



Creating Organizations

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Application Section: Organization Management

User Roles: Organization Manager, Onboarding Manager

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

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Purpose: An **Organization** is a government entity and/or an investigation service provider that is used to initiate requests, receive requests, conduct investigations, and adjudicate cases. An **Organization Manager** can view, edit, add new organizations, and configure organizations under the **Org Management** tab.

General Information

Organization Context

The Organization tab contains Hierarchy, Details, and Teams sub tabs. The Users tab lists users added to your organization or hierarchy. The Configurations tab contains several organization configurations covered throughout this section. The Organization Context is your current organization showed in the header of the application.

Note: The Configuration tab visibility is dependent on the roles assigned to your persona.

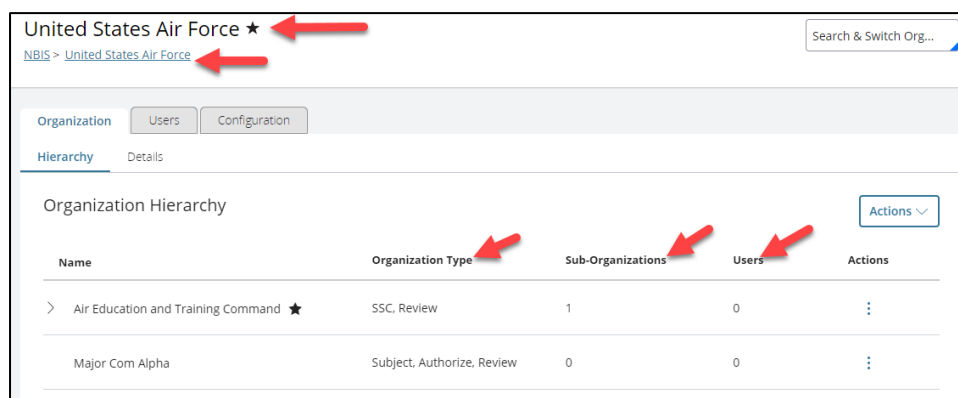


Figure 1: Organization Context with Identifiers





1. From the left navigation menu, select Organization Management.

Note: Org Managers are not able to manage the user and team tabs unless granted appropriate roles to manage them. These tabs will be in read-only mode. Teams do not apply to agency organizations.

2. The organization title and breadcrumb (link below organization title) will tell you which organization's attributes you are viewing. The breadcrumb is a link that will move to that organization's page if you navigate to a different organization level.
3. Select the Hierarchy tab to view the sub-orgs in the current organization's hierarchy.
4. Select the expand icon if available to view an expansion of the sub-org's hierarchy. Navigate to Other Organizations.

Switching Context

There are two ways to switch organization context:

- From the **Search & Switch Org** field, enter an organization's name, Org Path, or Org Code to find and select a different organization to view its details, users, and hierarchy.
- In the **Actions** column, select the **ellipsis** to display the action options for the sub-org. Select **Switch Organization Context** to view the sub-org's details, users, and hierarchy.

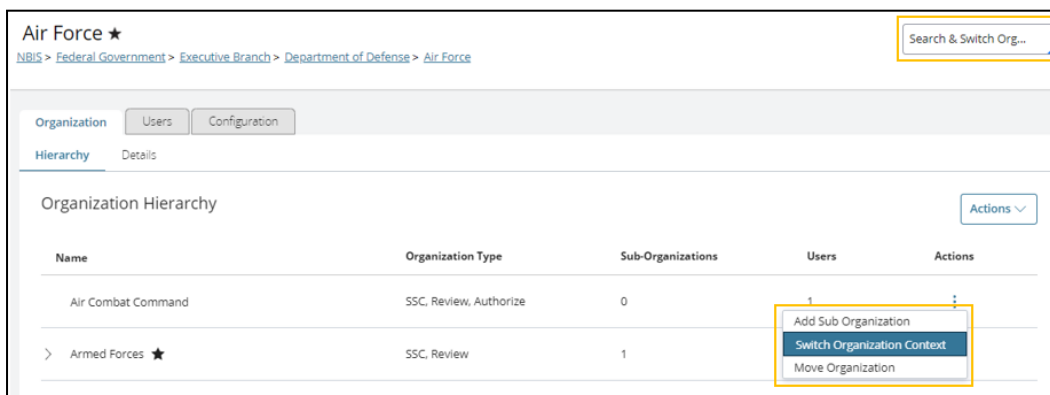


Figure 2: Org Management – Hierarchy

Importance of Hierarchy and Inheritance

The organization hierarchy is extremely important to the base functionality of NBIS. Every organization requires a name and a unique org abbreviation within its hierarchy.

The organization has fields that define the Org Types, Org Roles, and Org Functions. When defining a hierarchy, it is important to be aware of the impact these values are defining for all sub organizations.

There is a feature called inheritance built into the organization data. Org Types, Org Roles, and Org Functions are inherited by all suborganizations. When a role/type/function is removed, it will be unavailable for all sub organizations. This can be changed mid-hierarchy by the Onboarding Manager because they can add any missing roles/types/functions back into the organization.





Inheritance also supports certain configurations, such as Order Form Templates and Notifications. Sub-organizations can copy or inherit these configurations from their parent to reduce configuration time.

Managing Org Details

Create an Organization

1. From the left navigation menu, select Org Management. You should be displaying the Organization tab and Hierarchy sub-tab.

There are two ways to add a new organization:

- From the Actions drop-down, select Add Organization to create an organization at your current position in the hierarchy.
- Select the ellipses for the desired organization and select Add Sub Organization to create a sub organization at this location.

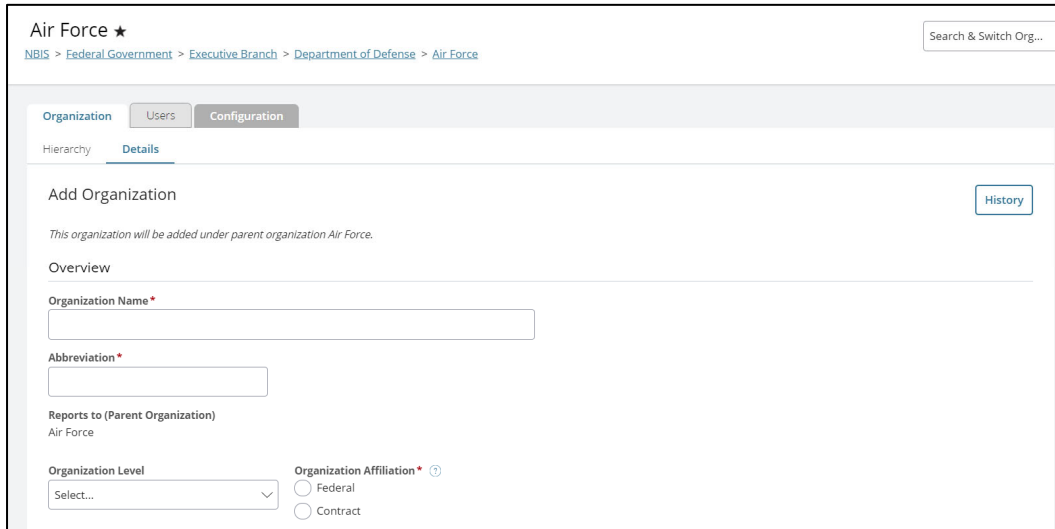


Figure 0-1: Add an Organization

Note: The steps for creating a sub organization are the same as creating an org in your current org context.

