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# Deployment Guide

Install Genesys Co-browse Server

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# Install Genesys Co-browse Server

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### Important

- Starting in 8.5.0, Embedded Cassandra mode is deprecated in Genesys Co-browse; support for this mode will be discontinued in 9.0.
- Genesys strongly recommends no more than one Cassandra instance on the same machine due to performance. If you intend to use a Cassandra instance embedded into Co-browse Server, you should not have a CASSANDRA\_HOME environment variable to avoid conflict between embedded and external CASSANDRA\_HOME variables.

## Creating the Co-browse Server Application Object in Genesys Administrator

### Important

Make sure to select the appropriate version tab below. The Application objects and templates are different for versions **8.5.000** and **8.5.001+**.

## 8.5.001+

### Overview

Co-browse 8.5.001+ introduces a new cluster configuration, which includes cluster and node Application objects. In the steps below, you create multiple Co-browse Server Application nodes, each with unique configuration, and unite them under a common configuration in the Cluster Application object:

- [Importing the Application Templates](#)
- [Creating the Co-browse Cluster Application](#)
- [Creating the Co-browse Node Application](#)

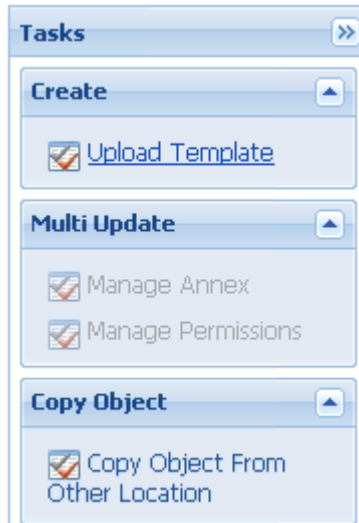
### Importing the Application Templates

To support this new configuration, you must first import two application templates, one for the node

and one for the cluster.

### 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.



Upload Template link in the Tasks panel

3. When the dialog box appears, Click **Add** to choose the application template (APD) file to import.
4. Choose the **Co-browse\_Cluster\_850.apd** file in the **templates** directory of your installation CD. The **New Application Template** panel opens.
5. Click **Save & Close**.
6. Complete the same import steps for the *Node Application Template* by importing the **Co-browse\_Node\_850.apd** file in the **templates** directory of your installation CD.

### End

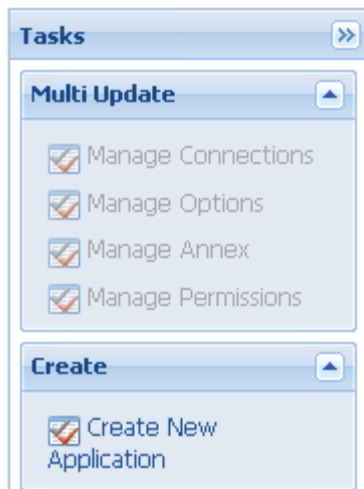
## Creating the Co-browse Cluster Application

### Prerequisites

- You completed [Importing the Application Templates](#).

### Start

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



Create New Application link.

3. In the **Select Application Template** panel, click **Browse for Template** and select the Co-browse Cluster template you previously imported. Click **OK**.
4. The template appears in the **Select Application Template** panel. Click **Next**.
5. In the **Select Metadata File** panel, click **Browse** and select the **Co-browse\_Cluster\_850.xml** file. Click **Open**.
6. The metadata file appears in the **Select Metadata File** panel. Click **Next**.
7. In **Specify Application parameters**:
  - Enter a name for your application—for example, Co-browse\_Cluster.
  - Enable the State.
  - Select the host of the Co-browse Server. Co-browse does not actually use this value for the Cluster Application, so you can specify any host.
  - Click **Create**.
8. The **Results** panel opens. Enable **Open the Application details form after clicking Finish** and click **Finish**. The Co-browse Cluster Application form opens to the **Configuration** tab.
9. If you use an external Cassandra cluster, add connections to the **external Cassandra Resource Access Points (RAPs)**. For each RAP connection, set the **ID** to default.
10. Create any necessary connections to other Genesys servers. For example:
  - Primary Configuration Server
  - Primary Message Server
  - Chat Server(s) or Chat Application Cluster

### Important

The connection to Chat Server needs to be done through the **webapi** port.

11. In the **Server Info** section, add the **Default Listening Port**. Co-browse does not use this value for the Cluster Application, so you can specify any port.
12. Make sure the **Working Directory** and **Command Line** fields are set to . (period).
13. In the **Options** tab, set the following configuration options:

### Important

Application Node configuration has priority over Application Cluster Configuration. If you configure an option in both the Application Node and Application Cluster objects with different values, Co-browse uses the Application Node value.

- In the **cassandraEmbedded** section: If you use an external Cassandra cluster, set **enabled** to false. Genesys recommends using an external Cassandra cluster. Support for embedded Cassandra will be discontinued in 9.0.
- In the **cassandraKeyspace** section: Set **replicationStrategyParams** using the following format:  
`'<Data Center name>':<Co-browse Nodes amount>`  
For example: `'OperationalDC':3`
- In the **cluster** section: Set the **url** option to the HTTP(S) Co-browse load balancer. For example:  
`https://<LB_host>:<LB_port>/cobrowse`

### Important

The **url** option is mandatory and you must configure this option to properly set up a Co-browse Server cluster. Be careful not to confuse the **url** option with the **serverUrl** option which is not mandatory.

14. Set additional options according to your needs. See [Configuration Options](#) for details.
15. Click **Save & Close**. The **Confirm** dialog displays the following message:

**The host and/or port(s) of the application will be changed. Do you want to continue?**

Click **Yes**.

## End

## Creating the Co-browse Node Application

### Prerequisites

- You completed [Importing the Application Templates](#).
- You completed [Creating the Co-browse Cluster Application](#).

Complete the following steps for *each* Co-browse Node Application in your cluster.

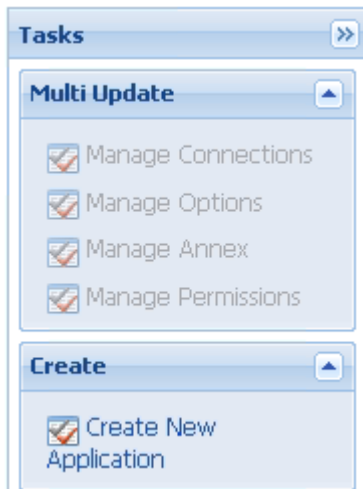
### Important

If your Cassandra cluster is built from Cassandra nodes that are embedded in your Co-browse nodes, the minimum number of Co-browse nodes is three. If you use an external Cassandra cluster, the minimum number of Co-browse nodes is two.

### Start

1. Open Genesys Administrator and navigate to **PROVISIONING > Environment > Hosts**.
2. Click **New...** and create the **Host** object where the Co-browse Node will run.
3. Navigate to **PROVISIONING > Environment > Applications**.

In the **Create** menu of the **Tasks** panel, click **Create New Application**.



Create New Application link.

4. In the **Select Application Template** panel, click **Browse for Template** and select the Co-browse *Node* template you previously imported. Click **OK**.
5. The template appears in the **Select Application Template** panel. Click **Next**.
6. In the **Select Metadata file** panel, click **Browse** and select the **Co-browse\_Node\_850.xml** file. Click **Open**.
7. The metadata file appears in the **Select Metadata File** panel. Click **Next**.
8. In **Specify Application Parameters**:
  - Enter a name for your application—for instance, Co-browse\_Node.
  - Enable the **State**.
  - Select the **Host** you created in Step 2. This is the host where the Co-browse Server will reside.
  - Click **Create**.
9. The Results panel opens  
Enable **Open the Application details form after clicking 'Finish'** and click **Finish**. The Co-browse

Node Application form opens to the **Configuration** tab.

10. Create a connection to the Co-browse Cluster Application you previously created and set the **ID** to default.
11. In the **Server Info** section, add the **Default Listening Port**. Set **Connection Protocol** to http and **Listening Mode** to unsecured.
12. If you intend to use https, add the **https port**. Set **Connection Protocol** to https and **Listening Mode** to secured.
13. Make sure the **Working Directory** and **Command Line** fields are set to . (period). Co-browse automatically populates these fields during installation.
14. In the **Options** tab, set the following configuration options:

### Important

Application Node configuration has priority over Application Cluster Configuration. If you configure an option in both the Application Node and Application Cluster objects with different values, Co-browse uses the Application Node value.

- In the **cassandraEmbedded** section: If you use an external Cassandra cluster, leave all values at their defaults. Otherwise, specify the necessary values for your configuration.
15. Set any other options according to your needs. See **Configuration Options** for details.
  16. Click **Save & Close**. The **Confirm** dialog displays the following message:  
**The host and/or port(s) of the application will be changed. Do you want to continue?**  
Click **Yes**.

**End**

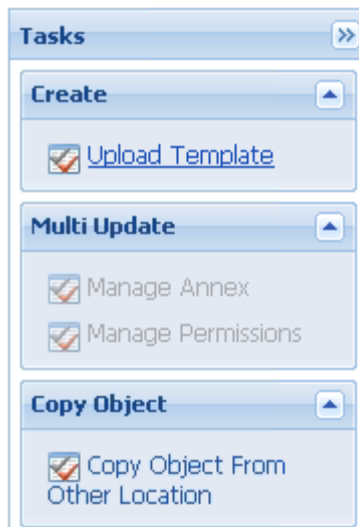
8.5.000

## Importing the Application Template for the Co-browse Server

### 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.





Upload Template link in the Tasks panel

3. Click Add in the Click 'Add' and choose application template (APD) file to import dialog box.
4. Browse to the Co-browse\_Server\_850.apd file, available in the templates directory of your installation CD. The New Application Template panel opens.
5. Click Save & Close.

### End

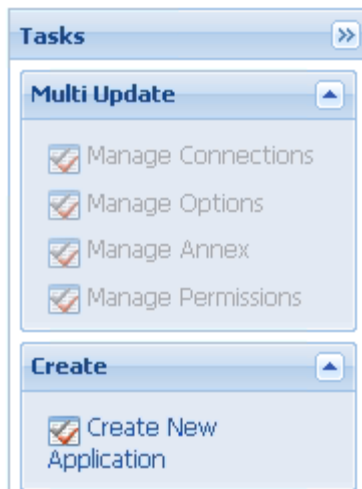
## Creating the Co-browse Server Application

### Prerequisites:

- You must have a webapi listening port configured on your Chat Server Application. For details, refer to the [eServices 8.1 Deployment Guide](#).
- You completed Importing the Application Template for the Co-browse Server.

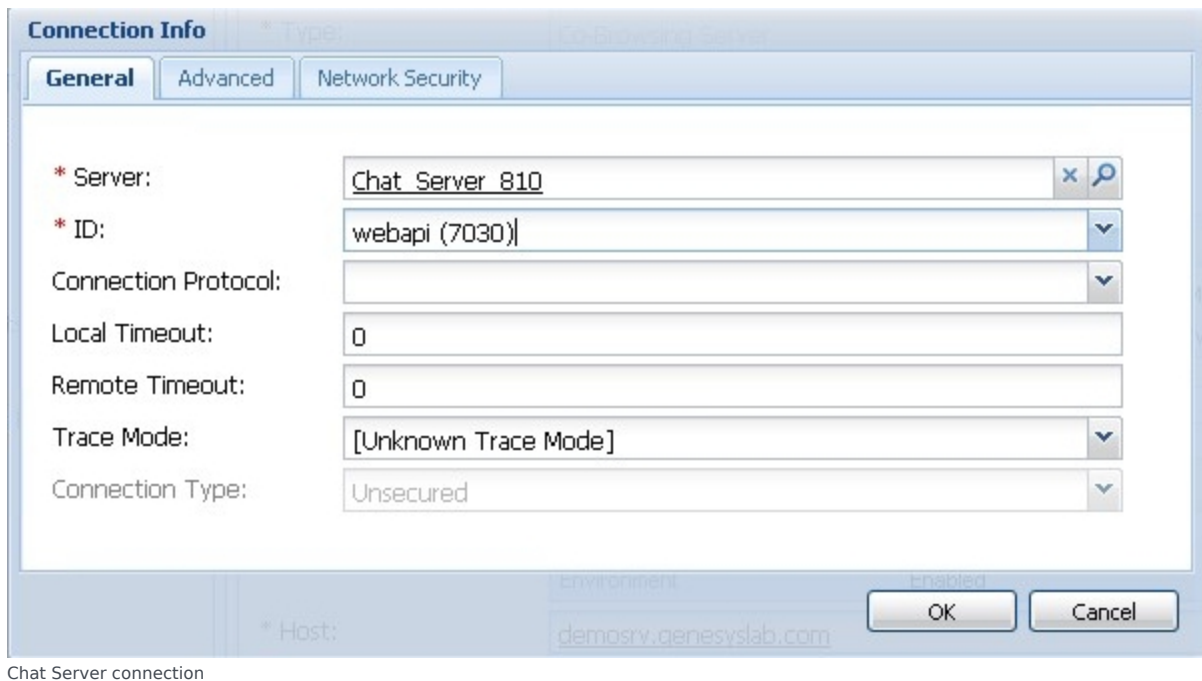
### Start

1. Open Genesys Administrator and navigate to PROVISIONING > Environment > Applications.
2. In the Create menu of the Tasks panel, click the Create New Application link.



Create New Application link.

3. In the Select Application Template panel, click Browse for Template and select the Co-browse Server template that you imported in [Importing the Application Template for the Co-browse Server](#). Click OK.
4. The template is added to the Select Application Template panel. Click Next.
5. In the Select Metadata file panel, click Browse and select the Co-browse\_Server\_850.xml file. Click Open.
6. The metadata file is added to the Select Metadata file panel. Click Next.
7. In Specify Application parameters:
  - Enter a Name for your application—for instance, Co-browse\_Server.
  - Enable the State.
  - Select the Host on which Co-browse Server will reside.
  - Click Create.
8. The Results panel opens.
  - Enable Opens the Application details form after clicking 'Finish' and click Finish. The Co-browse Server application form opens to the Configuration tab.
9. Add a connection to Chat Server.
  - Click Add in the Connections section.
  - Select the Chat Server and click OK.
  - Edit the connection and set ID to the webapi listening port on your Chat Server.



- Click OK.

10. If your Host is not defined, click the lookup icon to browse to the hostname of your application.

11. Add the default port.

- Click Add in the Listening Ports section. The Port Info dialog box opens.
- Enter the application's Port. For instance, 8700. This must be a Jetty port configured in the Jetty configuration file.
- Mandatory: Enter http for the Connection Protocol field. This connection protocol setting will be used by IWS to connect to the Co-browse Server.
- Optional: Enter a description.

The screenshot shows the 'Port Info' dialog box with the 'General' tab selected. The fields are as follows:

Field	Value
* ID:	default
* Port:	8700
Connection Protocol:	http
HA sync:	<input checked="" type="checkbox"/> True
Select Listening Mode:	Unsecured
Description:	
* Host:	demosrv.genesyslab.com

Buttons: OK, Cancel

The default http listening port.

- Click OK. The HTTP port with the default identifier appears in the list of Listening Ports.

### 12. Add the secure port.

- Click Add in the Listening Ports section. The Port Info dialog box opens.
- Enter https for the ID.
- Enter the application's secure Port. For instance, 8743. This must be a Jetty port configured in the Jetty configuration file.
- Mandatory: Enter https for the Connection Protocol field.
- Mandatory: Select the Secured for the Select Listening Mode field.
- Optional: Enter a description.



The screenshot shows a 'Port Info' dialog box with three tabs: 'General', 'Advanced', and 'Network Security'. The 'General' tab is selected. It contains the following fields:

- \* ID:
- \* Port:
- Connection Protocol:  (dropdown arrow)
- HA sync: ☐ True
- Select Listening Mode:  (dropdown arrow)
- Description:

At the bottom right are 'OK' and 'Cancel' buttons. A small 'cc.com' watermark is visible in the bottom left corner of the dialog.

The https listening port.

- Click OK. The HTTPS port with the https identifier appears in the list of Listening Ports.
13. Ensure the Working Directory and Command Line fields contain "." (period). They will be automatically populated when the Co-browse Server is installed.
  14. Click Save & Close. The Confirm dialog displays the following message: The host and/or port(s) of the application will be changed. Do you want to continue? Click Yes.

**End**

### Next Steps

- You can now install the Co-browse Server as described in [Installing the Co-browse Server](#).

## Installing the Co-browse Server

With basic Configuration Server details in place, you can now complete the installation process.

### Important

Genesys does not recommend installation of its components using a Microsoft Remote Desktop connection. You should perform the installation locally.

**Prerequisites:** You completed [Creating the Co-browse Server Application Object in Genesys Administrator](#).

### Start

1. In your installation package, locate and run the setup application for your platform as specified below:

- Linux: **install.sh**
- Windows: **setup.exe**

The Install Shield opens to a welcome screen.

2. Click **Next**. The **Connection Parameters to the Configuration Server** screen appears.
3. Under **Host**, specify the host name and port number of your Configuration Server. This value should be the same as the main listening port in the **Server Info** tab of your Configuration Server.
4. Under **User**, enter the user name and password to log in to Configuration Server.
5. Click **Next**. The **Select Application** screen appears.
6. Select the Co-browse Server Application you are installing. The **Application Properties** area shows the **Type**, **Host**, **Working Directory**, **Command Line executable**, and **Command Line Arguments** information previously entered in the **Server Info** and **Start Info** tabs of the selected Application object.
7. Click **Next**. The **Choose Destination Location** screen appears.
8. Under **Destination Folder**, keep the default value or click browse to set the installation location.
9. Click **Next**. The **Backup Configuration Server Parameters** screen appears.
10. Under **Host**, specify the host name and the port number where the Backup Configuration Server is running.
11. Click **Next**. The **Ready to Install** screen appears.
12. Click **Install**. When The Genesys Installation Wizard finishes installing Co-browse Server, the **Installation Complete** screen appears.
13. Click **Finish** to complete your installation of Co-browse Server.

### End

### Next Steps

- Complete the configuration of the Co-browse Server Application, as described in [Configuring the Co-browse Server](#).

## Configuring the Co-browse Server

Complete the steps below to configure the Co-browse Server application in Genesys Administrator. This procedure only covers a few of the mandatory options. Most options can be left at their default values.

**Prerequisites:** [Creating the Co-browse Server Application](#).

### Start

1. Open Genesys Administrator and navigate to **PROVISIONING > Environment > Applications**.
2. If you are installing version **8.5.000**, select the Co-browse Server Application that you previously created. If you are installing **8.5.001+**, select the Co-browse *Cluster* Application you previously created.
3. In the **Options** tab, locate the **session** section and update the following options:
  - **domRestrictionsURL**—a URL that points to the XML file that contains DOM restrictions. By default, all **Submit** buttons are disabled for the agent. For information about customizing this XML file, see [DOM Restrictions](#)
4. If you deploy Co-browse Server to an environment where the Internet is accessed using a forward proxy (for example, DMZ or local intranet), configure the options in the **forward-proxy** section.
5. If your configuration uses Genesys Chat, update the following option in the **chat** section:
  - **queueKey**—specifies the endpoint configured in Chat Server. Use the format `tenantid:endpointname`.
6. If you are installing **8.5.001+**, **Save & Close** your Co-browse Cluster Application and open the Co-browse Node Application that you previously created.
7. Configure the options in the **log** section. These options are standard Genesys log options. For details, refer to the [Management Framework 8.1 Configuration Options Reference Manual](#).
8. If you use Genesys Workspace Web Edition, configure the **serverUrl** option in the **cluster** section.
9. Click **Save & Close**.

### End

### Next Steps

- [Install the Genesys Co-browse Plug-in for Workspace Desktop Edition](#)
- [Configure Genesys Workspace Web Edition to Work with Co-browse](#)