



PureConnect®

2023 R3

Generated:

09-November-2023

Content last updated:

15-March-2019

See [Change Log](#) for summary of changes.



# IPA Work Item Client

## Printed Help

### Abstract

The IPA Work Item Client is the part of the IPA Stand-Alone Web Client that enables you to complete tasks that are part of a process. Work items represent these tasks. A work item is a form that gathers information. Work items could represent the tasks involved in processing a customer order, a loan application, an insurance claim, or other form of work.

For the latest version of this document, see the PureConnect Documentation Library at: <http://help.genesys.com/pureconnect>.

For copyright and trademark information, see [https://help.genesys.com/pureconnect/desktop/copyright\\_and\\_trademark\\_information.htm](https://help.genesys.com/pureconnect/desktop/copyright_and_trademark_information.htm).

# Table of Contents

Table of Contents	2
What's New	3
IPA Work Item Client Basics	4
Log on	4
Change password	6
IPA Work Item Client interface	6
Set user status	8
Activate workgroup status and display queues	8
Requirements	8
Log off and exit	9
Processes	10
Search for a process	10
Start a process	11
Requirements	11
Work items	13
Pick up a work item	13
Put a work item on hold	14
Transfer a work item	14
Licenses and Other Conditions	14
Customize a work item view	15
Work item reminders	16
Work item states	17
Work item views	17
Reference	18
IPA licenses	18
IPA user rights	18
Miscellaneous topics	19
Change log	20

## What's New

*Note:* The CIC product suite has a new distribution model with new naming, faster release cycles, and higher quality. CIC 4.0 SU 6 was the last release using the older model. CIC 2015 R1 is first of the new releases. CIC 2015 R1 or later can be applied to any CIC 4.0 SU.

# IPA Work Item Client Basics

This section contains the information to get started, set your status appropriately, and understand the interface.

- [Log on](#)
- [Interface](#)
- [Set user status](#)
- [Activate workgroup status and display queues](#)
- [Log off](#)

## Log on

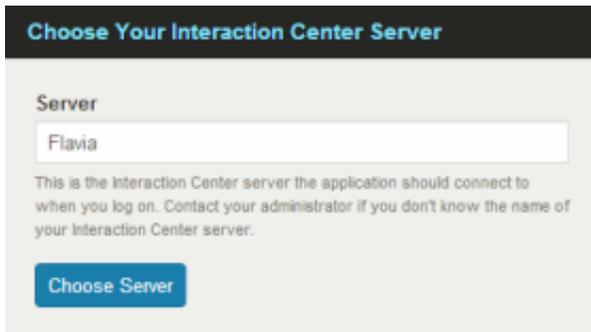
You log on to IPA Work Item Client without specifying a station.

*Note:* You cannot log on to IPA Work Item Client and a CIC client at the same time.

1. Point your browser to the logon page.

*Tip:* Your CIC administrator can supply the URL for the logon page.

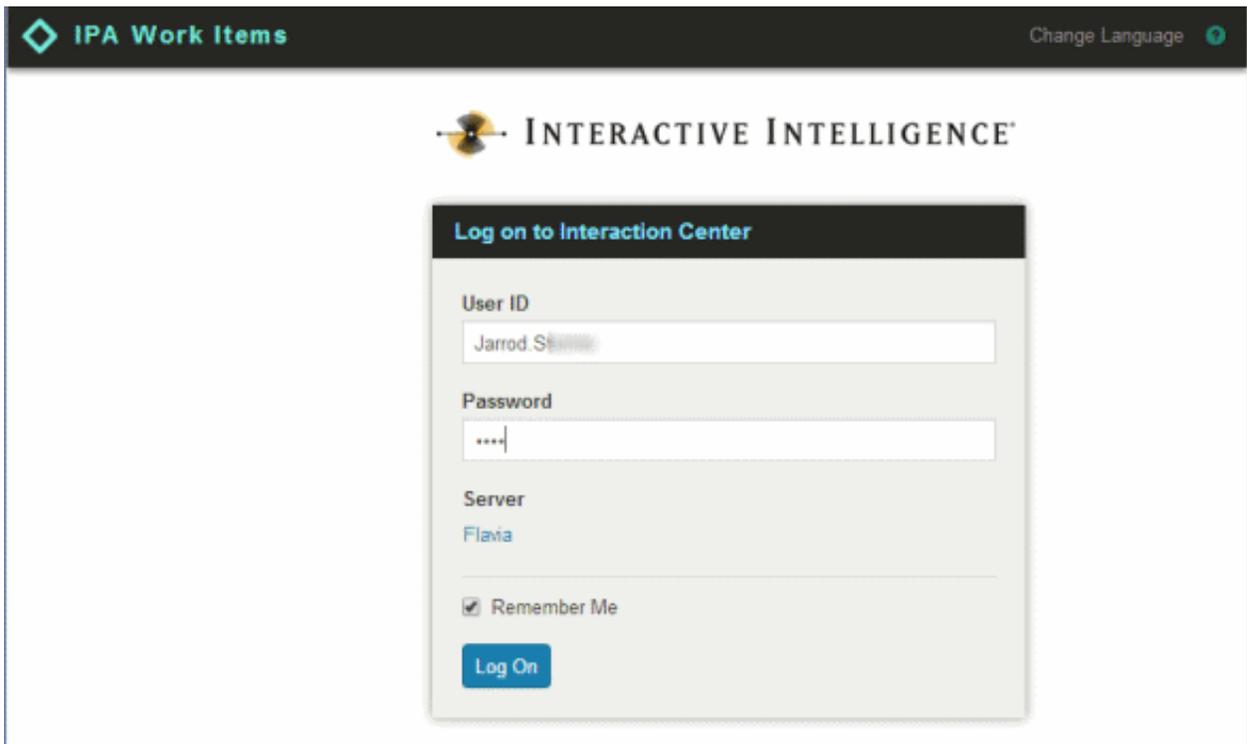
2. If your organization uses more than one IC server, in the **Choose Your Interaction Center Server** dialog box, type the name of the appropriate IC server in the **Server** text box. Click **Choose Server**.



*Note:* If your organization uses only one IC server, you do not see this dialog box.

*Result:* The **Log on to Interaction Center** dialog box appears.

3. In **User ID** and **Password**, enter your CIC user account name and password as configured in Interaction Administrator.



4. Optionally, select the **Remember me** check box.

*Result:* The next time you log on, the logon page fields default to the last-used values, except for **Password**.

*Note:* If you also use the browser feature that remembers passwords, **Password** also defaults. Client-side cookies store these settings. If you clear cookies, "Remember me" does not "remember" your logon settings.

*Tip:* Contact your CIC administrator if you must change your password.

5. Optionally, in the Application bar, click **Change Language**. In the **Language Settings** dialog box, select a language for the interface text, and then click **Change Language**.



*Note:* The **Language Settings** dialog box lists only the language packs installed on your IC server.

*Tip:* Your browser language setting controls the format used for date, time, currency, and number values.

6. Click **Log on**.

*Result:* You log on to Customer Interaction Center. Your CIC user name appears in the IPA Work Item Client Application Bar. Other CIC users can view your user status and logon state in any CIC client Company Directory view.

## Change password

You have two ways to change your Customer Interaction Center (CIC) password:

- Contact your CIC administrator and request that the administrator change your password.
- Use the Telephone User Interface.

**Tip:** The *Telephone User Interface Quick Reference Card* and the *PureConnect TUI User's Guide* are available in the PureConnect Documentation Library under Quick Reference Materials.

## IPA Work Item Client interface

You manage work items and start processes in IPA Work Item client using the various elements of its interface. You can change your Customer Interaction Center (CIC) status or manage your workgroup activation status. You can also add, arrange, and customize workgroup queue views.

The screenshot displays the IPA Work Items client interface. At the top, the title bar shows 'IPA Work Items' and the user 'Noreen Tasker'. Below the title bar, there is a navigation bar with several elements: a status indicator (3), a dropdown menu (4) set to 'Available', a timer (5) at '01:53:35', a list icon (6), a refresh icon (7), a 'Reminders' section (8) with a count of 0, a 'Start Process' button (9), and a search bar (10) labeled 'Search Processes'. The main area is divided into two sections: 'My Work Items' and 'IPAWorkgroup x' (15). The 'My Work Items' section contains a table with columns: Description, Category, Due Date, State, and Interaction Id. Two items are listed: ID: 11332 (12) with state 'In progress' and ID: 11333 with state 'New'. The 'IPAWorkgroup x' section (15) contains a 'Transfer' button (14) and a 'Pickup' button (11). A settings gear icon (13) is located in the top right corner of the table area.

Description	Category	Due Date	State	Interaction Id
ID: 11332	TestProcess	6/25/14 3:29 PM	In progress	1001757627
ID: 11333	TestProcess	6/25/14 3:29 PM	New	1001757628

1	<b>User name</b>	<p>Displays the CIC display name of the currently logged on user. Your display name can be different from the user name or ID you use to log on.</p> <ul style="list-style-type: none"> <li>■ To log off, click your user name or the down arrow next to your name.</li> <li>■ To display the IPA Work Item Client version number, your server version number, and other company information, click the down arrow next to your name and then click <b>About</b>.</li> </ul>
2	<b>Help icon</b>	Search and view help for IPA Work Item Client.
3	<b>Ribbon control</b>	Reserved for future use.
4	<b>My Status drop-down list</b>	Displays your CIC user status and enables you to change your status.
5	<b>Time in status</b>	Displays how long you have spent in your current status.
6	<b>Status details</b>	Set status details such as a Forward Number, Until Date or Time, and Notes.
7	<b>Workgroup activations</b>	Change your workgroup activation status and display selected workgroup queue views.
8	<b>Reminders</b>	Displays a list of your current reminders. The number of your current reminders appears to the right of this control.
9	<b>Start Process</b>	To select and start a process, click <b>Start Process</b> . To select and start a process from a list of the ones you have most recently started, click the down arrow.
10	<b>Search Processes</b>	Search for and view information about currently running and completed process instances.
11	<b>My Work Items view</b>	Displays the work items currently assigned to you.
12	<b>Selected work item</b>	Your currently selected work is highlighted.
13	<b>Choose columns</b>	Choose the columns contained in the <b>My Work Items</b> and workgroup queue views.
14	<b>Queue control toolbar</b>	To pick up, hold, or transfer a work item, select a work item and then click the appropriate button.
15	<b>Workgroup queue view</b>	<p>If you have the appropriate <b>View Workgroup Queue</b> rights, you can display views of the work items in selected workgroup queues.</p> <p><i>Note:</i> You can close a workgroup queue view by clicking the "x" on its tab.</p>

## Set user status

To receive ACD-routed work items, set your user status to an "Available" type. You also need the appropriate IPA license. CIC client users can see your user status in the Company Directory view.

1. Click the **My Status** drop-down list.
2. Select a status from the list.
3. Optionally, enter status details by clicking **Status Details**. Supply any required information and then press **Enter** to close the pop-up window.

*Note:* The status you select determines which fields are available.

<p><b>Notes</b></p>	<p>Enter any additional information for the selected status.</p> <p>As a convenience, the notes from the last time you selected this status appear in <b>Notes</b>. You can make any necessary changes to these notes.</p> <p><i>Requirements:</i> To create or modify status notes, you need the <b>Status Notes Security</b> right.</p>
<p><b>Forward Number</b></p>	<p><b>Forward Number</b> appears only for selected statuses such as <b>Available, Forward</b>. Enter a telephone forwarding number.</p> <div style="border: 1px solid black; padding: 5px; background-color: #f0f0f0;"> <p><i>Note:</i> The last forwarding number you used for this status appears in the Forward Number box.</p> </div>
<p><b>Until Date</b> <b>Until Time</b></p>	<ul style="list-style-type: none"> <li>■ To set the <b>Until Date</b>, click in the text box. Select a date from the displayed calendar.</li> <li>■ To set the <b>Until Time</b>, click in the text box and select a time from the drop-down list.</li> </ul> <p><i>Note:</i> Incoming calls hear the date and time you select.</p>

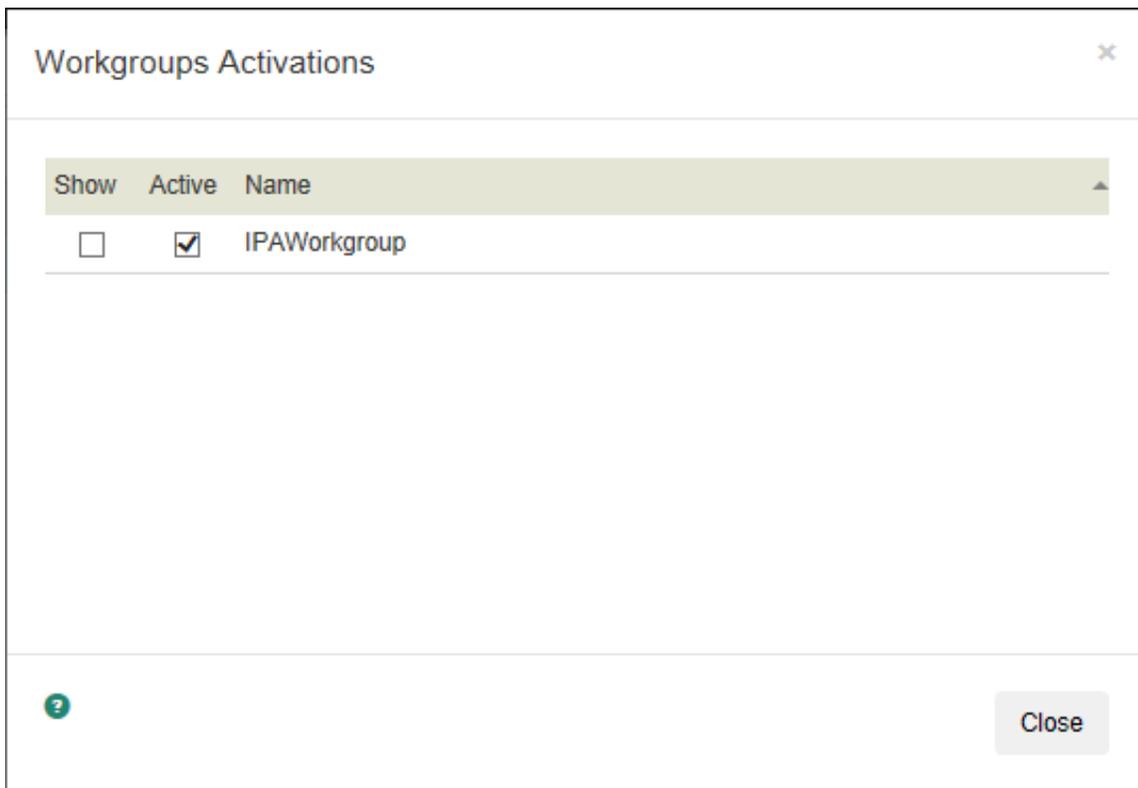
# Activate workgroup status and display queues

To receive ACD-routed work items, log on to Customer Interaction Center (CIC), set your workgroup activation status to **Active**, and set your user status to an "Available" type. You also need the appropriate IPA license.

## Requirements

- To change your workgroup activation status, you need the "Activate self" Access Control right for the selected workgroup. You must also be a member of that workgroup.
- For the workgroup queue view to be available, the workgroup must have an **ACD queue** and the CIC administrator must configure the workgroup as "Active."
- To display a workgroup queue view, you need the **View Workgroup Queues** right for the designated workgroup.

1. Click **Workgroup activations**.



2. In the **Workgroups Activations** dialog box, do any of the following:

- To display a workgroup queue view, in the **Show** column, select the appropriate check box. Or clear it to hide the view.

*Note:* A workgroup queue view displays only the **alerting** work items in this queue.

- To activate your workgroup status, in the **Active** column, select the appropriate check box. Or clear it to set your status to inactive.

3. Click **Close**.

## Related topics

[IPA licenses](#)

[IPA user rights](#)

## Log off and exit

You do not receive any ACD-routed work items when you are not logged on to Customer Interaction Center (CIC). However, you can still receive direct-routed work items.

1. Click your user name or the down arrow next to it.
2. Click **Log Off**.

*Result:* The IPA Work Item Client browser window does not close and you return to the logon page. Also, logging off IPA Work Item Client closes any open Work Items and puts them on **hold**.

# Processes

A process is a defined, ordered series of actions taken to achieve a specific end result. A process prompts IPA Work Item Client users to complete work as part of a process. Processes can also perform actions that involve accessing websites. For example, a process could access a website to look up required information, such as a vehicle's VIN number. The administrator who designs a process determines what actions occur during a process.

For example, your company could have a loan application process that requires several steps. IPA Work Item Client users or automated Customer Interaction Center (CIC) functions perform these steps. The process includes actions for collecting, verifying, and evaluating information in the loan application. The process continues as an agent accepts or rejects the application. The process ends by automatically notifying the applicant of the decision.

*Note:* For information about designing processes, see the *Interaction Process Automation Technical Reference* and the *Interaction Process Automation Designer Help*.

## Search for a process

You can search for a specific process instance or display a list of selected process instances. You can then view information about each process and its status.

1. Click **Search Processes**.
2. In the **Search Processes** dialog box, in the text box, type all or part of a process variable value and then click the **Search** button.

*Tips for using process variables:*

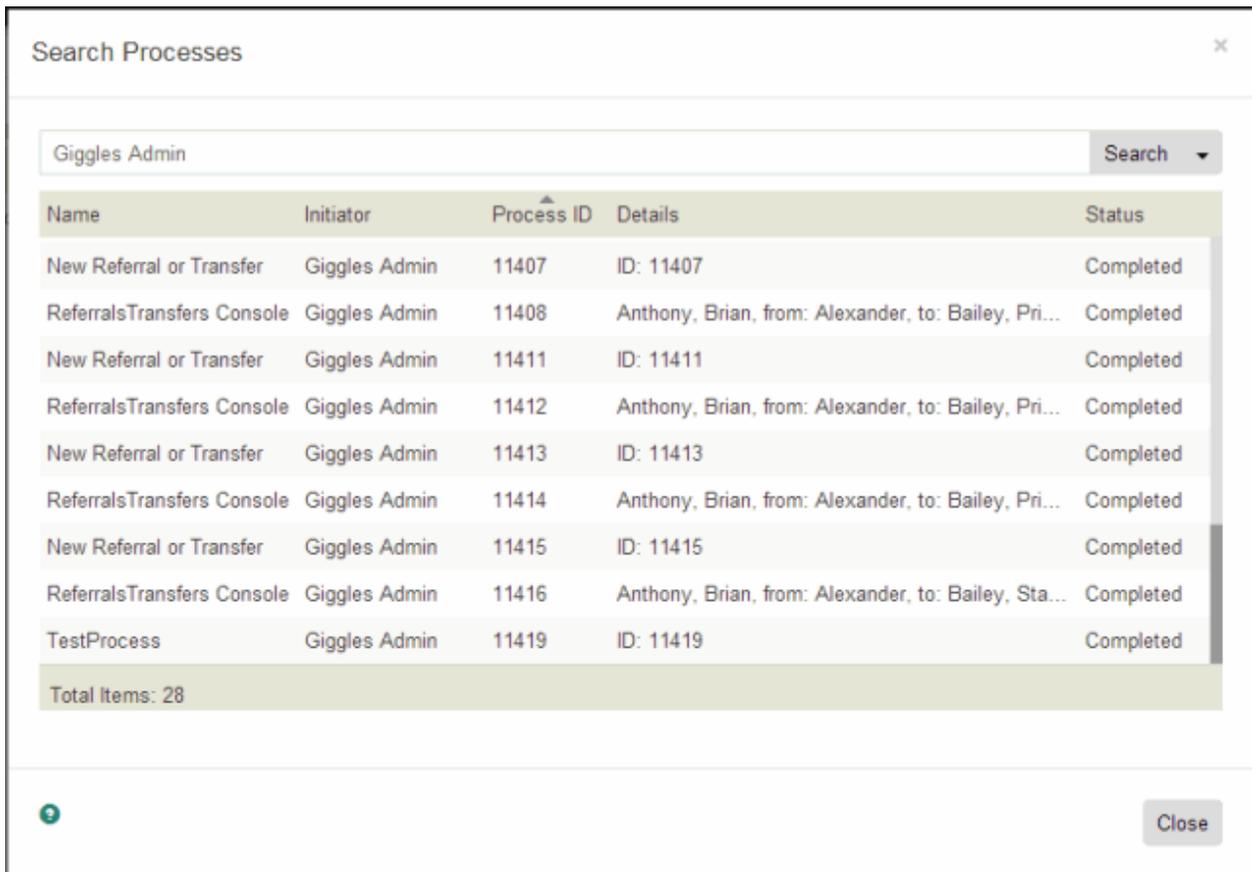
- Process variables include the process ID, the name of the user who started the process (initiator), and process-specific details such as a customer's ID number.
  - Process variables can be different for each process. Your organization's process designer defines the variables.
  - To search by name, type all or part of a user's display name. (The CIC administrator controls the formatting of display names.)
  - A process variable search uses "Begins with" syntax. For example, you can enter just the first few characters of a name or identification number for a search.
2. Optionally, set more search parameters:
    - a. Click the **Search** button down arrow.
    - b. From the **Process** list, select **All** or the name of a specific process.
    - c. From the **Initiated** list, select a time period.

*Tips for using advanced search criteria:*

- The search uses these advanced search criteria and the criteria in the search text box to the left of the **Search** button.
- All of the advanced search criteria apply to all future searches until you change them.

3. Click the **Search** button.

*Result:* A list of matching processes appears.



The screenshot shows a dialog box titled "Search Processes" with a search input field containing "Giggles Admin" and a "Search" button. Below the search bar is a table with the following columns: Name, Initiator, Process ID, Details, and Status. The table contains 9 rows of data, all with "Giggles Admin" as the initiator and "Completed" as the status. The first row is "New Referral or Transfer" with Process ID 11407. The next two rows are "ReferralsTransfers Console" with Process IDs 11408 and 11412, and details "Anthony, Brian, from: Alexander, to: Bailey, Pri...". The next two rows are "New Referral or Transfer" with Process IDs 11411 and 11413. The next two rows are "ReferralsTransfers Console" with Process IDs 11414 and 11416, and details "Anthony, Brian, from: Alexander, to: Bailey, Pri...". The final row is "TestProcess" with Process ID 11419. Below the table, it says "Total Items: 28". At the bottom right of the dialog box is a "Close" button.

Name	Initiator	Process ID	Details	Status
New Referral or Transfer	Giggles Admin	11407	ID: 11407	Completed
ReferralsTransfers Console	Giggles Admin	11408	Anthony, Brian, from: Alexander, to: Bailey, Pri...	Completed
New Referral or Transfer	Giggles Admin	11411	ID: 11411	Completed
ReferralsTransfers Console	Giggles Admin	11412	Anthony, Brian, from: Alexander, to: Bailey, Pri...	Completed
New Referral or Transfer	Giggles Admin	11413	ID: 11413	Completed
ReferralsTransfers Console	Giggles Admin	11414	Anthony, Brian, from: Alexander, to: Bailey, Pri...	Completed
New Referral or Transfer	Giggles Admin	11415	ID: 11415	Completed
ReferralsTransfers Console	Giggles Admin	11416	Anthony, Brian, from: Alexander, to: Bailey, Sta...	Completed
TestProcess	Giggles Admin	11419	ID: 11419	Completed

# Start a process

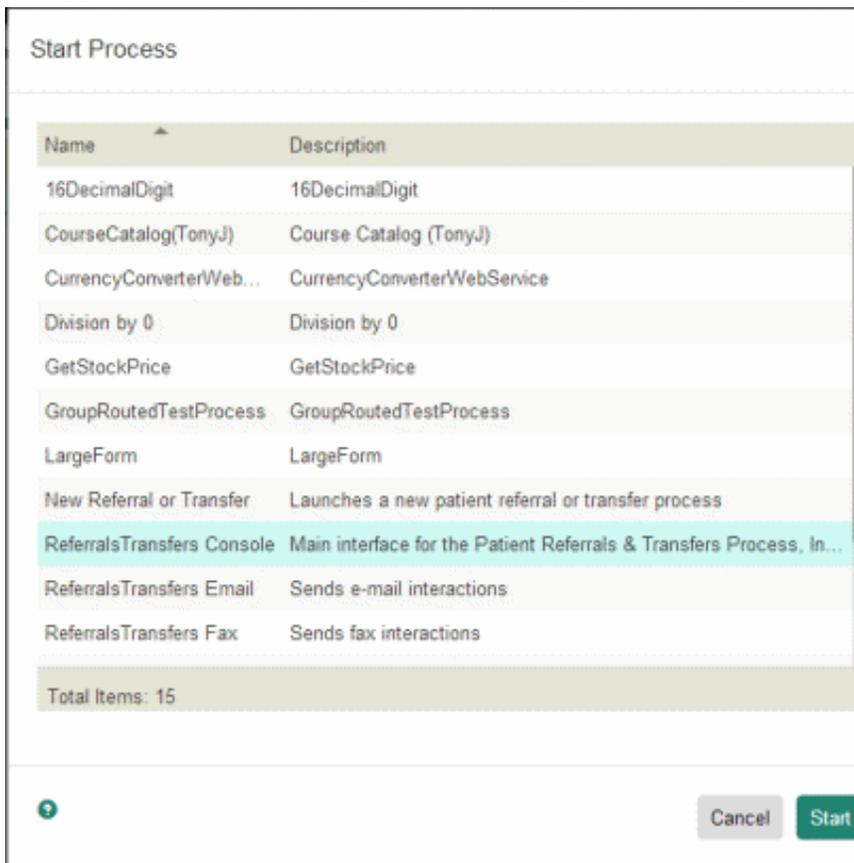
To start a process, you need the appropriate IPA license and user rights. If the option is available and appropriately configured, visitors to your company's website could also start processes.

## Requirements

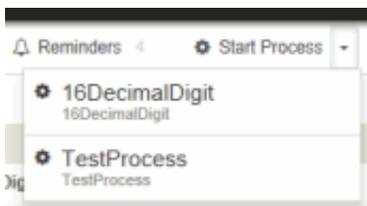
Set your status to an "Available" type before starting a process.

Do one of the following:

- Click **Start Process**. In the **Start Process** dialog box, select a process and click **Start**.



- Click the **down arrow** next to **Start Process**. From the list of processes you have recently started, click a process name.



*Result:* Interaction Process Automation routes the first work item in the process. If IPA routes the first work item back to you, IPA alerts you to pick up a work item.

## Related topics

[IPA licenses](#)

[IPA user rights](#)

# Work items

A work item is a form used to gather information. When someone starts a process, a work item appears in a user or workgroup queue. Work items assigned to you appear in your **My Work Items** view. You can also see work items in any workgroup queue views that you monitor.

If you have the appropriate IPA license, user rights, and the IPA Security Specification for all required data on the work item, you can do any of the following:

- Pick up a work item
- Put a work item on hold
- Transfer a work item

## Related topics

[IPA licenses](#)

[IPA user rights](#)

[Pick up a work item](#)

[Put a work item on hold](#)

[Transfer a work item](#)

## Pick up a work item

A work item represents one step in a process. You pick up a work item to complete part of a process.

In the **My Work Items** view, you can pick up any of your assigned work items. If you have permission to modify the workgroup queue in which the work item appears, you can pick up a work item from a workgroup queue.

1. In **My Work Items** or a workgroup work items view, select a work item that is in a New, ACD - Wait Agent, or Held state, and click **Pickup**.

*Result:* The work item appears in the Work Item Viewer.

*Tip:* Click the Help icon in the Work Item Viewer for more information.

2. Do one of the following:

- Perform the required action.

*Result:* The work item state changes to **Completed**. After you complete a work item, it continues to appear in the **My Work Items** view for a limited time.

*Note:* Picking up a work item prompts you to perform a step in the workflow process. The type of action depends entirely on how your organization's designer constructed the process.

- Put the work item on hold.

*Result:* The work item state changes to **Held**. It remains in the **My Work Items** view.

## Related topics

[Work item states](#)

## Put a work item on hold

You can put a work item on hold and later pick up this work item to continue working with it.

To put a work item on hold, do one of the following:

- Click **Hold** in the Work Item Viewer title bar.
- If available, click **Cancel**, **Exit**, or a similarly named control in the work item.

*Note:* Canceling a work item discards any changes you have made.

**Result:** The work item state changes to **Held**. It remains in the My Work Items view. The work item remains on hold until you pick it up again.

**Warning:** If you click the X in the Work Item Viewer title bar and then click **Leave this Page**, you can close a work item and put it on hold. However, you lose any changes you have made to the work item form. Logging off the IPA Work Item Client also closes any open Work Items and puts them on hold.

## Transfer a work item

You can transfer a work item to another user or workgroup queue.

*Note:* Interaction Supervisor users can transfer work items that are not on **Hold**, if necessary to continue a process. If a supervisor transfers a work item while an agent has that work item open, then any data changed or entered by the agent can be lost.

---

## Licenses and Other Conditions

- You need the right to transfer an interaction for the queue in which the work item appears.
  - You can transfer work items only to other IPA-licensed users or to a workgroup with at least one IPA-licensed user.
  - If you transfer a work item to a workgroup, the target workgroup must have an associated queue.
  - You can transfer only work items that are in a **New**, **ACD - Wait Agent**, or **Held** state. You cannot transfer a completed work item or a work item you are viewing or revising (**In Progress** state).
1. In the My Work Items view or the appropriate workgroup queue view, select a work item that is in a **New**, **ACD - Wait Agent**, or **Held** state.
  2. Click **Transfer**.

*Result:* The **Transfer** dialog box appears.



3. Optionally, from the **Options** drop-down list, select **Users**, **Workgroups**, or both.

*Tip:* The Options drop-down list limits your search for a transfer recipient to either users or workgroups or both. You cannot transfer a work item to a phone, station, station group, or attendant profile, so these search criteria do not appear.

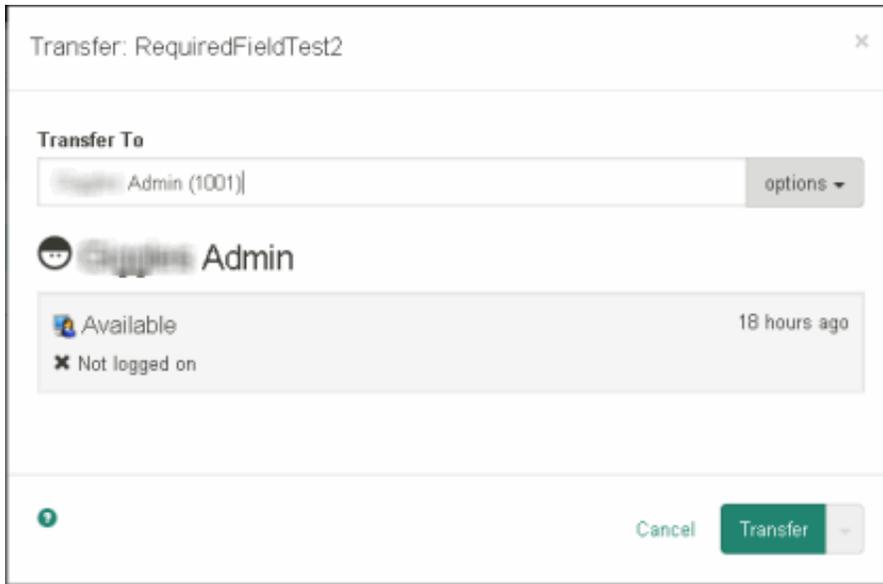
4. In the **Transfer To:** text box, type all or part of the recipient's name or extension number.

*Result:* A drop-down list of choices appears.

*Tip:* If the drop-down list does not contain the expected transfer recipient, check the search criteria selected in **Options** and adjust them if necessary.

5. From the drop-down list, select the appropriate recipient.

*Result:* Status information appears for the selected user or workgroup, including whether a selected user is logged on and is available to accept the transferred work item. If the selected recipient is a workgroup, it shows how many interactions are in the workgroup queue, how many agents are logged on and how many agents are available.



Transfer: RequiredFieldTest2

Transfer To

Admin (1001) options

Admin

Available 18 hours ago

Not logged on

Cancel Transfer

#### 6. Click **Transfer**.

*Result:* Customer Interaction Center (CIC) removes the work item from your **My Work Items** view or workgroup queue where you selected it and routes it to the selected agent or workgroup.

*Important:* Certain work item settings are no longer in effect after a transfer. For example, a work item's timeout setting controls how much time an agent has to pick up an alerting work item before CIC routes it to another agent. This time limit no longer applies to a transferred work item because the transfer signals the work item is "being handled" or "under an agent's control."

#### Related topics

[Work item states](#)

## Customize a work item view

You can change the appearance of the My Work Items view or a workgroup work item view.

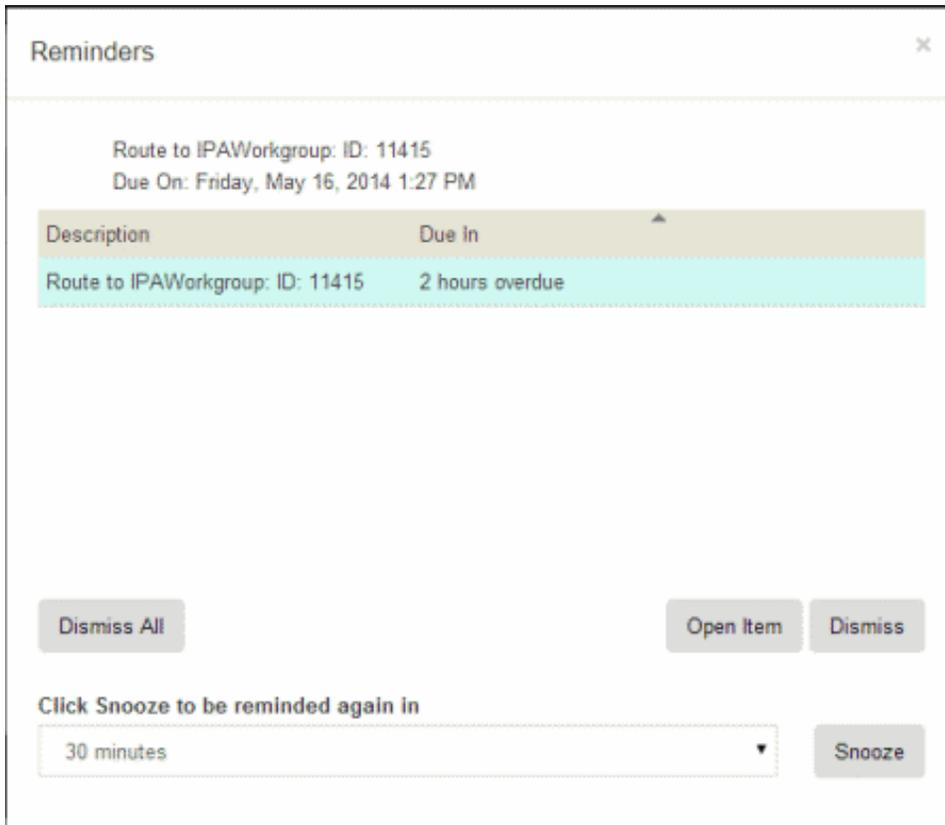
Do any or all of the following:

- Sort a work item view by clicking any of the column headings. To sort in ascending order, click once. To sort in descending order, click again on the same heading.
- Rearrange columns by dragging and dropping a column heading.
- Resize a column by pointing to the edge of a column heading, then click and drag.
- Add or remove columns by clicking the **Choose Columns** control. Then select or clear the appropriate column check boxes.

## Work item reminders

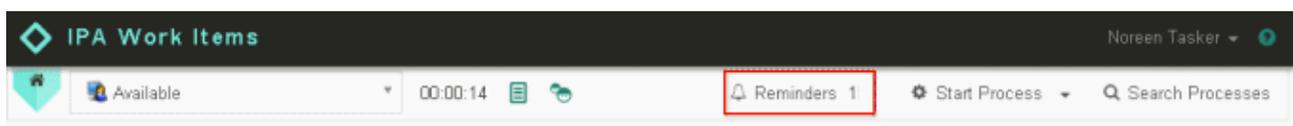
Your organization's process designer can build in both due dates and reminders that occur in advance of the due date for work items. IPA Work Item Client reminds you in several ways when a work item due date is approaching or has past:

- When a reminder threshold occurs, a dialog appears that provides the opportunity to snooze, dismiss, or open the work item.
- When you log on, any reminders for work items in your queue appear automatically in the **Reminders** dialog box.



Do any of the following:

- To sort the list, click a column heading.
  - To view a reminder's due date, select it.
  - To pick up the associated work item and open it in the **Work Item Viewer**, select a reminder and click **Open Item**.
  - To clear this reminder, select it and click **Dismiss**.
  - To clear all reminders, click **Dismiss All**.
  - To postpone a reminder, select a reminder and, after selecting an appropriate interval in the associated drop-down list, click **Snooze**.
- You can view your current reminders by clicking **Reminders**. The number of your current reminders appears to the right of this control.



## Work item states

A work item state is the current condition of a work item.

State	Description
New	Customer Interaction Center (CIC) has routed this work item to an <b>agent</b> or one agent has transferred it to another agent. The recipient has not yet picked up the work item. New work items appear in <b>bold</b> in a queue view. <i>Note:</i> You have a limited time to pick up a new ACD-routed work item before CIC reroutes it to another agent or workgroup.
ACD - Wait Agent	Customer Interaction Center (CIC) has routed this work item to a <b>workgroup</b> or an agent has transferred it to a workgroup. No agent has yet picked up this work item.
In Progress	An agent has picked up this work item. The work item remains in this state until the agent completes the work item or puts it on hold.
Held	An agent has picked up a work item then put it on hold by clicking the red "X" or Hold button in the Work Item Viewer. <i>Note:</i> If you put a work item on hold, it is still assigned to you and remains in your queue. If you do not belong to the necessary IPA security specification for required data in the work item, CIC can put the work item on hold automatically.
Completed	After you or another agent finish a work item, its state changes to Completed. Completing a work item usually means supplying all the required information for a form or approving or verifying a form. <i>Note:</i> After a certain amount of time, around 30 seconds, a Completed work item disappears from the queue and the My Work Items view.

## Work item views

The **My Work Items** view displays the work items that are currently in your user queue. These work items are assigned directly to you or ACD-routed to you from a workgroup to which you belong. This view appears by default. You cannot remove or hide this view. You can also display a work item view for any workgroup to which you belong and have the appropriate rights.

You can pick up, transfer, or put a work item on hold by selecting it and clicking the appropriate toolbar button. After you complete a work item, it continues to appear in the **My Work Items** view for a limited time.

If you do not immediately pick up an ACD-routed work item, it remains in the **My Work Items view** for a limited time. Then Customer Interaction Center (CIC) routes it to another member of your workgroup or other qualified agent. If the CIC administrator revokes your IPA license, any ACD-routed work items that are in your user queue remain until you process them. However, CIC does not route any new work items to you.

### Related topics

[Activate workgroup status and display queues](#)

# Reference

## IPA licenses

The following licenses enable you to use IPA features. Your Customer Interaction Center (CIC) administrator assigns licenses. Each license in this list enables you also to **use the IPA features included in all the previous licenses in the list**. That is, the Group Routed Work Items license includes the Direct Routed Work Items license. The Process Monitor license includes both of the Routed Work Items licenses. The Process Designer license includes all the other licenses.

<b>Direct Routed Work Items</b> (I3_ACCESS_IPA_USER)	Enables you to start any process to which you have rights. It also enables you to receive Work Items that CIC directly routes to you.
<b>Group Routed Work Items</b> (I3_ACCESS_IPA_USER_ACD)	Enables you to receive Work Items that CIC routes to a workgroup to which you belong (similar to an ACD queue).
<b>Process Monitor</b> (I3_ACCESS_IPA_MONITOR)	Enables you to view process status and details in the IPA Process Monitor or to use IPA Process Reporting in IC Business Manager Applications.
<b>Process Designer</b> (I3_ACCESS_IPA_DESIGNER)	Enables you to use IPA Process Designer to create and modify IPA processes or to use IPA Process Reporting in IC Business Manager Applications.

### Related topics

[IPA user rights](#)

## IPA user rights

The following user rights enable you to handle work processes and items.

<b>Activate self</b>	This right enables you to change your workgroup activation status. You must be a member of the workgroup. The CIC administrator must also configure the workgroup as <b>Active</b> and it must have an ACD queue.
<b>Launch Processes</b>	<div style="border: 1px solid gray; padding: 5px; background-color: #f0f0f0;">Enables you to start a process.</div> <p><i>Note:</i> Your organization's IPA process designer must publish the process before you can start that process.</p>
<b>Manage Processes</b>	Enables you to manage and modify processes in the IPA Monitor. Managing a process includes canceling or retrying a process, changing data elements in a process, and so on.  <i>Note:</i> IPA Monitor is a separate application. It is an IC Business Manager module that an administrator can use to monitor, track, or interact with running process instances. For more information, see the <i>Interaction Process Automation Monitor Help</i> .
<b>Modify Workgroup Queues</b>	To manage work items on a displayed workgroup queue, you need the Modify Workgroup Queues right. Your CIC administrator can individually assign the rights to <b>Hold</b> , <b>Pickup</b> , and <b>Transfer</b> work items in a selected queue.
<b>View Processes</b>	Enables you to search for and view processes.  <i>Note:</i> You automatically have view rights to any process you started.
<b>View Workgroup Queues</b>	This right enables you to display the queue view for a designated workgroup.

### Related topics

[IPA licenses](#)

## Miscellaneous topics

## Change log

Date	Changes
25-June-2015	Rebranded documentation to reflect new ININ logo and colors.
19-January-2018	Rebranded documentation to reflect Genesys logo and product terminology and names.
15-March-2019	Created this change log.