



Managing User and Personas

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File ID: JA-042

Application Section: Organization Management

User Roles: User Manager

Applies to Organizations: Adjudication, Appeals, Continuous Vetting, Component Adjudication, Interim, Screening, SSC, FSO, Review, Authorize

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Related Documents:

Managing User Assignment Templates (JA-028)

Managing User Levels (JA-027)

User Role Matrix (REF-006)

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.

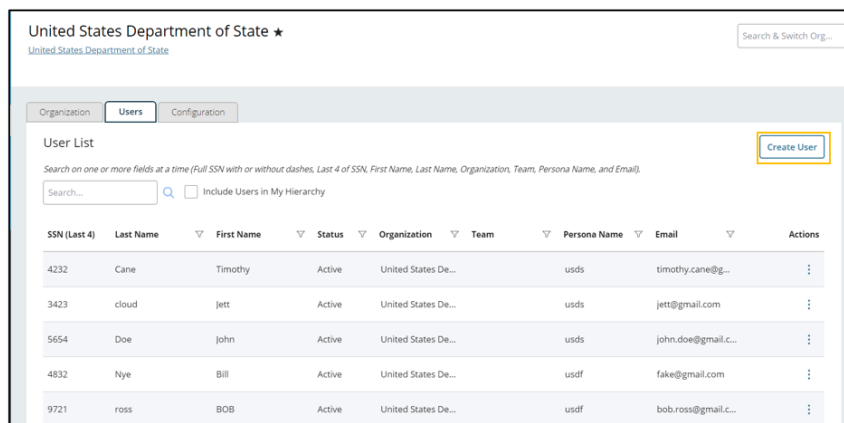


Figure 1: User Management





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**.

Note: 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.

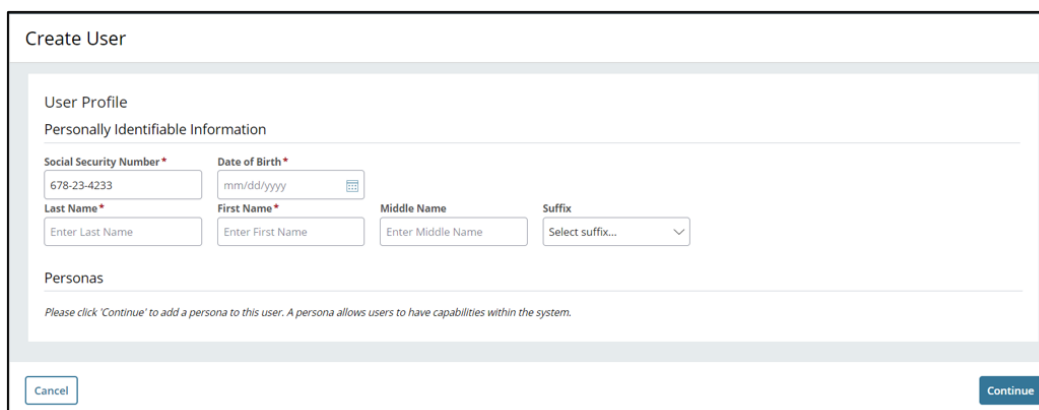


Figure 2: Create User

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

Note: 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.

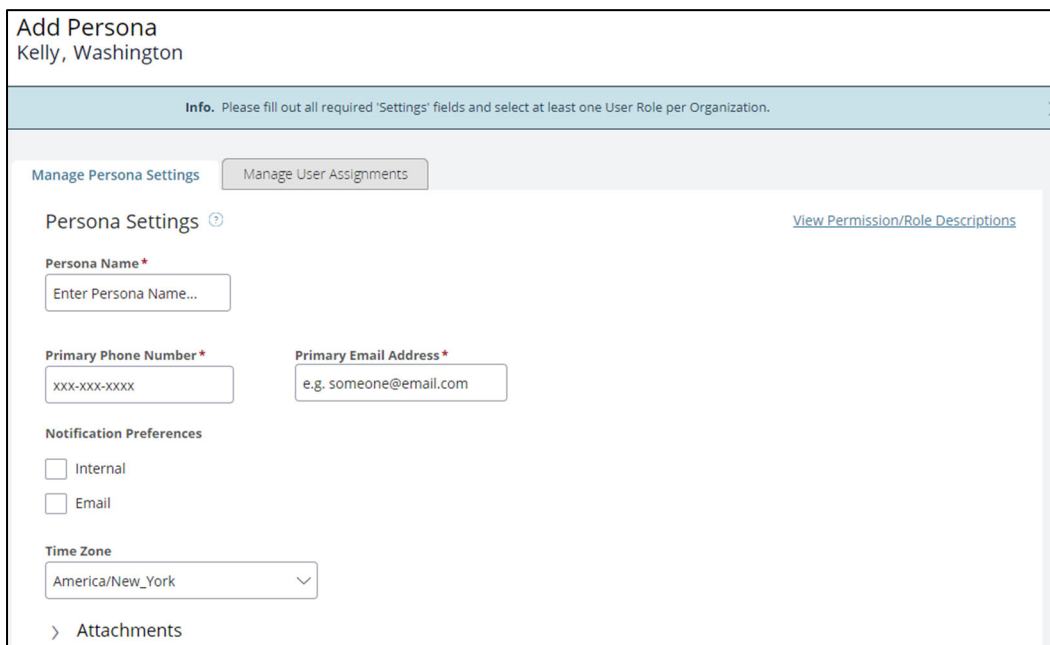


Figure 3: Manage Persona Settings

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



- 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.

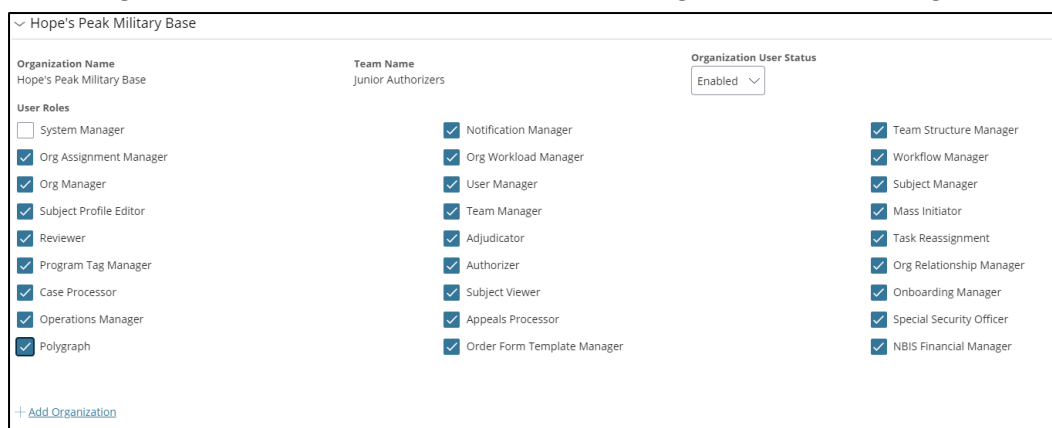


Figure 4: Manage Persona Settings

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

- 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.

- 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.

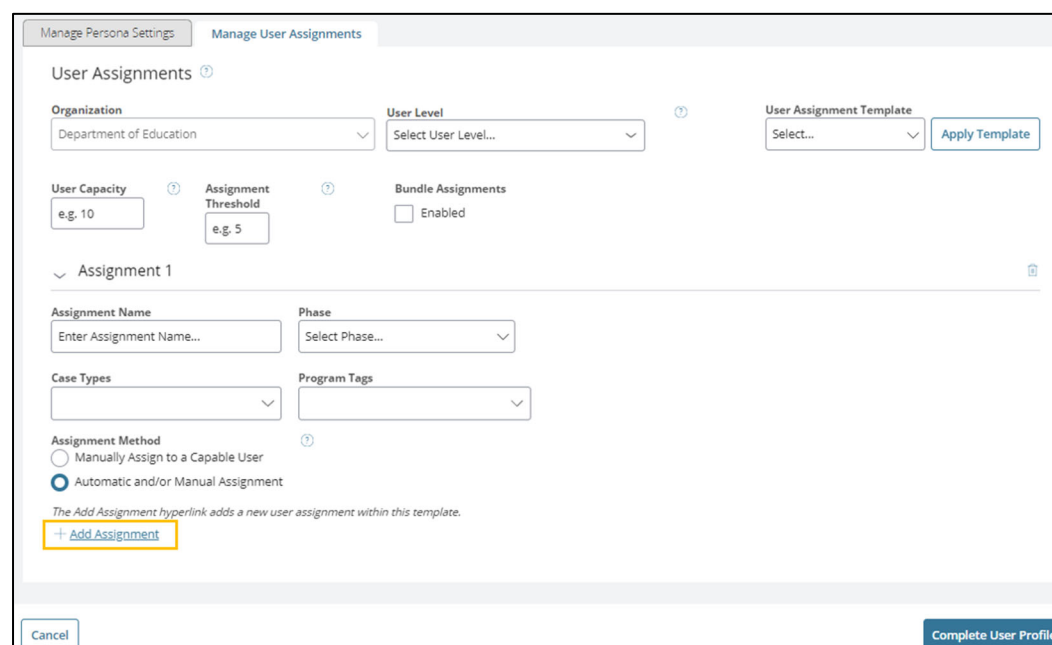


Figure 5: Manage User Assignments



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.

Note: 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.

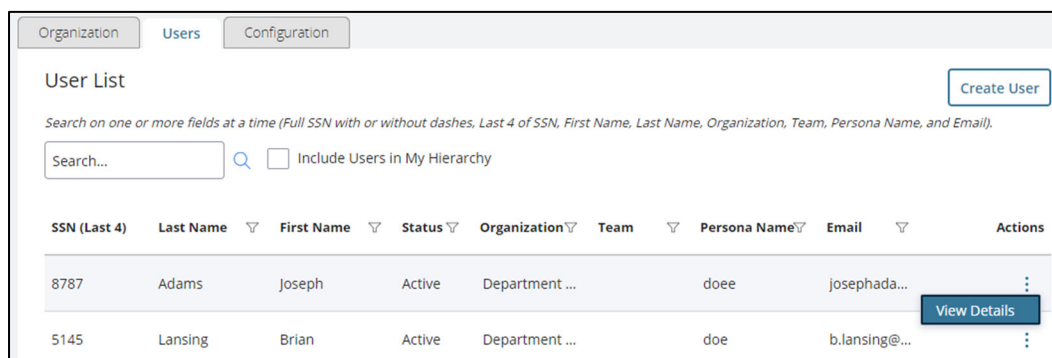


- At the bottom right of the User Profile, select **Complete User Profile** to finish creating the persona and add the user to your organization.

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

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



The screenshot shows the 'Users' tab in the 'Organization' management section. It includes a 'User List' with a search bar and a 'Create User' button. Below the search bar is a table with columns: SSN (Last 4), Last Name, First Name, Status, Organization, Team, Persona Name, Email, and Actions. Two users are listed: Joseph Adams (SSN 8787) and Brian Lansing (SSN 5145). The 'Actions' column for each user has a dropdown menu with a 'View Details' button.

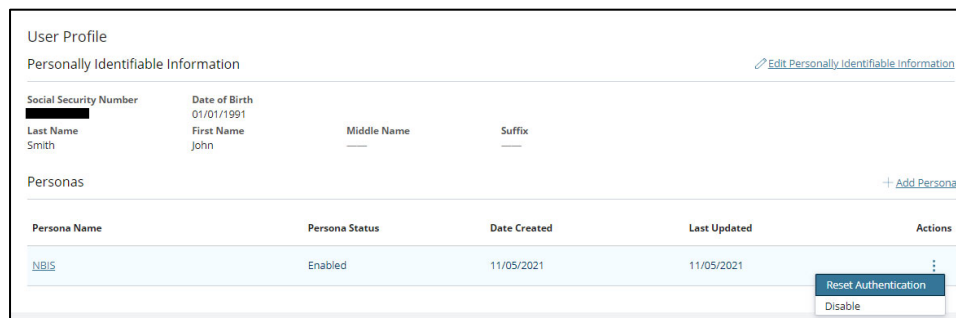
Figure 1: User Management

- From the **Actions** column, select the **ellipses** next to the user row you wish to view, then select **View Details**.
- 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.

- 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.



The screenshot shows the 'User Profile' page for a user named John Smith. It displays 'Personally Identifiable Information' including Social Security Number, Date of Birth, and Name. Below this is a 'Personas' section with a table showing one persona: NBIS. The persona is 'Enabled' and was created/updated on 11/05/2021. The 'Actions' column for the persona has a dropdown menu with 'Reset Authentication' and 'Disable' options.

Figure 2: User Profile Ellipses Menu



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**.

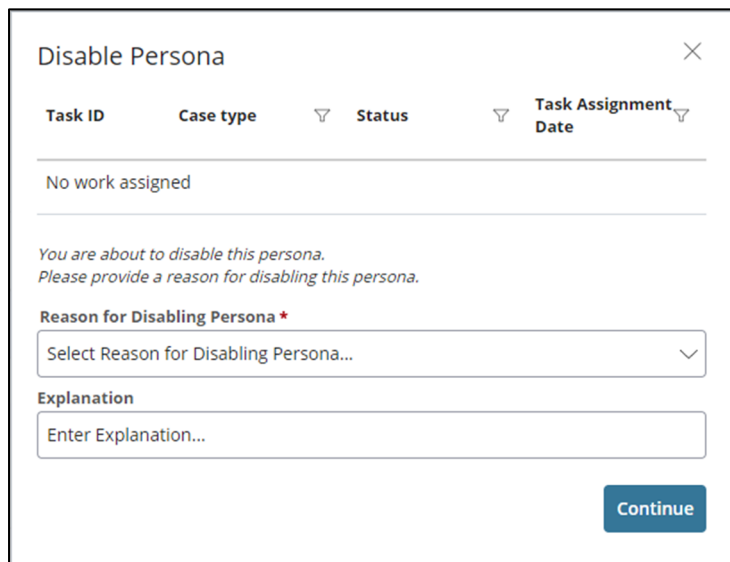


Figure 3: Disable Persona Pop-up



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**.

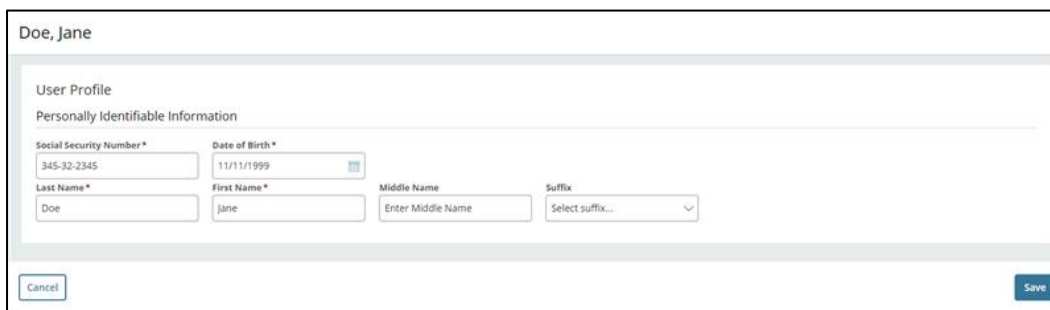




Editing a User

Edit User PII

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




The screenshot shows a web form titled 'Doe, Jane' with a 'User Profile' section. Under 'Personally Identifiable Information', there are fields for 'Social Security Number*' (345-32-2345), 'Date of Birth*' (11/11/1999), 'Last Name*' (Doe), 'First Name*' (Jane), 'Middle Name' (Enter Middle Name), and 'Suffix' (Select suffix...). There are 'Cancel' and 'Save' buttons at the bottom.

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.

	<p>A persona can be removed from an organization if they have no pending or assigned tasks. A persona is required to have at least one org and one role within the org.</p> <p>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.</p>
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3. Select **Save** to save the changes.

