

Quick Guide: Implementing Visitor Browser History and Page Peek

The Oracle Service Cloud Chat solution provides agents the ability to view a customer's journey. Two of the features that make this view possible are Visitor Browser History and Page Peek. This document provides helpful insight into these features and answers the following questions:

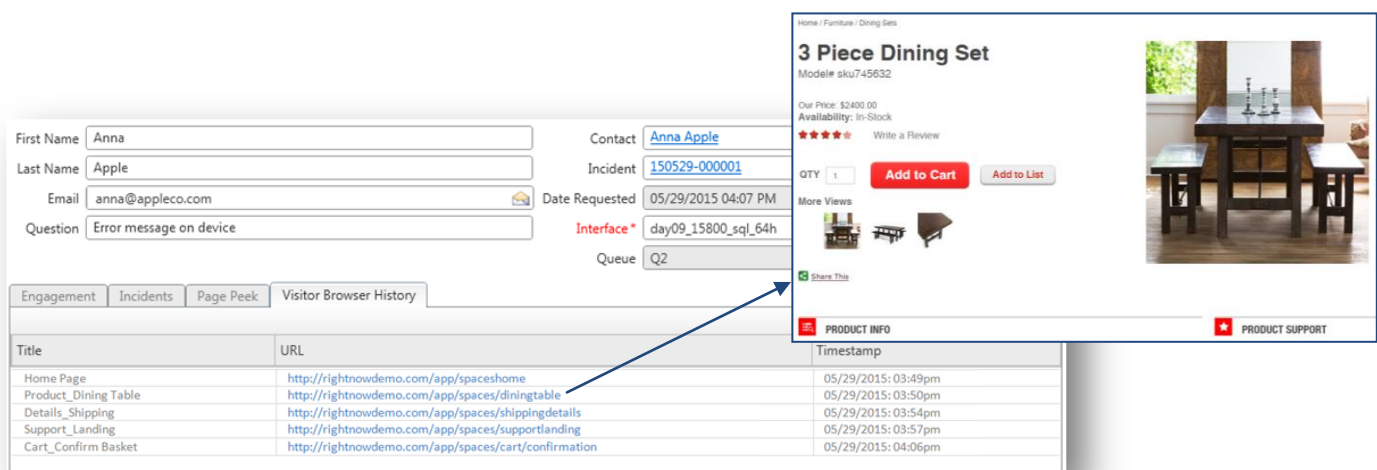
1. What is Visitor Browser History?
2. What is Page Peek?
3. Is the Engagement Engine required for these features to function?
4. Are there different requirements for deploying Visitor Browser History and Page Peek?
5. How can I implement these features?
6. What if I receive an error message?
7. Where can I go for more information?

Visitor Browser History: A Visual Pathway

Visitor Browser History allows a chat agent to see where the end-user has been on the company's website, prior to chatting with the agent, within a current browser session. The chat agent is provided a list of the historical URLs, and can click the URLs to see the visited pages.

The Visitor Browser History data provided to the chat agent includes:

- The relevant page title, URL and timestamp for pages visited by the end-user
- The most recent 15 pages visited by the end-user
- The end-user's browsing data for the last 30 minutes



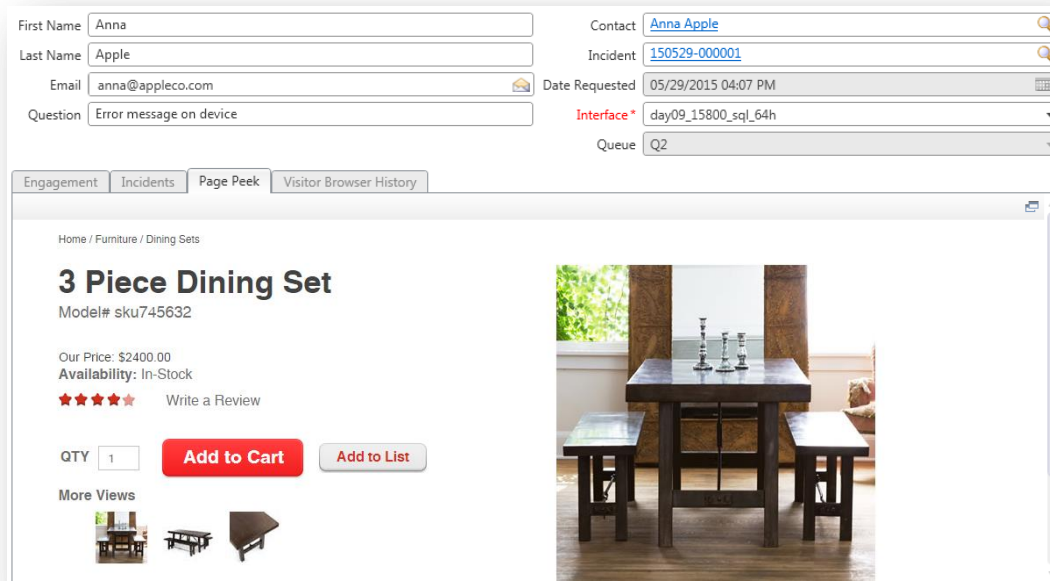
The screenshot displays the Oracle Service Cloud interface. On the left, a contact form shows details for 'Anna Apple' with email 'anna@appleco.com' and a question 'Error message on device'. Below this is a tabbed interface with 'Engagement', 'Incidents', 'Page Peek', and 'Visitor Browser History' selected. The 'Visitor Browser History' tab shows a table of visited pages:

Title	URL	Timestamp
Home Page	http://rightnowdemo.com/app/spaceshome	05/29/2015: 03:49pm
Product_Dining Table	http://rightnowdemo.com/app/spaces/diningtable	05/29/2015: 03:50pm
Details_Shipping	http://rightnowdemo.com/app/spaces/shippingdetails	05/29/2015: 03:54pm
Support_Landing	http://rightnowdemo.com/app/spaces/supportlanding	05/29/2015: 03:57pm
Cart_Confirm Basket	http://rightnowdemo.com/app/spaces/cart/confirmation	05/29/2015: 04:06pm

An arrow points from the 'Product_Dining Table' entry in the history table to a '3 Piece Dining Set' product page peek on the right. The peek shows the product name, model number 'sku745632', price '\$2400.00', availability 'In-Stock', a 5-star rating, and a 'Write a Review' link. It also includes 'Add to Cart' and 'Add to List' buttons, a 'More Views' section with three thumbnails, and a 'Show This' link. At the bottom of the peek are 'PRODUCT INFO' and 'PRODUCT SUPPORT' tabs.

Page Peek: A Helpful Snapshot

Page Peek allows the chat agent to see a snapshot of the webpage where the end-user engaged in the agent-assisted interaction. The chat agent is provided immediate visual insight into the customer’s journey.



The Engagement Engine Tag

The Engagement Engine is required in order for Visitor Browser History and Page Peek to function. This means the Engagement Engine must be enabled on your account and the Engagement Engine page tag must reside on your website. You want to ensure that the Engagement Engine tag is deployed on each page you want to track for either Visitor Browser History or Page Peek.

If the Engagement Engine tag does not reside on a page:

- Then Visitor Browser History will not track this page¹
- Then Page Peek will not display the snapshot

For more information on the Engagement Engine Tag please refer to the Quick Guide: Getting Started Guide for the Engagement Engine. This guide is available in the Oracle Service Cloud Support portal as Answer 7153.

¹ The chat agent will not see pages visited by the end-user that do not contain the Engagement Engine page tag. So if the end-user came to your website by way of a search engine, then the search engine results will not show to the chat agent. For example: The end-user performs a key word search in Google for “chat provider” and Oracle.com returns as a result. If the end-user clicks Oracle.com, navigates the website for a few minutes, then accepts a chat invitation, the Google search and results page will not be included in the Visitor Browser History information.

Requirements to deploy Visitor Browser History & Page Peek

Requirements	Features	
	Visitor Browser History	Page Peek
CX Site Version	Requires November 2014+	Requires November 2013+
Chat Enabled	YES	YES
CX Platform	Customer Portal version 3 (CP3)	Customer Portal version 3 (CP3)
Engagement Engine Enabled	YES	YES
Engagement Engine Tag Deployed	YES	YES
Network Appliance Whitelisting	static.atgsvcs.com, rules.atgsvcs.com, *.estara.com, *.estara.com AND os.atg.com	static.atgsvcs.com, rules.atgsvcs.com, *.estara.com, *.estara.com AND os.atg.com
Available on the following Chat Widgets:	SCCL, SPAC, CCL & PAC* (for CP3 Sites ONLY)	SCCL & SPAC* (for CP3 Sites ONLY)
CX Agent Console	.Net Console	Legacy Winforms .Net Console Agent Browser User Interface
Configuration Settings	VBH_ENABLED must be enabled	Automatically enabled for sites November 2013+
Workspace Control	Automatically included for sites November 2014+, but requires an updated Chat Workspace	Automatically included for sites November 2013+

*Widget Definitions: SCCL = Syndicated Conditional Chat Link
 SPAC = Syndicated Proactive Chat
 CCL = Conditional Chat Link
 PAC = Proactive Chat

Steps to Implement Visitor Browser History in the .Net Console

1. As a Chat Administrator, change the Configuration Setting for VBH_ENABLED from the default value to YES
 - a) There is an optional configuration setting: VBH_WHITELIST. Whitelisting can be implemented to ensure that only the requests coming from valid sites (as defined in the Whitelist) are accepted to be recorded. The Whitelist is defined as a comma separated URL and regular expressions are supported
2. Once the changes to Configuration Settings are saved, the Visitor Browser History tab is automatically included in the Standard Chat Sessions workspace
3. In order to make the Visitor Browser History tab visible to agents copy the Standard Chat Sessions workspace
4. Once the new Chat Workspace has been created, updated, and properly named, ensure the new Chat Workspace is specified in the appropriate chat Agent Profile(s)
5. Run a test chat on your test site to ensure the Visitor Browser History information is displayed within the open chat session (don't forget to login as a chat agent with the newly updated Profile from the previous step)

Steps to Implement Page Peek in the .Net Console

1. As a Chat Administrator, create a Page Peek Rule within the Engagement Engine
 - a) Place the Page Peek rule near the top of the Rule Evaluation Order
 - b) For more information on creating a Page Peek rule, please see Answer 7154 in the Oracle Service Cloud Support portal and reference the document Popular Business Rules in Engagement Engine Page
2. The Chat Administrator should be logged into the .Net Console
3. As long as the CX Site version is November 2013+, the standard Chat Workspace should already contain the Page Peek control
4. Run a test chat on your test site to ensure the Page Peek information is displayed within the open chat session
5. If the Page Peek information displayed within the open chat session does not match the page where you accepted the chat session – if it looks like a stripped down version of the web page – please refer to the Page Peek: Meta Element section of this document

Please note: If the end-user accepts multiple invitations on the same page, then Page Peek will show the same web page to the agent within the chat session. If the end-user is on Page A and accepts a chat invitation, then the agent will see Page Peek information from Page A. If the end-user is on Page A and accepts a second chat invitation, then the agent will not see another Page Peek page. If the end-user then goes to Page B and accepts a chat invitation, then the agent will see Page Peek information from Page B. If the end-user returns to Page A, then the agent will again see Page Peek information from Page A.

Steps to Implement Page Peek in the Agent Browser User Interface

1. As a Chat Administrator, create a Page Peek Rule within the Engagement Engine
 - a) Place the Page Peek rule near the top of the Rule Evaluation Order
 - b) For more information on creating a Page Peek rule, please see Answer 7154 in the Oracle Service Cloud Support portal and reference the document Popular Business Rules in Engagement Engine Page
2. The Chat Administrator should be logged into the .Net Console
3. From within the Workspace Designer, add a Tab Set control to the Interaction Workspace
 - a) Tip: Delete the Incident View control when editing a standard workspace and then add the Tab Set. Then add the Incident View control to the first tab and rename the tab
4. Add a Tab to the Tab Set and rename it to Page Peek
5. Add the Page Peek control under the new tab
6. Run a test chat through the Agent Browser User Interface to ensure the Page Peek information is displayed within the Interaction Workspace

Page Peek: Meta Element

If the Page Peek information displayed in a chat session does not match the look & feel of the page where the chat was accepted, then you can add the following meta element to your site:

```
<meta http-equiv="X-UA-Compatible" content="IE=Edge, 10, 9">
```

It is important to understand that browser versions may also impact the display of Page Peek information in the chat session, regardless of whether this meta element is in place. If the end-user and the agent are chatting on different browsers, the display of Page Peek information could be impacted. For example: If the end-user is using Firefox and the agent uses Internet Explorer, then the captured HTML may display differently for the agent than what the end-user sees on the webpage. The differences are dependent on the design of the website the end-user is visiting.

Notes on the placement of the meta element:

- This X-UA-Compatible header is not case sensitive
- This meta element must appear in the header of the webpage (the HEAD section)
- Additionally, it should be placed before all other elements, except for the title element and other meta elements

For more information about this meta element, please refer to this MSDN Library article:

<https://msdn.microsoft.com/en-us/library/jj676915%28v=vs.85%29.aspx>

Page Peek: Masking and Hiding Sensitive Information

Page Peek also offers the ability to mask or hide sensitive information. For example, if a chat invitation is accepted on a page where the end-user provides a credit card number then masking the credit card number may be required.

What is the difference between hiding and masking?

- The Hiding action is used to prevent a page form field element or a HTML element from being shown to the agent
- The Masking action is used to mask a field using a series of asterisks to prevent the agent from viewing the contents of the field
- Note: Hiding and Masking are ‘all or nothing’ actions. Partial masking or hiding is not available.

The addition of hiding and/or masking is done within the Page Peek rule, so there is a slight modification to Step 1 above. An Action to Hide Information or Mask Information must be included in the Page Peek rule (example rule here). These actions should precede the action to Enable Page Peek, so the order in which the actions are shown below is important to hiding and/or masking functioning properly:

Sensitive Information: Hide Information

Element Property *

- Select -

Operator *

- Select -

Element Property Value *

☐ Case Sensitive

☒ Trim Whitespace from Matched Value

Sensitive Information: Mask Information

On Demand: Enable PagePeek

Sensitive Information: Mask Information

Element Property *

- Select -

Operator *

- Select -

Element Property Value *

☐ Case Sensitive

☒ Trim Whitespace from Matched Value

Sensitive Information: Hide Information

On Demand: Enable PagePeek

For more information please review to the Engagement Engine Editor User Manual located in the Help section of the Engagement Engine. The section on Sensitive Information Actions contains additional details.

Visitor Browser History: Error Messages

If a chat agent is unable to see the visitor's browsing history within the CX console, the following error messages may appear:

- If the tab displays: "Please have your administrator enable the Engagement Engine and Visitor Browser History features"
 - Then the Engagement Engine is not enabled for this site and must be for Visitor Browser History to function
 - And the Visitor Browser History feature is not enabled and must be for Visitor Browser History to function
- If the tab displays: "Please have your administrator enable the Engagement Engine"
 - Then the Engagement Engine is not enabled for this site and must be for Visitor Browser History to function
 - The Visitor Browser History feature is enabled for this site
- If the tab displays: "Please have your administrator enable the Visitor Browser History feature"
 - Then the Engagement Engine is enabled for this site
 - The Visitor Browser History feature is not enabled and must be for Visitor Browser History to function

Additional Information

Additional information can be found online in the Support Portal (<https://cx.rightnow.com>) and the User Discussion Forum in the Chat and Cobrowse section.