The following provides step-by-step instructions for performing the most commonly used functions in DTA myWorkspace.

Function		**Steps**
1	Logon to the Computer	1. Enter your Login ID 2. Enter your Password 3. Press OK
2	Access the test MWS site	1. Open Internet Explorer by clicking the icon on your desktop 2. Type in the following web address: https://vgapps-qa.hhs.state.ma.us/edm/
3	Login to MWS	1. Enter login ID: tr_WelID 2. Enter Password: welcome
4	Search for new tasks	1. Click the "Search Tasks" tab 2. Select Status of "New" from the dropdown menu 3. Select a location under the Office dropdown menu 4. Click "Search Tasks" 5. Review search results layout
5	Access/Review a task	1.From the myWorkflows screen, click on the Folder ID of any task ***Note:** If you do not have any Active tasks assigned then go to step 8, Self-Assign, to assign yourself tasks. 2.Review the Task Summary information 3.Click "Work Task" at the bottom of the screen 4.At least one new tab will appear in the upper left side of the screen, beside the Task Summary tab. These other tabs contain links to the scanned documents. 5.Click on the tab(s) next to Task Summary to view the document(s)
6	View two windows simultaneously, using the snap functionality.	1. Open another window of Internet Explorer (CRL +N) 2. Minimize DTA MWS 3. Click and drag the DTA MWS window all the way to the right of the screen until it snaps to fill half the page. 4. Click and drag the other window all the way to the left of the screen until it snaps to fill the other half the page. 5. Minimize the extra browser window. 6. Maximize the MWS window.
7	Assign a task	1. From the myWorkflows page, click on the Folder ID of one of your tasks.

Function		Steps
		2. From the Task Summary page, use the "Select User by Office" dropdown menu, and choose an office name. 3. Select "Deliver to User" drop down and choose a user name 4. Add notes, optional 5. Click the "Deliver To" button
8	Self-Assign a task	1. From the "Search Tasks" screen, select status of "New", then click "Search Tasks" button 2. Click on a Folder ID for the task that you would like to self-assign, you will be taken to the Task Summary page 3. Click the "Self-Assign Task" button 4. Notice the task status has changed to assigned. The task is now reflected in myWorkflows

The previously described functions cover the most basic process flow from the Clerk perspective. The following are exceptions and alternatives to the standard process.

Function		Steps
9	Update task information	1. From the myWorkflows screen, click the Folder ID for one of your tasks 2. From the task summary page, click on the Work Task button. 3. Clik the Edit Task Information button 4. Edit the "Office" field. 5. Click the "Update Task Information" button. 6. Click the "Change To New" button to ensure that the TAO receiving the task is able to find it when searching.
10	Edit indexing elements on a document	1. Go back to the myWorkflows screen. 2. Click on the Folder ID for one of your tasks ***Note:** If you do not have any Active tasks assigned then go to step 8, Self-Assign, to assign yourself tasks. 3. From the Task Summary page, scroll to the bottom of the window, click the "Work Task" button 4. Click on the documents tab, next to the Task Summary tab. 5. Click the "Edit Index" button 6. Edit one or more of the data elements 7. Click the "Update Inbox" button 8. Notice the index data elements have changed at the top of the document screen and on the task summary page
11	Using the myWorkFlows	1. You will be taken to the "myWorkFlows" tab

Function		Steps
		2. Review the page layout
12	Dispose of a task with a single document	1. From the task summary page, click the "Disposition" drop-down, at bottom of page, and select a disposition. *Note: Most of the time this will be "processed". 2. Click "Complete Task."
13	Dispose a task with more than one document	1. From the myWorkflows page, select the folder ID of a task with more than one document 2. Click Work Task button. The Task Summary page will refresh and the task status will update to "In Progress". *Note: if the task is in the "new" status or it is not yet assigned to you, then go to step 12, Self-Assign, to assign yourself tasks. 3. Click on the document tab, beside the task summary tab to view the scanned document 4. At the bottom of the page, click the "Processed" checkbox 5. Click Save 6. Repeat steps 3 – 5 for each remaining scanned document 7. Click the Task Summary tab. *Note: For each document you saved as processed, there should be a ✓ symbol next to the "Document Processed?" lines. 8. In the Disposition dropdown, choose "Processed" 9. Click the "Complete Task" button

DEFINITIONS:

Statuses	What State is this Document in?
Assigned	This task has been assigned to a staff member. This means it has not yet been processed, but is available to be worked.
Hold	This task is on hold by a staff member. A task reaches Hold status by being processed by a staff member and leaving the task before disposing of the task.
In Process	This task is currently being worked by a staff member.
New	This task has just arrived in the system from the EDMC. It is not yet assigned to a staff member. It is in the TAO's new queue for a clerk to assign out.

Processed	This task has been processed and disposed of by a staff member.

Disposition	What Action has been Taken on a Document?
Duplicate – No Action Taken	This document is a duplicate and has already been processed.
Forwarded to Another Agency	This document was designated for another agency and has been delivered to that agency.
Processed	This document was processed and completed successfully by the staff member.
Returned to Client	This document was returned to the client; this is typical of documents that require a signature that may be missing.
Unreadable Image	This category is for documents that cannot be processed due to legibility (not caused by poor scanning).
Unidentified	This category is for documents that are completely unidentifiable.