

Creating a New Employee

Before employees can view or access your projects in ProjectTalk, you need to create their user profile and membership information. Instead of having each employee join ProjectTalk themselves, you can add employees in Employee Administration.

Important Notice: To create new users that are not employees of your company, or "create a sponsored user", you must create them in Project Management. For more information, see Projecttalk Easy Doc "Sponsoring Users".

To create a new user

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. Click on **Create New Employee** and enter the user's first name, last name and email address in the fields provided.
4. ProjectTalk automatically enters the company's name.
5. From the **Company Location** drop-down list, select the appropriate location or if the user's working location is the same as the company location, select the **Same as my company location** check box.
6. If the user's working location is not the same as the company location, clear the **Same as my company location** check box, and then enter the working location details in the fields provided.
7. If you have a referring company, click **Select a Referring Company** and look up the company.
8. Assign the user a Member ID and password. The user can change this password in the **My Profile** page.
9. Select the user's membership level and the billing account this user will be added to.
10. If you add a user to a full account, ProjectTalk prompts you to choose another account.
11. Select the user's payment plan. This payment plan will take effect after the default payment plan expires. A default plan is set to 'monthly'. If you do not select a payment plan, when the current payment plan expires, it will be automatically renewed with the current plan. Note that you cannot change the current payment plan and can only select the plan it will be renewed to.
12. If applicable, grant the user any **Administrative Permissions**.
13. Select the **Send Email to this Employee** checkbox to notify the employee of their Member ID and password.
14. Click **Done or Add Another**. ProjectTalk verifies that the information entered and sends the user an email notification with the user's Member ID and password.