

CAS2Net and CCAS Open Forum

Thursday
6 June 2024
1:00 PM Eastern Time

Topic:

Creating Sub-Organization Levels and Assigning Sub-Panel Managers, and User Role Assignments

[TEAMS Meeting Link](#)

[Meeting ID: 231 024 528 524](#)

[Passcode: SMZdLr](#)

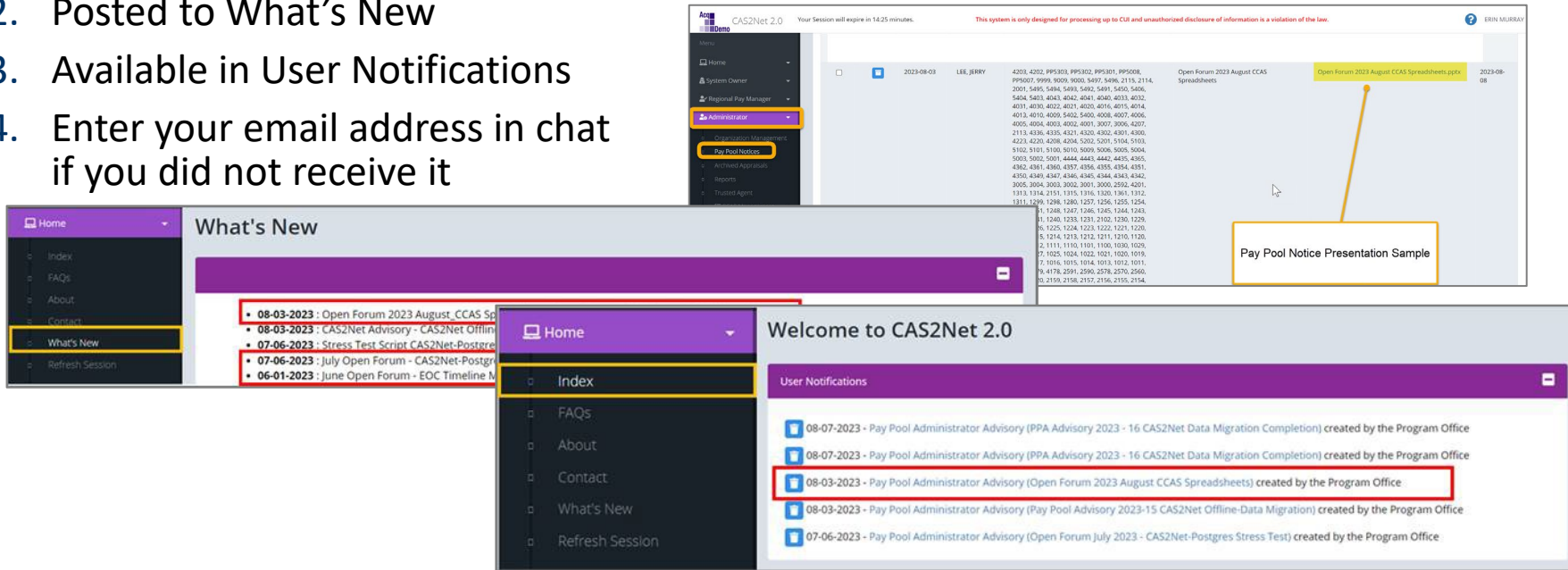
[Meeting Call in Information](#)

[+1 571-403-9146](#)

[Phone Conference ID: 989 870 18#](#)

Housekeeping Items

1. Presentations are sent in advance through the CAS2Net Pay Pool Notices
2. Posted to What's New
3. Available in User Notifications
4. Enter your email address in chat if you did not receive it



5. Please remember to “Mute” your phone to prevent any background noise and additional feedback.
6. All Open Forum Sessions will be *recorded*
7. Each recorded session will be posted to the AcqDemo website (including presentation slides) at <https://acqdemo.hci.mil/training.html#cas2netOpenForums>

Creating Sub-Organization Levels

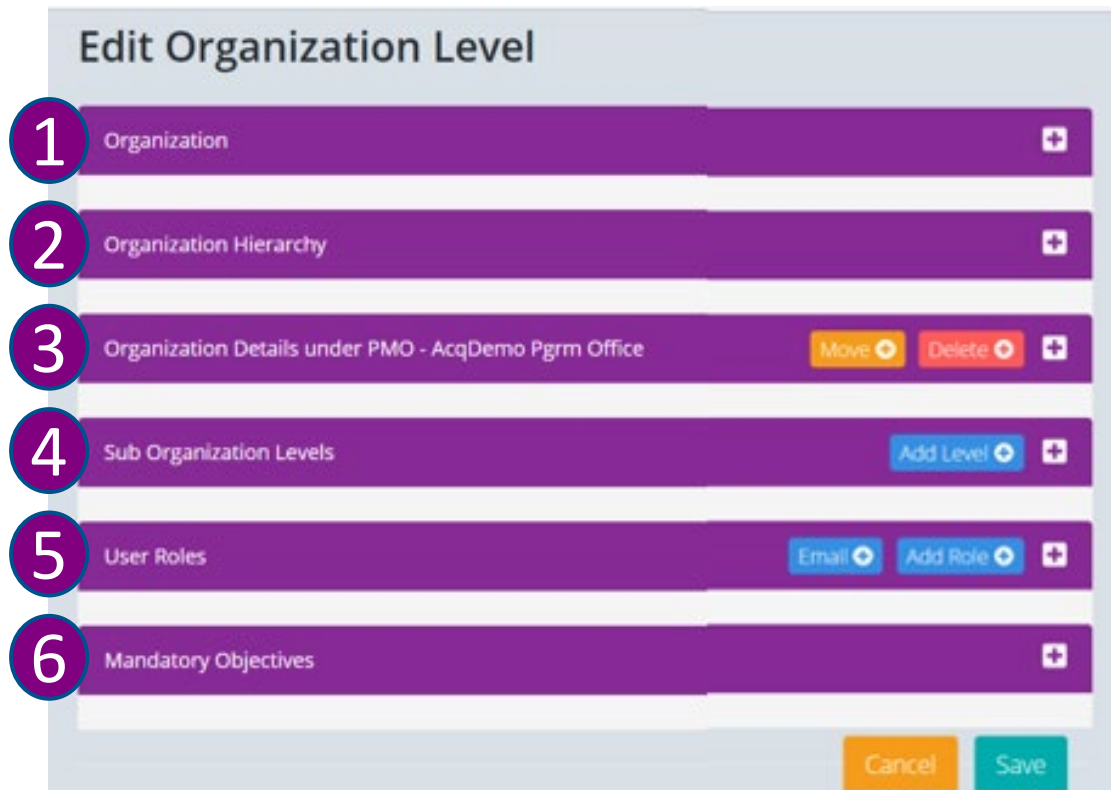
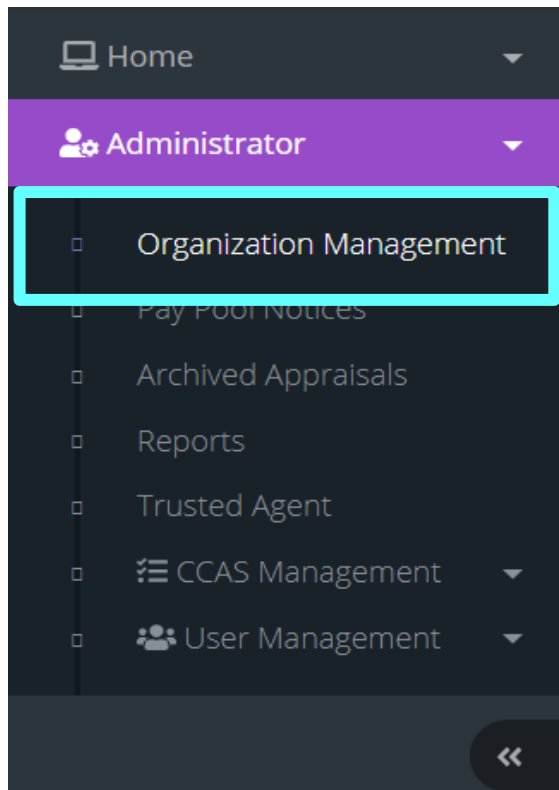
- **Organization Hierarchy**
- **Sub Organization Management**
- **Navigate to Sub Organization Details Page**
- **Add Organization Level**
- **Add Level – Pay Pool**
- **Move Organization Level**
- **Delete Organization Level**
- **Organization Roles - Manager, Secondary Manager, Administrator, Super User**
- **Assign Organization Role**
- **Edit Existing User's Organization Role**
- **Delete Organization Role**

Organization Management - Navigation

ORGANIZATION MANAGEMENT allows administrators to manage their organization structure, business rules, and roles through the Organization Management module.

To view Organization Management page

Menu > Administrator > Organizational Management > Edit Organization Level



Organization Management – What it tells you

Component / Command / Organization / Subordinates

Organization's structure as created in CAS2Net

Details on the organization

Subordinate pay pools and/or sub-panels under current organization

Users with roles to manage organization (Manager, Secondary Manager, Superuser, and Administrator)

Mandatory objectives for current organization level. Visible only if mandatory objectives are enabled in the Organization Details panel Administrator)

The screenshot shows the 'Edit Organization Level' interface with the following components:

- Organization**: A purple bar with a white plus icon on the right.
- Organization Hierarchy**: A purple bar with a white plus icon on the right.
- Organization Details under PMO - AcqDemo Pgrm Office**: A purple bar with 'Move' (yellow button), 'Delete' (red button), and a white plus icon on the right.
- Sub Organization Levels**: A purple bar with 'Add Level' (blue button) and a white plus icon on the right.
- User Roles**: A purple bar with 'Email' (blue button), 'Add Role' (blue button), and a white plus icon on the right.
- Mandatory Objectives**: A purple bar with a white plus icon on the right.

At the bottom right of the interface are two buttons: 'Cancel' (yellow) and 'Save' (teal).

Organization Hierarchy

Edit Organization Level

9000

Organization (sub-panels or multiple pay pools listed in the dropdown ▼)

Organization -

Select Organization

9000 - 9000 Macro Free Pay Pool ▼

Organization Hierarchy +

Organization Details under AcqDemo - AcqDemo-PMO

Show UIC/PAS ⓘ
Refresh Contribution Plans +
Move +
Delete +
-

Sub Organization Levels

Add Level +
-

User Roles

Email +
Add Role +
-

Mandatory Objectives -

Organization

Edit Organization Level

9000

Organization (component, command, multiple pay pools, pay pools, sub-panels) listed in the dropdown ▼)

Organization -

Select Organization

PMO - AcqDemo Pgrm Office ▼

Component

Select Organization

DAF - All Department of the Air Force ▼

Major Command

Select Organization

AFMC - All AFMC (4001 - 4179) ▼

Subordinate Command

Select Organization

AFSC - OO-ALC - OO-ALC (4138-4147) ▼

Pay Pool

Select Organization

4131 - OC-ALC - 76 AMXG ▼

Sub-panel

Select Organization

PP4131-SP4 - 564 AMXS ▼

Organization Hierarchy



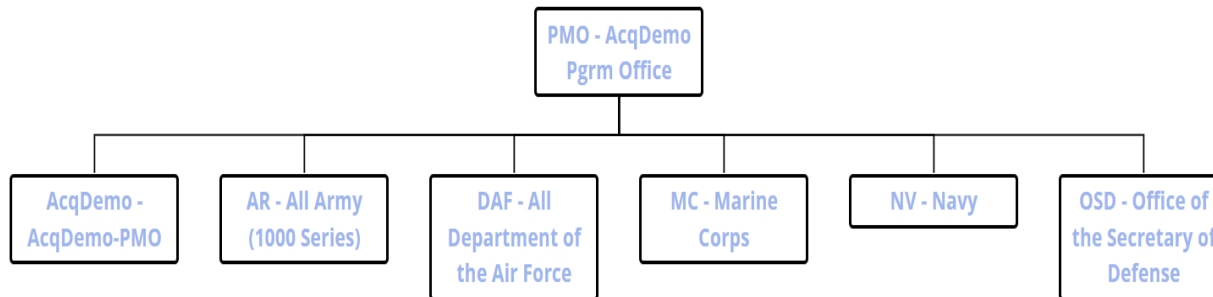
The Organization Hierarchy displays a hierarchy chart of how, as applicable, your component, command, pay pool, and sub-panels are structured in CAS2Net.

Organization Hierarchy

Click Here to Expand and view



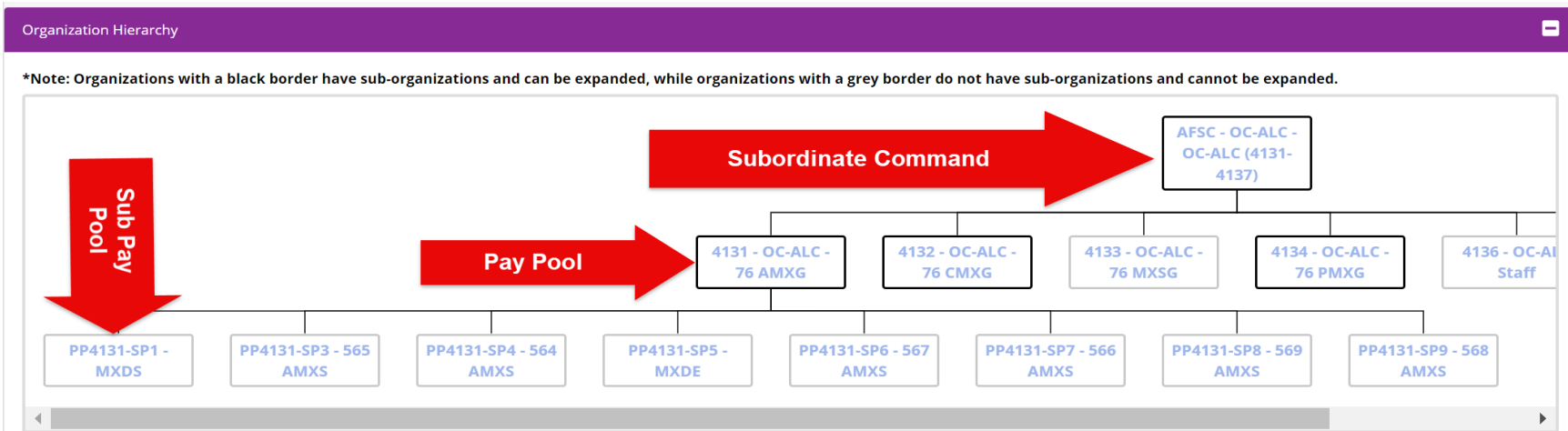
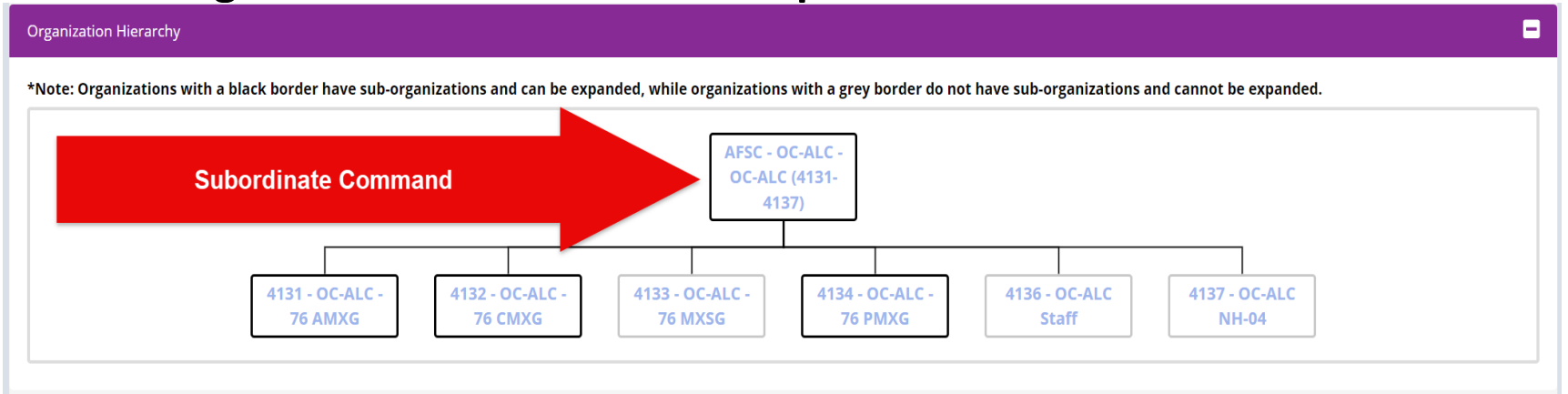
*Note: Organizations with a black border have sub-organizations and can be expanded, while organizations with a grey border do not have sub-organizations and cannot be expanded.



Organization Hierarchy

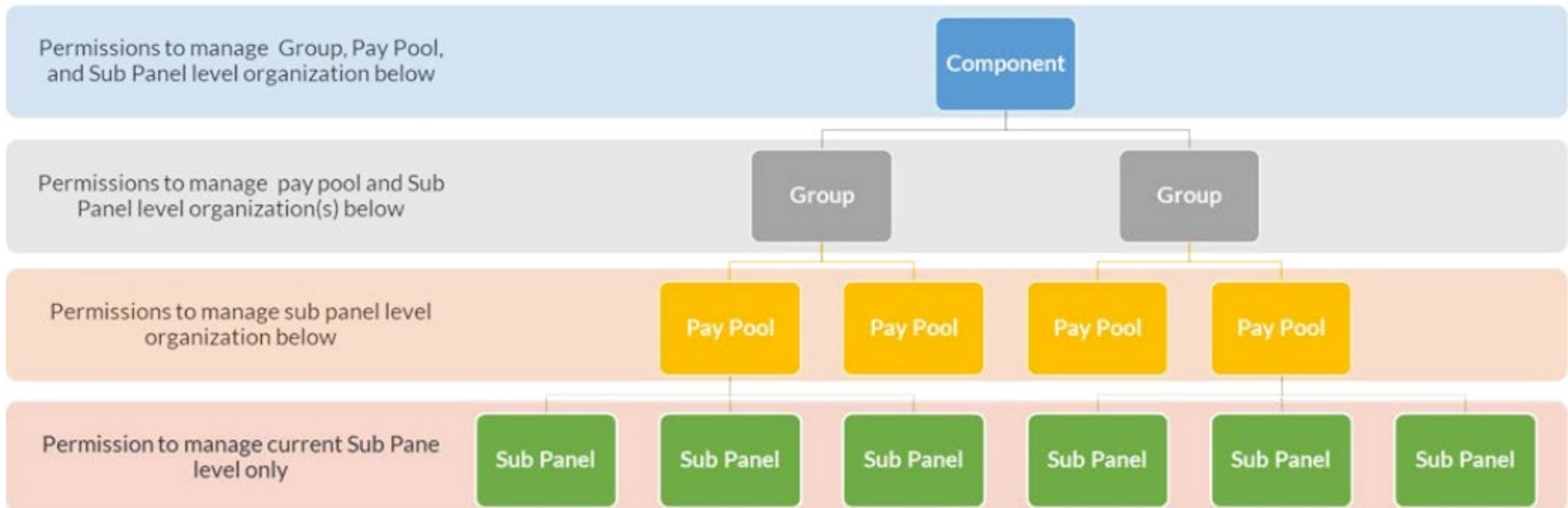


Organizations with a black border have sub-organizations and can be expanded, while organizations with a grey border do not have sub-organizations and cannot be expanded.



Organization Management - Permission

- The Administrator's permission to manage is based on the the organization level of the Administrator



Sub Organization Management

Edit Organization Level

9000

- **Sub Organization Level**

Sub Organization Levels

Add Level 



Search:

| Sub-Panel Id  | Name  | Description  | AcqDemo Employee Count  | Non AcqDemo Employee Count  |
|--|--|---|--|--|
| 4321A | Sub 1 Supervisors | Supervisors | 8 | 0 |
| 4321B | Sub 2 Contracting | Contracting | 35 | 1 |
| 4321C | Sub 3 Program Managers | Program Managers | 25 | 0 |
| 4321D | Sub 4 Front Office Group | Deputy Program Manager, Operations Manager, Lawyer | 1 | 0 |

Showing 1 to 4 of 4 entries

Previous

1

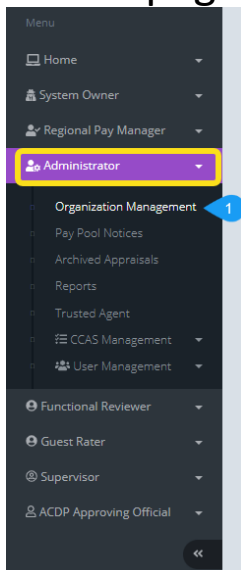
Next



Note: A sub organization is a pay pool or sub panel that branches out below your organization level. If your current organization level has sub organization(s), you have the administrative permissions to navigate to and manage those sub organization levels individually. Sub organization(s) don't have permission to access or edit parent organization details.

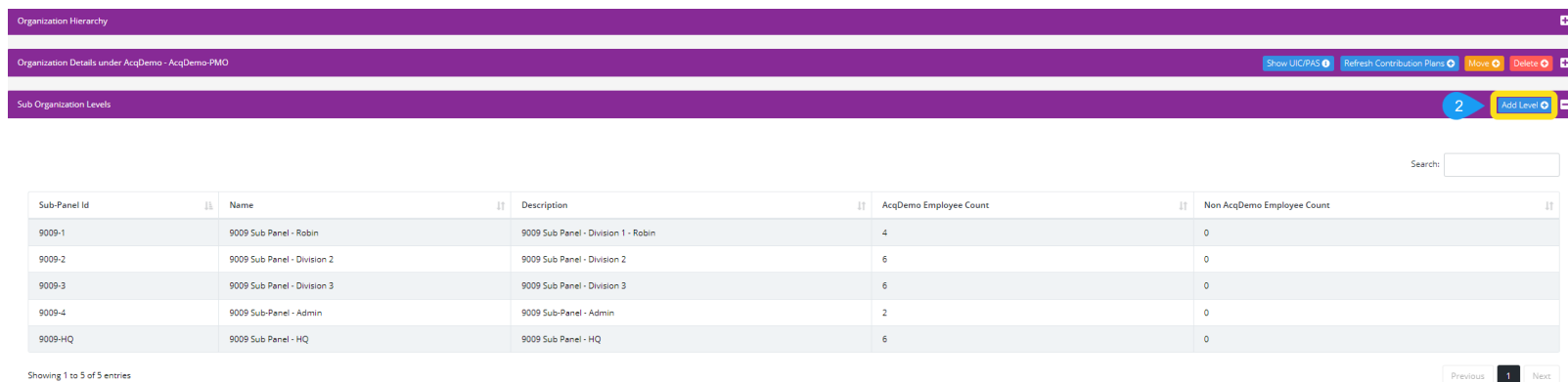
Navigate to Sub Organization Details Page

- To manage and make manage details, user roles, and/or mandatory objectives for a particular sub organization and not your entire pay pool, you will have to navigate to the particular sub panel/pay pool's organization details page first.
- To view sub organization management page, go to:
 - Menu > Administrator > Organization Management
 - From the table in Sub Organization Levels panel, select desired Pay Pool/ Sub Panel.
 - If the pay pool/sub organization you want to view is further down your organization's hierarchy structure, repeat step 2 until you reach the correct details page



Menu

- Home
- System Owner
- Regional Pay Manager
- Administrator**
- Organization Management
- Pay Pool Notices
- Archived Appraisals
- Reports
- Trusted Agent
- CCAS Management
- User Management
- Functional Reviewer
- Guest Rater
- Supervisor
- ACDP Approving Official



Organization Hierarchy

Organization Details under AcqDemo - AcqDemo-PMO

Sub Organization Levels

Search:

| Sub-Panel Id | Name | Description | AcqDemo Employee Count | Non AcqDemo Employee Count |
|--------------|-----------------------------|-------------------------------------|------------------------|----------------------------|
| 9009-1 | 9009 Sub Panel - Robin | 9009 Sub Panel - Division 1 - Robin | 4 | 0 |
| 9009-2 | 9009 Sub Panel - Division 2 | 9009 Sub Panel - Division 2 | 6 | 0 |
| 9009-3 | 9009 Sub Panel - Division 3 | 9009 Sub Panel - Division 3 | 6 | 0 |
| 9009-4 | 9009 Sub-Panel - Admin | 9009 Sub-Panel - Admin | 2 | 0 |
| 9009-HQ | 9009 Sub Panel - HQ | 9009 Sub Panel - HQ | 6 | 0 |

Showing 1 to 5 of 5 entries

Previous 1 Next

Navigate to Sub Organization Details Page

- Determine if you're in the right sub panel/pay pool organization details page by reviewing:
 - Details under Organization Details panel
 - Page navigation bread crumb links

The screenshot shows the 'Edit Organization Level' page. At the top right, a red arrow points to a breadcrumb link '9009 > 9009-3'. Below this, there are three purple header bars: 'Organization', 'Organization Hierarchy', and 'Organization Details under 9009 - 9009 Pay Pool'. The 'Organization Details' section contains a table with the following data:

| Sub-Panel Id | Name | Description |
|--------------|-----------------------------|-----------------------------|
| 9009-3 | 9009 Sub Panel - Division 3 | 9009 Sub Panel - Division 3 |

Add Organization Level

- Add Organization Level
- Depending on the scope of your administrative role, you can add new sub panel and/or pay pool levels within your organization structure
- Add Level – Sub Panel



Administrators at all levels are permitted to add sub panel level(s) as a sub organization

- To add sub panel level, go to:
 - Menu > Administrator > Organization Management
 - To add sub panel level(s) under a sub organization in your pay pool, you have to navigate related sub organization’s details page first. Follow steps highlighted in Navigate to Sub Organization Details Page before you continue to step 2
 - Click Add Level

The screenshot shows the application interface with the following elements:

- Left Navigation Menu:** A dark sidebar menu with 'Administrator' highlighted in yellow. A blue circle with the number '1' is next to 'Organization Management'.
- Organization Hierarchy:** A purple header bar with 'Organization Hierarchy' and a close icon.
- Organization Details:** A purple header bar with 'Organization Details under AcqDemo - AcqDemo-PMO' and buttons for 'Show LICPAS', 'Refresh Contribution Plans', 'Move', and 'Delete'.
- Sub Organization Levels:** A purple header bar with 'Sub Organization Levels' and a yellow 'Add Level' button with a blue circle containing the number '2'.
- Table:** A table with 5 columns: Sub-Panel Id, Name, Description, AcqDemo Employee Count, and Non AcqDemo Employee Count. It contains 5 rows of data.
- Footer:** 'Showing 1 to 5 of 5 entries' and 'Previous 1 Next' navigation controls.

| Sub-Panel Id | Name | Description | AcqDemo Employee Count | Non AcqDemo Employee Count |
|--------------|-----------------------------|-------------------------------------|------------------------|----------------------------|
| 9009-1 | 9009 Sub Panel - Robin | 9009 Sub Panel - Division 1 - Robin | 4 | 0 |
| 9009-2 | 9009 Sub Panel - Division 2 | 9009 Sub Panel - Division 2 | 6 | 0 |
| 9009-3 | 9009 Sub Panel - Division 3 | 9009 Sub Panel - Division 3 | 6 | 0 |
| 9009-4 | 9009 Sub-Panel - Admin | 9009 Sub-Panel - Admin | 2 | 0 |
| 9009-HQ | 9009 Sub Panel - HQ | 9009 Sub Panel - HQ | 6 | 0 |

Add Organization Level

- In the Organization Details panel, enter Identifier(Code), Name, and Description






Note: Identifier (Code), pay pool number, for the pay pool and group levels are provided by the DoD AcqDemo Program Office.

- **Only component and group level administrators can add a new pay pool level. Check with the DoD AcqDemo Program Office before assigning the Identifier (Code). The identifier (Code) is the pay pool number, e.g., 9009.**




- **Click Save**

Add Organization Level

Organization Hierarchy 

Organization Details under 9009 - 9009 Pay Pool  

| Identifier (Code) | Name | Description |
|-------------------|------------------------|--|
| 9009 - Test | 9009 Test Organization | Testing "Add Level" functionality for the Organization Management Module |

Add Level – Pay Pool

1. Menu > Administrator > Organization Management

- To add sub panel level(s) under a sub organization in your pay pool, you have to navigate related sub organization’s details page first. Follow steps highlighted in Navigate to Sub Organization Details Page before you continue to step 2

2. Click Add Level


| Pay Pool Group Id | Pay Pool Id | Name | Description | AcqDemo Employee Count | Non AcqDemo Employee Count |
|-------------------|-------------|--------------------------|---|------------------------|----------------------------|
| | 9000 | 9000 Macro Free Pay Pool | 9000 Macro Free Pay Pool | 62 | 3 |
| | 9009 | 9009 Pay Pool | 9009 Pay Pool | 25 | 4 |
| | 9090 | 9090 Training Pay Pool | 9090 Training Pay Pool | 0 | 2 |
| | 9999 | USER GUIDE PAY POOL | USER GUIDE PAY POOL | 7 | 18 |
| RPM | | Regional Pay Managers | Organization to Assign All Regional Pay Managers. | 0 | 36 |


Showing 1 to 5 of 5 entries


Add Level – Pay Pool


3. In Organization Details panel, switch toggle button Is Pay Pool to Yes
4. Enter Identifier(Code), Name, and Description

Add Organization Level

Organization Hierarchy 

Organization Details under AcqDemo - AcqDemo-PMO 

Is Pay Pool 
 No Yes



Identifier (Code) *

Name *

Description *

Add Level – Pay Pool

5. Set toggle buttons to Yes or No based on your organization’s business rules
 - a. See Organization Details - Pay Pool Controls for toggle key and factor weight settings descriptions mentioned in steps 5 and 6

6. Enter factor weights in Job Achievement and/or Innovation Factor Weight, Communication and/or Teamwork Factor Weight, Mission Support Factor Weight if your pay pool business rules require custom values aside from the default value of 1

The screenshot shows the 'Add Level - Pay Pool' configuration interface. Key elements include:


- Is Pay Pool:** A toggle set to 'Yes' (annotated with a red arrow and 'Pay Pool is Selected as "Yes"').
- Identifier (Code), Name, Description:** Fields for identifying the pay pool (annotated with blue arrows).
- Controls Section:** A grid of toggle buttons for various rules such as 'Use Mandatory Objectives', 'Require Approved Plan', 'Time Off Award', etc. (annotated with a blue circle '5').
- Factor Weight Fields:** Three input fields for 'Job Achievement and/or Innovation Factor Weight', 'Communication and/or Teamwork Factor Weight', and 'Mission Support Factor Weight', all set to '1' (annotated with a blue circle '6' and a red callout).
- Other Fields:** 'CRI Target', 'CA Target', 'Grievance Start/End Date', and 'Employee/Supervisor Target Dates'.



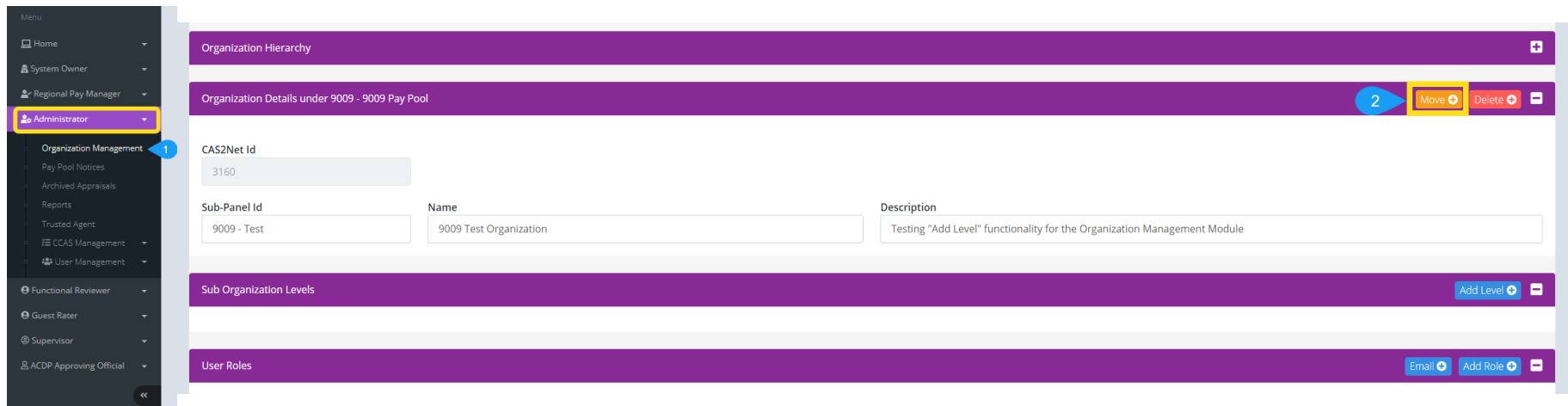
Note: If factor weights are used, administrators MUST NOTIFY the DoD AcqDemo Program Office or at AcqDemo.Contact@hci.mil to ensure the Sub-Panel Meeting Spreadsheet and Compensation Management Spreadsheet are set up for your factor weights.

Move Organization Level

- Moving an organization is usually due to restructuring. In many cases, an Administrator creates a new pay pool and moves employees over to the new pay pool. Once all employees have been successfully moved, the old pay pool or sub-panel can be deleted

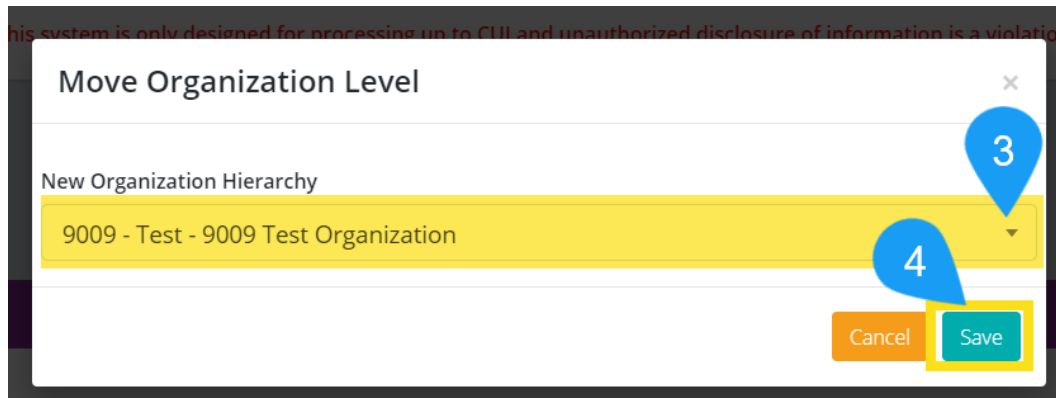
 In CAS2Net, Administrators can move a pay pool and/or sub-panel to another organizational structure. Moving an organization pay pool and/or sub-panel will move all employees listed in that pay pool and/or sub-panel to the new organization group/pay pool To move a Sub Panel or Pay Pool, go to:

1. Menu > Administrator > Organization Management
 - a. To move a sub organization level, follow steps in Navigate to Sub Organization Details Page before continuing with step 2
2. Click Move



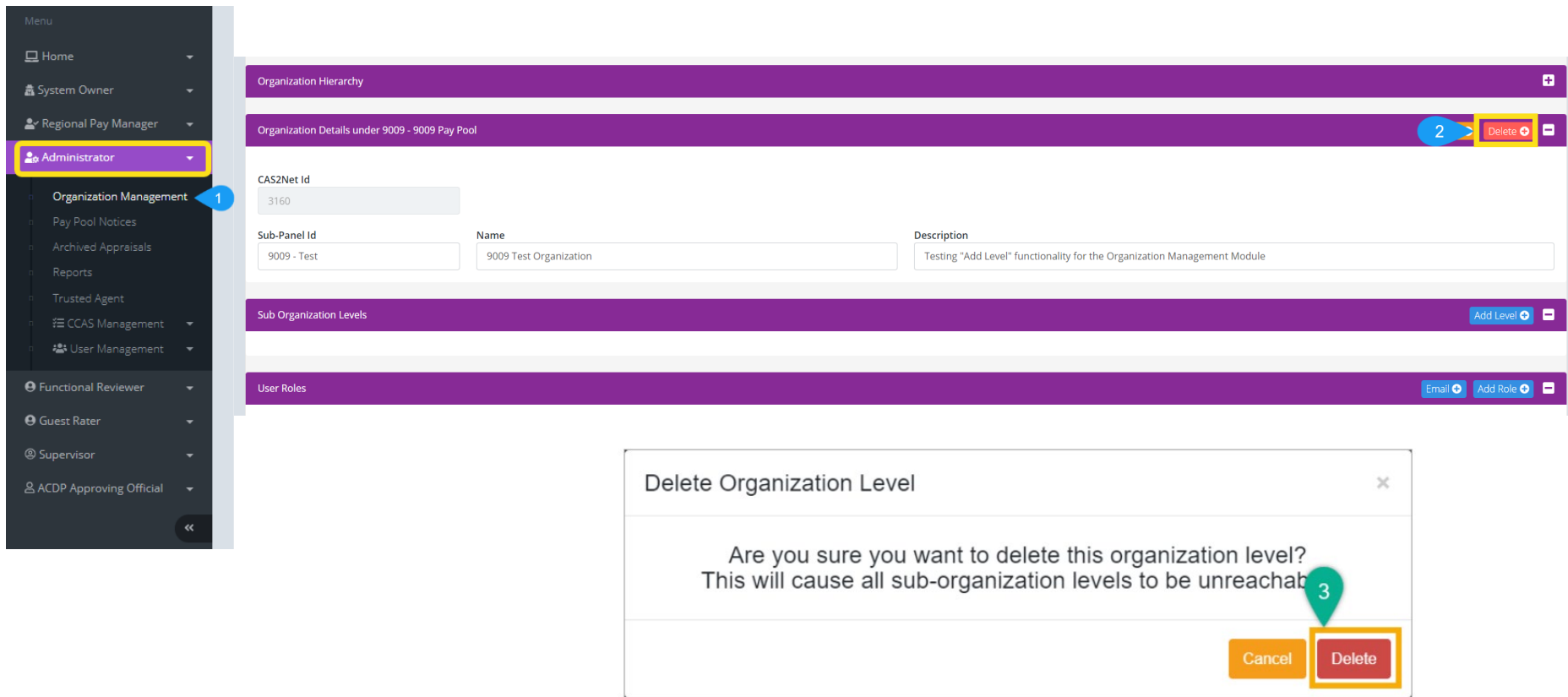
Move Organization Level

3. From dropdown in Move Organization Level dialog, select new organization hierarchy. If there are sub organization under the selected hierarchy, additional dropdowns will appear below your initial organization selection
4. Click Save when you're ready to move the organization



Delete Organization Level

1. Menu > Administrator > Organization Management
 - a. To move a sub organization level, follow steps in Navigate to Sub Organization Details Page before continuing with step 2
2. Click Delete
3. In the Delete Organization Level dialog, click Delete



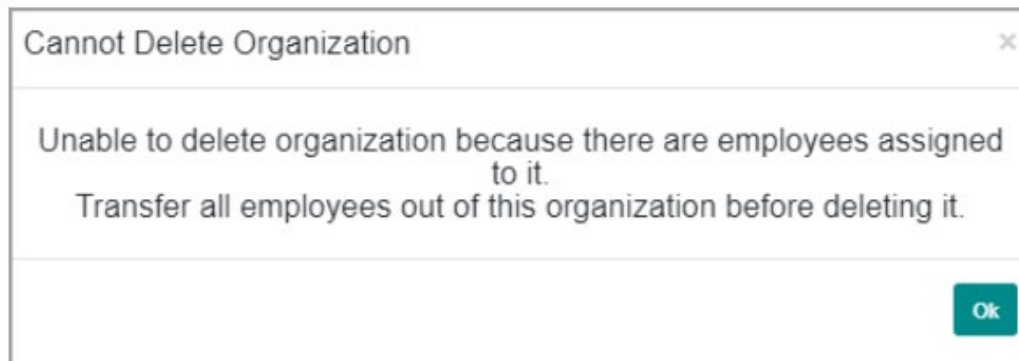
The screenshot illustrates the steps to delete an organization level. On the left, a dark sidebar menu shows the path: Menu > Administrator > Organization Management. A blue callout '1' points to the 'Organization Management' item. The main content area shows the 'Organization Details under 9009 - 9009 Pay Pool' page. A blue callout '2' points to a red 'Delete' button in the top right corner of the details section. Below this, a 'Delete Organization Level' dialog box is displayed. A blue callout '3' points to the red 'Delete' button within the dialog, which is highlighted with a yellow border. The dialog text asks: 'Are you sure you want to delete this organization level? This will cause all sub-organization levels to be unreachable.'

Delete Organization Level

🔑 You must either transfer/remove/delete user roles and accounts to proceed with organization deletion



Note: You'll receive the following error if there are employees assigned to the pay pool you want to delete:



ORGANIZATION ROLES - MANAGER, SECONDARY MANAGER, ADMINISTRATOR, SUPER USER

- **ORGANIZATION ROLES - MANAGER, SECONDARY MANAGER, ADMINISTRATOR, SUPER USER**
- **In CAS2Net, users with Organization Roles support Pay Pool/Subpanel provisioning and management. There are four organization roles and they include Manager, Secondary Manager, Administrator, and Super User.**

Assign Organization Role

1. Menu > Administrator > Organization Management

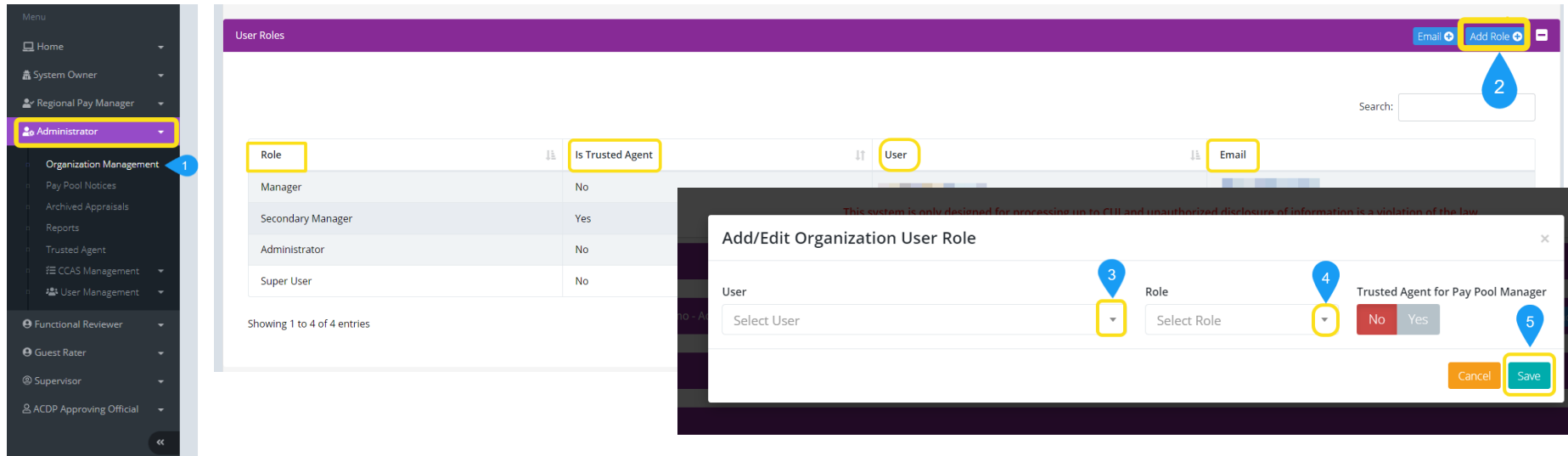
- a. To assign organization role(s) for users at the sub organization level, follow steps covered in Navigate to Sub Organization Details Page of this guide before continuing with step 2

2. In the User Roles panel, click Add Role

3. In Add/Edit Organization Role dialog, select preferred user to assign new role from the User drop-down

4. From the Role dropdown, select role to assign the user

5. Click Save



The screenshot displays the 'User Roles' management interface. On the left, a navigation menu shows 'Administrator' selected, with 'Organization Management' highlighted by a blue callout '1'. The main area shows a table of roles:

| Role | Is Trusted Agent | User | Email |
|-------------------|------------------|------|-------|
| Manager | No | | |
| Secondary Manager | Yes | | |
| Administrator | No | | |
| Super User | No | | |

The 'Add Role' button in the top right is highlighted with a yellow box and a blue callout '2'. An 'Add/Edit Organization User Role' dialog is open, showing:

- 'User' dropdown highlighted with a yellow box and blue callout '3'.
- 'Role' dropdown highlighted with a yellow box and blue callout '4'.
- 'Trusted Agent for Pay Pool Manager' with 'No' and 'Yes' options.
- 'Save' button highlighted with a yellow box and blue callout '5'.

Edit Existing User's Organization Role

1. Menu > Administrator > Organization Management

a. To edit organization role(s) for users at the sub organization level, follow steps in Navigate to Sub Organization Details Page before continuing with step 2

2. From table in User Roles panel, select preferred employee to edit organization role

3. From the Role drop-down in Add/Edit Organization Role dialog, select preferred new role for the user

4. Click Save

The screenshot displays the 'User Roles' interface. On the left, a navigation menu shows 'Administrator' selected, with 'Organization Management' highlighted by a blue callout '1'. The main area shows a table of roles with columns 'Role', 'Is Trusted Agent', 'User', and 'Email'. The 'Secondary Manager' row is highlighted by a blue callout '2'. Below the table, a dialog box titled 'Add/Edit Organization User Role' is open. It shows the user 'LEE, JERRY' and a role dropdown menu with 'Secondary Manager' selected, highlighted by a blue callout '3'. To the right of the dropdown are 'Trusted Agent for Pay Pool Manager' options: 'No' and 'Yes', with 'Yes' selected. A blue callout '4' points to the 'Save' button at the bottom right of the dialog. The dialog also includes 'Delete' and 'Cancel' buttons.

| Role | Is Trusted Agent | User | Email |
|-------------------|------------------|------|-------|
| Manager | No | | |
| Secondary Manager | Yes | | |
| Administrator | No | | |
| Super User | No | | |

Delete Organization Role

1. Menu > Administrator > Organization Management

a. To delete organization role(s) for users at the sub organization level, follow steps in Navigate to Sub Organization Details Page before continuing with step 2

2. From table in User Roles panel, select preferred employee to delete existing organization role

3. In Add/Edit Organization Role dialog, click Delete

4. In Delete Organization User Role dialog, click Delete

The screenshot illustrates the process of deleting an organization role through the Acq Demo application. It shows the navigation menu, the 'User Roles' table, the 'Add/Edit Organization User Role' dialog, and the 'Delete Organization User Role' dialog.

Navigation Menu: The 'Administrator' menu item is highlighted, and 'Organization Management' is selected.

User Roles Table: The table displays the following data:

| Role | Is Trusted Agent | User | Email |
|-------------------|------------------|------|-------|
| Manager | No | | |
| Secondary Manager | Yes | | |
| Administrator | | | |
| Super User | | | |

The 'Secondary Manager' row is highlighted, and the 'Delete' button is visible in the bottom right corner of the table.

Add/Edit Organization User Role Dialog: The dialog shows the 'Trusted Agent for Pay Pool Manager' dropdown set to 'No'. The 'Delete' button is highlighted.

Delete Organization User Role Dialog: The dialog asks 'Are you sure you want to delete this organization user role?' and has 'Cancel' and 'Delete' buttons. The 'Delete' button is highlighted.

2024 Open Forum Schedule

- ✓ 04 January, 1pm – 2:30pm ET: CCAS Pay Transactions
- ✓ 01 February, 1pm – 2:30pm ET: CCAS Grievance, (T) Next Higher Official Process, and Archive/Transfer
- ✓ 07 March, 1pm – 2:30pm ET: Assigning Mandatory Objectives, Mid-Point Review, Additional Feedback, and Closeout Assessment
- ✓ 04 April, 1pm – 2:30pm ET: Communicating with AcqDemo Program Office on CAS2Net and CCAS Issues
- ✓ 02 May, 1pm – 2:30pm ET: Reports – FY-based Reports & Current Settings Reports
- ✓ 06 June, 1pm – 2:30pm ET: Creating Sub-Organization Levels and Assigning Sub-Panel Managers, and User Role Assignments
- 11 July, 1pm – 2:30pm ET: Macro Free Sub Panel Spreadsheet and Compensation Management Spreadsheet (CMS) Introduction
- 01 August, 1pm – 2:30pm ET: CCAS Spreadsheet Test Schedule (Offline Sub-Panel Meeting Spreadsheet, Offline CMS, Macro Free versions, and CAS2Net Online versions)
- 05 September, 1pm – 2:30pm ET: Post Cycle Modules (Appraisal Status, Offline Interface, Previous Cycle Data, Sub-Panel Meeting, CMS Online, and Macro-Free CMS)
- 12 September, 1pm – 2:30pm ET: Transfer, Archive and Post Cycle Activities
- 19 September, 1pm-2:30pm ET End of Cycle Checklist
- 26 September, 1pm-2:30pm ET: Sub Panel Spreadsheet and CMS (Offline, Online, and Macro-Free)
- 03 October, 1pm-2:30pm ET: Discrepancy Reports
- 10 October, 1pm-2:30pm ET: Lock/Unlock Supervisor 1, Sub-Pay Pool and Pay Pool
- 17 October, 1pm-2:30pm ET: Pay Pool Analysis Tool (PPAT)
- 07 November, 1pm-2:30pm ET: Initial and Final Upload
- 21 November, 1pm-2:30pm ET: Not Final Reports and Data Complete Reports
- 05 December, 1pm-2:30pm ET: Grievance/Grievance Window

Open Forum Questions?

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jerry.lee@dau.edu

For user issues, please provide the name, issue, attachment (if any), and, as applicable, a screenshot in the email.

For system issues, such as, cannot access CAS2Net, a screenshot of the error message would pinpoint time and issue.