SOS-UK toolkit user guide
February 2023
About

This guide should take you through the key aspects of the toolkit and help you get the most from it.

We are constantly evaluating and developing the toolkit based on the feedback we receive from teams and organisations, so do feedback your thoughts throughout the year and we will consider them within future edits and developments.

If you have any further suggestions and ideas, please contact us on toolkit@sos-uk.org.

Please note that this guide is for our new toolkit platform released in 2023. If you are using a previous version of the toolkit, the previous user guide can be found here.
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Registering and logging in

You will be provided with a link to your organisation’s bespoke toolkit.

When you first arrive at your toolkit, register yourself if you are new to the programme, by clicking on the register button underneath the log-in box.

Once you have registered, use the log-in box to log-in each time.
Registering and logging in

You can fill out your personal details on the registration page.

Make sure your email address is accurate, as you will need to verify it in the next stage. We recommend using a work/study email address rather than a personal email. For some programmes, you may need to enter an email address with a specific domain (such as @ac.uk), which will be outlined on the registration page.

Your password must be at least 10 characters and contain at least one special character and one number. We strongly suggest using a unique, secure password.
Registering and logging in: verifying your email

You will receive a verification email to the email address you registered with.

Click the ‘verify email address’ button to activate your account. If you do not receive an email, you can request another is sent to you on the toolkit login page.
Joining a team

Once you have verified your account, you can log in and will be invited to:

1. Answer any additional profile questions set by your organisation. Be sure to answer these as accurately as possible - this really helps us to monitor the reach of the programme.

2. Either add yourself to an existing team if your team already exists or create a brand-new team if your team is taking part for the first time. Make sure to double check the list to make sure your team doesn't already exist, before creating a new one.
Joining your toolkit

Head to ‘Toolkit’ on the left-hand menu to join the current toolkit.
Amending your user profile

If you need to change any of your profile details after registration, you can access your profile by clicking your avatar in the top right of the screen.

Here you can change your personal details, password, enable two factor authentication, log out of other browser sessions, and delete your account. You can also set a profile photo.
Amending your team’s profile

Access your team’s profile in the top right, by clicking ‘team settings’.

On the team profile you can:

- Rename your team
- Invite new team members to join your team using their email address
- View team members and remove any inactive team members

If your team is no longer active, you will need to contact your SOS-UK project manager, or toolkit@sos-uk.org so we can de-activate it.
How your programme works

You can find information on how your programme works on the ‘dashboard’ page. There may also be an FAQs or help page available, with information on which actions you need to complete to get your award.

This is also where other relevant information will be, e.g., Green Impact dates to remember and commonly asked questions.
Your toolkit

Each toolkit comprises of many different actions to explore and take.

Not all actions will necessarily be relevant to your team, and you probably won’t be expected to complete all of the possible actions.

Check the homepage or help page to read more about what actions you need to complete to get your award, as this varies from programme to programme.
Your toolkit

Each toolkit is different and organised in a different way, but there will always be some kind of filtering of actions available - by 'Area', 'Theme', 'Award Level' or 'SDG'.

Your programme may use some or all of these filters, but as a guideline:

• 'Area' will split actions by relevance for specialised teams, so you may expect to see things like 'General', 'Office', 'Catering';
• 'Theme' will categorise actions by topics such as 'Energy', 'Water', 'Communication';
• 'SDG' will show actions that support the selected UN Sustainable Development Goal;
• 'Award Level' will show actions for specific award levels such as 'Bronze', 'Silver', 'Gold'.

Additionally, there is an option to star actions and filter by that. You can also sort actions.
Completing actions

Each action comprises 4 sections:

1. Criteria - this should be a clear outline of what action you can take in your team to make an impact but is open for you to complete as you wish within your team.

2. Further Information - this will let you know why the action is important, where you access further resources and may give guidance on the type of activity you can take to complete it.

3. How you will be audited - simple outline of what evidence you need to collect.

4. Comments & evidence - your space to record progress to date, coordinate with your team members and upload final pieces of evidence.
Completing actions

When you have completed an action, simply click on the ‘Done’ button to the right of the criteria. You can also mark an action as ‘In Progress’ if you have started, but not completed it.

If you can’t complete any action for reasons out of your control, you can select N/A (Not Applicable), although not all actions will have a N/A option. Auditors may request evidence of why this is not applicable to your team.

Changes automatically save.
Uploading evidence and leaving comments

You should upload evidence to demonstrate how you have completed actions, which will support your audit process.

Under the 'Comments & evidence' section, click on the ‘Add’ button and attach your file. It will accept most file types (Excel, PowerPoint, Word, PDF, JPEG) up to a maximum size of 4MB. Please upload image files directly (do not paste them into Word unless there is a specific reason for you to do so).

You do not need to upload lots of evidence for each action - a simple screenshot or photo is usually sufficient but check the ‘how you will be audited’ section for guidance.
Uploading evidence and leaving comments

You should also leave comments in the final tab for each action. This provides information for your auditor on how you have approached the action.

You can delete your comments if they are no longer relevant.

Evidence uploaded for each action will be presented as a list of files which you can see in the tab. You will be able to download the files by clicking on the hyperlinks and delete them if you no longer want them to be included.
Starring and assigning actions

You can star actions for easy access - just click the star next to each action reference. These will then appear on your dashboard.

To assign an action to yourself or a team member, click the edit button at the bottom of the action. You will be able to select from all registered users in your team. Assigned actions will appear on each user’s personal dashboard.
Your dashboard

On your dashboard, you will be able to view your team’s progress towards your award. You will see the different available awards, and the criteria you need to meet each one. A green tick will appear next to awards for which you have fulfilled all the necessary criteria. The exact scoring will vary from programme to programme.

Don’t forget that your final award is subject to an audit after you have submitted your toolkit. Therefore, the information on your dashboard is for your guidance only and may change based on the auditor’s decision.
Your dashboard - leaderboard

You will also see your programme’s leaderboard on your dashboard. This will show the top ten teams who have completed the most points or actions so far.

If your team is not already in the top 10, you can click ‘show me my team’s league position’ to display your own team.

Don’t worry if you aren’t at the top: each team is different and the aim isn’t to be 1st, but to make the biggest impact you are able to!
Printing or exporting your toolkit

To help you use the toolkit with those who maybe don’t have computer access, or to enable you to use a hard copy of the toolkit to plan with your team, you can print and export it.

These icons let you print the toolkit or export each award type to an excel document.

We would naturally encourage you not to print the toolkit unnecessarily, so hopefully the excel function will help you use the toolkit without needing to print. The excel function also shows you the comments and actions completed, so is a live representation of your work at the point of download.
Submitting your toolkit

When you are happy that you and your team have completed as many actions as you can, uploaded sufficient evidence, and provided relevant comments for your auditor, you are ready to submit your toolkit!

Simply click on the black ‘submit toolkit’ button at the top of the toolkit page and your toolkit will be sent to us for review. We will then be in touch regarding next steps with your award!