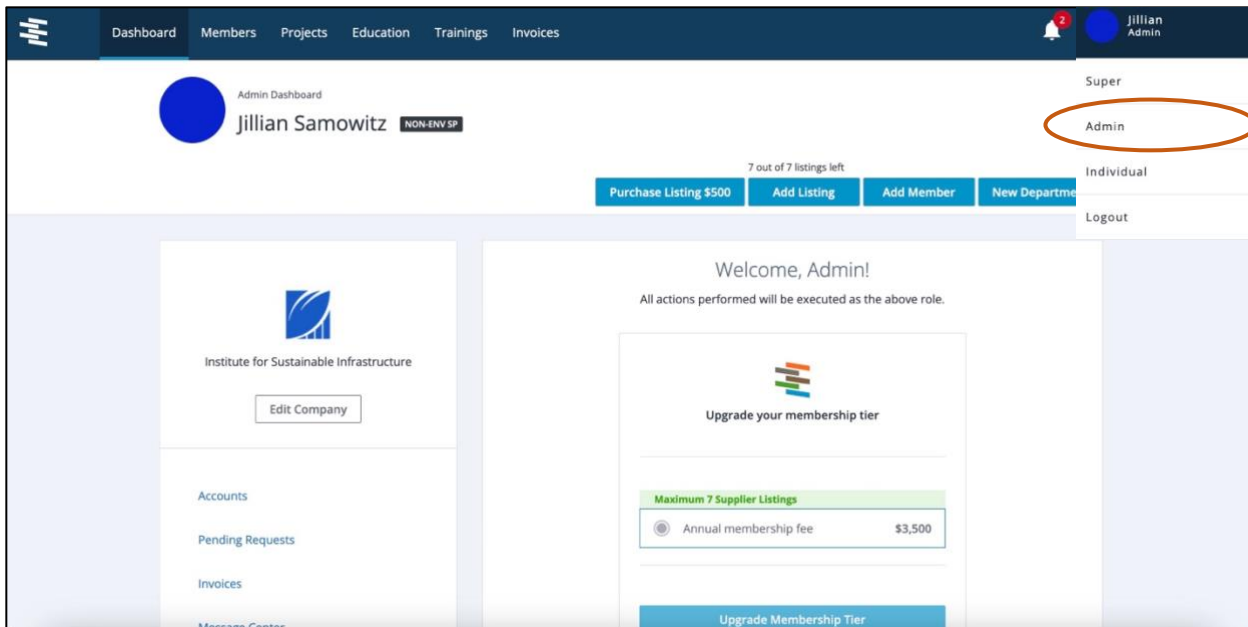


# ADMIN FEATURES

## Online 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.*




The screenshot displays the ISI Admin Dashboard. At the top, a dark blue navigation bar contains the following menu items: Dashboard, Members, Projects, Education, Trainings, and Invoices. On the right side of this bar, there is a notification bell icon with a red '2' badge, a profile picture of Jillian Admin, and the name 'Jillian Admin'. Below the navigation bar, the main content area is titled 'Admin Dashboard' and shows the user's name 'Jillian Samowitz' with a 'NON-ENV SP' status. A dropdown menu is open on the right side, listing user roles: Super, Admin (highlighted with an orange oval), Individual, and Logout. Below the menu, there are several action buttons: 'Purchase Listing \$500', 'Add Listing', 'Add Member', and 'New Department'. The main content area features a 'Welcome, Admin!' message and a section for 'Upgrade your membership tier'. This section includes a 'Maximum 7 Supplier Listings' indicator and a table with one row: 'Annual membership fee' for '\$3,500'. An 'Upgrade Membership Tier' button is located at the bottom of this section. On the left side of the dashboard, there is a sidebar with a logo and the text 'Institute for Sustainable Infrastructure', an 'Edit Company' button, and a list of menu items: Accounts, Pending Requests, Invoices, and Message Center.

To begin, 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 your name and then "Admin".

Organization

 **Select Organization Logo** 25MB limit

Organization Name \*  
Example Org

Organization Type \*  
Company

Organization Size \*  
< 50 employees: \$500/yr

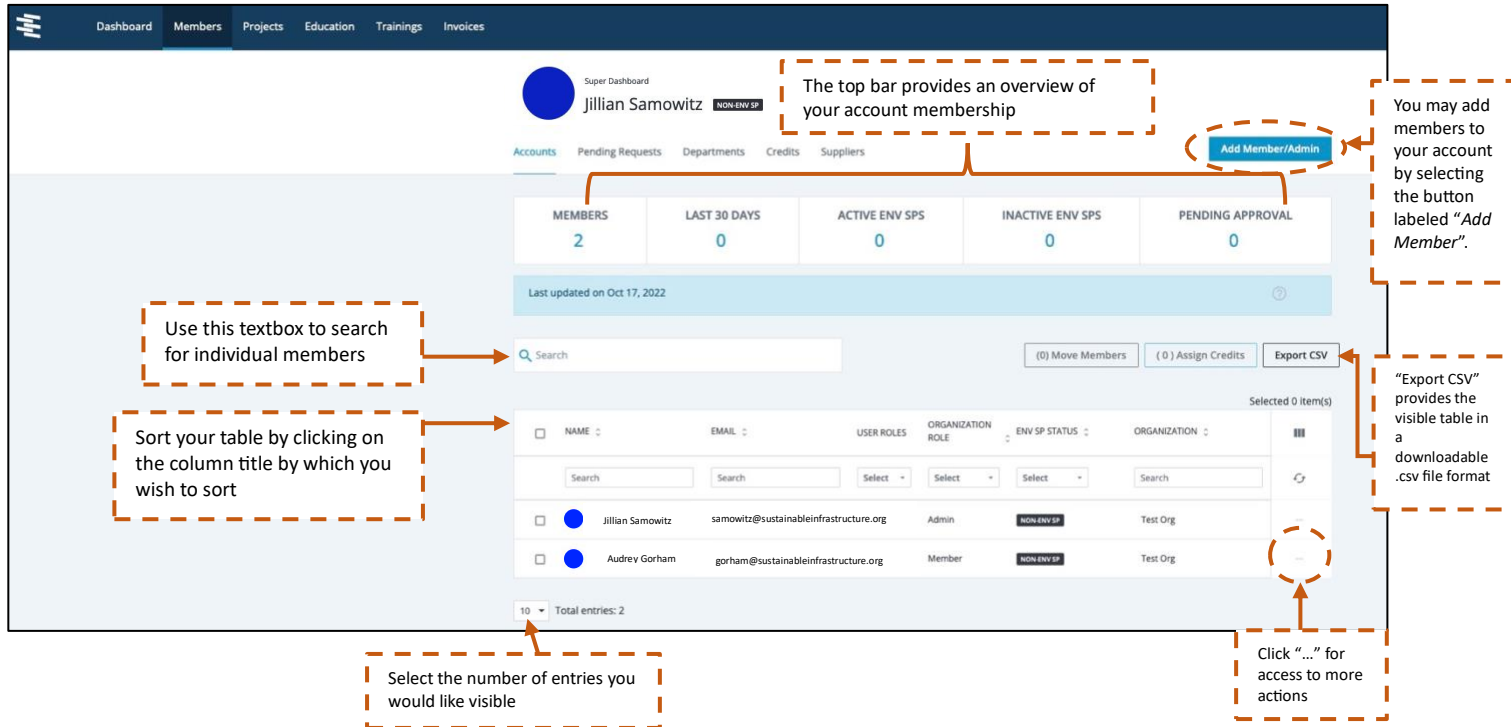
Acronym  
EXO

Website  
https://websitedomainhere.com

Exclude from ESA/EQC

Once you have completed this, you can select “Save” for the information to populate within our database.

## Managing Account Membership



The screenshot shows the 'Members' page in the Super Dashboard. The top navigation bar includes 'Dashboard', 'Members', 'Projects', 'Education', 'Trainings', and 'Invoices'. The user is logged in as Jillian Samowitz (NON-ENV SP). The main content area displays a summary of membership statistics and a table of members.

**Callout Boxes:**

- Top Bar:** The top bar provides an overview of your account membership.
- Add Member/Admin:** You may add members to your account by selecting the button labeled "Add Member".
- Search:** Use this textbox to search for individual members.
- Table Headers:** Sort your table by clicking on the column title by which you wish to sort.
- Export CSV:** "Export CSV" provides the visible table in a downloadable .csv file format.
- More Actions:** Click "... " for access to more actions.
- Page Footer:** Select the number of entries you would like visible.

MEMBERS	LAST 30 DAYS	ACTIVE ENV SPS	INACTIVE ENV SPS	PENDING APPROVAL
2	0	0	0	0

Last updated on Oct 17, 2022

Search



(0) Move Members (0) Assign Credits Export CSV

NAME	EMAIL	USER ROLES	ORGANIZATION ROLE	ENV SP STATUS	ORGANIZATION
Jillian Samowitz	samowitz@sustainableinfrastructure.org	Admin		NON-ENV SP	Test Org
Audrey Gorham	gorham@sustainableinfrastructure.org	Member		NON-ENV SP	Test Org

10 Total entries: 2

**Add an existing member**

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


Jillian Samowitz


Search for the employee that you would like to add by email.

The individual you are adding to your organizational membership account must have already created an individual ISI account and must not be affiliated with another membership account.



Home / Pending Requests

### Pending Requests

Members Credits Pending Requests

Member Status ▾
Country ▾
State ▾

Showing 1 to 1 of 1 entries Export CSV 10 ▾

ID	NAME	EMAIL	ORGANIZATION	REQUESTED ON	
27537	 Jillian Samowitz	samowitz@sustainableinfrastructure.org	 Institute For Sustainable Infrastructure	August 18, 2023	... Approve Deny

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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 from your Admin user Dashboard, any individuals using an email address with the listed domain will be auto-approved and will not show up on this list.

To approve or decline a pending request for affiliation, select the ellipses in the right-most column of the table. As a reminder, 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.

## Paying Your Membership Fee

Welcome, Admin!

All actions performed will be executed as the above role.



**Upgrade your membership tier**

---

**Maximum 5 Supplier Listings**

<input checked="" type="radio"/> Annual membership fee	\$2,500
--	---------

**Maximum 7 Supplier Listings**

<input type="radio"/> Annual membership fee	\$3,500
---	---------

---

**Upgrade Membership Tier**

You will notice on your Dashboard that you can update to become an Envision Supplier or change the tier of your membership at any time.

You can also make payments securely through your Dashboard.

**Maximum 1 Supplier Listings**

<input type="radio"/> < 50 employees	\$500
--------------------------------------	-------

**Maximum 3 Supplier Listings**

<input type="radio"/> 50-99 employees	\$1,500
---------------------------------------	---------

**Maximum 5 Supplier Listings**

<input checked="" type="radio"/> 100-500 employees	\$2,500
--	---------

**Maximum 7 Supplier Listings**

<input type="radio"/> > 500 employees	\$3,500
---------------------------------------	---------

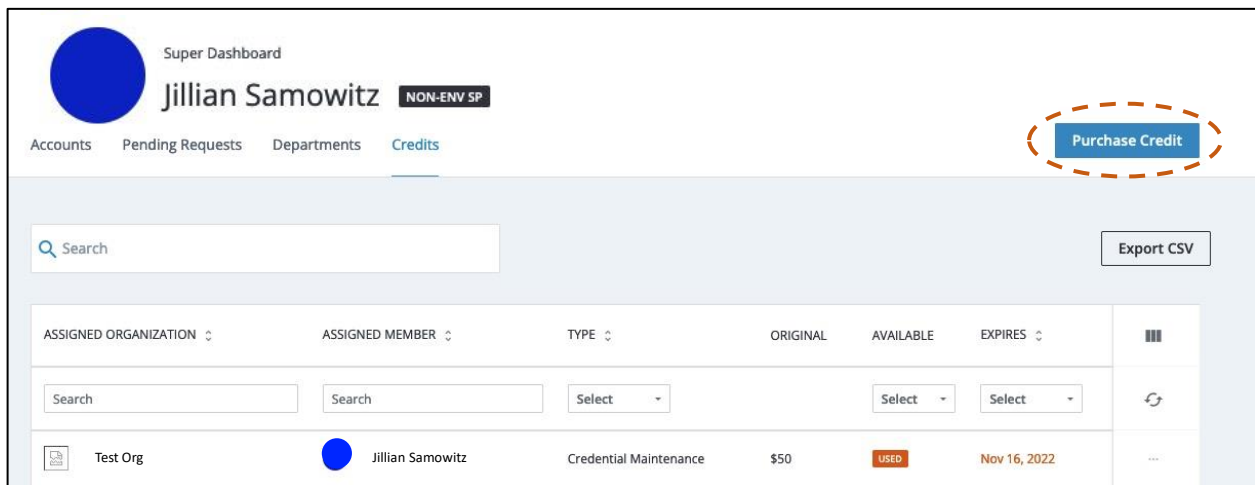
---

**Create Invoice**

**Pay With Card \$2,500**

## 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.



Super Dashboard  
Jillian Samowitz NON-ENV SP

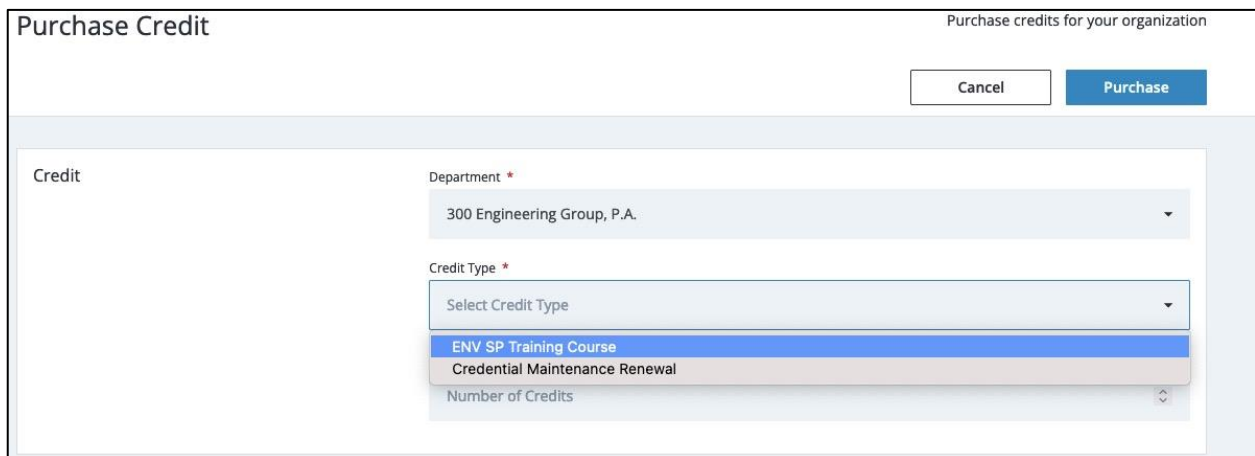
Accounts Pending Requests Departments Credits

Search Export CSV

ASSIGNED ORGANIZATION	ASSIGNED MEMBER	TYPE	ORIGINAL	AVAILABLE	EXPIRES	
Test Org	Jillian Samowitz	Credential Maintenance	\$50	USED	Nov 16, 2022	...

All credits will appear in your Credits table.

Be sure you are using the platform as an “Admin”. You can access this section by navigating to the Members tab in the top navy-blue menu and then “Credits”.



Purchase Credit Purchase credits for your organization

Cancel Purchase

Credit

Department \*  
300 Engineering Group, P.A.

Credit Type \*  
Select Credit Type  
ENV SP Training Course  
Credential Maintenance Renewal  
Number of Credits

Select the type of credit you would like to purchase. The amount will populate based on your selection. When you are ready, you may select the blue button labeled “Purchase” to process your payment via credit card.

*Note: Payments may also be processed with a check; please contact ISI at [info@sustainableinfrastructure.org](mailto:info@sustainableinfrastructure.org) to request an invoice for a bulk purchase of credits.*



## Web Tutorial | 2023

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

ID	ASSIGNED ORGANIZATION	ASSIGNED MEMBER	TYPE	AMOUNT/ORIGINAL	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			***
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.

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".

Manage Credit

Assign Credit To  
info@sustainableinfrastructure.org

Cancel Save

Select the individual's email from the list of emails in the list.

*Note: Only individuals who are affiliated members of your organizational account will appear on this list. Further, the email listed is identical to the email used to establish their individual account and affiliate it with your membership account.*

And that's it! You have successfully allocated credits to another member of your team!