Thank you for joining ISI as a member. As the administrator for your organization’s membership account, you can access different features that allow you to manage your staff, ENV SPs, and projects all in one place! This tutorial outlines how to set up your organizational account, manage your account membership, and purchase and allocate credits.

Login to your ISI account. In the top right-hand corner of your page, you are able to toggle between different user types depending on your account permissions. Select "Use Envision as Admin".

### Updating Organizational Account Information

From your Admin User Dashboard, you can access and update your organization’s account information by selecting “My Organization”.

Complete the “Account Info” form with the required information (as designated with a red asterisk). For improved recognition, you may upload a company logo.

If you so choose, you may include your email domain. By populating this field, when a user requests affiliation with your organization, their request will be automatically approved if their email address domain matches the domain you have listed. This is not required; if you do not list a domain, all affiliation requests will come directly to you as the account admin. Membership is detailed further in this tutorial.

When you have completed updating your account information, click the blue button labeled “Save”.

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**Web Tutorial**

**ADMIN FEATURES**

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Managing Account Membership

From the navy-blue menu at the top of the page, select “Members”. This will bring you to your main membership page. The diagram below highlights a few of the key features of this page.

- **The top bar provides an overview of your account membership**

- **Search for an individual member or filter your membership list.**

- **Sort your table by clicking on the column title by which you wish to sort.**

- **Select the number of entries you would like visible.**

- **Click “…” for access to more actions.**

- **Clicking “ENV SP Report” exports a .csv file with the status of all of your credential holders.**

- **“Export CSV” provides the visible table in a downloadable .csv file format.**
You may add members to your account by selecting the blue button labeled “Add Member”.

Search for the employee that you would like to add by email. The individual you are adding to your ISI organizational membership account must have already created an individual ISI account and must not be affiliated with another membership account. Be sure to search for the individual using the email used to create their individual account.

When an individual creates an ISI account, they have the option to connect to their employer’s membership account. You will be notified via email of any new requests.

Additionally, the affiliation request will appear in your “Pending Requests” table. If you have set an auto-accept domain name in “My Organization” from your Admin user Dashboard, any individuals using an email with the listed domain will be auto-approved and will not show up in this list. To approve or decline a pending request for affiliation, select the ellipses in the right-most column of the table. Remember that your organizational membership accounts are intended for employees of your organization only. Please do not accept requests from individuals who are not on your staff.
Purchasing and Allocating Credits

As the account Admin, you have the ability to purchase credits in bulk. Credits may be purchased for use by your individual account members to register for the ENV SP Training Course, renew their ENV SP credential or purchase additional continuing education courses.

All credits will appear in your Credits table. Be sure you are “Using Envision as Admin”, navigate to Members in the top navy-blue menu, then Credits.

To purchase credits, select the blue button labeled “Purchase Credit”.

Select the type of credit you would like to purchase, then populate the rest of the form with the quantity or amount, then select the blue button labeled “Purchase” to process your payment via credit card.

Note that payments may also be processed with a check; please contact ISI at info@sustainableinfrastructure.org to request an invoice for a bulk purchase of credits.
All credits will appear in your Credits table. Credits that are available to be assigned will have a blank field in the “Assigned” column. To sort this column and bring the unassigned credits to the top, click the column title.

To assign a credit, select the ellipses in the right-most column of an unassigned credit to bring up a menu of actions. Select “Assign”.

Select the individual’s email from the list of emails in the list. Note that only individuals who are affiliated members of your organizational account will appear on this list. Further, the email listed is identical to the email the individual used to establish their individual account and affiliate it with your membership account.

Navigating Account Members’ Dashboards
To help you troubleshoot, ISI account holders affiliated with your organizational membership account will be able to access the following information on their individual account Dashboard.

Click the question mark in either credit box for more information on the available credit.

Your organization name will appear here with a green “member” icon when correctly affiliated.

You are listed here along with other member account Admins.