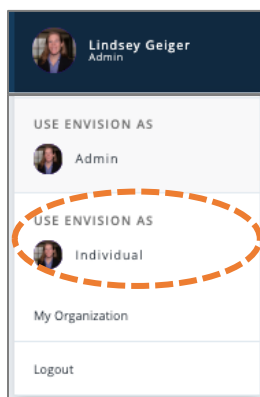


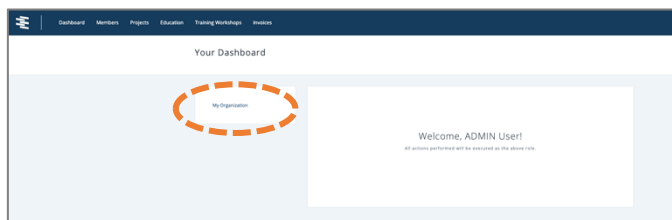
ADMIN FEATURES

Web Tutorial

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.

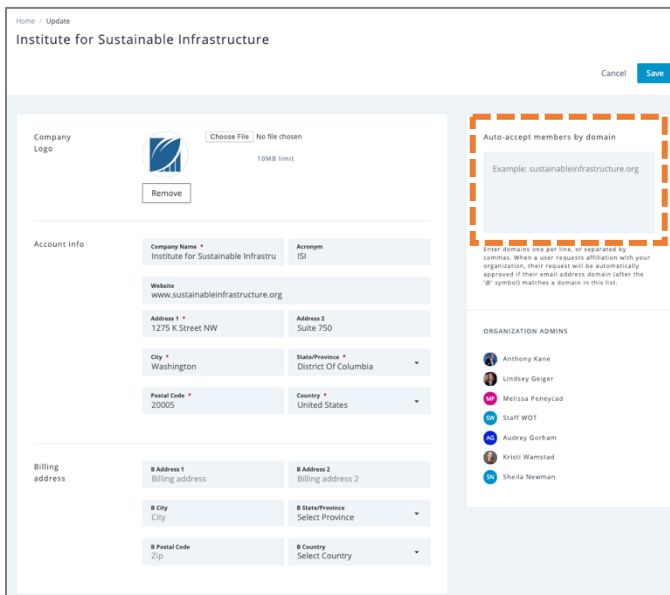


Login to your ISI account. In the top right-hand corner of your page, you are able to toggle between different user types depending on your account permissions. Select "Use Envision as Admin".



Updating Organizational Account Information

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



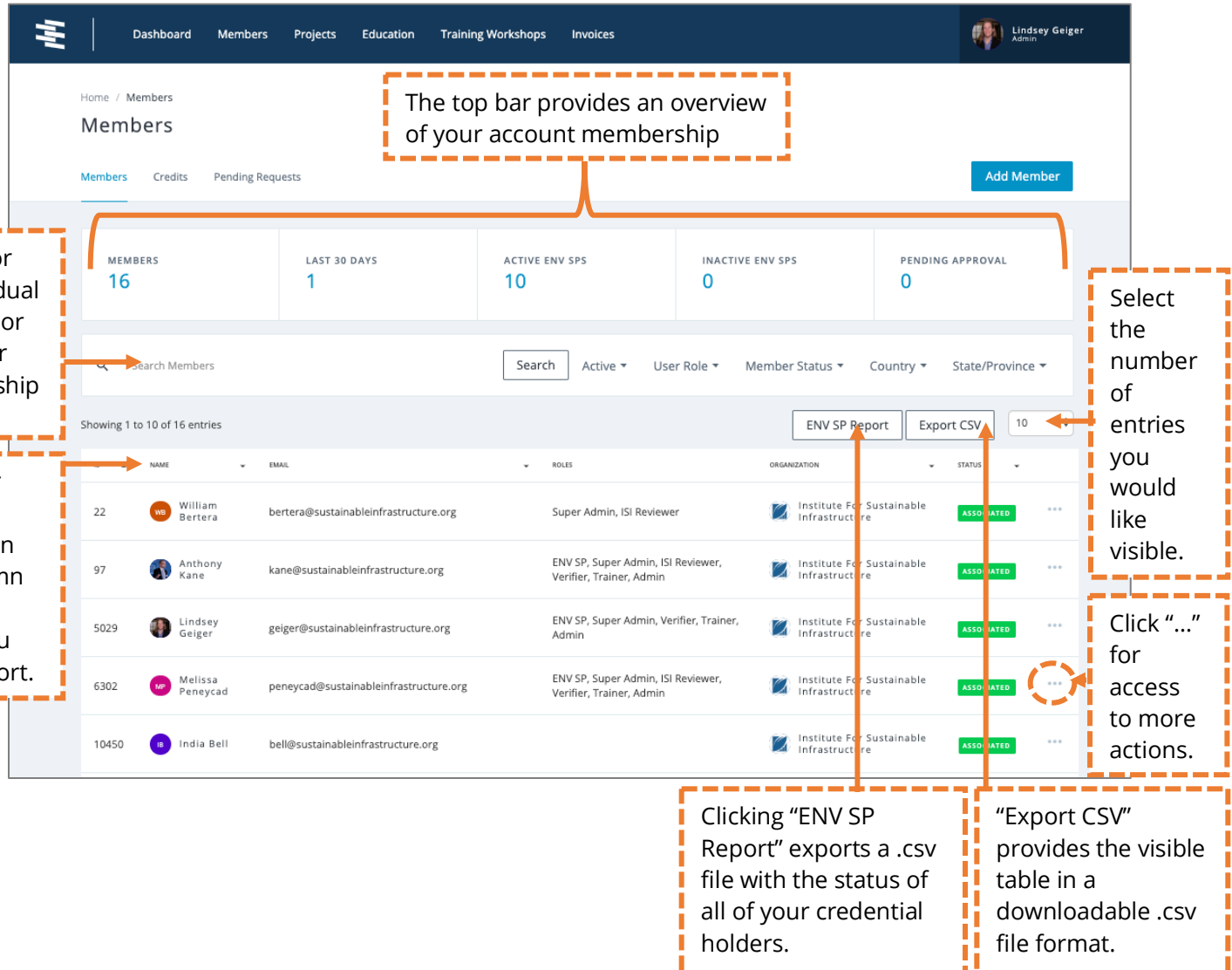
Complete the "Account Info" form with the required information (as designated with a red asterisk). For improved recognition, you may upload a company logo.

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".

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.

Members

Dashboard Members Projects Education Training Workshops Invoices











Home / Members

Members Credits Pending Requests

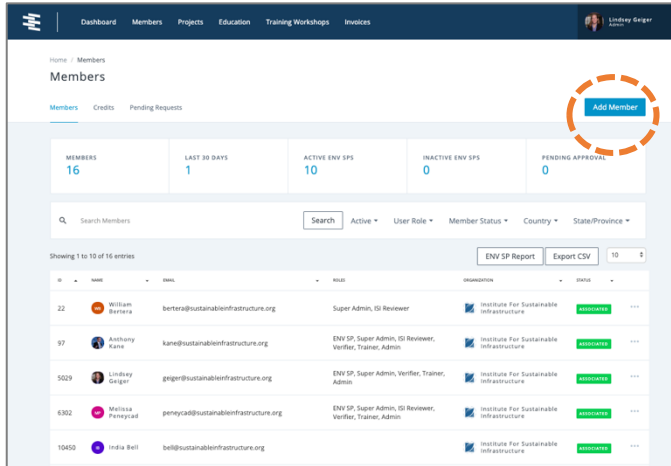
MEMBERS 16 LAST 30 DAYS 1 ACTIVE ENV SPS 10 INACTIVE ENV SPS 0 PENDING APPROVAL 0

Search Members Search Active User Role Member Status Country State/Province

Showing 1 to 10 of 16 entries

	NAME	EMAIL	ROLES	ORGANIZATION	STATUS	
22	 William Bertera	bertera@sustainableinfrastructure.org	Super Admin, ISI Reviewer	 Institute For Sustainable Infrastructure	ASSOCIATED	...
97	 Anthony Kane	kane@sustainableinfrastructure.org	ENV SP, Super Admin, ISI Reviewer, Verifier, Trainer, Admin	 Institute For Sustainable Infrastructure	ASSOCIATED	...
5029	 Lindsey Geiger	geiger@sustainableinfrastructure.org	ENV SP, Super Admin, Verifier, Trainer, Admin	 Institute For Sustainable Infrastructure	ASSOCIATED	...
6302	 Melissa Peneycad	peneycad@sustainableinfrastructure.org	ENV SP, Super Admin, ISI Reviewer, Verifier, Trainer, Admin	 Institute For Sustainable Infrastructure	ASSOCIATED	...
10450	 India Bell	bell@sustainableinfrastructure.org		 Institute For Sustainable Infrastructure	ASSOCIATED	...

ENV SP Report Export CSV 10



Home / Members

Members Credits Pending Requests

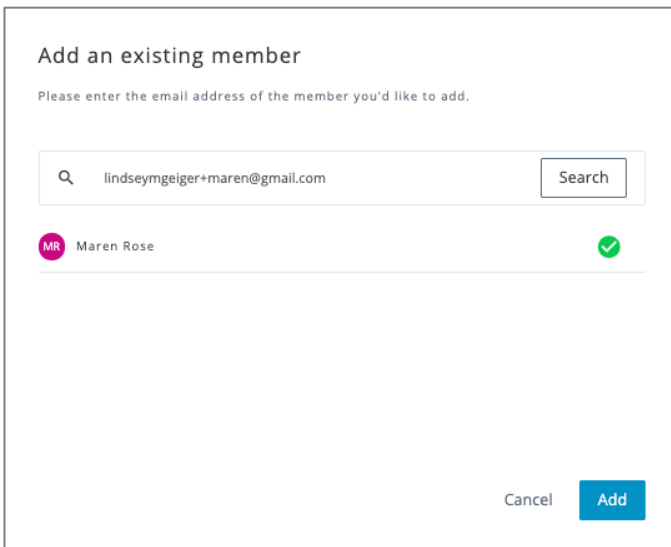
MEMBERS 16 LAST 30 DAYS 1 ACTIVE ENV SPs 10 INACTIVE ENV SPs 0 PENDING APPROVAL 0

Search Members Search Active User Role Member Status Country State/Province

Showing 1 to 10 of 16 entries

ID	NAME	EMAIL	ROLE	ORGANIZATION	STATUS
22	William Bowers	bentwa@sustainableinfrastructure.org	Super Admin, GI Reviewer	Institute For Sustainable Infrastructure	APPROVED
97	Anthony Kane	kane@sustainableinfrastructure.org	ENV SP, Super Admin, GI Reviewer, Verifier, Trainer, Admin	Institute For Sustainable Infrastructure	APPROVED
5029	Lindsey Geiger	geiger@sustainableinfrastructure.org	ENV SP, Super Admin, Verifier, Trainer, Admin	Institute For Sustainable Infrastructure	APPROVED
6302	Melissa Pacheco	penycad@sustainableinfrastructure.org	ENV SP, Super Admin, GI Reviewer, Verifier, Trainer, Admin	Institute For Sustainable Infrastructure	APPROVED
10400	India Bell	bell@sustainableinfrastructure.org		Institute For Sustainable Infrastructure	APPROVED

You may add members to your account by selecting the blue button labeled “Add Member”.



Add an existing member

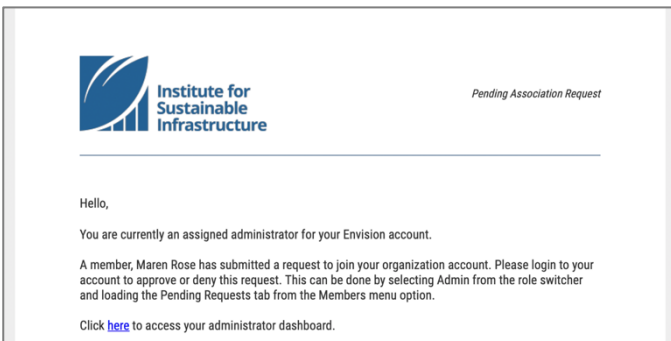
Please enter the email address of the member you'd like to add.

Search lindseymgeiger+maren@gmail.com Search

MR Maren Rose

Cancel Add

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.



Institute for Sustainable Infrastructure

Pending Association Request

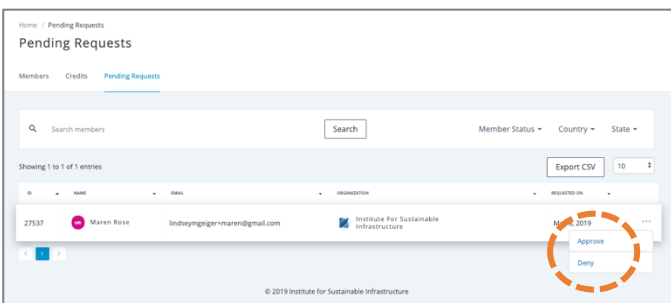
Hello,

You are currently an assigned administrator for your Envision account.

A member, Maren Rose has submitted a request to join your organization account. Please login to your account to approve or deny this request. This can be done by selecting Admin from the role switcher and loading the Pending Requests tab from the Members menu option.

Click [here](#) to access your administrator dashboard.

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.



Home / Pending Requests

Pending Requests

Members Credits Pending Requests

Search members Search Member Status Country State

Showing 1 to 1 of 1 entries

ID	NAME	EMAIL	ORGANIZATION	REQUESTED ON
27537	Maren Rose	lindseymgeiger+maren@gmail.com	Institute For Sustainable Infrastructure	10/2/2019

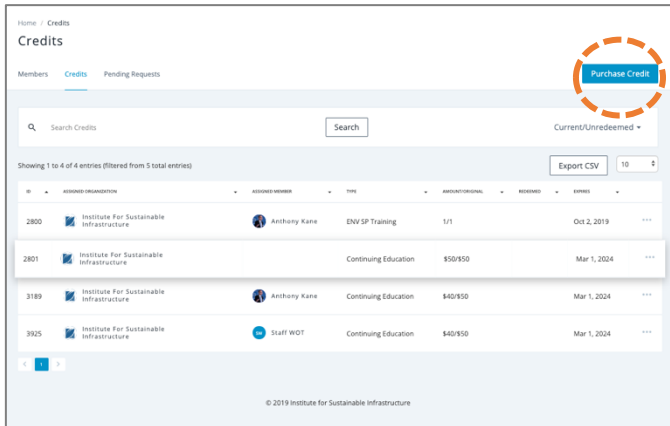
Approve Deny

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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.



Home / Credits
Credits

Members Credits Pending Requests

Search Credits Search Current/Unredeemed

Showing 1 to 4 of 4 entries (filtered from 5 total entries) Export CSV 10

ID	ASSIGNED ORGANIZATION	ASSIGNED MEMBER	TYPE	AMOUNT/CREDITS	REDEEMED	EXPIRES
2800	Institute For Sustainable Infrastructure	Anthony Kane	ENV SP Training	1/1		Oct 2, 2019
2801	Institute For Sustainable Infrastructure		Continuing Education	\$50/\$50		Mar 1, 2024
3189	Institute For Sustainable Infrastructure	Anthony Kane	Continuing Education	\$40/\$50		Mar 1, 2024
3925	Institute For Sustainable Infrastructure	Staff WGT	Continuing Education	\$40/\$50		Mar 1, 2024

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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".

Purchase Credit
Purchase credits for your organization.

Credit Type *
Credential Maintenance Renewal

Amount *
\$50

Number of Credits *

Cancel Purchase \$0

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.

Purchase Credit
Purchase credits for your organization.

Continuing Education Courses
✓ Credential Maintenance Renewal
ENV SP Training Course

Amount *
\$50

Number of Credits *

Cancel Purchase \$0

Showing 1 to 4 of 4 entries (filtered from 5 total entries)

ID	ASSIGNED ORGANIZATION	MEMBER	TITLE	AMOUNT/ORIGINAL	REMARKS	STATUS
2800	Institute For Sustainable Infrastructure	Anthony Kane	ENV SP Training	1/1		Oct 2, 2019
2801	Institute For Sustainable Infrastructure		Continuing Education	\$50/\$50		Mar 1, 2024
3189	Institute For Sustainable Infrastructure	Anthony Kane	Continuing Education	\$40/\$50		
3925	Institute For Sustainable Infrastructure	Staff WOT	Continuing Education	\$40/\$50		Mar 1, 2024

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.

Manage Credit

Assign Credit To
info@sustainableinfrastructure.org

Cancel Save

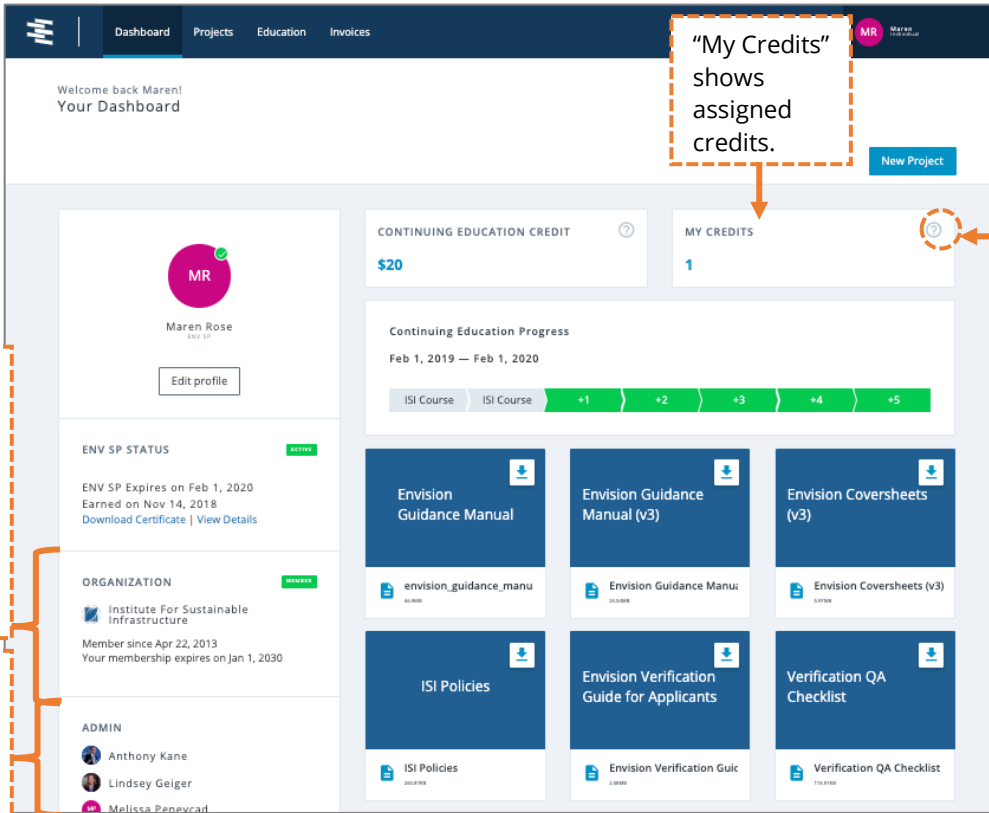
To assign a credit, select the ellipses in the right-most column of an unassigned credit to bring up a menu of actions. Select “Assign”.

bertera@sustainableinfrastructure.org
kane@sustainableinfrastructure.org
bell@sustainableinfrastructure.org
test@test.com
✓ info@sustainableinfrastructure.org
test2@test.com
info-admin@sustainableinfrastructure.org

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.



Dashboard Projects Education Invoices

Welcome back Maren!
Your Dashboard

MR
Maren Rose
ENV SP

Edit profile

ENV SP STATUS ACTIVE

ENV SP Expires on Feb 1, 2020
Earned on Nov 14, 2018
Download Certificate | View Details

ORGANIZATION MEMBER

Institute For Sustainable Infrastructure
Member since Apr 22, 2013
Your membership expires on Jan 1, 2030

ADMIN

- Anthony Kane
- Lindsey Geiger
- Melissa Penewad

CONTINUING EDUCATION CREDIT ?

\$20

MY CREDITS ?

1

Continuing Education Progress
Feb 1, 2019 — Feb 1, 2020

ISI Course ISI Course +1 +2 +3 +4 +5

Envision Guidance Manual

envision_guidance_manu

Envision Guidance Manual (v3)

Envision Guidance Manu

Envision Coversheets (v3)

Envision Coversheets (v3)

ISI Policies

ISI Policies

Envision Verification Guide for Applicants

Envision Verification Guic

Verification QA Checklist

Verification QA Checklist

“My Credits” shows assigned credits.

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.