CREATE A PROJECT

Online Tutorial

You are invited to use the online scoresheet for project self-assessments. This file lists the steps in creating a project online and managing project team members.
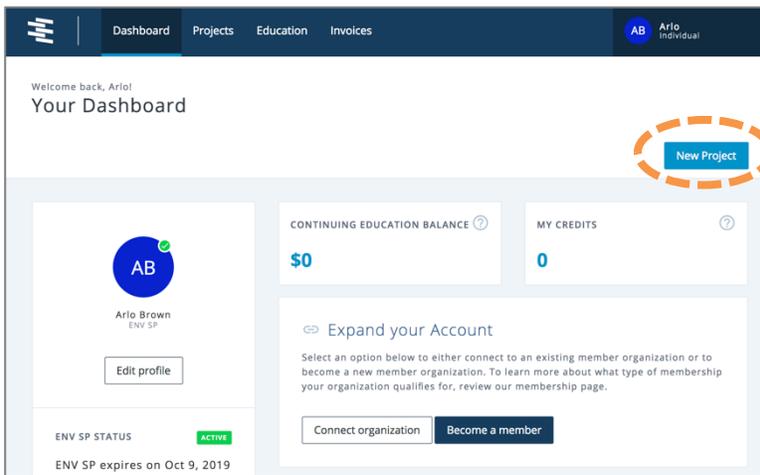
Login to your account.

From your Dashboard, click the blue button labeled "New Project"
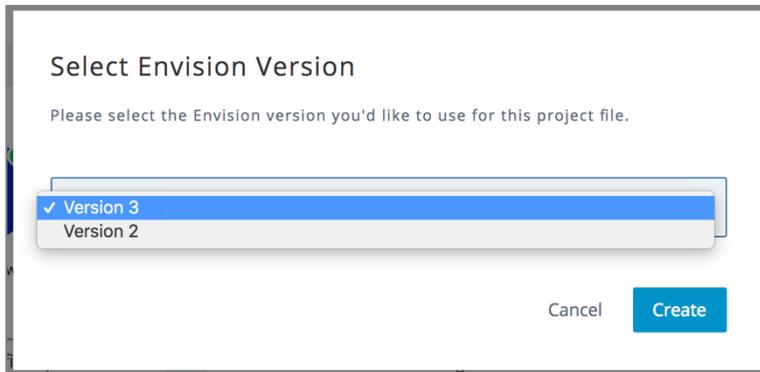
Select which version of Envision you would like to use (v2 or v3). Once you make this selection and create a project, you cannot change the Envision Version.
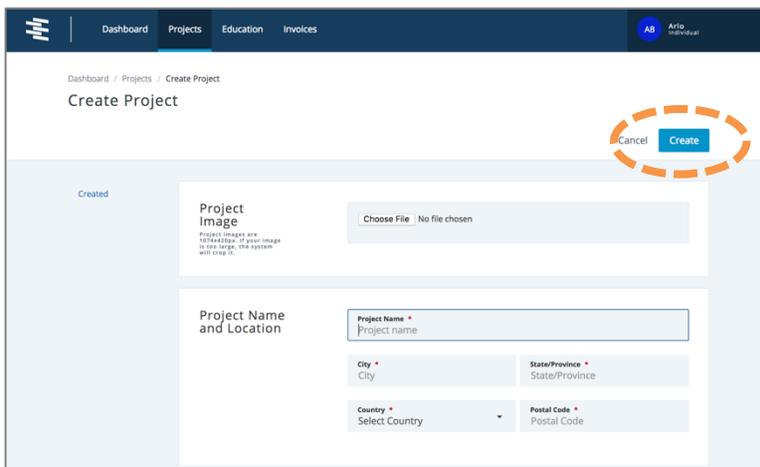
Complete the required project information. All fields marked with a red Asterix are required to create a project. Additional project information can be populated on the project details page as described in this document.

When you have input the required information click the blue button labeled "Create".
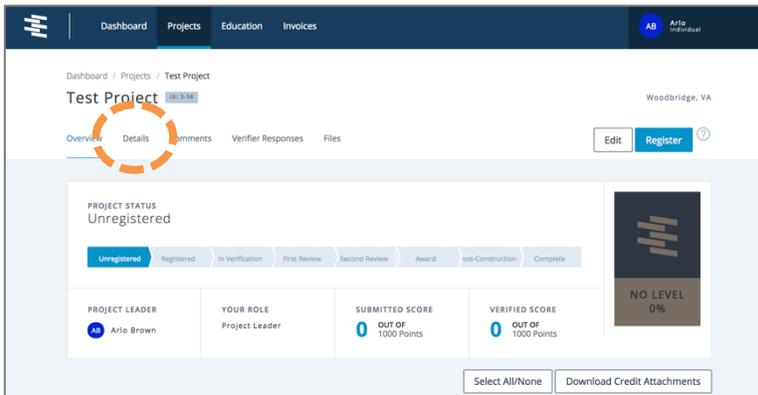
Your project landing page shows the project status along with an overview of the project including all credit assessments (not shown).

To add details to your project, navigate to the "Details" tab.
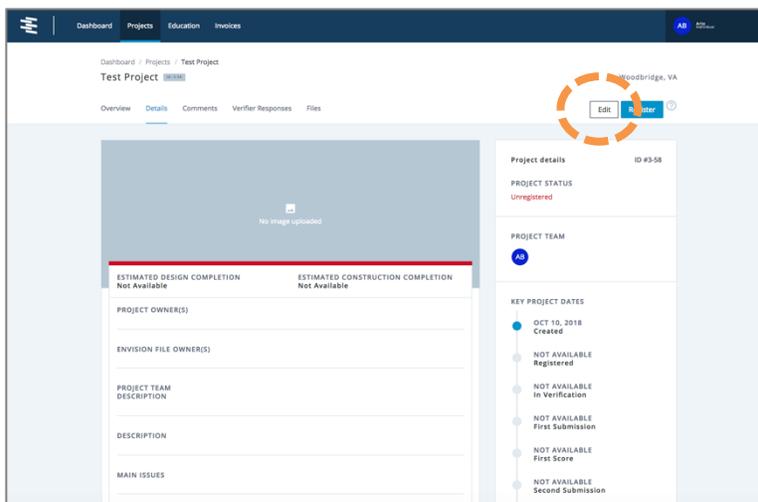
Click the white button labeled "Edit"
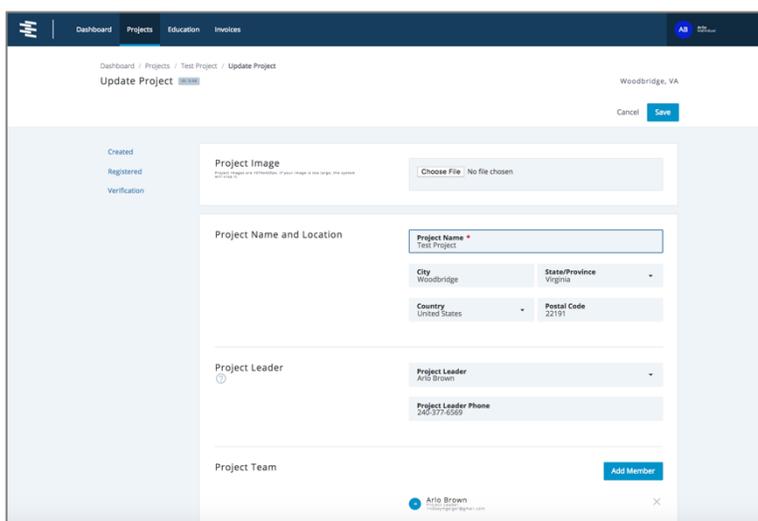
Information can be added to this page to give a broader picture of your project. On this page you may also add information such as: project address, Envision project file owners, project owners, lead ENV SP, project types, key dates, verification pathway, project costs and fees, project description, project team, project delivery method, site map, and reasons for pursuing verification. All information is optional unless otherwise noted with a red Asterix.

Additional information regarding what should be included in each section can be found by hovering over the question marks.
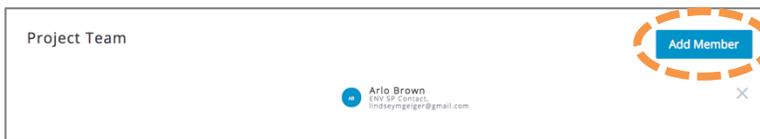
Add team members to project account by clicking the blue button labeled "Add Member".
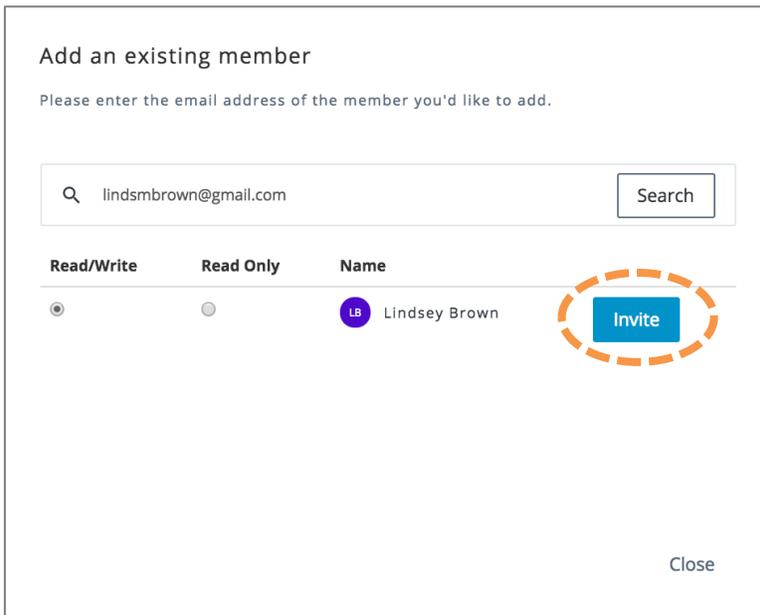
Type in the email address for the person you would like to add. You can invite anyone from any company to your project. This will generate an email to the new project team member. The new project team member must accept the invitation via email in order to be added to the project.

Any individuals who should be designated as either the "Project Leader" or the "Lead ENV SP" must first be added to the project team using this process.

Always be sure to save your changes! The blue button labeled "save" remains in the header of this page as you scroll.