



IPA Work Item Viewer

Printable Help

Interactive Intelligence Customer Interaction Center® (CIC)

2016 R1

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Abstract

The IPA Work Item Viewer is the part of the IPA Stand-Alone Web Client that enables you to view and complete work items. 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.

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IPA Work Item Viewer

Work Item Viewer

A work item is a form used to gather information. It represents one step in a process. Work items can contain multiple pages. Clicking **OK** or a similarly named button can either close a work item or display the next page. After you complete an assigned work item, the process could generate a new work item and send it to the appropriate agent or workgroup to continue the process.

When you pick up a work item, it appears in the IPA Work Item Viewer. Your organization's process architect designs the forms and controls the content of a work item. The form type and content also depend on the process that generates the work item.

The screenshot shows a web browser window displaying a form titled 'IPA Work Item Viewer'. The browser's address bar shows the URL 'cl-ubuntuws1.dev2000.com:7000/webic_workitemclient_team_i'. The form itself has a 'Hold' button with a question mark icon. Below this, there are three sections of form fields: '1a: Unsecured Text', '1b: Unsecured Edit Box' (with an empty text input field), '2a: Secured Text', '2b: Secured Edit Box' (with an empty text input field), and '3: Secured Required Edit Box' (with a yellow highlighted text input field and an asterisk). At the bottom of the form are 'OK' and 'Cancel' buttons.

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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.

Work item tips

Although work items vary in form and content, here are some tips for completing a work item:

Hold

- Putting a work item on **hold** saves the current data.

Note: Putting a work item on hold does not save **invalid** data. The last known valid value, if any, for a field containing an error appears when you pick up the work item again.

- Logging off the IPA Work Item Client closes any open Work Items and puts them on **hold**.

Closed

- A work item could seem to close on its own for various reasons. For example, a supervisor can transfer a work item from you to another agent while you are working on it.

Data

- A background color indicates a **required** field.
- An asterisk (*) indicates an empty **required** field.
- IPA security specifications can restrict access to some data.
- Highlighting and an exclamation point indicate a data entry **error**.

Tip: Pointing your cursor to this exclamation point reveals a tooltip that can help you correct the error.

Note: The IPA Work Item Viewer can indicate errors while you make an entry or only after you move to the next field.

Buttons

- **Cancel** or similarly named buttons are always enabled.
- **Submit**, **OK**, or similarly named buttons are enabled only when all the required fields contain valid entries.

Related topics

IPA security specifications

IPA security specifications

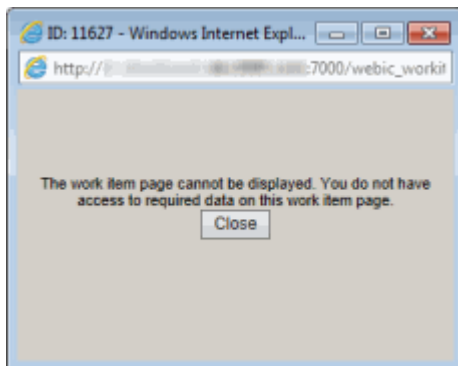
IPA security specifications control access to secured data in work items. For example, your Customer Interaction Center (CIC) administrator can limit the ability to view or edit social security numbers or credit card numbers to agents who are members of the appropriate IPA security specification.

Note: Your CIC administrator configures IPA security specifications and assigns them to users. Contact your CIC administrator if you have questions about IPA security specifications.

When IPA routes a work item containing secured data to you, one of the following can happen:

- If you **belong** to the necessary IPA security specifications for **all the required** data fields or controls in the work item, you see the work item. The Work Item View obscures any **non-required** data fields that require a security specification to which you do not belong.
- If you **do not belong** to the necessary IPA security specification for any of the **required** data in the work item, you see a warning. IPA places the work item on **hold**.

Tip: You can transfer the work item to a user who belongs to the appropriate security specification or ask your CIC administrator to assign you to the necessary security specification.



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Glossary

A

action: The smallest unit of work. A process consists of structured groups of actions. Actions can include completing a form, accessing a database, invoking a web service, calling a handler, interfacing with another application, sending email, queuing work items for groups of people, and more.

active: A process is either active or inactive. A process becomes active when an administrator publishes it. An administrator can deactivate a process to stop people from using it. The CIC administrator or an IPA process designer can reactivate a process.

F

form: The user interface displayed when you pick up a work item. It can also include the work item category, description, and due date of the assigned work.

P

process: A process is a defined, ordered series of actions necessary to complete a task. For example, a process could include all the actions necessary to submit, verify, and approve a purchase order.

process definition: A process designer creates a process definition. A process is a group of states, running like an assembly line. States define the pipeline through which work flows. A series of tasks and actions comprise each state.

process instance: When you or another agent start a process, this action creates a process instance from the selected process definition. An instance is a running process. Multiple instances of the same process can run at the same time.

S

start a process: Depending on the process design, there are different ways to start (launch) a process. For example, IPA Work Item Client users, CIC client users, CIC handlers, or your customers could start a process.

T

task: A task is a sequence of actions performed by the CIC server, IPA Work Item Client users, or CIC client users to achieve a specified result.

W

work item: A work item is a form. IPA Work Item Client or CIC client users enter information in the form. When the corresponding process starts, work items appear in the My Work Items view.

work item state: A state is the current condition of a work item. Possible work item states are: New, ACD-Wait Agent, In Progress, Held, and Completed.

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