



External Organization Migration

NBIS Release Version: 4.0

Updated Date: 05/23/2022

File ID: JA-040

Application Section: Organization Management

User Roles: Org Manager

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

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Related Documents:

Org Migration Impacts (REF-014)
Internal Org Migration (JA-039)

Purpose: External Migrations allow for organizations to migrate out of their immediate organization's hierarchy. Migrations must be completed in the context of the organization that will be migrating. Parent organizations cannot perform external migrations for their sub-orgs.

The steps for migration require both organizations, receiving and migrating, to work together to complete the process. The Receiving organization will be the new parent of the moving organization. The migrating org will be leaving its hierarchy and moving to a new one within NBIS.

Step 1 (Receiving Org) Generate the Import Code

1. From the left navigation menu, select **Org Management**.
2. Switch context to the receiving organization within the Organization Hierarchy.

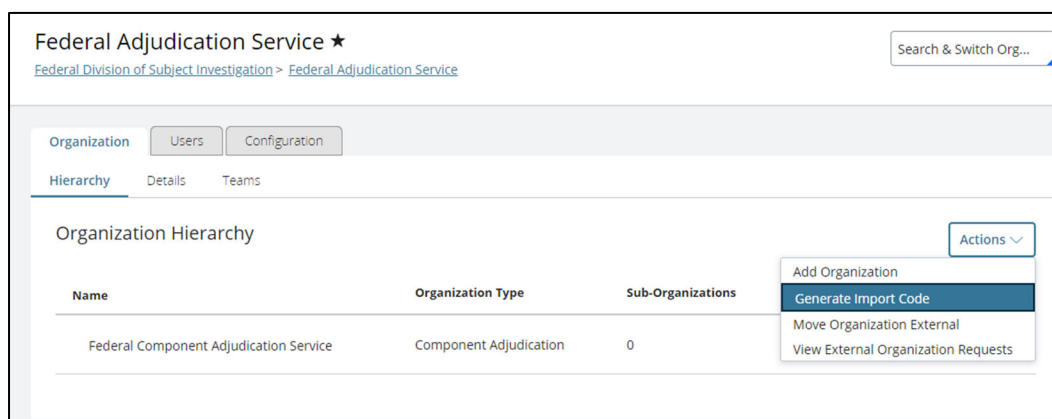


Figure 1: Org Management - Generate Import Code





3. As the receiving org, under the **Actions** drop-down, select **Generate Import Code** link to create the code to provide to the migrating org.

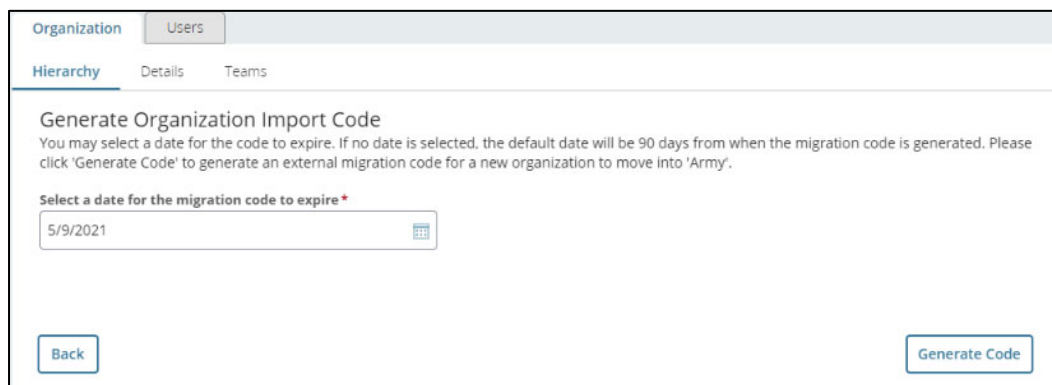


Figure 2: Generate Organization Import Code

Note: The expiration date is automatically set to 90 days, but it can be adjusted by selecting the calendar icon.

4. Select the **Generate Code** button.

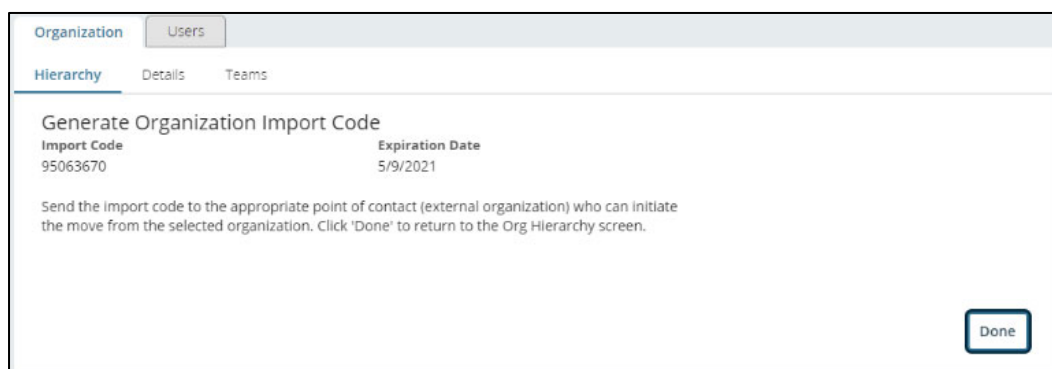


Figure 3: Import Code and Expiration Date

Note: Make a note of the Import Code and Expiration date and provide the code to the migrating org. They need this information to complete their portion of the migration.

5. Select **Done** and provide the migrating org the Import Code.





Step 2 (Migrating Org) Enter the Migration Code

1. From the left navigation menu, select **Org Management**.
2. Switch context to the organization that will be receiving the migrating Organizations within the Organization Hierarchy.
3. Under the **Actions** drop-down, select **Move Organization External** to input the Import Code provided by the receiving organization.

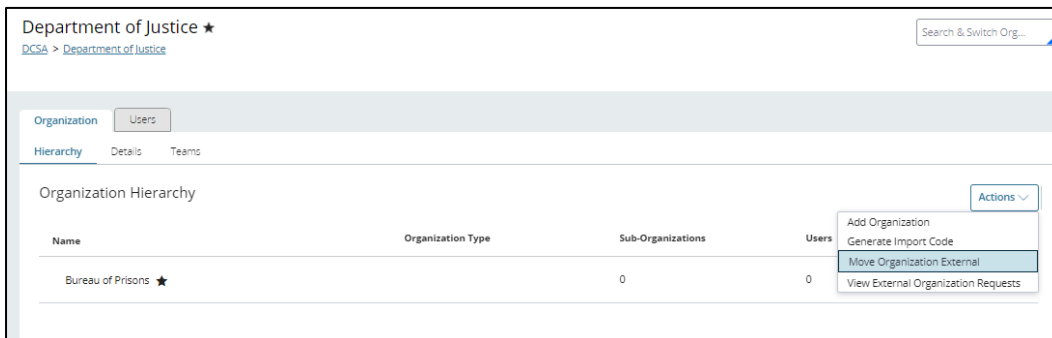


Figure 4: Org Management - Move Organization External

4. Enter the Import Code and select **Submit**.

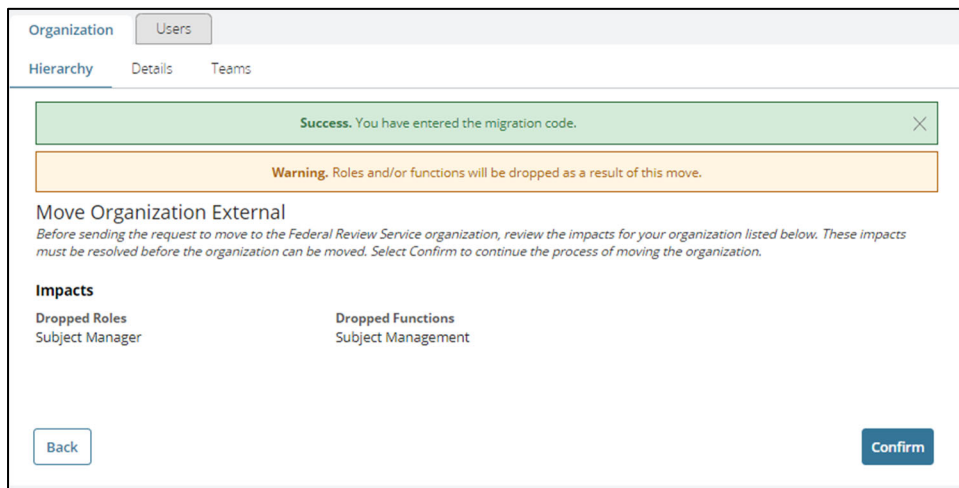
The screenshot shows the 'Move Organization External' form. It includes a title 'Move Organization External' and a subtitle 'Input the import code provided by the external organization.' Below this is a field labeled 'Import Code*' with a placeholder 'Enter Import Code'. At the bottom, there are 'Back' and 'Submit' buttons.

Figure 5: Enter Import Code





- It may give you a warning of impacted workflows or affected users. Select **Back** to adjust workflows, users, or roles/functions. Select **Confirm** to proceed. If you choose to go back and adjust the configuration, you will need to repeat Steps 1-4 to continue.



The screenshot shows a web interface for moving an organization. At the top, there are tabs for 'Organization' and 'Users', with 'Users' selected. Below these are sub-tabs for 'Hierarchy', 'Details', and 'Teams', with 'Hierarchy' selected. A green success message states: 'Success. You have entered the migration code.' Below this is an orange warning message: 'Warning. Roles and/or functions will be dropped as a result of this move.' The main heading is 'Move Organization External', followed by a paragraph: 'Before sending the request to move to the Federal Review Service organization, review the impacts for your organization listed below. These impacts must be resolved before the organization can be moved. Select Confirm to continue the process of moving the organization.' Under the heading 'Impacts', there are two columns: 'Dropped Roles' with 'Subject Manager' and 'Dropped Functions' with 'Subject Management'. At the bottom left is a 'Back' button and at the bottom right is a 'Confirm' button.

Figure 6: Move Organization External - with Warnings

Note: If there are Warnings, please review the warnings and the relevant information in **Reference File 014**. You may need to resolve the User/Role warning before the migration can take place. If impacted workflows are the only warnings, you can Confirm the migration and the workflow will be disabled.



Step 3 (Receiving Org) Confirm the Migration

1. From the left navigation menu, select **Org Management**.
2. Under the **Actions** drop-down, select **Import External Organization**.

Move Organization External
Roles will be removed upon migration of the organization. Before moving the organization, ensure both the accepting and receiving organizations have the same roles, or remove the roles. Workflow for the newly moved organization must be modified and enabled once migrated. The hierarchy preview for the migration is shown below.

| Name | Sub-Organizations | Organization Type | Users |
|--|-------------------|--|-------|
| ✓ Federal Government | 3 | SSC, Review, Authorize, Adjudication, Vetting | 0 |
| ✓ Executive Branch | 3 | SSC, Review, Authorize, Adjudication, Vetting | 0 |
| ✓ Department of Defense | 8 | SSC, Adjudication, Review, Authorize, Vetting, ISP | 9 |
| ✓ Central Intelligence Agency | 1 | Adjudication | 0 |
| Cybersecurity and Infrastructure Security Agency | 0 | Appeals | 0 |

Impacts

| Dropped Roles | Dropped Users | Dropped Functions |
|-------------------|---------------|---|
| Appeals Processor | Doe John | Appeals Request Appeals Request Provider |

☐ I understand the impacts caused from the move and I cannot undo this action. I want to proceed with the change.

Figure 7: Organization Hierarchy Preview

3. Confirm the location of the migrating org is correct in the receiving org's hierarchy and Select the **checkbox**, confirming the impacts and change.

Note: See [Reference File 014](#). if you are not able to **Move Organization** due to warning messages.

4. Select **Submit** to receive the migrating org. If you do not want to move ahead with the migration, select **Cancel** to restart the entire process.

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Search & Switch Org...

Organization Users Configuration

Hierarchy Details Teams

Organization Hierarchy

| Name | Organization Type | Sub-Organizations | Users | Actions |
|--|-------------------|-------------------|-------|---------|
| Cybersecurity and Infrastructure Security Agency ★ | SSC | 0 | 0 | ⋮ |

Figure 8: Organization Hierarchy Result