



**PureConnect®**

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



# IPA Work Item Viewer

## Printed Help

### 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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## 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

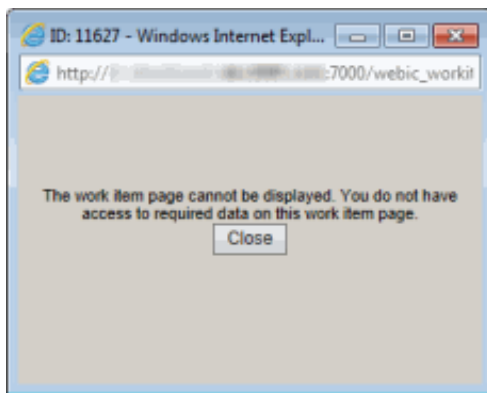
IPA security specifications control access to secured data in work items. For example, your Customer Interaction Center (CIC) administrator can limit the ability to view or edit social security numbers or credit card numbers to agents who are members of the appropriate IPA security specification.

*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.



## Change log

Date	Changes
10-June-2014	First release of this help system.
11-June-2014	Put a work item on hold. Added to Work Item Tips topic.
17-August-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.