



Account Manager Enhancements

Knowledge Management Center
January 2021

- 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
 - User registration process updates
 - Users can only create new user accounts where their email domain is whitelisted
 - System ID enhancements
 - System accounts will require that an owner is specified
 - User to Member mapping
 - Additional field on user profile to designate whether a user is an employee, contractor, agent of/to the Member
 - Password reset questions
 - All users will be prompted to update responses to new password reset questions when they reset their password

- Training Sessions
 - January 26, 2021 (10:00 am to 11:00 am)
 - January 28, 2021 (10:30 am to 11:30 am)
- Train Release
 - January 21, 2021
- Production Release
 - January 27, 2021



Live demo and Q&A

- 2021 Account Manager Project
 - User Recertification design, workflow, and implementation
 - Search page enhancements
 - Email notification updates

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