



NBIS Agency Configuration Interactions

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Overview

This document provides an overview of how different configurations interact together. For Agency (Initiate/Review/Authorize) organizations, configurations affect four end user areas of visible use:

- Subject
- Case
- NBIS User
- Organization

Organization configurations should be built first. These drive user configurations and eventually subject and case configuration and interactions.

See the diagram below for a basic visual overview of the configuration relationships and the next page for more detailed explanations.

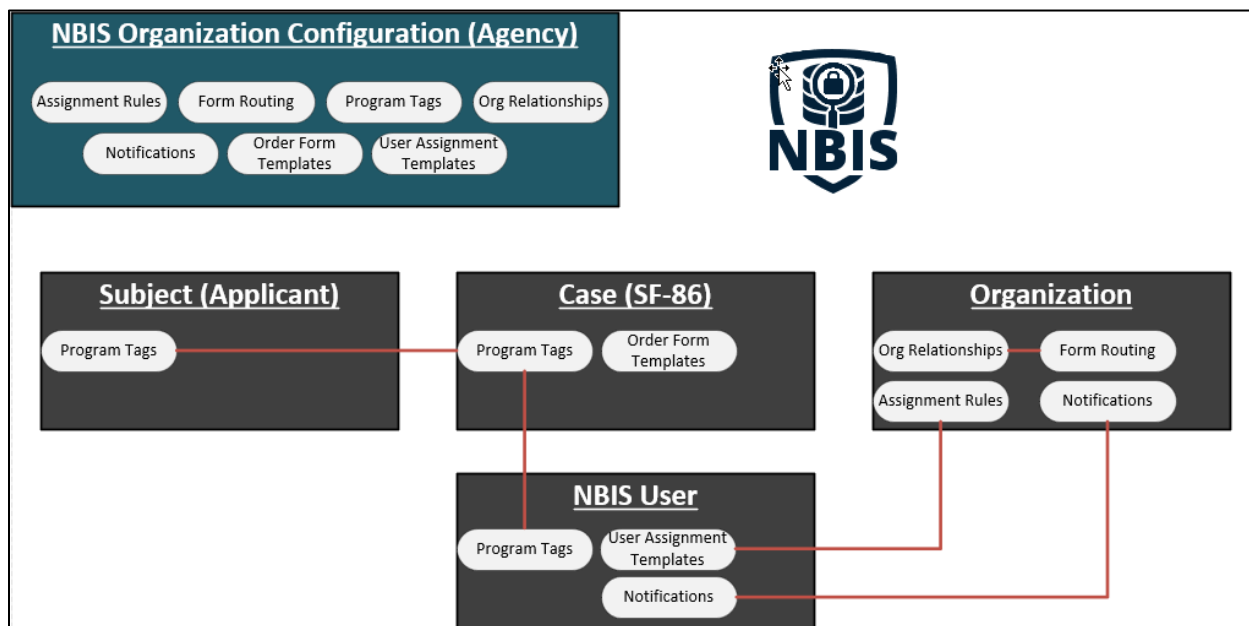


Figure 1: NBIS Agency Configuration Diagram





Organization Level Configurations

- **Org Relationships** – these allow an organization to share and receive services external to their own organization. (i.e., DCSA Adjudications or Vetting Risk Operations provides their service to another organization.)
- **Form Routing** – For initiating organizations, this allows you to specify routing for Review and Authorization of your subjects cases. These are selected by users when initiating.
- **Assignment Rules** – These are configured at the organization level to prioritize the work performed by the org. This includes specification of Case type, status, and program tags.
- **Notifications** – Notifications are configured for certain triggers at the organization level. These triggers include cases being assigned, cases moving into a status, or cases sitting stagnant. These can notify NBIS Users and the subject of actions happening within NBIS.
- **User Assignment Templates** – Used to make user provisioning easier by allowing creation of a template that can be applied to multiple users.
- **Program Tags** – Program tags are created or inherited by an organization and can be set to different levels of restrictions. These can be used in org configurations, user assignments (skillsets), and applied to subjects.

User Configurations

- Users have their notification preference configured on their profile; this determines how they receive notifications from NBIS. These can be delivered in the NBIS system and/or via email.
- User Assignments (skillsets) are the types of tasks/work a user is capable of working on. This includes case types, phases, statuses, and program tags.

Subject Configurations

- Program Tags are applied to subjects and their cases (if restrictive).

Case Configurations

The Case actions and assignment behaviors are determined by the user, subject, and org configurations.

- **Program Tags** – Restrictive program tags are inherited from the subject and only users with the same program tag will be able to work on or view their cases.
- **Order Form Templates** – These are configured for the organization and user selectable to allow prefilling of data within the Order Form.
- **Assignment** – The system considers, the User Assignment (skillset) configurations, Assignment Rules, and Program tags when assigning cases.
- **Form Routing** – Form routing defined at the organization level determines the path a case can take.
- **Notifications** – Case interactions trigger notifications that are built out at the organization level.

