

Managing User a	nd Per	rsonas	
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Application Section: Organization Manag	ement	User Roles: User I	Manager
Applies to Organizations: Adjudication, A Review, Authorize	ppeals, Continue	ous Vetting, Compo	nent Adjudication, Interim, Screening, SSC, FSO,
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Related Documents: Managing User Assignment Templates (JA Managing User Levels (JA-027) User Role Matrix (REF-006)	A-028)		

Purpose: User Managers create and manage users in their specific organization.

Search and Create a User & Persona

Search for a User

- 1. From the left navigation menu, select **Org Management**.
- 2. Select the Users tab.

United Stat	tes Departmer artment of State	nt of State ★					Search & Switch Org,
Organization	Users Config.	iration					
User List							Create User
Search on one o	or more fields at a time (Fo	<i>II SSN with or without das</i> Include Users in My Hie	<i>hes, Last 4 of SSN</i> , rarchy	First Name, Last Name, Organization, Team, .	Persona Name, and Email).		
SSN (Last 4)	Last Name	7 First Name	∀ Status ∀	Organization \triangledown Team	▽ Persona Name ▽	Email 🛛	Actions
4232	Cane	Timothy	Active	United States De	usds	timothy.cane@g	1
3423	cloud	Jett	Active	United States De	usds	jett@gmail.com	1
5654	Doe	John	Active	United States De	usds	john.doe@gmail.c	4
4832	Nye	Bill	Active	United States De	usdf	fake@gmail.com	1
9721	ross	BOB	Active	United States De	usdf	bob.ross@gmail.c	1

Figure 1: User Management



This document does not contain Personable Identifiable Information (PII), all sample data shown was created for instructional purposes only





- 3. From the right, select Create User button.
- 4. In the SSN Search text box, enter the user's social security number and select **Continue**. If the user *does not* exist in the system, the Create User screen displays.

Create a User

5. Fill in the required user information under **User Profile.**

<u>Note</u>: The SSN and Date of Birth are required for the user's initial CAC enrollment. Please ensure they are entered correctly to prevent further issues. User Managers will be able to modify the SSN and DOB after the user is created.

User Profile				
Personally Identifiable	Information			
Social Security Number*	Date of Birth*			
678-23-4233	mm/dd/yyyy			
Last Name*	First Name*	Middle Name	Suffix	
Enter Last Name	Enter First Name	Enter Middle Name	Select suffix 🗸	
Personas				
croonas				
Please click 'Continue' to add a	persona to this user. A persona allows	users to have capabilities within i	he system.	

Figure 2: Create User

6. After filling out all user information, select **Continue** to create a persona to add a user.

<u>Note</u>: A Persona represents an account with its roles and privileges that the user will have for the org(s) associated to the persona. A persona will also represent an account the user will use to login to the system. A user can have multiple personas that are associated to multiple orgs.







Create a Persona

1. In the Manage Persona tab, a user manager can enter the required information for the Persona.

Add Persona Kelly, Washington		
Info. Please fill of	ut all required 'Settings' fields and select at least one User Role per Organizatio	n.
Manage Persona Settings Manage	User Assignments	
Persona Settings 💿		View Permission/Role Descriptions
Persona Name* Enter Persona Name		
Primary Phone Number*	Primary Email Address * e.g. someone@email.com	
Notification Preferences Internal Email		
Time Zone America/New_York Attachments	\checkmark	
/ Attachments		

Figure 3: Manage Persona Settings

Note: Persona Name cannot be changed once the Persona is created.

2. Select a **Notification Preference** option. The **Internal** option displays notification alerts in the top right corner of the application. The **Email** option will route notifications to the primary email address entered for the user.

Note: Additional Phone numbers and Emails can be included after the primary is entered.

- 3. Select the **Time Zone** drop-down below notification preferences and ensure the correct time zone is set for the persona.
- 4. Select **Add Attachment** to upload required documents for the persona, and then fill in the required attachment fields.

Required Documents:

- Cyber Awareness Training Certificate
- PII Training Certificate
- SAAR File





5. The organization context should be pre-populated based on the org in which the User Manager is creating the Persona. Select the **roles** the user will be granted within the organization.

 Hope's Peak Military Base 		
Organization Name Hope's Peak Military Base	Team Name Junior Authorizers	Organization User Status
User Roles		
System Manager	Notification Manager	✓ Team Structure Manager
✓ Org Assignment Manager	 Org Workload Manager 	Vorkflow Manager
✓ Org Manager	✓ User Manager	Subject Manager
Subject Profile Editor	Team Manager	✓ Mass Initiator
Reviewer	✓ Adjudicator	✓ Task Reassignment
✓ Program Tag Manager	✓ Authorizer	✓ Org Relationship Manager
Case Processor	Subject Viewer	Onboarding Manager
✓ Operations Manager	Appeals Processor	Special Security Officer
Polygraph	Order Form Template Manager	VBIS Financial Manager
+ Add Organization		

Figure 4: Manage Persona Settings

Note: In the Image Above, there are roles shown that may not be available to your organization types

6. To add the user to an additional organization, select **Add Organization**. A modal will appear where you can search for an organization to add. The list of available roles within the organization will display to be selected.

Note: You must select at least one role for each organization.

Note: The Org User Status is enabled by default.

7. Select **Manage User Assignments** tab and fill in the required information related to managing the types of tasks users can be assigned based on certain task attributes.

Manage Persona Settings Manage User	Assignments			
User Assignments 💿				
Organization Department of Education	Velect User Level	~	User Assignment Template Select Apply Templ	ate
User Capacity (?) Assignment e.g. 10 e.g. 5	 Bundle Assignments Enabled 			
 Assignment 1 				١
Assignment Name Enter Assignment Name	Phase Select Phase V			
Case Types	Program Tags			
Assignment Method Manually Assign to a Capable User	0			
O Automatic and/or Manual Assignment				
The Add Assignment hyperlink adds a new use	r assignment within this template.			
Cancel			Complete Use	r Profile







8. From the **Organization** drop-down select your desired organization. This allows you to specify capabilities for each of the organizations a persona is associated.

<u>Note</u>: The **Organization** field will become a dropdown if the user has multiple organizations on their persona. Make sure the correct organization is selected before making changes and to make sure the correct User Assignment Templates are populated.

9. For the selected organization, select a **User Level** and apply any **User Assignment Templates**, if applicable.



10. If the receiver will be receiving automatically assigned work, configure the **User Capacity** and **Threshold Values**.

Notes:

- User Capacity sets the maximum number of cases a persona may be automatically assigned.
- **Threshold** sets the minimum number of cases a persona can have in their worklist until the system queries for cases that match the persona's capabilities and adds cases to the user's worklist up to the capacity.
- Capacity and Threshold are required if the Automatic and/or Manual Assignment method is selected for an assignment.
- A user can be manually assigned cases that may exceed their User Capacity if the Manually Assign to a Capable User button is selected.
- Automatic Assignment Occurs when the User Logs into NBIS if they are below Capacity, or when the Assigned cases reached the Threshold Value.
- 11. (CV ONLY) For users working CV alerts and cases, select the **Bundle Assignments** checkbox to group assignments for each subject.
- 12. Select **Add Assignment** to add an assignment to the persona. Multiple assignments can be added per organization.
 - a. Select the **Phase** for the assignment. The phase determines what phase of the case the user can work on.

Note: Additional fields may populate depending on the phase selected.

- b. Select the **Assignment Method** for the user assignment. Capable means that the persona can access and work on a case with certain attributes, but only if they are manually assigned the case, not through automatic assignment. System Assigned means that the persona can work on and will be automatically assigned the case or task.
- c. Select the appropriate **Case Type** options for the persona. This section indicates the types of cases or tasks you want the user to be capable of working on
- d. (ADJ/CV ONLY) Select the appropriate Workflow Status options for the persona. This section indicates the statuses for the selected case type a user is capable of working in.
- e. **(CV ONLY)** Select the appropriate **Priority** options for the persona. This section indicates the CV Priorities a user is capable of working in.
- f. Select any applicable Program Tags needed for this assignment configuration.





13. At the bottom right of the User Profile, select **Complete User Profile** to finish creating the persona and add the user to your organization.

After creation, the user will receive two emails to the primary email address entered in the Manage Persona Settings section. The emails will contain instructions and links for the user to complete Certificate Enrollment procedures and gain access to the NBIS Enterprise Portal.

Viewing a User and Actions

1. In Org Management, select the **Users** tab to view a list of users within the selected Organization.

Organization	Users Co	nfiguration						
User List								Create User
Search on one o	or more fields at a tir	me (Full SSN with or	<i>without dashe</i> s in My Hierar	rs, Last 4 of SSN, First	t Name, Last	Name, Organization, Tea	m, Persona Nan	ne, and Email).
Search	~		s in high riter a	(ch)				
SSN (Last 4)	Last Name 🛛 🖓	First Name 🛛 🖓	' Status ♡	Organization♡	Team	𝔅 Persona Name𝔅	Email 🖓	Actions
SSN (Last 4) 8787	Last Name 🛛 🏹	First Name 🛛 Joseph	′ Status ▽ Active	Organization □ Department	Team	♥ Persona Name ↓ doee	Email \bigtriangledown josephada	Actions

Figure 1: User Management

- 2. From the **Actions** column, select the **ellipses** next to the user row you wish to view, then select **View Details**.
- 3. Select the Persona Name to view the specific persona details.

Reset Authentication for Personas

Persona authentication resets are required if certificate enrollment fails or if a CAC/PIV card is changed.

- 4. From the Actions column, select the ellipses next to the persona.
- Select Reset Authentication to re-enroll a persona and restart their authentication process if necessary. If the emails are sent to the persona successfully, there will be a message indicating so. Otherwise, a failure message will appear.

Personally identifiable information Contraction Contractic Contraction Contractic Contra	User Profile	Information				La de este de la televerent
Backed J Security Number Date of Birth 01/01/1991 Last Name Suffix Persona Persona Status Date Created NBIS Enabled 11/05/2021 11/05/2021	Personally Identifiable	Information			/ Edit Personal	ly identifiable informati
Persona Persona Status Date Created Last Updated Acc NBIS Enabled 11/05/2021 11/05/2021 Reset Authentication	Social Security Number Last Name Smith	Date of Birth 01/01/1991 First Name John	Middle Name	Suffix		
Persona Name Persona Status Date Created Last Updated Ac NBIS Enabled 11/05/2021 11/05/2021 Reset Authentication	Personas					+ Add Pers
NBIS Enabled 11/05/2021 11/05/2021 Reset Authentication	Persona Name		Persona Status	Date Created	Last Updated	Actio
Reset Authentication	NBIS		Enabled	11/05/2021	11/05/2021	:
						eset Authentication









Disable Persona

- 6. From the Actions column, select the ellipses next to the persona.
- 7. Select **Disable** to disable a persona, which will apply to all organizations they are part of. The **Enable** option will appear once a persona is disabled if you want to re-enable it. A pop-up will appear displaying all tasks assigned to the persona
- 8. From the **Reason for Disabling Persona**, select a **Reason** and enter an **Explanation**.

Disable P	ersona			×
Task ID	Case type	∀ Status	マ Tasl マ Dat	k Assignment _{\vert}
No work as	signed			
You are abou Please provid Reason for D Select Reaso	t to disable this per le a reason for disab isabling Persona * on for Disabling Pe	sona. oling this persona. ersona		~
Explanation				
Enter Expla	nation			
				Continue

Figure 3: Disable Persona Pop-up



If you Disable a persona, all cases in that user's worklist for their organization will return to their respective organization workbasket.

9. Select Continue.







Editing a User

Edit User PII

1. In the User Profile, select Edit Personally Identifiable Information.

User Profile			
Personally Identifiable In	formation		
Social Security Number*	Date of Birth *		
345-32-2345	11/11/1999		
Last Name*	First Name*	Middle Name	Suffix
Doe	Jane	Enter Middle Name	Select suffix 🗸

Figure 1: Edit User Profile PII

2. Make the changes and select **Save**.

Edit User Persona Information

- 1. In the User Profile, select a **Persona Name** to edit.
- 2. From the bottom right of the Persona screen, select **Edit** to edit the persona details, add attachments, edit the org associations and roles, or edit the assignments.



When editing user assignments, it is up to the **Org Workload Manager** to remove any cases from the user they should no longer be able to access.

3. Select **Save** to save the changes.

