Sometimes it will be helpful to plan your COs on paper before configuring them in the system.

**HOW TO USE THIS TOOL**: Use this worksheet to plan the configuration of your COs.

# A. The CO: Metadata

| 1 | Name | |
|---|------|---|
| 2 | Description | |
| 3 | Status | ☐ Active ☐ Suspended ☐ Template |

# B. CO Settings

| 4 | Features | Which items features should be enabled?<br>❏ Automatic Expiration *(default - enabled)*<br>❏ Org Identity Source Sync *(default - enabled)*<br>❏ Normailizations *(default - enabled)*<br>❏ NSF Demographics *(default - disabled)* |
|---|----------|---|
| 5 | Validity Timeframes | How much time do you want to allow for the following actions? (1440 min = 1 day)<br><br>Time before group membership is reprovisioned after a validity status change. *(default - 1440 min)*<br><br>Time before a confirmation link expires when confirming an email address in an invitation. *(default - 1440 min)* |
| 6 | Data fields | What fields are required for the address?<br>❏ Street *(default)*<br>❏ Street, City, State, ZIP/Postal Code<br>❏ Street, City, State, ZIP/Postal Code, Country<br>What name fields are REQUIRED?<br>❏ Given Name *(default)*<br>❏ Given Name, Family Name<br>What name fields are PERMITTED? (check all that apply - default is all)<br>❏ Honorific |

| | | |
|---|---|---|
| | | ❏  Given<br>❏  Middle<br>❏  Family<br>❏  Suffix |
| 7 | Use rules | Who are eligible to affect the roles that others assume for the CO?<br>❏  CO Admin<br>❏  CO Group member<br>❏  CO or COU Admin *(default)*<br>❏  Active CO Person<br>❏  No one - disable sponsors<br>How should Terms & Conditions be handled?<br>❏  Not enforced *(default)*<br>❏  Required at login |