Help

Genesys Co-browse 9.0.0

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Co-browse Plug-in for Workspace Desktop Edition Help

Workspace Desktop Edition (Workspace) is a modular, customizable application that enables you to handle contact-center interactions, monitor contact-center and personal key performance indicators, and consult with your colleagues.

A set of plug-ins enables you to work with various interactions. This Help contains information about how to handle Genesys Co-browse sessions during Chat and Voice interactions.

Getting Started

Getting started with Genesys Co-browse includes launching the application and logging in.

- Launching the Workspace Desktop Edition application.
- Login—The first view that you see. It enables you to identify yourself and, if required, enter additional login data based on your role or the technical environment.

Launching Workspace Desktop Edition

There are two ways to launch the application:

From the **Start** menu, select **All Programs** > **Genesys Solutions** > **Workspace Desktop Edition** > **Workspace Desktop Edition**.

Or:

Double-click the **Workspace Desktop Edition** icon on your desktop:

The Workspace Desktop Edition Login dialog box is displayed.

After you authenticate, Workspace Desktop Edition might automatically update your session if new tasks are assigned to you or if the application is updated.

Login

After launching Workspace Desktop Edition, the **Login** dialog box is what you first see.

To identify yourself:

1. Enter your user name in the **User Name** field.
2. Enter your password in the **Password** field.
3. Click **Log In** to authenticate yourself on the system.

Important

See the Workspace Desktop Edition Help for information about the **More/Less** options in the **Login** dialog box.

The **Workspace Desktop Edition Main Window** (or the Gadget view) opens immediately after you click **Log In**.

Working With Genesys Co-browse

Genesys Co-browse provides the ability for an agent and the end customer to browse and navigate the same web page at the same time. In a Genesys Co-browse Session, both the agent and the customer share the same instance of the screen, as opposed to a conventional screen sharing application, where one of the parties sees an image of the other party's browser instance.

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.

Genesys Co-browse Interaction Window

Workspace Desktop Edition enables you to co-browse with a customer working in chat or a phone conversation. You can:

- Ask a customer to initiate a Co-browse Session, and then accept the request to join a Co-browse Session
- Co-navigate in the browser window
- End a session

Starting a Co-browse Session

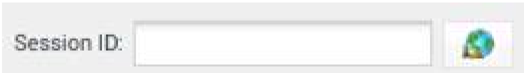
A Co-browse Session must be initiated by the customer. Websites that are instrumented for Genesys Co-browse will include a "Co-browsing" (or similar) button that the customer must click to start the session.

When the customer clicks this button, an alpha-numeric session identifier will be generated and presented to them. If you are engaged in chat with the customer, the Co-browse Session might start automatically, depending on how the Chat widget is integrated with Genesys Co-browse.

If the session does not start automatically, the customer must copy and paste the session ID into an existing chat session. Similarly, if the customer initiated a Co-browse Session during a phone conversation, then they must read the ID to you over the phone.

If this is the case, complete the following steps to start the Co-browse Session:

1. Expand the **Co-Browse** panel in Workspace Desktop Edition.
2. Enter the session ID into the **Session ID** field, and click the **Start Co-Browse** button.



The customer's browser will be displayed in your 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 you. The customer is notified on his or her screen that the session has been established.

> **Important**
> Genesys Co-browse does not support conference or transfer for chat and voice.

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 Session** button (the name and location of this button can vary).

If the customer exits the session, you will be notified that the session has ended, and your browser will no longer display a view of the customer's browser. Likewise, if you exit the session, the customer will be notified.

To exit the session, click the **Exit Session** button.

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 in chat, after a preconfigured timeout for chat interactions expires. If any participant opens a page outside the Co-browsing area, the session remains alive so that the participant can return. If the participant does not return within a predefined time interval, the session is terminated.

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

Participating in a Co-browse Session

When a Co-browse Session is active, both you and the customer have the right to perform conventional user actions at the same time. You can see each other's mouse movements at all times, and mouse clicks are emphasized with a red circle effect around the mouse pointer. This enables you to point to specific sections on the web page to help direct the customer through his or her task.

If you request and the customer approves Write mode during the session, this means that both of you can enter text, click buttons, and so on. In Write mode, you can also navigate by clicking links and so on in the web page, or by using the navigation options in Workspace Desktop Edition:

- Click the **Back** and **Forward** arrows
- Type a URL directly into the URL bar and press **Enter**
- Click the **Refresh** button to reload the page

Administrators can limit which fields are visible to you. Some fields might be grayed out entirely, and some might have the data masked. For example, administrators might choose to hide the customer's sensitive data: Social Security Information, and so on from all agents. The customer can easily identify which information is hidden from you – a special tooltip will appear on the customer’s side. Passwords are masked by default in the system and this cannot be changed.

At the same time, control for some elements can be disabled. By default Co-browse configuration, all **Submit** buttons are deactivated for agents (though this could be changed by overwriting Dom Restrictions configuration). If you click a **Submit** button, nothing happens. The customer always has permission to submit any web forms, just as they would while browsing normally.