



IdentityIQ Work Items

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Work Items

A work item is an action item or unit of work that is assigned to a person to complete. Work items can be automatically generated by a business process, alert, or rule, or they can be manually generated. Work items can, for example, request input from the assigned user, such as access request approval or completion of a form, or they can instruct a user to complete an action, such as manually provisioning access on disconnected systems.

To manage work items, refer to the following:

- [Configuring Work Item Behavior](#)
- [Archiving Work Items](#)

Viewing Your Assigned Work Items

When a work item is created and you have a Notifications card on your home page, the Notifications card displays the number of work items assigned to you. To access the work items, select the card or go to the navigation bar and select **My Work > Work Items**, which brings you to the Work Items page.

Work Items Page

The Work Items page provides a central location where you can view and manage work items assigned to you or to a workgroup of which you are a member. The following options can help you locate work items:

- **Sort By** customizes the sort order of the work item list.
- **Ascending/Descending** icon reverses the list, such as from newest to oldest when sorted by the date created or Z to A when sorted by owner.
- **Filter** can limit the number of work items displayed.
 - Use criteria such as Requester or Assignee and select **Apply** to save the filter options.
 - When filtering is applied, the Filter button turns green to alert you that you are seeing a filtered subset of your items.
 - To clear filtering, select **Filter** again, then select **Clear**.
- **Search** lets you search work items by ID or description. This is a “starts with” type of search.

- **View Archive** displays a list of completed work items. See [Viewing Completed Work Items in the Work Item Archive](#).

The Work Items page displays the following information for each entry:

Column Name	Description
Priority	Specifies the priority level to which the work item was designated. A work item's priority can only be changed when priority editing has been enabled. See Configuring Work Item Behavior .
Type	Type of work item, such as Access Review or Policy Violation.
Description	Description of the work item.
Created	Date the work item was assigned.
ID	Identification number assigned to the work item.
Owner	Name of the identity who has purview over the work item.
Requestor	Name of the user who assigned this work item to you.

Select the information icon to see the Details dialog containing work item and identity details, as well as any forwarding history associated to the work item.

Select the forward icon to open the Forward Work Item dialog, which includes fields for selecting a forward recipient and entering comments. You can only forward work items to an assignee who is a member of your same workgroup.

Select the View icon to the right of an individual work item to open its detailed view. Use the **Add Comment** button or icon to add comments to a work item.

Configuring Work Item Behavior

[Enable Priority Editing for Work Items](#)

[Forwarding Work Items for Inactive Users](#)

[Orphaned Work Items](#)

[Types of Work Items](#)

Enable Priority Editing for Work Items

To edit priorities in IdentityIQ, the **Allow priority editing on work items** option must be selected at **gear > Global Settings > IdentityIQ Configuration > Work Items** tab. For information about configuring global default values for your work item policy, see **Work Items**

When priority editing is enabled, users may use a dropdown list to edit a work item's priority level on the Work Items page, or in the Inbox of the identity to whom the work item is assigned, or in the outbox of the person that assigned the work item.

Forwarding Work Items for Inactive Users

If a work item is created for a user who is no longer active in IdentityIQ, it is forwarded to the manager or supervisor for that user. If no manager is listed, the work item is assigned to the IdentityIQ administrator.

Orphaned Work Items

Orphaned work items are discovered and identified during the Perform Maintenance task. Use escalation rules to determine the proper escalation path for orphaned work items. Escalation rules are created and set during the configuration and implementation of the product.

Types of Work Items

Your IdentityIQ instance may be configured to include the following types of work items in the Work Items table:

- Access Review
- Approval
- Challenge
- Delegation

- Form
- Impact Analysis
- Manual Action
- Policy Violation
- Remediation
- Request Violation
- Signoff

Archiving Work Items

By default, work items only exist in IdentityIQ until they are completed. You may want to store archived versions of the work items after completion, for historical or auditing purposes. To do this, you must enable work item archiving, which is configured in the IdentityIQ global settings. Navigate to **gear > Global Settings > IdentityIQ Configuration > Work Items** and select the work item types you want to archive. For more information, see .

Viewing Completed Work Items in the Work Item Archive

Use the Work Item Archive page to view completed work items. Access this page by navigating to **My Work > Work Items** and selecting the **View Archive** button.

Note: Only work item types that have been selected as types that can be archived in the IdentityIQ configuration can be viewed on the Work Item Archive page. To access the system settings for Work Items, navigate to **gear > Global Settings > IdentityIQ Configuration > Work Items**. For more information, see **Work Items**.

Find specific work items by entering an item name or ID in the search field. Or you can use the Advanced Search button to filter which work items your table displays, specifying data such as priority, date, type, individuals, or ID.

To customize the information displayed in the Work Item Archive table, mouse over one of the header rows, select the dropdown arrow to reveal the sub-menu and select the columns you want to display from the Columns menu.

Select a line item to launch the View Work Item page.

The View Work Item page contains the following information.

Column Name	Description
ID	Identification number assigned to the work item.
Name	Name of the work item.
Type	Type of work item.
Requestor	Name of the user who assigned this work item to you.
Workgroup	Displays the workgroup to which this work item is assigned if applicable.
Owner	Name of the identity who has purview over the work item.
Completed By	Date the work item was completed
Created	Date the work item was assigned.
Modified	Date changes, if any, were made to the work item.
Archived	Date the work item was archived.

Column Name	Description
Priority	Specifies the priority level to which the work item was designated.
Access Request ID	Identification number designated for the Lifecycle Manager access request.

Reporting on Archived Work Items

IdentityIQ provides a standard Work Items Archive Report. For more information, see **Work Item Archive Report** .

Completing Work Items

Once the action that the work item is tracking has been completed, the work item can be marked as complete.

- For information about completing work items generated by reports, see **How to Complete Report Work Items**.
- For information about completing work items that require sign off on task results, see **How to Complete Task Work Items**.
- For information about completing work items that confirm revocation is completed, see **How to Complete Revocation Work Items**.
- For information about addressing policy violation work items, see **Policy Violation Work Items**.
- For information about addressing access review work items, see **How to Complete Access Review Work Items**.

Auditing Work Items

You can include work items in the General Actions that you can track for auditing purposes. See **Audit Configuration**.

If you include any work item actions in the auditing configuration, then you can search on this information in an advanced search. See **Audit Search**.

Reporting on Work Items

The **Work Item Archive Report** reports on active and completed work items. For more information, see the *IdentityIQ Reports* guide.