MC&FP Tasking, Assignments and Reporting

Group Administrator Guide

Current as of July 2019



Providing policy, tools and resources to further enhance the quality of life of service members and their families

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Tasking, Assignments and Reporting System Overview

The Military Community and Family Policy Tasking, Assignments and Reporting system provides a robust environment, allowing the user to execute the following functions:

- Manage personnel and deadlines
- Document/ audit effort expended toward a TAR request
- Generate interactive reports as required
- Assign liaison contact information
- Assign TAR tasking responsibility to specific staff
- Set up notification lists
- Define dependencies
- Define and attach teams for access across contracts
- Use meta-tags for easier TAR recall and searching

The guidelines included here take you step-by-step through the process of creating a TAR, assigning the TAR, creating TAR assignments, completing daily TAR updates and generating reports.

Throughout this guide, content or technical assistance requests will be referred to as either:

- Base TAR — original request for assistance
- TAR assignment — sub-tasks within the original request

Four types of personnel use the TAR:

- Office of Military Community Outreach personnel
- Approved MC&FP government personnel
- Technical staff
- Approved contracting team members – Contractors can view only the TARs that the government has assigned them. Contractors cannot view TARs assigned to other contractors. If multiple contracts are to collaborate on a project, the government can update the TAR or assignment to be a team event and add the various contractors.

Accessing the TAR system

The TAR system can be accessed using your Department of Defense CAC Card or external certificate authority certificates. You must register and be approved for access via the Single Sign On system. If you do not have an account registered with your certificate, you need to submit a request following the steps outlined in the "How to Request Account Access for Restricted Web Applications" document. Any problems during the registration process can be addressed by submitting a Customer Support ticket for technical support.

You can access the TAR system two ways:

- Via the MC&FP Office of Communication Portal**:** **https://apps.militaryonesource.mil**; the **TAR** is listed under **Staff Services.**
- Via direct URL: **https://apps.militaryonesource.mil/TAR**

Access within the TAR system varies based on your access permissions.

Navigating the TAR

Home Page

Once you enter the TAR, you will see four to six navigation buttons on the left side of the page, depending on your role within the TAR. Each button allows you to access different functions. Below you will find information on each button:

- **My Dashboard button** – All users have access to this button. Users can use this button to filter the TARs assigned to them, their assigned program office, the TAR point of contact/liaison, notification list, team member or by contract. Users can also customize their dashboard, so each time they go into this button they will find a list of TARs that match their saved criteria.
- **Search button** – All users have access to this button. Users can use this button to search for TAR assignments by tags, a TAR number or keywords. Only government users can include any company or any contract in the search criteria, whereas a contract user can only include their contract.
- **Create TAR button** – Only Military Community Outreach government staff have access to this button. Contractors can request a Base TAR be created via email to their MCO point of contact.
- **Reports button** – All users have access to this button. Users can run various types of reports in this button. The default report is a deadline report. Other available reports include CCB Review; Directorate, Program and Projects; Public Affairs Oversight; Staff and Staff Roll-up.
- **File Repository button** – All users have access to this button. Users can view and search the latest file attachments. Contractors can only view files included in TARs associated to their contract(s).
- **Administration button** – Only MCO, staff or technical team staff that have been granted administrator role access have access to this button. This button allows users to make administrative changes to this application.

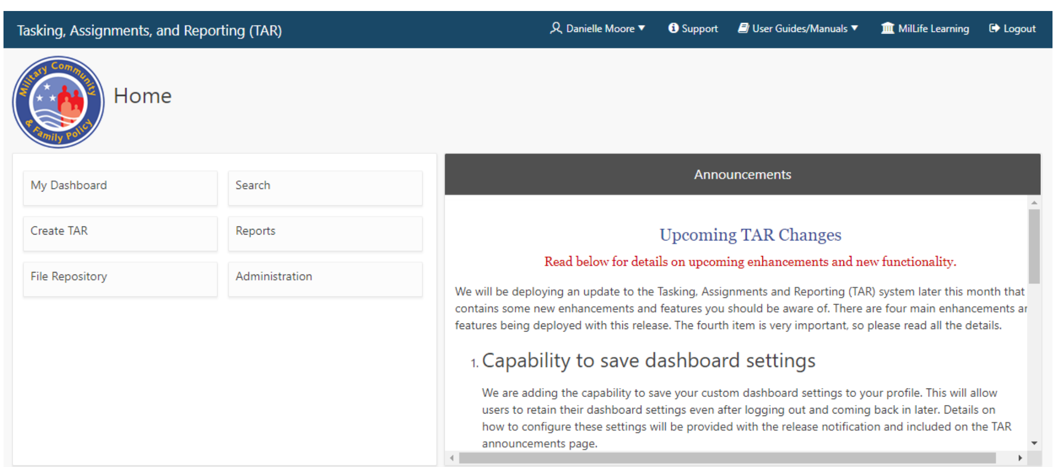


Figure 1 Government User with Administrator Access View

Menu

The TAR menu is the blue bar that appears on the top of every page. In the upper right corner, five links are listed. Each link allows you to access different functions. Below you will find information on each link:

- **User link** – Select My Profile to display your SSO profile in a separate window. Selecting My Information will display your role(s) for the TAR application.

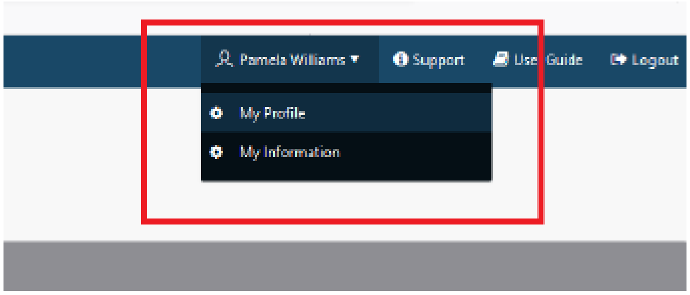


Figure 2 Ability to View SSO Profile and User Role(s)

- **Support link** – Select the Support link to display the Application Messaging System support form for the TAR application.

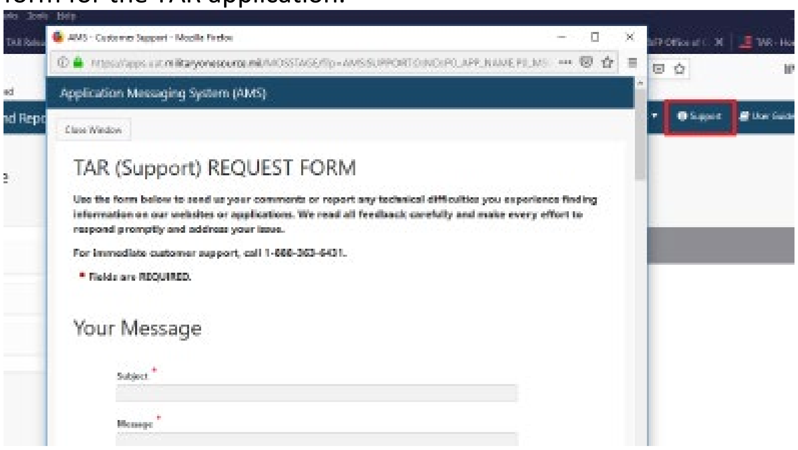


Figure 3 TAR Support Request Form

- **User Guides/Manuals link** – Select the User Guide link to display a PDF version of this guide or the Quick Reference Guide.
- **MilLife Learning link** – Select the MilLife Learning link to launch MilLife Learning, part of Military OneSource's network of programs and resources, in a new window.
- **Logout link** – Select the Logout link to end your current TAR session.

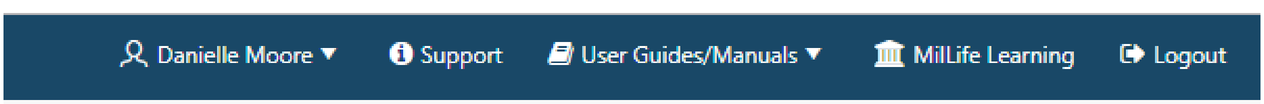


Figure 4 All User View of TAR Menu

Navigation

Navigation can be found on all pages of the TAR application, which allows you to be directed anywhere in the application without returning to the home page. You will see six to seven navigation links on the right side of the page, depending on your role within the TAR. The links work similarly on the home page buttons.

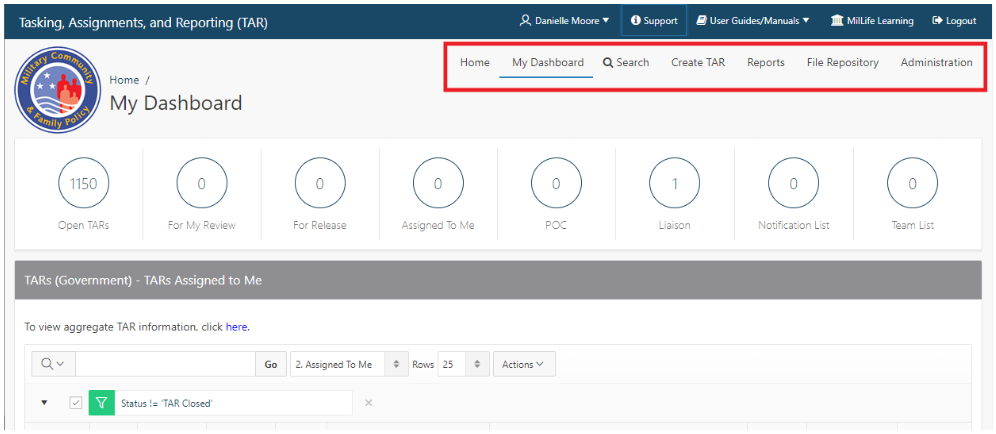


Figure 5 Government TAR Navigation

Note: Administration will only display for users who have administrator access.

My Dashboard

When you navigate to My Dashboard, the interactive report default will display the TARs that are assigned to you. The summary circles displayed across the top contain the total number of TARs for that group. Clicking one of them will update the interactive report below based on the summary circle selected.

- **Open TARs circle** – Open TARs shows the number of open TARs to which you have access by contract and/ or by team. Government users are not bound by contract and can see all TARs regardless of contract.
- **For My Review circle** – For My Review shows the number of TARs that have been assigned to you for review.
- **For Release circle** – For Release shows the number of TARs that have been assigned to you that have been marked for release.
- **Assigned To Me circle** – Assigned To Me shows the number of TARs that have been assigned to you.

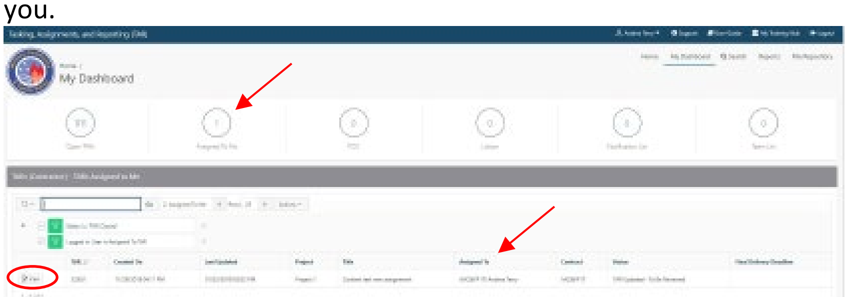


Figure 6 View of How Many TARs are Assigned to User

- **POC circle** – POC shows the number of TARs to which you are assigned as the point of contact. **POCs are not notified on TAR posts unless they are added to the notification list.**
- **Liaison circle** – Liaison shows the number of TARs to which you are assigned as the Liaison. Liaisons are notified on all associated TAR posts.
- **Notification List circle** – Notification List shows the number of TARs in which you are included in the Notification List.
- **Team List circle** – Team List shows the number of TARs that you have access to by way of a Team in which you are included being assigned to a TAR.

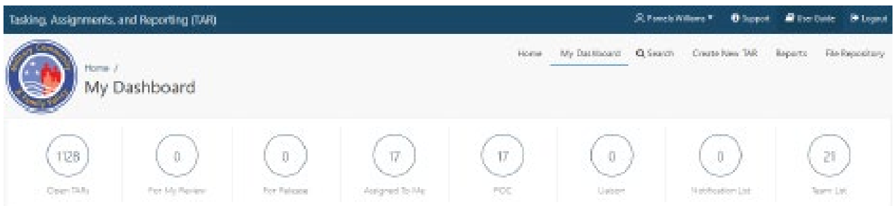


Figure 7 Government View of My Dashboard Group Circles

Note: "For My Review" and "For Release" summary circles will only be displayed for government users.

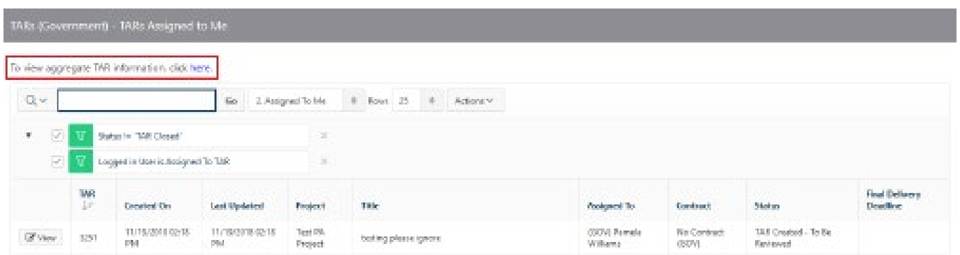


Figure 8 Government User View of My Dashboard Interactive Report

Note: "To view aggregate TAR information, click here" will only be displayed for government users.

Layout of a TAR

There are seven main areas in a TAR:

1. **View TAR** – This screen summarizes all basic information about the TAR. In this area, you also can update any background information about the TAR, mark the TAR if public affairs oversight is required, and close or reopen the TAR.
2. **Attachments** – Users can expand this section to view all attachments loaded to the TAR.
3. **Dependencies** – Users can expand this section to view all dependencies linked to this TAR.
4. **Tasks** – Users can expand this section to view all tasks set up within the TAR.
5. **Open Assignments** – Users can view all open assignments within the TAR.
6. **Completed Assignments** – Users can expand this section to view all closed assignments within the TAR.
7. **Base TAR Details** – Users can view all details added to the Base TAR, and also can view all details loaded into the assignments in chronological order.

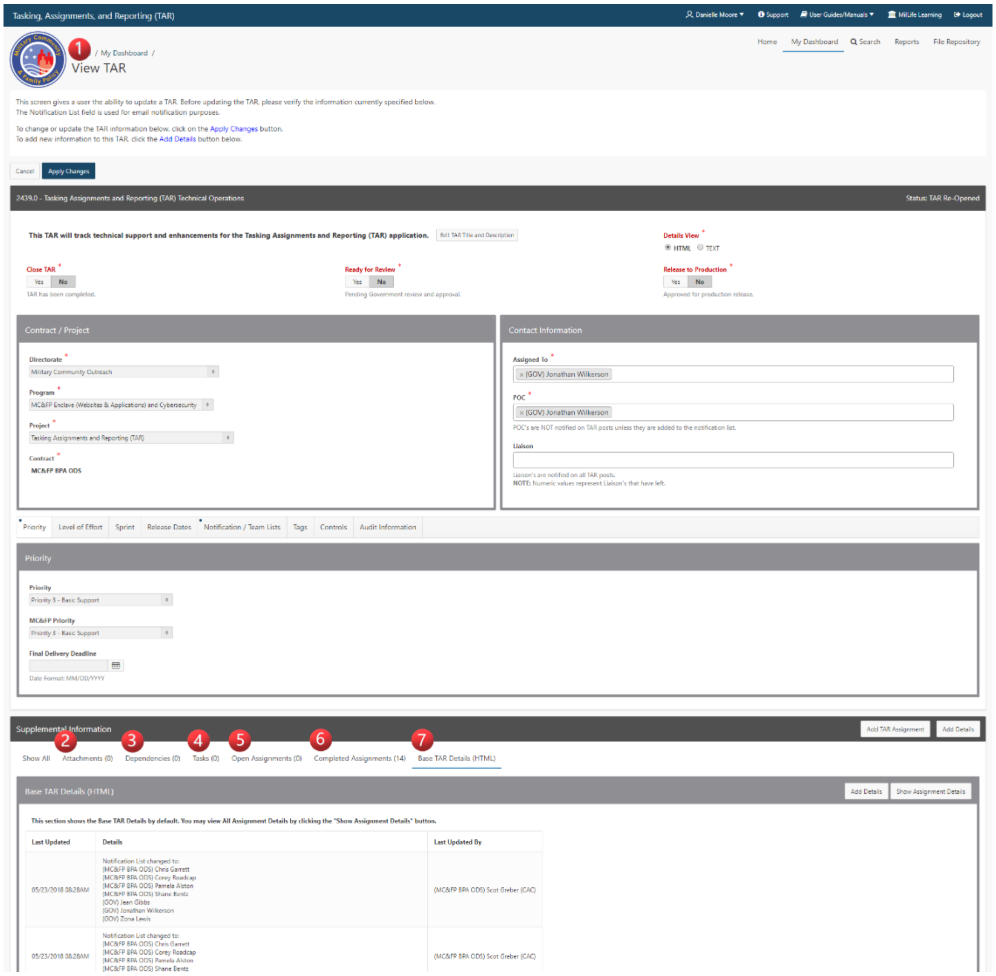


Figure 9 View TAR Layout

Searching for a TAR

The search feature, which can be performed from any page, is provided to allow you to filter the interactive report even further for specific TARs you would like to view. Base TARs can be identified as whole numbers, while TAR assignments are decimal numbers.

Example of TAR numbers:
Base TAR: 2911
TAR Assignment: 2911.15

Government and contract users can search by a TAR number, keywords or tags. Additionally, government users can include any company or any contract in the search criteria. Contract users can only include their contract in the search.

If performing a search from the homepage or TAR navigation, you will be directed to the My Dashboard page after submitting the search criteria and the interactive report will be displayed with your search results.

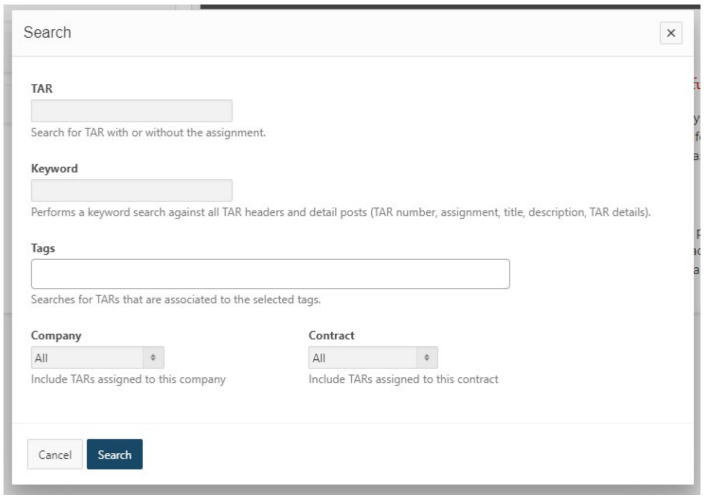


Figure 10 Government User Search Window

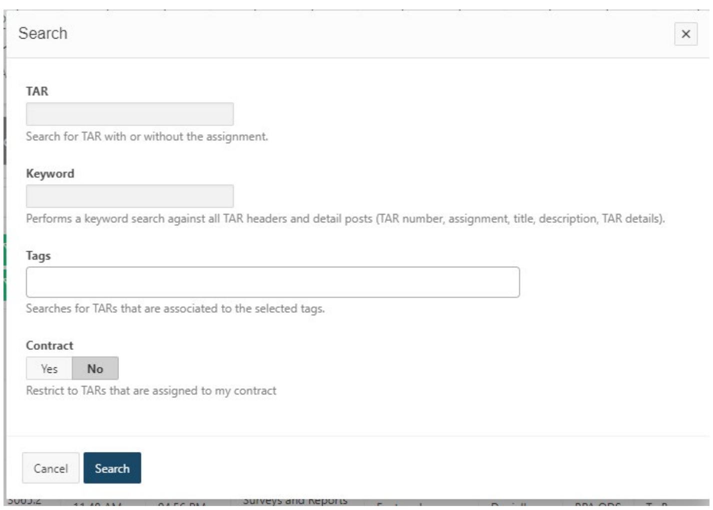


Figure 11 Contract User Search Window

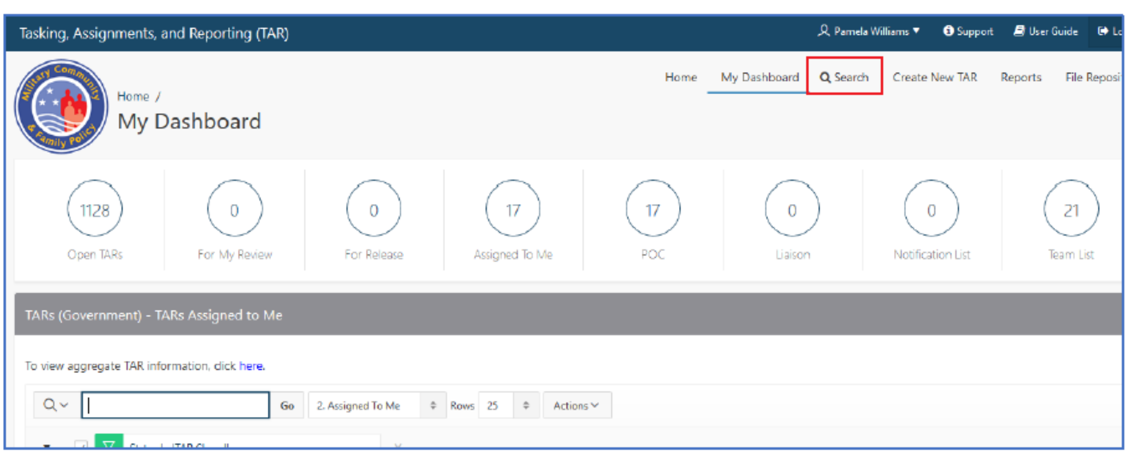


Figure 12 Search Link in the Menu

Creating a Base TAR

A Base TAR can be created only by government staff. Contractors can ask their MCO point of contact via email to create a Base TAR.

The following requests should be created in the TAR system:

- Routine technical issues with websites and applications
- Content requirements within the scope of work
- Administrative requirements within the scope of work

Follow these steps to create a Base TAR:

1. Select the **Create TAR** button.
2. **Fill in the required background information** on the TAR and ensure all required fields are completed. Required fields are noted with a red asterisk.
   Note that you can select multiple Assigned TO, POC and Liaison users.
   Also, if the project is not listed in the drop-down box, you may need to create one by selecting Add Project from the dropdown.
3. The POC is usually government staff, whereas the Liaison field is reserved for the vendor.
4. Complete the **Title and Description** boxes with the specific details of the assignment.
   Note that the **Title** appears in the email notification; ensure the **title** is descriptive enough that users receiving the notifications understand the full assignment task with the **title**.
5. Enter **associated deadlines, tags** or **attachments** in the applicable fields when necessary.
   Note that multiple tags can be added, or a new tag can be created. You can also upload multiple files.
6. If **public affairs review or approval** is required, ensure the **Public Affairs Oversight Required** is marked Yes.
7. Select the **Create TAR** button.

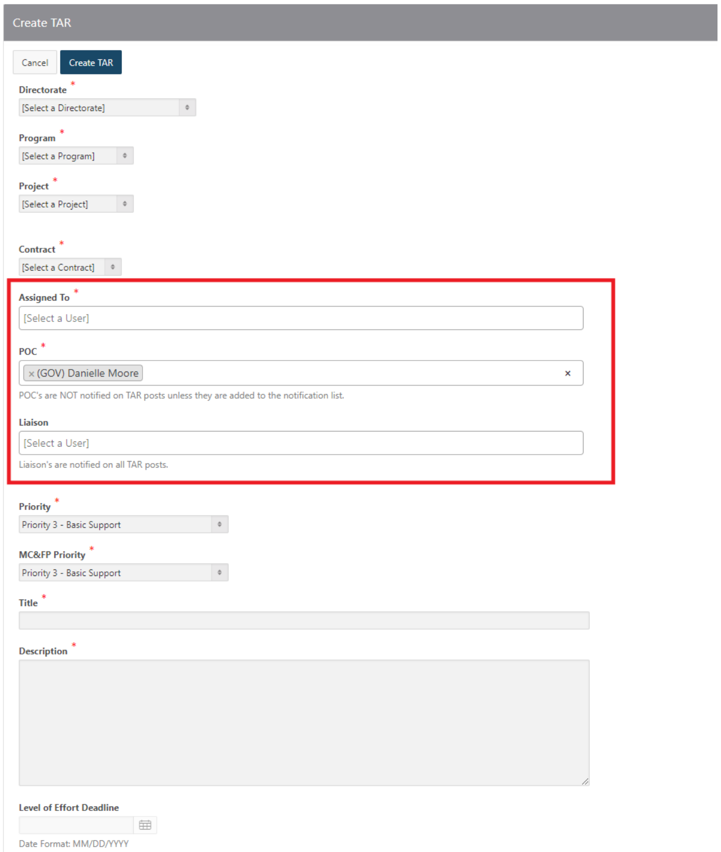


Figure 13 Create New TAR Assigned To, POC and Liaison Fields

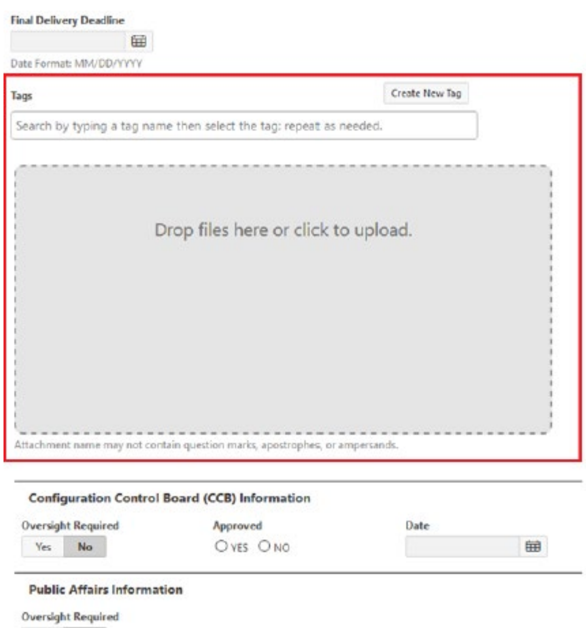


Figure 14 Create TAR Tags and Attachment Fields

Editing a Base TAR

After creating a new TAR, you are directed to the View TAR page. You can also view an existing TAR from the My Dashboard page.

Click on the Edit button to update the TAR title and description. The required fields are listed in the Contract / Project and Contract Information sections. Like the Create TAR page, multiple user selections are accepted in the Assigned To, POC and Liaison fields.

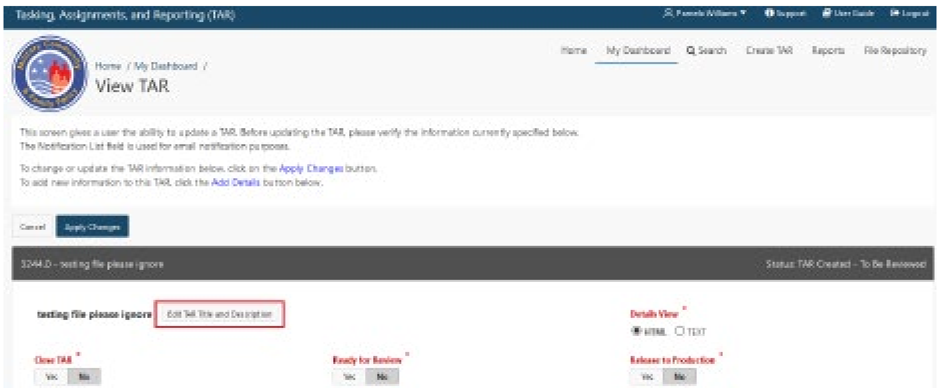


Figure 15 View TAR Edit Button

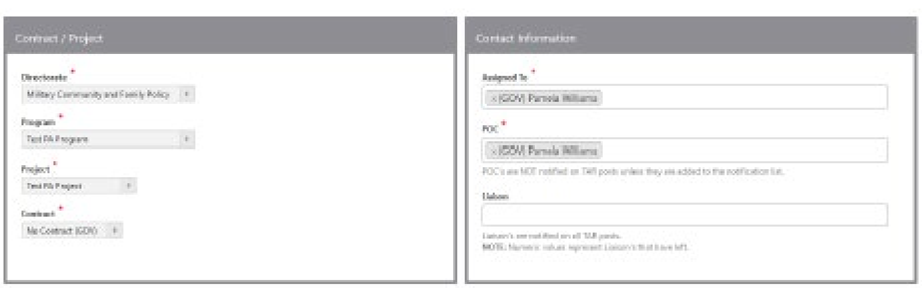


Figure 16 View TAR Contract Fields

Creating TAR Assignments

All users can create TAR assignments within Base TARs. Follow these steps to create a TAR assignment:

1. Search for the Base TAR within which you need to create a TAR assignment.
2. Once you find the Base TAR, click on the **View** icon.

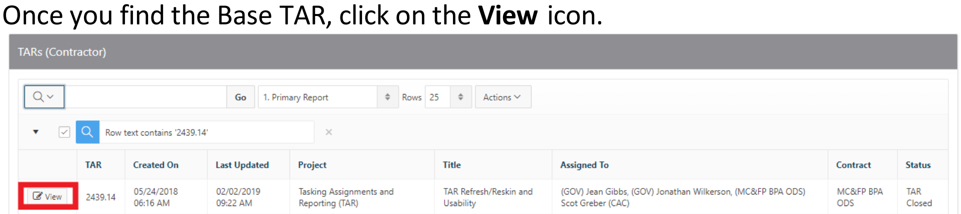


Figure 17 View Icon in Search Results

3. Scroll down to the **Supplemental Information section** and select **Add TAR Assignment**.

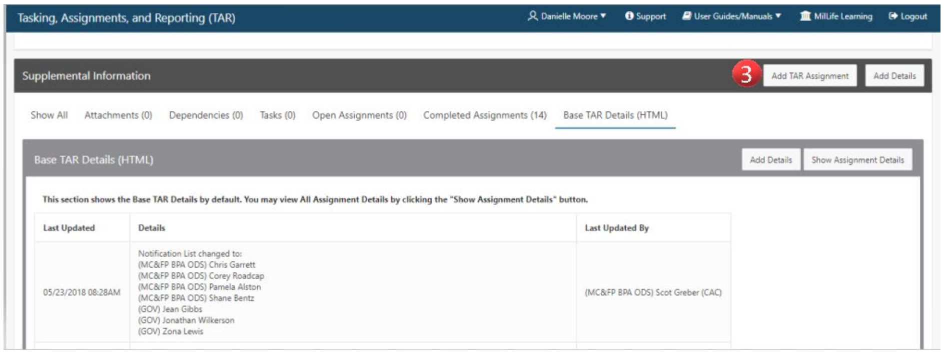


Figure 18 Supplemental Information Add TAR Assignment

4. The **Create Assignment** page will open. The **TAR#, Directorate, Program, Project and Contract** will already be filled in. Click in the **Assigned To** field and select the staff member to whom you want to assign the assignment. If the POC and Liaison information needs updating, click in the fields, type in the staff member's name and select the appropriate staff to update it.

   Note that you may assign multiple staff members to the **Assigned To**, **POC**, and **Liaison** fields.
5. Complete the **Title and Description** box with the specific details of the assignment. Note that the **Title** appears in the email notification; ensure the **title** is descriptive enough that users receiving the notifications understand the full assignment task with the **title**.
6. Enter a **Deadline** and add **Attachments**, if applicable.
7. Then select **Create Assignment**. This will generate an email notification to everyone on the notification list, as well as the assignment assignee.

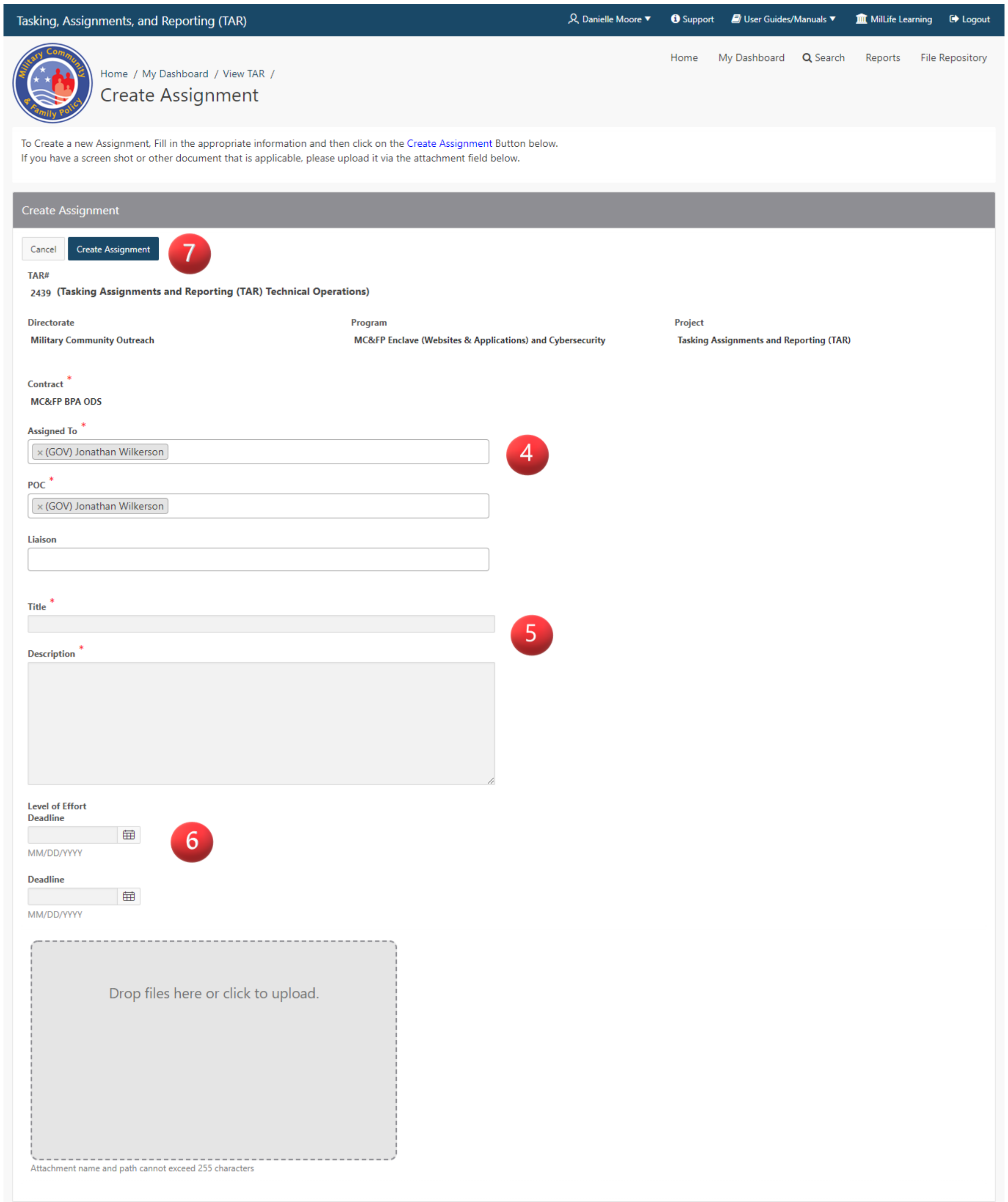


Figure 19 Create TAR Assignment Details

Updating Base TARs

1. From the **My Dashboard** page or **Search** window, search for the Base TAR number you need to update. Search results will show a list that includes the Base TAR (the whole number) and all assignments (the whole number appended with a period and additional numbers). Click on the **View** icon for the Base TAR to open it. From this page, you can update main TAR details as well as access individual assignments.

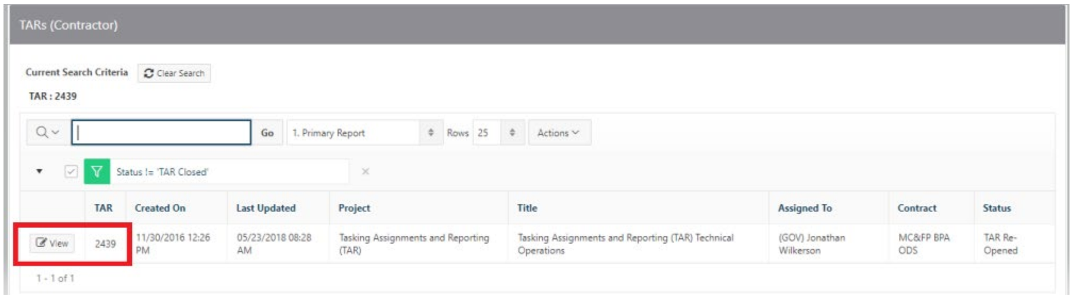


Figure 20 Base TAR Search Results to View and Edit Details

2. Scroll down to the Supplemental Information section and click on **Base TAR Details.** Then click on the **Add Details** button.

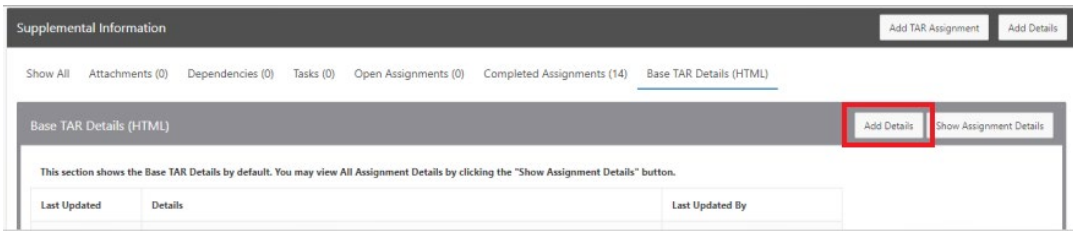


Figure 21 Base TAR Details

3. The **Add Details** page will open. You will update the following:
   a. **Assigned To** – Select the TAR user to whom you are addressing the post.
   b. **Details** – Enter the details of the task.
   c. **Attachments** – Upload any applicable attachments referenced in the **Details** section.
   d. **Ready for Review** or **Release to Production** – Change the switch from No to Yes if the details are ready for review or approved to be released for production.
   Note the switches populate the number of TARs in the respective government [dashboard](#) circles.
   e. **Review** all information and select **Add Details** to add the details to the system.

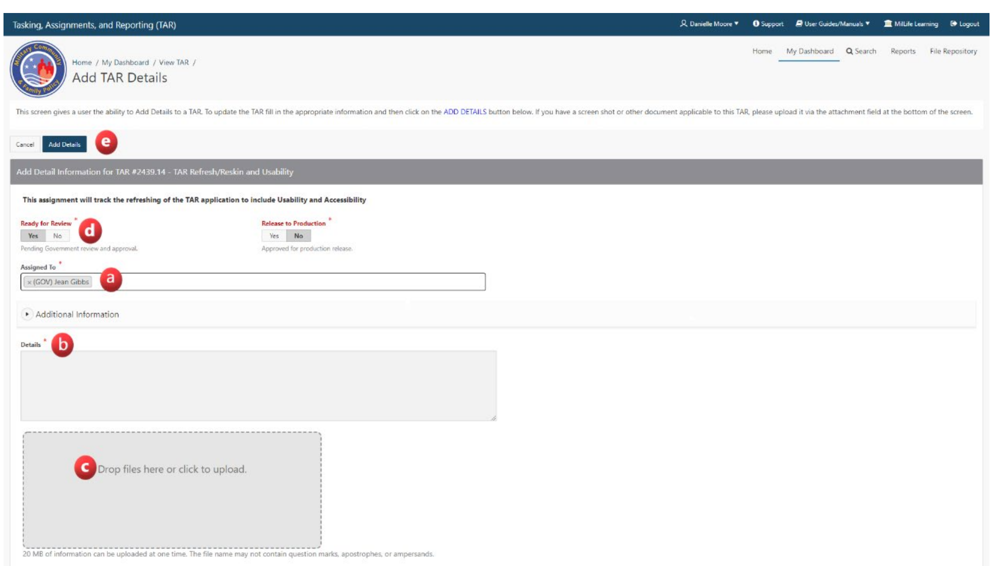


Figure 22 Add TAR Details Screen

Updating a TAR Assignment

1. From the **My Dashboard** page or **Search** window, search for the TAR assignment number you need to update and click on the **View** icon next to the TAR assignment. You can also select the Base TAR and scroll down to the **Open Assignments** section to select the assignment you wish to update.

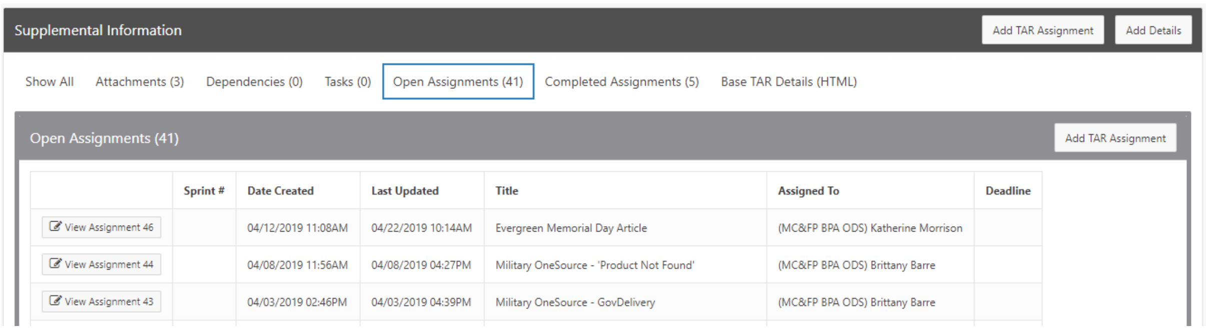


Figure 23 Open Assignments View in Base TAR

2. This will open the **View TAR page**. The top portion contains the background information about the TAR, public affairs oversight requirements and the TAR status. Scroll to the **Supplemental Information** section at the bottom of the page and click on **Add Details**.
3. The **Add Details page** will open. You will update the following:
   a. **Assigned To** – Select the TAR user to whom you are addressing the post.
   b. **Details** – Enter the details of the task.
   c. **Attachments** – Upload any applicable attachments referenced in the Details section.
   d. **Ready for Review** or **Release to Production** – Change the switch from No to Yes if the details are ready for review or approved to be released for production.
   e. Review all information and select **Add Details** to add the details to the system.

Closing a Base TAR or TAR Assignment

Once all the tasks have been completed in a Base TAR or a TAR assignment, you should close the Base TAR or assignment. When you close a Base TAR or assignment, the content within those TARs/assignments is not lost. It can be viewed at any time and reopened if additional work is needed. The same steps are used to close either a Base TAR or assignment.

NOTE: If you close a Base TAR and there are open assignments, those assignments will stay in open status unless you close each assignment individually.

1. From the **My Dashboard** page or **Search** window, locate the Base TAR/assignment that is ready to be closed. Click on the **View** icon.
2. In the header area of the **TAR**, change the Close TAR switch from No to Yes.
3. Select **Apply Changes**. This moves the TAR to a closed status.

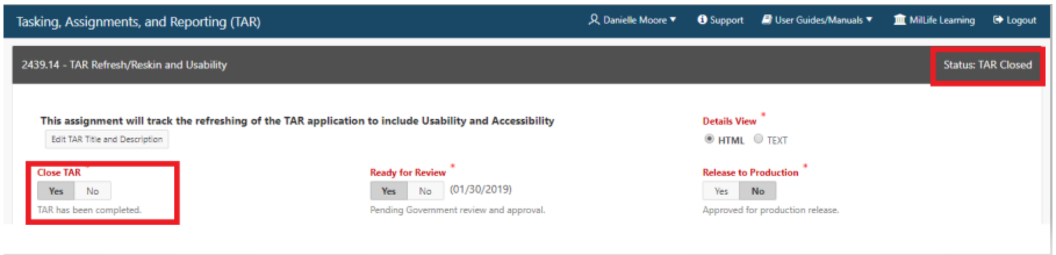


Figure 24 Close TAR Switch and Status

Tags

All TARs can be tagged by TAR users, allowing for easier filtering. This feature can be found under the Tags tab on the View TAR page. Once tags are selected for a TAR, all users will be able to view and search TARs by the tags associated to the TAR.

Search by Tags

1. Open the **Search** window from any page.
2. Click the **Tags** field and select a tag from the drop-down menu.
3. Select **multiple tags** by clicking additional tags from the drop-down menu.
4. Click **Search** button.
5. Review results.

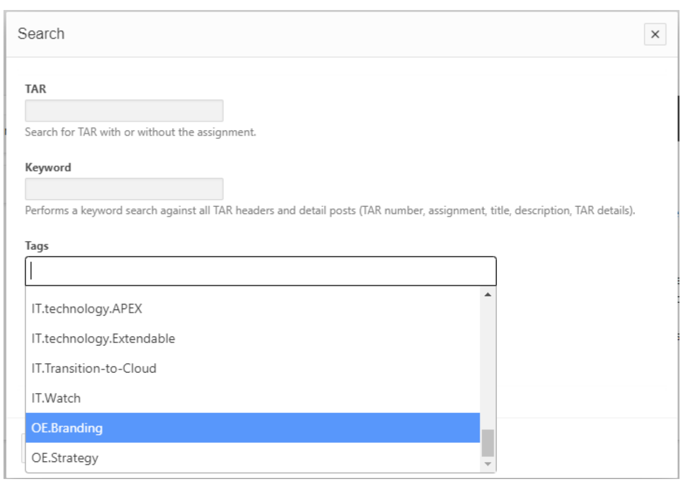


Figure 25 Search by Tags

Figure 26 Search by Multiple Tags

Creating a Tag

1. Select the **Create New Tag** button on the View TAR page within the Tags tab on the View TAR page.
2. Enter the tag **Name** and **Description**.
   Note that when you create a tag, you need to preface the tag with the program/office to which you are assigned. Personal tags can be created and should be prefaced with your initials.
3. Click the **Add New Tag** button.

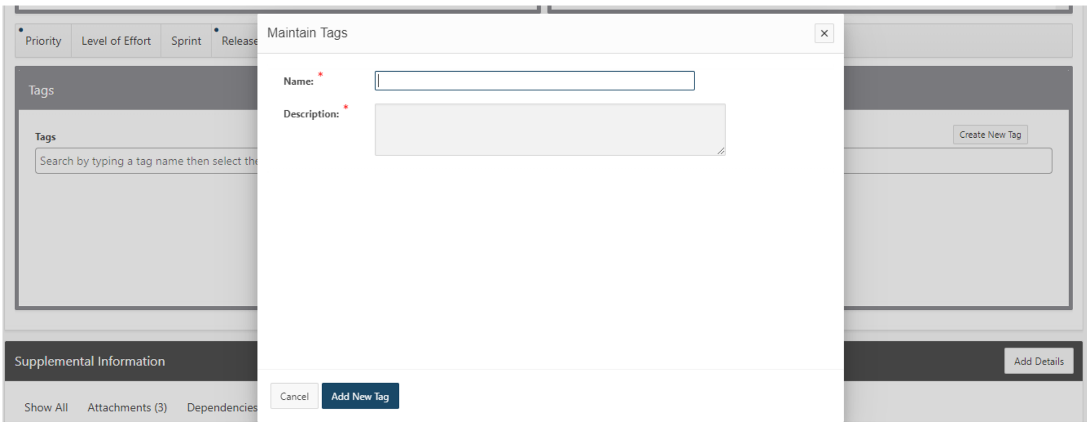


Figure 27 Create New Tag

Examples of Tags:

- IT.Attention
- IT.CMS-ShowStopper
- IT.CSS.Chris-Watch

Dependencies

Dependencies allow government users to establish the order in which a project is completed by associating multiple TARs and assignments to complete a larger project. Government users are able to set up a workflow, ensuring each step in the process is completed and approved before moving on to the next task. The workflow might include a combination of various Base TARs, assignments or tasks. Dependencies are available from the **View TAR** page.

1. **Start Dependencies** – shows which TARs and assignments must be completed and closed before the current TAR or assignment is started. To add a start dependency, select the start dependency button.
2. **Closed Dependencies** – shows which TARs and assignments must be completed or closed before the current TAR or assignment may be closed. To add a closed dependency, select the closed dependency button.
3. **Dependent TARs** – shows which TARs and assignments have a dependency set and the dependency type.

Figure 28 Government Dependencies View

Note: "Add Start Dependencies" and "Add Close Dependencies" buttons will only be displayed for Government users.

If a user tries to post in a TAR or assignment that has an uncompleted start dependency attached to it, users will still be able to post, but the following notification will pop up and the user will have to acknowledge it before posting.

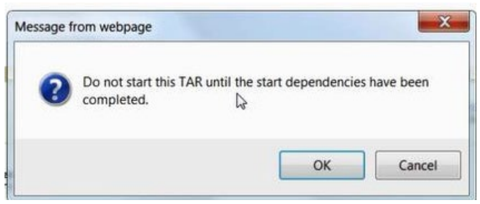


Figure 29 TAR Dependency Pop Up Window

To add Start or Close Dependencies:

1. Select the **Add Start Dependencies** or **Add Close Dependencies** button under the Dependencies tab of the View TAR page.
2. Select the box from the populated list of TAR(s) available as a dependency.

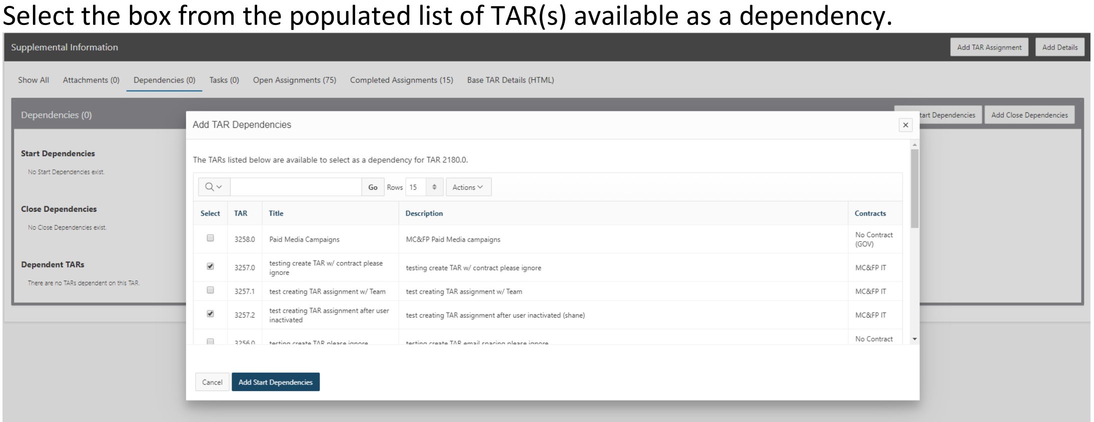


Figure 30 Add TAR Dependencies Selection

3. Select the **Add Start Dependencies** or **Add Close Dependencies** button under the list of TARs.

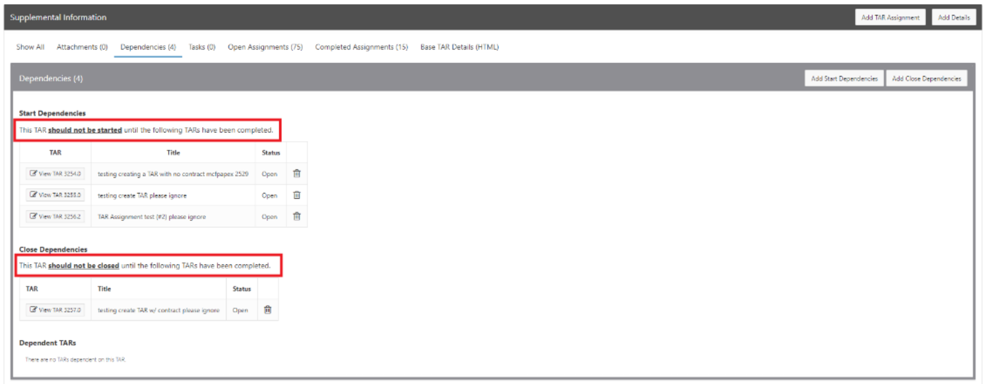


Figure 31 Selected Dependencies Appear in Parent TAR Dependencies Tab

Figure 32 Parent TAR Appears in All Selected Dependencies' Dependencies Tab

Tasks

Tasks are found on the View TAR page and allow users to create and assign tasks within a TAR assignment. There are both required and optional fields when setting up a Task. Completion of the optional fields is especially helpful on assignments where users are requesting action or review by a certain date. Note that all tasks created to support an assignment must be completed before the assignment can be closed.

To add a Task:

1. Select the **Add Tasks** button under the Tasks tab of the View TAR page.
2. Fill in the following fields:
    a. **Title** (required)
    b. **Description** (optional)
    c. **Assigned To** (required)
    d. **Deadline** (optional)
    e. **Complete** (optional)

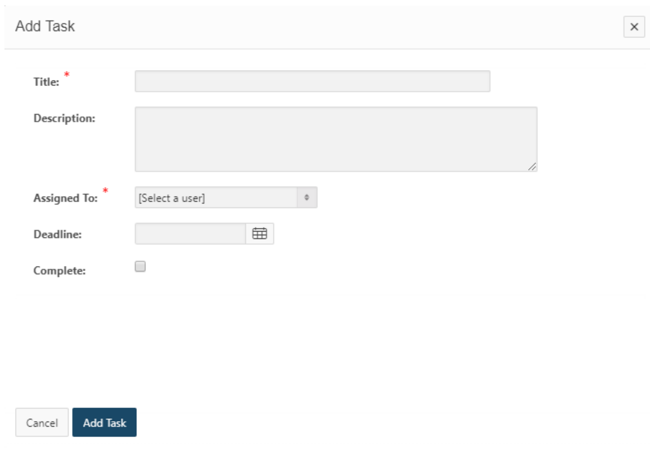
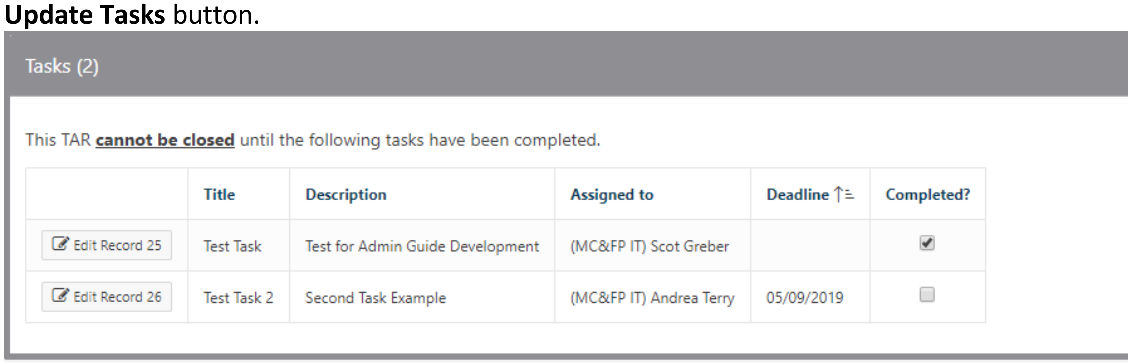


Figure 33 Add Task Pop Up Window

3. Select the **Add Task** button.
4. When a Task is completed, select the appropriate box in the Completed column and then the **Update Tasks** button.


Tasks (2)

This TAR **cannot be closed** until the following tasks have been completed.

	Title	Description	Assigned to	Deadline	Completed?
Edit Record 25	Test Task	Test for Admin Guide Development	(MC&FP IT) Scot Greber		☑
Edit Record 26	Test Task 2	Second Task Example	(MC&FP IT) Andrea Terry	05/09/2019	☐

Figure 34 Task List Including Completed and Uncompleted Task

Locating a Closed TAR/Reopening a TAR

When locating a closed Base TAR or assignment, search just as you would for an open TAR from the **My Dashboard** page or **Search** window. Once the results appear, follow these steps:

1. Uncheck the **Status != 'TAR Closed'** filter.

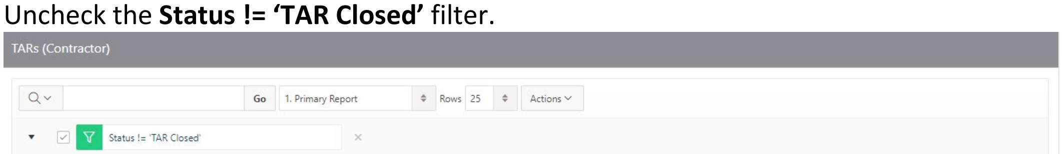


Figure 35 TAR Closed Search Filter

2. To view the details of the closed Base TAR or specific assignment, select the **View**.
3. To reopen the Base TAR or assignment, in the **View TAR** page, click the **No** button under the Close TAR field.
4. Select **Apply Changes,** and the Base TAR or assignment will then be moved to an open status.

TAR Notifications

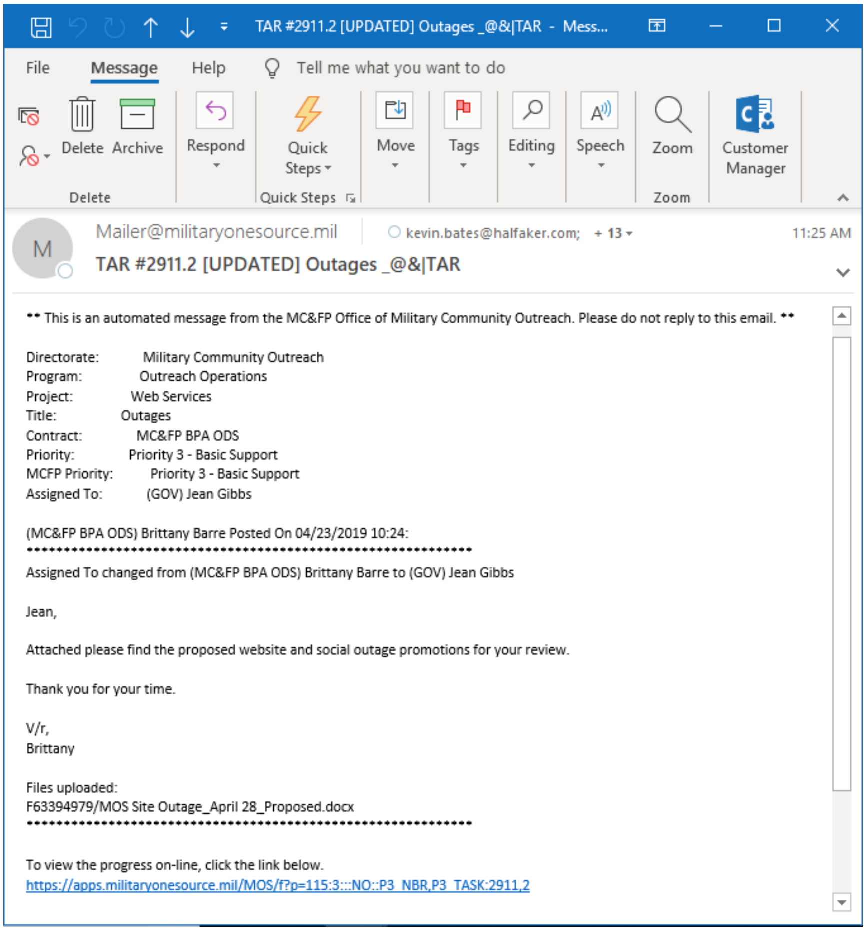
When deciding which TAR notifications to receive, there are several options available. Please review the options below to determine which is best for you:

- **Base TAR notification list** – By placing your name on the Base TAR notification list, you will receive an email notification when any user updates the Base TAR or any assignment within that TAR that is added and updated after you have been placed on the notification list.
  Note: If assignments associated with the Base TAR were created before you were added to the Base TAR notification list, you will not receive those assignment notifications unless you add yourself to each assignment notification list.
- **Assignment notification list** – By placing your name on the assignment notification list, you will receive an email notification only when a user updates that particular TAR assignment.
- **Assigned To notification** – By leaving your name off all TAR notification lists, you will not receive any email notifications unless you happen to be included in the "Assigned To" field. When there is an action in the TAR requiring your attention, the user initiating the action can update the **Assigned To** option with your name. This will generate an email notification alerting you of the requirement. The **Assigned To** can be set back to the original user(s) once the required action is completed.

TAR Notification Email

If you receive a TAR notification email, the notification will list the following:

1. **In the subject line**:
   - TAR number and assignment
   - Status of recent post (Opened, Updated, Support Requested, Support Completed, Closed, Release Approved)
   - Title
   - Deadline (if one is designated)
2. **Directorate**
3. **Program Office**
4. **Project**
5. **Title**
6. **Contract**
7. **Priority**
8. **MCFP Priority**
9. **Assigned To**
10. **Who updated it last**, details of their post and file name of any included attachments
11. **Direct link** to TAR post


TAR #2911.2 [UPDATED] Outages _@&|TAR - Mess...

Mailer@militaryonesource.mil

kevin.bates@halfaker.com; + 13

11:25 AM

TAR #2911.2 [UPDATED] Outages _@&|TAR

** This is an automated message from the MC&FP Office of Military Community Outreach. Please do not reply to this email. **

Directorate: Military Community Outreach
Program: Outreach Operations
Project: Web Services
Title: Outages
Contract: MC&FP BPA ODS
Priority: Priority 3 - Basic Support
MCFP Priority: Priority 3 - Basic Support
Assigned To: (GOV) Jean Gibbs

(MC&FP BPA ODS) Brittany Barre Posted On 04/23/2019 10:24:
****
Assigned To changed from (MC&FP BPA ODS) Brittany Barre to (GOV) Jean Gibbs

Jean,

Attached please find the proposed website and social outage promotions for your review.

Thank you for your time.

V/r,
Brittany

Files uploaded:
F63394979/MOS Site Outage_April 28_Proposed.docx
****

To view the progress on-line, click the link below.
https://apps.militaryonesource.mil/MOS/f?p=115:3:::NO::P3_NBR,P3_TASK:2911,2

Figure 36 TAR Notification Email