CAS2Net 2.0
Administrator Training
Functionality

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

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& Jerry Lee (MPF)
Agenda

- Audience
  - Administrators

- Objective: Understand how to navigate CAS2Net functionalities

- Training Knowledge
  - Understand 1.0 Data maintenance functions relate to 2.0 functions
  - Understand where to maintain employee record
    - Understand how to transfer employee record
    - Understand how to archive employee record
  - Understand where to add a new employee record
  - Understand where to manage supervisor assignments
  - Understand where to manage Organization Structures
    - Pay Pools
    - Sub-Panel
    - How to Move a Pay Pool/Sub-Panel
New vs Old

- Access the CAS2Net 2.0 site by going to the following URL: https://cas2net.army.mil

Flexibilities

CAS2Net 1.0

What is the Same:
- Login Access with CAC
- Employees and Supervisor Accounts
  - Contribution Plan and Assessment workflow similar
  - Print Reports

CAS2Net 2.0

What is Different
- Greater Administrator Flexibilities:
  - Pay Pool Management
  - User Management
  - Bulk Update features
  - More detailed Reports
- Dashboards:
  - Administrator
  - Managers
  - Supervisors 1 and 2
Data Maintenance Menu Options

CAS2Net 2.0 uses “User” Vs “Employee”

- Modify/Archive employee record using query form
- Modify/Archive employee record using quick pick list
- Insert New Employee Record
- Assign Supervisors to an Employee
- Assign Employees to a Supervisor
- Replace Supervisor Assignments
- eDocuments Maintenance
- Replace PAS Code
- Replace Office Symbol
- Maintain Pay Pool
- eDocument Transfer

Not available in 2.0:
- Not available in 2.0
- Not available in 2.0

http://acqdemo.hci.mil
Maintain User Record

Query from Table
Query Options: Name, Email, Pay Pool, Pay Pool Manager, Organization level, and or Supervisor

Insert/Add User Record
User Management – User Profile

What can I do in User Profile

- Update User Profile
  - General User Information
  - Organization Information
    - Transfer Employee via “Transfer User”
    - Transfer by changing Organization Level
    - Update rating chain information
    - View Supervisor 1 History

- Assign/Update User Role in Organization Roles (i.e., Admin/Manager role)

- Assign/Update Trusted Agent Information

- Update Post-Cycle Activities

- Archive a User Record

NOTE: Remember to “SAVE” any changes
### User Profile - Part 1

#### Part 1 - Complete this section for all Demo and Non-Demo employees

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>ID</td>
<td>38498</td>
</tr>
<tr>
<td>Prefix</td>
<td></td>
</tr>
<tr>
<td>First Name</td>
<td>test</td>
</tr>
<tr>
<td>Middle Initial</td>
<td></td>
</tr>
<tr>
<td>Last Name</td>
<td>new</td>
</tr>
<tr>
<td>Suffix</td>
<td></td>
</tr>
<tr>
<td>SSN</td>
<td></td>
</tr>
</tbody>
</table>

**General User Information**

- **ID:** 38498
- **Prefix:**
- **First Name:** test
- **Middle Initial:**
- **Last Name:** new
- **Suffix:**
- **SSN:**
- **EDIP:** 0123456789
- **Name:** JOSEPH
- **Title:** Big Time
- **Email:** j.u.test@notnmi.com
- **Phone Number:** 000-111-9035
- **Phone Ext:**
- **DSN:**

**User Access Permissions**

<table>
<thead>
<tr>
<th>Access Permission</th>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td>Can Access CAS2Net 2.0</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Is Demo Employee</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Can Be Supervisor</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Can Be Functional Reviewer</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Can Edit User History</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Can Impersonate Restricted Users</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Major Differences:**

- No ID visible
- No SSN
- Using EDIP
- System access toggle keys

**Part 1 – Toggle Keys**

<table>
<thead>
<tr>
<th>Access Permission</th>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td>Can Access CAS2Net 2.0</td>
<td></td>
<td></td>
</tr>
<tr>
<td>NO – Not Active User</td>
<td></td>
<td></td>
</tr>
<tr>
<td>YES – Active User</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Can Be Functional Reviewer</td>
<td></td>
<td></td>
</tr>
<tr>
<td>NO – Not a Supervisor</td>
<td></td>
<td></td>
</tr>
<tr>
<td>YES – Is a Supervisor</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Can Edit User History</td>
<td></td>
<td></td>
</tr>
<tr>
<td>NO – Non Civilian</td>
<td></td>
<td></td>
</tr>
<tr>
<td>AcqDemo Employee (Cont/Mil)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Is Regional Manager</td>
<td></td>
<td></td>
</tr>
<tr>
<td>NO – Civilian AcqDemo Employee</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Can Impersonate Restricted Users</td>
<td></td>
<td></td>
</tr>
<tr>
<td>YES – Not a Functional Reviewer</td>
<td></td>
<td></td>
</tr>
<tr>
<td>YES – Functional Reviewer</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Is System Owner</td>
<td></td>
<td></td>
</tr>
<tr>
<td>PMO Level Only</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Can Edit User History</td>
<td></td>
<td></td>
</tr>
<tr>
<td>PMO Level Only</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Is Regional Manager</td>
<td></td>
<td></td>
</tr>
<tr>
<td>PMO Level Only</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Can Impersonate Restricted Users</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Major Differences in Part 2

- All Salary Details are located in Salary Information Panel
- Service information not collected
- Functional Reviewer
- Matrix function
- Transfer User
  - Validates Closeout Assessments and Employee assignments
Salary Information & Wildcards

Additional Panels:

- Salary Information
  - Update Presumptive Ratings, Control Point OCS or Control Point Salary, Basic Pay and Locality
  Items grayed out are updated via CMS or higher access required

- Other User Information
  - Wildcard fields (Additional fields to track users information)
Transfer User button

Use the Transfer function to move an employee into Transfer

Validates Closeout Assessments and Employee assignments
Closeout Requirement for Transfers

An employee MUST have a closeout assessment before they transfer, if not, the Administrator can submit the supervisor’s closeout comments.
Administrator Supervisor’s Comment

Closeout Requirement for Transfers

An employee MUST have a closeout assessment before they transfer, if not, the Administrator can submit the supervisor’s closeout comments.

IAW the DoD Employee Movement Matrix Table 2, employee is reassigned from an AcqDemo pay pool to another AcqDemo pay pool with less than 90 days since the beginning of the rating period on 1 Oct, a closeout is not required.
Confirmation for Transfer

Employees with a completed closeout, the system will confirm you want to transfer the user.

Click Yes or No
Employee is Transferred

Look for the Organization Level Field to indicate the Transfer Pay Pool
How to Receive Employees

Select Employee to Receive from the Transfer List
System allows you the option to select one, some or all employees to receive
The Selected Users table will appear after you select the employee(s).
Click Transfer to transfer the employee records to your pay pool.
Transfer Employees

Transfer menu allows single updates or updates for multiple transferred employees.  
Note: Bulk change is restricted to one selection for each field.  Example: Same Start Date, same Supervisor, etc.

Bulk Change Transfer Employees

Employee List

<table>
<thead>
<tr>
<th>Name</th>
<th>EDPI</th>
<th>Email</th>
</tr>
</thead>
<tbody>
<tr>
<td>Amazzio, Aesa</td>
<td>0000000000</td>
<td><a href="mailto:alexa.amazzio@gmail.com">alexa.amazzio@gmail.com</a></td>
</tr>
<tr>
<td>Artis, Amy</td>
<td>5000000002</td>
<td>any.artis.nov@mil mil</td>
</tr>
</tbody>
</table>

Showing 1 to 2 of 2 entries

Bulk Change Fields

Organization Start Date:

- [Day] [Month] [Year]

Transfer Employees to Organization (Pay Pool/Sub-Panel):
- [Select Organization]

Transfer Employees
- [Select Supervisor 1]
- [Select Supervisor 2]
- [Select Locality]
Archive User Profile

User Profile – Smith, John

<table>
<thead>
<tr>
<th>General User Information</th>
<th>Impersonate User</th>
</tr>
</thead>
<tbody>
<tr>
<td>Organization Information</td>
<td>Refresh Contribution Plan, Transfer User, Supervisor 1 History</td>
</tr>
<tr>
<td>Salary Information</td>
<td></td>
</tr>
<tr>
<td>Other User Information</td>
<td></td>
</tr>
<tr>
<td>Organization Roles</td>
<td></td>
</tr>
<tr>
<td>Trusted Agents</td>
<td></td>
</tr>
</tbody>
</table>

Click "Archive"
Archive User Profile

Click "Yes"
Archive User Profile

Archived record no longer available in List of Assigned Users
How to Assign from Archive/Unassigned Menu

Employee can be received from Archived/Unassigned Pay Pool; similar to Transfers function.
Use the Archive button to archive an employee leaving or separating from AcqDemo.
Note: Archive will not delete their record.
Unassigned/Archive Update

Note: Bulk change in Unassigned/Archived user is restricted to one selection for each field. Example: Same Start Date, same Supervisor, etc.

Bulk Change Unassigned/ Archived Users

<table>
<thead>
<tr>
<th>Name</th>
<th>EDIPI</th>
<th>Email</th>
</tr>
</thead>
<tbody>
<tr>
<td>DUMMY_TEST</td>
<td>0001001001</td>
<td><a href="mailto:IRENE.RINCON.CTR@DAU.MIL">IRENE.RINCON.CTR@DAU.MIL</a></td>
</tr>
</tbody>
</table>

Showing 1 to 1 of 1 entries

Bulk Change Fields

Start Date in Organization
02-13-2019

Assign Employees to Organization (Pay Pool/Sub-Panel)
Select Organization

Supervisor 1
Select Supervisor 1

Supervisor 2
Select Supervisor 2

Locality
Select Locality

http://acqdemo.hci.mil
Add New User

Mandatory Fields * EDIPI, First and Last Name, Email Address, Pay Pool Organization

http://www.hci.mil/

http://acqdemo.hci.mil

Part 3: Complete this section for all employees requiring CASDM access. *CASDM Access* field should be checked.

- CASDM Access: [ ]
- Other Access: [ ]
- Branch: Seric = [ ]
- Other Branch: Seric = [ ]

The information contained herein is covered by the Privacy Act of 1974.
Add New User – General User Information

**Mandatory Fields** * EDIPI, First and Last Name, Email Address, Pay Pool Organization

### General User Information

- **EDIPI Value already exists**: 1174506492
- **Phone Number**
- **Phone Ext**
- **DSN**

#### Email * Required
- **Title**

### Toggle Keys

<table>
<thead>
<tr>
<th>Feature</th>
<th>Options</th>
</tr>
</thead>
<tbody>
<tr>
<td>Can Access CAS2Net 2.0</td>
<td>NO – Not Active User, YES – Active User</td>
</tr>
<tr>
<td>Can Be Supervisor</td>
<td>NO – Not A Supervisor, YES – Is a Supervisor</td>
</tr>
<tr>
<td>Is Demo Employee</td>
<td>NO – Non Civilian AcqDemo Employee (Cont/Mil), YES – Civilian AcqDemo Employee</td>
</tr>
<tr>
<td>Can Be FunctionalReviewer</td>
<td>NO – Not a Functional Reviewer, YES – Functional Reviewer</td>
</tr>
<tr>
<td>Is System Owner</td>
<td>PMO Level Only</td>
</tr>
<tr>
<td>Can Edit User History</td>
<td>PMO Level Only</td>
</tr>
<tr>
<td>Is Regional Manager</td>
<td>PMO Level Only</td>
</tr>
</tbody>
</table>
Add New User
– Organization Information

AcqDemo Start Date: When employee started in AcqDemo (e.g., 05-22-2011)

Start Date in Organization: When employee is assigned to the Organization
(Note 1: This feature is operational with the deployment of CAS2Net 2.0, so it may not be the actual “Start Date in the Organization” for most employees and may be 05-22-2011)
(Note 2: If Conversion Organization: Most cases would be the same date)

* Organization Level (Pay Pool/Sub-Panel) is a Mandatory required field to created the record. Select the appropriate Pay Pool or Sub-Panel for Employee (Note: Non-AcqDemo Employee will have additional group level in option list)

All other fields select appropriate option from drop down menu
Existing User Detail Window

If user exist in the system, “Value Already Exist” Displays above the EDIPI.

Once you tab/enter out of the EDIPI field, a Existing User Detail window will display to show where the employee exist at.

Record may still reside in:
- Previous organization
- Transfer or
- Archived/Unassigned
## Supervisor Assignment

### Action

<table>
<thead>
<tr>
<th>Action</th>
<th>In 2.0</th>
</tr>
</thead>
<tbody>
<tr>
<td>Assign Supervisors to Employee</td>
<td>Single updates will be done in User Management &gt; Assigned in User’s Profile</td>
</tr>
<tr>
<td>Assign Employees to Supervisor</td>
<td>This is considered a Bulk change. You would use Replace Supervisor 1 Menu</td>
</tr>
<tr>
<td>Replace Supervisor Assignments</td>
<td>This is considered a Bulk change. You would use Replace Supervisor 1 Menu</td>
</tr>
</tbody>
</table>
Assign Supervisor to Employee

To Assign Supervisor to Employees
• User Management > Assigned Menu
• Select Employee from Assigned User List
• Scroll to Organization Information panel
• Update Supervisor information
• Save the update

Note:
Sub-Panel and/or Pay Pool Manager information is updated via Organization Management in the appropriate Pay Pool
Assign Employees to a Supervisor

Update Supervisor Assignments

To Assign Supervisor to Employees
- User Management > Supervisor 1
- From Pay Pool Drop Down, Select Pay Pool First
- From Supervisor 1 Drop Down, Select Supervisor
- Select Employee to replace supervisor
- Save the update

Note:
CAS2Net 2.0 will not allow you to change supervisor if Employee does not have Closeout.
Tip: You can update in Employee Profile.
Pay Pool Maintenance

Pay Pool Maintenance is maintain in the Organization Management. Expand the “Organization Details” section to access additional CCAS settings for your organization.

### Edit Organization Level

#### Organization Hierarchy

#### Organization Details under TEST - TEST COMPONENT

<table>
<thead>
<tr>
<th>CA52Net Id</th>
<th>Pay Pool Id</th>
<th>Name:</th>
<th>Description:</th>
</tr>
</thead>
<tbody>
<tr>
<td>830</td>
<td>TEST AMC</td>
<td>Test-AMC/LH-hold</td>
<td>Test-AMC/LH-hold</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Is Pay Pool:</th>
<th>Contribution Plan by Factors:</th>
<th>Mandatory Objectives:</th>
<th>Require Supervisor 2 Approval:</th>
<th>Require Employee Initiate:</th>
</tr>
</thead>
<tbody>
<tr>
<td>No</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>No</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Job Achievement and/or Innovation Factor Weight:</th>
<th>Communication and/or Teamwork Factor Weight:</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>1</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>CRI</th>
<th>CRI Percent</th>
<th>CRI Set-Aside</th>
<th>CRI Min Amount</th>
<th>CRI Min Carry</th>
</tr>
</thead>
<tbody>
<tr>
<td>0</td>
<td>2.25%</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>CA</th>
<th>CA Percent</th>
<th>CA Set-Aside</th>
<th>CA Min Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>0</td>
<td>1%</td>
<td>$0</td>
<td>$0</td>
</tr>
</tbody>
</table>
Pay Pool Maintenance

Maintain Pay Pool

Pay Pool: 1000

Allow Contribution Planning Mandatory Objectives? ○ Yes ○ No

[Full Access User ONLY] Contribution Planning By Factor? ○ Yes ○ No

[Full Access User ONLY] Allow Pay Pool Appraisal Print Option? ○ Yes ○ No

Update

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 must initiate
YES – Employee initiate Contribution Plan and Assessments

Please send comments/suggestions about this form to CAS2Net Support

Organization Details under TEST - TEST COMPONENT

Name: Test AMOLH - held
Description: Test AMOLH - held

Contribution Plan by Factors: No Yes
Mandatory Objectives: No Yes
Require Supervisor 2 Approval: No Yes
Require Employee Initiate: No Yes

Job Achievement and/or Innovation Factor Weight: 1
Communication and/or Teamwork Factor Weight: 1
Mission Support Factor Weight: 1

CRI: 0
CRI Percent: 2.20%
CRI Set Aside: 3
CRI Min Amount: $0
CRI Min Carry: $0

CA: 0
CA Percent: 1%
CA Set Aside: 3
CA Min Amount: $0

Sub Organization Levels

Search:

Sub-Panel Id: Name
PPAMOLH - hold SP1: SP Mgr gOG ARNOLD
PPAMOLH - hold SP2: SP Mgr gAN CURTIS
PPAMOLH - hold SP3: SP Mgr gHELENA GONZALEZ

Sub-Panel Id Name Description

Showing 1 to 3 of 3 entries

User Roles

Search:

Role User

Showing no to 0 of 0 entries

No data available in table

http://www.hci.mil/
http://acqdemo.hci.mil
Add a Role to User Profile

There are two ways to add a role to a user
- User’s Profile
- Organization management

Once the User’s Records is updated
- Scroll to “Organization Roles” section and expand the panel
- Select the “Add Role” Button
Update/Assign Roles – Organization Management

Administrators assign and maintain User Roles in their organization profile

- Open User Roles Section of the organization you want to assign a role in
- Select “Add Role” button
Add User Role

Refer to your organization’s management team to identify which individuals have a special role in CAS2Net 2.0
Flexibilities in Pay Pool Management

CAS2Net 2.0 allows you the flexibility to manage your organization’s structure
- Update Pay Pool and/or Sub-Panels
- Move a Pay Pool and/or Sub-Panels
- Delete a Pay Pool and/or Sub-Panel

All of your Pay Pool Management is Managed in “Organization Management” Menu Option

Caution: Before Moving or Deleting Pay Pools and/or Sub-panels, it is recommended you download an Employee Data Report first.
Moving a Pay Pool

Go to Organization Management to select the pay pool or sub-panel you need to move.

This Example: RUE Pay Pool is being moved to 123 Pay Pool Group

Begin by selecting the Pay Pool you want to move
Moving a Pay Pool

Once the Pay Pool or sub-panel you want to move opens
Select “Move” button in Organization Detail section
Confirmed a Move

Next, Select the Organization area you want to move it to. After select Save button.

A new screen will show and you will see the navigation Bread crumb update. You can also see if in the 123 Sub-Organization Levels listing.
Deleting a Pay Pool
Open Discussion

QUESTIONS
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