

Creating a New Portfolio

Important: A fee is applied to your account for each portfolio you create. Due to initial setup costs, the fee for your first portfolio is greater than subsequent portfolios.

To request a portfolio

1. On the **My ProjectTalk** page, click **Administer** next to **Portfolio Administration**.
ProjectTalk displays the **Portfolio Summary** page.
2. Under **General Tasks**, click **Create Portfolio**.
The **Create Portfolio** page appears.
3. Enter the **Name of new portfolio**.
4. If your company uses a specific template when creating portfolios, in the **Template to be used** list, select the appropriate template.
For more information on using templates, see "Using Templates" below.
5. Select the **Billing Account** to which you want the portfolio creation fee charged.

If your company does not yet have a billing account, you must create a billing account before creating a portfolio. See Projecttalk Easy Doc "Create a billing account".
6. Enter the **Administrator's Password** and then confirm the password in the **Confirm Password** box.

To secure your project, this password is used as the Admin user's password in Project Management.
7. Enter any **Special Instructions**.
Special instructions are read by ProjectTalk Support Services.
8. Click **Next**.
The **Confirmation - Create Portfolio** page appears.
9. To confirm that you want to create this portfolio, click **Submit**.

You will receive an email from the ProjectTalk administrator once your portfolio is ready. Once your portfolio is ready, you can create projects.

Using Templates

A template determines the standard and structure of a portfolio or project. Use either an archive file (PMB) or a custom template (DTP) as your template.

In order to use your template for new portfolios, you must send it to ProjectTalk Operations. Send an email to ptadmin@projecttalk.com with the template, stating that you wish to use the template for a particular portfolio. You may include any special instructions and request that all future portfolios use this template.