

Assigning Employees to an Account

All employees who access Project Management or Collaboration must belong to an account. When you assign an employee to an account, the account's billing information is automatically updated to reflect this addition. If there is no account, you will need to create one.

Sponsored users must also be assigned to an account. Note that if the company that sponsored the users decides to remove them from their billing account, these users will no longer belong to an account. To restore their access to Project Management or Collaboration, another company needs to assign them to an account. For more information, see ProjectTalk Easy Doc "Sponsoring Users".

To assign an employee to an account

1. On the **My ProjectTalk** page, under the **Administration** section and click **Administer** next to **Account Administration**.
2. The **Account Summary** page opens and displays a brief summary of all the accounts.
3. Click **Assign users to this account**.
4. The **Assign Employees** page opens and displays a list of employees that need to be assigned to a billing account.
5. Select the user you want to assign to a billing account.
6. To select more than one user, hold the CTRL or SHIFT key and click on the users, or select the **Select All** check box to select all the users.
7. Select from the **To Account** list the account to which you want to transfer the users.
8. Click **Transfer**.
9. The users are transferred to the selected account. If you add a user to a full account, ProjectTalk prompts you to choose another account.
10. Click **Done**.
11. Your account is updated.

* Alternate Option for Assigning Employees to an Account Individually.

1. On the My ProjectTalk page, go to the **Administration** section and click **Administer** next to **Employee Administration**.
2. The **Employee Summary** page opens and displays a summary of all the employees.
3. On the **Employee List** page, next to the user whose basic information you want edit, click **Edit**.
4. The **Edit Employee** page opens.
5. Edit the user's Account on this details page and then click **Done**.