CAS2Net 2.0
Administrator Training

Organization Management & Mandatory Objectives

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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
Must have this role in your Menu
Contacts

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

- 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
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
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

### Organization Details under PMO - AcqDemo Perm Office

**CA 52 Net Id:**

310

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

### Sub Organization Levels

<table>
<thead>
<tr>
<th>Pay Pool Group Id</th>
<th>Pay Pool Id</th>
<th>Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>2117</td>
<td>Team Mines</td>
<td></td>
<td>Underwater Defensive Devices</td>
</tr>
<tr>
<td>AMO/LH</td>
<td>Test PP</td>
<td></td>
<td>Test Pay Pool</td>
</tr>
<tr>
<td>rue pay pool</td>
<td>RPP</td>
<td></td>
<td>test pay pool</td>
</tr>
<tr>
<td>xyz</td>
<td>my paypool</td>
<td></td>
<td>new pay pool</td>
</tr>
<tr>
<td>123</td>
<td>HQ</td>
<td></td>
<td>HQ</td>
</tr>
<tr>
<td>AcqDemo</td>
<td>AcqDemo Program Office Test</td>
<td></td>
<td>AcqDemo Org Test</td>
</tr>
<tr>
<td>AFT</td>
<td>Test AF Data</td>
<td></td>
<td>Legacy Test AF Data</td>
</tr>
</tbody>
</table>

Showing 1 to 7 of 7 entries
**Group Level – Details View**

### Edit Organization Level

<table>
<thead>
<tr>
<th>Organization Hierarchy</th>
</tr>
</thead>
</table>

### Organization Details under TEST - TEST COMPONENT

- **Move**
- **Delete**

#### CA S2Net Id:
- 429

#### Pay Pool Group Id
- AcqDemo

#### Name:
- AcqDemo Program Office Test

#### Description:
- AcqDemo Org Test

### Sub Organization Levels

<table>
<thead>
<tr>
<th>Pay Pool Id</th>
<th>Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>GDIT Pay Pool</td>
<td>GDIT Pay Pool Test</td>
<td>Pay Pool - GDIT</td>
</tr>
</tbody>
</table>

Showing 1 to 1 of 1 entries

### User Roles

**Add Role**
Sub-Panel Level – Details View
Organization Management: Sub Organizations Level Panel & User Role Panel
Sub-Organization Levels

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

Add Role
# User Role

<table>
<thead>
<tr>
<th>Role</th>
<th>Permissions and Details</th>
</tr>
</thead>
</table>
| 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

Click on Pay Pool Id
## Pay Pool Management

### Organization Details under DoD - AcqDemo Pgm Office

<table>
<thead>
<tr>
<th>CAS2Net Id:</th>
<th>Pay Pool:</th>
</tr>
</thead>
<tbody>
<tr>
<td>3132</td>
<td>Yes</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Component Id</th>
<th>Name:</th>
<th>Description:</th>
</tr>
</thead>
<tbody>
<tr>
<td>PP99999</td>
<td>PM Widget</td>
<td>PM Widget</td>
</tr>
</tbody>
</table>

### Contribution Plan by Factors:

<table>
<thead>
<tr>
<th>No</th>
<th>Yes</th>
</tr>
</thead>
</table>

### Mandatory Objectives:

<table>
<thead>
<tr>
<th>No</th>
<th>Yes</th>
</tr>
</thead>
</table>

### Require Supervisor 2 Approval:

<table>
<thead>
<tr>
<th>No</th>
<th>Yes</th>
</tr>
</thead>
</table>

### Require Employee Initiate:

<table>
<thead>
<tr>
<th>No</th>
<th>Yes</th>
</tr>
</thead>
</table>

### Assessments Require Approved Plan:

<table>
<thead>
<tr>
<th>No</th>
<th>Yes</th>
</tr>
</thead>
</table>

### Control Point By OCS:

<table>
<thead>
<tr>
<th>No</th>
<th>Yes</th>
</tr>
</thead>
</table>

### No – One Box for Plan
### Yes – Box per Factor

### No – No Box for
### Yes – Box for

### NO – Supervisor 1 approves CP, MPR, Closeout, Additional Feedback, Annual
### YES – CP, MPR, Closeout, Additional Feedback, Annual to Supervisor 2 for review and approval

### NO – Supervisor or Employee Can initiate Contribution Plan and Assessments
### YES – Employee initiate Contribution Plan and Assessments

### NO – Control Point will be set by salary if listed.
### YES – Control Point by OCS

### Toggle Keys

<table>
<thead>
<tr>
<th>Contribution Plan By Factors</th>
<th>NO – One Box for Plan</th>
<th>YES – Box per Factor</th>
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<tbody>
<tr>
<td>Mandatory Objectives</td>
<td>NO – No Box for</td>
<td>YES – Box for</td>
</tr>
<tr>
<td>Require Supervisor 2 Approval</td>
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<td>NO – Control Point will be set by salary if listed.</td>
<td>YES – Control Point by OCS</td>
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</table>
➢ Set Factor Weight based on Pay Pool Business Rules
➢ CRI and CA imported after round trip (READ ONLY @ Admin level)
## Pay Pool Mgmt Cont.

### Organization Details under DoD - AcqDemo Pgm Office

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>CAS2Net Id</td>
<td>3132</td>
</tr>
<tr>
<td>Is Pay Pool</td>
<td>Yes</td>
</tr>
<tr>
<td>Component Id</td>
<td>PP99999</td>
</tr>
<tr>
<td>Name</td>
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### Buttons Defined

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<tr>
<td>Refresh Contribution Plan</td>
<td>Updates Approved Contribution Plan</td>
</tr>
<tr>
<td></td>
<td>- Employee CP header information</td>
</tr>
<tr>
<td></td>
<td>- Mandatory Objectives</td>
</tr>
<tr>
<td></td>
<td>- Supervisor Information</td>
</tr>
<tr>
<td>Move</td>
<td>Move Pay Pool or Sub-Panel to another Org structure</td>
</tr>
<tr>
<td>Delete</td>
<td>Delete Pay Pool or Sub-Panel</td>
</tr>
</tbody>
</table>

- Contribute Plan by Factors: **Yes**
- Mandatory Objectives: **Yes**
- Require Supervisor 2 Approval: **No**
- Require Employee Initiate: **Yes**
- Assessments Require Approved Plan: **Yes**
- Control Point By OCS: **Yes**
- Job Achievement and/or Innovation Factor Weight: 1
- Communication and/or Teamwork Factor Weight: 1
- Mission Support Factor Weight: 1
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.)
Example: Adding a Sub-panel to the PP90909 Training Pay Pool
Click “Add Level” button in Sub Organization Levels panel
Create Sub-Panel

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**

**Organization Hierarchy**

**Organization Details under PMO - AcqDemo Pgm Office**

**Sub Organization Levels**

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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

Move Organization Level

New Organization Hierarchy

Select Option

Cancel  Save

Move Organization Level

New Organization Hierarchy

TEST - TEST COMPONENT

2117 - Team Mines

Cancel  Save
Sub-Panel Successfully Moved

Move successful - “xyz-Sub1” sub-panel moved under 2117 Pay Pool
Select Sub-Panel to Delete

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

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

Delete Organization Level

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

Click

Edit Organization Level (Inactive)
### 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

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.

Auto Save Timeout: New

Type Description and Text
Click SAVE
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 necessary changes

Then “SAVE” update
Delete a Mandatory Objectives

Mandatory Objectives Panel
➢ Select Objective to Delete
Confirm Delete

Are you sure you want to delete this mandatory objective?

Click Delete

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