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<br>2. Enter your Password<br>3. Press OK |
| 2 | Access the test MWS site | 1. Open Internet Explorer by clicking the icon on your desktop<br>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<br>2. Enter Password: welcome |
| 4 | Using the myWorkFlows | 1. You will be taken to the "myWorkFlows" tab<br>2. Review the page layout |
| 5 | Access/Review a task | 1. From the myWorkflows screen, click on the Folder ID of any task<br>*Note: If you do not have any Active tasks assigned then go to step 12, Self-Assign, to assign yourself tasks.<br>2. Review the Task Summary information<br>3. Click "Work Task" at the bottom of the screen<br>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.<br>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)<br>2. Minimize DTA MWS<br>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.<br>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.<br>5. Minimize the extra browser window.<br>6. Maximize the MWS window. |
| 7 | 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. |

| Function | | Steps |
|---|---|---|
| | | *Note: Most of the time this will be "processed".<br>2. Click "Complete Task." |

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

| Function | | Steps |
|---|---|---|
| 8 | Dispose of a task with more than one document | 1. From the myWorkflows page, select the folder ID of a task with more than one document<br>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.<br>3. Click on the document tab, beside the task summary tab to view the scanned document<br>4. At the bottom of the page, click the "Processed" checkbox<br>5. Click Save<br>6. Repeat steps 3 – 5 for each remaining scanned document<br>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.<br>8. In the Disposition dropdown, choose "Processed"<br>9. Click the "Complete Task" button |
| | Search for new tasks | 1. Click the "Search Tasks" tab<br>2. Select Status of "New" from the dropdown menu<br>3. Select a location under the Office dropdown menu<br>4. Click "Search Tasks"<br>5. Review search results layout |
| 9 | Assign a task | 1. From the myWorkflows page, click on the Folder ID of one of your tasks.<br>2. From the Task Summary page, use the "Select User by Office" dropdown menu, and choose an office name.<br>3. Select "Deliver to User" drop down and choose a user name<br>4. Add notes, optional<br>5. Click the "Deliver To" button |
| 10 | Update task information | 1. From the myWorkflows screen, click the Folder ID for one of your tasks<br>2. Click the Work Task button |

| Function | | Steps |
|---|---|---|
| | | 3. From the task summary page, click on the Edit Task Information button<br>4. Edit the "Office" field.<br>5. Click the "Update Task Information" button.<br>6. Click the "Change To New" button to ensure that the TAO receiving the task is able to find it when searching. |
| 11 | Edit indexing elements on a document | 1. Go back to the myWorkflows screen.<br>2. Click on the Folder ID for one of your tasks<br>*Note: If you do not have any Active tasks assigned then go to step 12, Self-Assign, to assign yourself tasks.<br>3. From the Task Summary page, scroll to the bottom of the window, click the "Work Task" button<br>4. Click on the documents tab, next to the Task Summary tab.<br>5. Click the "Edit Index" button<br>6. Edit one or more of the data elements<br>7. Click the "Update Inbox" button<br>8. Notice the index data elements have changed at the top of the document screen and on the task summary page |
| 12 | Self-Assign | 1. From the "Search Tasks" screen, select status of "New", then click "Search Tasks" button<br>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<br>3. Click the "Self-Assign Task" button<br>4. Notice the task status has changed to assigned<br>5. The task is now reflected in myWorkflows |

**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. |

**DEFINITIONS (continued):**

| 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. |