Sponsor Manager Plugin

The Sponsor Manager plugin allows for Sponsors to manage the renewal and expiration of CO Person Roles for which they are the sponsor. (experimental)

⚠️ This plugin is considered Experimental.

- Installation
- Configuration
  - Expiration Look Ahead Window
  - Renewal Term
  - Renewal Availability Window
  - Customizing the Sponsored Role List
- Reviewing Sponsors
  - Notifications
- See Also

Installation

1. The Sponsor Manager Plugin is available with Registry v4.1.0 and later.
2. This is a non-core plugin, see Installing and Enabling Registry Plugins for more information.
3. The Sponsor Manager Plugin is *not* instantiated. Once installed, it will immediately be available to all COs.

Configuration

The Sponsor Manager Plugin may be configured on a per-CO basis via *CO* > *Configuration* > *Sponsor Manager Settings*.

Expiration Look Ahead Window

This setting controls the default view of Roles, see *Reviewing Sponsors* below for more information.

Renewal Term

If the Sponsor elects to renew a CO Person Role, the new valid through date will be the date of the renewal plus the number of days in the *Renewal Term*.

Renewal Availability Window

If set, Sponsors will only be able to renew CO Person Roles that are not less than this many days before expiration. For example, if today is June 1 and the current valid through date is June 30 and the *Renewal Availability Window* is set to 14 days, the *Renew* button will not be rendered.

Customizing the Sponsored Role List

The type of the Identifier and/or Email Address rendered in the Sponsored Role review list may be specified. If no type is set, the first Identifier or Email Address found will be rendered.

Several columns are optional, and can be enabled or disabled for rendering.

Reviewing Sponsors

The URL to view a given Sponsor's roles is available from the side menu of the Sponsor's CO Person Canvas, via the link *View Sponsored Roles*. This link may be shared with the Sponsor. The *View Sponsored Roles* link will be available for all CO People, regardless of whether or not they have any Sponsored Roles available. A CO Administrator may use this link to view any CO Person's Sponsored Roles.

The Default filter will present all Roles where

1. The current status is *Active*, *Grace Period*, or *Expired*
2. AND the valid through date of the CO Person Role is either in the past or within the *Expiration Look Ahead Window*.

The Sponsor may also set the filter to all sponsored Roles, all expired (sponsored) Roles, or all Roles with upcoming (within the Look Ahead Window) expirations.

Sponsors can take the following actions:

1. **Renew** a CO Person Role, possibly constrained by the *Renewal Availability Window*. If the Role does not currently have a valid through date, "renewal" is permitted at any time, which will effectively attach an expiration date to the Role based on the *Renewal Term*.
2. **Expire** a CO Person Role with immediate effect.
3. **Cancel** a pending enrollment for the CO Person Role.

Because Sponsors apply to *CO Person Roles* (not CO People), renewals and expirations also apply to CO Person Roles. As such, expiring a CO Person Role via this plugin might not expire the associated CO Person if there is another valid CO Person Role.

Notifications

It may be useful to send Notifications to Sponsors via Expiration Policies. These Notifications can include a link back to the Sponsor Manager Plugin via a URL like

```
https://registry.myvo.org/registry/sponsor_manager/sponsors/review/copersonid:(@SPONSOR_ID)
```

See Also

- Sponsors and Managers
- cm_sponsor_manager_settings
- CO-2422 Sponsor Manager Plugin Enhancements