



Account Manager Enhancements

Knowledge Management Center
October/November 2020

- Project overview
- Enhancement details
- Timeline
- Demonstration
- Q & A
- Future Enhancements
- Additional Information

- Account Manager Enhancements Project 2020
 - Evaluation of current state of tool
 - 5,431 active “company” accounts
 - Members, non-members, subaccounts
 - 43,968 user accounts
 - User feedback
 - Internal
 - External
 - User requests
 - Bright Ideas
 - Security concerns

- CAM Enhancements
 - Approve all/decline all for user access requests
 - Multi-select to add tool access to more than one user account
 - UI Search page modifications
 - Password resets for multiple accounts
 - Whitelist updates
 - SUMA user access termination
- Password reset criteria questions (AWARENESS ONLY)
 - 5 characters down to 4
- Pardot integration (AWARENESS ONLY)

- Training Sessions
 - October 30, 2020 (10:00 am to 11:30 am)
 - November 04, 2020 (1:30 pm to 3:00 pm)
 - November 10, 2020 (1:30 pm to 3:00 pm)
- Train Release
 - October 22, 2020
- Production Release
 - November 11, 2020



Live demo and Q&A

- Assimilate (SUMA) – December Release
 - Ability to combine multiple users into one user account
- User Migration – December Release
 - Ability to migrate users to main account
- User registration process updates – January Release
- System ID enhancements – January Release
- User to Member mapping – January Release
 - Additional field on user profile to designate whether a user is an employee, contractor, agent of/to the Member
- Password reset questions – January Release

- CAM Form B will be retired on 11/11/2020
 - Requests to add/revoke CAMs for all accounts related to Members must be submitted through the Maintenance feature in the Membership Management Community by an Authorized Rep or Maintenance Manager
 - Requests for the creation of a subaccount must be submitted through the Maintenance feature in the Membership Management Community by an Authorized Rep or Maintenance Manager
- New form for eDART CAM request to be published 11/11/2020
- New form for request to transfer accounts to be published 11/11/2020

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