



Glance Cobrowse Setup Guide

Version

This document applies to Glance Cobrowse version 3.3.0. For other versions of the setup guide, please see the Setup tab in the [Glance Cobrowse Developer Guide](#).

Overview

The **Glance Cobrowse Setup Guide** has been created to explain how to configure **Glance Cobrowse**, including its specific product features, settings, and controls into a company website.

A typical website setup includes adding the **Glance Cobrowse JavaScript tag** to all pages that will be used during a cobrowse session and adding a [button or link](#) which, when clicked, will start a cobrowse session. This document will explain how to carry out these steps.

Once you set up **Glance Cobrowse**, you will be ready to have your agents guide customers through any web transaction, inside a shared browser window with ease. For a description of how **Glance Cobrowse** works, please navigate to [What is Glance Cobrowse?](#)

Definitions

Customer	A customer (company) that subscribes to the Glance Cobrowse service.
Website	The company website that is offering support via cobrowse.
Visitor	Anyone navigating the company website.
Customer Service Agent	A representative, supporting a visitor who is browsing the company's website.
Group ID	A unique ID assigned to a company by Glance .



Session Code	A unique session identifier available to both the visitor and agent, allowing the agent to connect to the correct visitor session.
Visitor ID	Any identifying piece of information that is known about a visitor at the time a web page is generated.
Masked Field	An input field on a company website form containing sensitive data, whose content is not visible to agents or the Glance service.
Masked Element	Non-input elements on the company website containing sensitive data, whose content is not visible to agents.

Customer Group ID

Glance assigns every customer a unique customer **Group ID**, which you will need when you integrate cobrowse into your website. To access the unique customer **Group ID**, you will need a Glance username and password. If you don't have one, please contact Glance. See login steps below.

Cobrowse settings access

To access your cobrowse settings follow these steps:

1. Go to www.glance.net and click **My Account**.
2. Log into your account using your [Glance Address and Password](#).
3. Click the **Settings** tab in the **Manage Your Account** window.
4. In the bottom left corner of the **Settings** tab, click **Manage your cobrowse settings**.

Manage Your Account Logout

SUMMARY PROFILE ACTIVITY AUDIO SUBSCRIPTIONS BILLING USERS **SETTINGS**

User Privileges and Settings

Settings apply to all users in your group

Settings	Enabled
Can host sessions without a session key	<input checked="" type="checkbox"/>
Can specify what guest information is required, optional, or not shown	<input checked="" type="checkbox"/>
Can allow guests to show their screens	<input checked="" type="checkbox"/>
Can start sessions to view guests' screens	<input checked="" type="checkbox"/>
Can allow remote control	<input checked="" type="checkbox"/>
Can control guest's screen when viewing	<input checked="" type="checkbox"/>
Encrypt sessions	<input checked="" type="checkbox"/>
Screen-sharing permitted (Unchecked to always prohibit screen-sharing)	<input checked="" type="checkbox"/>
Cobrowsing permitted (Unchecked to always prohibit cobrowsing)	<input checked="" type="checkbox"/>

Cancel Save Changes

Cobrowse Settings Manage API Key Change

Manage your cobrowse settings

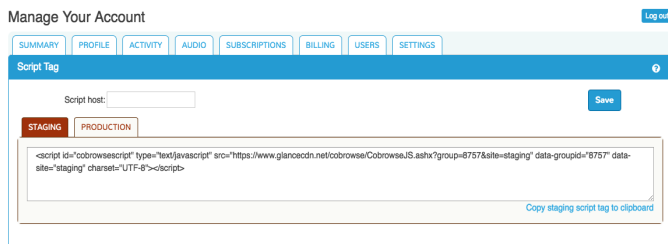
Your group's API Key: Change it

Staging and production sites

Typically, a **Glance Cobrowse** customer will have a staging site where new website changes can be tested before being published on the production site. The staging site may require a different cobrowse configuration from the



production site. For example, [masked](#) field definitions or [button styling](#). **Glance Cobrowse**, therefore, supports two different sites for a given group: staging and production.



Site hosted on localhost

Glance Cobrowse will not work on a website accessed at localhost. If you are trying out **Glance Cobrowse** on a local website, please access it via a host name added to your [local hosts file](#) or equivalent.



Note You cannot start a session from a page that is opened locally with the [file://protocol](#).

Integration with the `<script>` tag

Glance Cobrowse requires a `<script>` tag to be added to all website pages that are viewable to the agent during a cobrowse session. All or only part of a website may be instrumented with the cobrowse `<script>` tag. Since most websites are architected with a template used to generate most, if not all, web pages the template is the appropriate location to add the cobrowse `<script>` tag.

The `<script>` tag must be included on the page itself, as well as in any iframes whose host or protocol does not match the page host or protocol.



Note The `<script>` tag is required to be embedded via https to ensure the integrity of the JavaScript file.

For your convenience, **Glance Cobrowse** generates a customized `<script>` tag for your account which you can copy and paste into your company website. Navigate to the [cobrowse settings](#) page and the `<script>` tag section will be displayed at the top of the page.



There are two versions of the `<script>` tag: one for the [staging](#) website, and one for the [production](#) website. **Glance Cobrowse** recommends that you start with the `<script>` tag provided in your account settings, then customize as needed using the parameters documented below.

Script Tag

Script host:

*

staging

production

```
<script id="cobrowsejs" type="text/javascript" src="https://www.glancecdn.net/cobrowse/CobrowseJS.ashx?group=8757&site=staging" data-groupid="8757" data-site="staging" charset="UTF-8"></script>
```

Copy staging script tag to clipboard

The example format of the **Glance Cobrowse**`<script>`tag:


```
<script id="cobrowsescript" type="text/javascript"
src="https://[cdnname].glancecdn.net/cobrowse/CobrowseJS.ashx?group=[groupid]&
site=[production|staging]"
data-groupid="[groupid]"
data-site="[production|staging]"
data-inputevents='{...}'
data-termsurl="[terms and conditions url]"
data-cookiedomain="[session cookie domain]"
data-cookietype="[normal|ls|dual|secure]"
charset="UTF-8">
</script>
```

Attributes in the `<script>` tag:

cdnname	Customized CDNsubdomain for your company, or if you have not yet been assigned a customized name, use www.
group	Your assigned Group ID number provided by Glance .
site	Two site options:1.) staging (testing) and 2.) production (live). This allows Glance to push newer versions script tag to your staging site for testing before deploying to production.
Required attributes:	
data-groupid	Same as group in the <code>src</code> attribute.

data-site	Same as site in the <code>src</code> attribute.
Optional attributes:	
data-ui	See default vs. custom UI section of the document.
data-termsurl	A URL pointed to your terms and conditions page for the Glance Cobrowse service. This is only required if you are using Glance Cobrowse's built-in terms and conditions window. Alternatively, this URL can be specified in the button customization tool. (See button styling .)
data-inputevents	<p>Maps input events to Glance Cobrowse's actions. The data-inputevents format is:</p> <pre>{ "[modifier]-[keycode]" : "[Glance action]", ... }</pre> <p>For example:</p> <pre>data-inputevents='{ "ctrl-13" : "startSession", "ctrl-9" : "toggleButton" }'</pre> <p>This above example indicates that pressing Ctrl+Enter starts a session and Ctrl+Tab toggles the visibility of the cobrowse button. Allowed modifier keys are Shift, Ctrl, and Alt. The key code may be any standard JavaScript key code. See Starting a Session from a Link or Button for a list of supported Glance Cobrowse actions.</p>



	<div>  <p>Note Please use single and double quotes exactly as shown as in the above example. The outer quotes around the attribute value should be single quotes, and the quotes within the attribute value must be double quotes.</p> <p>For your customers on mobile devices, the hot key sequence will not work. For these customers we recommend adding a link or a button to allow them to start a session.</p> </div>
data-cookiedomain	<p>The domain to use for the Glance Cobrowse session cookie. This setting is typically required only for staging sites hosted on a public suffix domain such as <i>azurewebsites.net</i> or <i>herokuapp.com</i>. Specify the full host name as the cookie domain. For example, if your staging site is <i>atabcco.azurewebsites.com</i>, specify</p> <p>data-cookiedomain="atabcco.azurewebsites.com"</p>
data-cookietype	<p>The type of cookie to use for the Glance Cobrowse session. Possible values include the following:</p>



	normal (default)	A non-secure cookie on your website domain. Use this value if visitors need to be able to navigate to insecure pages during a cobrowse session.
	secure	A secure cookie on your website domain. You may use this value if visitors will only need to be able to navigate to secure pages during a cobrowse session.
	ls	Local storage on your website domain. You may use this value if you would like to avoid adding a cookie to your domain, and if your visitors only navigate to pages on the same
	dual	Both local storage and cookie are used. Use this value if you have existing code which may delete cookies on your website domain, including the Glance Cobrowse session cookie.
data-custver	Custom CSS cache buster version parameter. The cobrowse button custom CSS file has a one week cache time. If a change is made to the custom CSS specify any value in data-custver as a cache buster to force an immediate	



download of the updated CSS to all visitors.
--

For example, if your [Group ID](#) number is 0001, and you are deploying on your staging site with company **cdnname** "Abcco", your `<script>` tag would look like this:

```
<script id="cobrowsescript" type="text/javascript"
src="https://abcco.glancecdn.net/cobrowse/CobrowseJS.ashx?group=0001&site=staging"
data-groupid="0001"
data-site="staging"
charset="UTF-8">
</script>
```

Once a session is in progress, any tagged pages that the visitor navigates to will be included in the session. Pages without the `<script>` tag will not be included in a session and will appear to be "paused" or screen darkens on the agent side just as if the visitor had navigated to another website or closed the browser tab.

Using a `<meta>` tag for attributes

In some environments, it is not possible to add arbitrary attributes to a `<script>` tag. Cobrowse parameters can alternatively be specified in a `<meta>` tag.

For example:

```
<meta
id='cobrowsescript'
data-groupid='12345'
data-site='staging'
data-inputevents='{ "ctrl-13": "startSession", "alt-190": "toggleButton", "shift-13": "showButton" } '
></meta>
```

The id of the `<meta>` tag must be "cobrowsescript".

If you are hosting the script on your own server, add an attribute `data-scriptserver` which tells **Glance** where to find the additional script and CSS resources that you host.

For example:

```
data-scriptserver='https://myscriptserver.net/scripts'
```



Tag management

The **Glance Cobrowse** `<script>` works with tag management systems such as Tealium and Ensighten and can be added to the page after the page load, if desired. If adding the `<script>` tag dynamically, the following is the best cross-browser approach:

1. Create the `<script>` element and set all attributes except the `src` attribute.
2. Add the `<script>` tag to the document.
3. Set the `<script>` tag `src` attribute.

Self-hosted script

Most customers prefer to reference the Glance Cobrowse script from the glance CDN at glancecdn.net. When you use the Glance CDN:

- Glance can easily provide you updates and enhancements to the Cobrowse product
- Changes made using the button customization tool will be automatically applied without involving your website development team.

You can, however, host the scripts on your own server if you prefer. Glance will provide upgraded scripts approximately once per quarter, and will support the current version and at least one version prior.

To host the `<script>` on your company website instead of accessing it from our CDN, you will need to:

1. Download the [Glance Cobrowse 3.3.0 JavaScript package](#) and unzip the package onto your web server.
2. If you have customized your cobrowse button using the button customization tool, download your custom skin css files into a **customstyles** directory of the unzipped package. Your custom skin files can be found at the following urls (specify your unique group id in place of [groupid]): **[www.glancecdn.net/cobrowse/customstyles/CustomSkin_\[groupid\]_S.css](http://www.glancecdn.net/cobrowse/customstyles/CustomSkin_[groupid]_S.css)**, **[www.glancecdn.net/cobrowse/customstyles/CustomSkin_\[groupid\]_P.css](http://www.glancecdn.net/cobrowse/customstyles/CustomSkin_[groupid]_P.css)**.

When the **Glance** cobrowse script is self-hosted, the `<script>` tag `src` attribute should reference the GlanceCobrowseLoader script as it is hosted on your company website:

```
<script id="cobrowsescript" type="text/javascript"
src="https://www.yourcompany.com/glance/GlanceCobrowseLoader_3.3.0M.js"
data-groupid="0001"
data-site="staging"
charset="UTF-8">
</script>
```

None of the other scripts, images, or style sheets in the package should be referenced in your website.



Upgrading self-hosted script

Periodically, Glance will release updates to the cobrowse JavaScript package. To upgrade your website to use the latest scripts, you will need to download a new package and put it on your website. The GlanceCobrowseLoader script in the new package will be named with the new version number. You have a couple of options for dealing with upgrades:

1. Once a new release is available, update your website to point to the new version. In other words, in the script tag above, change the version number to match the version number you are upgrading to.
2. Use a configuration setting on your website to control the version number, for example:

```
src="https://www.yourcompany.com/glance/GlanceCobrowseLoader_<%=GlanceCobrowseVersion%>M.js"
```

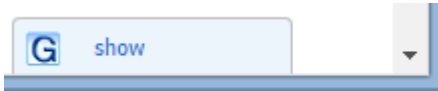
3. Copy the GlanceCobrowseLoader_x.y.zM.js script to a generic name "GlanceCobrowseLoader.js" and reference that name in the script src attribute. You will need to make sure that your server applies appropriate cache headers so that visitors will be sure to get the latest version after you upgrade.

Starting a Session from a Link or Button

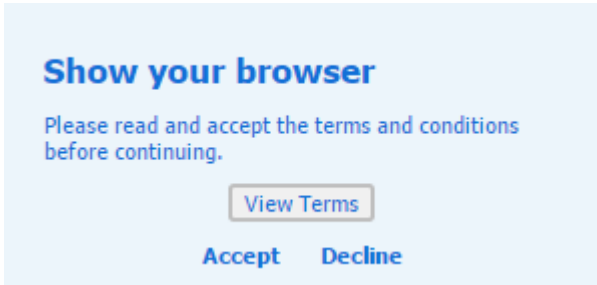
Even after you instrument your website with the cobrowse<script>tag, there will be no visible UI for starting a cobrowse session. Most customers do not want the **Glance Cobrowse** UI to be visible when the visitor is not in session, so by default, it is not initially displayed. Instead, customers provide their own clickable element, such as a link, button, or menu option which can be used to start a session. This is especially important for supporting customers on mobile devices who cannot start a session with a hot key sequence.

To do this, add a `glance_button=" [Glance action] "` attribute to any element on the web page depending on the desired session start behavior.

Valid **Glance Cobrowse** actions:

showButton	<p>Shows the Glance Cobrowse UI which the visitor can use to start a session.</p> 
toggleButton	<p>Toggles the display of the Glance Cobrowse Start button.</p>
showTerms	<p>Show the terms and conditions window with Accept/Decline buttons. The View Terms button on this window links to the URL specified in the data-termsurl attribute on the cobrowse<script>tag or in the cobrowse button customization.</p>



	
startSession	Starts a session (displaying the Glance Cobrowse UI).
stopSession	Stops the session if one is currently running.

Examples:

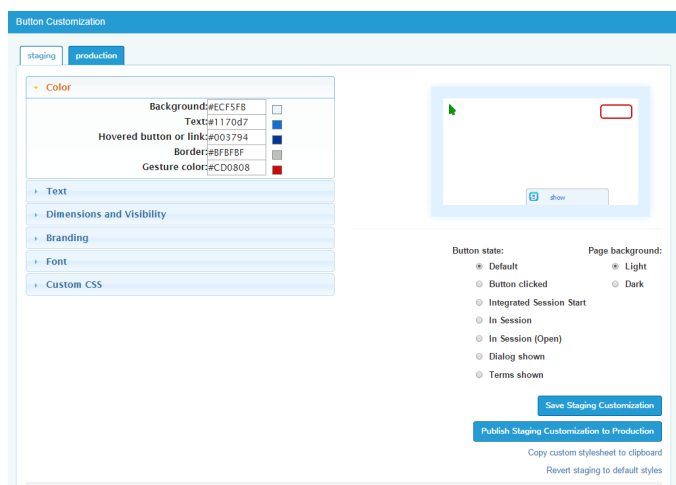
```
<a href="javascript:;" glance_button="startSession">Start Cobrowse</a>
<a href="#" onclick="javascript:return false;" glance_button="startSession">Start Cobrowse</a>
```

When **Glance Cobrowse** is integrated with chat, it may not be necessary for the visitor to take any action to initiate a session.

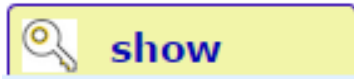
Styling the Glance Cobrowse button

The **Glance Cobrowse** button can be styled in various ways to meet customer needs. Colors, location, logos, and wording can all be set by overriding the default button styles.

The **Button Customization** section is located on the [cobrowse settings](#) page:



Example of a custom cobrowse button:

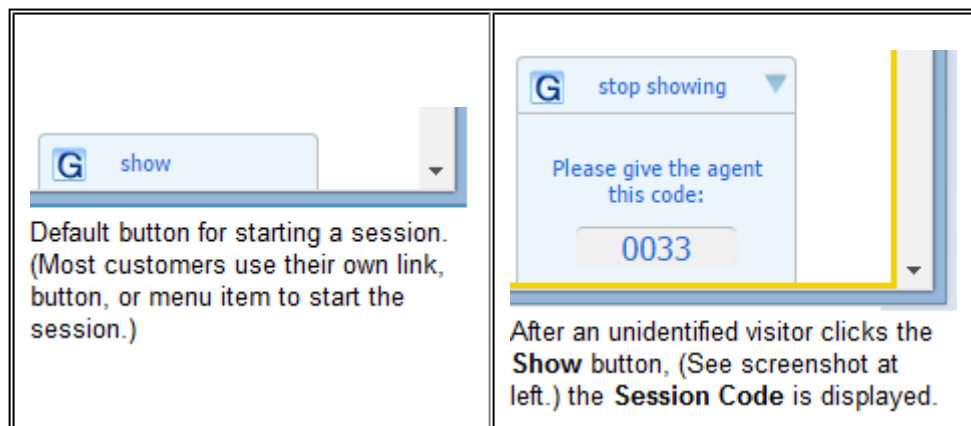


Default vs. custom UI

Glance provides a default cobrowse UI in a separate script file which is loaded automatically along with the visitor script. When implementing a custom UI, specify `data-ui="custom"cobrowse<script>` tag to prevent loading of the default UI script.

Session Code

Every cobrowse session has a **Session Code**. This is a unique session identifier available to both the visitor and agent, allowing the agent to connect to the correct visitor session. The code may be randomly generated and exchanged over the phone, or it could be assigned automatically via integration with the customer website, as explained below in the [Visitor ID](#) section.



Visitor ID

When the identity of a visitor is known to them, whether they are logged in or because of a unique cookie and the agent has access to this ID, it is more efficient to use this unique ID as a session code rather than a random number. Any identifying piece of information that is known about a visitor at the time a web page is generated can be used as



the [Session Code](#). The identifier is referred to as a **Visitor ID** and should be embedded on the webpage before the `cobrowse<script>` tag. It has the following format:

```
<script type="text/javascript">
  var GLANCE_COBROWSE = { visitorid: "[visitorid]"};
</script>
```

The **Visitor ID** can be any alphanumeric string up to 62 characters long. It should be either information that the visitor would know and can communicate to the agent over the phone (for example, a name, phone number, or email address) or an ID or account number that can be accessed by the agent.

To see how a **Visitor ID** can be incorporated with a customer relationship management (CRM) integration see: [Joining session through CRM integration](#).

Joining a Glance Cobrowse session

Customers can join a **Glance Cobrowse** session in the following two ways:

- Glance 3x client
- A stand-alone service
- CRM integration

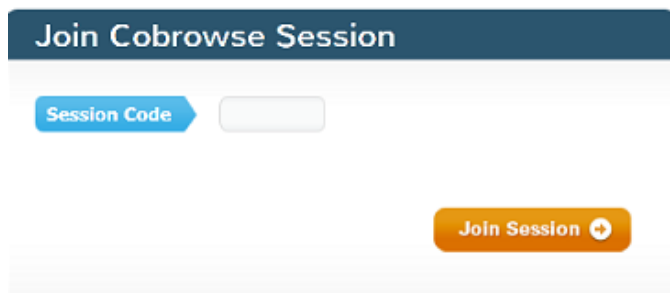
Joining a session using a stand-alone service

For customers who use **Glance Cobrowse** as a stand-alone service without CRM integration, agents should go to:

<https://www.glance.net/cbjoin> in order to join a cobrowse session.

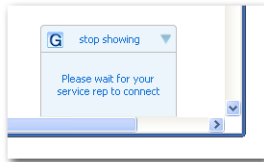
If not already logged in, the agent will be prompted to:

1. Log in using his or her [Glance Address and Password](#).
2. Enter the [Session Code](#) supplied by the website visitor.

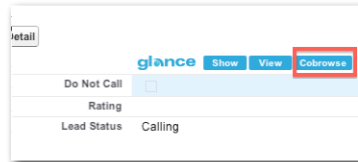


Joining a session through CRM integration

If you are using a CRM integration such as [Glance for Salesforce](#), you can join a session by setting up a field from a Lead, Contact, or Case Object as the [Visitor ID](#). Upon setup, the agent will be able to instruct a visitor to click the **Glance Cobrowse** button on the website, and subsequently the agent can click the cobrowse button from Salesforce and instantly be in the session together. This effectively eliminates the need of verbally transferring a key from visitor to agent.



Visitor



Agent

Single sign-on

Glance Cobrowse can be integrated into existing agent tools. In many instances, an agent has already logged into his or her CRM console such as Salesforce or Zendesk, and should not be required to log into **Glance Cobrowse** as well when joining a cobrowse session. **Glance Cobrowse** supports single sign-on functionality for these situations.

The following URL is an example that can be used to view a **Glance Cobrowse** session using single sign-on:

`http://glance.net/cobrowse/`

`AgentView.aspx?SessionKey=[nnnn]&partnerid=[pid]&partneruserid=[puid]&loginkey=[loginkey]`

See the [Glance Login Key for Single Sign-On](#) document for further details.

Masking

Masking can be configured from your [cobrowse settings](#) page. No customer website modifications are required to add or change masked field definitions.



Masked Elements

Glance masks page elements which match any of the CSS selectors specified here, as well as elements with class="glance_masked" or attribute glance_masked="true".

STAGING

PRODUCTION

#MainContent_wuLocationControl_ItZip	Edit	Delete
#SignonAccountNumber	Edit	Delete
#EmailAddr	Edit	Delete
#rtag	Edit	Delete
.search_box	Edit	Delete

1 2 3 4 5

CSS Selector:

Add

Publish Staging List to Production



Note: Be aware that if your website is modified, the css selectors for masked inputs may need to be updated.

You should run a cobrowse session on the new version of your website on a staging server to verify that all content is correctly masked. A best practice is to add an attribute `glance_masked="true"` to all inputs that should be masked. That way, even if the id or other attributes of the input element change, the input will continue to be masked.

Masking inputs

The contents of specific input fields, such as credit card number or password fields, can be masked from view by agents. **Masked inputs** can be identified by any CSS selector, including the `htmlnameorid` attribute. When a text input is masked, agents will see only asterisks in their view. Agents will not be able to see the status of masked dropdown boxes, radio buttons, or checkboxes.

Credit card:

Credit card:



Note In remote control mode agents cannot control masked inputs.

Masking elements

Non-input page elements can also be masked. Masking an element also masks any nested elements and input fields that are contained by the masked element. The dimensions of masked elements are preserved, but text content and images are removed. The values of `href` and `src` attributes are cleared and the contents of `<svg>` audio and video tags are removed.



Custom integration

For more custom integration options, please refer to the [Glance Cobrowse API Guide](#).

Upgrades

This section includes information about website and **Glance Cobrowse** upgrades.

Your website upgrades

Whenever you make changes to your website, a best practice is to verify that **Glance Cobrowse** functions correctly on the modified portions of your website. To ensure that cobrowse functions correctly, please verify the following:

- New pages have been tagged with the cobrowse script tag.
 - New iframes have been tagged with the cobrowse script tag. (This is a common source of issues.)
 - New sensitive information or form fields are masked.
 - If there are hover states in the new website areas, contact [Glance Support](#) to ensure that hover states will be reflected on the agent side during cobrowse sessions.
 - If there are new custom fonts or icons that are not accessible from your website via a cross-origin request, contact [Glance Support](#) and **Glance** can host them on their CDN for access by cobrowse agents.
-

Glance Cobrowse upgrades

Several times per year, **Glance** releases a new version of the cobrowse visitor side JavaScript files. In general, upgrades require no code or configuration changes on the part of the customer. How the upgrade takes place depends on whether you are using the **Glance** CDN to serve the scripts, vs. hosting the scripts yourself.

Using the CDN (most customers)

If your site uses the **Glance** CDN to serve the visitor side cobrowse JavaScript files, **Glance** will first push the upgrade to your staging site where you can verify that the new scripts work correctly. Once verification is complete, **Glance** will push the upgrade to your production site.

You will be notified via email at least one week in advance when a staging site upgrade is scheduled. You will be given at least two weeks to validate the release before your production site is upgraded as well.

If you prefer, you can arrange an alternative upgrade schedule with **Glance**. When you receive notification that a new release is available, contact [Glance Support](#) to schedule your upgrade.



Upgrading self-hosted cobrowse script

Customers who host their own scripts simply need to download the new scripts from the **Glance** CDN as described in the [Self hosted script](#) section of this document, followed by updating their staging or production sites to reference the new scripts.

What's in a release

Release notes are published for every new release, detailing the new features and bug fixes. You can use the release notes to guide your testing and to take advantage of new features available in the product.

Supported versions

Glance supports the current release and one previous version. Best practice is to adopt new releases once they become generally available.

If something goes wrong

Releases have been through internal Q&A as well as beta testing with select customers before they are made available. However, each customer website is different, and there is always the possibility of an incompatibility. If you upgrade **Glance Cobrowse** and experience a problem that did not occur with the previous release, you can revert back to the previous version while the issue is resolved.

Need more help?

- Visit the [Glance support home page](#).
- Contact **Glance Support**:
 - support@glance.net
 - (1) (877) 452-6236 Domestic
 - (1) (781) 646-8505 International

