United States Department of Defense (DoD)

Acquisition Workforce Demonstration Project (AcqDemo)

Contribution-based Compensation and Appraisal System Software (CAS2Net)

Contract GS-35F-4594G Task Order (TO) FA7014-08-F-0011

CAS2NET USER GUIDE (CUG)

Version 11.0

September 30, 2011

Document Control Number: CUG2011-GS-35F-4594G11.0

Prepared for:

United States Department of Defense (DoD)
Acquisition Workforce Demonstration Project (AcqDemo)

Prepared by:
SRA International, Inc.
3434 Washington Blvd
Arlington, VA 22201

Document Change History

The table below identifies changes that have been incorporated into each version.

Date	Version #	Change Description
10/1/2001	1.0	Initial Draft
9/30/2011	11.0	Brought up-to-date for 2011 Enhancements and reformatted document by user role.

CONTENTS

1. INTRODUCTION 1-1

1.1 PURPOSE 1-1
1.2 SCOPE 1-1
1.3 DOCUMENT OVERVIEW 1-1

2. CAS2NET OVERVIEW 2-1

2.1 CAS2NET OVERVIEW 2-1
2.2 WHO SHOULD USE THIS GUIDE? 2-1
2.3 ACCESS AND AUTHORIZATION 2-2
2.4 OWNERSHIP OF PERFORMANCE APPRAISAL AND REVIEW WORKFLOW 2-2
2.5 CAS2NET CONVENTIONS 2-2

3. USER AUTHENTICATION AND AUTHORIZATION 3-4

3.1 USER LOGIN AND ROLE BASED MENU 3-4
3.2 LOGOUT 3-10
3.3 PASSWORD MAINTENANCE 3-10

4. EMPLOYEE 4-1

4.1 CONTRIBUTION PLANNING 4-1
4.2 MID-POINT REVIEW SELF-ASSESSMENT 4-3
4.3 ANNUAL APPRAISAL SELF-ASSESSMENT 4-4
4.4 REPORTS 4-5

5. LEVEL 1 SUPERVISOR 5-1

5.1 CONTRIBUTION PLANNING 5-1
5.2 ADDITIONAL FEEDBACK 5-5
5.3 MID-POINT REVIEW 5-8
5.4 ANNUAL APPRAISAL 5-9
5.5 REPORTS 5-12

6. LEVEL 2 SUPERVISOR 6-1

6.1 SUB-PANEL MEETING 6-1
6.1.1 PRELIMINARY (CATEGORICAL) SCORE MODULE 6-2
6.1.2 INTEGER (FINAL) SCORE MODULE 6-4
6.1.3 COMPOSITE SCORE MODULE 6-5
6.1.4 PRESUMPTIVE EMPLOYEES LIST 6-5
6.1.5 OFFLINE SUB-PANEL MEETING 6-6
6.2 APPRAISAL STATUS 6-8
6.3 REPORTS 6-9

7. PAYPOOL MANAGER 7-1

7.1 SUB-PANEL MEETING 7-1
7.1.1 PRELIMINARY (CATEGORICAL) SCORE MODULE 7-2
7.1.2 INTEGER (FINAL) SCORE MODULE 7-4
7.1.3 COMPOSITE SCORE MODULE 7-5
7.1.4 PRESUMPTIVE EMPLOYEES LIST 7-5

7.1.5 OFFLINE SUB-PANEL MEETING 7-6
7.2 APPRAISAL STATUS 7-8
7.3 REPORTS 7-9

8. DATA MAINTAINER 8-1

8.1 APPRAISAL STATUS AND LOCK 8-2
8.2 REPORTS 8-3
8.3 DATA MAINTENANCE 8-5
8.3.1 CREATE EMPLOYEE RECORD 8-5
8.3.2 MODIFY/DELETE EMPLOYEE RECORD 8-8
8.3.3 TRANSFER PAYPOOL 8-14
8.3.4 RECORD POST-CYCLE ACTIVITIES 8-18
8.3.5 CREATE SUPERVISORY STRUCTURE; OBTAIN CAC EDIPI 8-19
8.3.6 ASSIGN SUPERVISORS TO AN EMPLOYEE 8-24
8.3.7 ASSIGN EMPLOYEES TO SUPERVISOR 8-26
8.3.8 REPLACE SUPERVISOR ASSIGNMENTS 8-28
8.4 OFFLINE INTERFACE 8-30
8.4.1 DOWNLOAD EMPLOYEE DATA 8-30
8.4.2 UPLOAD EMPLOYEE DATA 8-31
8.5 PAYPOOL NOTICES 8-33

9. SUPERUSER 9-1

9.1 REPORTS 9-2
9.2 SESSION MAINTENANCE 9-3

10. CAS2NET REPORTS 10-1

10.1 EMPLOYEE REPORTS 10-1
10.1.1 CONTRIBUTION PLANNING 10-1
10.1.2 MID-POINT REVIEW SELF-ASSESSMENT 10-2
10.1.3 ADDITIONAL FEEDBACK 10-2
10.1.4 ANNUAL APPRAISAL SELF-ASSESSMENT 10-3
10.2 SUPERVISOR REPORTS 10-4
10.2.1 CONTRIBUTION PLANNING – SINGLE EMPLOYEE 10-4
10.2.2 CONTRIBUTION PLANNING – ALL EMPLOYEES 10-5
10.2.3 ADDITIONAL FEEDBACK – SINGLE EMPLOYEE 10-6
10.2.4 ADDITIONAL FEEDBACK – ALL EMPLOYEES 10-7
10.2.5 MID-POINT REVIEW 10-8
10.2.6 APPRAISAL FORM PARTS II AND III – SINGLE EMPLOYEE 10-8
10.2.7 APPRAISAL FORM PARTS II AND III – ALL EMPLOYEES 10-11
10.2.8 APPRAISAL FORM PART II BY EMPLOYEE 10-13
10.2.9 APPRAISAL FORM PART II BY SUPERVISOR 10-15
10.2.10 APPRAISAL STATUS REPORT 10-17
10.2.11 DOWNLOAD EMPLOYEE DATA 10-18
10.2.12 EMPLOYEE ROSTER REPORT 10-19
10.2.13 POST CYCLE ACTIVITY REPORT 10-21
10.2.14 SUPERVISOR ROSTER BY EMPLOYEE REPORT 10-22
10.2.15 SUPERVISOR ROSTER BY SUPERVISOR REPORT 10-23
10.2.16 ZONE A/CIP REPORT 10-24

LIST OF FIGURES

Figure 3-1: Usage Policy Screen 3-4
Figure 3-2: CAC Logo Screen 3-4
Figure 3-3: Digital Certification Selection Screen 3-5
Figure 3-4: CAC Pin Entry Screen 3-5
Figure 3-5: CAS2Net Welcome Screen 3-5
Figure 3-6: Employee Log In 3-6
Figure 3-7: Level 1 Supervisor Log In 3-6
Figure 3-8: Level 2 Supervisor Log In 3-7
Figure 3-9: Paypool Manager Log In 3-7
Figure 3-10: Data Maintainer Log In 3-8
Figure 3-11: Superuser Log In 3-9
Figure 3-12: "Multiple Roles" Log In 3-9
Figure 3-13: Log Out Message 3-10
Figure 3-14: Password Maintenance Screen 3-11
Figure 3-15: Password Maintenance – Success! 3-11
Figure 3-16: Password Maintenance – Failure! 3-11
Figure 4-1: Employee Contribution Planning Web Form 4-1
Figure 4-2: "Release" Employee Contribution Planning 4-2
Figure 4-3: "Next Cycle Year" Employee Contribution Planning Web Form 4-3
Figure 4-4: Annual Appraisal Self-Assessment Web Form 4-4
Figure 4-5: Employee Reports Menu 4-5
Figure 4-6: Sample Employee Report 4-5
Figure 5-1: Supervisor Contribution Planning Status 5-2
Figure 5-2: Supervisor Contribution Planning Web Form 5-2
Figure 5-3: "Modify" Contribution Planning 5-3
Figure 5-4: "Next Cycle Year" Contribution Planning Status 5-4
Figure 5-5: "Next Cycle Year" Supervisor Contribution Planning Web Form 5-4
Figure 5-6: Supervisor Additional Feedback Status 5-5
Figure 5-7: Supervisor Additional Feedback Web Form 5-6
Figure 5-8: "Create" Additional Feedback 5-7
Figure 5-9: Annual Appraisal Status 5-9
Figure 5-10: Annual Appraisal Web Form 5-10
Figure 5-11: Level 1 Supervisor Reports Menu 5-12
Figure 5-12: Level 1 Supervisor Employee Report Generation Options 5-13
Figure 5-13: Level 1 Supervisor Single Employee Report Sample 5-13
Figure 5-14: Level 1 Supervisor All Employees Report Sample 5-14
Figure 6-1: Sub Panel Meeting Menu 6-1
Figure 6-2: Preliminary (Categorical) Score Module "Selection" 6-2
Figure 6-3: Preliminary (Categorical) Score Module "List of Scores" 6-2
Figure 6-4: Preliminary (Categorical) Score Module Web Page 6-3
Figure 6-5: Sub-Panel Meeting Integer (Final) Score Module Web Page 6-4
Figure 6-6: Composite Score Module Web Page 6-5
Figure 6-7: Presumptive Employees List 6-5
Figure 6-8: Sub Panel Meeting "Offline Interface" Menu 6-6
Figure 6-9: Offline Interface – Download Employee Data 6-6
Figure 6-10: Offline Interface – Upload Employee Data 6-7
Figure 6-11: Level 2 Supervisor Appraisal Status 6-8
Figure 6-12: Level 2 Supervisor Appraisal Status Employee Details 6-8
Figure 6-13: Level 2 Supervisor Reports Menu 6-9
Figure 7-1: Sub Panel Meeting Menu 7-1
Figure 7-2: Preliminary (Categorical) Score Module "Selection" Menu 7-2
Figure 7-3: Preliminary (Categorical) Score Module "List of Scores" 7-2
Figure 7-4: Preliminary (Categorical) Score Module Web Page 7-3
Figure 7-5: Sub-Panel Meeting Integer (Final) Score Module Web Page 7-4

Figure 7-6: Composite Score Module Web Page 7-5
Figure 7-7: Presumptive Employees List 7-5
Figure 7-8: Sub Panel Meeting "Offline Interface" Menu 7-6
Figure 7-9: Offline Interface – Download Employee Data 7-6
Figure 7-10: Offline Interface – Upload Employee Data 7-7
Figure 7-11: Paypool Manager Appraisal Status 7-8
Figure 7-12: Level 2 Supervisor Appraisal Status Employee Details 7-8
Figure 7-13: Paypool Manager Reports Menu 7-9
Figure 8-1: Data Maintainer - Appraisal Status and Lock 8-2
Figure 8-2: Data Maintainer Reports Menu 8-3
Figure 8-3: Employee Roster Report Generation Options 8-3
Figure 8-4: Employee Roster Report 8-4
Figure 8-5: Data Maintenance – Employee Maintenance Menu 8-5
Figure 8-6: Add Employee Record Web Form 8-7
Figure 8-7: Search Employee Record Query Form 8-9
Figure 8-8: Search Employee Record Query Results 8-10
Figure 8-9: Modify/Delete Employee Record Using Quick Pick List 8-10
Figure 8-10: Employee Detail Web Form 8-11
Figure 8-11: Occupational Series "List of Values" 8-13
Figure 8-12: Transfer Paypool – Data Maintenance Menu 8-14
Figure 8-13: Transfer Paypool – Employee Search Query Form 8-14
Figure 8-14: Transfer Paypool – Search by "From" Paypool 8-15
Figure 8-15: Transfer Paypool – Employee Search "Find" buttons 8-15
Figure 8-16: Transfer Paypool – Search Results 8-16
Figure 8-17: Transfer Paypool – Employee Detail Input 8-16
Figure 8-18: Transfer Paypool – "To" Paypool Selection 8-17
Figure 8-19: Transfer Paypool – Employee Detail Update 8-17
Figure 8-20: Temporary Promotion Web Form 8-18
Figure 8-21: Windows ActivClient Icon 8-19
Figure 8-22: Smart Card Info Icon 8-20
Figure 8-23: Smart Card Information Screen 8-20
Figure 8-24: Insert New Employee Record Link 8-21
Figure 8-25: Add Employee Record – Part 1 8-21
Figure 8-26: Add Employee Record – Part 2 8-22
Figure 8-27: Add Employee Record – Part 3 8-22
Figure 8-28: Add Employee Record Successful 8-23
Figure 8-29: Assign Supervisors to an Employee Link 8-24
Figure 8-30: Assign Supervisors to an Employee Web Form 8-24
Figure 8-31: Assign Supervisors to an Employee – Supervisor Selection 8-25
Figure 8-32: Assign Supervisors to an Employee Successful 8-25
Figure 8-33: Assign Employees to Supervisor Link 8-26
Figure 8-34: Assign Employees to Supervisor – Supervisor Selection 8-26
Figure 8-35: Assign Employees to Supervisor – Employees Selection 8-27
Figure 8-36: Replace Supervisor Assignments Link 8-28
Figure 8-37: Update Supervisor Assignments – Supervisor Selection 8-28
Figure 8-38: Replace Supervisor Assignments – Update 8-29
Figure 8-39: Replace Supervisor Assignments Successful 8-29
Figure 8-40: Offline Interface Menu 8-30
Figure 8-41: Offline Interface – Download Employee Data 8-31
Figure 8-42: Offline Interface – Upload Employee Data 8-32
Figure 8-43: Paypool Notices List 8-33
Figure 9-1: Superuser Reports Menu 9-2
Figure 9-2: Session Maintenance Screen 9-3
Figure 9-3: Session Maintenance – "Current Role Is…" Screen 9-4
Figure 10-1 : Employee Reports Menu 10-1
Figure 10-2 : Employee Contribution Planning Report 10-2

Figure 10-3: Employee Additional Feedback Report 10-2
Figure 10-4: Annual Appraisal Self-Assessment Report 10-3
Figure 10-5: Supervisor Reports Menu 10-4
Figure 10-6: Contribution Planning Report – Single Employee Selection 10-4
Figure 10-7: Contribution Planning Report – Single Employee 10-5
Figure 10-8: Contribution Planning Report – All Employees Selection 10-5
Figure 10-9: Additional Feedback Report – Single Employee Selection 10-6
Figure 10-10: Additional Feedback Report – Single Employee 10-7
Figure 10-11: Additional Feedback Report - All Employees Selection 10-8
Figure 10-12: Appraisal Form Parts II and III – Single Employee Selection 10-9
Figure 10-13: Appraisal Form Parts II and III – Single Employee, Part II 10-10
Figure 10-14: Appraisal Form Parts II and III – Single Employee, Part III 10-11
Figure 10-15: Appraisal Form Parts II and III – All Employees Selection 10-12
Figure 10-16: Annual Appraisal Report Parts II and III – All Employees, Cover Page 10-12
Figure 10-17: Appraisal Form Part II by Employee Report Selection 10-13
Figure 10-18: Appraisal Form Part II by Employee Report 10-14
Figure 10-19: Apraisal Form Part II Selection 10-15
Figure 10-20: Appraisal Form Part II by Supervisor (PAGE 1) 10-15
Figure 10-21: Appraisal Form Part II by Supervisor (PAGE 2) 10-16
Figure 10-22: Appraisal Status Report Selection 10-17
Figure 10-23: Appraisal Status Report 10-17
Figure 10-24: Download Employee Data – Excel Worksheet 10-18
Figure 10-25: Employee Roster Report Selection 10-19
Figure 10-26: Employee Roster Report 10-20
Figure 10-27: Post Cycle Activity Report Selection 10-21
Figure 10-28: Post Cycle Activity Report 10-21
Figure 10-29: Supervisor Roster by Employee Report Selection 10-22
Figure 10-30: Supervisor Roster by Employee Report 10-22
Figure 10-31: Supervisor Roster by Supervisor Report Selection 10-23
Figure 10-32: Supervisor Roster by Supervisor Report 10-23
Figure 10-33: Zone A/CIP Report Selection 10-24
Figure 10-34: Zone A/CIP Report 10-24

LIST OF TABLES

Table 1-1: CAS2NET User Guide Contents 1-1
Table 2-1: CAS2NET User Roles and Responsibilities 2-1

1. INTRODUCTION

This document describes the features and capabilities of the Contribution-based Compensation and Appraisal System Software (CAS2NET) for the Acquisition Workforce Demonstration Project (AcqDemo) Office of the United States Department of Defense (DOD).

1.1 Purpose

CAS2NET is an online reporting system of the Contribution-based Compensation and Appraisal System (CCAS), a results-based, competency-linked pay banding and performance-based pay system. The purpose of this document is to describe the features and capabilities of the CAS2NET and to define the role of CAS2NET in supporting the Acquisition Workforce Demonstration Project (AcqDemo).

1.2 Scope

CAS2NET supports planning, feedback, assessment and reward activities of the performance cycle. The Contribution Planning module encourages collaboration between employees and supervisors to refine performance objectives. Additional Feedback and Mid-Point Review modules promote continuous communication and performance improvement. The Annual Appraisal modules enable employees and supervisors to provide evaluations based on their respective viewpoints. The reward activities consist of the Paypool Panel review and reconciliation of the Level 1 Supervisors' evaluations and the generation of the employee salary increase, award and bonus.

The scope of this document includes the guidance for using the CAS2NET to record and review performance appraisals individually or collectively across different supervisory levels—and to assist Data Maintainers in their roles as CAS2Net data administrators.

1.3 Document Overview

This guide helps you get started with the CAS2NET and serves as a reference whenever you need assistance with a particular function. This guide includes a section for each CAS2NET user role providing guidance on how to use the system to execute their assigned responsibility in the performance appraisal workflow and/or paypool administration. This document contains the sections and appendices described in Table 1-1.

Table 1-1: CAS2NET User Guide Contents

Section/ Sub-Section	Name	Contents
1.0	Introduction	This section describes the purpose and scope of this document, and provides an overview of document content.
2.0	CAS2Net Overview	This section provides an overview of the Contribution-based Compensation and Appraisal System Software, CAS2NET User Roles and their responsibilities, who should use this guide, access, transfer, sharing, and ownership of appraisal records, and the different conventions that will be seen throughout the document.
3.0	CAS2Net Log-In and Log-Off	This section describes how the system users will access the system and what they will see upon successful log-in based on their assigned role(s).

Section/ Sub-Section	Name	Contents
4.0	Employee	This section describes the role of an AcqDemo employee and available CAS2Net functionality.
5.0	Level 1 Supervisor	This section focuses on the Level 1 Supervisor's use of the system and details how to use CAS2NET to enter and edit performance factors and appraisals. CAS2NET supports the Level 1 Supervisor's ability to create and modify performance factors for each employee they supervise.
6.0	Level 2 Supervisor	This section provides guidance for the Level 2 Supervisor on how to use CAS2NET to review the rating of a selected employee for completeness of forms and accurate application.
7.0	Paypool Manager	This section provides guidance for the Paypool Manager on how to use CAS2NET to monitor the progress of appraisals across the paypool and review the rating of a selected employee for completeness. It includes instructions for changing role to assume an assigned CAS2NET role to execute their designated responsibility.
8.0	Data Maintainer	This section provides guidance for the Data Maintainer on how to use CAS2NET to download data to CWB, upload data from CWB, make supervisory assignments for employees, the review of the performance ratings of employees for fair consideration. It includes instructions for changing role to assume an assigned CAS2NET role to execute their designated responsibility.
9.0	Superuser	This section provides guidance for the Superuser to modify and add non-demo employee record in the CAS2NET. It includes instructions for changing role to assume an assigned CAS2NET role to execute their designated responsibility.
10.0	Reports	This section overviews the reports available to CAS2Net users.

2. CAS2NET OVERVIEW

This section provides an overview of CAS2NET, user roles, and their responsibilities.

2.1 CAS2NET Overview

CAS2NET is an online reporting system of the Contribution-based Compensation and Appraisal System (CCAS), a results-based, competency-linked pay banding and performance-based pay system. CAS2NET represents evolution of tools for the Acquisition Workforce Demonstration Project (AcqDemo) Office of the United States Department of Defense (DOD), to augment the performance appraisal management process. CAS2NET supports planning, feedback, assessment and reward activities of the performance cycle, while the Contribution Planning module encourages collaboration between employees and supervisors to refine performance objectives. Additional Feedback and Mid-Point Review modules will promote continuous communication and performance improvement, as the Annual Appraisal modules enable employees and supervisors to provide evaluations based on their respective viewpoints. The reward activities consist of the Paypool Panel review and reconciliation of the Level 1 Supervisors' evaluations and the generation of the employee salary increase, award and bonus.

2.2 Who Should Use This Guide?

The CAS2NET User Guide is for Level 1 Supervisors, Level 2 Supervisors, Sub-Panel Managers, Paypool Managers, and the Data Maintainer who are assigned these roles in the CAS2NET to perform their respective responsibilities listed in Table 2-1.

Table 2-1: CAS2NET User Roles and Responsibilities

CAS2NET User Role	Responsibilities
Employee	An individual who participates in the AcqDemo paypool processes as a "demo" employee. Responsible for: ▪ Collaborating with the Level 1 Supervisor to set performance standards. ▪ Providing self-assessments for Mid-Year Review and Annual Appraisal.
Level 1 Supervisor	An AcqDemo employee who is the immediate supervisor of one or more "demo" employees. Responsible for: ▪ Setting performance standards, and communicating performance expectations. ▪ Monitoring and providing performance feedback. ▪ Appraising performance. ▪ Taking action to recognize, reward, or correct performance.
Level 2 Supervisor	A higher level AcqDemo official who reviews the Level 1 Supervisor's determination of an employee's performance. Responsible for: ▪ Reviewing employee ratings to ensure that the same standards for evaluating performance are applied by reporting supervisors.
Paypool Manager	The highest ranking official in the paypool responsible for: ▪ Managing the performance pay increases based on share distribution, and performance awards for their respective paypool. ▪ Convening and oversight of the Paypool Panel. ▪ Ensuring judicious use of paypool funds balanced against budget policies and based on employee performance. ▪ Enforcing paypool procedures and policies; and ensuring that Level 1 Supervisors comply with timely issuance of mid-term reviews and closeout assessments.

CAS2NET User Role	Responsibilities
Superuser	The Superuser is responsible for: ▪ Overseeing the entire CAS2Net system to ensure supervisor assignments are correct ▪ Assist employees and supervisors with problems or issues concerning their CAS2Net role. ▪ Create and modify employee record in CAS2NET.
Data Maintainer	The Data Maintainer is responsible for: ▪ Tracking the progress of the performance evaluations across paypools. ▪ Analyze performance management data across paypools. ▪ Create and modify employee record in CAS2NET.

2.3 Access and Authorization

The user access to CAS2NET is authenticated by DOD's e-Authentication system upon log-in. Authorization to access CAS2NET functions is determined by the assigned user role (s) of the CAS2NET user. The navigation bar on the left side of the screen is customized based on assigned role (s) to an individual CAS2NET user. Thus a CAS2NET user who is a Level 1 Supervisor and a Level 2 Supervisor will see the options used by the assigned roles.

2.4 Ownership of Performance Appraisal and Review Workflow

Each employee is assigned to a paypool in the CAS2NET, and has assigned officials for each supervisory level (i.e. Level 1 Supervisor, Level 2 Supervisor, Sub-Panel Manager, and Paypool Manager.) The assignment of supervisors to employees is used by CAS2NET to control access to employee performance appraisal by assigned officials only. The Data Maintainers are assigned to paypools which gives them access to rating data of all employees within the paypool. Superusers have access to all employee records and can assume any CAS2NET User role to execute a CAS2NET function.

2.5 CAS2Net Conventions

CAS2Net implements common navigation conventions that are familiar to most website users.

- Movement among web pages is done by clicking on links. A link is the name of another web page – links are always underlined.
- Each web page has logical links to other related web pages. You can also use the "Back" button on your browser to return to the previous page.
- A browser window can display multiple web pages by placing each page within a frame. Clicking a link in a web page in one frame may cause a new page to be displayed in another frame, and sometimes links may display the new page in the same frame.
- Web pages often contain more information than can be displayed on your computer screen. In these cases, the page will have scroll bars along its right and/or bottom margins to give you access to the "hidden" information. Use the scroll bars to be sure you completely fill in all data entry screens.
- With Netscape, you can re-size the text in a page to adjust how much is visible at one time. To do this, first click anywhere in the page to set the "focus". Then hold down the Ctrl key and press [to make the text smaller or] to make the text larger.

- Movement from page to page can be very quick or very slow, depending on the amount of traffic and the length and speed of the path the traffic must travel. It is possible for information packets to get "lost" in transmission, so if you click on a link and nothing happens for several minutes, click the "Stop" button on your browser and try the link again.
- If you click on a link and there is a long delay, you might get an error message something like "the file contains no data". This could be due to your connection being so slow that your browser "times out". If this happens, try the link again. If the problem persists contact AcqDemo Support Offices.

3. USER AUTHENTICATION AND AUTHORIZATION

3.1 User Login and Role Based Menu

This section describes how the system users will access the system and what they will see upon successful log-in based on their assigned role(s).

To access the URL: https://acqdemoii.army.mil

Note: CAS2Net is hosted on an Army server but services all DoD AcqDemo participants. Contact your paypool data maintainer if you can't access the site.

1. When the Usage Policy screen is shown, click "I Agree" button to continue.

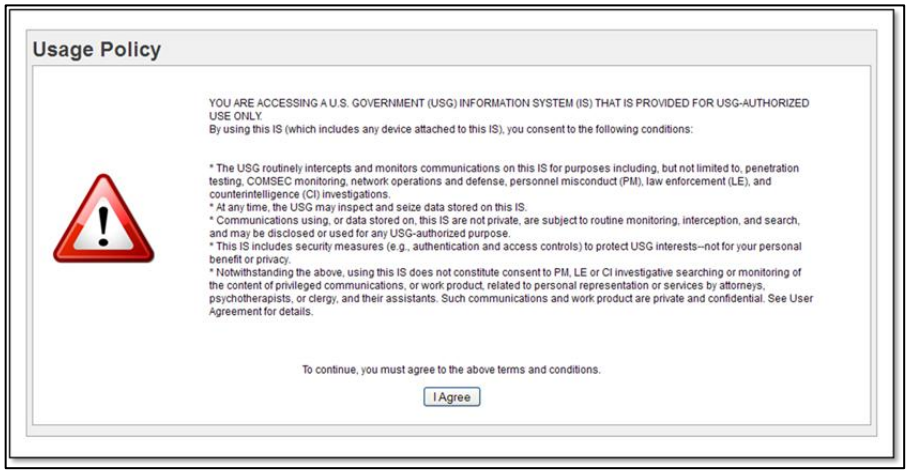


Figure 3-1: Usage Policy Screen

2. Next, click the "CAC Login" button to sign in.

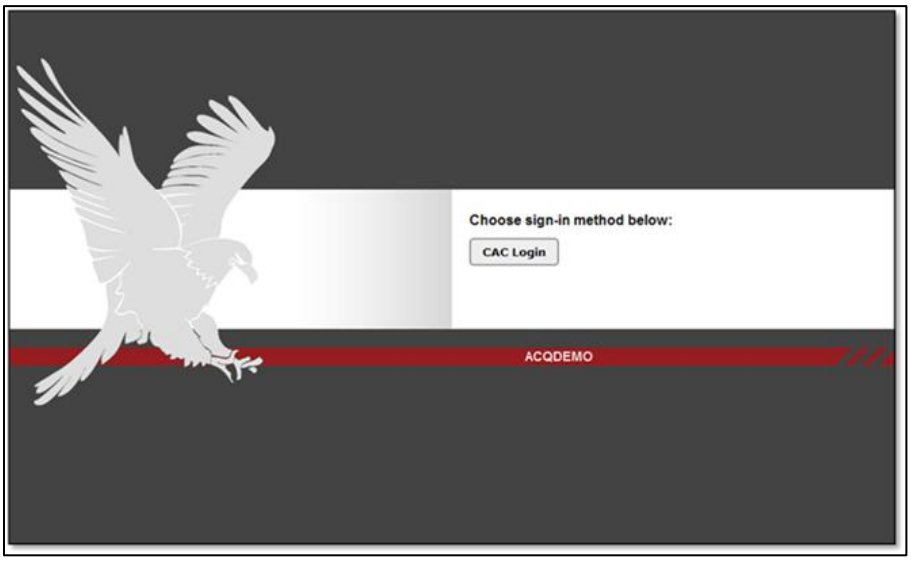


Figure 3-2: CAC Logo Screen

3. Select one of your installed CAC digital certificates and click the OK button.

Figure 3-3: Digital Certification Selection Screen

If prompted, enter your CAC PIN.

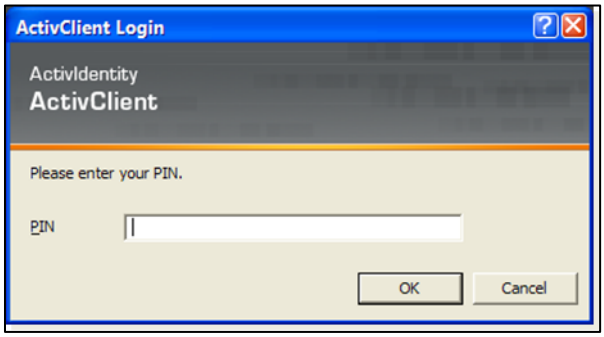


Figure 3-4: CAC Pin Entry Screen

4. CAS2Net successfully logs the user in and displays the "Welcome" greeting.

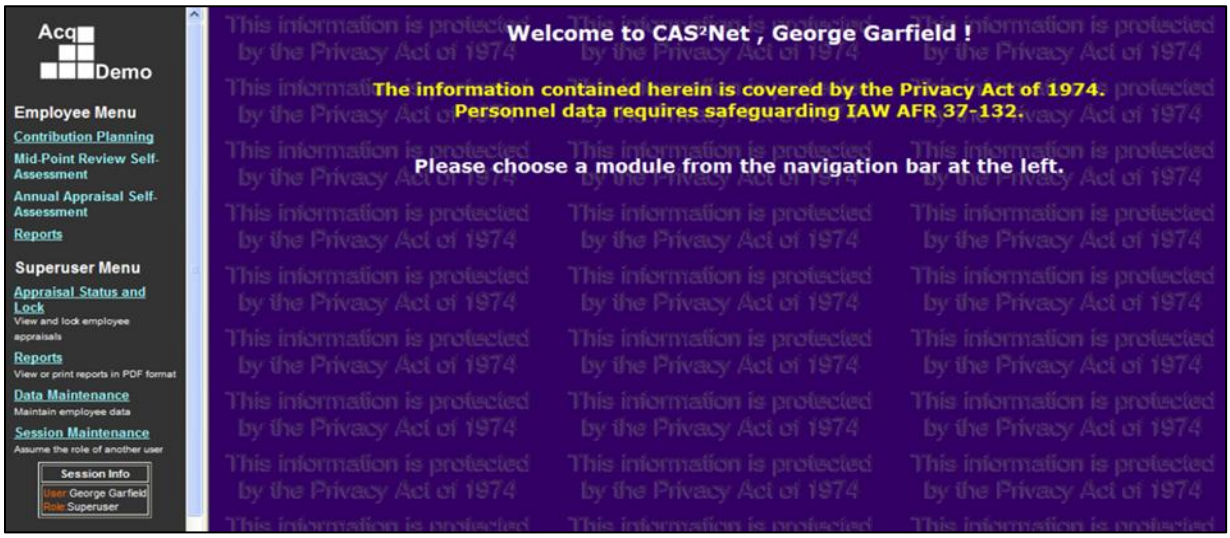


Figure 3-5: CAS2Net Welcome Screen

5. If your assigned role is Employee, then the navigation bar displays the **Employee Menu** with the following options: **Contribution Planning**, **Mid-Point Review Self-Assessment**, **Annual Appraisal Self-Assessment**, **Reports**, **Password Maintenance**, and **Logout**.

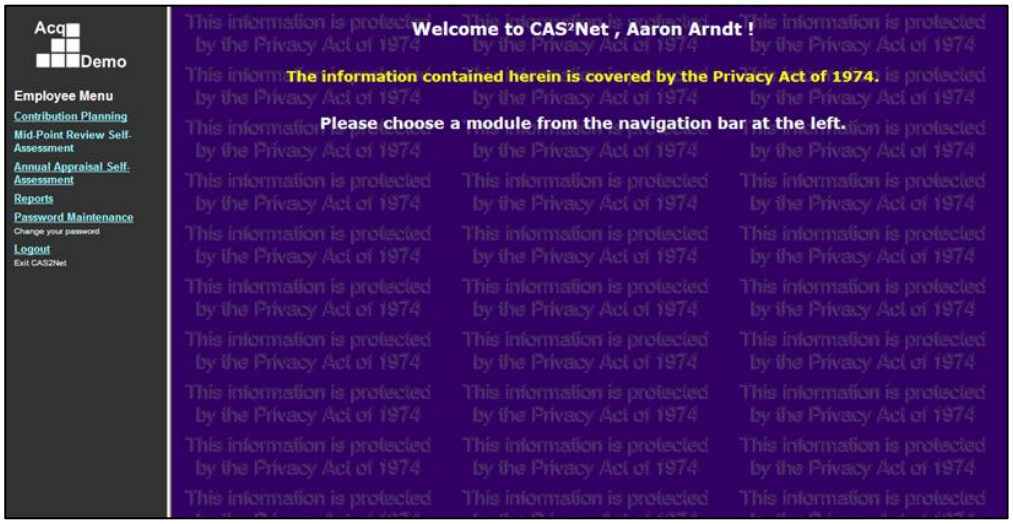


Figure 3-6: Employee Log In

6. If your assigned role is Level 1 Supervisor, then the navigation bar displays the **Supervisor 1 Menu** with the following options: **Contribution Planning**, **Additional Feedback**, **Mid-Point Review**, **Annual Appraisal**, **Reports**, **Password Maintenance**, and **Logout**.

   A Level 1 Supervisor who participates in paypool processes as a "demo" employee will also see the **Employee Menu** and sub-menu items at the top of the navigation bar.

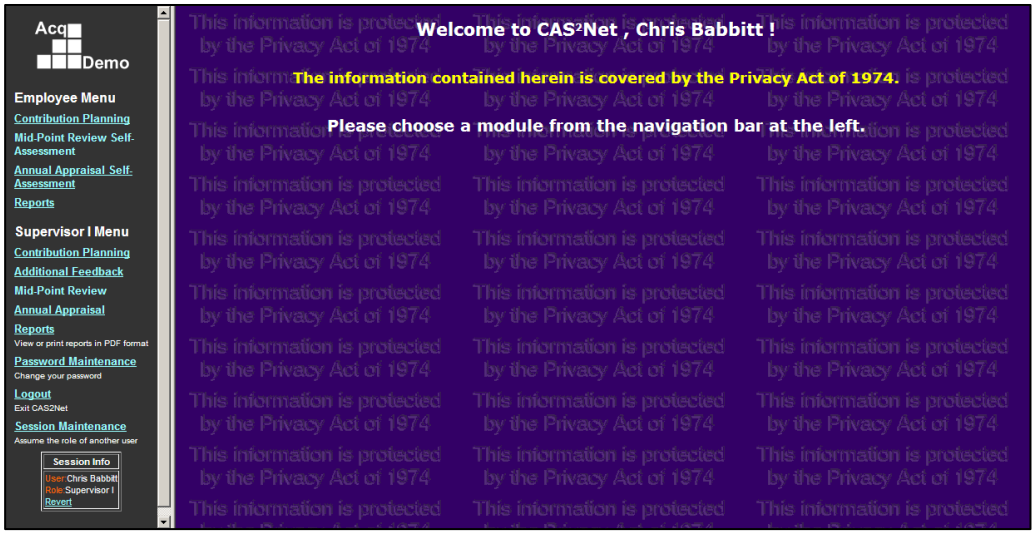


Figure 3-7: Level 1 Supervisor Log In

7. If your assigned role is Level 2 Supervisor, then the navigation bar displays the **Sub-Panel Manager Menu** with the following options: **Sub-Panel Meeting**, **Appraisal Status**, **Reports**, **Password Maintenance**, and **Logout**.

   A Level 2 Supervisor who participates in paypool processes as a "demo" employee will also see the **Employee Menu** and sub-menu items at the top of the navigation bar.

When the Level 2 Supervisor is responsible for assessing the performance of direct report "demo" employees, the supervisor assessment menu items are included in the Sub-Panel Manager Menu: **Contribution Planning**, **Additional Feedback**, **Mid-Point Review**,and **Annual Appraisal**.

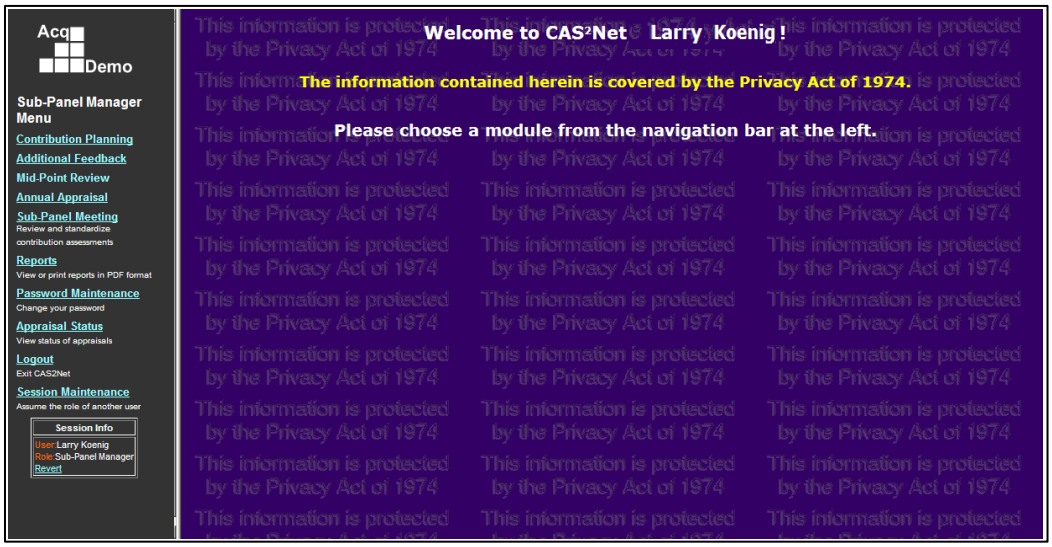


Figure 3-8: Level 2 Supervisor Log In

8. If your assigned role is Paypool Manager, then the navigation bar displays the **Paypool Manager Menu** with the following options: **Sub-Panel Meeting**, **Appraisal Status**, **Reports**, **Password Maintenance**, and **Logout**.

   A Paypool Manager who participates in paypool processes as a "demo" employee will also see the **Employee Menu** and sub-menu items at the top of the navigation bar.

   When the Paypool Manager is responsible for assessing the performance of direct report "demo" employees, the supervisor assessment menu items are included in the Paypool Manager Menu: **Contribution Planning**, **Additional Feedback**, **Mid-Point Review**,and **Annual Appraisal**.

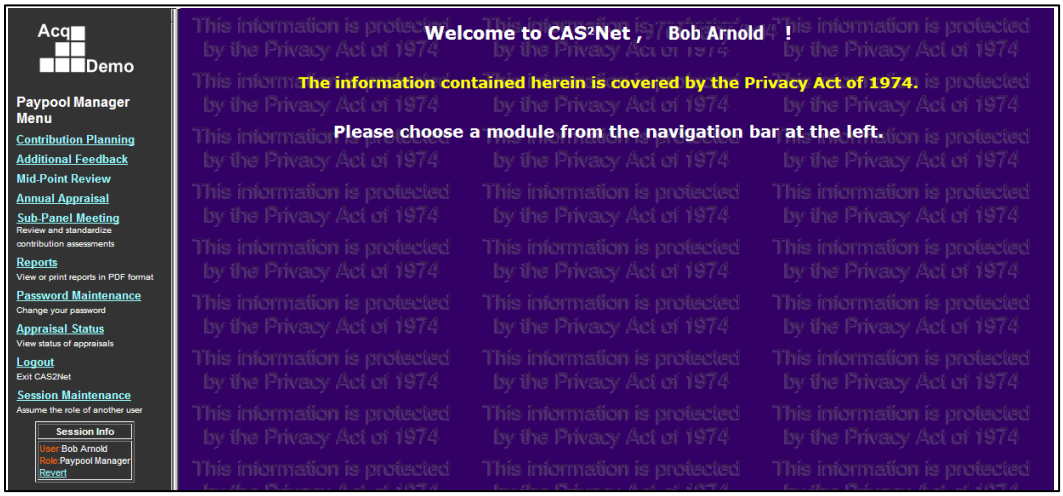


Figure 3-9: Paypool Manager Log In

9. If your assigned role is Data Maintainer, then the navigation bar displays the **Data Maintainer Menu** with the following options: **Appraisal Status and Lock**, **Data Maintenance**, **Offline Interface**, **Paypool Notices**, **Reports**, **Password Maintenance**, and **Logout**.

   A Data Maintainer who participates in paypool processes as a "demo" employee will also see the **Employee Menu** and sub-menu items at the top of the navigation bar.

   When the Data Maintainer is responsible for assessing the performance of direct report "demo" employees, the supervisor assessment menu items are included in the Data Maintainer Menu: **Contribution Planning**, **Additional Feedback**, **Mid-Point Review**,and **Annual Appraisal**.

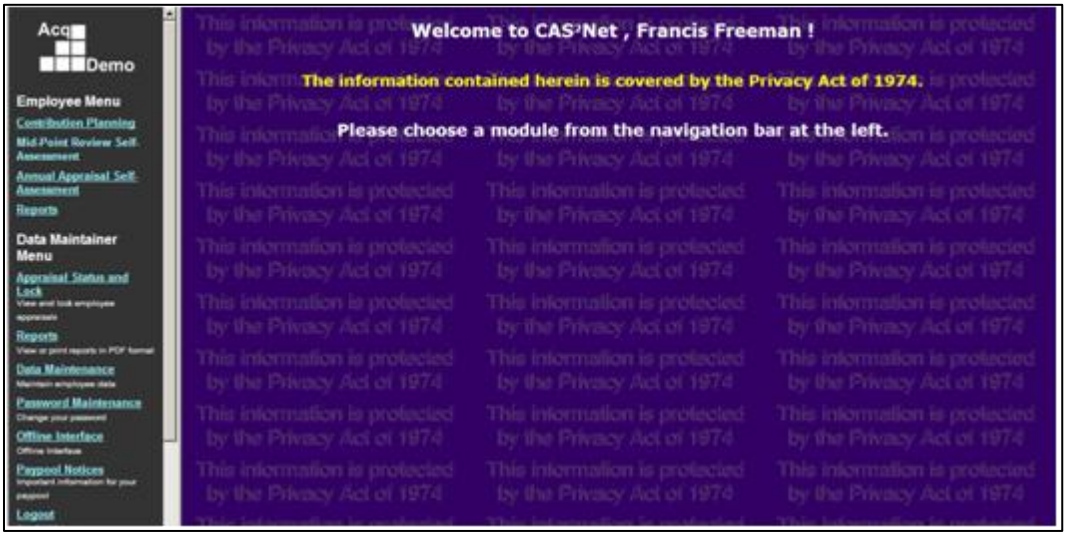


Figure 3-10: Data Maintainer Log In

10. If your assigned role is Superuser, then the navigation bar displays the **Superuser Menu** with the following options: **Appraisal Status and Lock**, **Data Maintenance**, **Session Maintenance**, **Offline Interface**, **Paypool Notices**, **Reports**, **Password Maintenance**, and **Logout**.

    A Superuser who participates in paypool processes as a "demo" employee will also see the **Employee Menu** and sub-menu items at the top of the navigation bar.

    When the Superuser is responsible for assessing the performance of direct report "demo" employees, the supervisor assessment menu items are included in the Superuser Menu: **Contribution Planning**, **Additional Feedback**, **Mid-Point Review**,and **Annual Appraisal**.

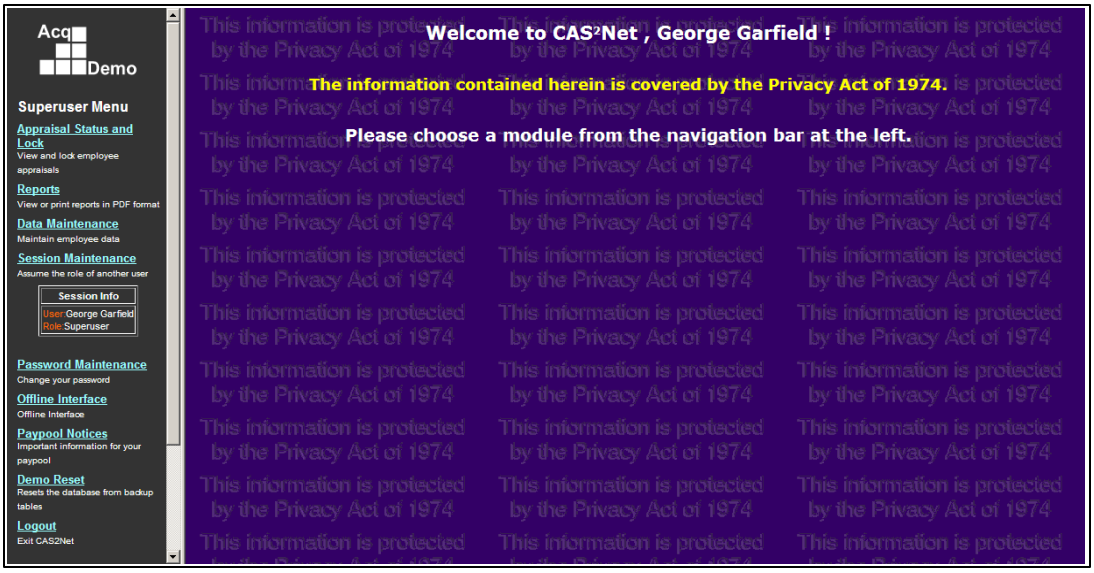


Figure 3-11: Superuser Log In

11. The CAS2Net navigation bar is customized for each user and provides access to functions that are explicitly or implicitly by your role and responsibilities. All "demo" employees—regardless of role—will see the **Employee Menu** at the top of the navigation bar.

    Also, the navigation bar automatically includes supervisor assessment menu items for managers or administrators with direct report "demo" employee assignments.

    The example below illustrates the CAS2Net navigation bar customized for a Level 2 Supervisor who is himself a "demo" employee and who has supervisor assessment responsibility for direct reports.

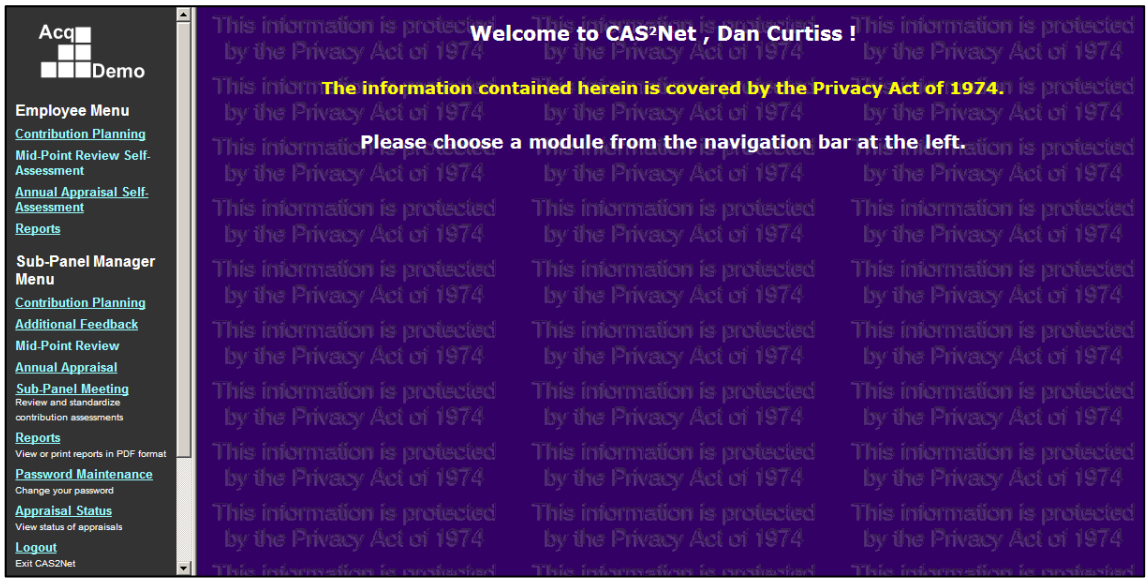


Figure 3-12: "Multiple Roles" Log In

3.2 Logout

This section describes how the system users log out the system and what they will see upon successful log-out.

1. Click "Logout – Exit CAS2Net" on the bottom of the navigation bar.
2. CAS2Net displays AcqDemo logo screen with messages:
   - "You have logged out of CAS2Net!"
   - "Please close your browser to erase all login information."

Figure 3-13: Log Out Message

3. Close the browser, CAS2Net will wipe out all login information of the logged on person.

3.3 Password Maintenance

This section is only used in training versions of CAS2Net. See Section 3.1 for instructions on using a CAC to access production CAS2Net.

This section describes how the system users change and renew the login password.

1. Click "Password Maintenance – Change your password" from the navigation bar.
2. CAS2Net displays "Password Maintenance" page:

- Name and User Id of the logged on supervisor.
- Password change criteria:
  - Be at least 15 characters long.
  - Contain at least two upper case letters, two lower case letters, two digits, and two special characters.
  - Special characters list: \ ~ ! # $ % ^ & * ( ) _ - + = } {] [| \ : ; " ' < > ? , .
  - Cannot begin with a number.
  - Cannot contain the following special characters: @ /
  - Be different from the User Name.
  - Be different at least 3 characters from the current password.
- "Enter current password" textbox.
- "Enter new password" textbox.
- "Re-enter new password" textbox.

Figure 3-14: Password Maintenance Screen

3. Enter current password.
4. Enter new password.
5. Re-enter new password.
6. Click "Submit" button.
7. CAS2Net displays message "Success! Password changed successfully." and prompts to return to the Main Menu.

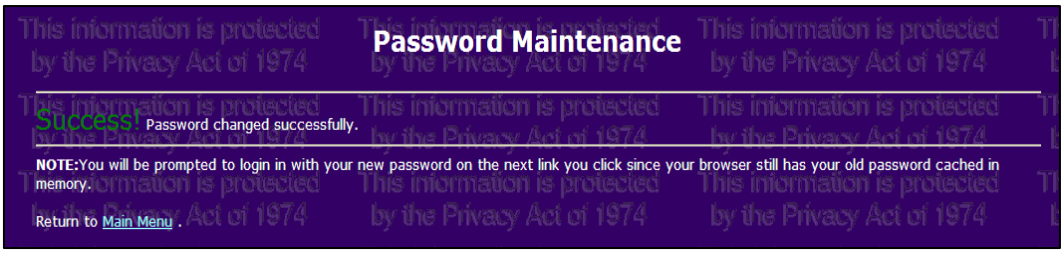


Figure 3-15: Password Maintenance – Success!

Note: CAS2Net will display a "Failure!" message if:

- *The old password is mistyped.*
- *The re-enter password does not match the new password.*
- *The new password does not meet the criteria.*

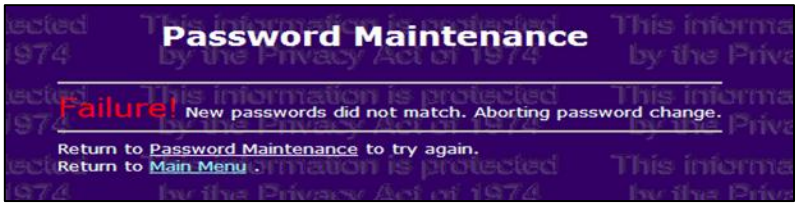


Figure 3-16: Password Maintenance – Failure!

4. EMPLOYEE

This section describes the employee role and how to use CAS2Net to participate in the assessment process. CAS2Net supports the employee's ability to create and modify Contribution Planning criteria and objectives and provide a personal Self-Assessment for Mid-Point Review and Annual Appraisal.

The Employee will have the following options appear in the navigation bar: **Contribution Planning**, **Mid-Point Review Self-Assessment**, **Annual Appraisal Self-Assessment**, **Reports**, **Password Maintenance** and **Logout**.

- The **Contribution Planning** option allows the employee to collaborate with his supervisor to create or modify objectives for the current performance cycle.
- **Mid-Point Review Self-Assessment** enables the employee to document his own evaluation of his performance.
- The **Annual Appraisal Self-Assessment** allows the employee to evaluate his achievements with respect to each AcqDemo performance factor.
- The **Reports** option provides the capability to generate reports for each of the features above as well as Additional Feedback provided by the Level 1 Supervisor.

4.1 Contribution Planning

Click "Contribution Planning" from the navigation bar. CAS2Net refreshes the screen to display the "Contribution Planning" screen.

After discussion with their supervisor, employees can initiate the Contribution Planning process if the there is no current plan by entering text and clicking on the Save button. This creates a draft plan that both employee and supervisor can view and edit.

The employee may check the "Release to Supervisor" checkbox and click "Save" to inform the supervisor that your input is complete. The "Release to Supervisor" checkbox is for information only. As long as status remains "In Progress", the employee may later clear the "Release to Supervisor" checkbox and "Save" to let the supervisor know that employee input is incomplete.

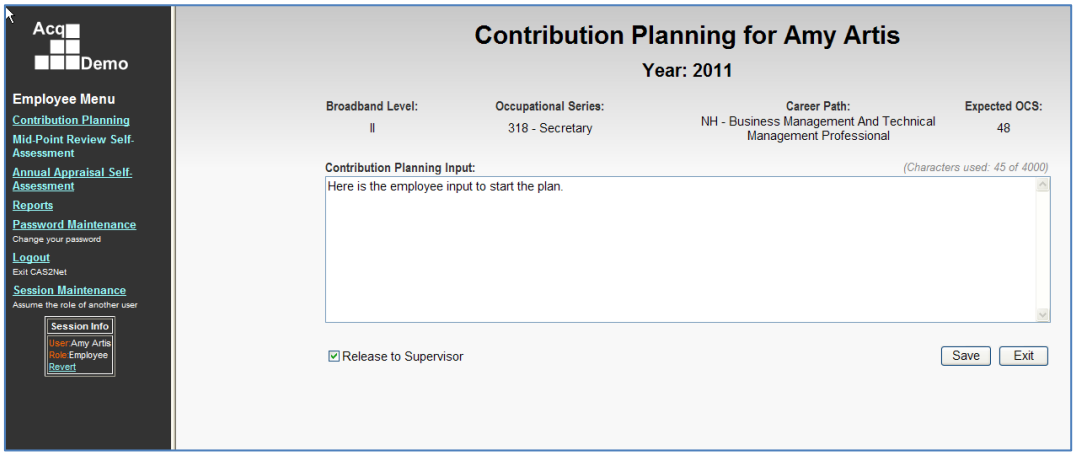


Figure 4-1: Employee Contribution Planning Web Form

Once the supervisor finalizes the plan and submits it, no further changes are permitted—with two exceptions:

1) If the supervisor performs the Contribution Planning "Modify" feature, then CAS2Net generates a new working copy of Contribution Planning and accepts updates both the supervisor or employee.
2) If "Release to Supervisor" is unchecked when Contribution Planning is finalized, then CAS2Net provides a "Release" button on the employee Contribution Planning web page to allow the employee to update the "Release to Supervisor" status.

"RELEASE" CONTRIBUTION PLANNING

Whenever Contribution Planning is in a "submitted" state or Annual Appraisal evaluations have begun, the employee will have read only access to the Contribution Plan content.

In cases where the "Release to Supervisor" remains unchecked, CAS2Net provides a "Release" button. The employee may click "Release" to update the employee input status.

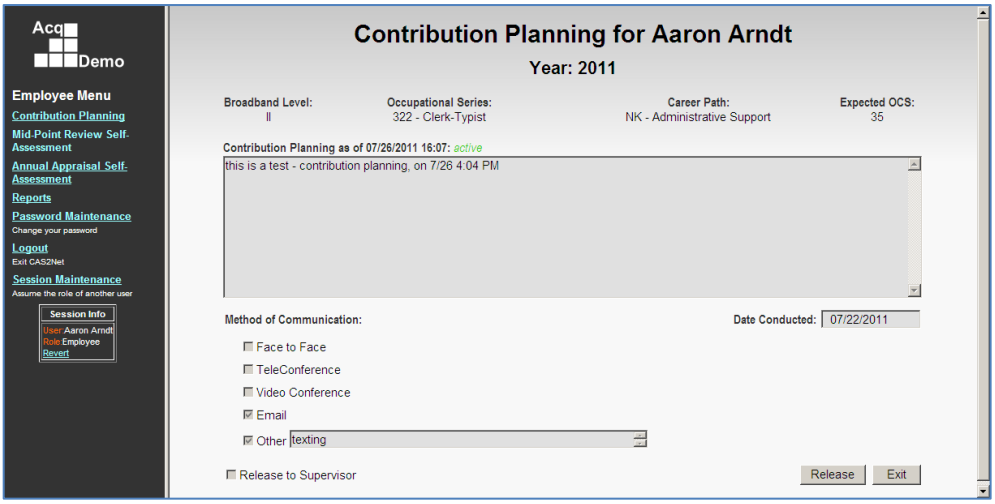


Figure 4-2: "Release" Employee Contribution Planning

NEXT CYCLE YEAR CONTRIBUTION PLANNING

CAS2Net is focused on annual appraisals and paypool operations at the same time that new Contribution Planning is being documented for the next performance year. During this business cycle overlap, CAS2Net allows employees to choose between the previous and next cycle years.

When the current period of performance year is different from the active appraisal cycle year, then CAS2Net displays the Contribution Planning "Year" as a dropdown list with both years as choices.

The "Year" dropdown is displayed on each Contribution Planning web page with the current period of performance year selected by default.

Select the previous year from the "Year" dropdown to switch to the active appraisal cycle year.

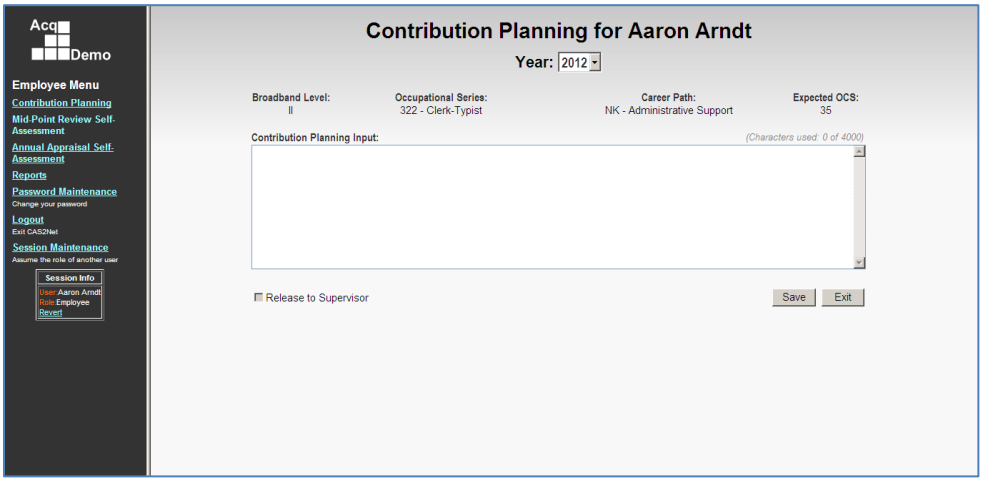


Figure 4-3: "Next Cycle Year" Employee Contribution Planning Web Form

The capability to create "next cycle year" Contribution Planning as well as "active appraisal cycle" Contribution Planning makes it imperative that employees correctly select the appropriate year from the dropdown provided at the top center of the Contribution Planning screen in creating a plan for either year.

4.2 Mid-Point Review Self-Assessment

This selection is not yet unavailable. The navigation menu item is presently inactive.

4.3 Annual Appraisal Self-Assessment

Click "Annual Appraisal Self-Assessment" from the navigation bar. CAS2Net refreshes the screen to display the "Annual Appraisal Self-Assessment" screen.

The "Annual Appraisal Self-Assessment" consists of two main parts:

- "Contribution Planning" which is reviewed, modified, and submitted by the supervisor and shown as read-only.
- "Employee Self-Assessment": where employee enters his achievements with respect to each AcqDemo performance factor.

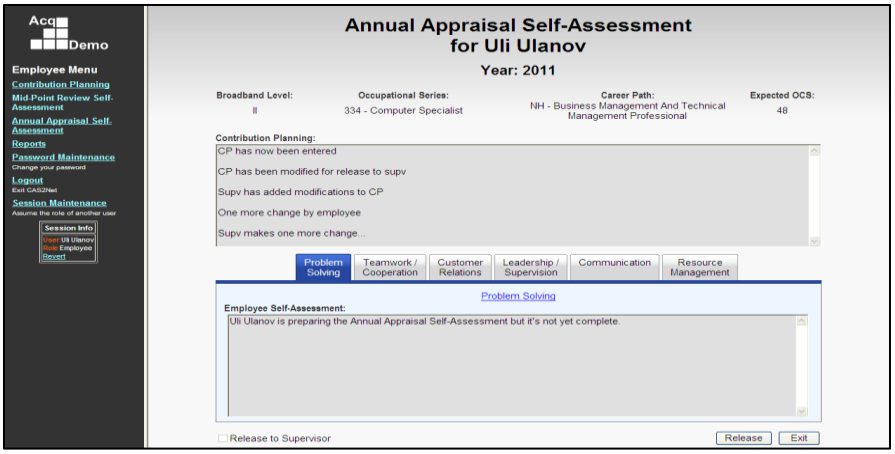


Figure 4-4: Annual Appraisal Self-Assessment Web Form

Employee clicks on each performance factor tab, and types or copies and pastes from other sources *(example: MS Word, note that some special characters in Word do not work in CAS2Net)* his own evaluation of his performance for the appraisal year to the "Employee Self-Assessment" textbox. The "hotlink" below the tabs is linked to the descriptor and discriminators of the performance factors.

Employee can modify his self-assessment over and over, and save it by clicking the "Save" button. When he satisfies with his evaluation, he can check the checkbox "Release to Supervisor", by then the rating supervisor would know that he has the final version the Employee Self-Assessment.

Note: "Self-Assessment" status is information only; CAS2Net does not enforce any business rules regarding the employee's "Release to Supervisor" state.

4.4 Reports

When "Reports" is clicked in the Employee Menu, CAS2Net presents the "Employee Reports" menu which includes the following:

- Contribution Planning
- Mid-Point Review Self-Assessment (not yet available)
- Additional Feedback
- Annual Appraisal Self-Assessment

When the report is available for printing, CAS2Net displays the report name as a "hot link". When the report is unavailable for printing, CAS2Net shows the report name as simple text with the caption "(Not Provided)" or "(Not Released)" appended.

When the "hot link" report name is clicked, CAS2Net runs the selected report and opens a new window to display the generated Adobe PDF file.

Reference section "10.1 Employee Reports" for sample employee reports.

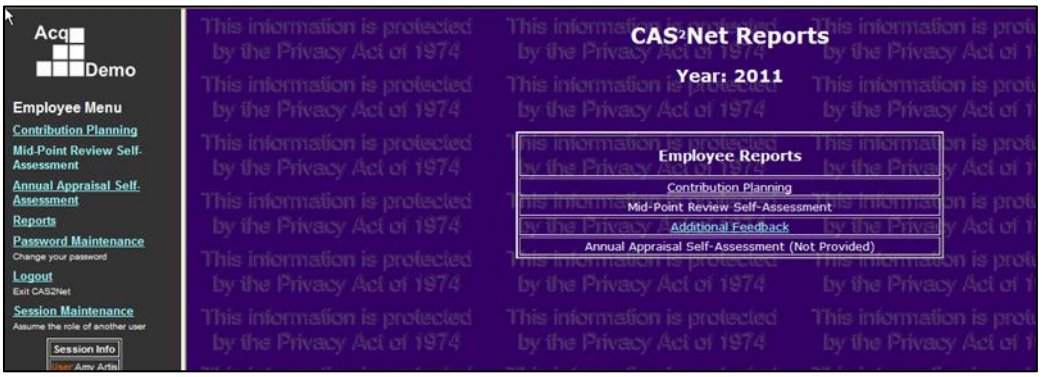
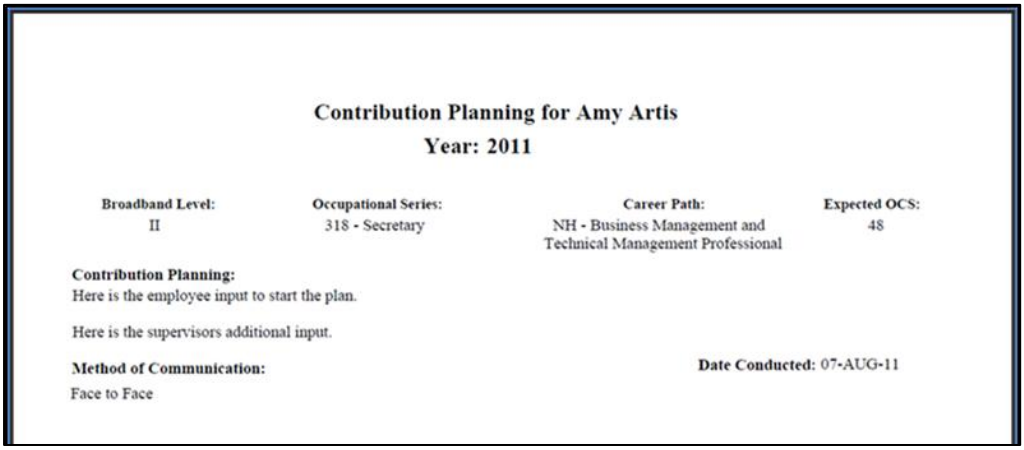


Figure 4-5: Employee Reports Menu



Contribution Planning for Amy Artis

Year: 2011

Broadband Level:	Occupational Series:	Career Path:	Expected OCS:
II	318 - Secretary	NH - Business Management and Technical Management Professional	48

Contribution Planning:
Here is the employee input to start the plan.

Here is the supervisors additional input.

Method of Communication:
Face to Face

Date Conducted: 07-AUG-11

Figure 4-6: Sample Employee Report

5. LEVEL 1 SUPERVISOR

This section focuses on the Level 1 Supervisor's use of the system and details how to use CAS2Net to rate and enter/edit performance factors in the Annual Appraisal. CAS2Net supports the Level 1 Supervisor's ability to create and modify performance ratings for each employee they supervise, which includes entering "Categorical" and "Numerical" ratings and recording supporting narrative comments.

If the Level 1 Supervisor is also a "demo" employee, then the following "Employee Menu" options will appear in the upper portion of the navigation bar: **Contribution Planning**, **Mid-Point Review Self-Assessment**, **Annual Appraisal Self-Assessment**, and **Reports**.

Refer to Section "4. Employee" for information relating to the Employee Menu features.

The Level 1 Supervisor will have the following options appear in the navigation bar: **Contribution Planning**, **Additional Feedback**, **Mid-Point Review**, **Annual Appraisal**, **Reports**, **Password Maintenance** and **Logout**.

- The **Contribution Planning** option allows the supervisor to collaborate with employee to create or modify objectives for the current performance cycle.
- **Additional Feedback** allows the supervisor to provide helpful guidance throughout the performance cycle.
- **Mid-Point Review** enables the supervisor to assess employee performance at the mid-point of the annual the performance cycle. This feature has not been deployed.
- The **Annual Appraisal** allows the supervisor to document each employee's performance ratings and assessments with respect to the AcqDemo performance factor.
- The **Reports** option provides the capability to generate reports for each of the features above as well as Additional Feedback provided by the Level 1 Supervisor.

5.1 Contribution Planning

Contribution Planning is a collaborative effort shared by the supervisor and the employee. Either party may initiate Contribution Planning if none exists. Either may update while status remains "in progress". The supervisor is responsible for completing the process by entering the date and method of communication and clicking "Submit". If later modifications are necessary, it is the supervisor's responsibility to reopen Contribution Planning via the "Modify" feature.

It is important to note that Contribution Planning must be "submitted" to be accessible by other CAS2Net processes--such as Additional Feedback and Annual Appraisal. An entry that is "In Progress" is not visible outside Contribution Planning web form.

CONTRIBUTION PLANNING STATUS

When "Contribution Planning" is selected in the Supervisor 1 Menu, the "Contribution Planning Status" web page is displayed.

CAS2Net lists employees assigned to the supervisor along with Contribution Planning status columns:

- **Employee**
- **Employee Input** status—values include:
  - Green 'checkmark' = Employee has checked "Release to Supervisor"
  - Red 'X' = Employee has saved input without checking "Release to Supervisor"
  - (blank) = Employee has NOT saved Contribution Planning input
- **Contribution Planning Status**—values include:
  - Green 'checkmark' = 'Complete'

- Red 'X' = 'Incomplete' (In Progress)
- (blank) = Not Provided

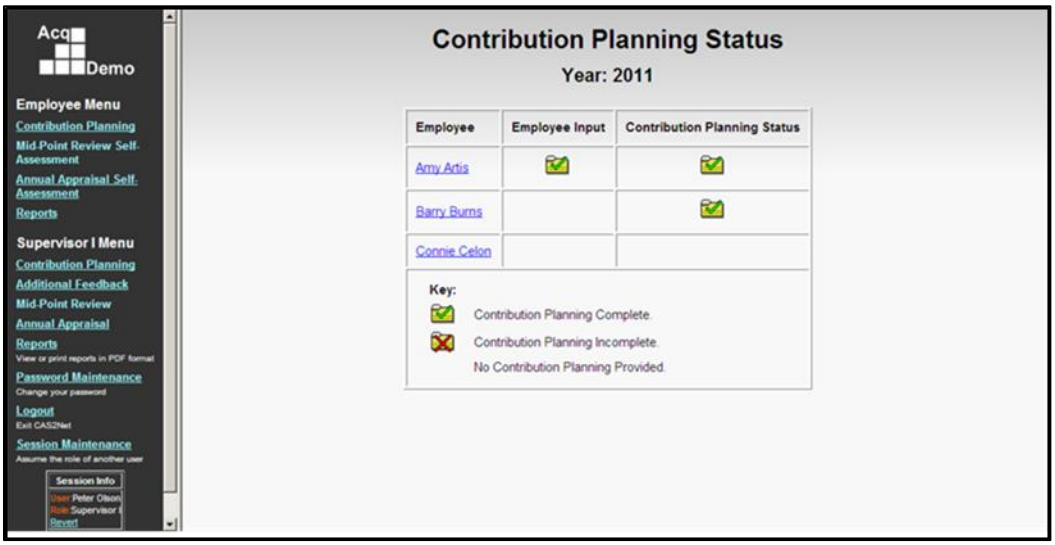


Figure 5-1: Supervisor Contribution Planning Status

CONTRIBUTION PLANNING WEB FORM

On the Contribution Planning Status page, click an employee name to open the Contribution Planning web form.

CAS2Net populates the screen with last saved information for selected employee (if any).

The supervisor edits and enters text as needed.

Click "Save" to save changes and refresh the web page.

Click "Exit" to return to the Contribution Planning Status web page without saving changes.

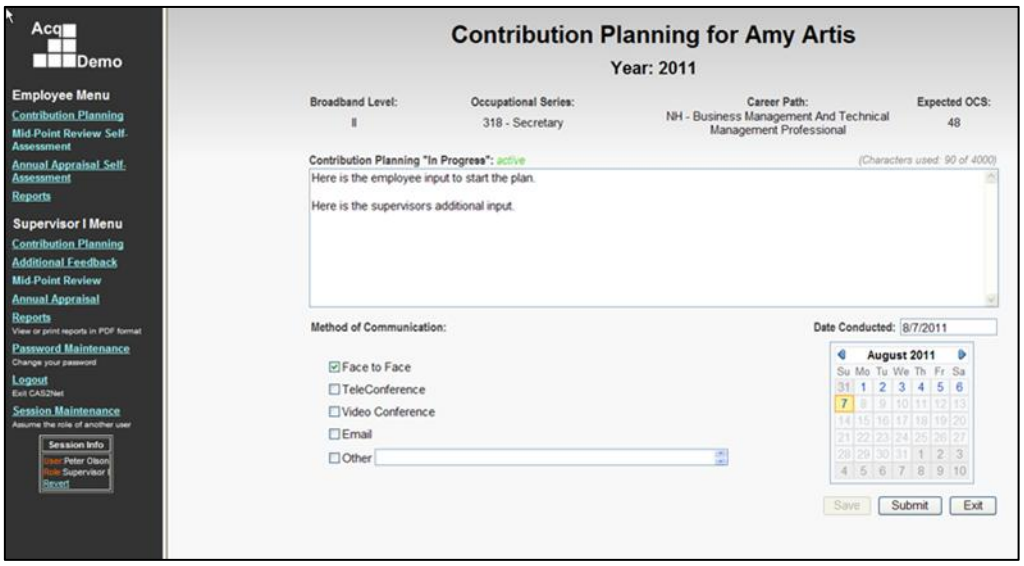


Figure 5-2: Supervisor Contribution Planning Web Form

After the supervisor meets with the employee to review the "Contribution Planning" content, the supervisor selects the date and method of communication and clicks "Submit" indicating the "Contribution Planning" process is complete.

"Submit" saves changes and returns to the Contribution Planning Status page.

Note: The "Submit" button is disabled until the date conducted is selected. Once the date is selected, the "Submit" button becomes active.

MODIFY CONTRIBUTION PLANNING

If later modifications to a plan are needed, click on the Contribution Planning from the Supervisor Menu and select the name of the employee to open the Contribution Planning web form for selected employee.

The "Contribution Planning" input text box is pre-filled with last saved or submitted content.

Hot links provide read-only access to previously submitted "Contribution Planning" content.

The supervisor may click the "Modify" button to initiate modifications to Contribution Planning for this employee. CAS2Net reopens the Contribution Planning input for editing pre-filled with the original content. Note that the "Employee Input" status is unchanged by the "Modify" request.

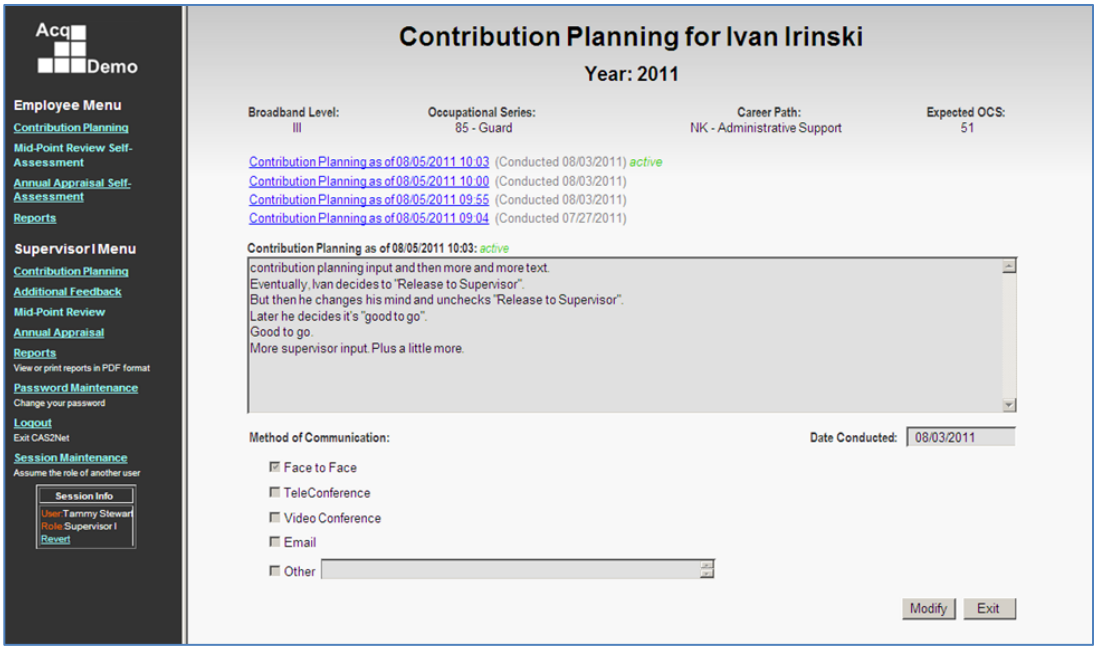


Figure 5-3: "Modify" Contribution Planning

Note. The caption "active" appears next to the last saved Contribution Planning entry label or "hot link" to highlight the version that is current.

Change text as necessary and click "Save". At this point, this new instance of Contribution Planning is added to the CAS2Net database which is again editable by either the supervisor or the employee.

When complete and reviewed with the employee, select method of date and communication and click "Submit".

NEXT CYCLE YEAR CONTRIBUTION PLANNING

CAS2Net is focused on annual appraisals and paypool operations at the same time that new Contribution Planning is being documented for the next performance year. During this business cycle overlap, CAS2Net allows supervisors to choose between the previous and next cycle years.

When the current period of performance year is different from the active appraisal cycle year, then CAS2Net displays the Contribution Planning "Year" as a dropdown list with both years as choices.

The "Year" dropdown is displayed on each Contribution Planning web page with the current period of performance year selected by default.

Select the previous year from the "Year" dropdown to switch to the active appraisal cycle year.

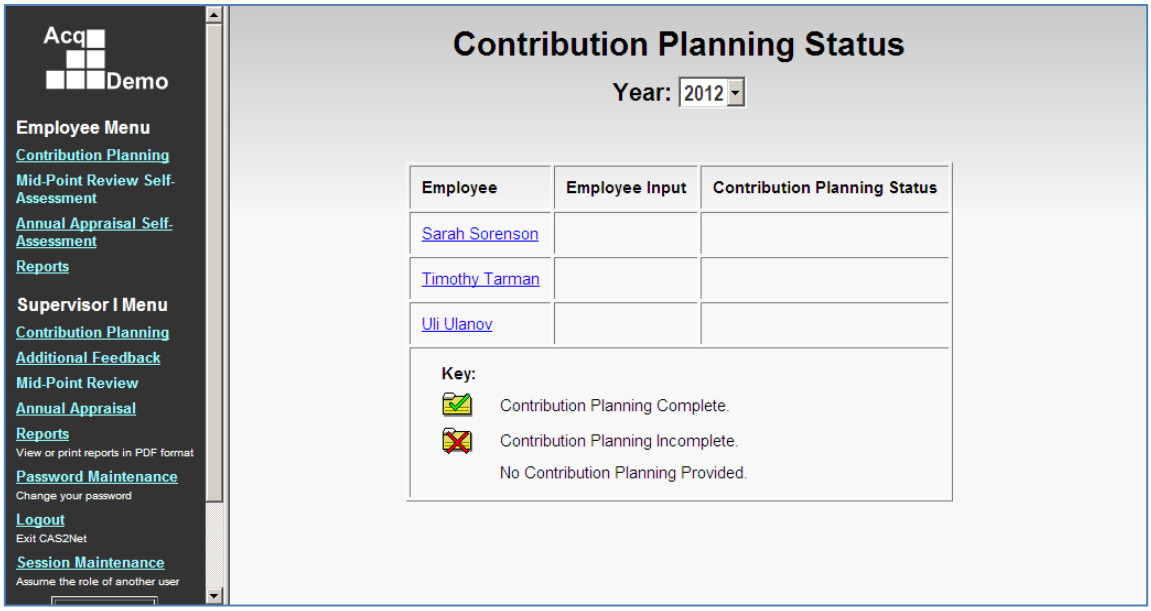


Figure 5-4: "Next Cycle Year" Contribution Planning Status

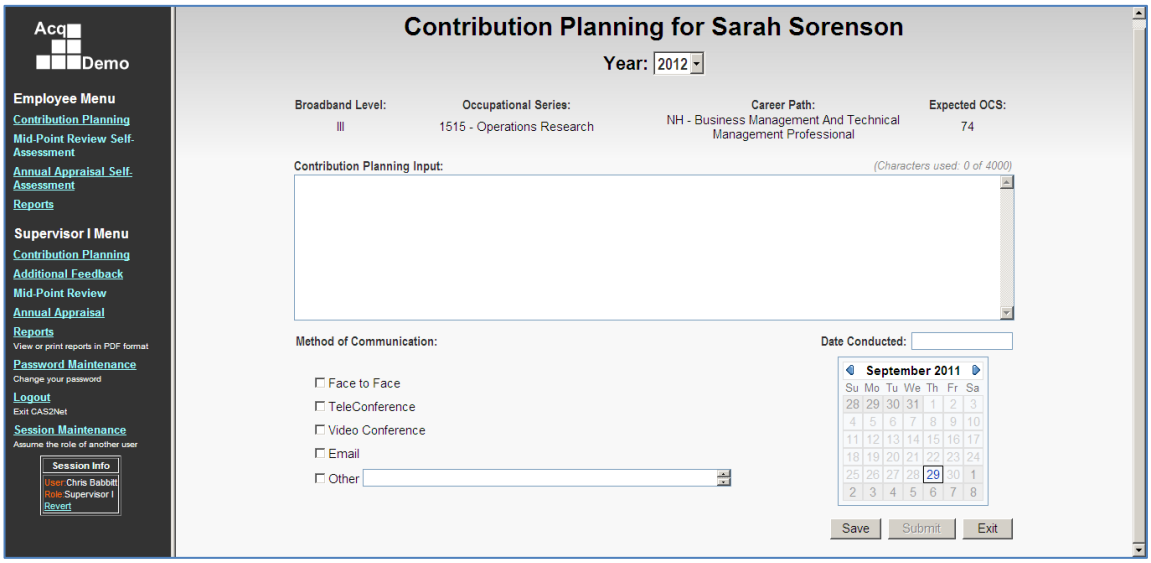


Figure 5-5: "Next Cycle Year" Supervisor Contribution Planning Web Form

The capability to create "next cycle year" Contribution Planning as well as "active appraisal cycle" Contribution Planning makes it imperative that supervisors correctly select the appropriate year from the dropdown provided at the top center of the Contribution Planning screen in creating a plan for either year.

5.2 Additional Feedback

Additional Feedback may be created by the supervisor at any time throughout the period of performance to provide guidance and feedback to an employee. The web page is only visible to the Level 1 Supervisor but the employee can print the content when and if the supervisor has checked the "Release to Employee" checkbox or "submitted" the Additional Feedback.

The supervisor can create multiple instances of Additional Feedback using the "Create" feature.

ADDITIONAL FEEDBACK STATUS

When "Additional Feedback" is selected in the Supervisor 1 Menu, the "Additional Feedback Status" web page is displayed.

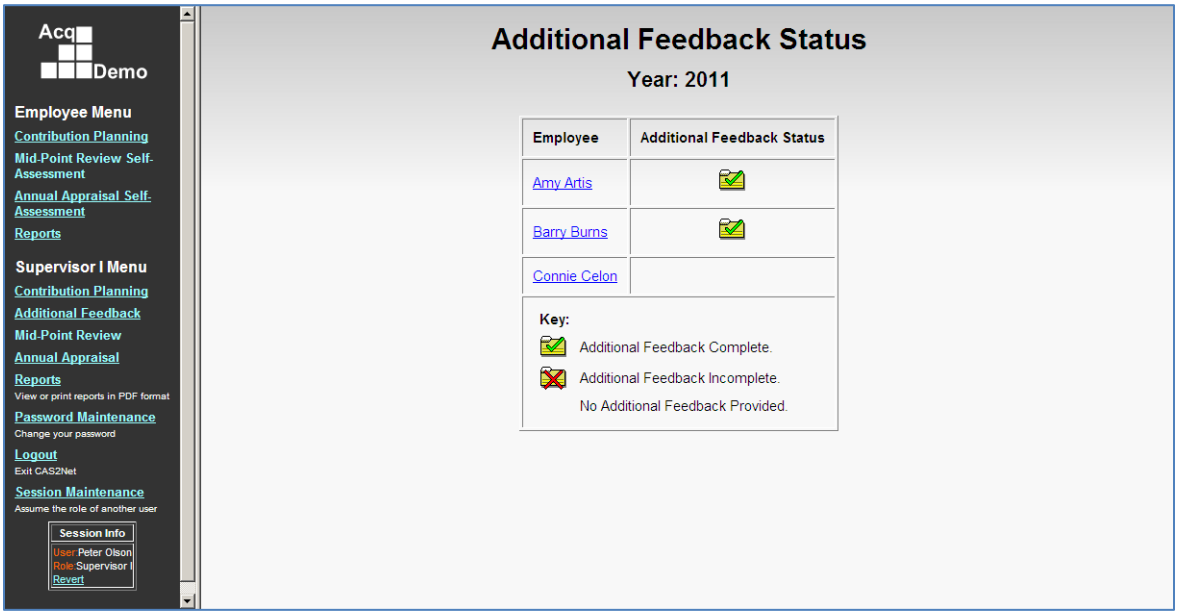


Figure 5-6: Supervisor Additional Feedback Status

CAS2Net lists employees assigned to the supervisor along with Additional Feedback status columns:

- **Employee**
- **Additional Feedback Status**—values include:
  - Green 'checkmark' = 'Complete'
  - Red 'X' = 'Incomplete' (In Progress)
  - (blank) = Not Provided

ADDITIONAL FEEDBACK WEB FORM

On the Additional Feedback Status page, click an employee name to open the Additional Feedback web form.

CAS2Net populates the screen with last saved information for selected employee (if any). Form content includes:

- "As of" subtitle identifies the Additional Feedback by its last saved date and time. The default for a "new" entry is the current date and time.
- Advisory text "DO NOT USE FOR MID-POINT REVIEW FEEDBACK' emphasizes proper use.
- Employee attribute subtitle (Broadband Level, Occupational Series, Career Path, Expected OCS)
- "Contribution Planning" 'read only' textbox contains the last submitted information.

- "Overall Supervisor Feedback" textbox

(Tabs by CAS2Net Performance Factor)

- Factor name subtitle => hot link to "Descriptors and Discriminators" page
- "Supervisor Assessment" textbox

(Tab for Employee Review Date)

- Method of Communication checkboxes (Face to Face, Teleconference, Video Conference, Email, Other)
- "Other" method of communication text.
- Date Conducted
- Date Conducted calendar control.

(Status checkbox and action buttons)

- "Release to Employee" checkbox
- "Save", "Submit", and "Exit" buttons

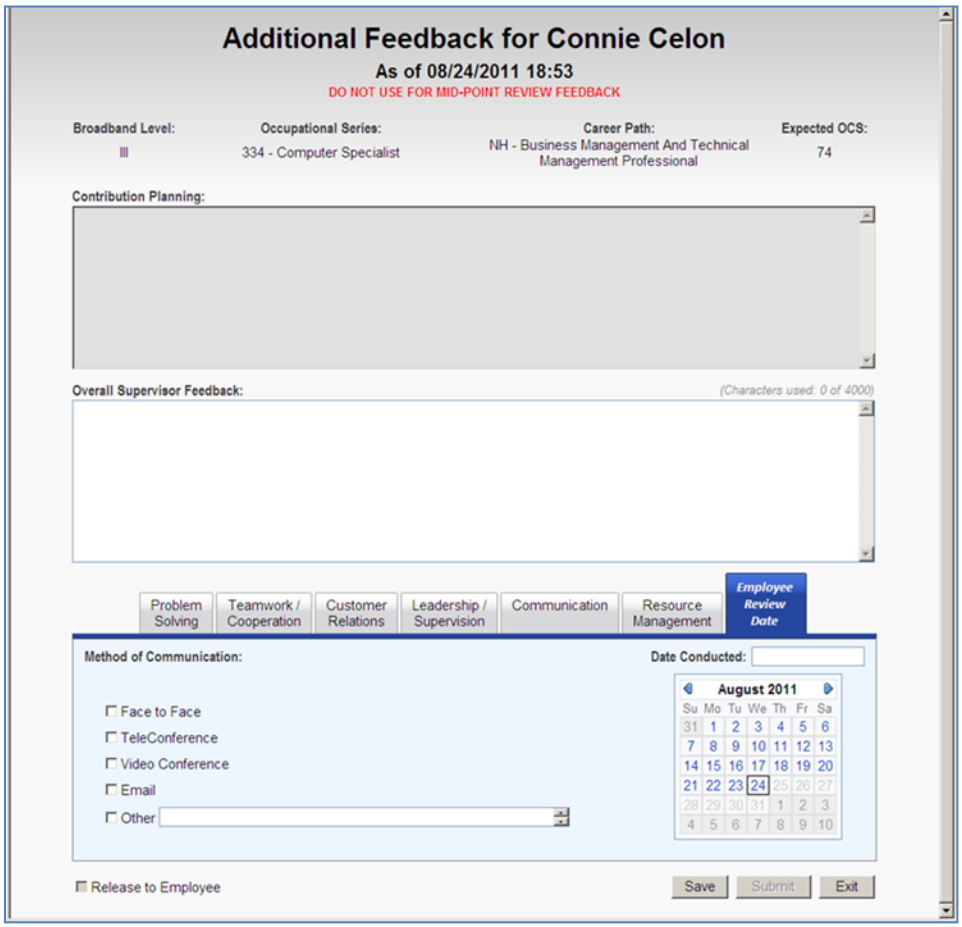


Figure 5-7: Supervisor Additional Feedback Web Form

Enter assessment content into the "Overall Supervisor Feedback" textbox or into one or more "Supervisor Assessment" textboxes provided with performance factor tabs. Note that the factor name on each factor tab is a "hot link" to corresponding "Descriptors and Discriminators" for that factor.

Optionally, check the "Release to Employee" button to allow the employee to print the "Additional Feedback Report" while the entry is "In Progress".

Note: "Release to Employee" is disabled before text is typed into any assessment textbox.

Click "Save" to save changes and refresh the web page.

Click "Exit" to return to the Additional Feedback Status page without saving changes.

After meeting with the employee to review the "Additional Feedback" content, select the date and method of communication and click "Submit" to indicate that the "Additional Feedback" process is complete.

"Submit" saves changes and returns to the Additional Feedback Status page.

Note (1). The "Submit" button is disabled until the date is selected. Once the date is selected, the "Submit" button becomes active and the "Release to Employee" button is disabled.

Note (2)."Release to Employee" checkbox is automatically set when Additional Feedback is submitted.

CREATE ADDITIONAL FEEDBACK

To create another instance of Additional Feedback, click "Additional Feedback" in the Supervisor Menu and select the name of the employee to open the Additional Feedback web form for selected employee.

The "Contribution Planning" input text box is pre-filled with last submitted content.

Hot links provide read-only access to previously submitted "Additional Feedback" entries.

The supervisor may click the "Create" button to open a new Additional Feedback for this employee.

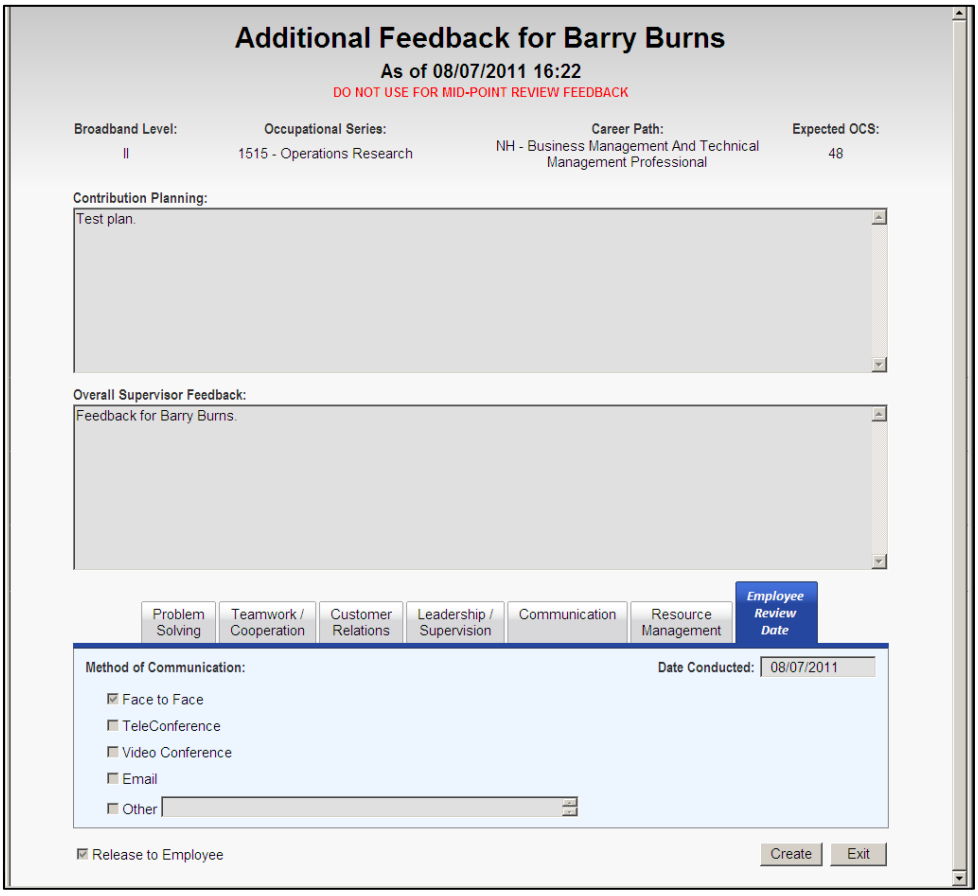


Figure 5-8: "Create" Additional Feedback

When “Create” is clicked, CAS2Net opens a clean Additional Feedback web form

Enter the Additional Feedback text; check “Release to Employee” to allow the employee to print the new Additional Feedback content and click “Save”.

When Additional Feedback input is complete and reviewed with the employee, select method of date and communication and click “Submit”.

5.3 Mid-Point Review

This selection is not yet unavailable. The navigation menu item is presently inactive.

5.4 Annual Appraisal

When "Annual Appraisal" is selected in the Supervisor 1 Menu, CAS2Net displays the "Annual Appraisal Status" page. "Annual Appraisal Status" lists employees to be assessed by the supervisor along with status information:

- Employee
- Self-Assessment status
- Categorical Status
- Numerical Status
- Presumptive Status

Status values include:

- Green checkmark = 'Complete'
- Red 'X' = 'Incomplete' (In progress)
- (blank) = Self-Assessment Not Provided

Note: "Self-Assessment" status is information only; CAS2Net does not enforce any business rules regarding the employee's "Release to Supervisor" state.

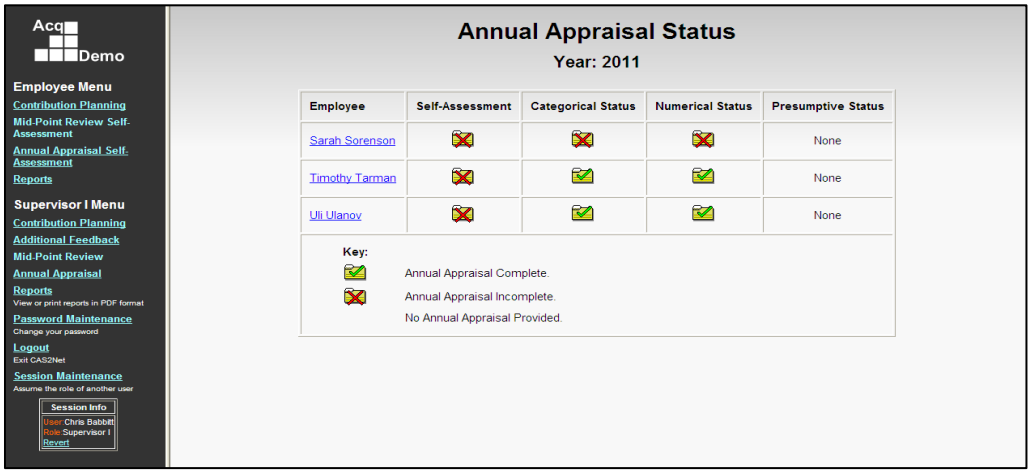


Figure 5-9: Annual Appraisal Status

1. Supervisor clicks to select the employee name.
2. CAS2Net presents the Annual Appraisal page prepopulated with the selected employee data and rating factors.

   Annual Appraisal web page includes:
   - Employee attribute subtitle: Broadband Level, Occupational Series, Career Path, Expected OCS.
   - "Contribution Planning" 'read only' textbox contains the last submitted information.
   - "Hot links" provide access to Additional Feedback and Mid-Point Review instances (if available).
   - Tabs by rating factor: Problem Solving, Teamwork/Cooperation, Customer Relations, Leadership/Supervision, Communication, Resource Management.

   Each rating factor tab provides:
   - "Descriptors and Discriminators" link.
   - Employee Self-Assessment 'read only' textbox.
   - Factor weight.

- Categorical score dropdown list.
- Numerical score dropdown list.
- Supervisor comment text box.

"Save" and "Exit" buttons enable the user to keep or discard changes.

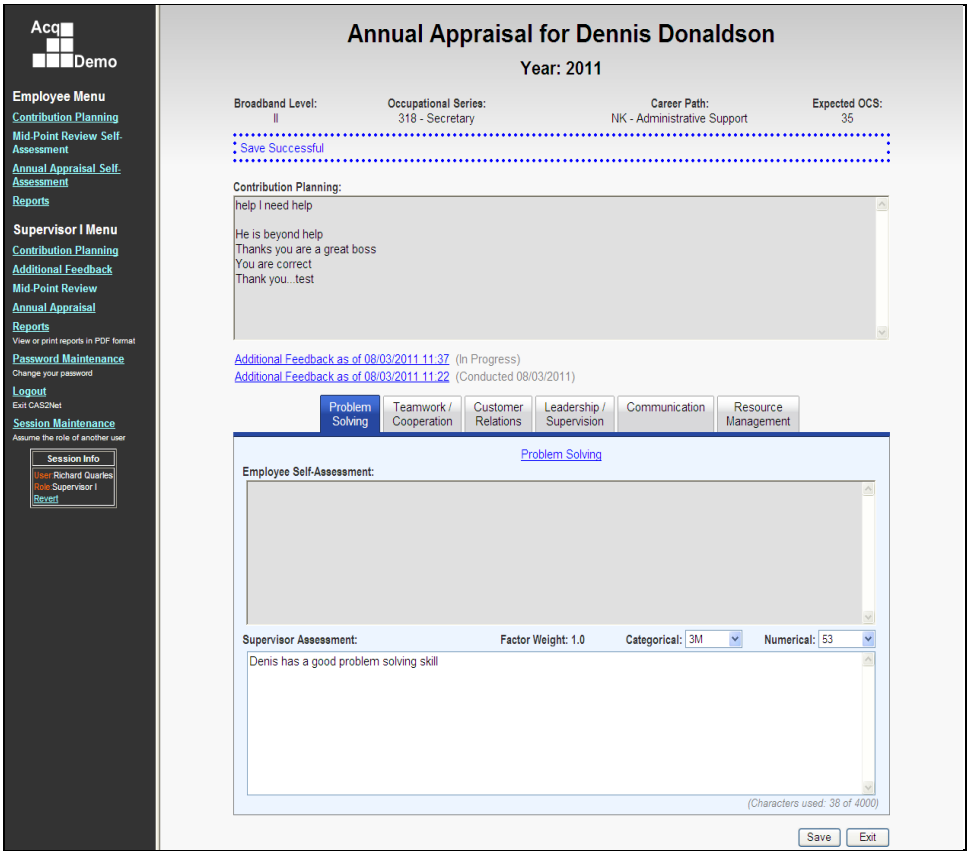


Figure 5-10: Annual Appraisal Web Form

3. Supervisor, one by one, clicks each performance factor to:
   - Enter comments to the Supervisor Assessment text box.
   - Assign Categorical score by selecting score from the "Categorical" dropdown list.
   - Assign Numerical score by selecting the correlated scores with selected "Categorical" rating in "Numerical" dropdown list.
4. Supervisor clicks "Save" button to save the appraisal. When "Save" is clicked, CAS2Net saves the content and displays message "Save Successful".
5. Supervisor clicks "Exit" button to go back to "Annual Appraisal Status" page. If "Exit" is clicked before "Save", CAS2Net does not save the changes and returns to the "Annual Appraisal Status" page.
6. Supervisor can go back to edit/change the appraisal and save it over and over.

Note (1):

- *CAS2Net treats "Categorical" scores as optional since they may not be required by all AcqDemo components.*
- *Changing a "Categorical" score to "Unrated" does not affect the corresponding "Numerical" score.*

- *Changing "Categorical" to a different rating value causes the corresponding "Numerical" score to revert to "Unrated".*

Note (2): If Supervisor needs to change the "Contribution Planning" or Employee needs to change the Self-Assessment, Supervisor can revert all scores (Categorical and Numerical) to "Unrated", then click "Submit".

5.5 Reports

Click "Reports" in the Supervisor I Menu of the navigation bar to display the Supervisor I Reports menu.

CAS2Net displays the following report options for the Level 1 Supervisor.

- Contribution Planning – Single Employee
- Contribution Planning – All Employees
- Additional Feedback – Single Employee
- Additional Feedback – All Employees
- Mid-Point Review (not yet available)
- Appraisal Form Parts II and III – All Employees
- Appraisal Form Parts II and III – Single Employee

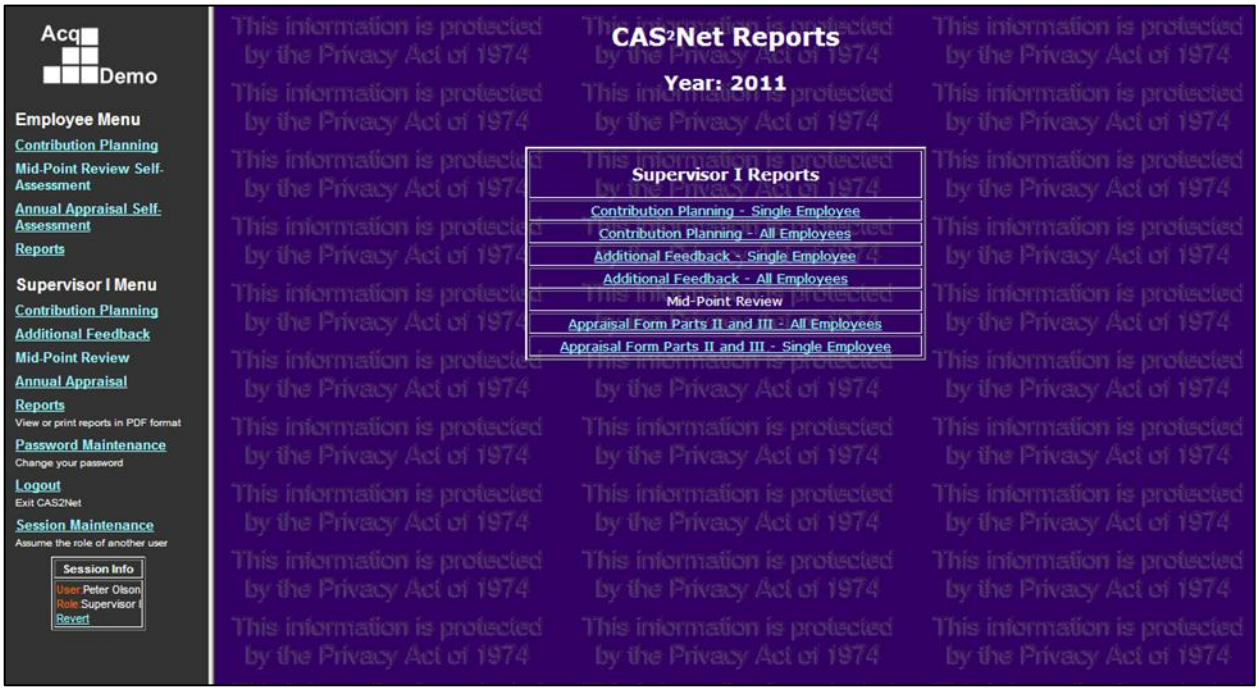


Figure 5-11: Level 1 Supervisor Reports Menu

Refer to Section "10.2 Supervisor Reports" for samples of each report.

LEVEL 1 SUPERVISOR REPORT - SINGLE EMPLOYEE

When the "Single Employee" option is selected, CAS2Net displays the [report] Employee "Report Generation Options" page.

- Select the name of the employee from the "Employee Selection" dropdown.
- Select the "Appraisal Year".
- Click the "Generate" button.

When "Generate" is clicked, CAS2Net runs the selected report and opens a new window to display the generated Adobe PDF file.

Refer to Section "10.2 Supervisor Reports" for report samples.

Note. The "Contribution Planning – Employee" selection dropdown list includes only employees with Contribution Planning entries.

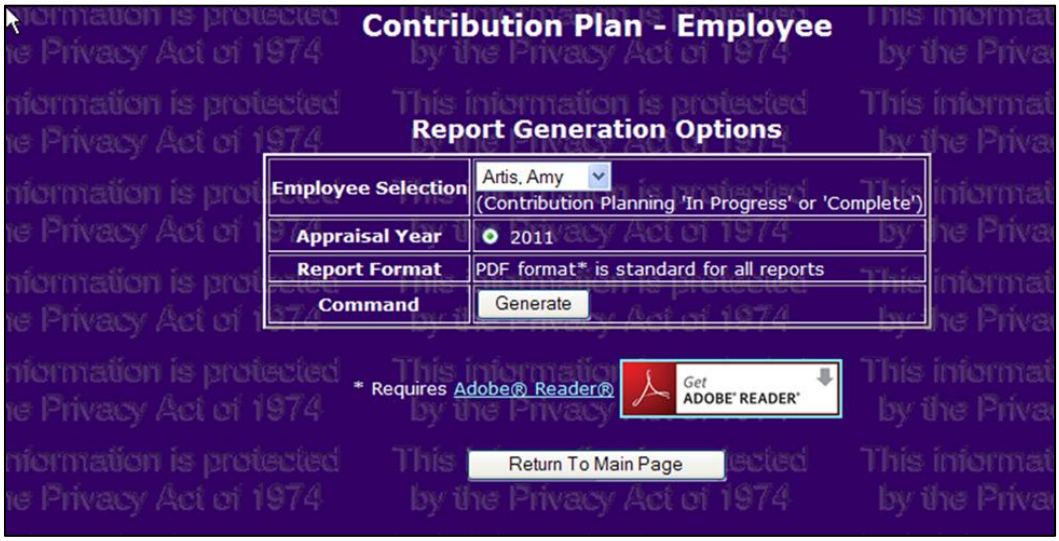
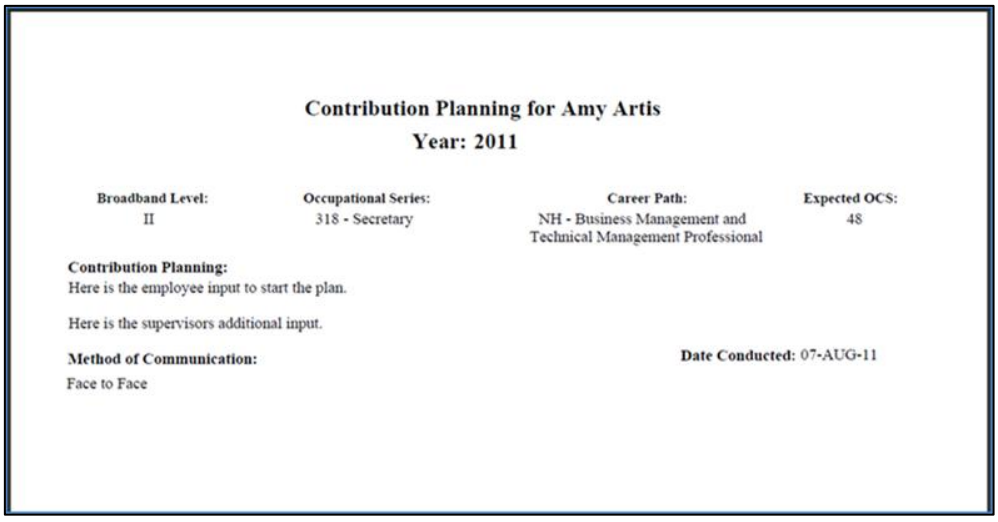


Figure 5-12: Level 1 Supervisor Employee Report Generation Options



Contribution Planning for Amy Artis

Year: 2011

Broadband Level:	Occupational Series:	Career Path:	Expected OCS:
II	318 - Secretary	NH - Business Management and Technical Management Professional	48

Contribution Planning:
Here is the employee input to start the plan.

Here is the supervisors additional input.

Method of Communication:
Face to Face

Date Conducted: 07-AUG-11

Figure 5-13: Level 1 Supervisor Single Employee Report Sample

LEVEL 1 SUPERVISOR REPORT – ALL EMPLOYEES

When the "All Employee" option is selected, CAS2Net displays the [report] Supervisor "Report Generation Options" page.

- Select the name from the "Supervisor Selection" dropdown (defaults to user name).
- Select the "Appraisal Year".
- Click the "Generate" button.

When "Generate" is clicked, CAS2Net runs the selected report for all subordinate employees and opens a new window to display the generated Adobe PDF file. Use Adobe Acrobat controls to scroll through the report files and print selected pages.

Refer to Section "10.2 Supervisor Reports" for report samples.

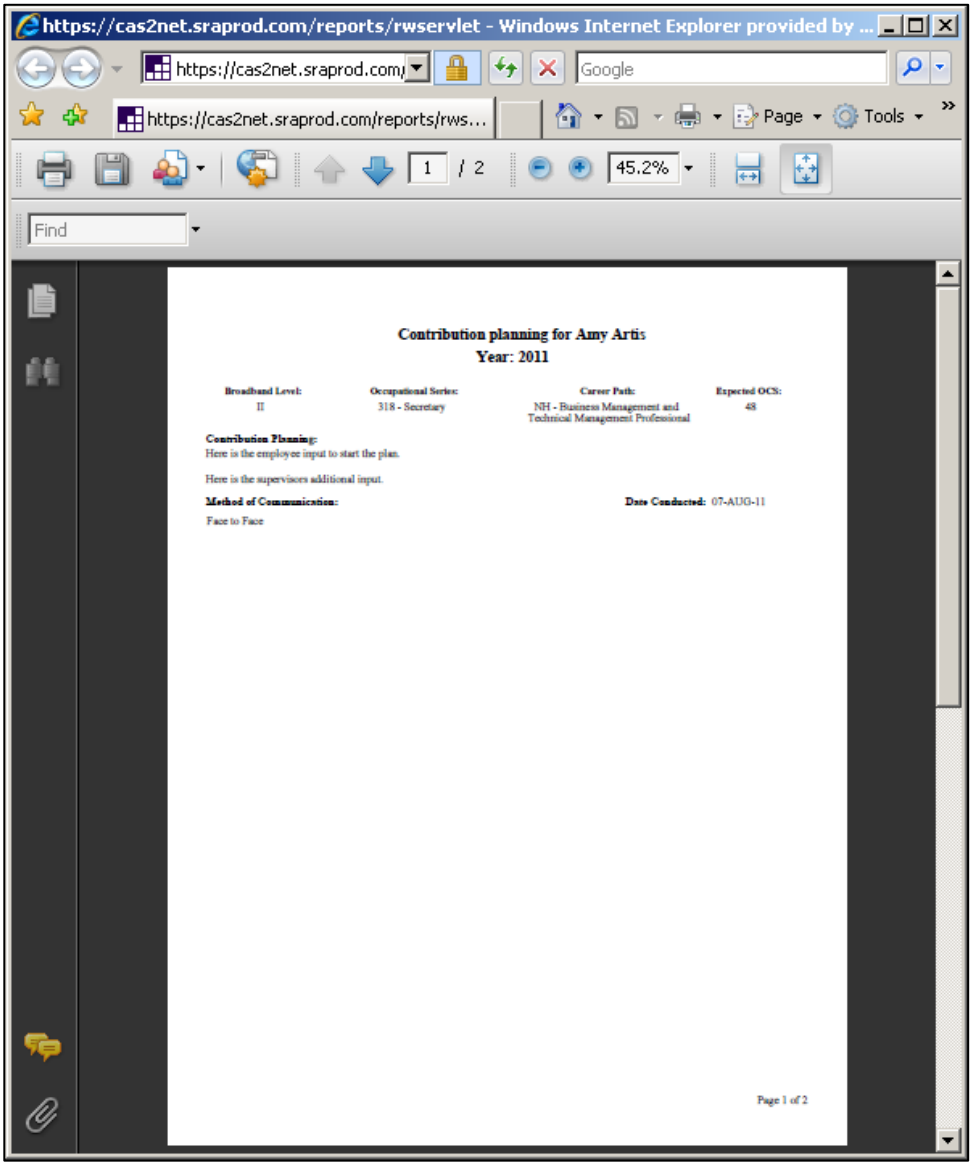


Figure 5-14: Level 1 Supervisor All Employees Report Sample

6. LEVEL 2 SUPERVISOR

The Level 2 Supervisor (also known as the "Sub-Panel Manger") uses CAS2Net to review the rating of a selected employee for completeness of forms and accurate application and adherence to AcqDemo policies and procedures. The Level 2 Supervisor also reviews the performance ratings of employees for fair consideration, and consistency across the appraising supervisors.

If the Level 2 Supervisor is also a "demo" employee, then the following "Employee Menu" options will appear in the upper portion of the navigation bar: **Contribution Planning**, **Mid-Point Review Self-Assessment**, **Annual Appraisal Self-Assessment**, **Reports**, **Password Maintenance** and **Logout**.

Refer to Section "4. Employee" for information relating to the Employee Menu features.

When the Level 2 Supervisor has responsibility for rating the performance of direct reports, then the following supervisor assessment options will appear at the top of the Sub-Panel Manager Menu in the navigation bar: **Contribution Planning**, **Additional Feedback**, **Mid-Point Review**, and **Annual Appraisal**.

These features are detailed in Section "5. Level 1 Supervisor".

All Level 2 Supervisors will have the following menu options: **Sub-Panel Meeting**, **Appraisal Status**, **Reports**, **Password Maintenance** and **Logout**.

- The **Sub-Panel Meeting** option provides the tools for comparing "Categorical" and "Numerical" scores across all employees in the Level 2 Supervisor's reporting hierarchy.
- The **Appraisal Status** option provides appraisal status details by employee.
- The **Reports** option provides the capability to generate reports that list employees, appraisal status, assessments, etc.

6.1 Sub-Panel Meeting

When Sub-Panel Meeting is selected from the Sub-Panel Manager menu, CAS2Net displays the "SubPanel Meeting Menu" selection page.

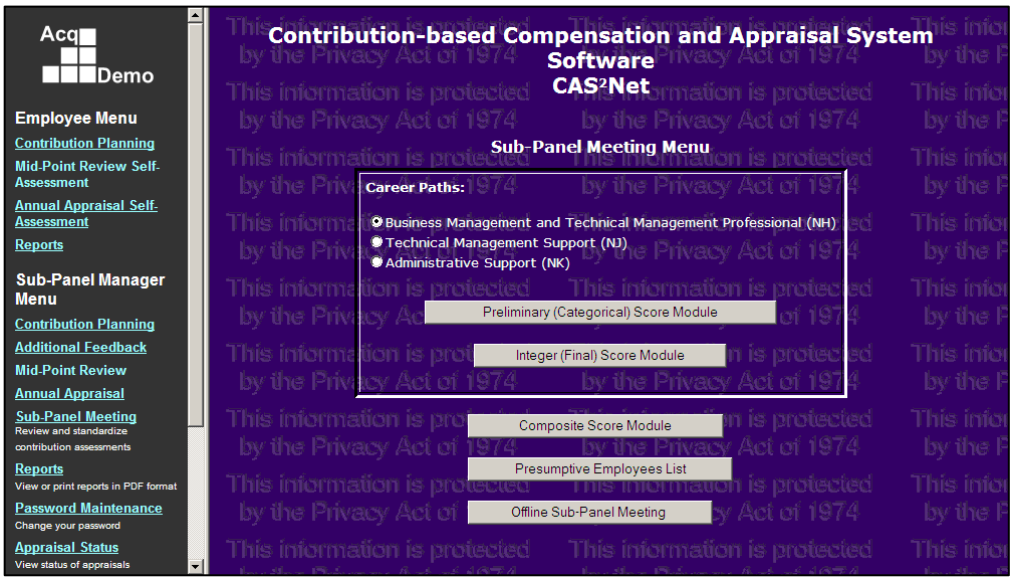


Figure 6-1: Sub Panel Meeting Menu

Choose Career Path radio button.

Click Sub-Panel Meeting Menu option to select Sub-Panel Meeting feature:

- Preliminary (Categorical) Score Module
- Integer (Final) Score Module
- Composite Score Module
- Presumptive Score Module
- Offline Sub-Panel Meeting

6.1.1 Preliminary (Categorical) Score Module

The "Preliminary (Categorical) Score Module" provides tools for reviewing and comparing employee categorical ranking for the same performance factor relative to others in the same career path and level of performance.

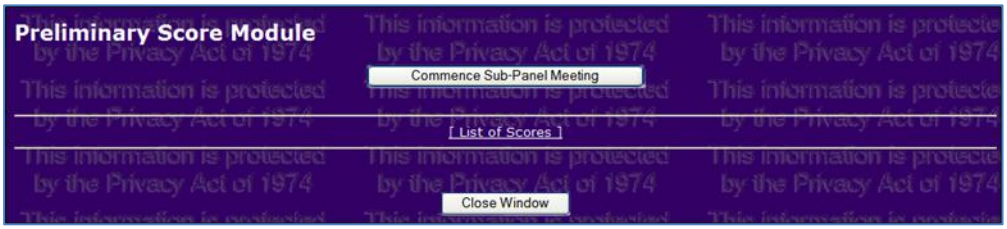


Figure 6-2: Preliminary (Categorical) Score Module "Selection"

Click the "[List of Scores]" link on the Preliminary Score Module selection web page to display the names and preliminary (categorical) scores for all sub-panel employees.

ID	Employee Name	Problem Solving	Teamwork/Cooperation	Customer Relations	Leadership/Supervision	Communication	Resource Management
11	Quarles, Richard (3)	Unrated	Unrated	Unrated	Unrated	Unrated	Unrated
12	Stewart, Tammy (3)	Unrated	Unrated	Unrated	Unrated	Unrated	Unrated
13	Udell, Vincent (3)	Unrated	Unrated	Unrated	Unrated	Unrated	Unrated

Figure 6-3: Preliminary (Categorical) Score Module "List of Scores"

Click the "Commence Sub-Panel Meeting" button to open the Sub-Panel Meeting web page.

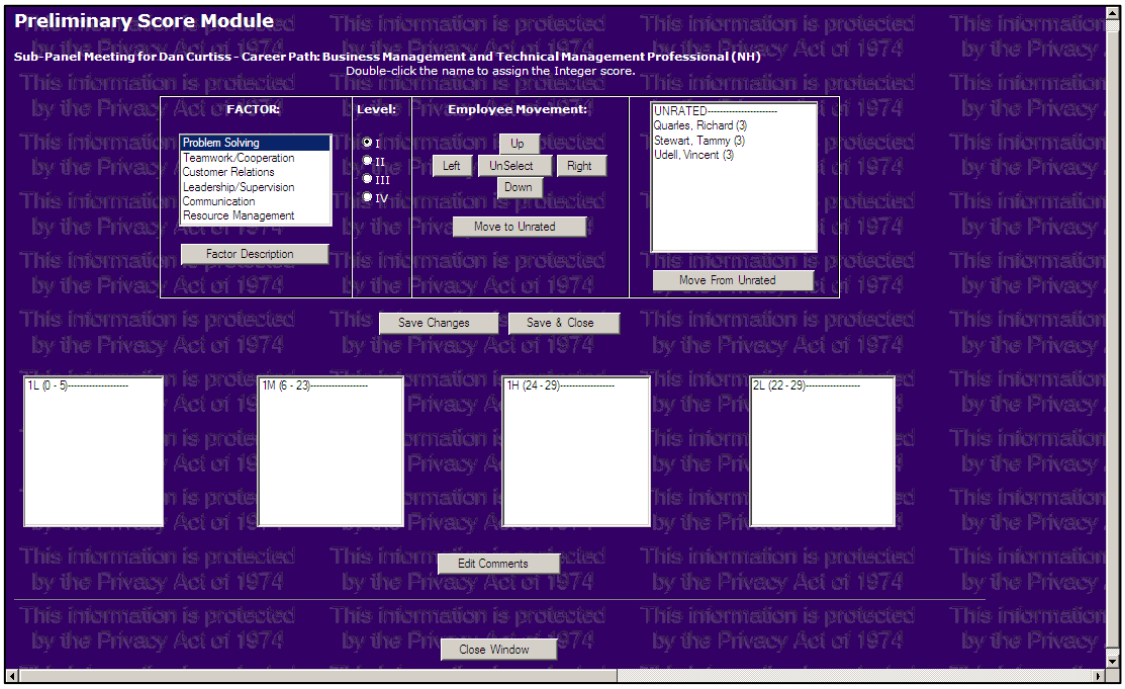


Figure 6-4: Preliminary (Categorical) Score Module Web Page

Integer scores are restricted to specific ranges that vary by career path and preliminary category. When the preliminary category is omitted, any integer score for the given career path is selectable.

Employee names are shown is list boxes that correspond to the preliminary score category along with integer score values, if available. Radio buttons allow the user to show a set of categories corresponding to the lowest to the highest level of performance. Employee movement buttons are provided to redistribute the employee higher or lower in the same list—or left or right to adjacent preliminary category list boxes.

6.1.2 Integer (Final) Score Module

Click "Integer (Final) Score Module" on the Sub-Panel Meeting Menu to display the Integer Score Web Page.

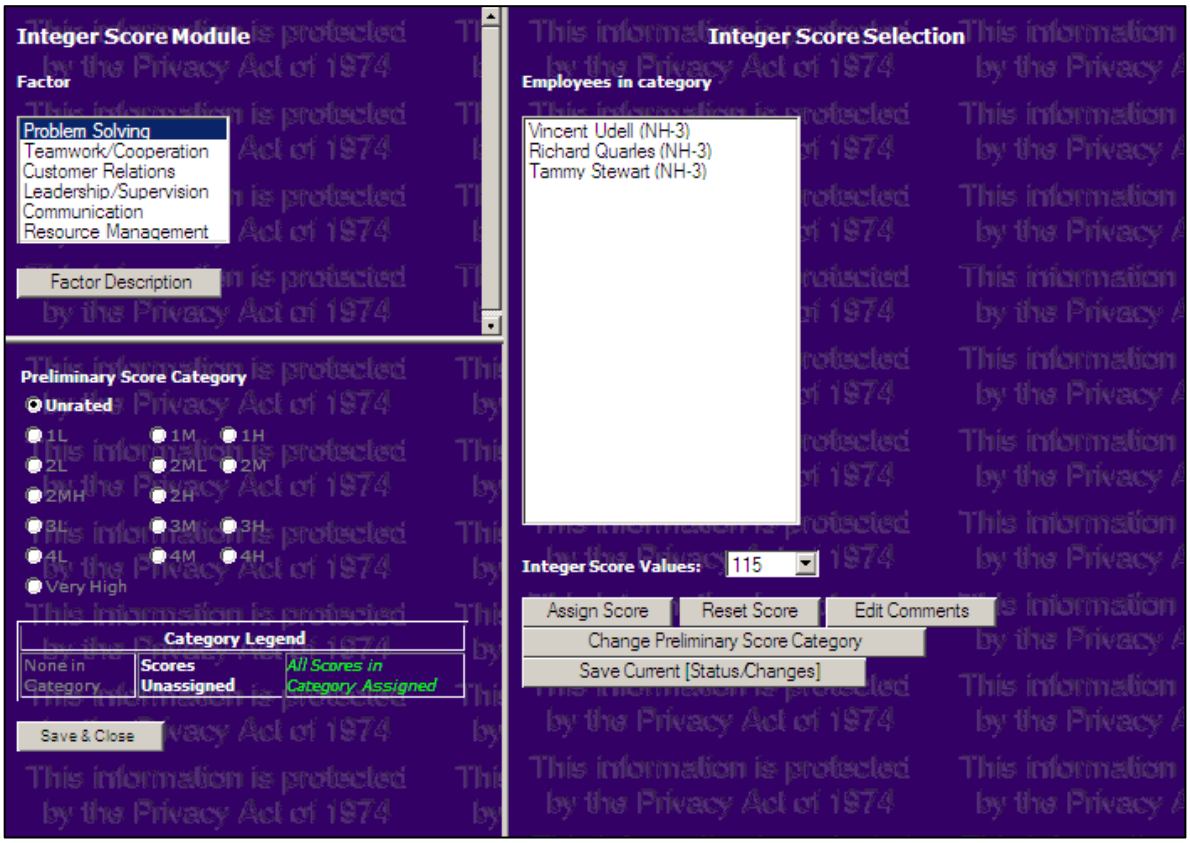


Figure 6-5: Sub-Panel Meeting Integer (Final) Score Module Web Page

Integer scores are restricted to specific ranges that vary by career path and preliminary category. When the preliminary category is omitted, any integer score for the given career path is selectable.

The user selects Sub-Panel Meeting from the CAS2Net main menu. From the Sub-Panel Meeting menu page, the user selects a career path and chooses "Integer (Final) Score Module".

The "Integer Score Module" filters the Sub-Panel employees for the selected career path by performance factor and preliminary score category. The supervisor or manager can select an employee and assign an integer score, edit comments, and change the preliminary score category.

6.1.3 Composite Score Module

The "Composite Score Module" provides a final check on the scores that have been assigned. It calculates an overall OCS score for each employee as a weighted average of the performance factors. All employees and their corresponding OCS scores are displayed in this list.

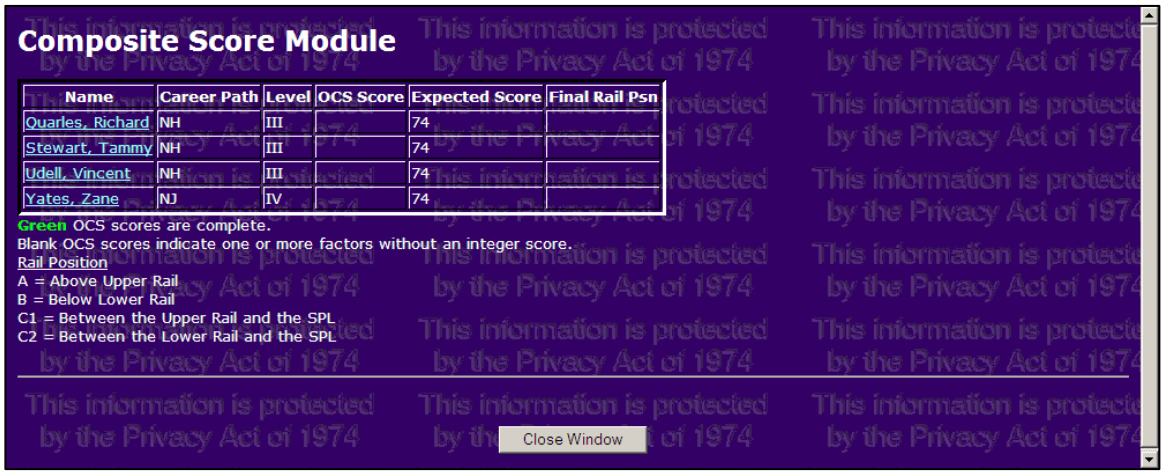


Figure 6-6: Composite Score Module Web Page

The user selects Sub-Panel Meeting from the CAS2Net main menu. From the Sub-Panel Meeting menu page, the user chooses "Composite Score Module'.

CAS2Net brings up a list of employees in the Sub-Panel that includes employee name, career path, performance level, calculated OCS score, expected score, and final rail position.

6.1.4 Presumptive Employees List

Click the "Presumptive Employees List" button to display a listing of presumptive employees.

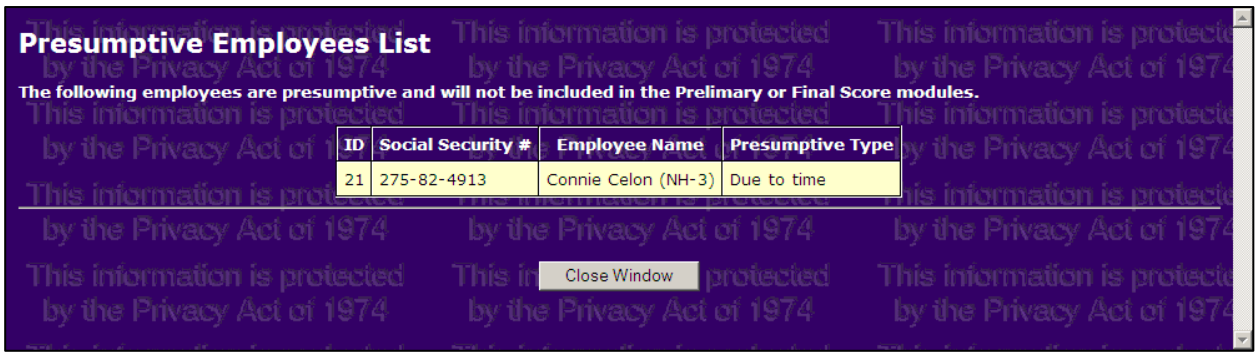


Figure 6-7: Presumptive Employees List

The "Presumptive Employees List" includes the CAS2Net employee id, social security number, employee name and presumptive type

6.1.5 Offline Sub-Panel Meeting

The Offline Interface web page provides the tools to upload or download Employee Data for the Sub-Panel Meeting.

From the Sub Panel Meeting Menu page, click "Offline Sub-Panel Meeting" to display the "Offline Interface" page with buttons to choose download or upload employee data functions.

Figure 6-8: Sub Panel Meeting "Offline Interface" Menu

SUB-PANEL DOWNLOAD EMPLOYEE DATA

Click "Download Employee Data" to display the "Offline Interface – Download Employee Data" page.

Figure 6-9: Offline Interface – Download Employee Data

The Level 2 Supervisor has the capability to download sub-panel employee data that can later be imported into the CCAS Spreadsheet for Sub-Panel review. When offline meeting activities are concluded, the data can be exported from the spreadsheet and uploaded back to the CAS2Net database using the "Upload Employees Scores" button.

Click the filename hot link to produce a text file containing CAS2Net employee data in "comma delimited file" (CSV) file format.

SUB-PANEL UPLOAD EMPLOYEE DATA

Click "Upload Employee Data" to display the "Offline Interface – Upload Employee Data" page.

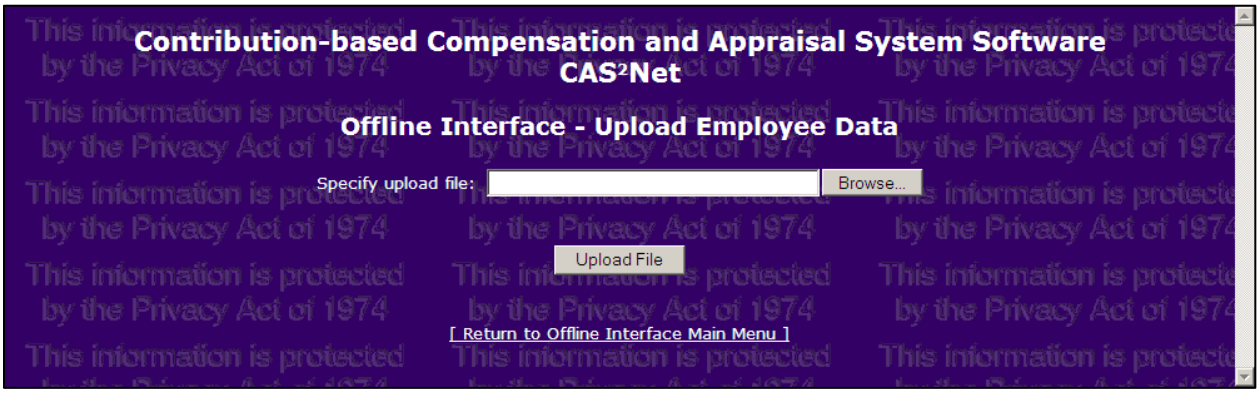


Figure 6-10: Offline Interface – Upload Employee Data

"Upload Employee Data" parses an external text file produced by the CCAS Spreadsheet and updates the CAS2Net database with the file content.

6.2 Appraisal Status

The Appraisal Status web page lists Sub-Panel Manager employees' appraisal status for review by First Level Supervisor.

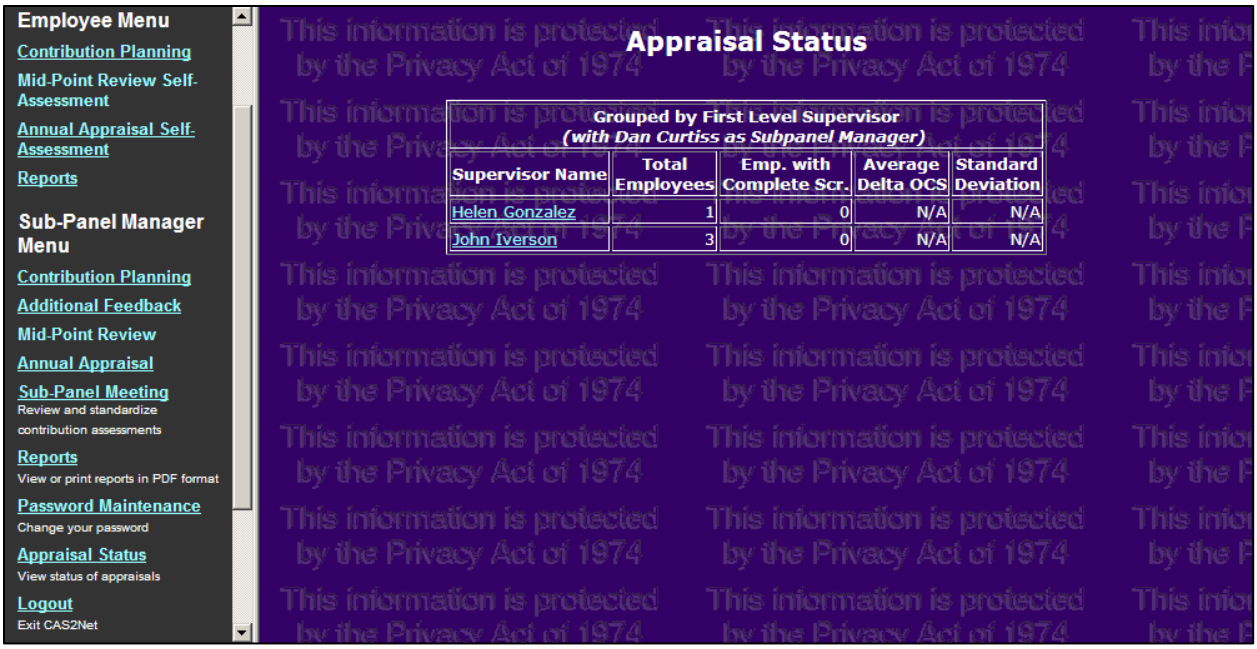


Figure 6-11: Level 2 Supervisor Appraisal Status

2nd Level Supervisors are shown Sub-Panel employees grouped by 1st Level Supervisor.

Click the supervisor name to drill down to the 1st Level Supervisor list or the detail page listing subordinate employees.

Employee detail columns include (1st Level) supervisor name, (paypool) office symbol, employee name, previous OCS, current OCS, expected OCS, and individual scores by each performance factor.

Figure 6-12: Level 2 Supervisor Appraisal Status Employee Details

6.3 Reports

Click "Reports" in the Sub-Panel Manager Menu of the navigation bar to display the Sub-Panel Manager Reports menu.

CAS2Net provides the following report options for the Level 2 Supervisor.

- Contribution Planning – Single Employee
- Contribution Planning – All Employees
- Additional Feedback – Single Employee
- Additional Feedback – All Employees
- Mid-Point Review (not yet available)
- Appraisal Form Parts II and III – All Employees
- Appraisal Form Parts II and III – Single Employee
- Appraisal Form Part II By Employee
- Appraisal Form Part II by Supervisor
- Appraisal Status Report

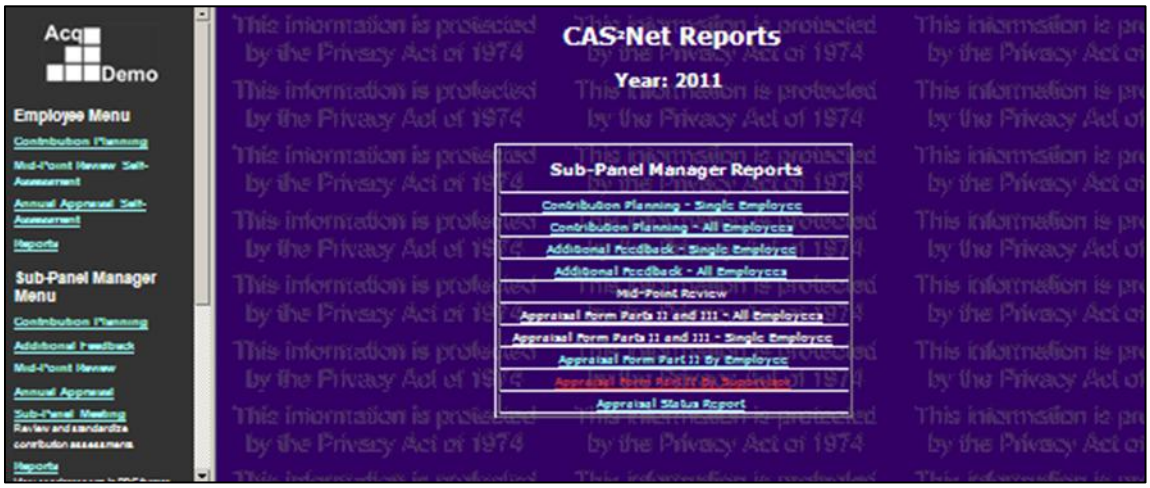


Figure 6-13: Level 2 Supervisor Reports Menu

Refer to Section "10.2 Supervisor Reports" for samples of each report.

7. PAYPOOL MANAGER

The Paypool Manager uses the CAS2NET to monitor the progress of performance appraisals through the review workflow. The Paypool Manager views the performance ratings of employees in the paypool for fair consideration, and consistency across the appraising supervisors.

If the Paypool Manager is also a "demo" employee, then the following "Employee Menu" options will appear in the upper portion of the navigation bar: **Contribution Planning**, **Mid-Point Review Self-Assessment**, **Annual Appraisal Self-Assessment** and **Reports.**

Refer to Section "4. Employee" for information relating to the Employee Menu features.

When the Paypool Manager has responsibility for rating the performance of direct reports, then the following supervisor options will appear at the top of the Paypool Manager Menu in the navigation bar: **Contribution Planning, Additional Feedback, Mid-Point Review, and Annual Appraisal.**

Refer to Section "5. Level 1 Supervisor" for information relating to these menu items.

The Paypool Manager will always have the following menu options: **Sub-Panel Meeting**, **Appraisal Status**, **Reports**, **Password Maintenance** and **Logout**.

- The **Sub-Panel Meeting** option provides the tools for comparing "Categorical" and "Numerical" scores across all employees in the paypool.
- The **Appraisal Status** option provides appraisal status details by employee.
- The **Reports** option provides the capability to generate reports that list employees, appraisal status, assessments, etc.

7.1 Sub-Panel Meeting

When Sub-Panel Meeting is selected from the Paypool Manager menu, CAS2Net displays the "SubPanel Meeting Menu" selection page.

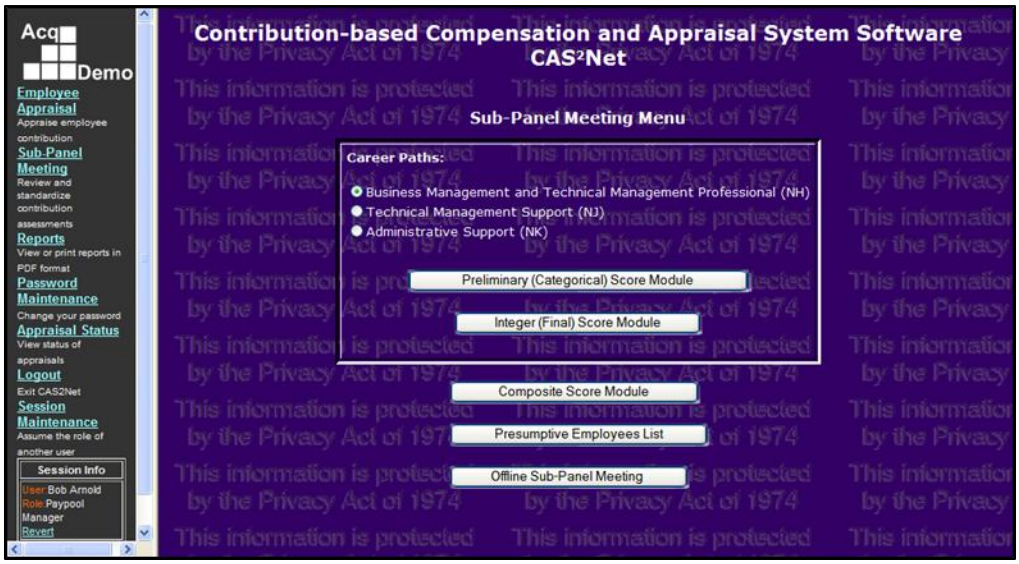


Figure 7-1: Sub Panel Meeting Menu

Click the radio button associated with a given Career Path selection.

Click one of the following buttons to activate the Sub-Panel Meeting module:

- Preliminary (Categorical) Score Module
- Integer (Final) Score Module
- Composite Score Module
- Presumptive Score Module
- Offline Sub-Panel Meeting

7.1.1 Preliminary (Categorical) Score Module

The "Preliminary (Categorical) Score Module" provides tools for reviewing and comparing employee categorical ranking for the same performance factor relative to others in the same career path and level of performance.

Figure 7-2: Preliminary (Categorical) Score Module "Selection" Menu

Click the "[List of Scores]" link on the Preliminary Score Module selection web page to display the names and preliminary (categorical) scores for all sub-panel employees.

ID	Employee Name	Problem Solving	Teamwork/Cooperation	Customer Relations	Leadership/Supervision	Communication	Resource Management
6	Gonzalez, Helen (4)	Unrated	Unrated	Unrated	Unrated	Unrated	Unrated
7	Iverson, John (4)	Unrated	Unrated	Unrated	Unrated	Unrated	Unrated
1472	Michelson, Nancy (4)	Unrated	Unrated	Unrated	Unrated	Unrated	Unrated

Figure 7-3: Preliminary (Categorical) Score Module "List of Scores"

Click the "Commence Sub-Panel Meeting" button to open the Sub-Panel Meeting web page.

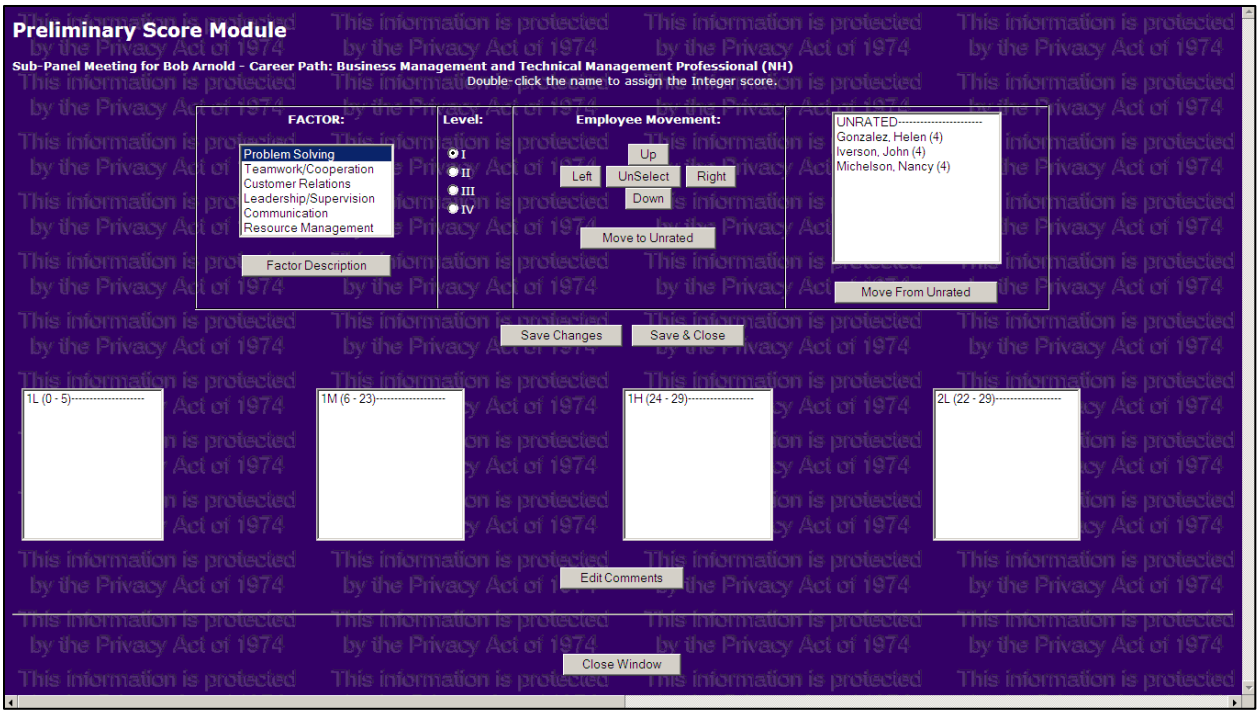


Figure 7-4: Preliminary (Categorical) Score Module Web Page

Integer scores are restricted to specific ranges that vary by career path and preliminary category. When the preliminary category is omitted, any integer score for the given career path is selectable.

Employee names are shown is list boxes that correspond to the preliminary score category along with integer score values, if available. Radio buttons allow the user to show a set of categories corresponding to the lowest to the highest level of performance. Employee movement buttons are provided to redistribute the employee higher or lower in the same list—or left or right to adjacent preliminary category list boxes.

7.1.2 Integer (Final) Score Module

Click "Integer (Final) Score Module" on the Sub-Panel Meeting Menu to display the Integer Score Web Page.

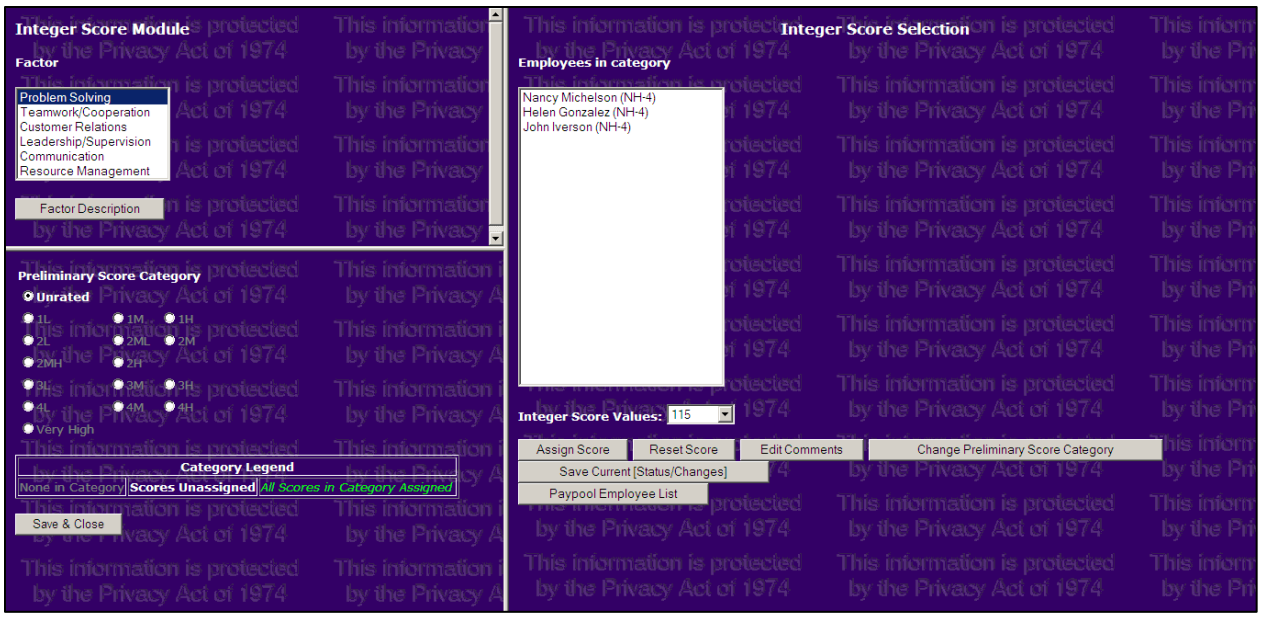


Figure 7-5: Sub-Panel Meeting Integer (Final) Score Module Web Page

Integer scores are restricted to specific ranges that vary by career path and preliminary category. When the preliminary category is omitted, any integer score for the given career path is selectable.

The "Integer Score Module" filters the Sub-Panel employees for the selected career path by performance factor and preliminary score category. The supervisor or manager can select an employee and assign an integer score, edit comments, and change the preliminary score category.

7.1.3 Composite Score Module

The "Composite Score Module" provides a final check on the scores that have been assigned. It calculates an overall OCS score for each employee as a weighted average of the performance factors. All employees and their corresponding OCS scores are displayed in this list.

From the Sub-Panel Meeting menu page, click "Composite Score Module'.

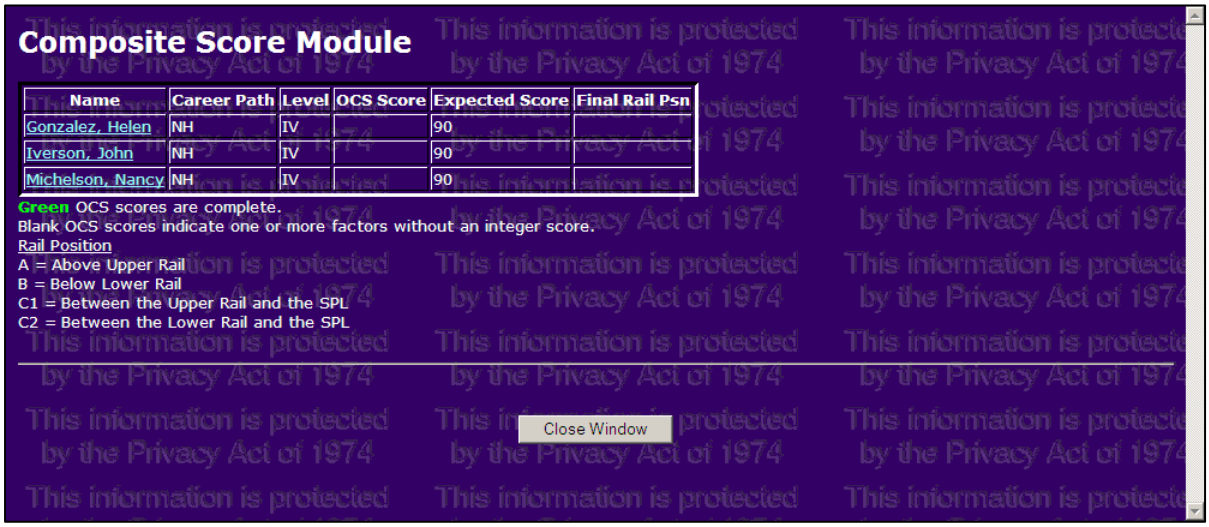


Figure 7-6: Composite Score Module Web Page

CAS2Net brings up a list of employees in the Sub-Panel that includes employee name, career path, performance level, calculated OCS score, expected score, and final rail position.

7.1.4 Presumptive Employees List

From the Sub-Panel Meeting menu page, click the "Presumptive Employees List" button to display a listing of presumptive employees.

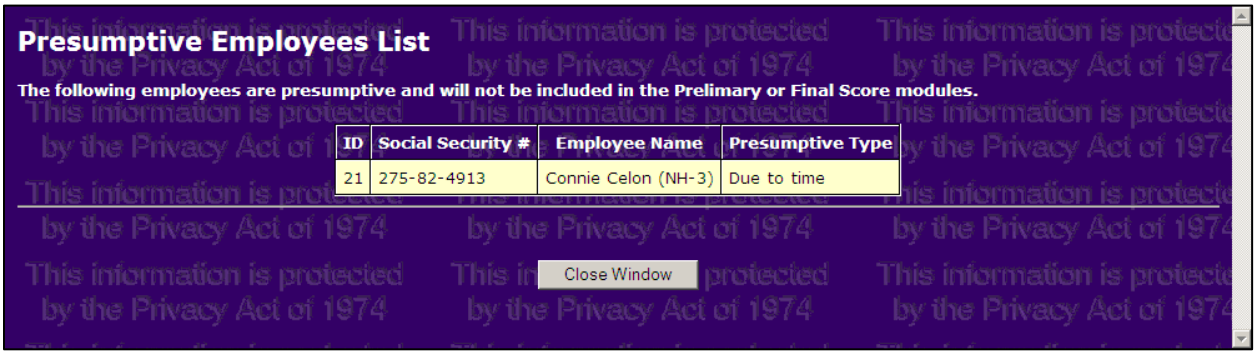


Figure 7-7: Presumptive Employees List

The "Presumptive Employees List" includes employee id, social security number, name and presumptive type.

7.1.5 Offline Sub-Panel Meeting

The Offline Interface web page provides the tools to upload or download Employee Data for the Sub-Panel Meeting.

From the Sub Panel Meeting Menu page, click "Offline Sub-Panel Meeting" to display the "Offline Interface" page with buttons to choose download or upload employee data functions.

Figure 7-8: Sub Panel Meeting "Offline Interface" Menu

SUB-PANEL DOWNLOAD EMPLOYEE DATA

Click "Download Employee Data" to display the "Offline Interface – Download Employee Data" page.

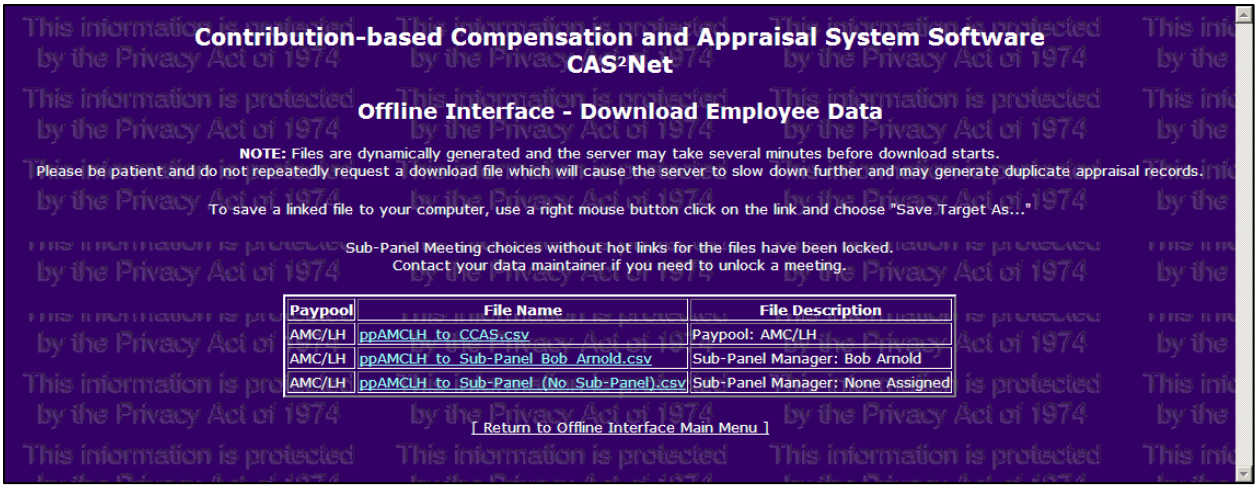


Figure 7-9: Offline Interface – Download Employee Data

The Paypool Manager has the capability to download employee data that can later be imported into the CCAS Spreadsheet for paypool or sub-panel review. When offline meeting activities are concluded, the data can be exported from the spreadsheet and uploaded back to the CAS2Net database using the "Upload Employees Scores" button.

Click the filename hot link to produce a text file containing CAS2Net employee data in "comma delimited file" (CSV) file format.

SUB-PANEL UPLOAD EMPLOYEE DATA

Click "Upload Employee Data" to display the "Offline Interface – Upload Employee Data" page.

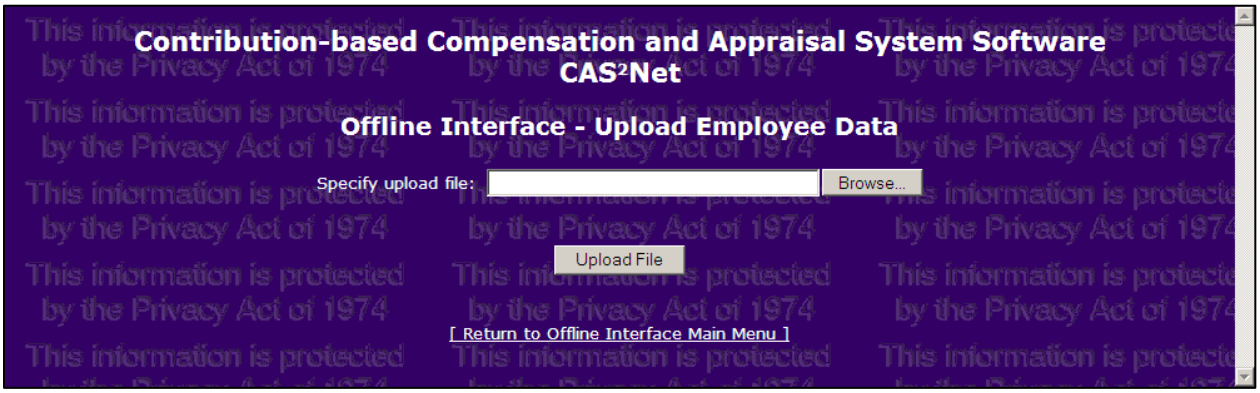


Figure 7-10: Offline Interface – Upload Employee Data

"Upload Employee Data" parses an external text file produced by the CCAS Spreadsheet and updates the CAS2Net database with the file content.

7.2 Appraisal Status

The Appraisal Status web page lists Sub-Panel Meeting employee appraisal status for review by Sub-Panel Meeting managers grouped by 1st and/or 2nd Level Supervisor.

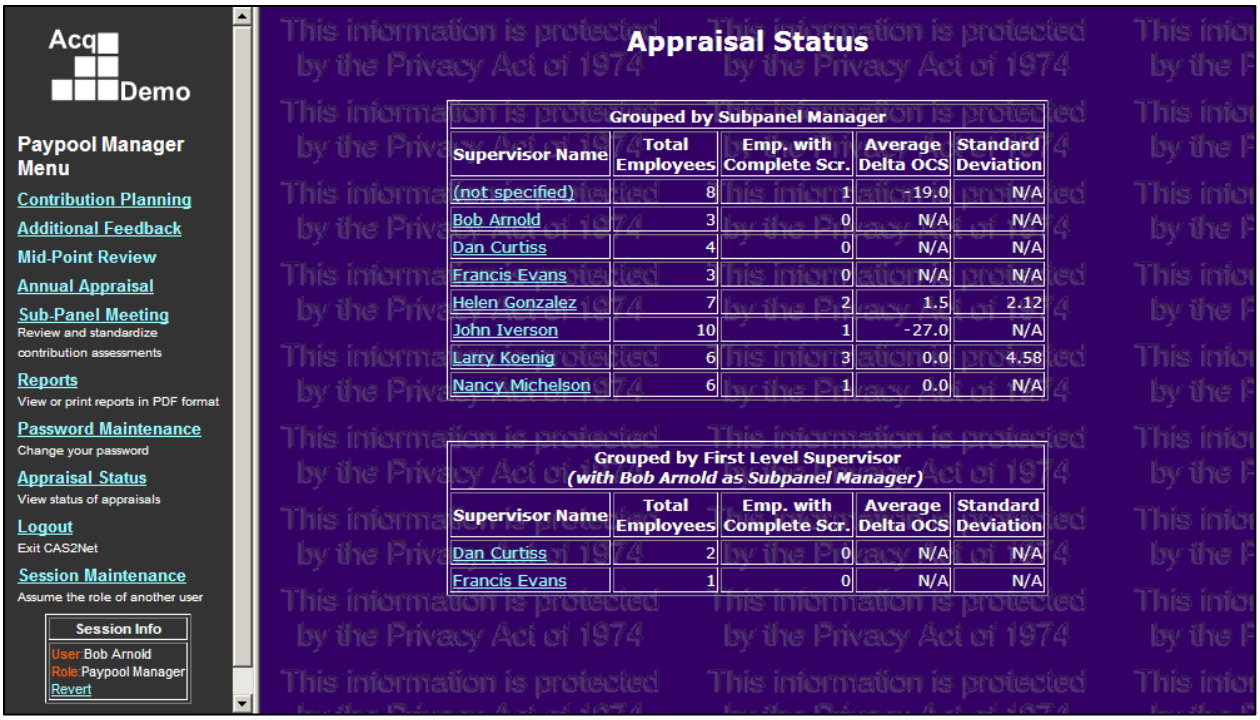


Figure 7-11: Paypool Manager Appraisal Status

Paypool Managers are shown sub-panel employees grouped by 2nd Level Supervisor. Information columns include supervisor name, total employees, number of employees with complete scores, average delta OCS, and standard deviation.

Click a supervisor name to drill down to the lower level supervisor list or the detail page listing subordinate employees.

Employee detail columns include (1st Level) supervisor name, (paypool) office symbol, employee name, previous OCS, current OCS, expected OCS, and individual scores by each performance factor.

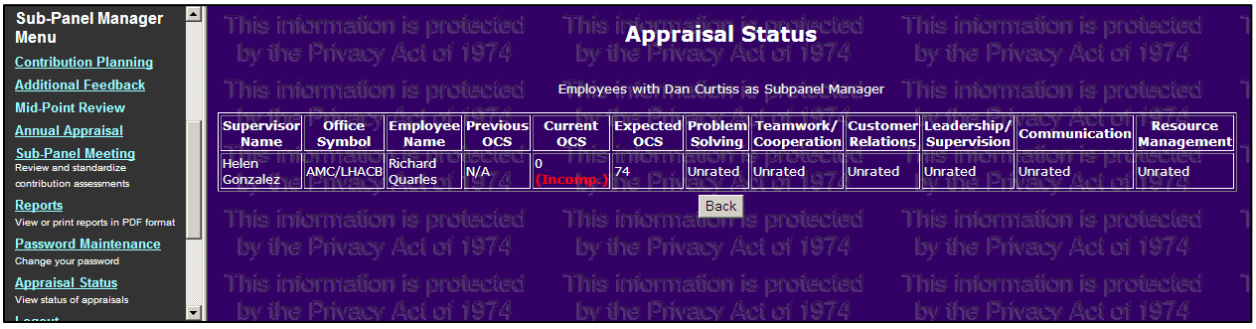


Figure 7-12: Level 2 Supervisor Appraisal Status Employee Details

7.3 Reports

Click "Reports" in the Paypool Manager Menu of the navigation bar to display the Paypool Manager Reports menu.

CAS2Net displays the following report options for the Paypool Manager.

- Contribution Planning – Single Employee
- Contribution Planning – All Employees
- Additional Feedback – Single Employee
- Additional Feedback – All Employees
- Mid-Point Review (not yet available)
- Appraisal Form Parts II and III – All Employees
- Appraisal Form Parts II and III – Single Employee
- CAS2Net Status Report
- Appraisal Status Report
- Supervisor Roster by Employee
- Supervisor Roster by Supervisor

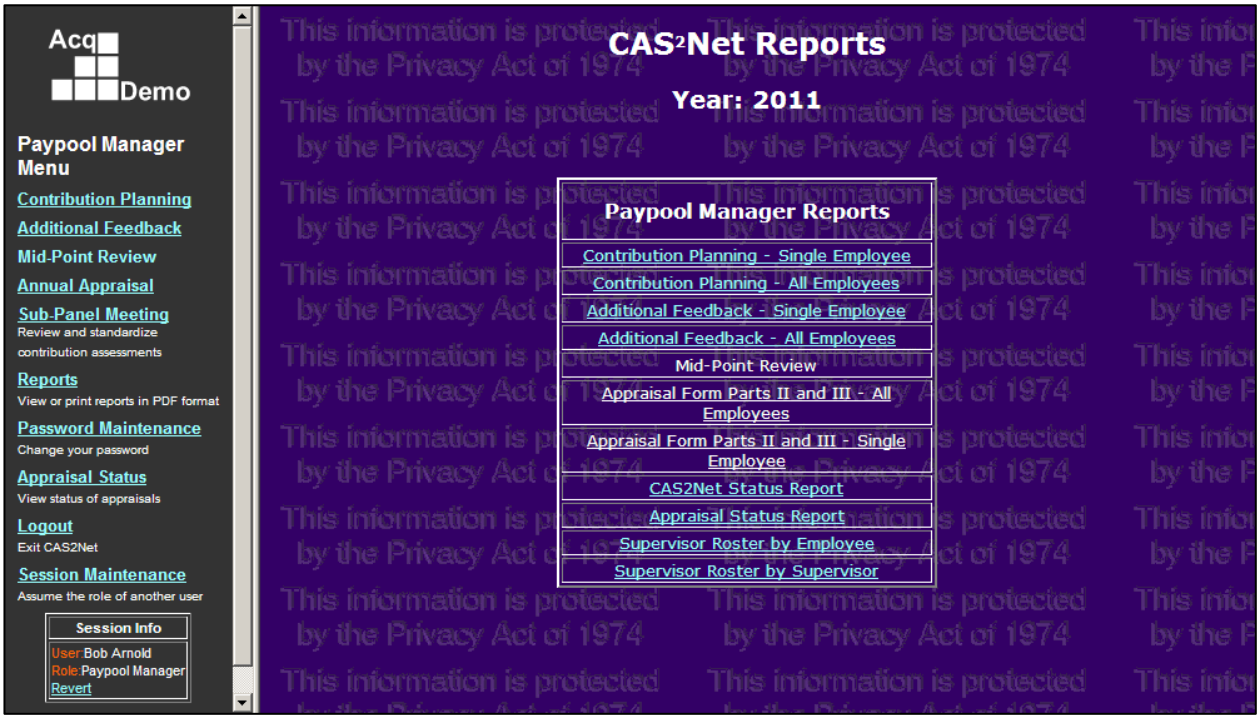


Figure 7-13: Paypool Manager Reports Menu

Refer to Section "10.2 Supervisor Reports" for samples of each report.

8. DATA MAINTAINER

This section provides guidance for the CAS2Net Data Maintainer to monitor the progress of appraisal activities for employees in the assigned paypool and utilize CAS2Net online tools to perform day to day paypool administration.

If the Data Maintainer is also a "demo"employee, then the following "Employee Menu" options will appear in the upper portion of the navigation bar: **Contribution Planning**, **Mid-Point Review Self-Assessment**, **Annual Appraisal Self-Assessment**, and **Reports**.

Refer to Section "4. Employee" for information relating to the Employee Menu features.

When the Data Maintainer has responsibility for rating the performance of direct reports, then the following supervisor options will appear at the top of the Data Maintainer Menu in the navigation bar: **Contribution Planning**, **Additional Feedback**, **Mid-Point Review**, and **Annual Appraisal.** These features are detailed in Section "5. Level 1 Supervisor".

The following options appear in the Data Maintainer Menu of the navigation bar after you have successfully logged in: **Appraisal Status and Lock**, **Reports, Data Maintenance, Offline Maintenance, Offline Interface, Paypool Notices**, **Password Maintenance** and **Logout**.

- **Appraisal Status and Lock** summarizes the appraisal status of employees in the assigned paypool by supervisor level; provides the capability to drill down by supervisor to list employee details; and locks or unlocks appraisals by sub-panel manager or for the entire paypool.
- The **Reports** option provides the capability to generate reports that list employees, appraisal status, assessments, etc.
- **Data Maintenance** provides maintenance tools for creating or updating employee records; supports assignment of one or more employees to the Level 1 Supervisor, Level 2 Supervisor, Sub-Panel Manager, or Paypool Manager of your assigned paypool; provides the capability to assign one or more supervisors to an employee in your assigned paypool.
- The **Offline Interface** option provides tools for selecting a paypool or sub-panel employee data file to "Download Employee Data" or "Upload Employee Data".
- The **Paypool Notices** option provides the capability to generate Employee Notice documents detailing individual payout information.

8.1 Appraisal Status and Lock

The Appraisal Status and Lock web page provides tools to approve and lock appraisals by 2nd Level Supervisors or Paypool Managers. Locking the scores prevents incidental updates after end of cycle activities have commenced.

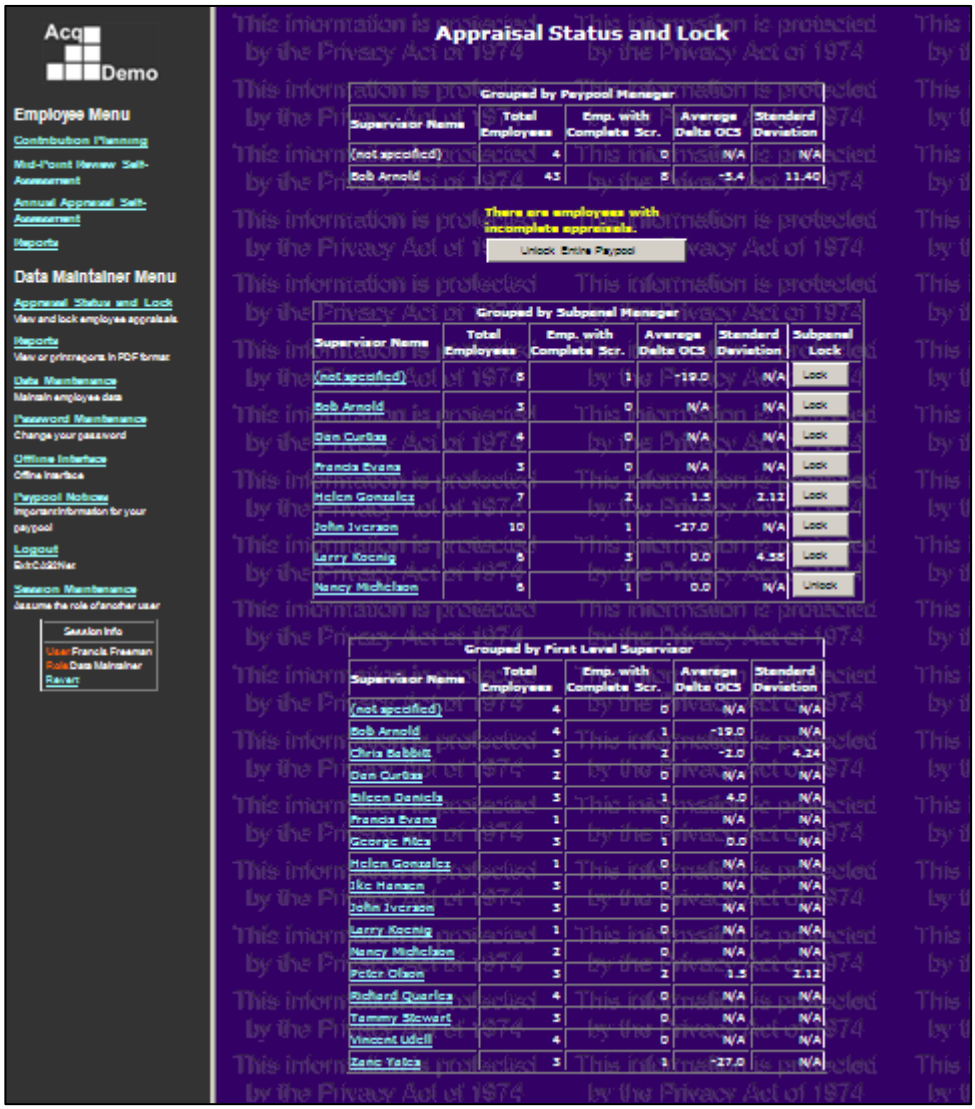


Figure 8-1: Data Maintainer - Appraisal Status and Lock

Preliminary and final scores must be complete in order to approve the appraisal for paypool review.

The "Appraisal Status and Lock" summary page lists paypool status information in three sets: by Paypool Manager, by Sub-Panel Manager (2nd Level Supervisor), and by 1st Level Supervisor As long as corresponding employee appraisal scores are complete, appraisals can be locked at the Sub-Panel Manager level or for the entire paypool.

The supervisor name is a hyperlink to drill down to the 1st Level Supervisor list or the detail page listing subordinate employees. Employee detail columns include (1st Level) supervisor name, (paypool) office symbol, employee name, previous OCS, current OCS, expected OCS, and individual scores by each performance factor.

8.2 Reports

Click "Reports" in the Data Maintainer Menu of the navigation bar to display the Data Maintainer Reports menu.

CAS2Net displays the following report options Data Maintainer.

- CAS2Net Status Report
- Appraisal Form Part II By Employee
- Appraisal Form Part II By Supervisor
- Appraisal Status Report
- Download Employee Data
- Employee Roster
- Post-Cycle Activity Report
- Supervisor Roster by Employee
- Supervisor Roster by Supervisor
- Zone A/CIP Report

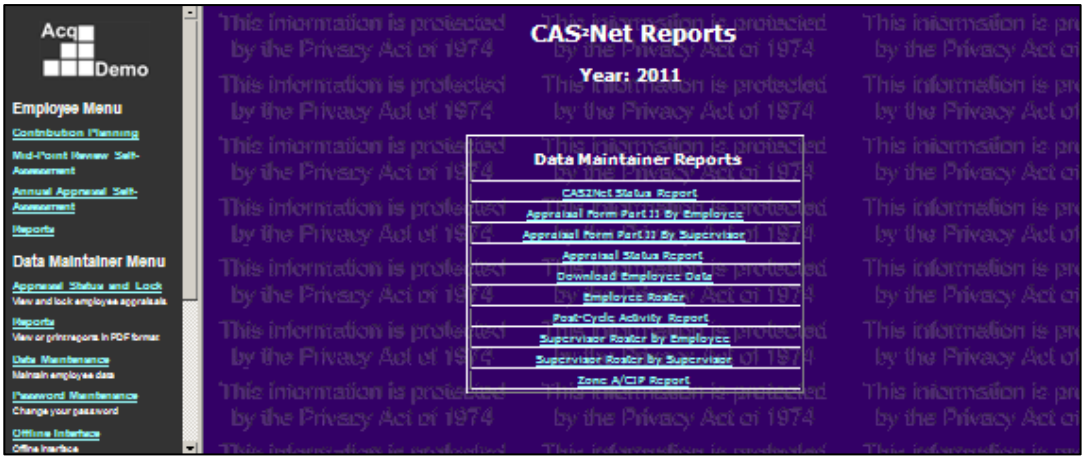


Figure 8-2: Data Maintainer Reports Menu

Refer to Section "10.2 Supervisor Reports" for samples of each report.

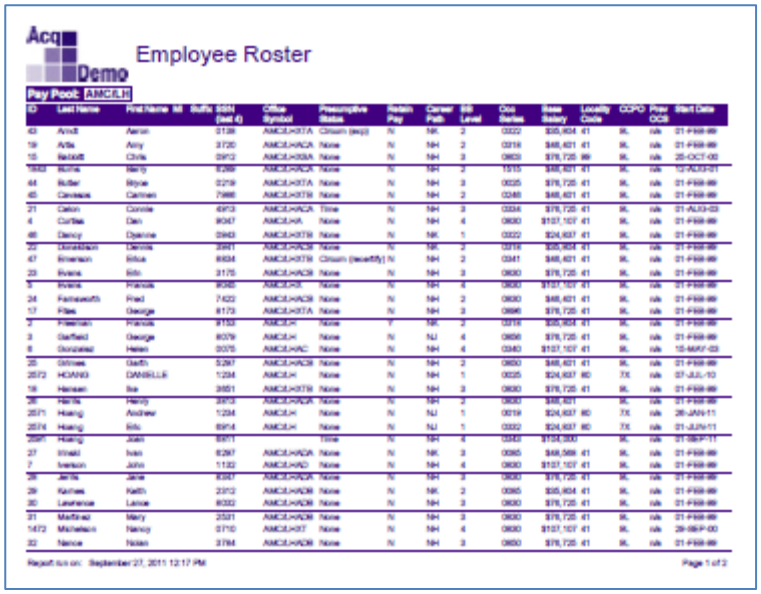
EMPLOYEE ROSTER

Click "Employee Roster" to generate a list of employees in the paypool.

Figure 8-3: Employee Roster Report Generation Options

Since the Data Maintainer's primary duty is to review and update the basic personnel data on all AcqDemo employees in your paypool, the first thing you may choose to do is click on the Reports link on the main menu to bring up the Data Maintainer report menu.

After clicking on Employee Roster, and choosing a sort order (name or office symbol), click the" Generate" button to launch Adobe Acrobat Reader with a roster of all AcqDemo employees in your paypool. If you do not have Adobe Acrobat Reader on your computer, there is a button that will take you to Adobe's website from which you can download the reader.


Acq Demo Employee Roster

Pay Pool: AMCILH

ID	Last Name	First Name	MI	Suffix	SSN (last 4)	Office Symbol	Presumptive Status	Retain Pay	Career Path	BB Level	Occ Series	Base Salary	Locality Code	CCPO	Prev OCS	Start Date
43	Arndt	Aaron			0138	AMCILHXTA	Chosen (acq)	N	NK	2	0322	$35,804	41	IK	n/a	01-Feb-99
19	Arte	Amy			3720	AMCILHXCA	None	N	NH	2	0318	$48,401	41	IK	n/a	01-Feb-99
15	Abbott	Chris			0912	AMCILHX0A	None	N	NH	3	0803	$79,725	99	IK	n/a	25-OCT-00
1553	Bolte	Mary			6289	AMCILHXCA	None	N	NH	2	1515	$48,401	41	IK	n/a	12-AUG-01
44	Butler	Bryce			0219	AMCILHXTA	None	N	NH	3	0025	$79,725	41	IK	n/a	01-Feb-99
45	Cardoza	Carmen			7986	AMCILHXTB	None	N	NH	2	0346	$48,401	41	IK	n/a	01-Feb-99
21	Calon	Connie			6913	AMCILHXCA	Time	N	NH	3	0334	$79,725	41	IK	n/a	01-AUG-03
4	Carlile	Dan			8047	AMCILHX	None	N	NH	4	0830	$107,107	41	IK	n/a	01-Feb-99
46	Darcy	Dianne			3943	AMCILHXTB	None	N	NK	1	0322	$24,637	41	IK	n/a	01-Feb-99
22	Donaldson	Dennis			3941	AMCILHXCB	None	N	NK	2	0318	$35,804	41	IK	n/a	01-Feb-99
47	Emerson	Erica			8934	AMCILHXTB	Chosen (reverse)	N	NH	2	0341	$48,401	41	IK	n/a	01-Feb-99
23	Evans	Erin			3175	AMCILHXCB	None	N	NH	3	0830	$79,725	41	IK	n/a	01-Feb-99
5	Evans	Francis			8085	AMCILHX	None	N	NH	4	0830	$107,107	41	IK	n/a	01-Feb-99
24	Farnsworth	Fred			7422	AMCILHXCB	None	N	NH	2	0830	$48,401	41	IK	n/a	01-Feb-99
17	Files	George			8173	AMCILHXTA	None	N	NH	3	0896	$79,725	41	IK	n/a	01-Feb-99
2	Freeman	Francis			9153	AMCILH	None	Y	NK	2	0318	$35,804	41	IK	n/a	01-Feb-99
3	Garfield	George			8079	AMCILH	None	N	NJ	4	0830	$79,725	41	IK	n/a	01-Feb-99
6	Gonzalez	Helen			9375	AMCILHXC	None	N	NH	4	0340	$107,107	41	IK	n/a	15-MAY-03
25	Grimes	Garth			5297	AMCILHXCB	None	N	NH	2	0830	$48,401	41	IK	n/a	01-Feb-99
2572	HOANG	DANIELLE			1234	AMCILH	None	N	NH	1	0025	$24,637	80	TX	n/a	07-JUL-10
18	Hansen	Ike			3951	AMCILHXTB	None	N	NH	3	0830	$79,725	41	IK	n/a	01-Feb-99
26	Harris	Henry			3913	AMCILHXCA	None	N	NH	2	0830	$48,401		IK	n/a	01-Feb-99
2571	Hoang	Andrew			1234	AMCILH	None	N	NJ	1	0019	$24,637	80	TX	n/a	26-JAN-11
2574	Hoang	Eric			8914	AMCILH	None	N	NJ	1	0332	$24,637	80	TX	n/a	01-JUN-11
2567	Hoang	Joan			8971		Time	N	NH	4	0340	$134,000		IK	n/a	01-SEP-11
27	Hrabi	Ivan			8297	AMCILHXDA	None	N	NK	3	0095	$48,569	41	IK	n/a	01-Feb-99
7	Iverson	John			1132	AMCILHXD	None	N	NH	4	0830	$107,107	41	IK	n/a	01-Feb-99
28	Jerfa	Jane			8361	AMCILHXCA	None	N	NH	3	0830	$79,725	41	IK	n/a	01-Feb-99
29	Kehes	Keith			2312	AMCILHXCB	None	N	NK	2	0095	$35,804	41	IK	n/a	01-Feb-99
30	Lawrence	Lance			8332	AMCILHXCB	None	N	NH	3	0830	$79,725	41	IK	n/a	01-Feb-99
31	Martinez	Mary			2531	AMCILHXCB	None	N	NH	3	0830	$79,725	41	IK	n/a	01-Feb-99
1472	Michelson	Nancy			0710	AMCILHXT	None	N	NH	4	0830	$107,107	41	IK	n/a	26-SEP-00
32	Nance	Nolan			3784	AMCILHXCB	None	N	NH	3	0830	$79,725	41	IK	n/a	01-Feb-99

Report run on: September 27, 2011 12:17 PM Page 1 of 2

Figure 8-4: Employee Roster Report

The employee roster lists the following information for each employee:

- *ID number (a number assigned by the database for internal use)*
- *Last Name*
- *First Name*
- *Middle Initial*
- *Suffix*
- *SSAN*
- *Office Symbol*
- *Presumptive Status*
- *Retained Pay Status*
- *Career Path*
- *Broadband*
- *Occupational Series*
- *Current Base Pay*
- *Locality Pay Area Code*
- *Servicing Civilian Personnel Office Code*
- *Previous OCS*
- *Appraisal Period Start Date*

You can print the roster by clicking the printer icon in Adobe Acrobat Reader. By comparing the printed roster with other rosters and listings provided by your personnel office or maintained within your paypool, you can annotate errors and omissions on your paypool database roster. Once you have marked

up the roster to reflect the actual status of every AcqDemo employee in your paypool, you may use the Data Maintenance module to update the CAS2Net database.

8.3 Data Maintenance

The Data Maintenance module supports modifications to employee attributes and supervisor relationships on the CAS2Net database.

Clicking on the Data Maintenance link in the left side navigation bar of the Main Menu displays the Employee Maintenance Menu.

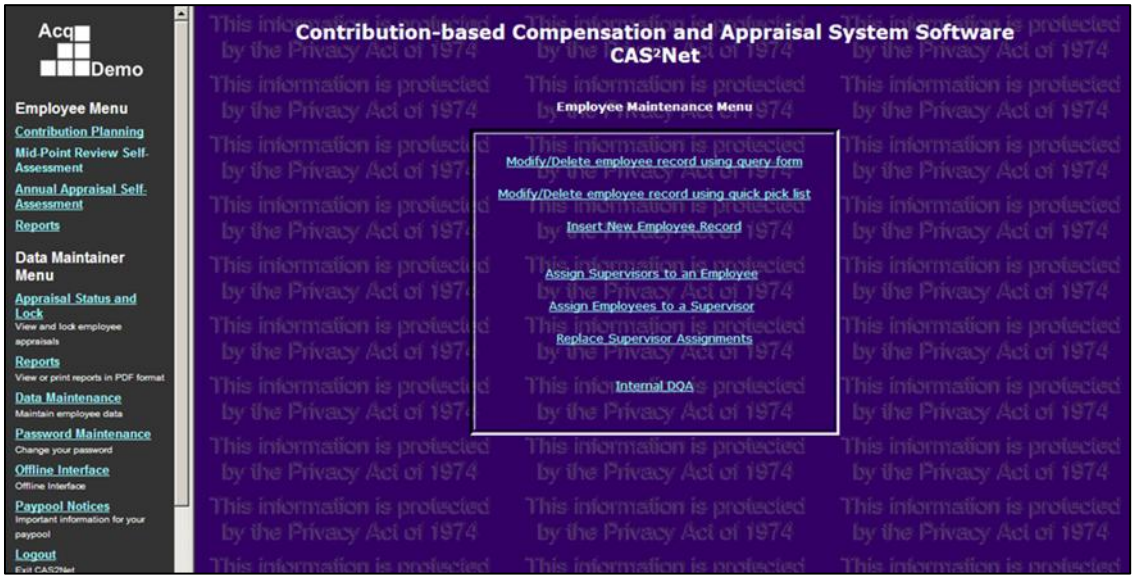


Figure 8-5: Data Maintenance – Employee Maintenance Menu

Employee Maintenance Menu options include:

- Modify/Delete employee record using query form
- Modify/Delete employee record using quick pick list
- Insert New Employee Record
- Assign Supervisors to an Employee
- Assign Employees to a Supervisor
- Replace Supervisor Assignments

8.3.1 Create Employee Record

CAS2Net provides two navigation paths to the "Add an Employee Record" web page.

1. Select "Insert New Employee Record" from the Data Maintenance "Employee Maintenance Menu"
2. Click the "Add an Employee Record" link on the "Employee Picklists by Career Path" screen.

The "Add an Employee Record" page contains fields for all data elements stored in the database. Four data elements are mandatory for the creation of a new non-demo record (SSN, first name, last name, and occupational series) – the labels on these fields are highlighted in yellow.

When all data is entered, scroll to the bottom of the screen and click the "Add" button. The only non-demo employees who need to be entered into the database are CAS2Net users: data maintainers and paypool superusers.

The Data Maintainer would use this function to create records for employees joining the paypool during the post-cycle period, which runs from 1 October through early January.

ADD EMPLOYEE RECORD WEB FORM

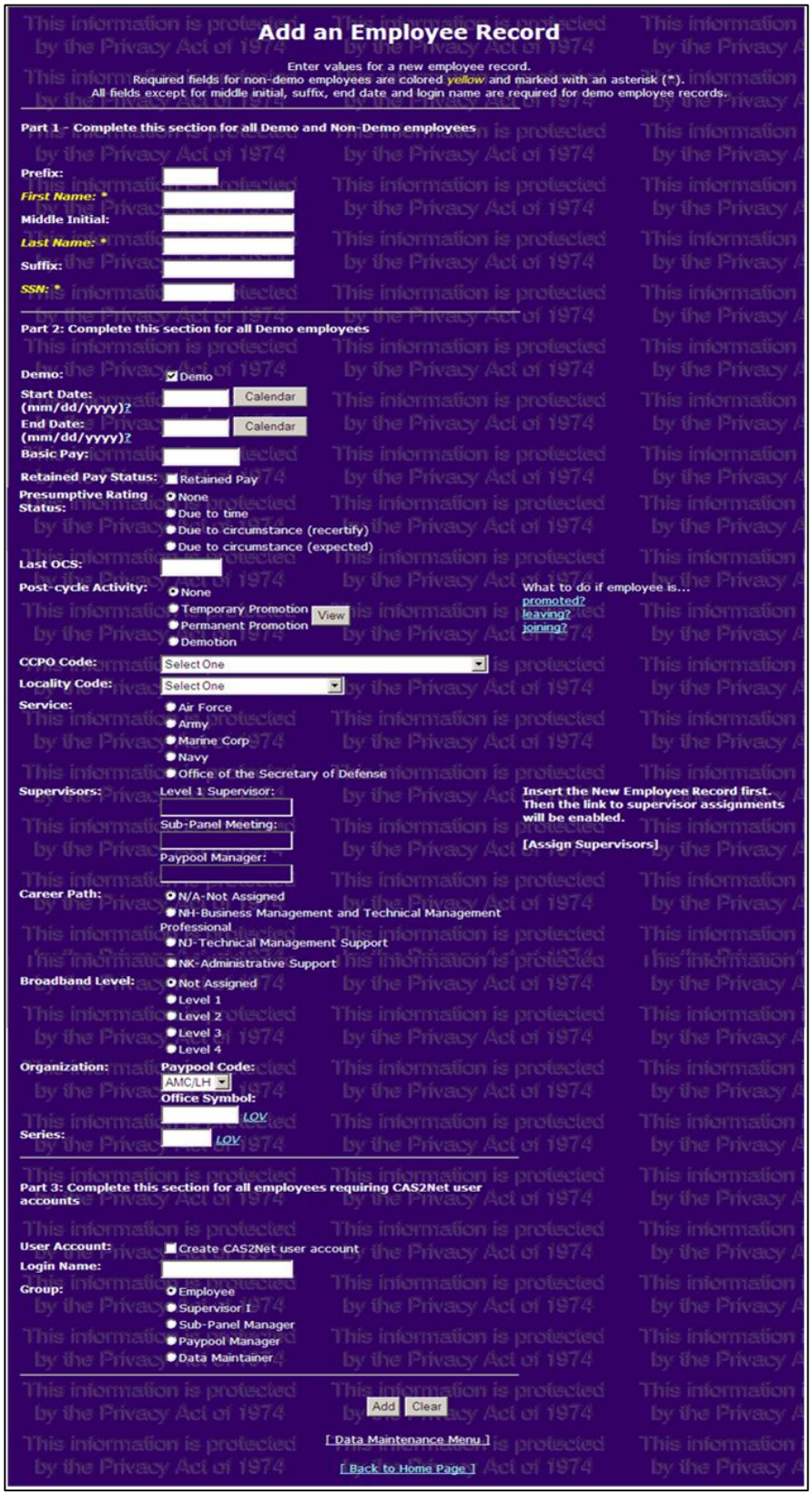


Figure 8-6: Add Employee Record Web Form

8.3.2 Modify/Delete Employee Record

CAS2Net offers two menu items for locating the employee record to be modified.

The first option, "Modify/Delete employee record using query form", lets the Data Maintainer enter search criteria to locate employees with given attributes.

The second, "Modify/Delete employee using quick pick list", lets the Data Maintainer search for employees by career paths.

Using Query Form: This method takes you through a query screen in which you can enter information about the employee record(s) you want to modify or delete – entering SSN is the most direct way to get exactly the record you want. If you enter more general criteria, such as broadband and career path, you will get a list of all employees in the database matching those criteria. You may use the % symbol as a wild card in your queries.

After you enter the query criteria, scroll to the bottom of the screen and select the order in which you want the records sorted (optional), and then click the "Find" button. The query form is shown on the following page.

SEARCH EMPLOYEE QUERY FORM

Figure 8-7: Search Employee Record Query Form

Enter one or more search criteria and click “Find”.

The query produces a list of records that match the query criteria as shown below. The records are displayed in groups of ten. You can then select a specific employee from the resulting list (shown below) by clicking on the employee’s ID link.

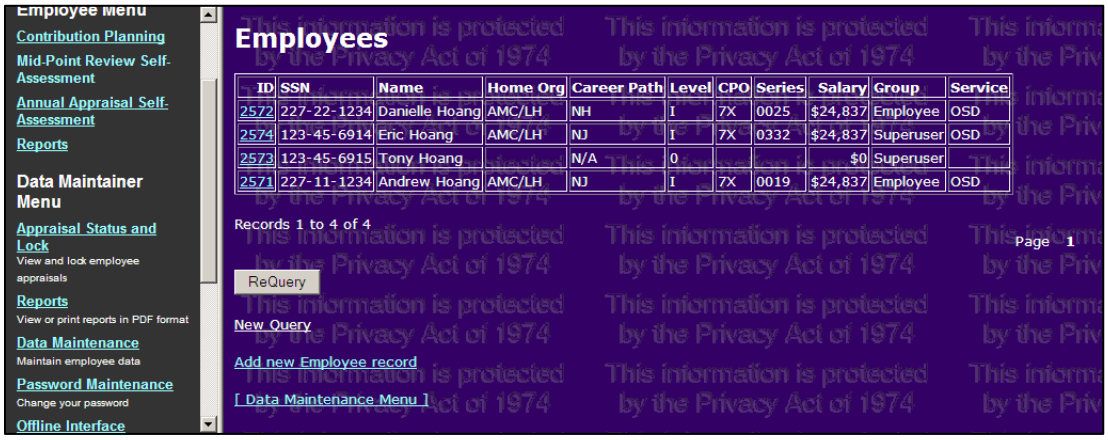


Figure 8-8: Search Employee Record Query Results

Using quick pick list: The second search option, “Modify/Delete employee using quick pick list”, lets the Data Maintainer search for employees by career paths.

Figure 8-9: Modify/Delete Employee Record Using Quick Pick List

This method takes you through a screen to pick employees by selecting from dropdown lists from each career path. Select an employee from one of the dropdown lists then click on the "submit" button.

When an employee is selected from either search screen, CAS2Net displays the Employee Detail form for updating or deleting AcqDemo employee information.

EMPLOYEE DETAIL WEB FORM

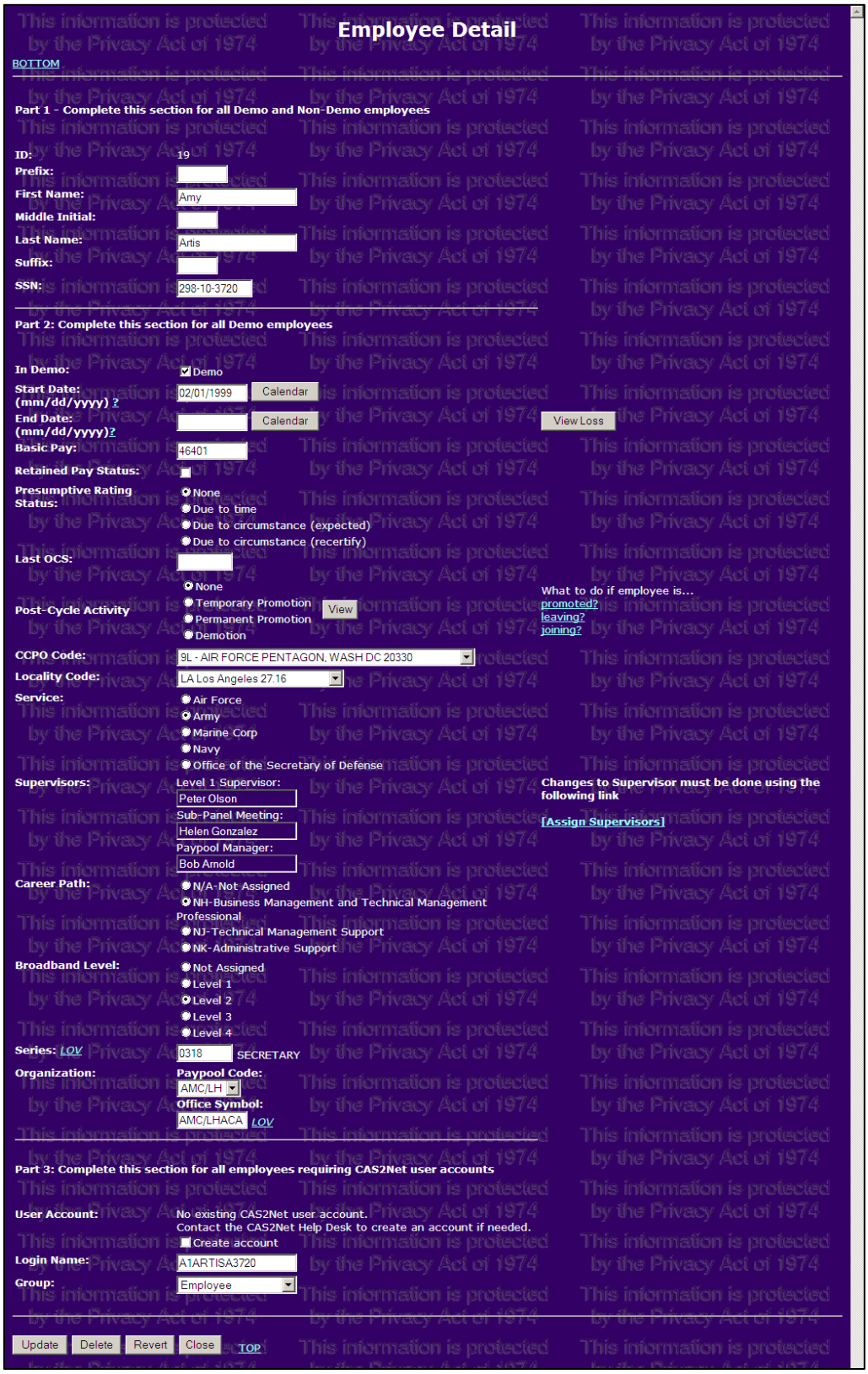


Figure 8-10: Employee Detail Web Form

You will have to scroll up and down to see all of the data fields. The following data elements are open for direct entry or modification:

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

First Name
Middle Initial
Last Name
Suffix
SSN

Part 2: Complete this section for all Demo employees

Start Date (date entered Acq Demo)
End Date (date departed Acq Demo)
Current Fiscal Year Base Pay (does NOT include locality pay)
Last Year's OCS (if available)
Supervisor Names (Level 1 Supervisor, Managers Meeting, and Pay pool Manager)
Office Symbol
Occupational Series
7 Wild Card Column Entries (do not use, these come from the CCAS spreadsheet)
2 Supervisor Names for Part 1 of the Appraisal Form (from the CCAS spreadsheet)
Comments for Part 1 of the Appraisal Form (from the CCAS spreadsheet)

Part 3: Complete this section for all employees requiring CAS2Net user accounts

Login Name

The following data elements may be changed only by selecting from dropdown lists, check boxes, or radio buttons:

Part 1: Complete this section for all Demo and Non-Demo employees	
Prefix (not used)	*Dropdown List*
Part 2: Complete this section for all Demo employees	
In Demo Flag	*Check Box*
Retained Pay Status	*Check Box*
Presumptive Rating Status	*Radio Buttons*
Temporary/Permanent Promotion (during the post-cycle period)	*Radio Buttons*
Servicing CCPO Code	*Dropdown List*
Locality Code	*Dropdown List*
Service	*Radio Buttons*
Broadband Level	*Radio Buttons*
Pay pool Code	*Dropdown List*
Career Path	*Radio Buttons*
Part 3: Complete this section for all employees requiring CAS2Net user accounts	
Group (employee, supervisor, etc.)	*Dropdown List*

Supervisor Names, Office Symbol, and Occupational Series (Number and Title) may be changed by either typing in a value or selecting from a list of values. Click the LOV link to select from the list of values. New values entered for Supervisor Names and Office Symbol will be added to the list of values once the employee record is updated.

Given the long list of Occupational Series, you will be prompted to enter a search criterion when you click on the LOV link for Series. You may use the % symbol as a wild card in your search. For example, entering"3%" for the search criterion will return all Series with a 3 in it (see below). You may update the search criterion and click the "Find" button or click on a Series ID link to select the value.

When changes are complete, scroll to the bottom of the screen and click the “Update” button to save the changes to the CAS2Net database. If you want to delete the employee from the database, click the “Delete” button. If you have made changes, but want to revert back to the previous values (before clicking the “Update” button), click the “Revert” button.

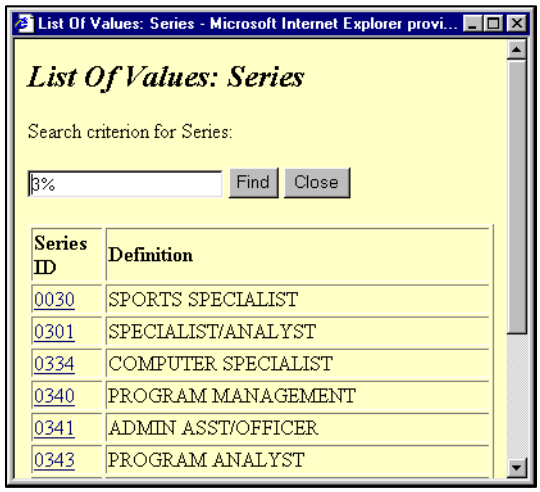


Figure 8-11: Occupational Series “List of Values”

Unlike other screens in CAS2Net, you cannot “Back” out of the Employee Detail screen. To exit the screen and return to the list of employees, click the “Close” button at the bottom of the screen.

8.3.3 Transfer Paypool

To move an employee from one paypool to another, use the "Transfer Paypool" feature.

Start by clicking "Data Maintenance" from the navigation bar.

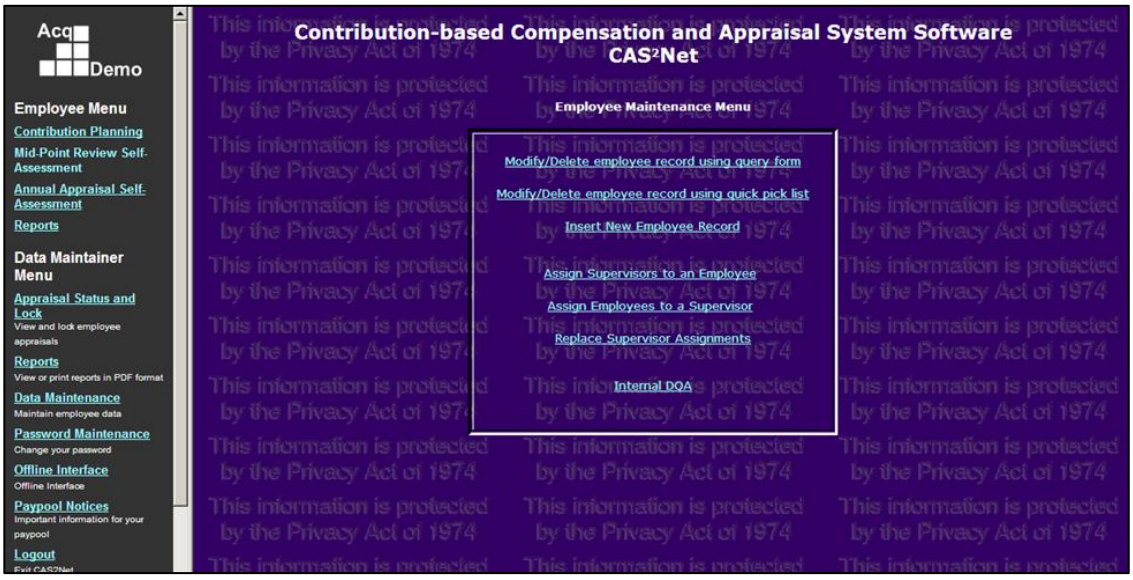


Figure 8-12: Transfer Paypool – Data Maintenance Menu

Select the "Modify/Delete employee record using query form" link.

CAS2Net refreshes the screen to display the "Look for Employee(s)" search screen.

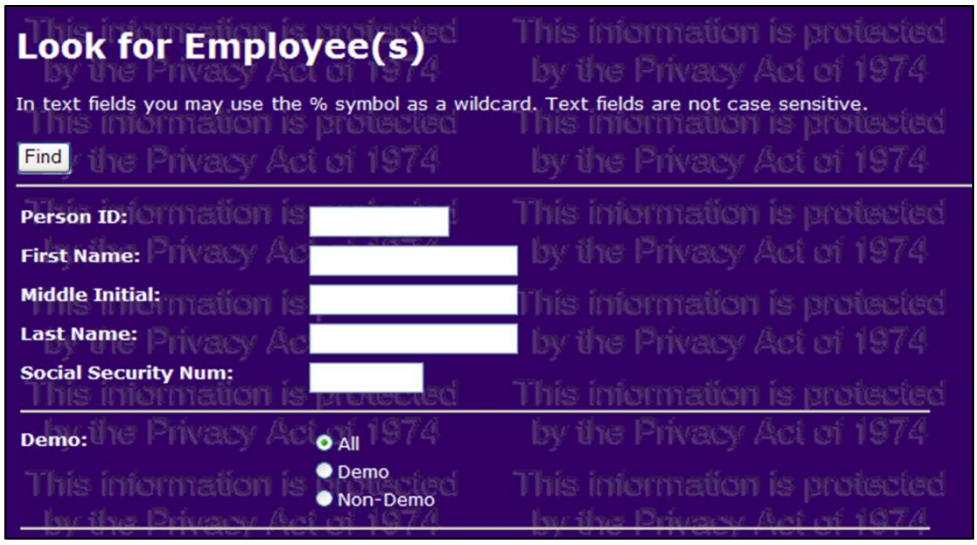


Figure 8-13: Transfer Paypool – Employee Search Query Form

Enter the name of the employee you want to find.

Scroll to the "Organization" section of the form and select "(transfer)" from the "Paypool Code" dropdown list.

Figure 8-14: Transfer Paypool – Search by "From" Paypool

Click the "Find" button (located at the top and/or bottom of the screen).

Figure 8-15: Transfer Paypool – Employee Search "Find" buttons

CAS2Net refreshes the screen to display a list of employees in the transfer paypool. (This means the employee is waiting to be put into a paypool and be given supervisor assignments)

Select an employee you would like to modify by clicking on their "ID" number.

If you entered a name to search for, only people with that name will be displayed.

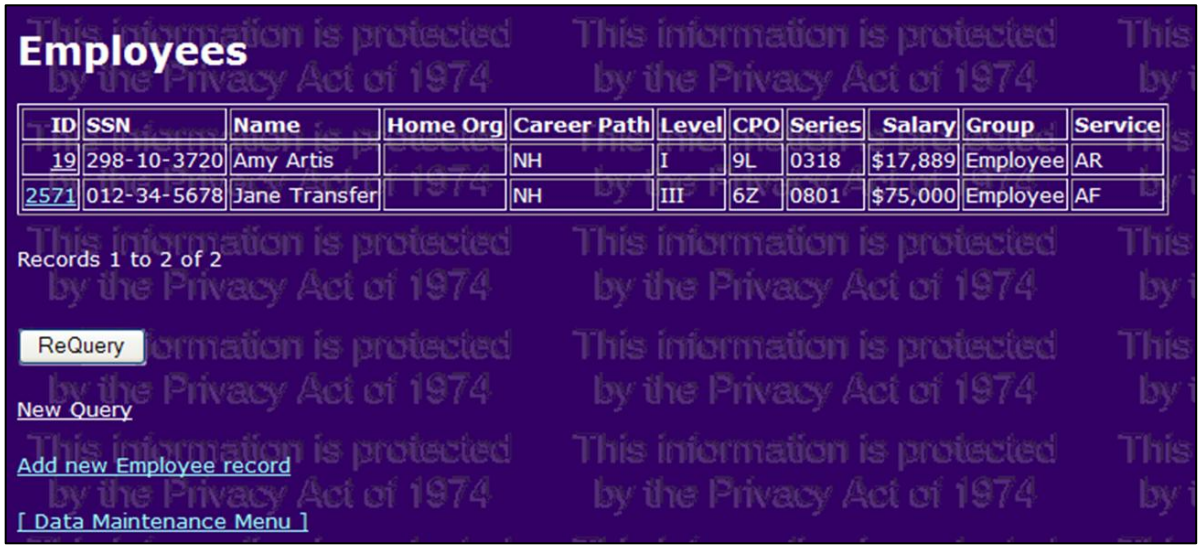


Figure 8-16: Transfer Paypool – Search Results

CAS2Net opens a new internet browser window to display the Employee Detail Screen for the select employee.

Figure 8-17: Transfer Paypool – Employee Detail Input

Scroll down to the "Organization" section of the Employee Detail Form and select the "Paypool Code" dropdown list.

Choose the name of the paypool you want to move the selected employee to.

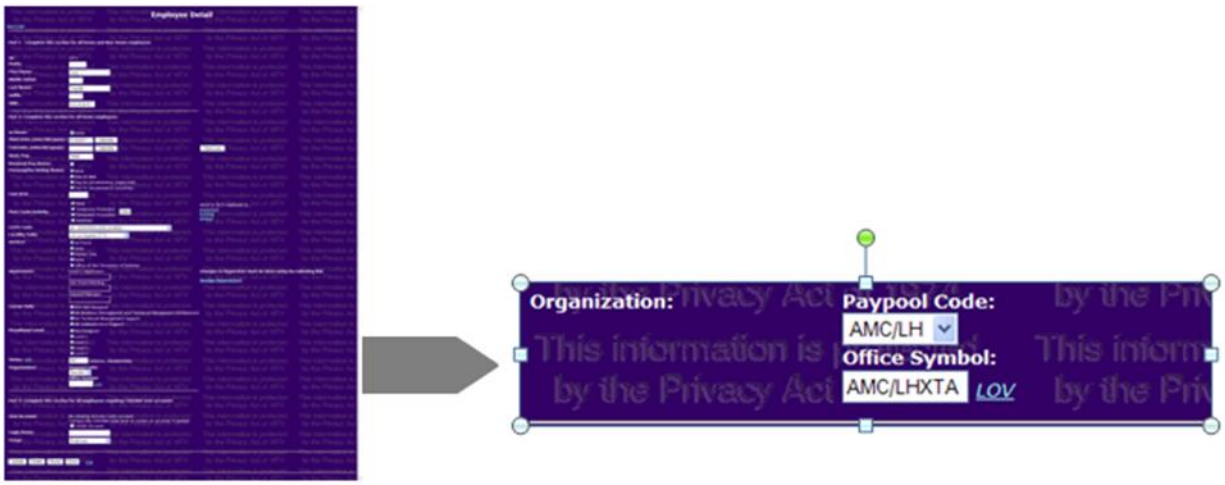


Figure 8-18: Transfer Paypool – "To" Paypool Selection

Click the "Update" button located at the bottom of the screen.

CAS2Net displays a message at the top of the Employee Detail screen indicating successful updates.

Click the "Close" button at the bottom of the Employee Detail Screen.

> **Tip: Generate the Employee Roster report from time to time to check your progress in cleaning up the paypool database.**

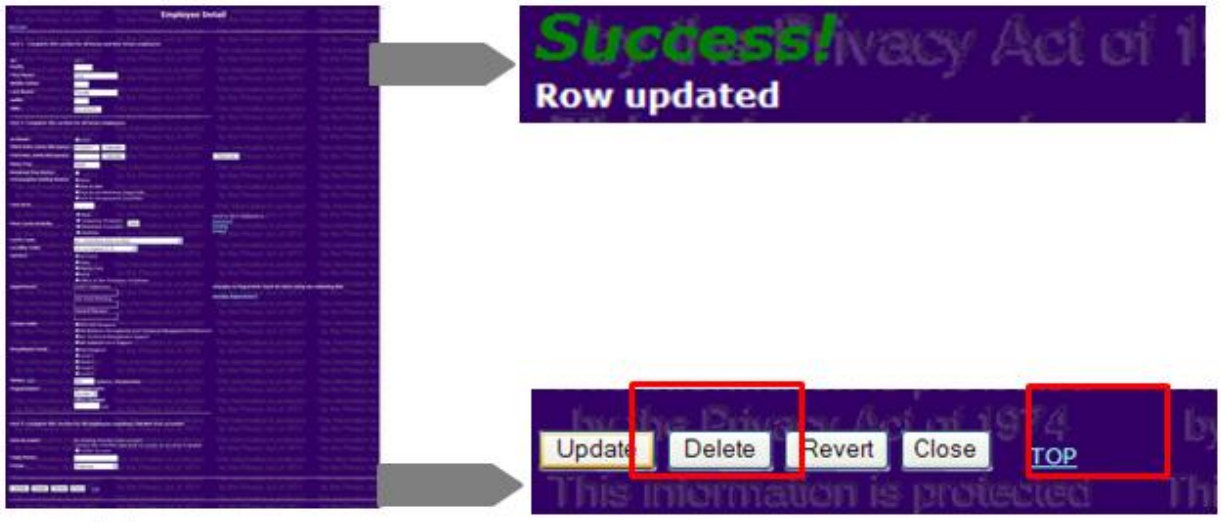


Figure 8-19: Transfer Paypool – Employee Detail Update

8.3.4 Record Post-Cycle Activities

Another very important function of the Data Maintainer is recording post-cycle activities. Post-cycle activities include all gains, losses, and temporary and permanent promotions occurring between 1 October 2001 and early January. These activities are recorded using the Data Maintenance – Employee Maintenance path from the Main Menu.

Post-cycle **losses** are recorded by following Path (1) to the Employee Detail screen and entering an End Date during the post-cycle period for the employee. Post-cycle **gains** are recorded by following Path (2) and then filling in all of the normal data elements, including a Start Date during the post-cycle period. Note that post-cycle gains and losses are only entered for employees leaving or joining AcqDemo during the post-cycle period. Transfers between paypools are NOT considered gains or losses.

Post-cycle **promotions** are recorded by following Path (1) to the Employee Detail screen and then selecting the appropriate promotion radio button under "Temp/Perm Promotion". Once you have selected the type of promotion, click the "View" button and enter the requested information. Don't forget to save your changes. The post-cycle data form for temporary promotions is shown below.

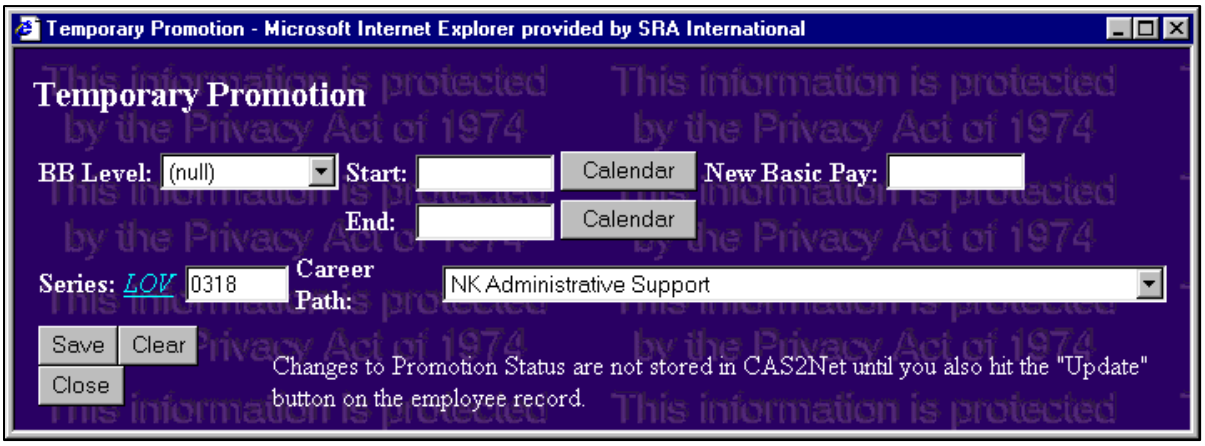


Figure 8-20: Temporary Promotion Web Form

Note that once you enter the promotion data and click the "Save" button, you have still not physically updated the CAS2Net database. That will not happen until you get to the end of the Employee Detail screen and click the "Update" button.

8.3.5 Create Supervisory Structure; Obtain CAC EDIPI

Make sure you have added all non-demo supervisors and have assigned them the highest supervisory user role they will have:

- Paypool Manager (PPM) is highest (note that each paypool can have only one PPM)
- Sub-Panel Manager also called Supervisor 2 is the next highest
- Supervisor 1 is the lowest level of supervisor

Note each level of supervisor can also act as lower levels of supervisor

- PPM can be assigned as Sub-Panel Manager and Supervisor 1
- Sub-Panel Manager can be assigned as Supervisor 1
- You create your own sub-panels or sub-paypools when you assign Sub-Panel Managers. You will be able to download these into the Sub-Panel version of the CCAS spreadsheet, which allows the sub-panel to review ratings, but does not allow them to assign payouts.

Make sure that you have created records for all non-demo supervisors and have assigned all supervisor roles before assigning supervisors to an employee or employees to a supervisor

Note: You will need to obtain the Social Security Number and Common Access Card (CAC) Electronic Data Interchange Personnel Identifier (EDIPI) for each non-demo user

OBTAINING CAC EDIPI

The following steps can used by the employee to find his EDIPI.

1. Open ActivClient:
2. Double-click the ActivClient icon in your Windows system tray

Figure 8-21: Windows ActivClient Icon

10 digit EDIPI follows name in the title bar, but cannot be copied.

3. Double-click “Smart Card Info” icon.

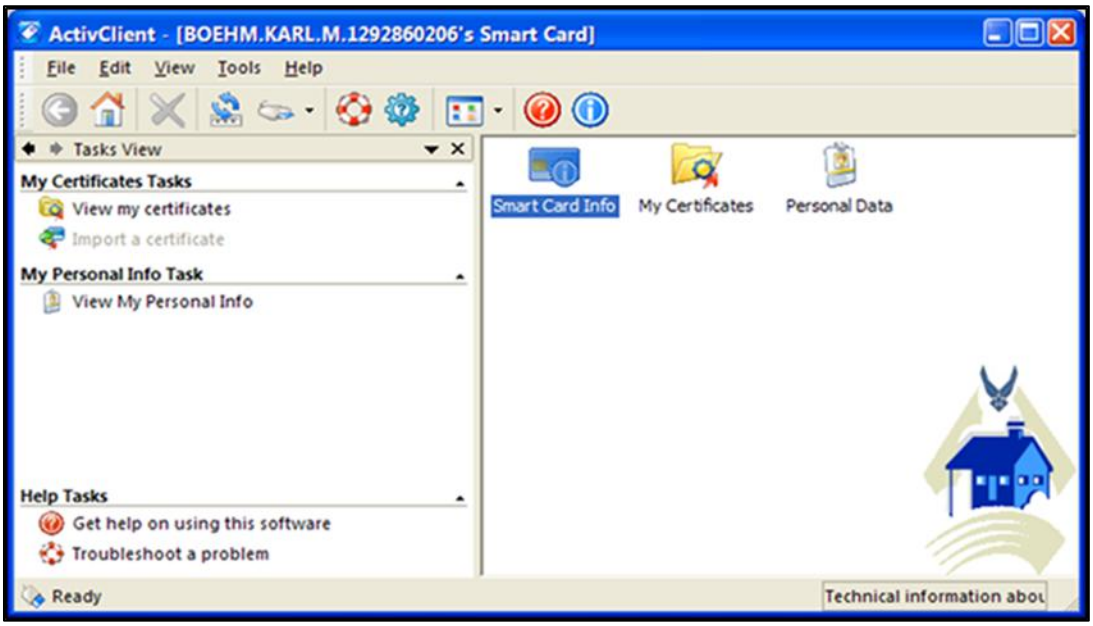


Figure 8-22: Smart Card Info Icon

10 digit EDIPI located in the User Name field, and can be copied

4. Copy and send to Data Maintainer to establish account

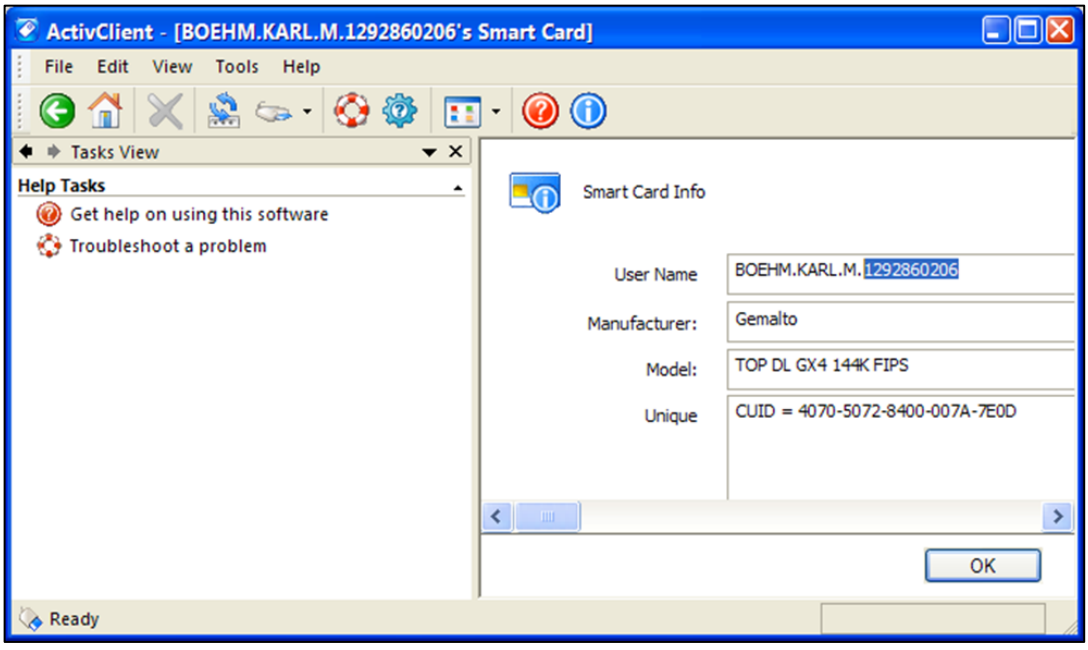


Figure 8-23: Smart Card Information Screen

CREATE NEW EMPLOYEE RECORD: NON-DEMO EMPLOYEE

Once you have the SSN and EDIPI, click "Data Maintenance" from the navigation bar. CAS2Net refreshes the screen to display the Employee Maintenance Menu.

Select the "Insert New Employee Record" link.

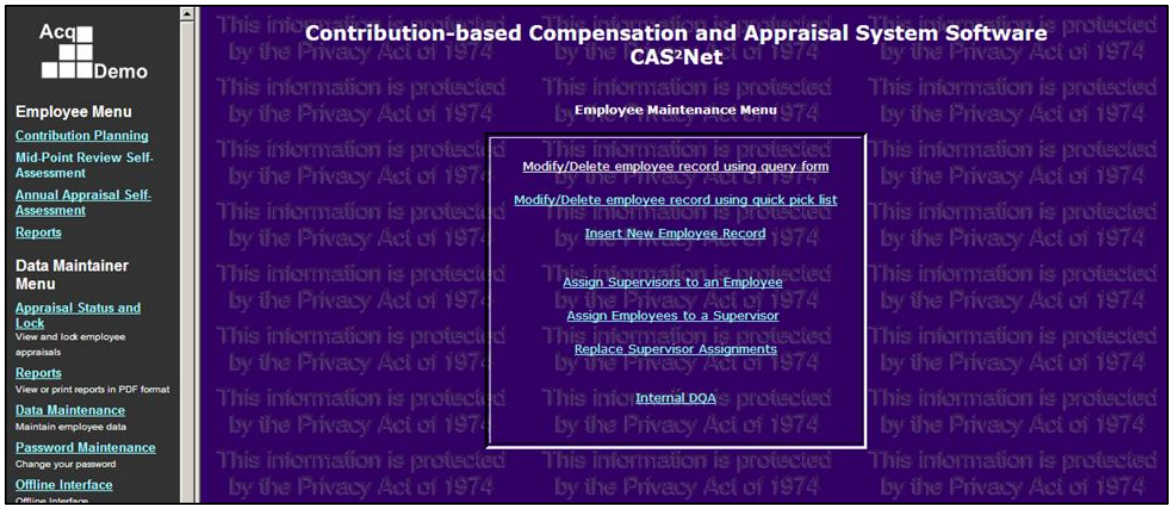


Figure 8-24: Insert New Employee Record Link

- CAS2Net displays the Add an Employee Record screen.
- In Part 1 of the form:
  - Enter the ***first*** and ***last name*** along with the ***Social Security Number*** of the employee being added.

The fields in yellow are mandatory

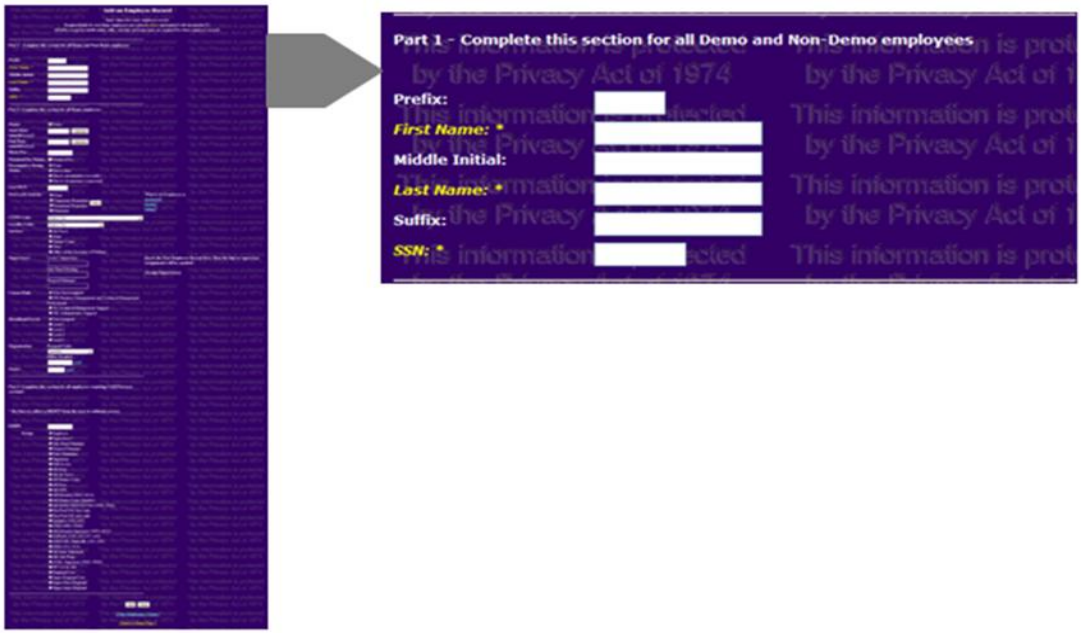


Figure 8-25: Add Employee Record – Part 1

In Part 2 of the form:

- Click the "Demo" checkbox to Uncheck and make the employee Non-Demo.
- Scroll to the "Organization" section of the form to the "Paypool Code" dropdown list. Select the paypool name in which you want to put your employee into.

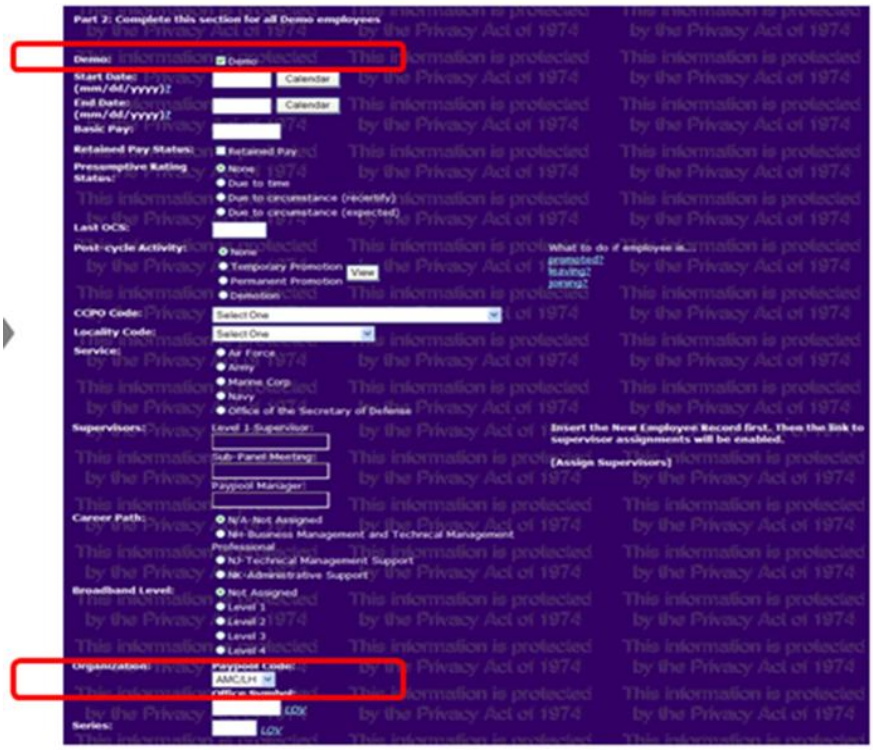


Figure 8-26: Add Employee Record – Part 2

In Part 3 of the form:

- Enter the user's EDIPI in the provided text box.
- Select radio button for desired User Group.
- Click the "Add" button at the bottom of the screen.

Figure 8-27: Add Employee Record – Part 3

CAS2Net refreshes the screen to display a successful update.
Confirms:

- The employee has been successfully inserted
- Employee's ID number
- SSN
- Name

Figure 8-28: Add Employee Record Successful

8.3.6 Assign Supervisors to an Employee

To assign supervisors to an employee, click “Data Maintenance” from the navigation bar.

CAS2Net refreshes the screen to display the Employee Maintenance Menu.

Select the “Assign Supervisors to an Employee” link.

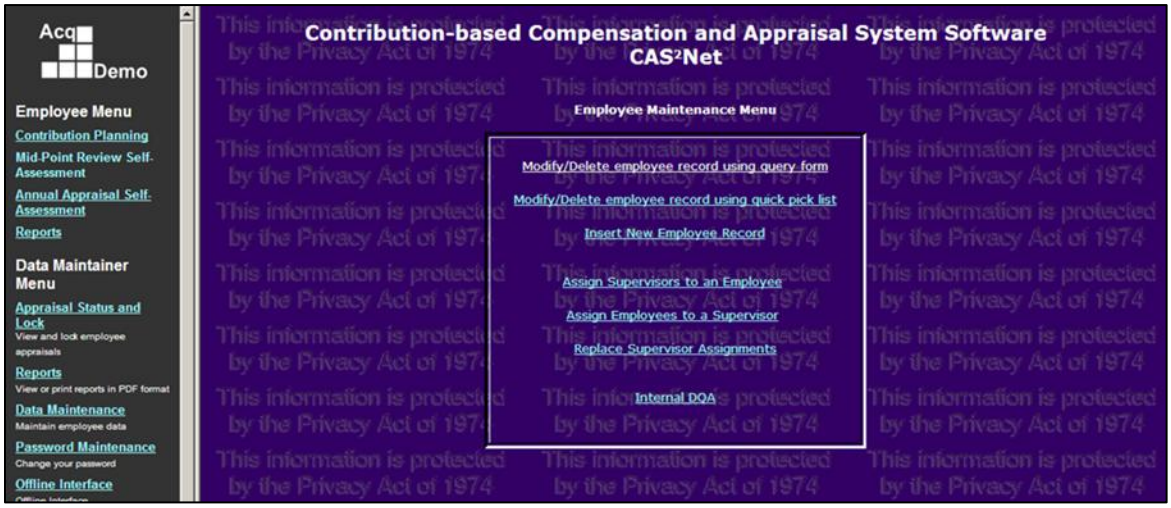


Figure 8-29: Assign Supervisors to an Employee Link

The Assign Supervisor to an Employee screen is displayed.

Select an employee’s name from the dropdown list.

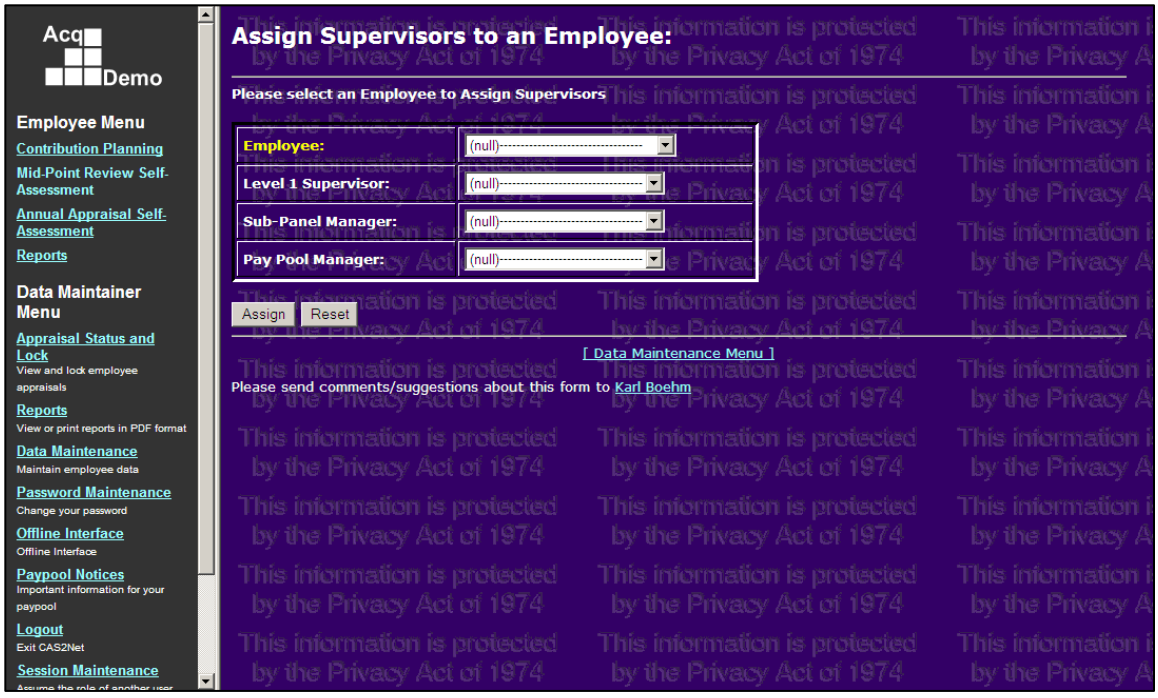


Figure 8-30: Assign Supervisors to an Employee Web Form

CAS2Net refreshes the supervisor dropdown lists to display the selected employee’s current supervisors.

Select the desired supervisors to assign to the selected employee using the provided dropdown lists.

To undo selections made, and view the current supervisor assignments, click the "Reset" button.

Select the desired supervisors to assign to the selected employee and click the "Assign" button.

Figure 8-31: Assign Supervisors to an Employee – Supervisor Selection

Once you click the "Assign" button, CAS2Net displays the following message : "Supervisor(s) successfully assigned."

If no supervisor assignments have been changed and the "Assign" button is clicked, the following message is displayed: "No supervisor changes made."

Note that above paypool superusers need to assign supervisors who are in a different paypool than the employee using this module.

Figure 8-32: Assign Supervisors to an Employee Successful

8.3.7 Assign Employees to Supervisor

To assign employees to a supervisor, click "Data Maintenance" from the navigation bar.

CAS2Net refreshes the screen to display the Employee Maintenance Menu.

Select the "Assign Employees to a Supervisor" link.

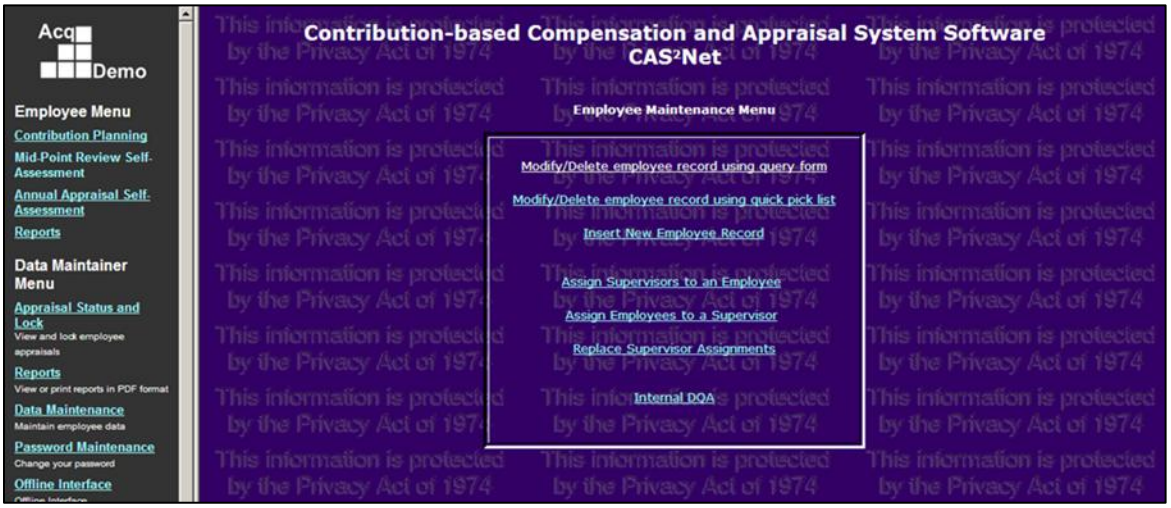


Figure 8-33: Assign Employees to Supervisor Link

The Assign Employees to a Supervisor screen is displayed.

Select a supervisor name from the dropdown list and select the supervisor role you want to assign (first level, sub-panel, or paypool manager).

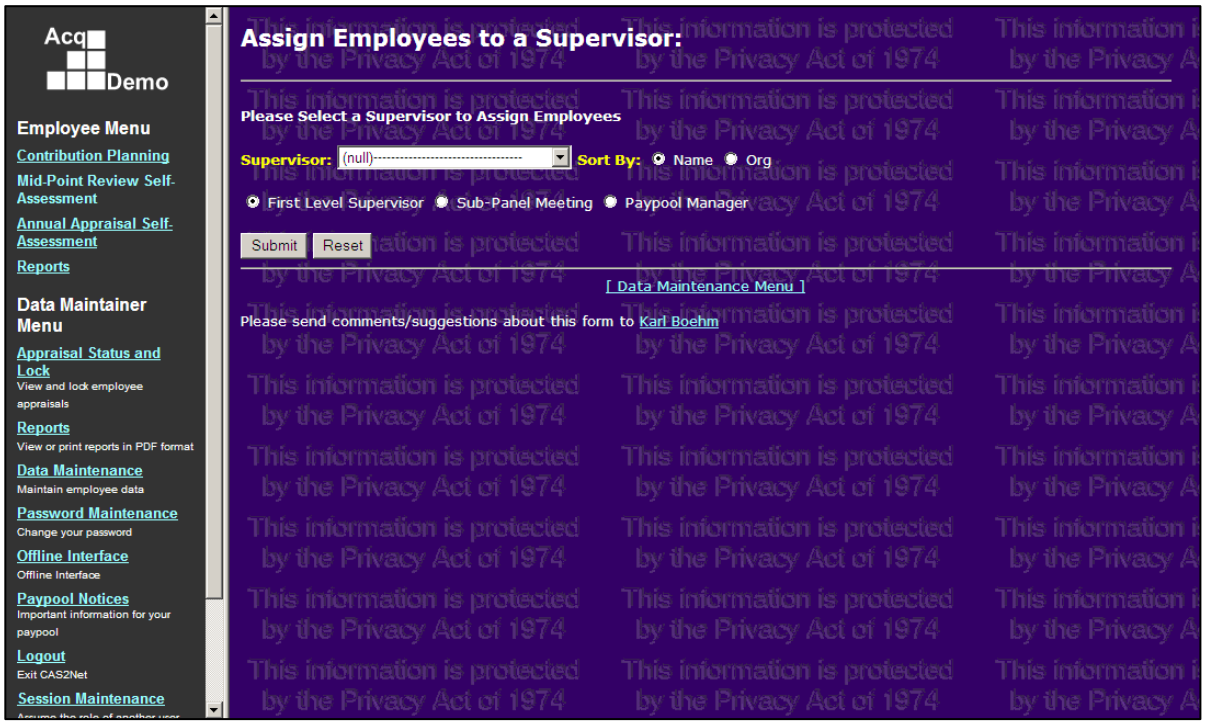


Figure 8-34: Assign Employees to Supervisor – Supervisor Selection

CAS2Net refreshes the screen to display a list of employees reporting to the selected supervisor.

Note: to view employees under the selected supervisor in a different level of supervision, select the desired radio button.

To sort the list of employees by Name or Organization, select the "Name" or "Org" radio button.

Click the check boxes next to employee name(s) of those employee(s) you want to assign to the selected supervisor. To assign all employees listed, click the "Check/Uncheck All" checkbox.

To undo selections click the "Reset" button.

To submit selections, click the "Submit" button.

Figure 8-35: Assign Employees to Supervisor – Employees Selection

Verify the selected employees have been assigned to the supervisor.

Repeat for each supervisory role held by the selected supervisor by clicking on each of the levels of supervisor radio buttons.

8.3.8 Replace Supervisor Assignments

To assign employees to a supervisors, click “Data Maintenance” from the navigation bar.

CAS2Net refreshes the screen to display the Employee Maintenance Menu.

Select the “Replace Supervisor Assignments” link. Use this option when a supervisor is replaced by another person.

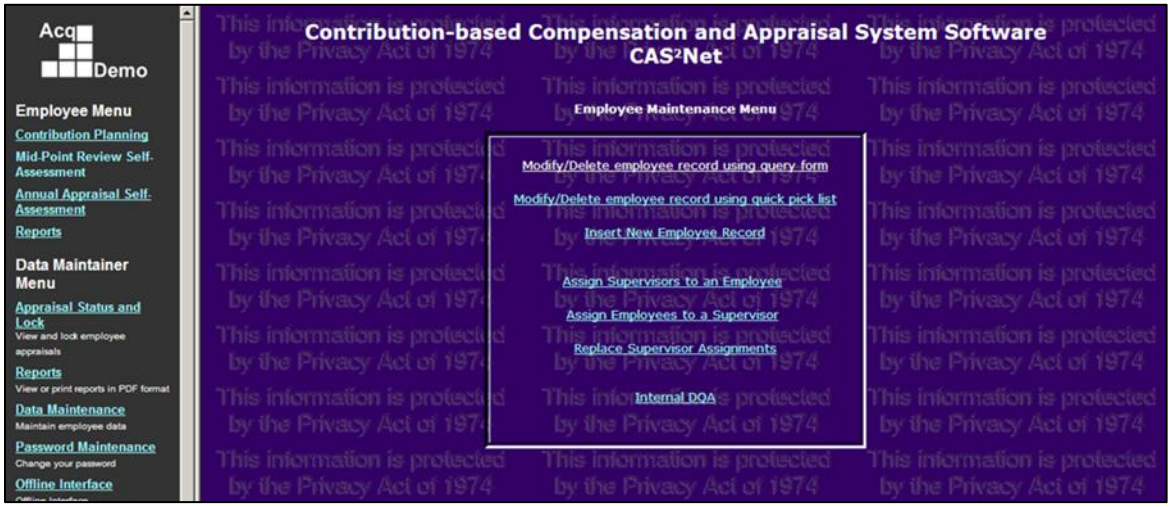


Figure 8-36: Replace Supervisor Assignments Link

The Replace Supervisor Assignments screen is displayed.

Select a supervisor name from the “Original Supervisor” dropdown list.

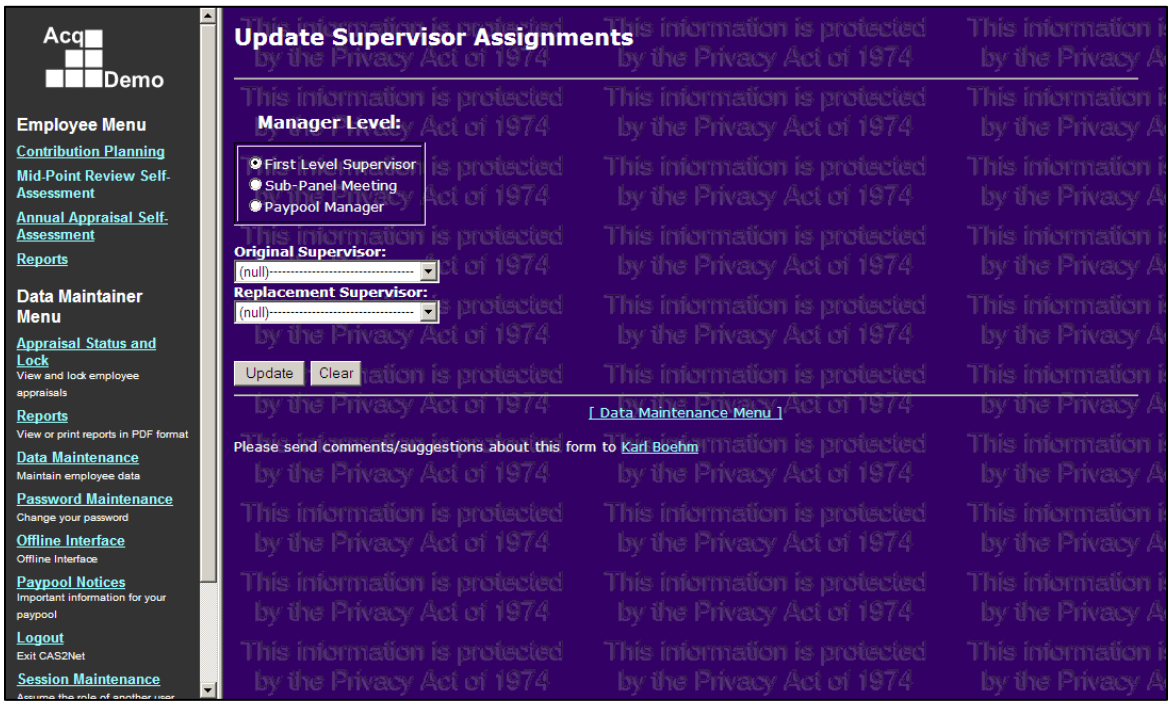


Figure 8-37: Update Supervisor Assignments – Supervisor Selection

Click the associated radio button to select the level of supervision you want to replace assignments for the selected supervisor.

Select the name of the supervisor you want to replace assignments with from the "Replacement Supervisor" dropdown.

To clear selections, click the "Clear" button.

To submit changes, click the "Update" button.

Figure 8-38: Replace Supervisor Assignments – Update

CAS2Net displays a message indicating the number of successful replacements between the two selected supervisors.

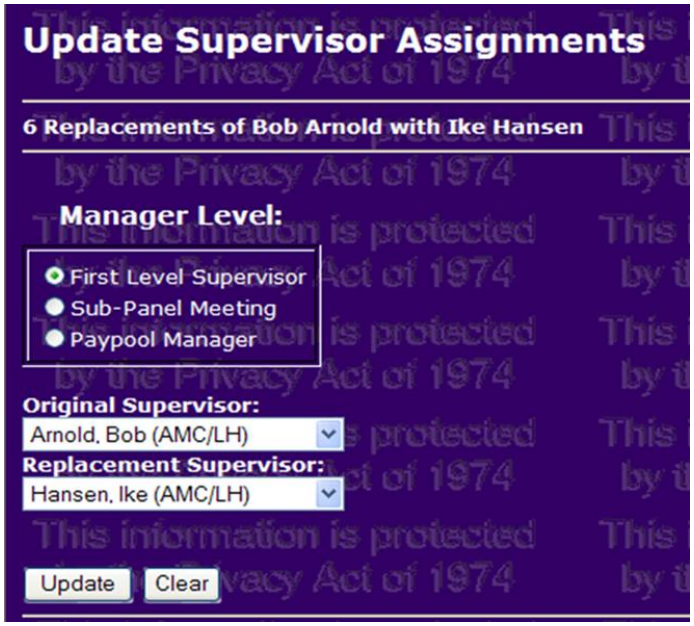


Figure 8-39: Replace Supervisor Assignments Successful

8.4 Offline Interface

The "Offline Interface" enables the Data Maintainer to transfer paypool information to and from the CCAS Spreadsheet for Paypool Panel evaluation.

Click "Offline Interface" in the Data Maintainer Menu of the left side navigation bar. CAS2Net displays the Offline Interface menu.

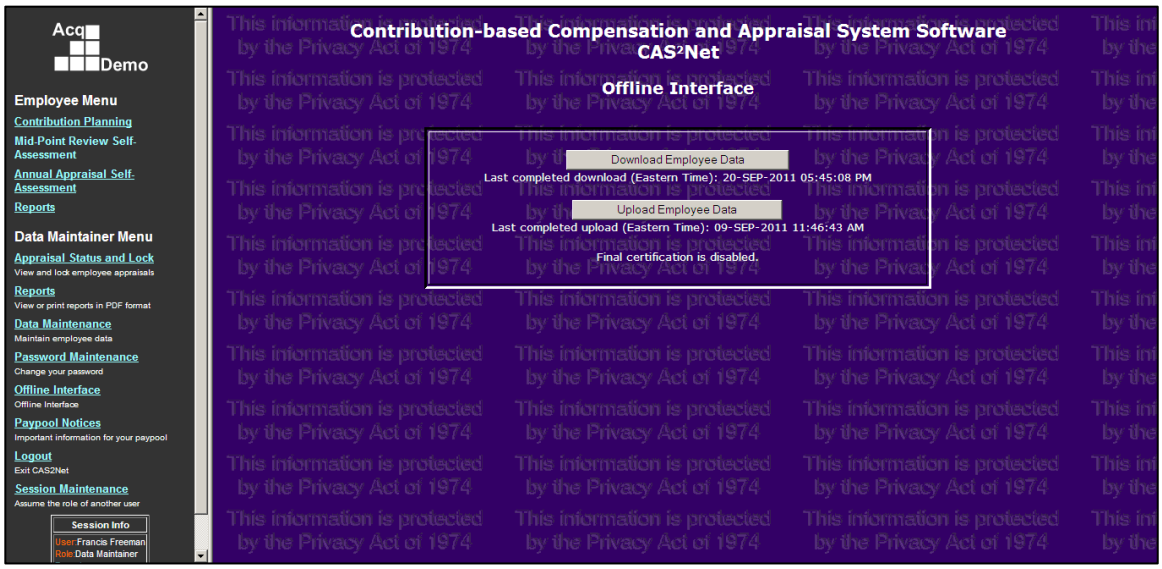


Figure 8-40: Offline Interface Menu

8.4.1 Download Employee Data

When the CAS2Net database includes all of the AcqDemo employees in your paypool, and all of the data elements have been reviewed and corrected, you are ready to export files for use in the CCAS spreadsheet. You have two methods for doing this, depending on how your paypool plans to use the spreadsheet.

Method 1: Some paypools prefer to have only one spreadsheet containing all employees, into which all factor scores can be entered. These paypools can either use the same spreadsheet, filtered by managers meeting, to sequentially record scores from each meeting, or can capture the results of the various meetings on paper and then transcribe them into the spreadsheet. To generate a single export file containing all paypool employees, click on the Offline Interface link on the Main Menu, then click the Download Employee Data button, and then select the file named "PPxxx_to_CCAS.csv". Follow the instructions on the screen for downloading the file (the procedure depends on which browser you are using). Point to where on your hard drive you want the file saved, click the "Save" button and you are done.

Method 2: Other paypools prefer to have a separate spreadsheet for each of their managers meetings. To generate these separate files, proceed as in Method 1 above, but when you get to the list of files, select the file named "PPxxx_to_CCAS_name.csv" where "name" is the first manager for whom you want to create a separate file. Continue the download process as in Method 1 above. Repeat this process for each manager. Employees whose records are not reviewed at a managers meeting (i.e., direct reports to the paypool manager) are contained in a file named "PPxxx_to_CCAS_(No Manager).csv".

Click the "Download Employee Data" button to list the data files available for download.

Figure 8-41: Offline Interface – Download Employee Data

Files that are available for downloading are displayed as hyperlinks. A filename shown as ordinary text indicates that the content has been locked. The Data Maintainer can utilize the "Appraisal Status and Lock" functionality to unlock the file.

Click a filename link and follow the Windows "File Download" instructions to "Open" or "Save" the employee data file.

Click "Return to Offline Interface Main Menu" to exit.

8.4.2 Upload Employee Data

The CCAS spreadsheet that managers use to enter scores and adjust compensation does not permit changes to basic personnel information – that can only be done directly on the CAS2Net database using Data Maintenance functions. All personnel data errors discovered after managers start using the spreadsheet must be corrected in the CAS2Net database. A new download file with the corrected data must then be generated for import into the spreadsheet. However, each import into the spreadsheet completely overwrites the information already in the spreadsheet. So managers do not lose any work they have already accomplished in the spreadsheet, the CAS2Net database is designed to upload and download the data elements that managers control in the spreadsheet. Therefore, before using the CAS2Net database to correct errors discovered by a manager, the manager must first export a file from his or her spreadsheet for upload to the database. The exported file will be named ppXXX_to_CAS2Net_name.csv. If the file contains the entire paypool, the manager's name will not be part of the file name.

To upload the file to the CAS2Net database, click on the Offline Interface link on the Main Menu, and then click the Upload Employee Data button. Then, either type in the full name of the file you want to upload, or click the "Browse" button to go find the file.

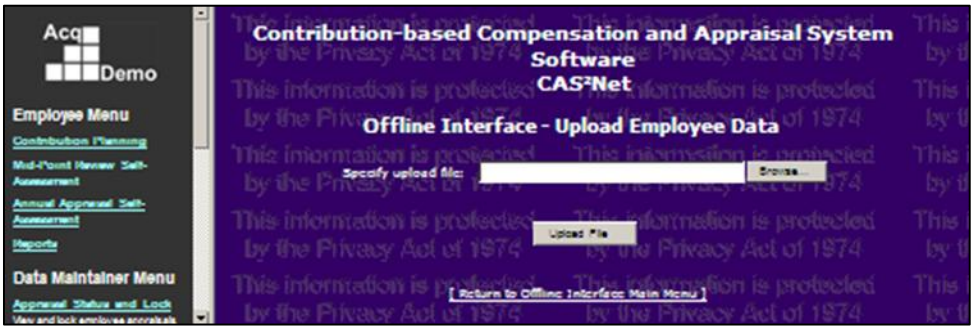


Figure 8-42: Offline Interface – Upload Employee Data

Depending on the version of your web browser, your browse window may be set to look for HTML Files only – use the dropdown list under file type to select "All Files (*.*)". Once you have located and highlighted the file, click "Open" and then click "Upload File". At this point all of the data elements entered into the spreadsheet, such as contribution scores, wild card entries, and pay adjustments, are stored in the CAS2Net database. You can now update personnel information and download and import a new file back into the spreadsheet, which will contain the corrected personnel data as well as all of the spreadsheet data that was stored from the upload. The manager can then proceed on with the CCAS process from where he or she left off without having to re-enter any data.

8.5 Paypool Notices

Select "Paypool Notices" from the Data Maintainer Menu on the left side navigation bar to display a list of available Paypool Notices files.

Figure 8-43: Paypool Notices List

Select a CCAS Spreadsheet from the filename list—e.g. Sub-Panel Meeting [Version #].xls or CCAS [Version #].xls.

Follow the Windows "File Download" instructions to "Open" or "Save" the Excel spreadsheet containing the Paypool Notices.

9. SUPERUSER

This section provides guidance for the CAS2Net Superuser on how to use CAS2Net to oversee paypool operations.

If the Superuser is also a "demo" employee, then the following "Employee Menu" options will appear in the upper portion of the navigation bar: **Contribution Planning**, **Mid-Point Review Self-Assessment**, **Annual Appraisal Self-Assessment**, and **Reports**.

Refer to Section "4. Employee" for information relating to the Employee Menu features.

When the Superuser has responsibility for rating the performance of direct reports, then the following supervisor options will appear at the top of the Data Maintainer Menu in the navigation bar: **Contribution Planning**, **Additional Feedback**, **Mid-Point Review**, and **Annual Appraisal.** These features are detailed in Section "5. Level 1 Supervisor".

The following options appear in the Superuser navigation bar after you have successfully logged in: **Appraisal Status and Lock**, **Reports**, **Data Maintenance**, **Offline Interface**, **Paypool Notices**, **Session Maintenance**, **Password Maintenance** and **Logout**.

- **Appraisal Status and Lock** summarizes the appraisal status of employees in the assigned paypool by supervisor level; provides the capability to drill down by supervisor to list employee details; and locks or unlocks appraisals by sub-panel manager or for the entire paypool.

  Refer to Section "8.1 Appraisal Status and Lock" for more information about this feature.

- The **Reports** option provides the capability to generate reports that list employees, appraisal status, assessments, etc.

- **Data Maintenance** provides maintenance tools for creating or updating employee records; supports assignment of one or more employees to the Level 1 Supervisor, Level 2 Supervisor, Sub-Panel Manager, or Paypool Manager of your assigned paypool; provides the capability to assign one or more supervisors to an employee in your assigned paypool.

  Refer to Section "8.3 Data Maintenance" for information relating to data maintenance functions.

- The **Offline Interface** option provides tools for selecting a paypool or sub-panel employee data file to "Download Employee Data" or "Upload Employee Data".

  Section "8.4 Offline Maintenance" describes the CAS2Net to CCAS Spreadsheet "Offline Interface".

- The **Paypool Notices** option provides the capability to generate Employee Notice documents detailing individual payout information.

  Refer to Section "8.5 Paypool Notices" for information on this feature.

- The **Session Maintenance** option provides the capability to assume the role assigned to another CAS2NET user in your paypool for the purpose of executing his responsibilities in his absence.

9.1 Reports

Click “Reports” in the Superuser Menu of the navigation bar to display the Superuser Reports menu.

CAS2Net displays the following report options for the Superuser.

- CAS2Net Status Report
- Appraisal Form Part II By Employee
- Appraisal Form Part II By Supervisor
- Appraisal Status Report
- Download Employee Data
- Employee Roster
- Post-Cycle Activity Report
- Supervisor Roster By Employee
- Supervisor Roster By Supervisor
- Zone A/CIP Report

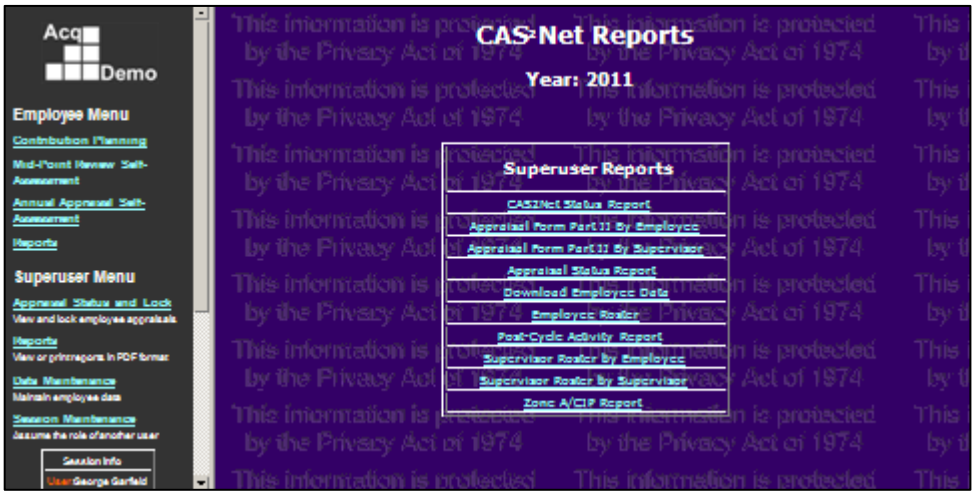


Figure 9-1: Superuser Reports Menu

Section “10.2 Supervisor Reports” provides samples of CAS2Net reports.

9.2 Session Maintenance

This section describes how the system users change and assume the role of another user.

1. Log in as Superuser or Full Access User.
2. Click on "Session Maintenance – Assume the role of another user".
3. CAS2Net displays Session Maintenance screen, includes:
   - User Group: Group of organizations, or roles such as Supervisor Level 1, Supervisor Level 2, Paypool Manager, Data Maintainer, etc….
   - Selection: displays a dropdown list which contains the supervisors' names for each User Group.
   - "Change to selected" buttons.

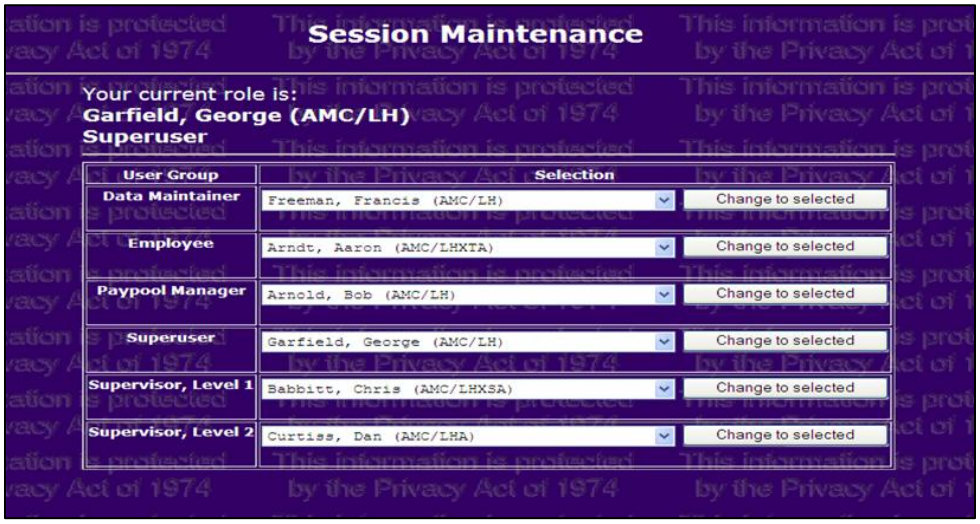


Figure 9-2: Session Maintenance Screen

4. Select a role and name from the dropdown list that you wish to assume the role, and then click "Change to selected" button.
5. CAS2Net displays:
   - The current role shown as the name and role of the assumed supervisor.
   - A "Revert To Self" button.
   - The appropriate menu options in the left navigation bar for the selected supervisor and role.
   - Options to switch to different roles within the organization the assumed.

Note: When CAS2Net changes the current role to the selected name and role, the menu options also changed. The example here shows the assumed supervisor is "Supervisor, Level 1", the left navigation bar shows all options belong to that role:

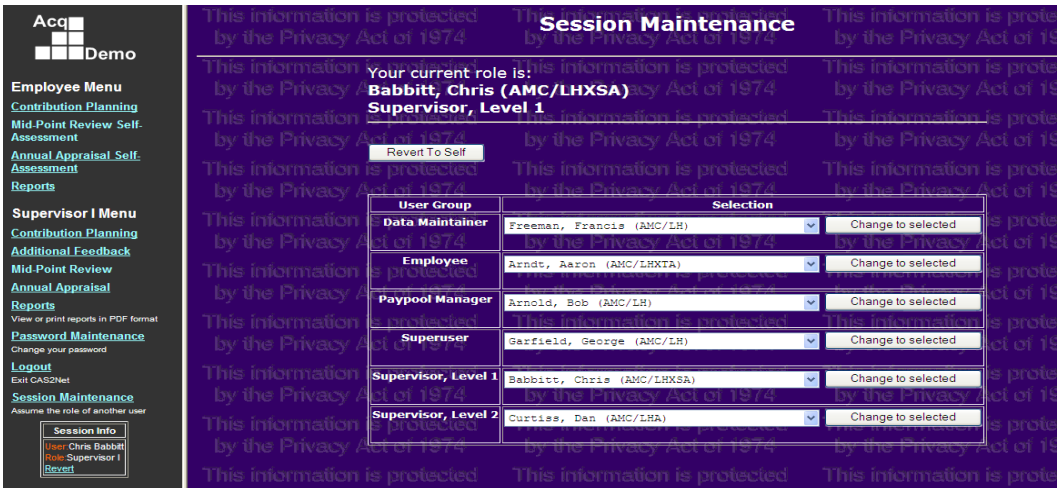


Figure 9-3: Session Maintenance – "Current Role Is…" Screen

6. To resume work as the logged in supervisor, click the "Revert To Self" button.
7. CAS2Net goes back to the logged on Superuser or Full Access User's Session Maintenance screen.

10. CAS2NET REPORTS

The CAS2NET Reports functionality allows supervisors to generate reports that list employees, appraisal status, supervisor assignments, etc. **Note:** CAS2NET-RPT-04, CAS2NET-RPT-05, CAS2NET-RPT-06 were terminated and do not exist.

The CAS2NET Reports functionality allows supervisors to generate reports that list employees, appraisal status, supervisor assignments, etc. **Note:** CAS2NET-RPT-04, CAS2NET-RPT-05, CAS2NET-RPT-06 were terminated and do not exist.

10.1 Employee Reports

- Clicking **Reports** in the Employee menu of the left side navigation bar brings up a list of reports that are available to the employee.
- CAS2Net displays CAS2Net report menu

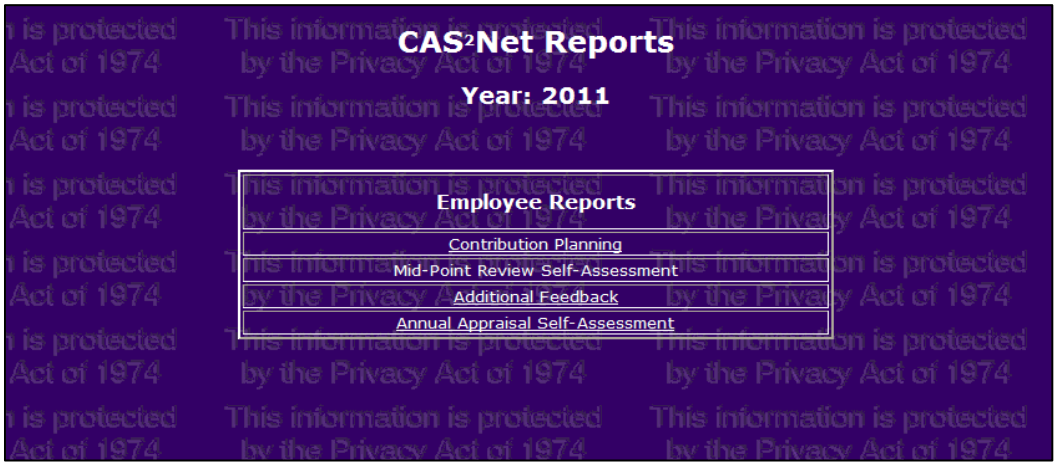
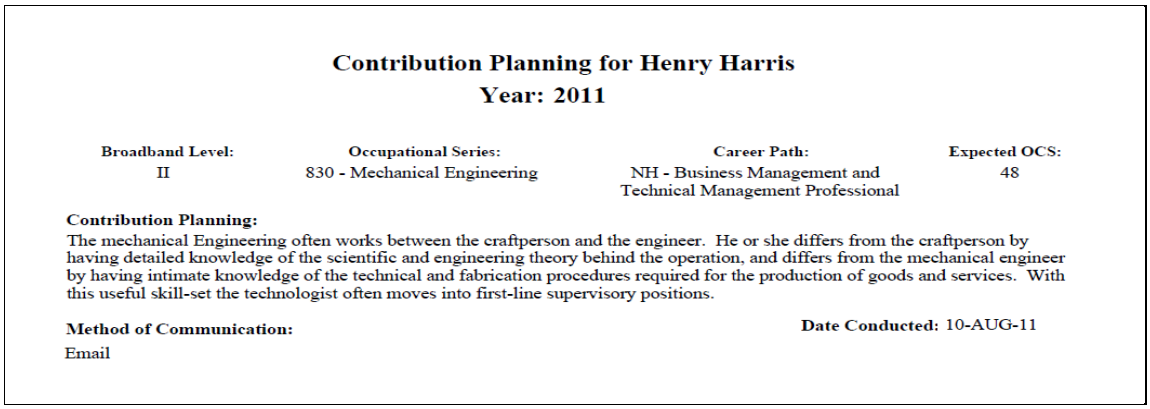


Figure 10-1 : Employee Reports Menu

10.1.1 Contribution Planning

- From the CAS2Net employee report menu, select Contribution Planning (only when provided).
- CAS2Net displays Contribution Planning reports (see figure: Sample Employee Contribution Planning Report).



Contribution Planning for Henry Harris
Year: 2011

Broadband Level:	Occupational Series:	Career Path:	Expected OCS:
II	830 - Mechanical Engineering	NH - Business Management and Technical Management Professional	48

Contribution Planning:
The mechanical Engineering often works between the craftperson and the engineer. He or she differs from the craftperson by having detailed knowledge of the scientific and engineering theory behind the operation, and differs from the mechanical engineer by having intimate knowledge of the technical and fabrication procedures required for the production of goods and services. With this useful skill-set the technologist often moves into first-line supervisory positions.

Method of Communication: Email

Date Conducted: 10-AUG-11

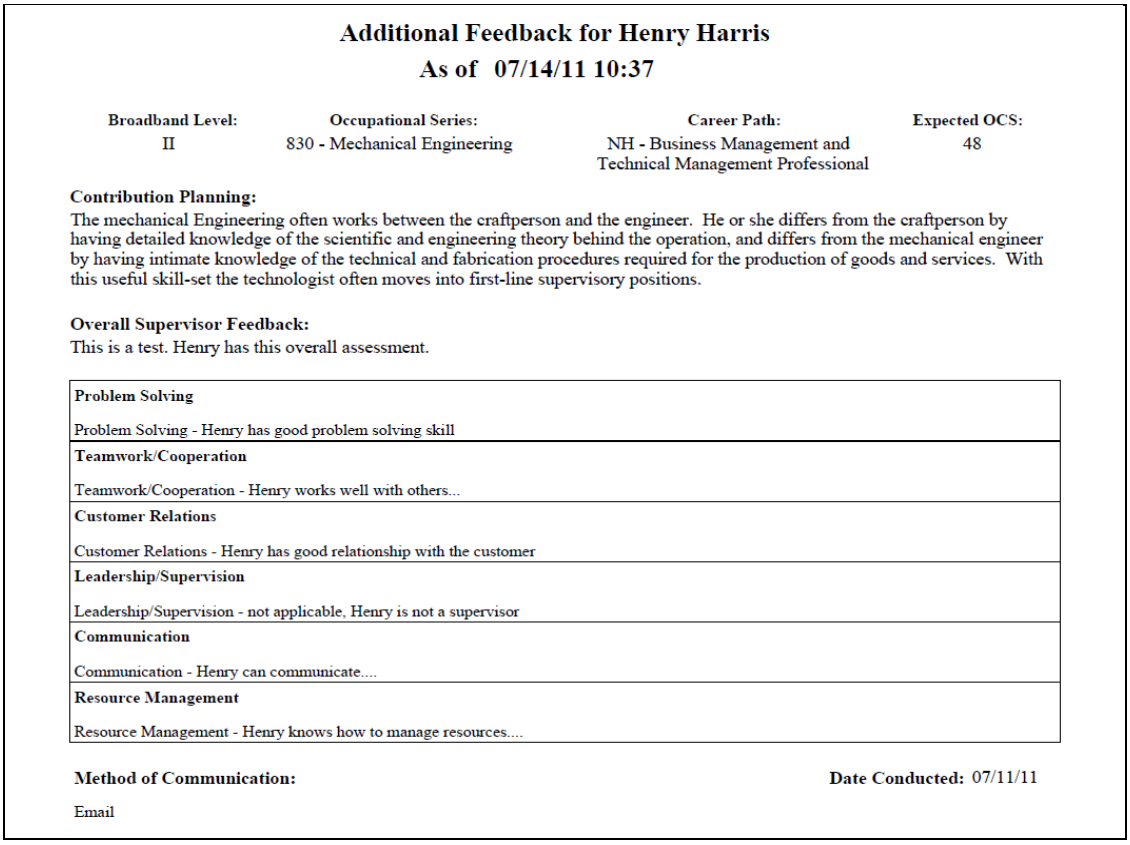
Figure 10-2 : Employee Contribution Planning Report

10.1.2 Mid-Point Review Self-Assessment

Deployment pending**.**

10.1.3 Additional Feedback

- From the CAS2Net employee report menu, select Additional Feedback (only when provided).
- CAS2Net displays Additional Feedback report (see figure: Sample Additional Feedback Report).



Additional Feedback for Henry Harris
As of 07/14/11 10:37

Broadband Level:	Occupational Series:	Career Path:	Expected OCS:
II	830 - Mechanical Engineering	NH - Business Management and Technical Management Professional	48

Contribution Planning:
The mechanical Engineering often works between the craftperson and the engineer. He or she differs from the craftperson by having detailed knowledge of the scientific and engineering theory behind the operation, and differs from the mechanical engineer by having intimate knowledge of the technical and fabrication procedures required for the production of goods and services. With this useful skill-set the technologist often moves into first-line supervisory positions.

Overall Supervisor Feedback:
This is a test. Henry has this overall assessment.

Problem Solving Problem Solving - Henry has good problem solving skill
Teamwork/Cooperation Teamwork/Cooperation - Henry works well with others...
Customer Relations Customer Relations - Henry has good relationship with the customer
Leadership/Supervision Leadership/Supervision - not applicable, Henry is not a supervisor
Communication Communication - Henry can communicate....
Resource Management Resource Management - Henry knows how to manage resources....

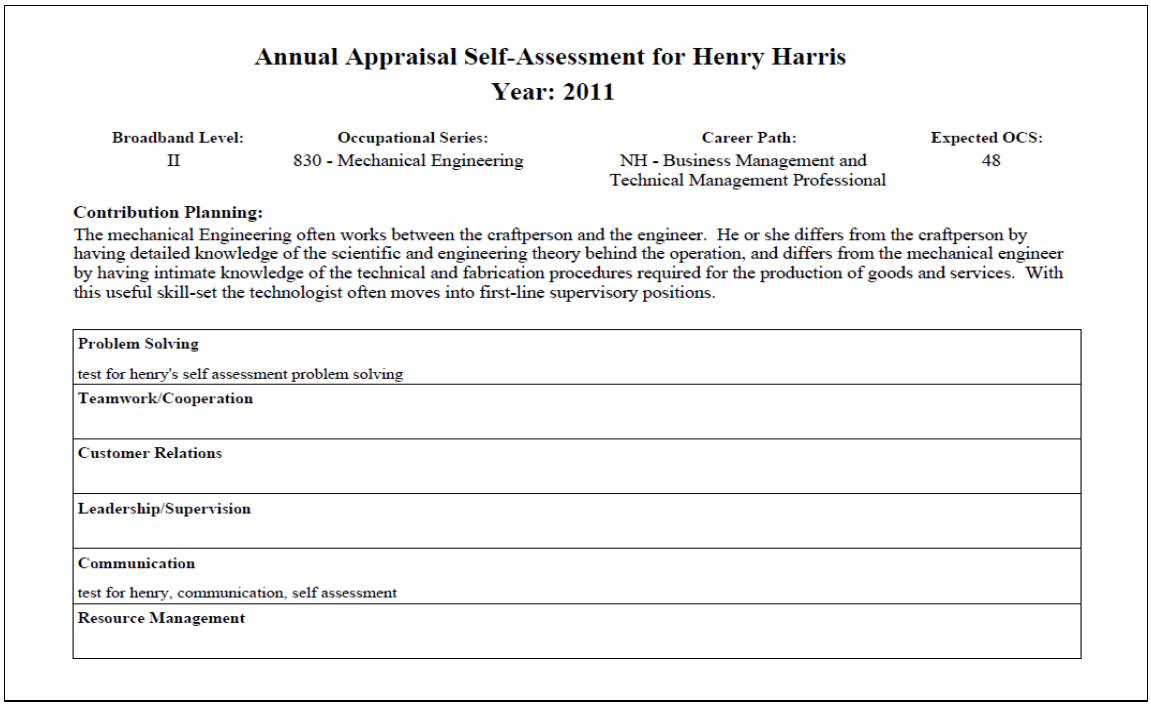
Method of Communication: Email

Date Conducted: 07/11/11

Figure 10-3: Employee Additional Feedback Report

10.1.4 Annual Appraisal Self-Assessment

- From the CAS2Net employee reports menu, select Annual Appraisal Self-Assessment (only when provided).
- CAS2Net displays Annual Appraisal Self-Assessment report (see figure: Sample Annual Appraisal Self-Assessment Report).



Annual Appraisal Self-Assessment for Henry Harris
Year: 2011

Broadband Level:	Occupational Series:	Career Path:	Expected OCS:
II	830 - Mechanical Engineering	NH - Business Management and Technical Management Professional	48

Contribution Planning:
The mechanical Engineering often works between the craftperson and the engineer. He or she differs from the craftperson by having detailed knowledge of the scientific and engineering theory behind the operation, and differs from the mechanical engineer by having intimate knowledge of the technical and fabrication procedures required for the production of goods and services. With this useful skill-set the technologist often moves into first-line supervisory positions.

Problem Solving test for henry's self assessment problem solving
Teamwork/Cooperation
Customer Relations
Leadership/Supervision
Communication test for henry, communication, self assessment
Resource Management

Figure 10-4: Annual Appraisal Self-Assessment Report

10.2 Supervisor Reports

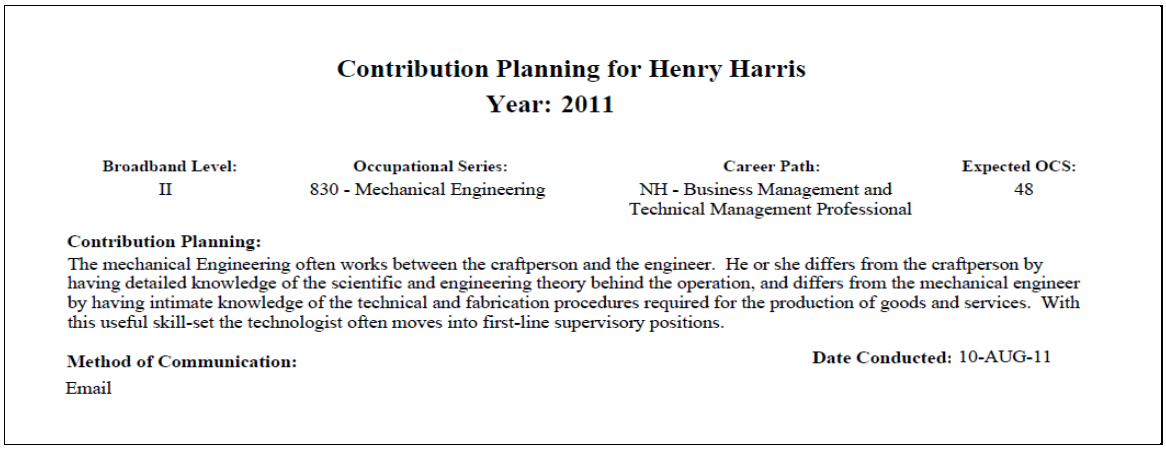
Clicking **Reports** in the supervisor menu of the left side navigation bar brings up a list of reports that are available to the supervisor role.

Figure 10-5: Supervisor Reports Menu

10.2.1 Contribution Planning – Single Employee

- From the Supervisor Reports menu, select Contribution Planning – Single Employee.
- CAS2Net displays Contribution Plan – Employee screen (see figure: Sample Contribution Planning Report – Single Employee selection).
- Select employee from the Employee Selection dropdown list.
- CAS2Net displays Contribution Planning report with the selected employee name print on the title (see figure: Sample Contribution Planning Report – Single Employee)

Figure 10-6: Contribution Planning Report – Single Employee Selection



Contribution Planning for Henry Harris
Year: 2011

Broadband Level:	Occupational Series:	Career Path:	Expected OCS:
II	830 - Mechanical Engineering	NH - Business Management and Technical Management Professional	48

Contribution Planning:
The mechanical Engineering often works between the craftperson and the engineer. He or she differs from the craftperson by having detailed knowledge of the scientific and engineering theory behind the operation, and differs from the mechanical engineer by having intimate knowledge of the technical and fabrication procedures required for the production of goods and services. With this useful skill-set the technologist often moves into first-line supervisory positions.

Method of Communication:
Email

Date Conducted: 10-AUG-11

Figure 10-7: Contribution Planning Report – Single Employee

10.2.2 Contribution Planning – All Employees

- From the Supervisor Reports menu, select Contribution Planning – All Employees.
- CAS2Net displays Contribution Plan screen.
- Select supervisor name from the Supervisor Selection dropdown list (if Supervisor I runs the reports, his/her name is defaulted and no other names show in the dropdown list).
- CAS2Net displays Contribution Planning reports of all employees, with each employee name print on the title of each employee Contribution Planning report (Note: All Employees report format is the same as Single Employee format, see figure: Sample Contribution Planning Report – Single Employee for example).

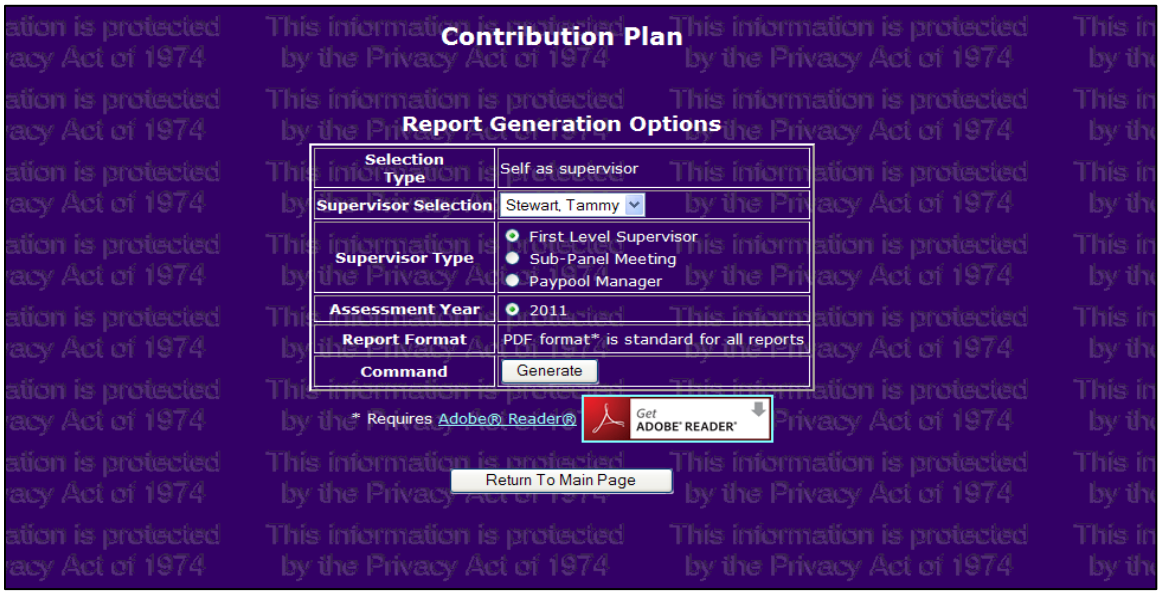
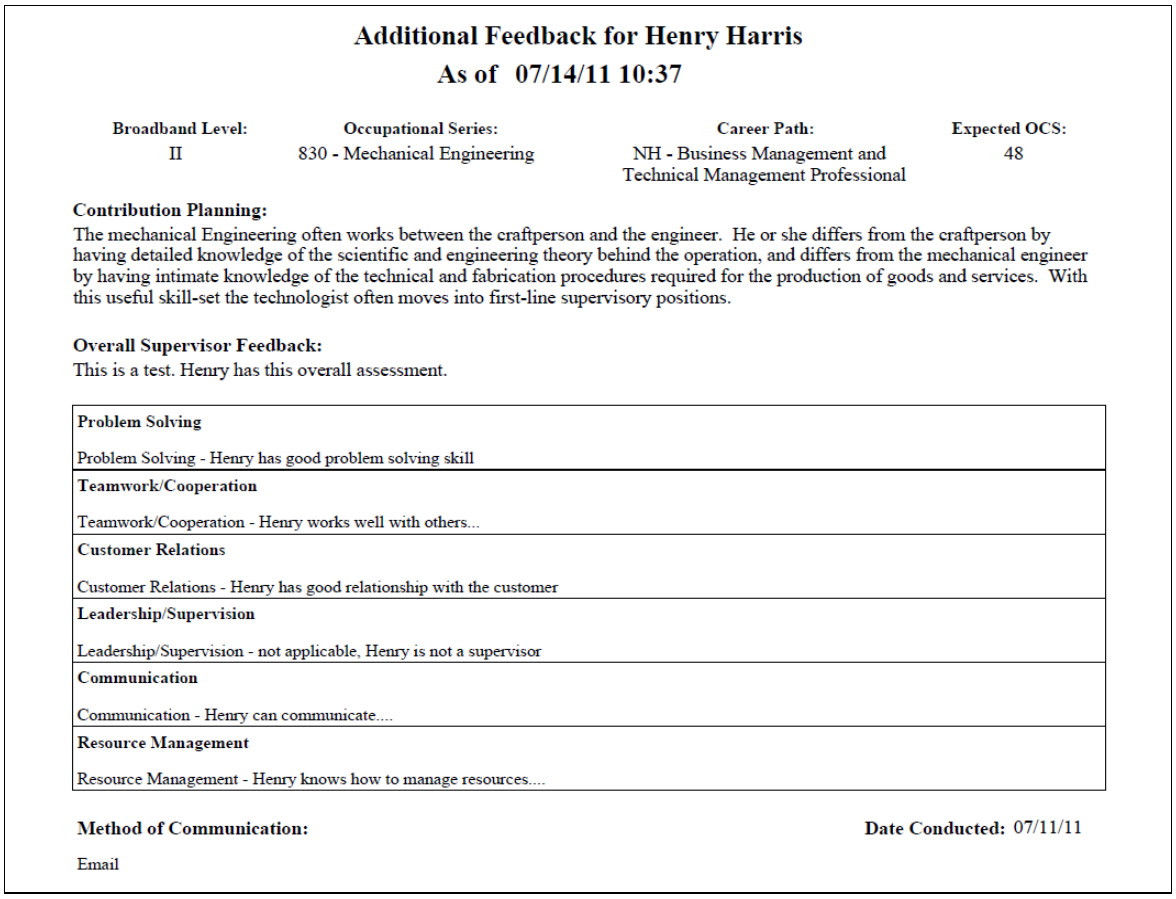


Figure 10-8: Contribution Planning Report – All Employees Selection

10.2.3 Additional Feedback – Single Employee

- From the Supervisor Reports menu, select Additional Feedback – Single Employee.
- CAS2Net displays Additional Feedback – Employee screen (see figure: Sample Additional Feedback Report – Single Employee selection).
- Select employee from the Employee Selection dropdown list.
- CAS2Net displays Additional Feedback report with the selected employee name print on the title (see figure: Sample Additional Feedback Report – Single Employee).

Figure 10-9: Additional Feedback Report – Single Employee Selection



Additional Feedback for Henry Harris
As of 07/14/11 10:37

Broadband Level:	Occupational Series:	Career Path:	Expected OCS:
II	830 - Mechanical Engineering	NH - Business Management and Technical Management Professional	48

Contribution Planning:
The mechanical Engineering often works between the craftperson and the engineer. He or she differs from the craftperson by having detailed knowledge of the scientific and engineering theory behind the operation, and differs from the mechanical engineer by having intimate knowledge of the technical and fabrication procedures required for the production of goods and services. With this useful skill-set the technologist often moves into first-line supervisory positions.

Overall Supervisor Feedback:
This is a test. Henry has this overall assessment.

Problem Solving Problem Solving - Henry has good problem solving skill
Teamwork/Cooperation Teamwork/Cooperation - Henry works well with others...
Customer Relations Customer Relations - Henry has good relationship with the customer
Leadership/Supervision Leadership/Supervision - not applicable, Henry is not a supervisor
Communication Communication - Henry can communicate....
Resource Management Resource Management - Henry knows how to manage resources....

Method of Communication: **Date Conducted:** 07/11/11

Email

Figure 10-10: Additional Feedback Report – Single Employee

10.2.4 Additional Feedback – All Employees

- From the Supervisor Reports menu, select Additional Feedback – All Employees.
- CAS2Net displays Additional Feedback screen (see figure: Sample Additional Feedback Report - All Employees selection).
- Select supervisor name from the Supervisor Selection dropdown list (if Supervisor I runs the reports, his/her name is defaulted and no other names show in the dropdown list).
- CAS2Net displays Additional Feedback reports of all employees, with each employee name print on the title of each employee Additional Feedback report.

  (Note: All Employees report format is the same as Single Employee format, see figure: Sample Additional Feedback Report – Single Employee for example).

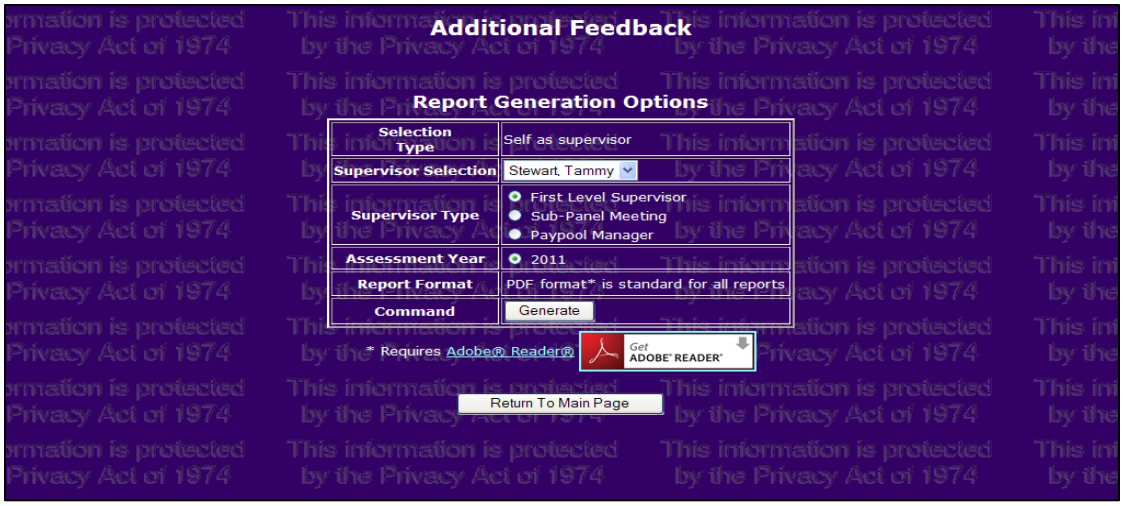


Figure 10-11: Additional Feedback Report - All Employees Selection

10.2.5 Mid-Point Review

(Deployment Pending)

10.2.6 Appraisal Form Parts II and III – Single Employee

- From the Supervisor Reports menu, select Appraisal Form Parts II and III – Single Employee.
- CAS2Net displays Appraisal Form Parts II and III screen (see figure: Sample Appraisal Form Parts II and III – Single Employee selection).
- Select employee from the Employee Selection dropdown list.
- CAS2Net displays CCAS Salary Appraisal Document report in two parts: Part II – Supervisor Assessment and Part III – Employee Self-Assessment (see figure: Sample Appraisal Form Parts II and III – Single Employee, Part II and figure: Sample Appraisal Form Parts II and III – Single Employee, Part III).

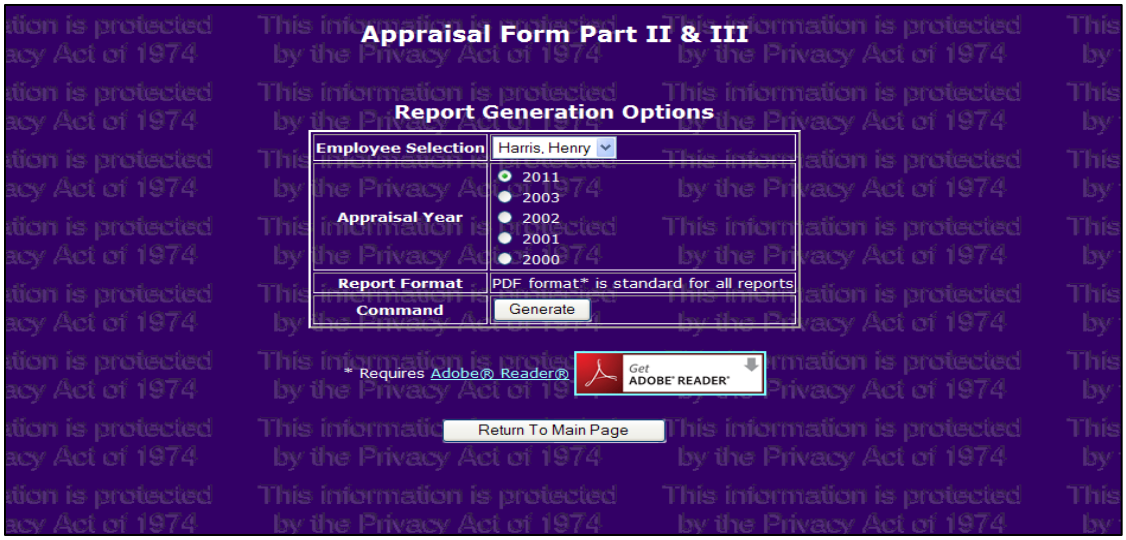


Figure 10-12: Appraisal Form Parts II and III – Single Employee Selection

CCAS SALARY APPRAISAL DOCUMENT

NAME: Henry Harris **RATER:** Tammy Stewart **ORG:** AMC/LH

Broadband Level:	Occupational Series:	Career Path:	OCS:
II	830 - Mechanical Engineering	NH - Business Management and Technical Management Professional	75

Contribution Planning:

The mechanical Engineering often works between the craftperson and the engineer. He or she differs from the craftperson by having detailed knowledge of the scientific and engineering theory behind the operation, and differs from the mechanical engineer by having intimate knowledge of the technical and fabrication procedures required for the production of goods and services. With this useful skill-set the technologist often moves into first-line supervisory positions.

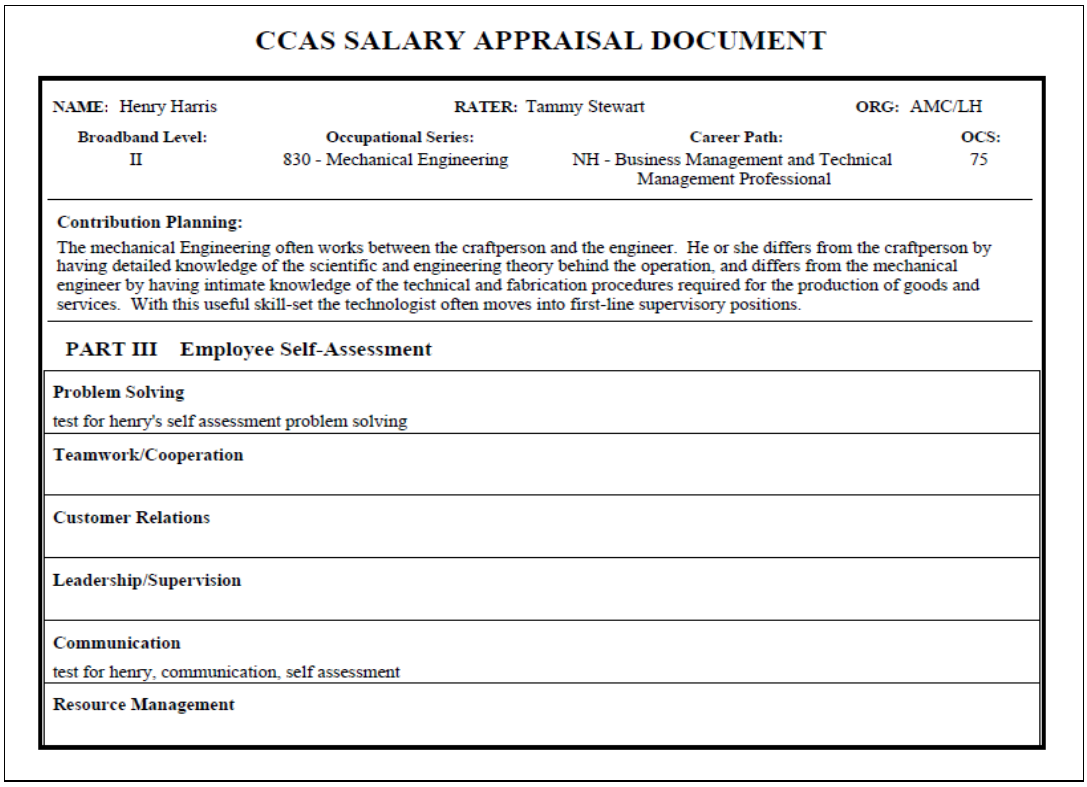
PART II Supervisor Assessment

DRAFT Assessment - not complete until finalized by Pay Pool Panel

Instruction: Provide comments regarding employee's contribution against each factor during the current year and a score of each factor.	Categorical Score:	Numeric Score:
Problem Solving None	3M	71
Teamwork/Cooperation None	3L	66
Customer Relations None	3H	82
Leadership/Supervision None	3L	65
Communication None	3H	83
Resource Management None	4L	83

Signature Date

Figure 10-13: Appraisal Form Parts II and III – Single Employee, Part II



CCAS SALARY APPRAISAL DOCUMENT

NAME: Henry Harris **RATER:** Tammy Stewart **ORG:** AMC/LH

Broadband Level:	Occupational Series:	Career Path:	OCS:
II	830 - Mechanical Engineering	NH - Business Management and Technical Management Professional	75

Contribution Planning:

The mechanical Engineering often works between the craftperson and the engineer. He or she differs from the craftperson by having detailed knowledge of the scientific and engineering theory behind the operation, and differs from the mechanical engineer by having intimate knowledge of the technical and fabrication procedures required for the production of goods and services. With this useful skill-set the technologist often moves into first-line supervisory positions.

PART III Employee Self-Assessment

Problem Solving test for henry's self assessment problem solving
Teamwork/Cooperation
Customer Relations
Leadership/Supervision
Communication test for henry, communication, self assessment
Resource Management

Figure 10-14: Appraisal Form Parts II and III – Single Employee, Part III

10.2.7 Appraisal Form Parts II and III – All Employees

- From the Supervisor Reports menu, select Appraisal Form Parts II and III – All Employees.
- CAS2Net displays Appraisal Form Parts II and III screen (see figure: Sample Appraisal Form Parts II and III - All Employees selection).
- Select supervisor name from the Supervisor Selection dropdown list (if Supervisor I runs the reports, his/her name is defaulted and no other names show in the dropdown list).
- CAS2Net displays all employees' CCAS Salary Appraisal Document reports:
    - CCAS Salary Appraisal Document cover page: supervisor name, supervisor role, year of performance (see figure: Sample Annual Appraisal Report Parts II and III – All Employees, cover page).
    - CCAS Salary Appraisal Document reports of all employees, each employee's report contains two parts: Part II – Supervisor Assessment and Part III – Employee Self-Assessment.

      (Note: All Employees report format is the same as Single Employee format, see figure: Sample Appraisal Form Parts II and III – Single Employee, Part II and figure: Sample Appraisal Form Parts II and III – Single Employee, Part III for example).

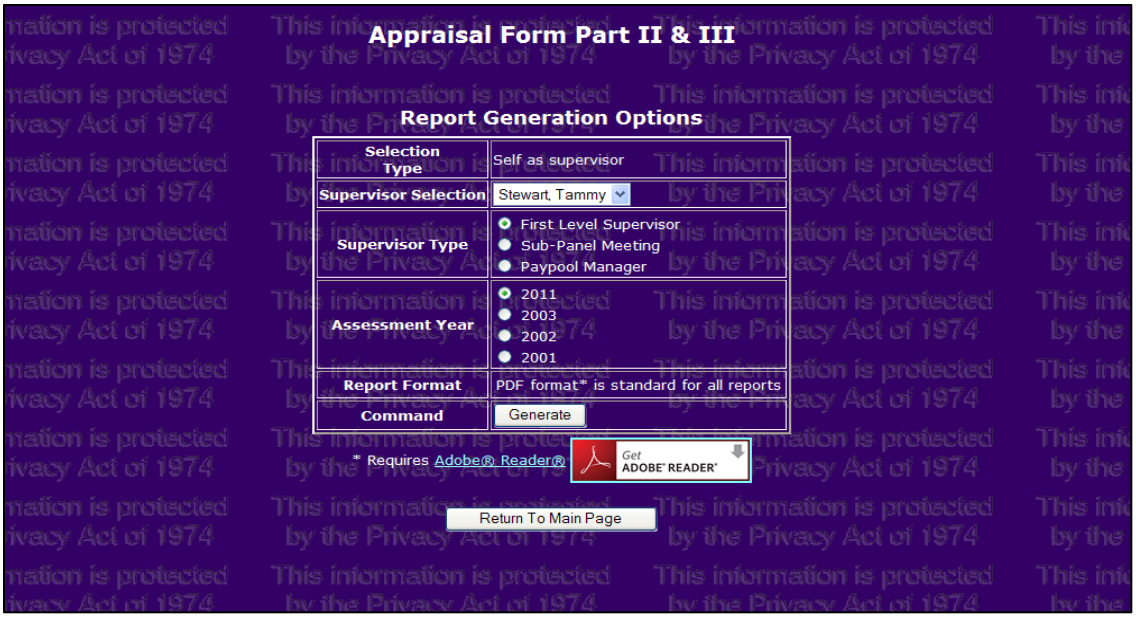


Figure 10-15: Appraisal Form Parts II and III – All Employees Selection

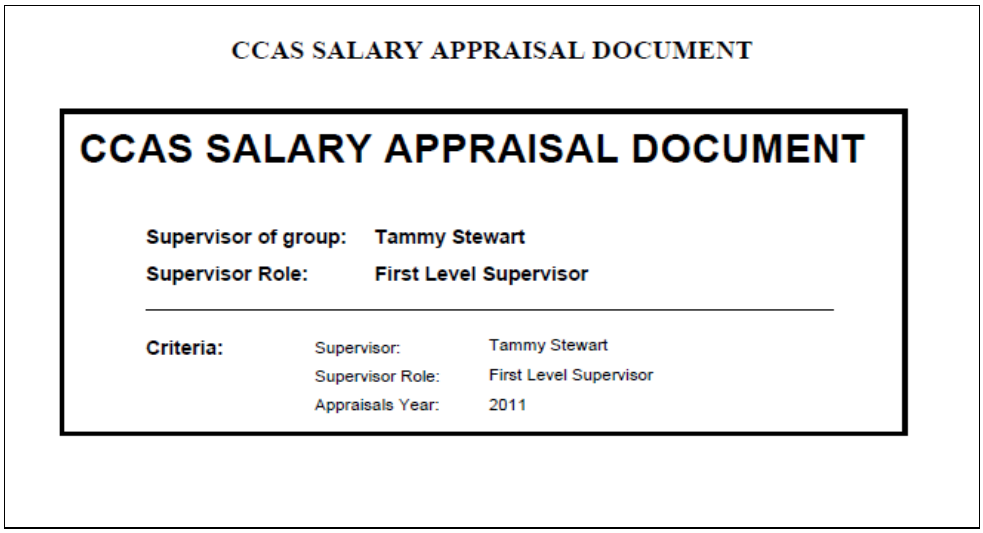


Figure 10-16: Annual Appraisal Report Parts II and III – All Employees, Cover Page

10.2.8 Appraisal Form Part II by Employee

Generates a report, presenting an employee's appraisal form which details their categorical and numerical score per factor including comments.

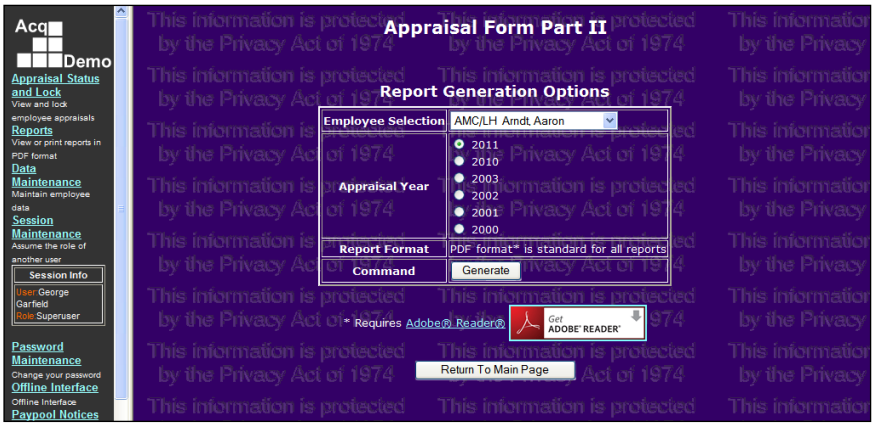
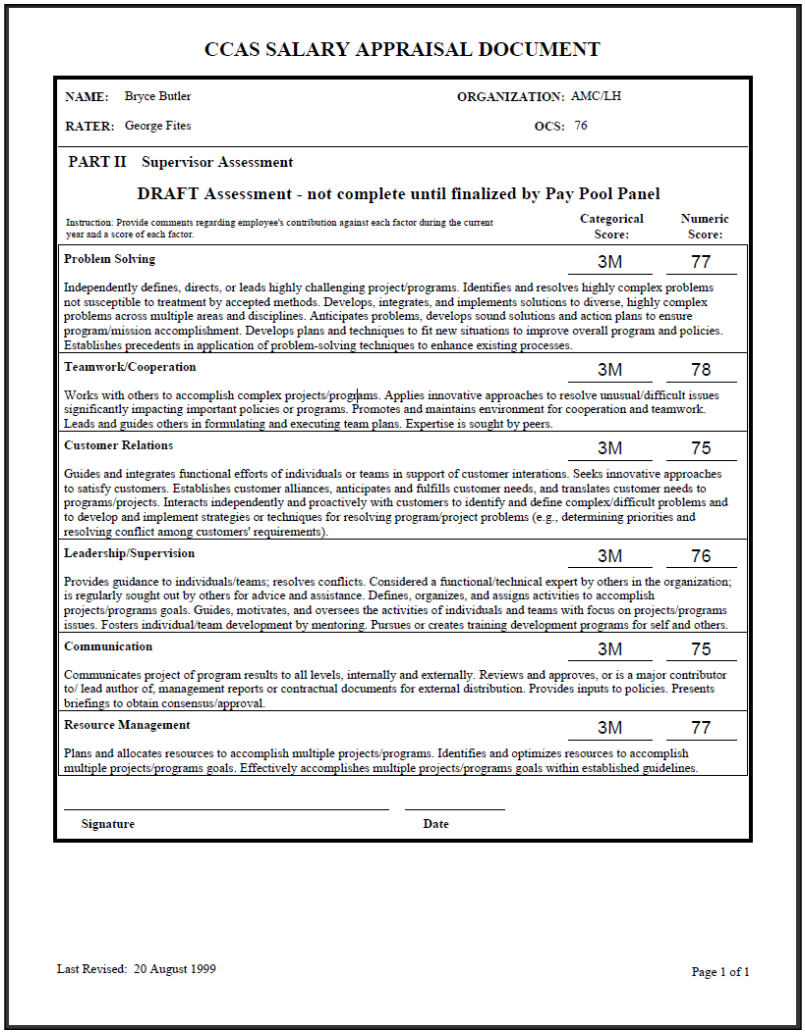


Figure 10-17: Appraisal Form Part II by Employee Report Selection



CCAS SALARY APPRAISAL DOCUMENT

NAME: Bryce Butler **ORGANIZATION:** AMC/LH

RATER: George Fites **OCS:** 76

PART II Supervisor Assessment

DRAFT Assessment - not complete until finalized by Pay Pool Panel

Instruction: Provide comments regarding employee's contribution against each factor during the current year and a score of each factor.	Categorical Score:	Numeric Score:
Problem Solving	3M	77
Independently defines, directs, or leads highly challenging project/programs. Identifies and resolves highly complex problems not susceptible to treatment by accepted methods. Develops, integrates, and implements solutions to diverse, highly complex problems across multiple areas and disciplines. Anticipates problems, develops sound solutions and action plans to ensure program/mission accomplishment. Develops plans and techniques to fit new situations to improve overall program and policies. Establishes precedents in application of problem-solving techniques to enhance existing processes.		
Teamwork/Cooperation	3M	78
Works with others to accomplish complex projects/programs. Applies innovative approaches to resolve unusual/difficult issues significantly impacting important policies or programs. Promotes and maintains environment for cooperation and teamwork. Leads and guides others in formulating and executing team plans. Expertise is sought by peers.		
Customer Relations	3M	75
Guides and integrates functional efforts of individuals or teams in support of customer interations. Seeks innovative approaches to satisfy customers. Establishes customer alliances, anticipates and fulfills customer needs, and translates customer needs to programs/projects. Interacts independently and proactively with customers to identify and define complex/difficult problems and to develop and implement strategies or techniques for resolving program/project problems (e.g., determining priorities and resolving conflict among customers' requirements).		
Leadership/Supervision	3M	76
Provides guidance to individuals/teams; resolves conflicts. Considered a functional/technical expert by others in the organization; is regularly sought out by others for advice and assistance. Defines, organizes, and assigns activities to accomplish projects/programs goals. Guides, motivates, and oversees the activities of individuals and teams with focus on projects/programs issues. Fosters individual/team development by mentoring. Pursues or creates training development programs for self and others.		
Communication	3M	75
Communicates project of program results to all levels, internally and externally. Reviews and approves, or is a major contributor to/ lead author of, management reports or contractual documents for external distribution. Provides inputs to policies. Presents briefings to obtain consensus/approval.		
Resource Management	3M	77
Plans and allocates resources to accomplish multiple projects/programs. Identifies and optimizes resources to accomplish multiple projects/programs goals. Effectively accomplishes multiple projects/programs goals within established guidelines.		

Signature **Date**

Last Revised: 20 August 1999

Page 1 of 1

Figure 10-18: Appraisal Form Part II by Employee Report

10.2.9 Appraisal Form Part II by Supervisor

Presents a list of employee appraisal forms by supervisor, which details their categorical and numerical score per factor including comments.

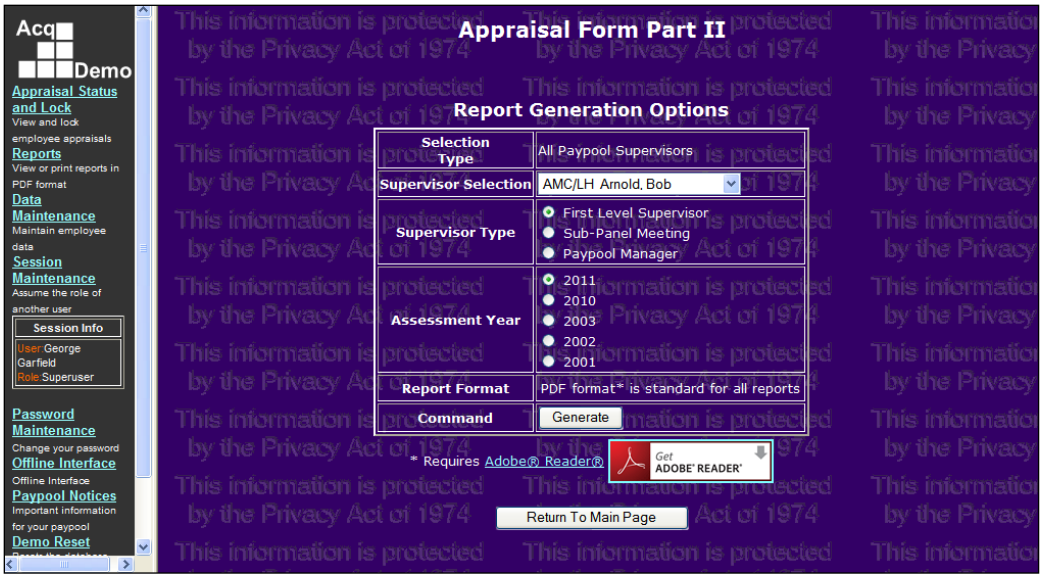


Figure 10-19: Apraisal Form Part II Selection

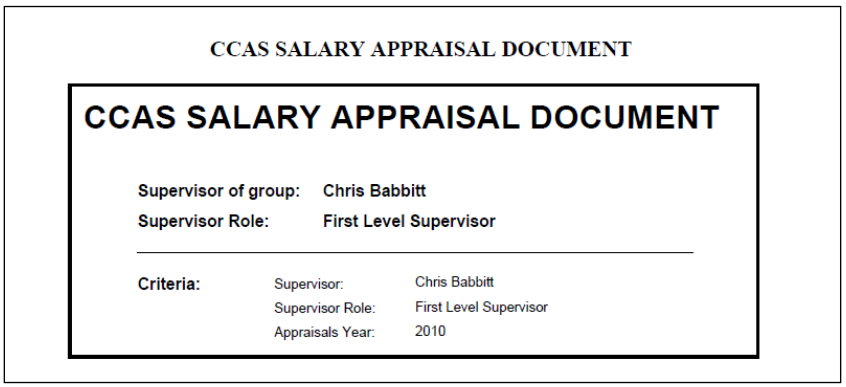
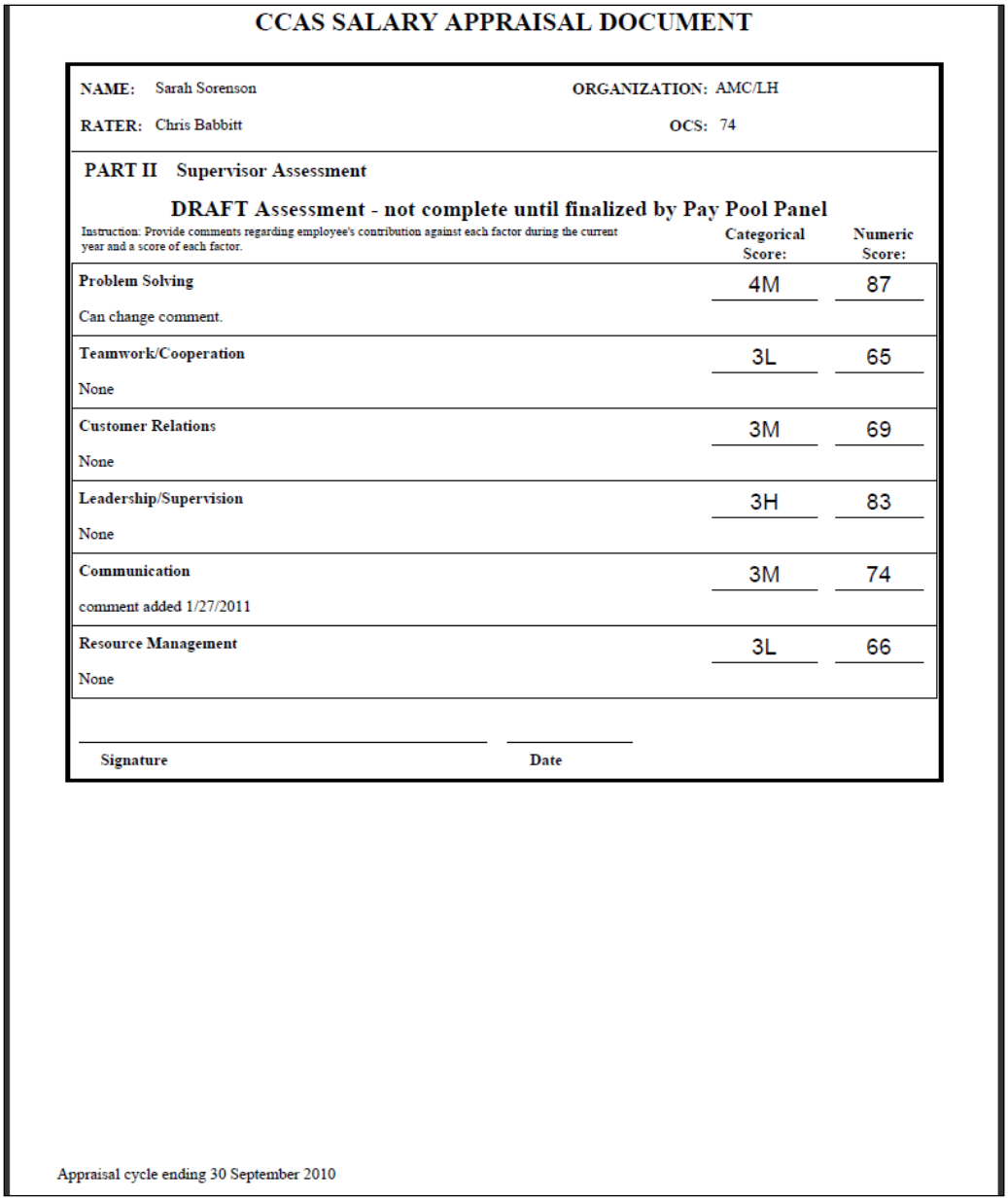


Figure 10-20: Appraisal Form Part II by Supervisor (PAGE 1)



CCAS SALARY APPRAISAL DOCUMENT

NAME: Sarah Sorenson **ORGANIZATION:** AMC/LH

RATER: Chris Babbitt **OCS:** 74

PART II Supervisor Assessment

DRAFT Assessment - not complete until finalized by Pay Pool Panel

Instruction: Provide comments regarding employee's contribution against each factor during the current year and a score of each factor.	Categorical Score:	Numeric Score:
Problem Solving Can change comment.	4M	87
Teamwork/Cooperation None	3L	65
Customer Relations None	3M	69
Leadership/Supervision None	3H	83
Communication comment added 1/27/2011	3M	74
Resource Management None	3L	66

Signature **Date**

Appraisal cycle ending 30 September 2010

Figure 10-21: Appraisal Form Part II by Supervisor (PAGE 2)

10.2.10 Appraisal Status Report

Presents the status of appraisals within a paypool.

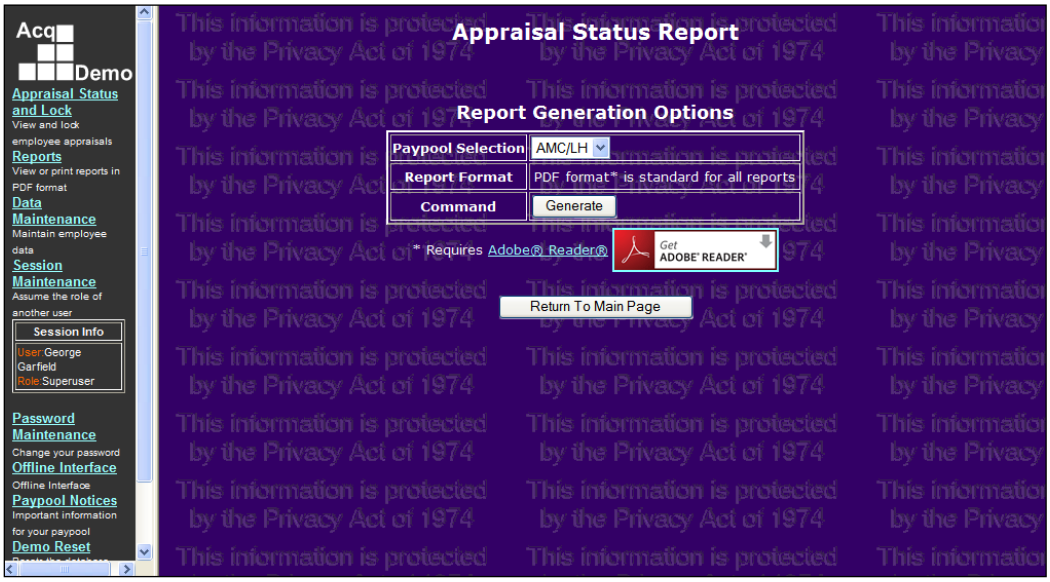
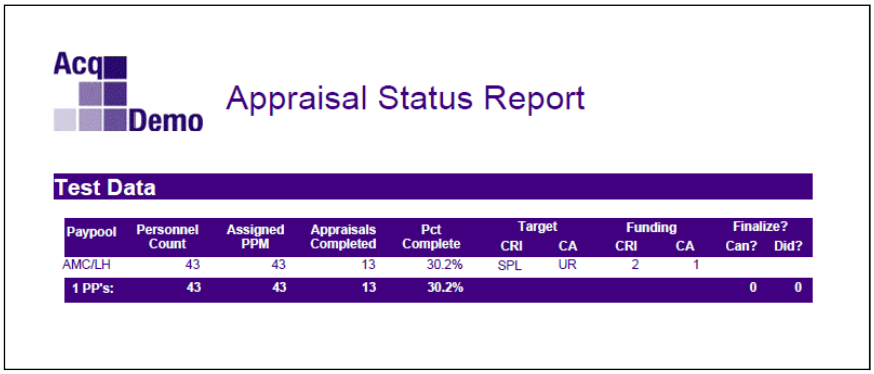


Figure 10-22: Appraisal Status Report Selection

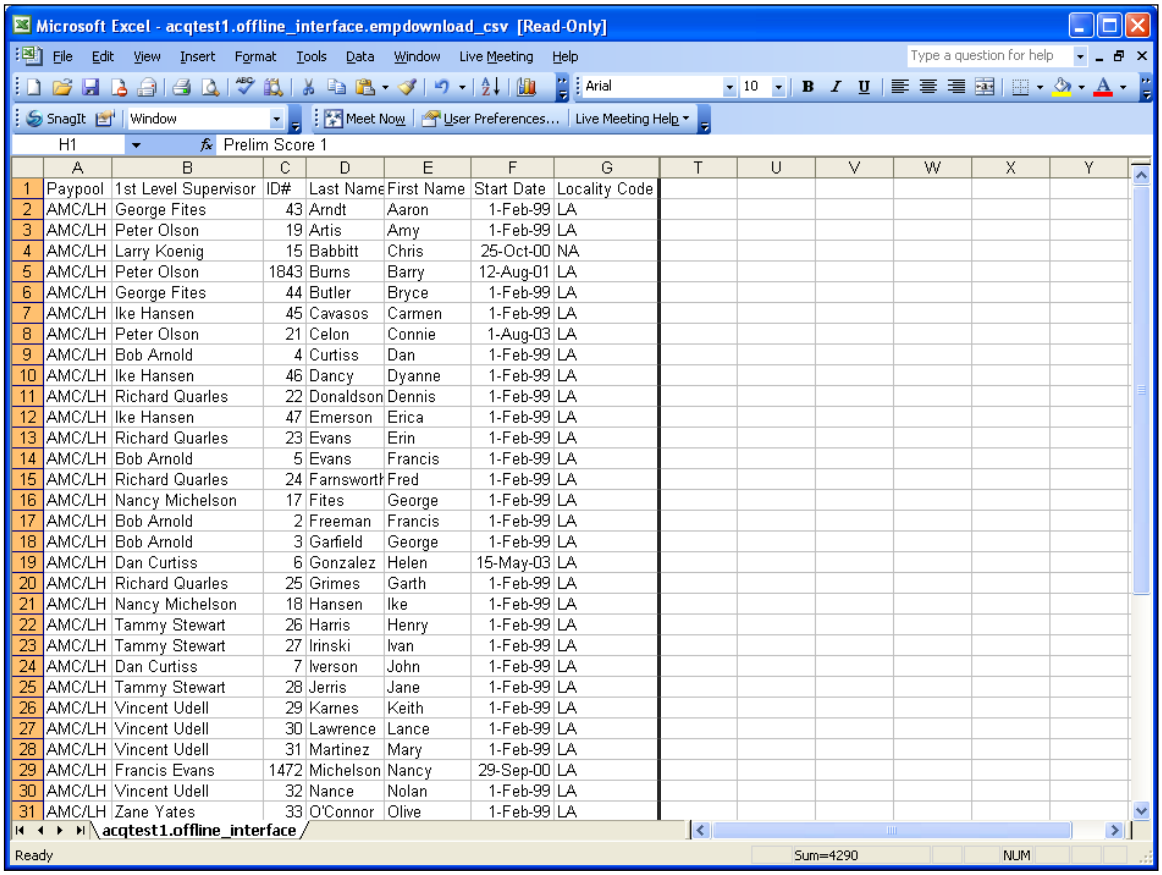


Paypool	Personnel Count	Assigned PPM	Appraisals Completed	Pct Complete	Target CRI	Target CA	Funding CRI	Funding CA	Finalize? Can?	Finalize? Did?
AMC/LH	43	43	13	30.2%	SPL	UR	2	1		
1 PP's:	**43**	**43**	**13**	**30.2%**					**0**	**0**

Figure 10-23: Appraisal Status Report

10.2.11 Download Employee Data

Presents employees within a paypool's information based on selected data fields.



	A	B	C	D	E	F	G	T	U	V	W	X	Y
1	Paypool	1st Level Supervisor	ID#	Last Name	First Name	Start Date	Locality Code						
2	AMC/LH	George Fites	43	Arndt	Aaron	1-Feb-99	LA						
3	AMC/LH	Peter Olson	19	Artis	Amy	1-Feb-99	LA						
4	AMC/LH	Larry Koenig	15	Babbitt	Chris	25-Oct-00	NA						
5	AMC/LH	Peter Olson	1843	Burns	Barry	12-Aug-01	LA						
6	AMC/LH	George Fites	44	Butler	Bryce	1-Feb-99	LA						
7	AMC/LH	Ike Hansen	45	Cavasos	Carmen	1-Feb-99	LA						
8	AMC/LH	Peter Olson	21	Celon	Connie	1-Aug-03	LA						
9	AMC/LH	Bob Arnold	4	Curtiss	Dan	1-Feb-99	LA						
10	AMC/LH	Ike Hansen	46	Dancy	Dyanne	1-Feb-99	LA						
11	AMC/LH	Richard Quarles	22	Donaldson	Dennis	1-Feb-99	LA						
12	AMC/LH	Ike Hansen	47	Emerson	Erica	1-Feb-99	LA						
13	AMC/LH	Richard Quarles	23	Evans	Erin	1-Feb-99	LA						
14	AMC/LH	Bob Arnold	5	Evans	Francis	1-Feb-99	LA						
15	AMC/LH	Richard Quarles	24	Farnsworth	Fred	1-Feb-99	LA						
16	AMC/LH	Nancy Michelson	17	Fites	George	1-Feb-99	LA						
17	AMC/LH	Bob Arnold	2	Freeman	Francis	1-Feb-99	LA						
18	AMC/LH	Bob Arnold	3	Garfield	George	1-Feb-99	LA						
19	AMC/LH	Dan Curtiss	6	Gonzalez	Helen	15-May-03	LA						
20	AMC/LH	Richard Quarles	25	Grimes	Garth	1-Feb-99	LA						
21	AMC/LH	Nancy Michelson	18	Hansen	Ike	1-Feb-99	LA						
22	AMC/LH	Tammy Stewart	26	Harris	Henry	1-Feb-99	LA						
23	AMC/LH	Tammy Stewart	27	Irinski	Ivan	1-Feb-99	LA						
24	AMC/LH	Dan Curtiss	7	Iverson	John	1-Feb-99	LA						
25	AMC/LH	Tammy Stewart	28	Jerris	Jane	1-Feb-99	LA						
26	AMC/LH	Vincent Udell	29	Karnes	Keith	1-Feb-99	LA						
27	AMC/LH	Vincent Udell	30	Lawrence	Lance	1-Feb-99	LA						
28	AMC/LH	Vincent Udell	31	Martinez	Mary	1-Feb-99	LA						
29	AMC/LH	Francis Evans	1472	Michelson	Nancy	29-Sep-00	LA						
30	AMC/LH	Vincent Udell	32	Nance	Nolan	1-Feb-99	LA						
31	AMC/LH	Zane Yates	33	O'Connor	Olive	1-Feb-99	LA						

Figure 10-24: Download Employee Data – Excel Worksheet

10.2.12 Employee Roster Report

Use the Employee Roster Report to print and review the list of employees assigned to your paypool. Check to see if any demo employees are missing from your paypool. If they are, they may be in "transfer paypool".

Click "Reports" from the navigation bar. CAS2Net refreshes the screen to display the list of reports.

Click the "Employee Roster" link from the reports list.

Figure 10-25: Employee Roster Report Selection

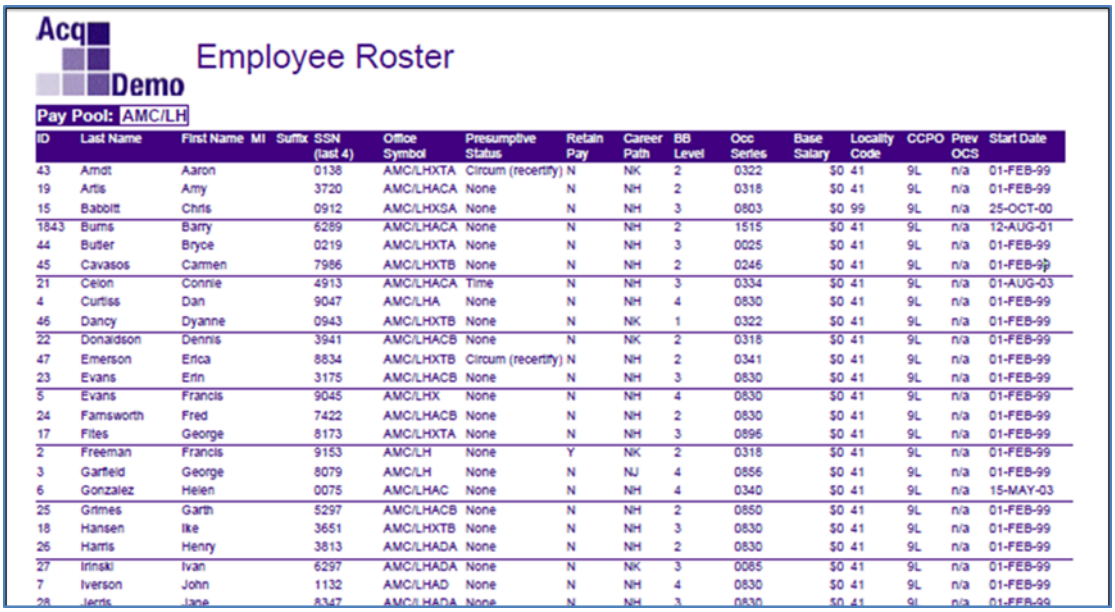
CAS2Net refreshes to display the "Employee Roster Report" screen.

Select your paypool from the Pay pool Selection dropdown (Only two choices for Data Maintainers).

Before the report is generated, you have the option to sort the data by Name, Office Symbol, or ID. Select the desired "sort by" radio button.

Click the "Generate" button.

CAS2Net opens a new window to display the generated Employee Roster Report.



Acq Demo

Employee Roster

Pay Pool: AMC/LH

ID	Last Name	First Name	MI	Suffix	SSN (last 4)	Office Symbol	Presumptive Status	Retain Pay	Career Path	BB Level	Occ Series	Base Salary	Locality Code	CCPO	Prev OCS	Start Date
43	Arndt	Aaron			0138	AMC/LHXTA	Circum (recertify)	N	NK	2	0322	$0	41	9L	n/a	01-FEB-99
19	Artis	Amy			3720	AMC/LHACA	None	N	NH	2	0318	$0	41	9L	n/a	01-FEB-99
15	Babbitt	Chris			0912	AMC/LHXSA	None	N	NH	3	0803	$0	99	9L	n/a	25-OCT-00
1843	Burns	Barry			6289	AMC/LHACA	None	N	NH	2	1515	$0	41	9L	n/a	12-AUG-01
44	Butler	Bryce			0219	AMC/LHXTA	None	N	NH	3	0025	$0	41	9L	n/a	01-FEB-99
45	Cavasos	Carmen			7956	AMC/LHXTB	None	N	NH	2	0246	$0	41	9L	n/a	01-FEB-99
21	Celon	Connie			4913	AMC/LHACA	Time	N	NH	3	0334	$0	41	9L	n/a	01-AUG-03
4	Curtiss	Dan			9047	AMC/LHA	None	N	NH	4	0830	$0	41	9L	n/a	01-FEB-99
46	Dancy	Dyanne			0943	AMC/LHXTB	None	N	NK	1	0322	$0	41	9L	n/a	01-FEB-99
22	Donaldson	Dennis			3941	AMC/LHACB	None	N	NK	2	0318	$0	41	9L	n/a	01-FEB-99
47	Emerson	Erica			8834	AMC/LHXTB	Circum (recertify)	N	NH	2	0341	$0	41	9L	n/a	01-FEB-99
23	Evans	Erin			3175	AMC/LHACB	None	N	NH	3	0830	$0	41	9L	n/a	01-FEB-99
5	Evans	Francis			9045	AMC/LHX	None	N	NH	4	0830	$0	41	9L	n/a	01-FEB-99
24	Farnsworth	Fred			7422	AMC/LHACB	None	N	NH	2	0830	$0	41	9L	n/a	01-FEB-99
17	Fites	George			8173	AMC/LHXTA	None	N	NH	3	0896	$0	41	9L	n/a	01-FEB-99
2	Freeman	Francis			9153	AMC/LH	None	Y	NK	2	0318	$0	41	9L	n/a	01-FEB-99
3	Garfield	George			8079	AMC/LH	None	N	NJ	4	0856	$0	41	9L	n/a	01-FEB-99
6	Gonzalez	Helen			0075	AMC/LHAC	None	N	NH	4	0340	$0	41	9L	n/a	15-MAY-03
25	Grimes	Garth			5297	AMC/LHACB	None	N	NH	2	0850	$0	41	9L	n/a	01-FEB-99
18	Hansen	Ike			3651	AMC/LHXTB	None	N	NH	3	0830	$0	41	9L	n/a	01-FEB-99
26	Harris	Henry			3813	AMC/LHADA	None	N	NH	2	0830	$0	41	9L	n/a	01-FEB-99
27	Irinski	Ivan			6297	AMC/LHADA	None	N	NK	3	0085	$0	41	9L	n/a	01-FEB-99
7	Iverson	John			1132	AMC/LHAD	None	N	NH	4	0830	$0	41	9L	n/a	01-FEB-99
28	Jerris	Jane			8347	AMC/LHADA	None	N	NH	3	0830	$0	41	9L	n/a	01-FEB-99

Figure 10-26: Employee Roster Report

10.2.13 Post Cycle Activity Report

Produces a list of employees based on leavers, joiners, temporary promotions, permanent promotions, and demotions.

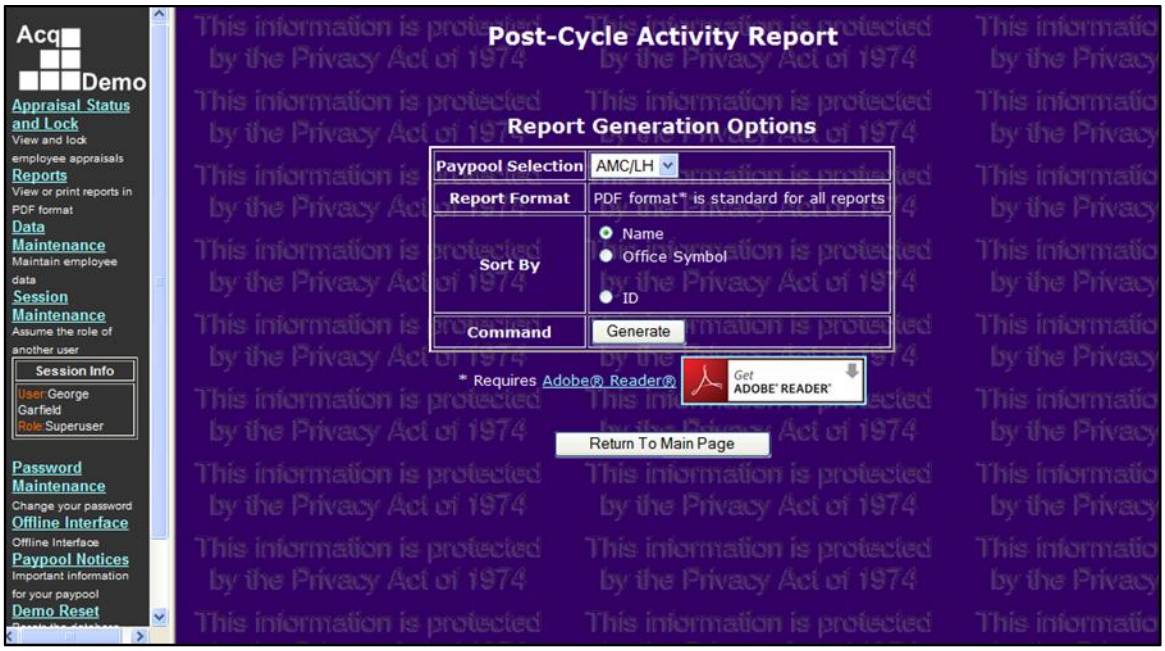


Figure 10-27: Post Cycle Activity Report Selection

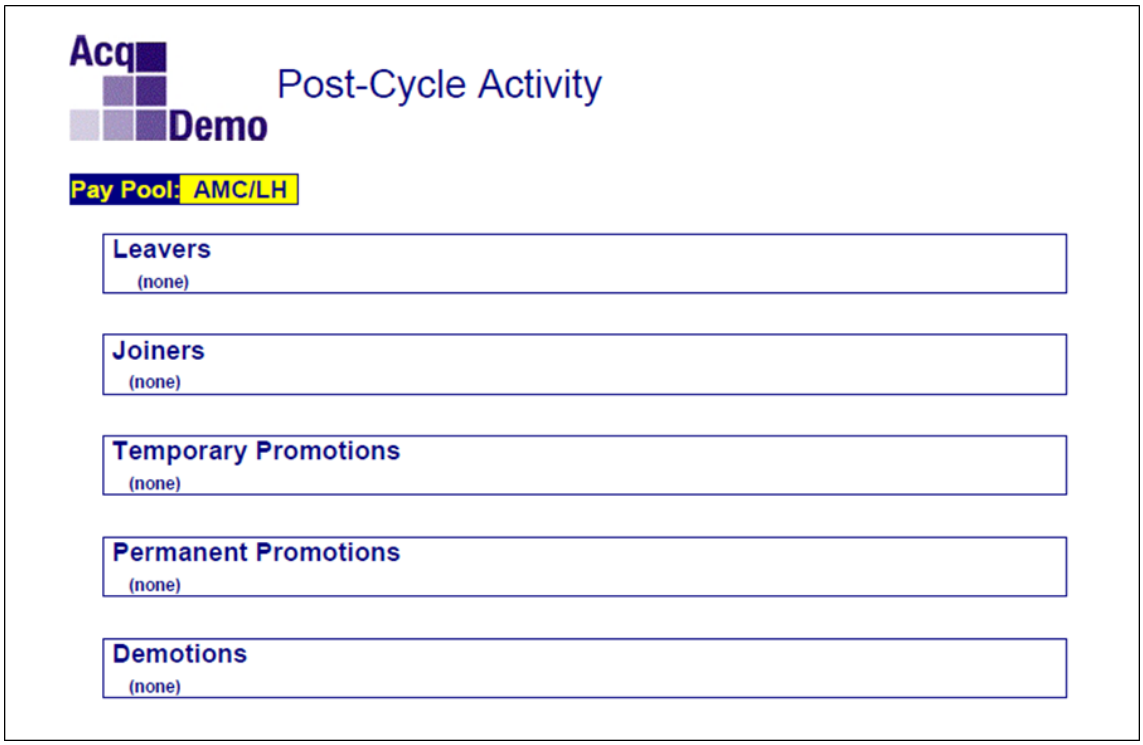
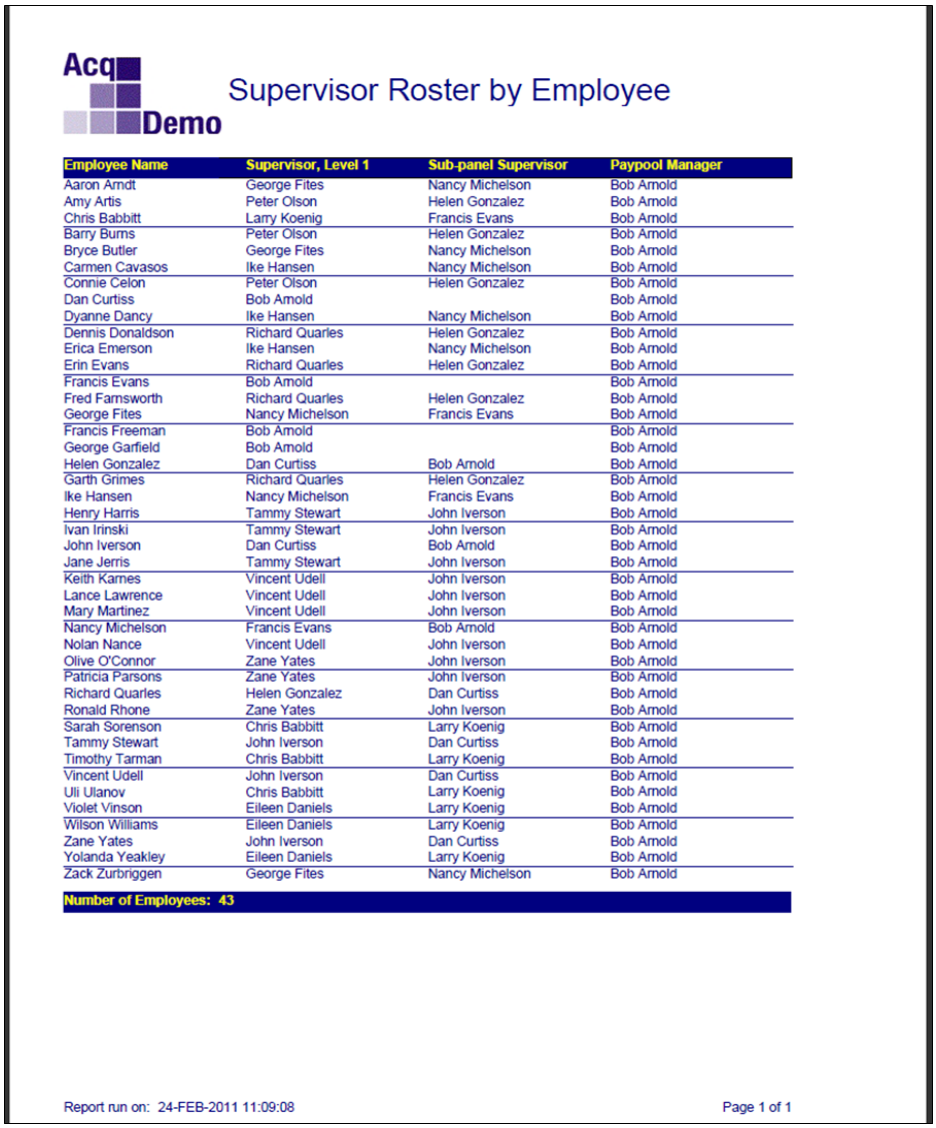


Figure 10-28: Post Cycle Activity Report

10.2.14 Supervisor Roster by Employee Report

Presents a list of employees and their supervisor.

Figure 10-29: Supervisor Roster by Employee Report Selection



Acq Demo

Supervisor Roster by Employee

Employee Name	Supervisor, Level 1	Sub-panel Supervisor	Paypool Manager
Aaron Arndt	George Fites	Nancy Michelson	Bob Arnold
Amy Artis	Peter Olson	Helen Gonzalez	Bob Arnold
Chris Babbitt	Larry Koenig	Francis Evans	Bob Arnold
Barry Burns	Peter Olson	Helen Gonzalez	Bob Arnold
Bryce Butler	George Fites	Nancy Michelson	Bob Arnold
Carmen Cavasos	Ike Hansen	Nancy Michelson	Bob Arnold
Connie Celon	Peter Olson	Helen Gonzalez	Bob Arnold
Dan Curtiss	Bob Arnold		Bob Arnold
Dyanne Dancy	Ike Hansen	Nancy Michelson	Bob Arnold
Dennis Donaldson	Richard Quarles	Helen Gonzalez	Bob Arnold
Erica Emerson	Ike Hansen	Nancy Michelson	Bob Arnold
Erin Evans	Richard Quarles	Helen Gonzalez	Bob Arnold
Francis Evans	Bob Arnold		Bob Arnold
Fred Farnsworth	Richard Quarles	Helen Gonzalez	Bob Arnold
George Fites	Nancy Michelson	Francis Evans	Bob Arnold
Francis Freeman	Bob Arnold		Bob Arnold
George Garfield	Bob Arnold		Bob Arnold
Helen Gonzalez	Dan Curtiss	Bob Arnold	Bob Arnold
Garth Grimes	Richard Quarles	Helen Gonzalez	Bob Arnold
Ike Hansen	Nancy Michelson	Francis Evans	Bob Arnold
Henry Harris	Tammy Stewart	John Iverson	Bob Arnold
Ivan Irinski	Tammy Stewart	John Iverson	Bob Arnold
John Iverson	Dan Curtiss	Bob Arnold	Bob Arnold
Jane Jerris	Tammy Stewart	John Iverson	Bob Arnold
Keith Karnes	Vincent Udell	John Iverson	Bob Arnold
Lance Lawrence	Vincent Udell	John Iverson	Bob Arnold
Mary Martinez	Vincent Udell	John Iverson	Bob Arnold
Nancy Michelson	Francis Evans	Bob Arnold	Bob Arnold
Nolan Nance	Vincent Udell	John Iverson	Bob Arnold
Olive O'Connor	Zane Yates	John Iverson	Bob Arnold
Patricia Parsons	Zane Yates	John Iverson	Bob Arnold
Richard Quarles	Helen Gonzalez	Dan Curtiss	Bob Arnold
Ronald Rhone	Zane Yates	John Iverson	Bob Arnold
Sarah Sorenson	Chris Babbitt	Larry Koenig	Bob Arnold
Tammy Stewart	John Iverson	Dan Curtiss	Bob Arnold
Timothy Tarman	Chris Babbitt	Larry Koenig	Bob Arnold
Vincent Udell	John Iverson	Dan Curtiss	Bob Arnold
Uli Ulanov	Chris Babbitt	Larry Koenig	Bob Arnold
Violet Vinson	Eileen Daniels	Larry Koenig	Bob Arnold
Wilson Williams	Eileen Daniels	Larry Koenig	Bob Arnold
Zane Yates	John Iverson	Dan Curtiss	Bob Arnold
Yolanda Yeakley	Eileen Daniels	Larry Koenig	Bob Arnold
Zack Zurbriggen	George Fites	Nancy Michelson	Bob Arnold

Number of Employees: 43

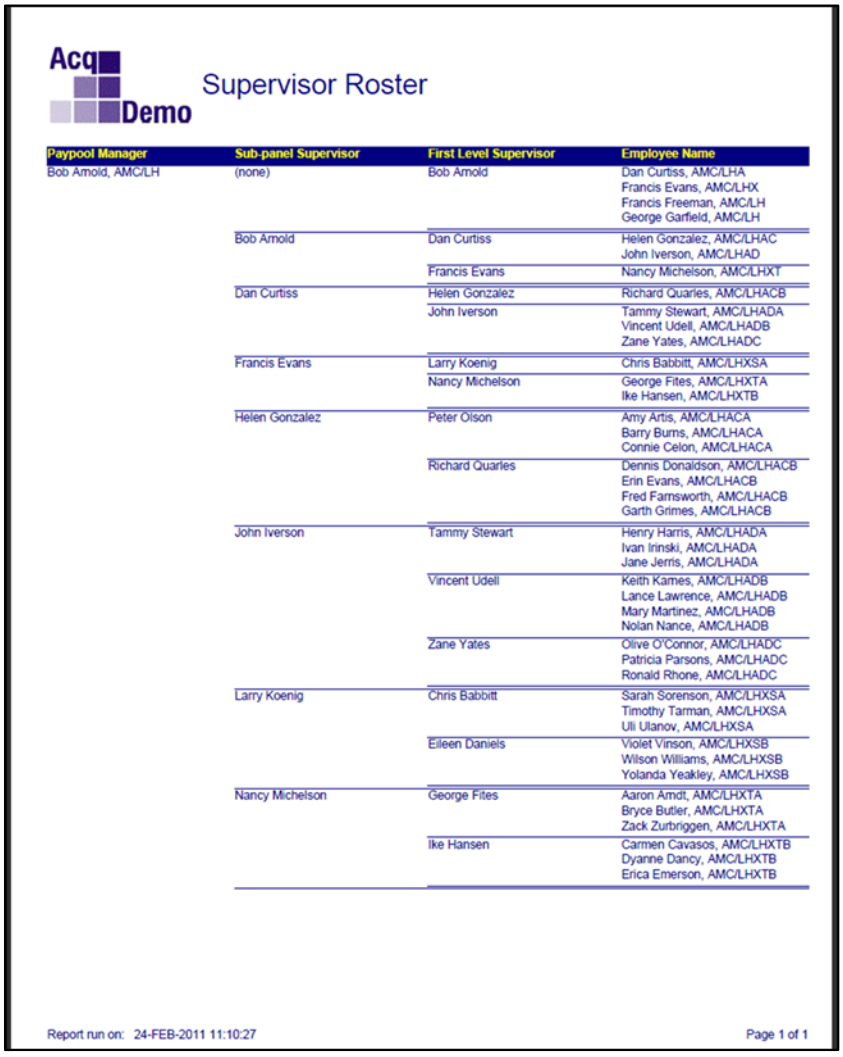
Report run on: 24-FEB-2011 11:09:08 Page 1 of 1

Figure 10-30: Supervisor Roster by Employee Report

10.2.15 Supervisor Roster by Supervisor Report

Presents a list of a supervisor breakdown by supervisors, listing their employees.

Figure 10-31: Supervisor Roster by Supervisor Report Selection



Acq Demo

Supervisor Roster

Paypool Manager	Sub-panel Supervisor	First Level Supervisor	Employee Name
Bob Arnold, AMC/LH	(none)	Bob Arnold	Dan Curtiss, AMC/LHA Francis Evans, AMC/LHX Francis Freeman, AMC/LH George Garfield, AMC/LH
	Bob Arnold	Dan Curtiss	Helen Gonzalez, AMC/LHAC John Iverson, AMC/LHAD
		Francis Evans	Nancy Michelson, AMC/LHXT
	Dan Curtiss	Helen Gonzalez	Richard Quarles, AMC/LHACB
		John Iverson	Tammy Stewart, AMC/LHADA Vincent Udell, AMC/LHADB Zane Yates, AMC/LHADC
	Francis Evans	Larry Koenig	Chris Babbitt, AMC/LHXSA
		Nancy Michelson	George Fites, AMC/LHXTA Ike Hansen, AMC/LHXTB
	Helen Gonzalez	Peter Olson	Amy Artis, AMC/LHACA Barry Burns, AMC/LHACA Connie Celon, AMC/LHACA
		Richard Quarles	Dennis Donaldson, AMC/LHACB Erin Evans, AMC/LHACB Fred Farnsworth, AMC/LHACB Garth Grimes, AMC/LHACB
	John Iverson	Tammy Stewart	Henry Harris, AMC/LHADA Ivan Irinski, AMC/LHADA Jane Jerris, AMC/LHADA
		Vincent Udell	Keith Kames, AMC/LHADB Lance Lawrence, AMC/LHADB Mary Martinez, AMC/LHADB Nolan Nance, AMC/LHADB
		Zane Yates	Olive O'Connor, AMC/LHADC Patricia Parsons, AMC/LHADC Ronald Rhone, AMC/LHADC
	Larry Koenig	Chris Babbitt	Sarah Sorenson, AMC/LHXSA Timothy Tarman, AMC/LHXSA Uli Ulanov, AMC/LHXSA
		Eileen Daniels	Violet Vinson, AMC/LHXSB Wilson Williams, AMC/LHXSB Yolanda Yeakley, AMC/LHXSB
	Nancy Michelson	George Fites	Aaron Arndt, AMC/LHXTA Bryce Butler, AMC/LHXTA Zack Zurbriggen, AMC/LHXTA
		Ike Hansen	Carmen Cavasos, AMC/LHXTB Dyanne Dancy, AMC/LHXTB Erica Emerson, AMC/LHXTB

Report run on: 24-FEB-2011 11:10:27

Page 1 of 1

Figure 10-32: Supervisor Roster by Supervisor Report

10.2.16 Zone A/CIP Report

Displays a Zone A/CIP diagram displaying if an employee's OCS is 6-8 points lower than their expected OCS.

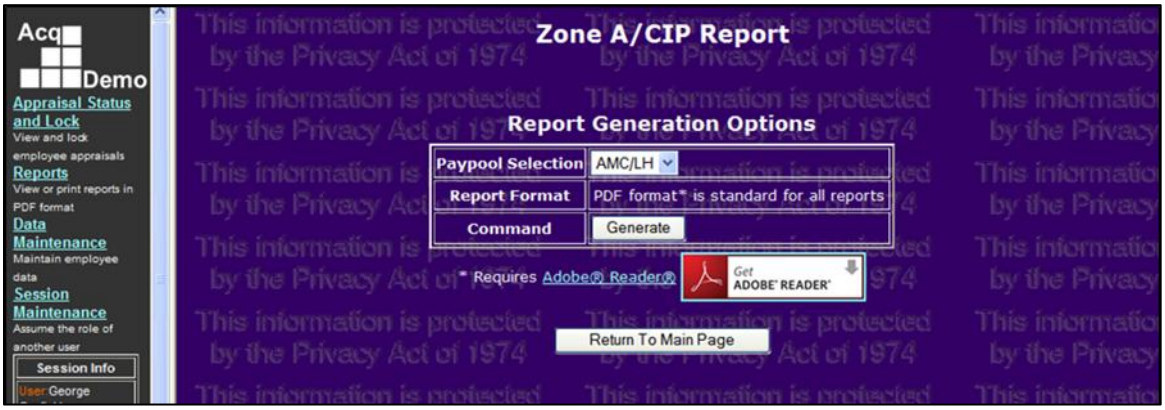


Figure 10-33: Zone A/CIP Report Selection

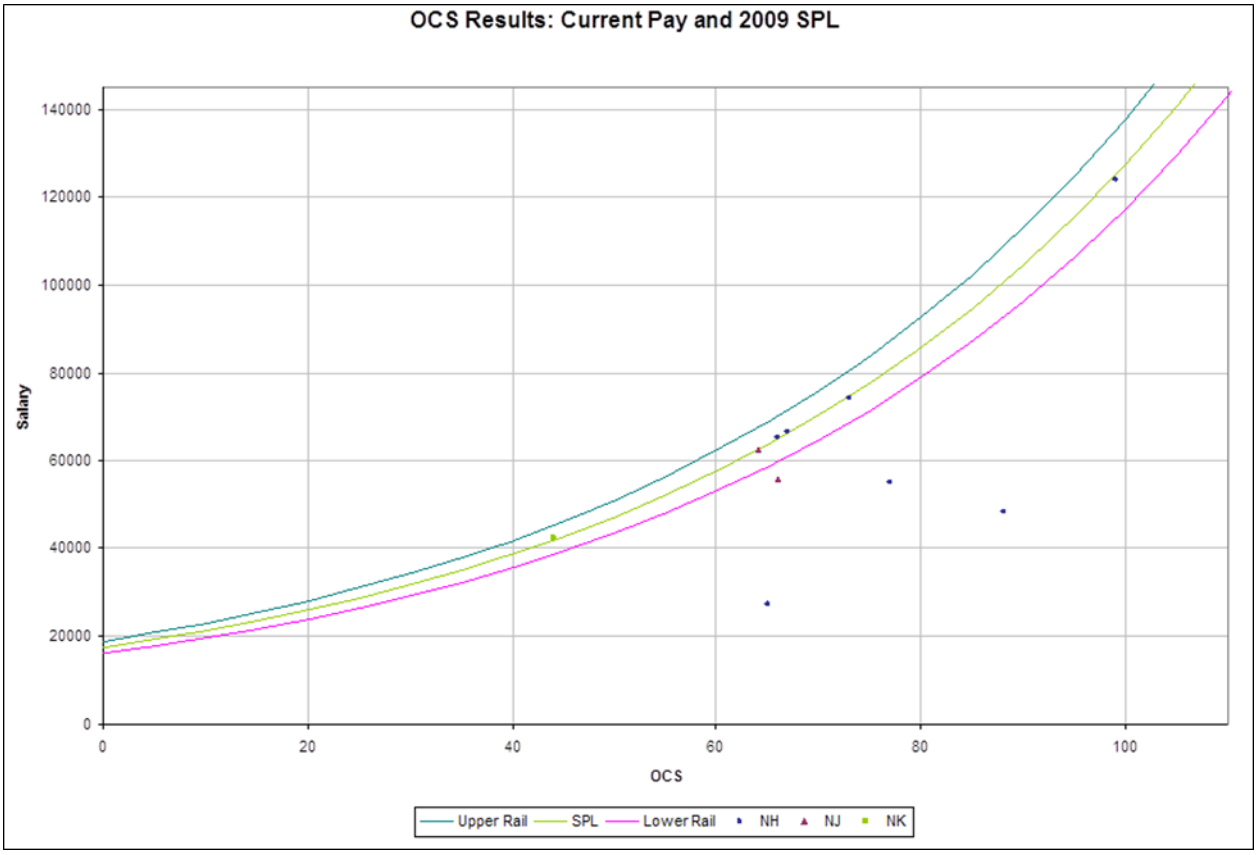


Figure 10-34: Zone A/CIP Report