, mobile compatibility and no reliance on Java.

The Upgrade/Deployment Process

Important! Customers not yet on CP3 or greater will need to migrate from their earlier version to CP3.2 or greater, along with OSvC release 14.11 or later in order to implement the improved Co-browse solution.

It is recommended that the upgrade and implementation of v4 Co-browse first be performed on a test site before deploying on the customer's production site.

Note: In order for Provisioning to enable co-browse on the test site, the customer needs to request it specifically via CX.

Step 1: If upgrading from an earlier version of Co-browse, the customer will need to submit a Service Request to request an upgrade to their Co-browse deployment.

Step 2: The Provisioning team will access the [Co-browse Administration Console](#), currently hosted as a standalone administrative portal, to update the company, site id and premium launcher.js. for the customer. In Hosting Management System (HMS), the provisioning team will configure the site by configuring the following values (text in red is example text only – company-specific information will be configured):

MOD_COBROWSE_ENABLED = 0

MOD_COBROWSE_PREMIUM_ENABLED = 1

COMPANY_ID = 12345

COBROWSE_ACCOUNT = 1234@rightnow.com

COBROWSE_PASSWORD = 1234

COBROWSE_SITE_ID = RIGHTNOW:SC147644:US:1

COBROWSE_URL = https://www.livellook.com

COBROWSE_AGENT_PAGE = welcome/join.aspx

COBROWSE_PREMIUM_LAUNCHER_SCRIPT = https://51b6ffd145a878bcc0ef-1d91a574c55f9ae088ffba8ce1312d71.ssl.cf2.rackcdn.com/llscripts/launcher.js

COBROWSE_PREMIUM_CHAT_LAUNCHER_SCRIPT = webinterfaces/integrated/public/launcher.aspx

Step 3: In the very near future, an additional service will be added to step 2, wherein the Provisioning team will set up a company admin with access to the Oracle Co-browse Administrative Console. In the meantime, access to the Administrative Console is requested by emailing the Oracle Co-browse Product Manager with the following information:

- First name
- Last name
- Confirmation of the company name
- Email address

This information should be sent to michelle.brusyo@oracle.com.

By accessing the [Oracle Co-browse Administrative Console](#), the Configuration Administrator is able to make the UI customizations and security configurations required in order to deploy Co-browse. Those activities [are documented here](#).

Step 4: The Co-browse widget will need to be added to the customer’s Customer Portal pages to enable co-browsing of CP site content. The widget is referred to as the **CobrowsePremium widget**, and this refers to its functionality, which is v4/Premium. Following the steps below will add the Cobrowse Premium widget to all CP pages so that a co-browse session can be launched from the co-browse button that appears on every page. The button UI is configurable within the Co-browse Admin Console (step 3).

1. Open the standard.php file in the /views/templates folder.
2. Locate the following lines of code.

```
<div class="rn_Feedback">
<rn:widget path="feedback/SiteFeedback" />
<span>#rn:msg:SITE_USEFUL_MSG#</span>
</div>
</rn:condition>
</div>
```

3. Add the following lines of code immediately after the last line you located in step 2.

```
<div>
<rn:widget path="utils/CobrowsePremium" />
</div>
```

4. Save standard.php.

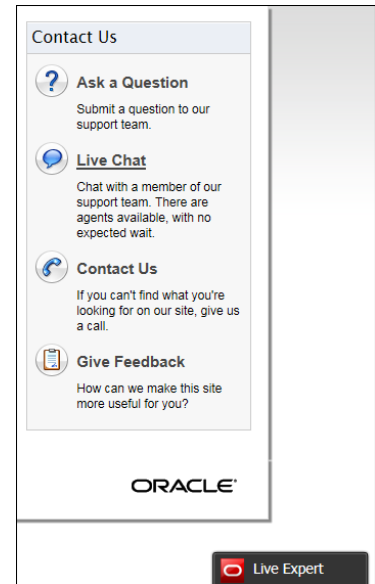
To enable mobile compatibility, follow the same steps above to modify the mobile.php template as well.

Making the updates above and promoting these CP pages to Production will enable co-browsing during phone interactions.

To enable co-browse that will be initiated via **chat** interactions, an additional **ChatCobrowsePremium** widget `<rn:widget path="chat/ChatCobrowsePremium"/>` is added to the **standard and mobile chat_landing.php** pages.

1. Open the chat_landing.php file in the /views/pages/chat folder.
2. Locate the following lines of code.

```
<div id="rn_InChatButtonContainer">
```



```
<rn:widget path="chat/ChatAttachFileButton"/>
```

```
<rn:widget path="chat/ChatSendButton"/>
```

3. Add the following lines of code immediately after the last line you located in step 2.

```
<rn:widget path="chat/ChatCobrowsePremium" />
```

4. Save chat_landing.php.

After the widgets have been added to the appropriate pages, the standard and mobile page sets will need to be enabled using the CP Administration pages.

Step 5: If the customer would like agents to have the ability view other website content outside of the Customer Portal, the Co-browse launcher script will need to be added to the global/master page header of the company's website (domain and subdomains):

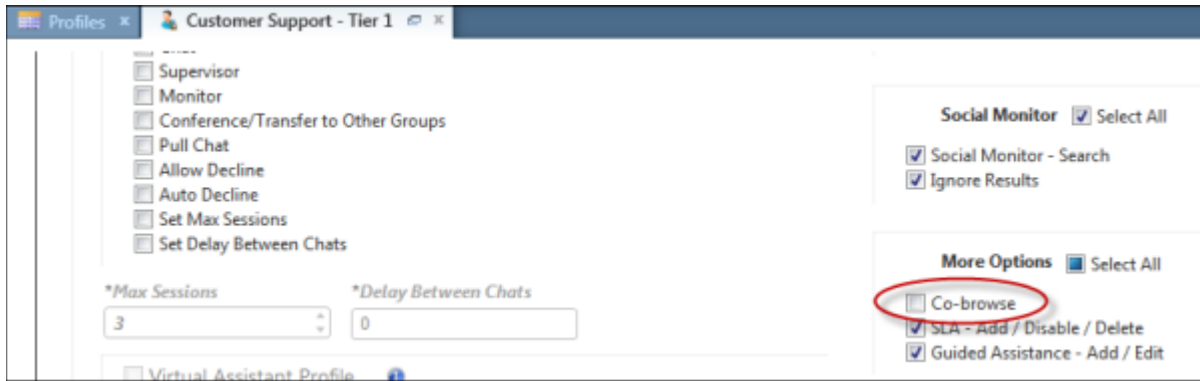
```
COBROWSE_PREMIUM_LAUNCHER_SCRIPT = https://51b6ffd145a878bcc0ef-1d91a574c55f9ae088ffba8ce1312d71.ssl.cf2.rackcdn.com/llscripts/launcher.js (given as an example – use accurate launcher script, obtained via the Co-browse Administrative Console)
```

The Co-browse launcher script is accessed via the Co-browse Administrative Console by clicking Products > Co-browse V4 > Configuration > Deployment Instructions.

Additional on-page changes may be required if the company is setting up field masking. Field masking instructions are outlined on page 26 of the [Configuration Administrator Guide](#).

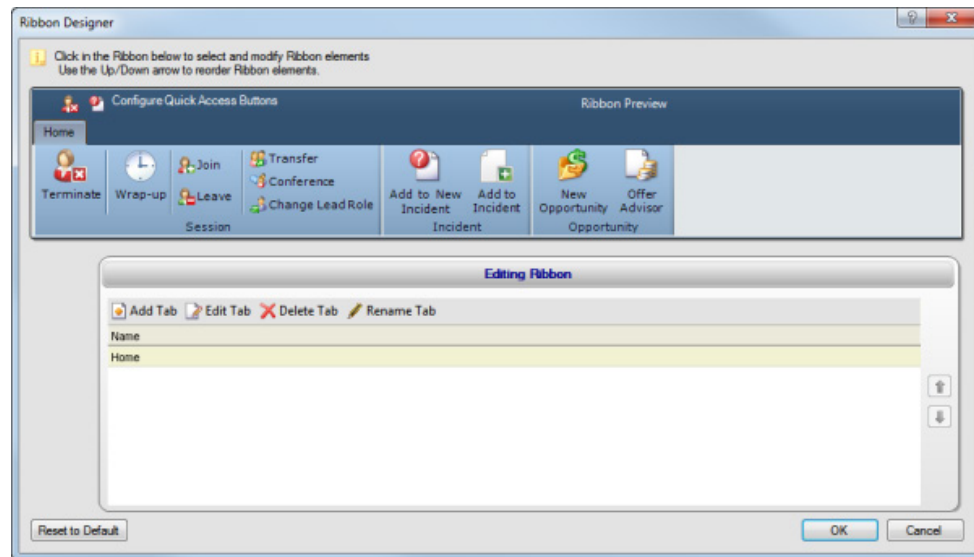
Step 6: Co-browse functionality will need to be enabled within the Agent Desktop.

1. Add co-browse permissions to a profile(s):
 - a. Click the Configuration button on the navigation pane.
 - b. Double-click Profiles under Staff Management. The report opens on the content pane.
 - c. Double-click the profile you want to edit. The Profile editor opens.
 - d. Click the Permissions button on the ribbon. The Permissions page opens.
 - e. Click the Service tab.

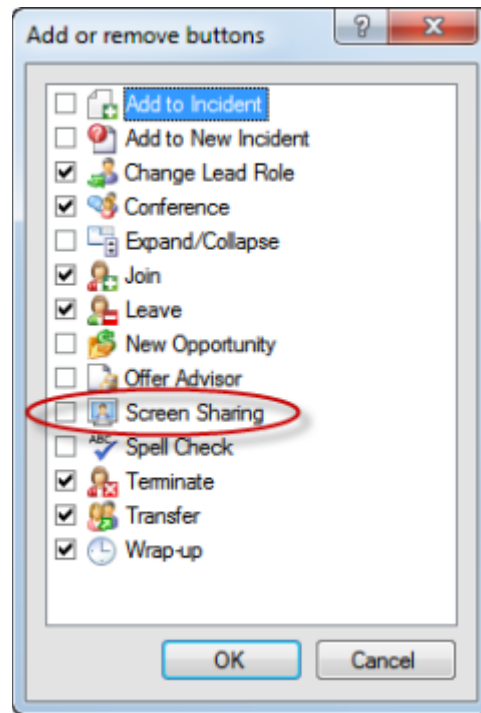


- f. Select the Co-browse check box.
 - g. Click the Save and Close button on the ribbon.
2. Configure Co-browse on Incident Workspaces (for phone interactions)
 - a. Click the Configuration button on the navigation pane.
 - b. Double-click Workspaces under Application Appearance. The Workspaces explorer displays on the content pane.
 - c. Expand the Standard folder, right-click the incident workspace, and select Copy. The Copy Incident As window opens.
 - d. Type a name for the copied workspace in the Name field and click the OK button.
 - e. Open the copy of the incident workspace.
 - f. Right-click next to the Audit Log tab and select Add Tab.
 - g. Click the Design tab on the ribbon.
 - h. In the Label section of the ribbon, click the Text drop-down menu and rename the tab Co-browse.
 - i. Click the Insert Control tab on the ribbon.
 - j. In the Relationship Items section of the ribbon, drag the Co-browse control under the Co-browse tab on the workspace.
 - k. Click the Save and Close button on the ribbon.
 - l.
 3. Configure Co-browse on Chat Workspaces
 - a. Click the Configuration button on the navigation pane.
 - b. Double-click Workspaces under Application Appearance. The Workspaces explorer displays on the content pane.
 - c. Expand the Standard folder, right-click the chat sessions workspace, and select Copy. The Copy Chat Sessions As window opens.
 - d. Type a name for the copied workspace in the Name field and click the OK button.
 - e. Open the copy of the chat sessions workspace.
 - f. Right-click next to the Incidents tab and select Add Tab.
 - g. Click the Design tab on the ribbon.
-

- h. In the Label section of the ribbon, click the Text drop-down menu and rename the tab Co-browse.
- i. Click the Insert Control tab on the ribbon.
- j. In the Relationship Items section of the ribbon, drag the Co-browse control under the Co-browse tab on the workspace.
- k. Click the Home tab on the ribbon and click the Ribbon button. The ribbon designer opens.



- l. Click a button in the Session group to activate the buttons.
- m. Click the Add Buttons button on the ribbon designer toolbar. The Add or Remove Buttons window opens.



- n. Select the Screen Sharing check box and click the OK button. The Screen Sharing button displays on the ribbon designer.
- o. Click the OK button. The ribbon designer closes.
- p. Click the Save and Close button on the ribbon.

Troubleshooting

If co-browse is not working properly, try the following steps:

- Double check that **ALL** cobrowse premium widgets were added to the appropriate CP pages exactly as outlined in Step 4.
- Upgrade to the newest version of chat widgets (e.g., ChatTranscript widget v1.3+)
- If co-browsing non-CP pages, ensure that the co-browse Javascript from step 5 was added to the pages you need to co-browse
- Ensure that you are using supported browsers