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| 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.

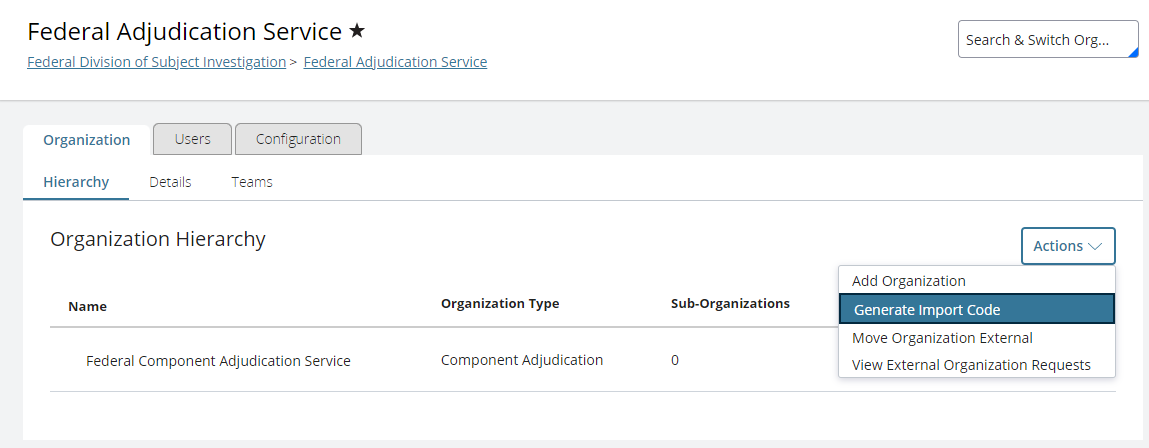


Figure : Org Management - Generate Import Code

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

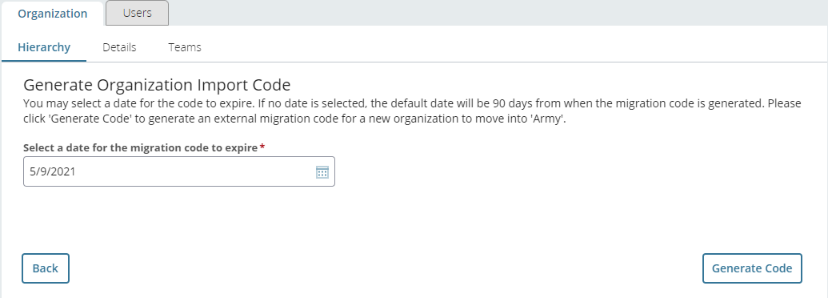


Figure : Generate Organization Import Code

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

1. Select the **Generate Code** button**.**

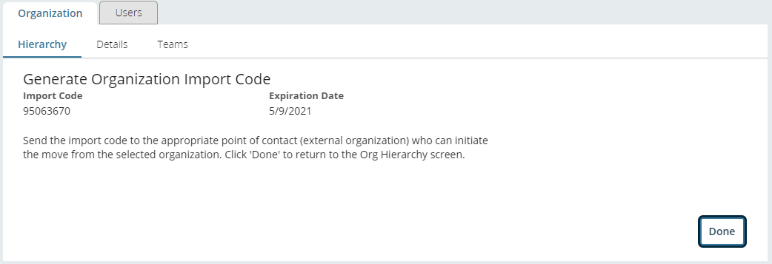


Figure : Import Code and Expiration Date

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.

1. 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.

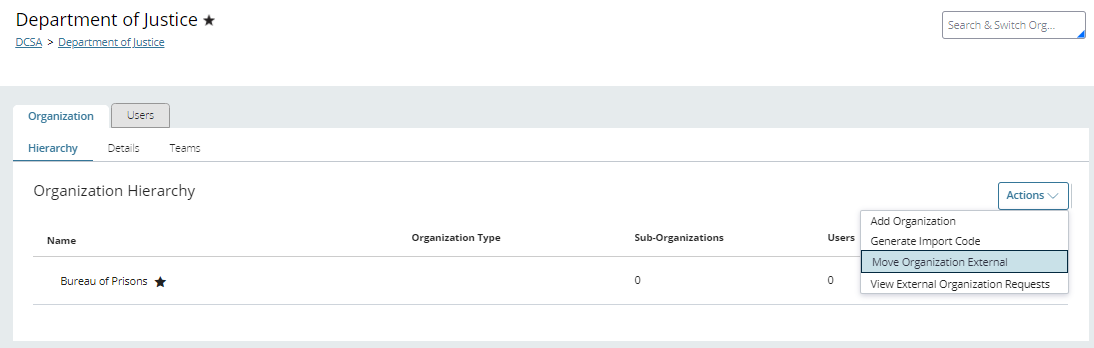


Figure 4: Org Management - Move Organization External

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

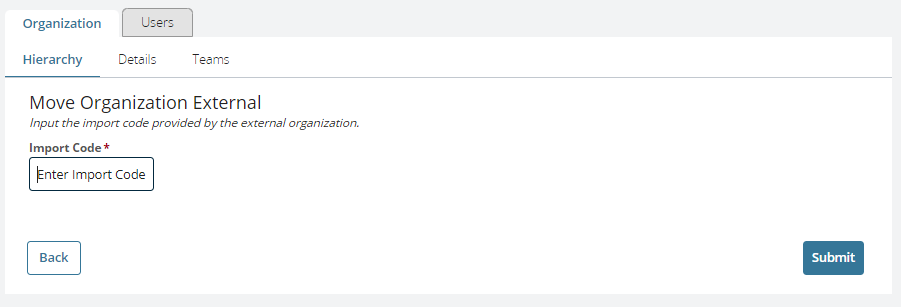


Figure 5: Enter Import Code

1. 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.

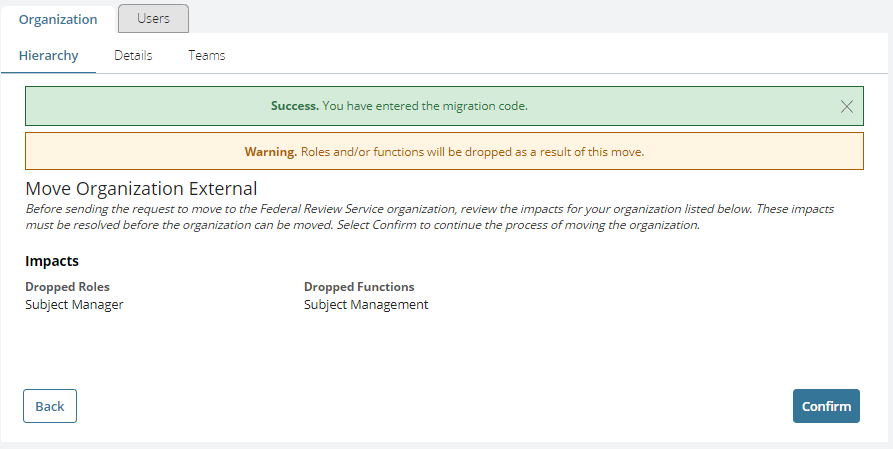


Figure 6: Move Organization External - with Warnings

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.**

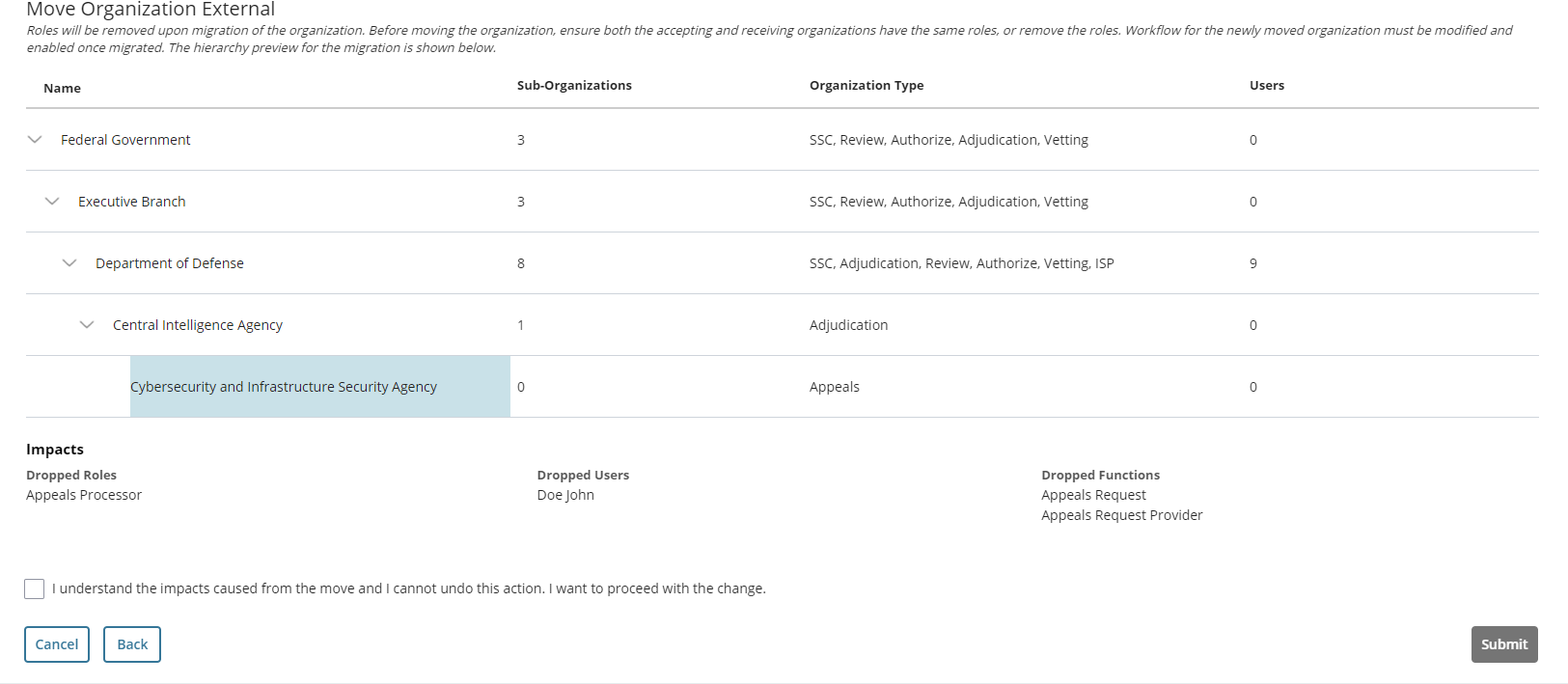


Figure 7: Organization Hierarchy Preview

1. 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.

1. 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.

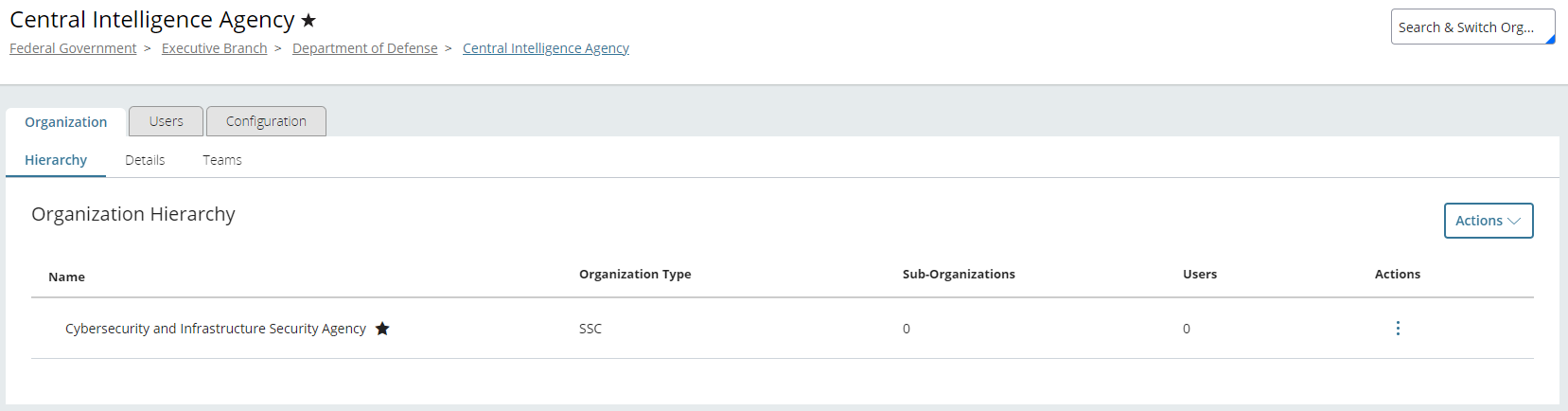


Figure 8: Organization Hierarchy Result