CAS2Net 2.0 Administrator Training

Organization Management & Mandatory Objectives

Conferencing line:
**Dial: +1 (224) 501-3412**
Access Code: Verify Calendar Invite

Prepared by: Irene Rincon (RGG)
& Jerry Lee (MPF)

Agenda

- Audience
  - Administrators

- Objective: Better Understanding of Administrator Functions in Organization Management & Mandatory Objectives

- Overview of Organization Management Panels
- How to Manage Pay Pools
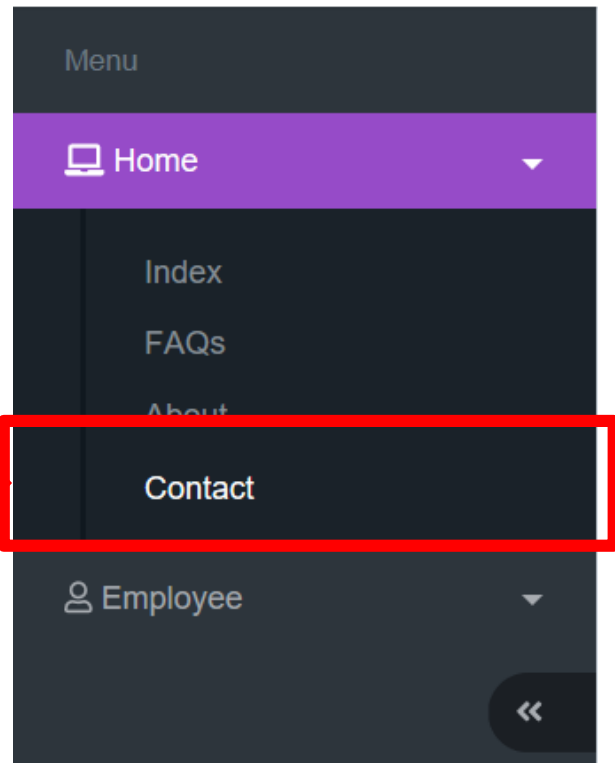- How to Set Mandatory Objectives

Administrator Menu
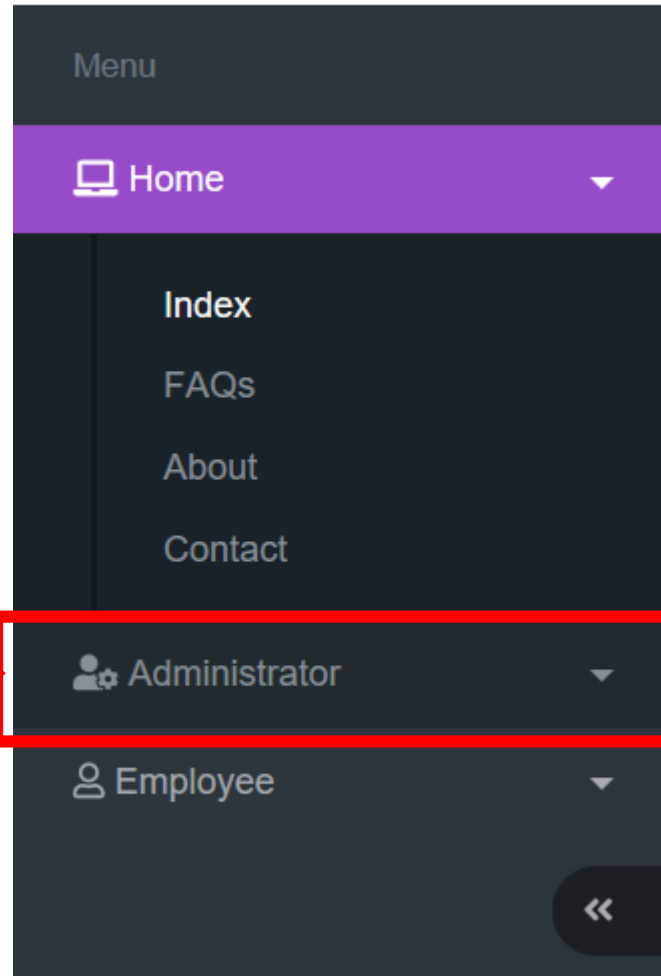
Must have this role in your Menu

Contents

If you do not have the Administrator Menu, open Contact and call your Component/Group POC.

Click

Organization Management Overview

Organization Management

CAS2Net 2.0

- Home
- System Owner
- **Administrator**
  - Appraisal Status
  - Offline Interface
  - Organization Management ← Click
  - Mandatory Objectives
  - Pay Pool Notices
  - eDocuments
  - Reports
  - Trusted Agent
  - User Management
- Supervisor

- **Maintain the Organization's Structure**
  - Pay Pool
  - Sub-Panel
  - Maintain User's Roles (Rights)
- **Set-up Pay Pools Based on Business Rules**
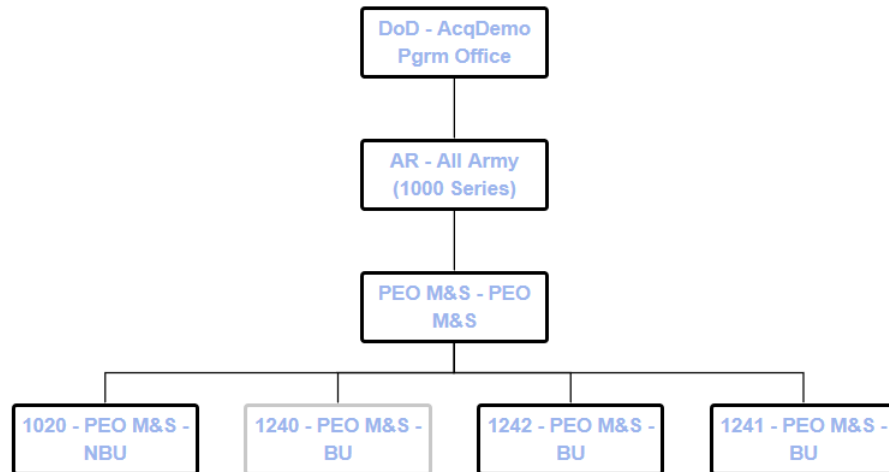
Organization Management

Panel	Defined
Organization Hierarchy	Organization Chart of Pay Pool and Sub-Panel
Organization Details	Pay Pool or Sub-Panel Details
Sub-Organization Levels	List of Sub-Panels Under Pay Pool
User Roles	User Role w/rights to Maintain the Pay Pool or Sub-Panel

Organization Hierarchy

Edit Organization Level

Organization Hierarchy

*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.

Hierarchy Panel click on each outline organization box to expand the view

Component

Group (multiple pay pools)

Organization (single pay pool)

Organization Management:

Organization Details Panel for Component Level, Group Level, Pay Pool Level, Sub-Panel Level

Organization Details

CAS2Net ID# - group, pay pool, or sub-pay pools (system generated)
Pay Pool Group Id
Name
Description

System does allow changes to pay pool or sub-panel names
Caution: Check With Organization Leads Before Making Changes

Component Level

Edit Organization Level

Organization Hierarchy

Organization Details under PMO - AcqDemo Pgrm Offfce   Move ⊕   Delete ⊕

CAS2Net Id:
310

Component Id	Name:	Description:
TEST	TEST COMPONENT	Test Component - Org/Agency Level

Sub Organization Levels   Add Level ⊕

Search:

Pay Pool Group Id ▲	Pay Pool Id	Name	Description
	2117	Team Mines	Underwater Defensive Devices
	AMC/LH	Test PP	Test Pay Pool
	rue pay pool	RPP	test pay pool
	xyz	my paypool	new pay pool
123		HQ	HQ
AcqDemo		AcqDemo Program Office Test	AcqDemo Org Test
AFT		Test AF Data	Legacy Test AF Data

Showing 1 to 7 of 7 entries   Previous   1   Next

User Roles   Add Role ⊕

Group Level – Details View

Edit Organization Level

PMO > TEST > AcqDemo

Organization Hierarchy

Organization Details under TEST - TEST COMPONENT   Move ⊕ Delete ⊕ ▬

CAS2Net Id:
429

Pay Pool Group Id   Name: Description:
AcqDemo   AcqDemo Program Office Test   AcqDemo Org Test

Sub Organization Levels   Add Level ⊕ ▬

Search:

Pay Pool Id ▲	Name	Description
GDIT Pay Pool	GDIT Pay Pool Test	Pay Pool - GDIT

Showing 1 to 1 of 1 entries   Previous 1 Next

User Roles   Add Role ⊕ ➕

Pay Pool Level – Details View

Sub-Panel Level – Details View

Edit Organization Level

PP90909 > PP90909

Organization Hierarchy ➕

Organization Details under PP90909 - Training Pay Pool [Move ⊕] [Delete ⊕] ➖

CAS2Net Id:

3167

Sub-Panel Id

PP90909

Name:

Training Pay Pool

Description:

Training Pay Pool

Sub Organization Levels [Add Level ⊕] ➖

User Roles [Add Role ⊕] ➕

Organization Management :
Sub Organizations Level Panel
&
User Role Panel

Sub-Organization Levels

Allows you to create additional sub-levels
>   Pay Pools
>   Sub-Panels

Pay Pool Id	Name	Description
9900	9900- NBU	NBU
9901	9901- BU	BU
9902	9902 - BU	BU
9903	9903 - BU	BU

Sub Organization Levels   Add Level ⊕

Search:

Add Level

Showing 1 to 4 of 4 entries   Previous | 1 | Next

User Role

User Roles	Add Role ⊕ ▬

Search: [_____]

Role	⬍	User
Super User		Contributor, Joe
Super User		Minister, Ada

Showing 1 to 2 of 2 entries   Previous [1] Next

Add Role
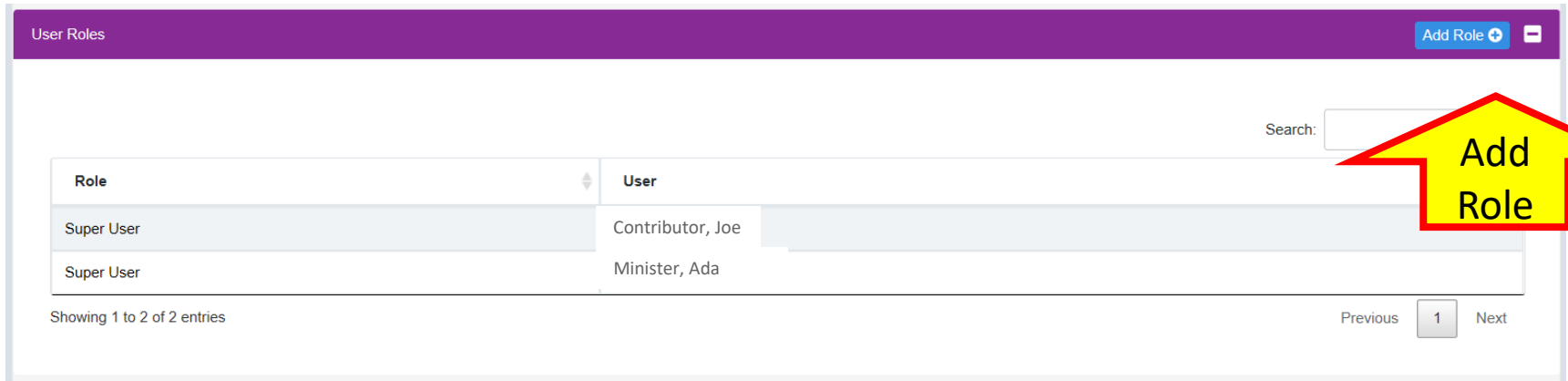
Maintain User Roles for assigned Group, Pay Pool, or Sub-Panel Roles:

- Super User
- Administrator
- Manager (***Only 1 Manager Per Pay Pool***)
- Secondary Manager

User Role

Manager / Secondary Manager	- Only 1 Manager per Pay Pool "Read Only" permissions - Can be at the Component, Organization, Group, Pay Pool, or Sub Panel level. "Secondary Manager" serves a backup when the primary "Manager" is unavailable to perform their CAS2Net duties.
Administrator	"Update" permissions to configure Organization Structure, manage Annual Appraisal processes, manage user records, view/print reports, and view Employee and Supervisor inputs across the annual appraisal cycle. - They can be assigned at the Component, Organization, Group, Pay Pool, or Sub Panel level.
Super User	Same capabilities as the "Administrator", with the additional functionality to impersonate any user within their assigned organization structure.

Organization Management : Maintaining Pays Pools

Organization Details

To set or review the Organization Details
➢ click on the Pay Pool Id

Pay Pool Management

Organization Details under DoD - AcqDemo Pgrm Office   [Refresh Contribution Plans ⊕] [Move ⊕] [Delete ⊕] [▬]

CAS2Net Id:
3132

Is Pay Pool:
No | Yes

Component Id
PP99999

Name:
PM Widget

Description:
PM Widget

Contribution Plan by Factors:	Mandatory Objectives:	Require Supervisor 2 Approval:	Require Employee Initiate:	Assessments Require Approved Plan:	Control Point By OCS:
No | Yes	No | Yes	No | Yes	No | Yes	No | Yes	No | Yes

Job Achievement and/or Innovation Factor Weight:
1

Communication and/or Teamwork Factor Weight:
1

Mission Support Factor Weight:
1

Toggle Keys	
Contribution Plan By Factors	NO – One Box for Plan
	YES – Box per Factor
Mandatory Objectives	NO – No Box for
	YES – Box for
Require Supervisor 2 Approval	NO – Supervisor 1 approves CP, MPR, Closeout, Additional Feedback, Annual
	YES – CP, MPR, Closeout, Additional Feedback, Annual to Supervisor 2 for review and approval
Require Employee Initiate	NO – Supervisor or Employee Can initiate Contribution Plan and Assessments
	YES – Employee initiate Contribution Plan and Assessments
Control Point by OCS	NO – Control Point will be set by salary if listed.
	YES – Control Point by OCS

Pay Pool Mgmt Cont.

> Set Factor Weight based on Pay Pool Business Rules
> CRI and CA imported after round trip (READ ONLY @ Admin level)

Pay Pool Mgmt Cont.

Buttons	Defined
Refresh Contribution Plan	Updates Approved Contribution Plan • Employee CP header information • Mandatory Objectives • Supervisor Information
Move	Move Pay Pool or Sub-Panel to another Org structure
Delete	Delete Pay Pool or Sub-Panel

Refresh Contribution Plan

Refresh Contribution Plan will update the Contribution Plan Header Information on **Approved** Contribution Plans

➢ Update Mandatory Objectives that was updated (added/remove)
➢ Update Supervisor (1 or 2) Information
➢ Employee Profile will updates (i.e.. salary, pay band, etc.)

Add a Sub-Panel

Example: Adding a Sub-panel to the PP90909 Training Pay Pool
Click "Add Level" button in Sub Organization Levels panel

Create Sub-Panel

Acq **Demo**

Add Organization Level

Organization Hierarchy ➕

Organization Details under PP90909 - Training Pay Pool ➖

Identifier (Code)
SP90909-2

Name:
Training Sub-Panel 2

Description:
Training Sub-panel 2 - To ADD

Cancel | Save

Click

Example: Type ID code, Name, and Description
Click "SAVE" button to create

Sub-Panel Successfully Added

Click "SAVE" after any changes
Click "Cancel" to go back to Pay Pool Level

Sub Organizations Level

Edit Organization Level — TEST

Organization Hierarchy ➕

Organization Details under PMO - AcqDemo Pgrm Offfce — Move ⊕ | Delete ⊕ | ➕

Sub Organization Levels — Add Level ⊕ | ➖

Search: _____

Pay Pool Group Id ▲	Pay Pool Id ⇕	Name ⇕	Description ⇕
	2117	Team Mines	Underwater Defensive Devices
	AMC/LH	Test PP	Test Pay Pool
	rue pay pool	RPP	test pay pool
	xyz	my paypool	new pay pool
123		HQ	HQ
AcqDemo		AcqDemo Program Office Test	AcqDemo Org Test
AFT		Test AF Data	Legacy Test AF Data

Showing 1 to 7 of 7 entries — Previous | 1 | Next

3 – Pay Pool Group levels
4 – Pay Pool ID

Move a Sub-Panel

Currently "xyz-Sub1" sub-panel is a sub-Panel under the "XYZ" Pay Pool

Example – Move "xyz-Sub1" sub-panel to 2117 – Team Mines Pay Pool
Select the "Move" button from the Sub-Panel Details panel

Select Organization

Sub-Panel Successfully Moved

Move successful - "xyz-Sub1" sub-panel moved under 2117 Pay Pool

Edit Organization Level   PP90909

Organization Hierarchy

Organization Details under PMO - AcqDemo Pgrm Offce   Refresh Contribution Plans ⊕   Move ⊕   Delete ⊕

Sub Organization Levels   Add Level ⊕

Search:

Sub-Panel Id ▲	Name	Description
PP90909	Training Pay Pool	Training Pay Pool
SP90909-1	Training Sub-Panel 1	Training Sub-Panel 1 - To Delete
SP90909-2	Training Sub-Panel 2	Training Sub-panel 2 - To ADD

← Click

Showing 1 to 3 of 3 entries   Previous   1   Next

User Roles   Add Role ⊕

Example: Delete a Sub-panel SP90909-1
Click on Sub Panel to open it's detail

Delete Sub-Panel

Edit Organization Level   PP90909 > SP90909-1

Organization Hierarchy   ➕

Organization Details under PP90909 - Training Pay Pool   Move ⊕ Delete ⊕ ➖

CAS2Net Id:

3168

Sub-Panel Id	Name:	Description:
SP90909-1	Training Sub-Panel 1	Training Sub-Panel 1 - To Delete

Click ⬆

Sub Organization Levels   Add Level ⊕ ➖

User Roles   Add Role ⊕ ➕

Cancel   Save

Caution: Ensure No Roles, Users, or additional Sub-Panel listed
Click "Delete" Button

Confirm Delete Sub-Panel

Acq Demo

Delete Organization Level   ✕

Are you sure you want to delete this organization level?
This will cause all sub-organization levels to be unreachable.

Cancel   **Delete**   ← Click

Edit Organization Level (Inactive)   PP90909 > SP90909-1

Organization Hierarchy   ➕

Organization Details under PP90909 - Training Pay Pool   Move ⊕ Un-Delete ⊕ ➖

CAS2Net Id: Is Pay Pool:
3168   No   Yes

                              Name: Description:
SP90909-1   Training Sub-Panel 1   Training Sub-Panel 1 - To Delete

Sub Organization Levels   Add Level ⊕ ➖

User Roles   Add Role ⊕   ➕

                                                              Cancel   Save

Sub-Panel Deleted

SP90909-1 No longer appears in Sub-Organization Levels

Mandatory Objectives

➢ How Set Mandatory Objectives

➢ Overview Features

➢ How to Add

➢ How to Maintain/Change

➢ How to Delete

Setting Mandatory Objectives

- ➢ Select Organization Management Menu Option

- ➢ Select Pay Pool you want to allow to set Mandatory Objective

- ➢ Set Mandatory Objectives Toggle Key to YES

Mandatory Objectives

Organization Level Panel

➤ Displays List of Pay Pool(s) drop down list

Mandatory Objectives Panel

➤ Displays list of active Mandatory Objectives

➤ Maintain (Add/Remove) Mandatory Objectives

Add Mandatory Objectives

Click "Add Mandatory Objective"

Add Mandatory Objectives

Add Mandatory Objectives

Mandatory Objectives for PP90909 - Training Pay Pool

Description

Supervisor's Mandatory Objective

Objective Text

Execute the full range of human resources and fiscal responsibilities within established timelines and in accordance with applicable regulations. Strictly enforce merit principles in all personnel actions and selections, and bring attention to any apparent violations. Develop a vision for the work unit; align performance expectations with organizational goals. Objectively assess employee performance/contributions, and provide clear and effective feedback to employees that will enable them to improve their performance and pursue professional development. Maintain a safe work environment and promptly address allegations of noncompliance. Ensure EEO/EC/SHARP principles are adhered to throughout the organization, take immediate corrective action if sexual harassment or other discriminatory/unfair treatment is observed, reported or suspected. Ensure continuing application of, and compliance with, applicable laws, regulations and policies governing prohibited personnel practices; promptly address allegations of prohibited discrimination, harassment, and retaliation. |

Characters: 1077/6000

Auto Save Timeout: New

*Character count may differ from Microsoft W

Click

Cancel   Save

Type Description and Text
Click SAVE

Mandatory Objectives

Once you Save, the Associated panels will appear.

Selecting Associated Users

➢ Filter List Based on criteria

➢ Select All or some

➢ (Example: Supervisor = YES)

Users Associated

The Associated Users to Objective will populate, Then Select "SAVE"

Mandatory Objectives

Once you Save, the Associated panels will appear.

Update a
Mandatory Objectives

Mandatory Objectives Panel
➤ Select Objective to change

Make changes

➤ Make necessary changes

➤ Then "SAVE" update

Delete a Mandatory Objectives

Mandatory Objectives Panel
➢ Select Objective to Delete

Confirm Delete

Delete Mandatory Objective ✕

Are you sure you want to delete this mandatory objective?

Cancel   Delete

Click

Supervisor's Mandatory Objectives No Longer Appears in a List of Mandatory Objectives

List Mandatory Objectives

Organization Level ▬

Select Pay Pool

PP90909 - Training Pay Pool ▾

Mandatory Objectives   Add Mandatory Objective ⊕ ▬

Show 25 ▾ entries   Search:

Delete	Description	▲
🗑	IDP, Certification and CLPs	

Showing 1 to 1 of 1 entries   Previous 1 Next

Open Discussion

AcqDemo Program Support

Additional Resources

- ➤ *CAS2Net 2.0 Users Guide*
- ➤ *Website eLearning:*
  - ➤ *CAS2Net 2.0 for Employees and Supervisors*
  - ➤ *CAS2Net 2.0 for Administrators*
- ➤ *Focus Session Slides*
- ➤ *Electronic Contact Info:*
  - ➤ **Altess ServiceNow Service Desk 24/7/365**
    - ➤ **1-800-981-3234**
    - ➤ **usarmy.radford.peo-eis.other.service-desk@mail.mil**