

SOS-UK toolkit user guide

September 2024



STUDENTS
ORGANISING FOR
SUSTAINABILITY
UNITED KINGDOM

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require this document in Welsh, or in
another format, please let us know
by contacting hello@sos-uk.org*

About

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

Please note that the toolkit software is used for many different programmes and organisations so some of the information in this guide may differ from what you see when accessing your toolkit. If you are unsure about anything, you can contact your programme lead or toolkit@sos-uk.org.

We are constantly evaluating and developing the toolkit based on the feedback we receive, so do provide us your valuable feedback or ideas, and we will consider it within future developments. Please be aware however that we have limited budget and resources for new features.

Thank you for using the toolkit!

The SOS-UK team



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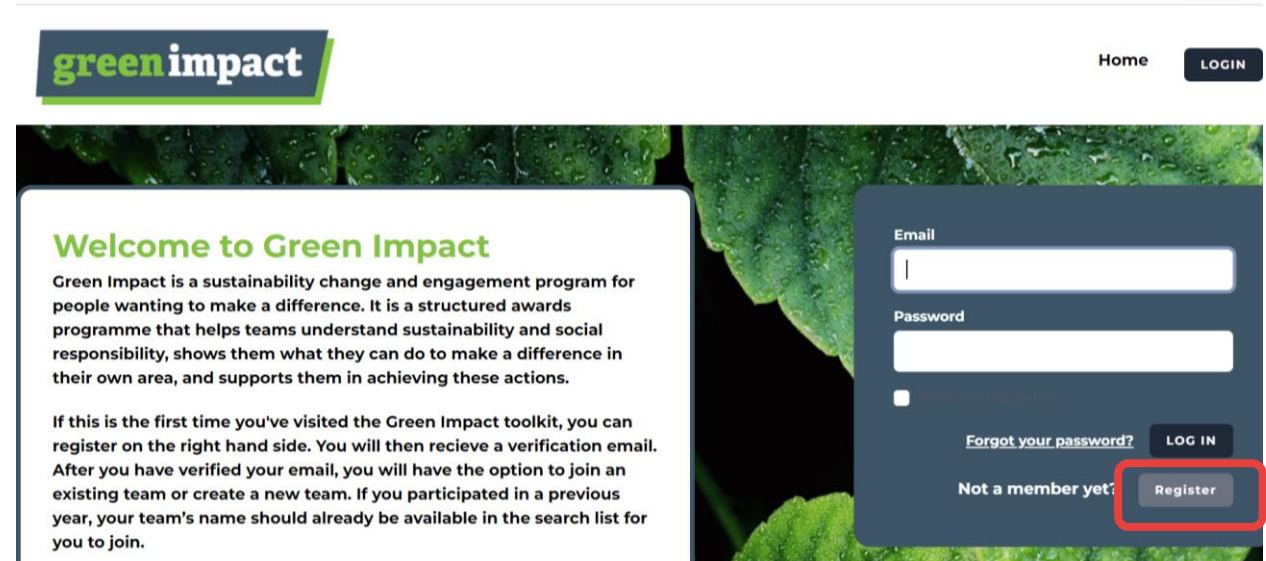
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Registering and logging in

You will be provided with a link to your organisation's bespoke toolkit. It is very important to always follow this link shared directly with you and not attempt to use a search engine as you may end up on the wrong page. Please contact us if you are unsure about the correct link to use.

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

Once you have registered for the first time, use the log-in box to log-in each time.



The screenshot shows the Green Impact website interface. At the top left is the 'green impact' logo. At the top right are links for 'Home' and 'LOGIN'. The main content area features a 'Welcome to Green Impact' section with a description of the program and instructions for new users. On the right side, there is a login and registration form with fields for 'Email' and 'Password', a 'LOG IN' button, a 'Forgot your password?' link, and a 'Register' button highlighted with a red box.

green impact

Home LOGIN

Welcome to Green Impact

Green Impact is a sustainability change and engagement program for people wanting to make a difference. It is a structured awards programme that helps teams understand sustainability and social responsibility, shows them what they can do to make a difference in their own area, and supports them in achieving these actions.

If this is the first time you've visited the Green Impact toolkit, you can register on the right hand side. You will then receive a verification email. After you have verified your email, you will have the option to join an existing team or create a new team. If you participated in a previous year, your team's name should already be available in the search list for you to join.

Email
|

Password

[Forgot your password?](#) LOG IN

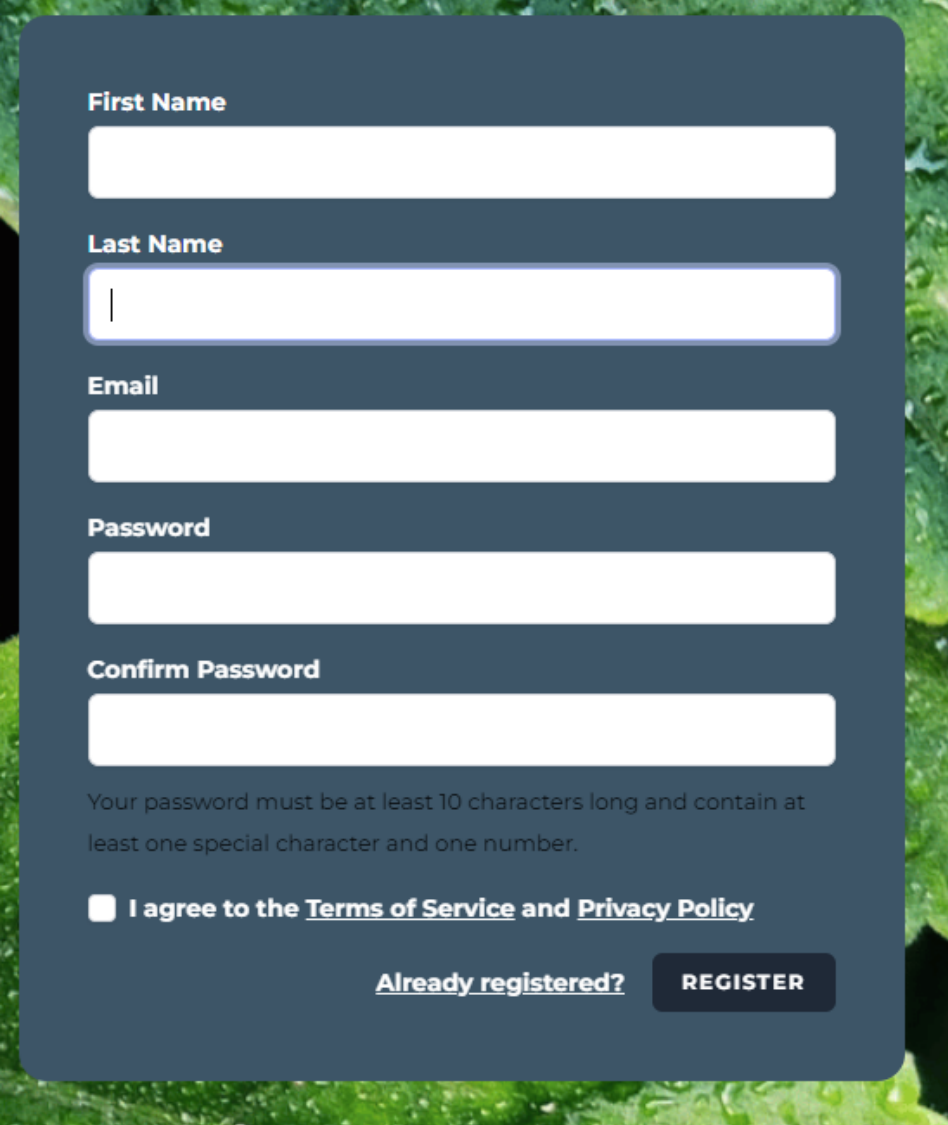
Not a member yet? **Register**

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 might 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.

A screenshot of a registration form on a dark blue background. The form contains five input fields: 'First Name', 'Last Name', 'Email', 'Password', and 'Confirm Password'. Below the 'Confirm Password' field is a text requirement: 'Your password must be at least 10 characters long and contain at least one special character and one number.' At the bottom, there is a checkbox labeled 'I agree to the Terms of Service and Privacy Policy' and a 'REGISTER' button. A link for 'Already registered?' is also present.

First Name

Last Name

Email

Password

Confirm Password

Your password must be at least 10 characters long and contain at least one special character and one number.

I agree to the [Terms of Service](#) and [Privacy Policy](#)

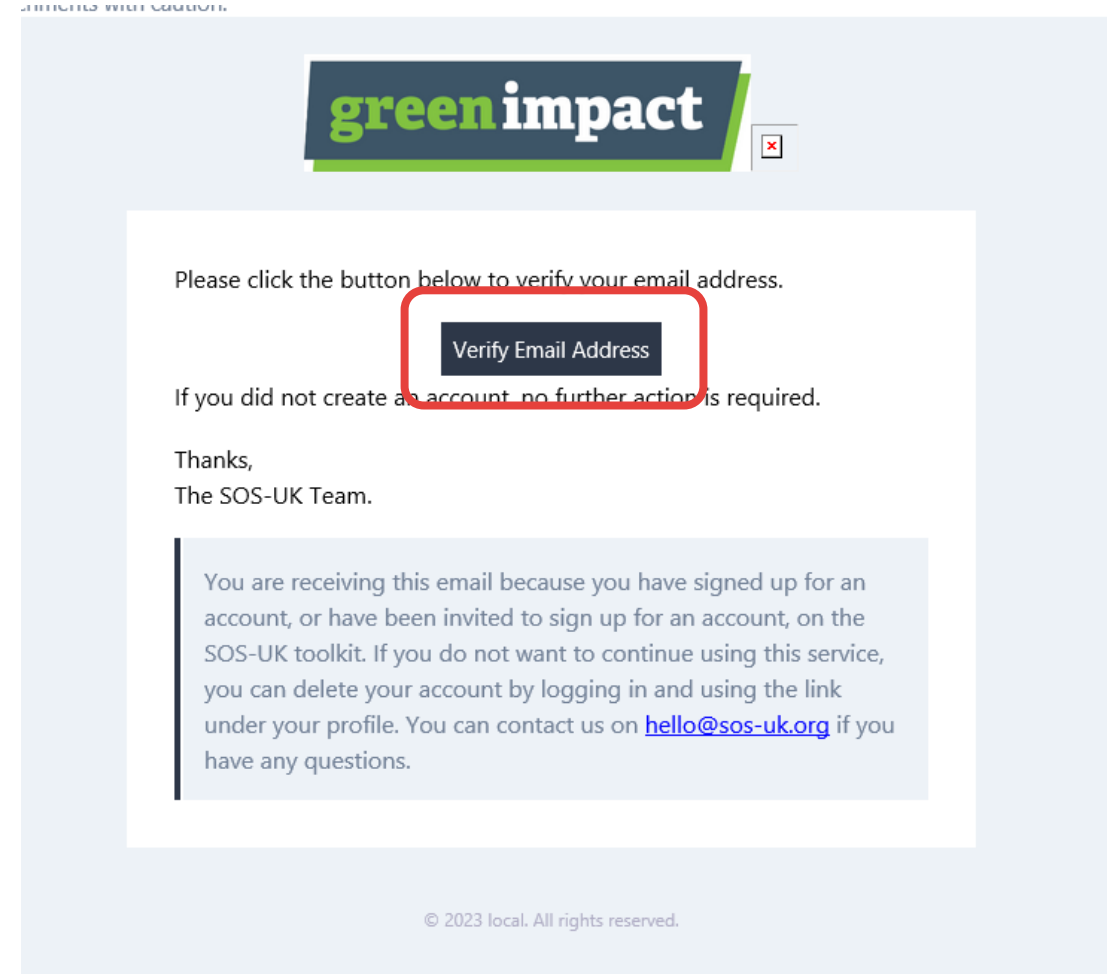
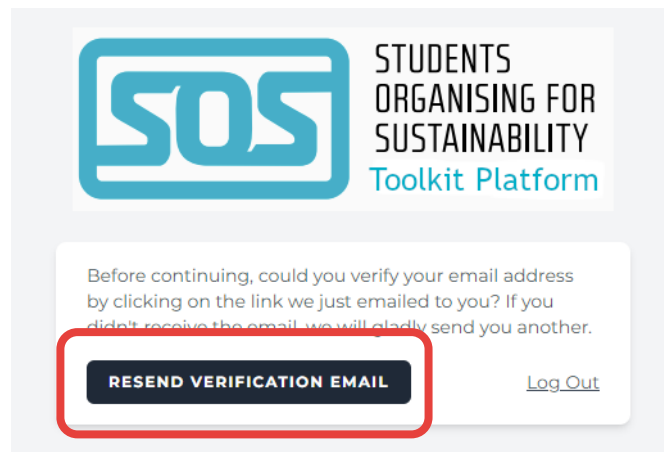
[Already registered?](#) **REGISTER**

Registering and logging in: verifying your email

New feature

You will receive a verification email to the email address you registered with. This is valid for 60 minutes.

Click the 'verify email address' button to activate your account. If you do not receive an email or you have not verified within 60 minutes, you can request another email by logging into the toolkit and clicking 'resend verification email'.



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.
3. You may be prompted to answer some additional questions about your team to set up your team profile.

Additional Profile Information

If you have just registered, once you have filled out the required questions below, you can join a team and toolkit by heading to the Toolkit in the menu.

Please answer the following additional questions

Please note that * indicates the field is required.

Role

Are you a student? *

SAVE

Join or create a Team

Already know the team you want to join? Search for them below.

Search teams

JOIN TEAM

If your team doesn't already exist, you can create a brand new team

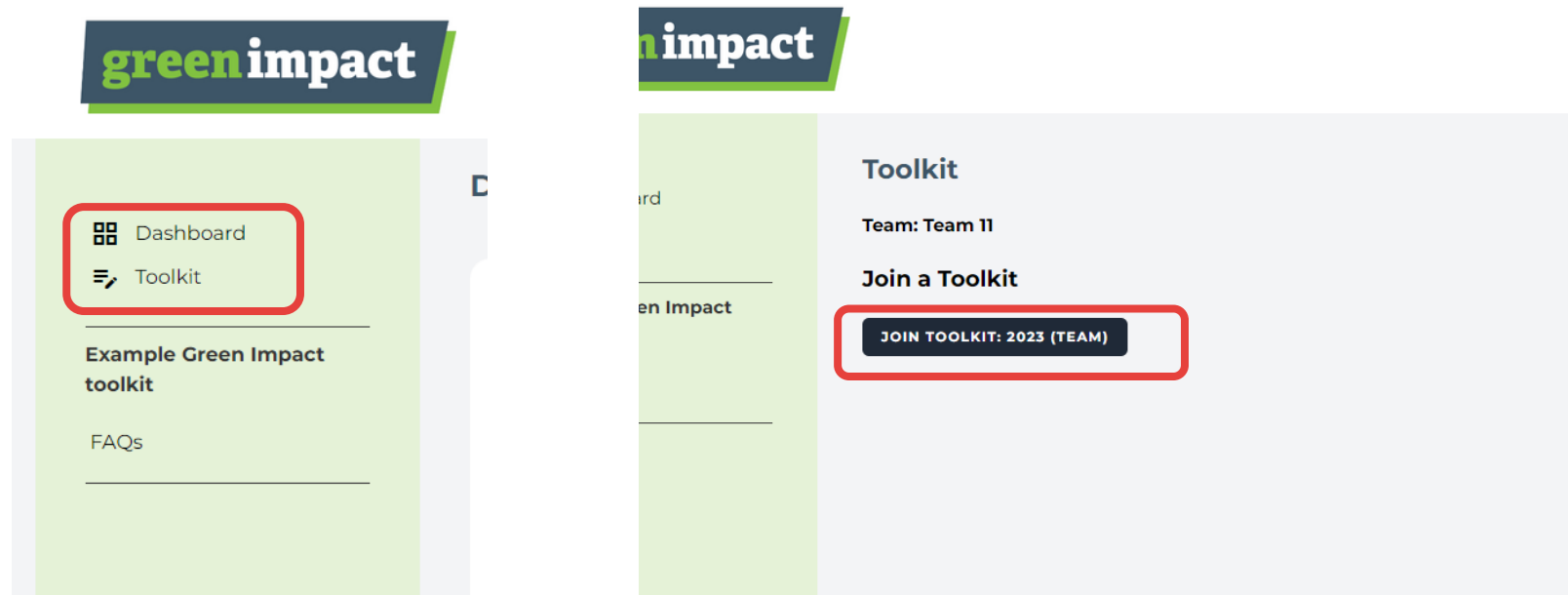
Team name

CREATE

Joining your toolkit

Once you have answered and saved any profile questions, click 'Toolkit' on the left-hand menu to join your toolkit,

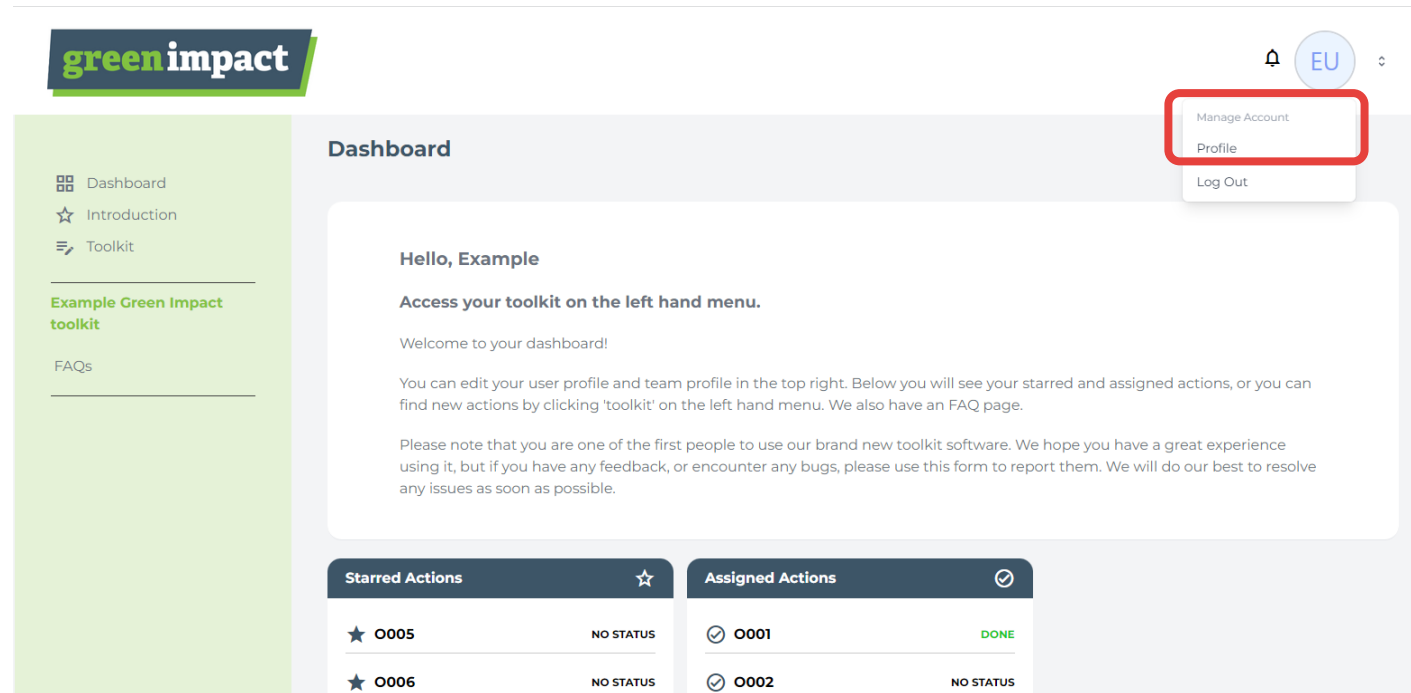
Once on the 'Toolkit' page click the black 'Join Toolkit' button to sign your team up to the current active toolkit. Go to [page 12](#) for how to use the toolkit.



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.



The screenshot shows the Green Impact dashboard interface. The logo 'green impact' is in the top left. A navigation menu on the left includes 'Dashboard', 'Introduction', and 'Toolkit'. The main content area is titled 'Dashboard' and contains a welcome message for 'Example' and instructions to access the toolkit. Below the main content are two sections: 'Starred Actions' and 'Assigned Actions'. The 'Assigned Actions' section shows two items: 'O001' with a 'DONE' status and 'O002' with a 'NO STATUS' status. In the top right corner, a user profile dropdown menu is open, showing options for 'Manage Account', 'Profile', and 'Log Out'. The 'Profile' option is highlighted with a red box.

green impact

Dashboard

Introduction

Toolkit

Example Green Impact toolkit

FAQs

Dashboard

Hello, Example

Access your toolkit on the left hand menu.

Welcome to your dashboard!

You can edit your user profile and team profile in the top right. Below you will see your starred and assigned actions, or you can find new actions by clicking 'toolkit' on the left hand menu. We also have an FAQ page.

Please note that you are one of the first people to use our brand new toolkit software. We hope you have a great experience using it, but if you have any feedback, or encounter any bugs, please use this form to report them. We will do our best to resolve any issues as soon as possible.

Starred Actions

★ O005	NO STATUS
★ O006	NO STATUS

Assigned Actions

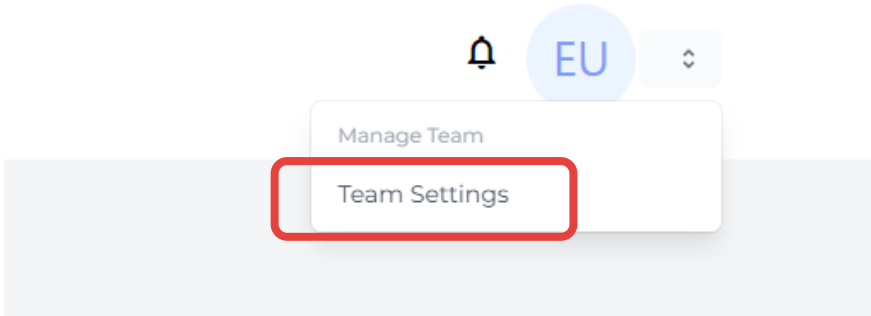
✔ O001	DONE
✔ O002	NO STATUS

Manage Account

Profile

Log Out

Amending your team's profile



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

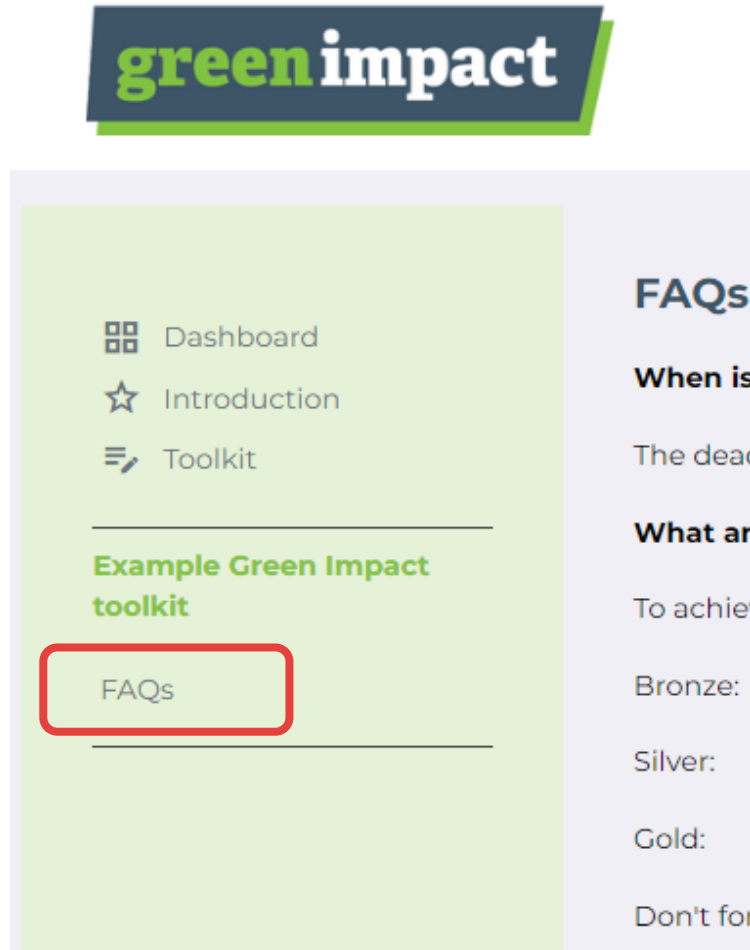
On the team profile you can:

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

A screenshot of the 'Team Name' and 'Add Team Member' sections of a team profile. The 'Team Name' section has a title 'Team Name' and a subtitle 'The team's name and owner information.' It displays 'Team Owner' as 'EU Example User' and a text input field for 'Team Name' containing 'Team 1'. A 'SAVE' button is at the bottom right. The 'Add Team Member' section has a title 'Add Team Member' and a subtitle 'Add a new team member to your team, allowing them to collaborate with you.' It includes a subtitle 'Please provide the email address of the person you would like to add to this team.' and an 'Email' input field.

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, such as dates to remember and commonly asked questions.

Your toolkit

Example Green Impact toolkit 2023 Toolkit

Team: Team 1

All the available actions in your toolkit can be seen below. Not all actions will necessarily be relevant to you, so you can use the filters to find and sort the actions. You can also star actions for easy access on your dashboard, and assign actions to other team members (assigned actions will also appear on the dashboard).

Filters

Area Award Level Theme Starred

Status Assigned To SDG

Seeing 63 results based on current applied filters. Sort: default

Sort By filter Ascending

☆ TEST TOOLKIT

Criteria Further information How you will be audited Comments & evidence

Please note, you are currently viewing the test toolkit. This toolkit is not designed to be completed and you may have reached it in error. Please contact toolkit@sos-uk.org to get access to your toolkit.

Assigned to: Unassigned

Total Points: 1

NOT DONE

DONE

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.

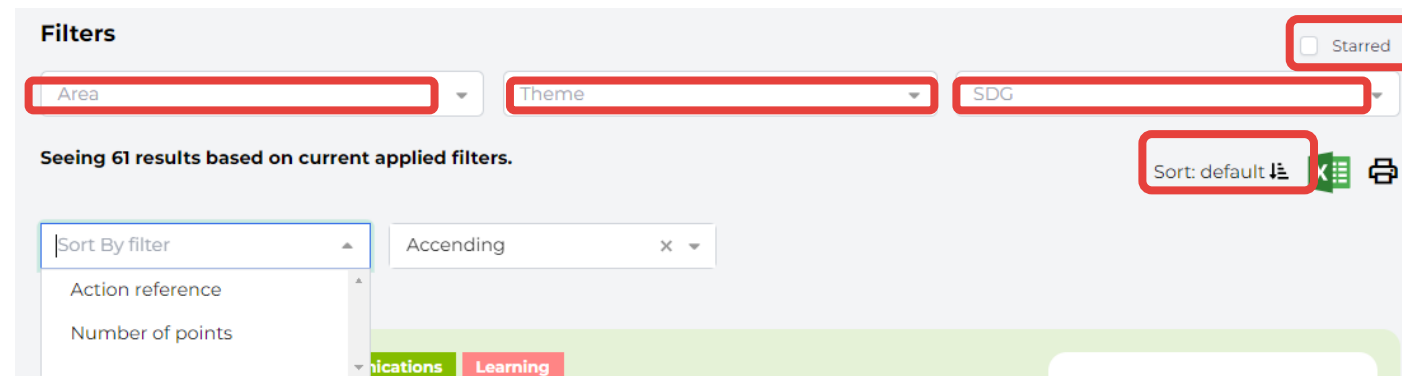
Check the homepage or help page to read more about what actions you need to complete to get your award, as this varies from programme to programme.

Your toolkit - filtering and sorting

Each toolkit is different and organised in a different way, but there will always be some filters available to filter the list of actions. Your programme may use some or all of these filters:

- **Area:** filter actions by relevance for specialised teams, so you may expect to see things like 'General', 'Office', 'Catering';
- **Award Level:** filter actions by specific award levels if these are used, such as 'Bronze', 'Silver', 'Gold';
- **Theme:** filter by topics such as 'Energy', 'Water', 'Communication';
- **Status:** filter by the current status of actions, such as 'Done' or 'In Progress'
- **Assigned To:** filter by actions assigned to you or a different user in your team
- **SDG:** filter actions that support the selected UN Sustainable Development Goal.

Additionally, there is an option to select only starred actions and to sort actions.



Completing actions

Each action comprises 4 sections:

1. Criteria - this is the information on what action you can take in your team to make an impact.
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 will be asked to provide.
4. Comments & evidence - your space to record progress to date, coordinate with your team members and upload final pieces of evidence.

☆ 0003 General Energy

Criteria Further information How you will be audited Comments & evidence

The team has provided information on at least five energy saving opportunities to all team staff within the last 12 months.

Total Points: 1

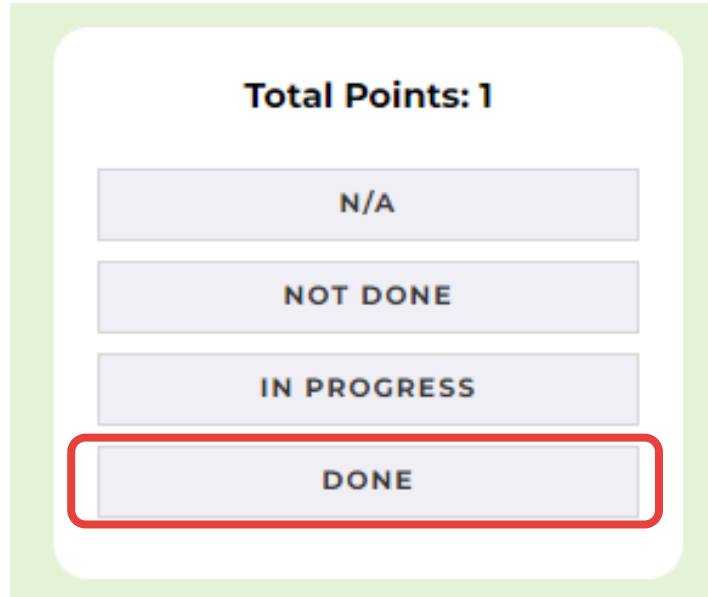
N/A

NOT DONE

IN PROGRESS

DONE

Completing actions



Total Points: 1

N/A

NOT DONE

IN PROGRESS

DONE

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.

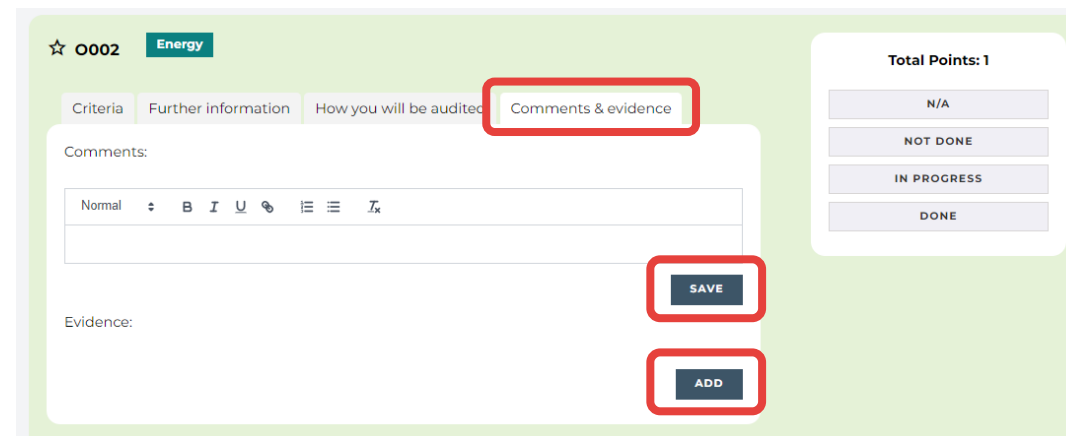
You will only accrue points for actions which have been marked as ‘Done’.

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 (PDF, JPEG, PNG, Excel, PowerPoint, Word) up to a **maximum size of 8MB**.





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. Please be mindful of our digital footprint by not uploading lots of large files.



☆ O002 Energy

Criteria Further information How you will be audited **Comments & evidence**

Comments:

Normal B I U    

Evidence:

SAVE

ADD

Total Points: 1

N/A

NOT DONE

IN PROGRESS

DONE

Uploading evidence and leaving comments

The screenshot shows a software interface for managing evidence and comments. At the top, there is a star icon, the number '0002', and a green 'Energy' tag. Below this are four tabs: 'Criteria', 'Further information', 'How you will be audited', and 'Comments & evidence'. The 'Comments & evidence' tab is active. On the right side, there is a 'Total Points: 1' section with four buttons: 'N/A', 'NOT DONE', 'IN PROGRESS' (highlighted in dark blue), and 'DONE'. The main content area is divided into two sections: 'Comments:' and 'Evidence:'. The 'Comments:' section contains a comment box with a red 'x' delete icon, a blue 'EU' profile picture, the text 'Test comment 1', and a timestamp 'comment added by Example User - 20/01/2023 13:42'. Below the comment box is a rich text editor with a toolbar and a 'SAVE' button. The 'Evidence:' section contains two file upload items, each with a red 'x' delete icon, a file icon, a filename, a size, and a timestamp: 'Example file 1.docx (11.6 KB) uploaded by Example User - 01/20/2023 01:39' and 'Example file 2.xlsx (8.2 KB) uploaded by Example User - 01/20/2023 01:39'. Below the evidence list is an 'ADD' button. At the bottom left, there is an 'Assigned to:' field with 'Example User' and a dropdown menu icon.

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.

Write your comment in the text box and click 'save' to publish it. You can delete your comments by clicking the red x if they are no longer relevant, but you cannot edit published comments.

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 by clicking the red x 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 to star it, and click again to remove the star. 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 then appear on that user's personal dashboard. You cannot 'unassign' an action once it has been assigned, but you can reassign it to someone else. Note: Your auditor will **not** check that the person who has been assigned the action was the one to complete it.

☆ 001 General Communications Learning

Criteria Further information How you will be audited Comments & evidence

Environmental issues, including Green Impact participation, are regularly raised at staff meetings.

17 PARTNERSHIPS FOR THE GOALS

Total Points: 1

N/A

NOT DONE

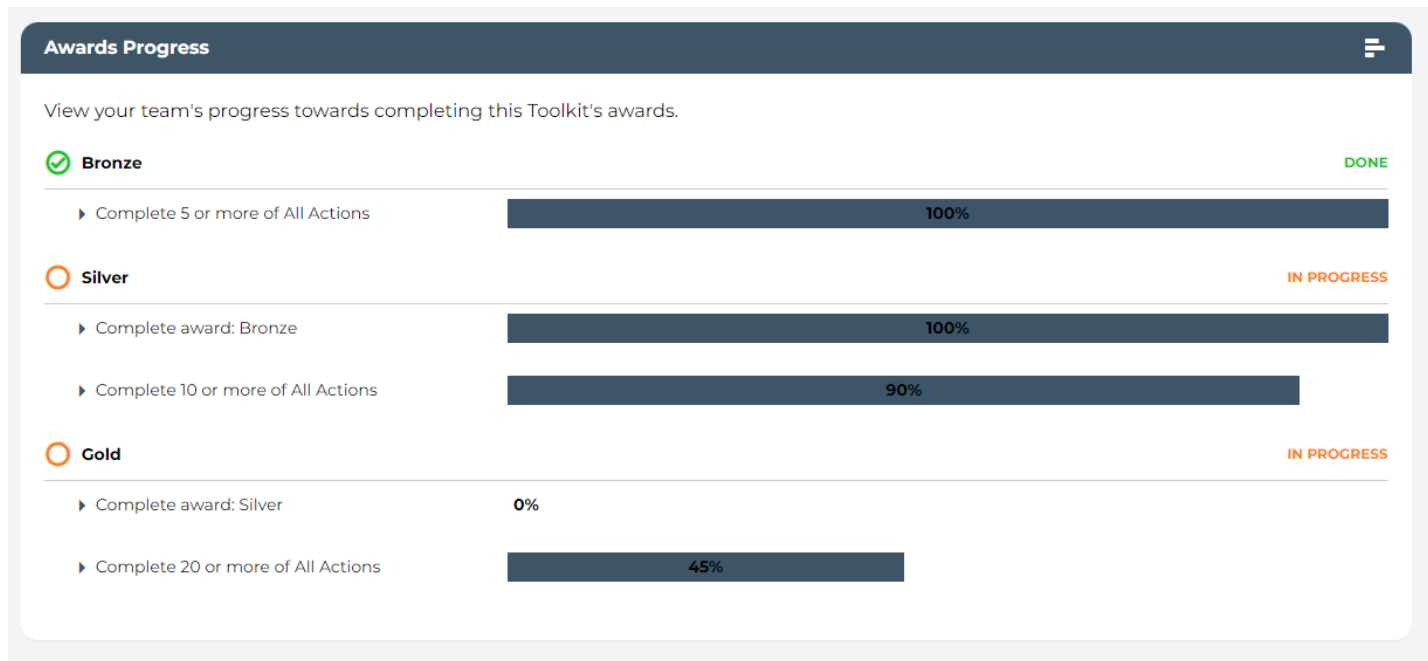
IN PROGRESS

DONE

Assigned to: Example User

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.

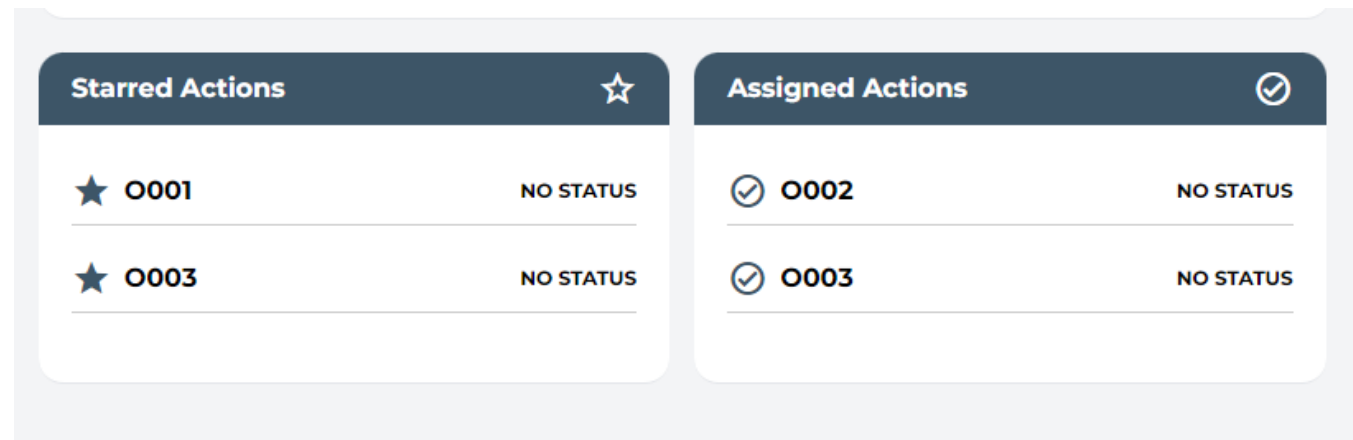


Don't forget that your final award is subject to an audit after you have submitted your toolkit. Therefore, the information on your dashboard is for **your guidance only** and may change based on the auditor's decision.

Your dashboard

On your dashboard, you will see your starred actions and assigned actions. Starred actions are at the individual user level rather than the team level so you will only see actions which you have personally starred.

If you click any of these actions from the dashboard, you will be taken directly to that action within the toolkit for easy access. From the toolkit, you can un-star or reassign the action if needed.



The screenshot displays two side-by-side panels. The left panel, titled 'Starred Actions' with a star icon, lists two items: '★ O001' and '★ O003', both with 'NO STATUS' to their right. The right panel, titled 'Assigned Actions' with a checkmark icon, lists two items: '✔ O002' and '✔ O003', both with 'NO STATUS' to their right.

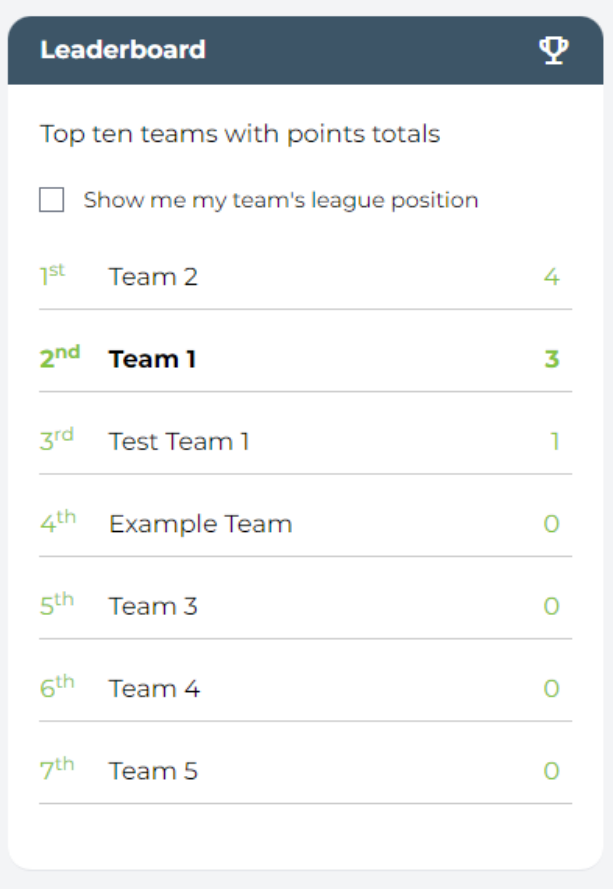
Starred Actions	Assigned Actions
★ O001 NO STATUS	✔ O002 NO STATUS
★ O003 NO STATUS	✔ O003 NO STATUS


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!

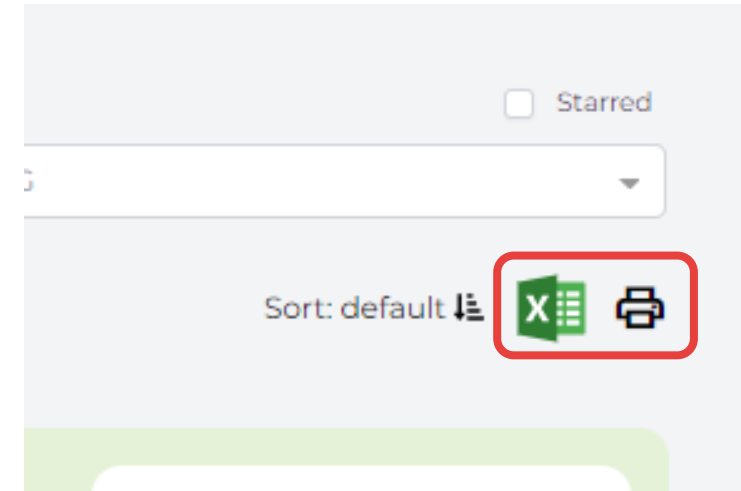


Leaderboard 		
Top ten teams with points totals		
<input type="checkbox"/>	Show me my team's league position	
1 st	Team 2	4
2 nd	Team 1	3
3 rd	Test Team 1	1
4 th	Example Team	0
5 th	Team 3	0
6 th	Team 4	0
7 th	Team 5	0

Printing or exporting your toolkit

To help you use the toolkit with those who don't have computer access or who prefer to work offline, you can print and export it.

These icons at the top right of your 'toolkit' page let you print the toolkit or export to an excel document.

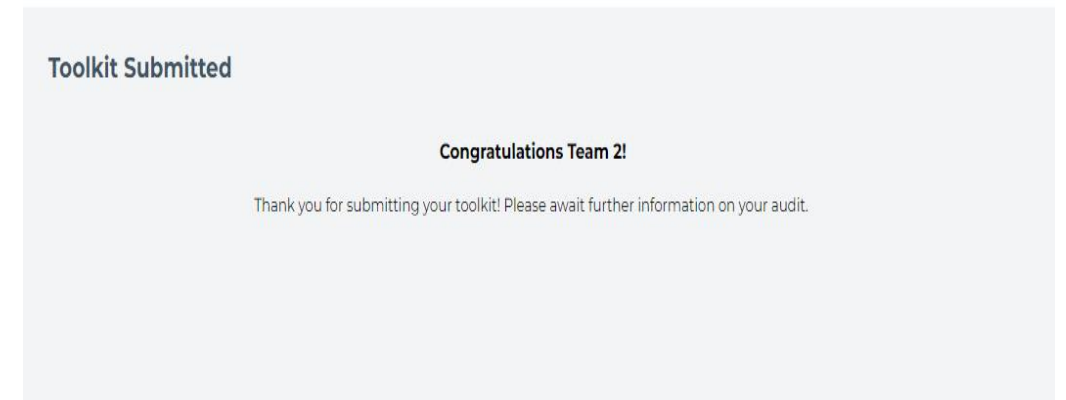
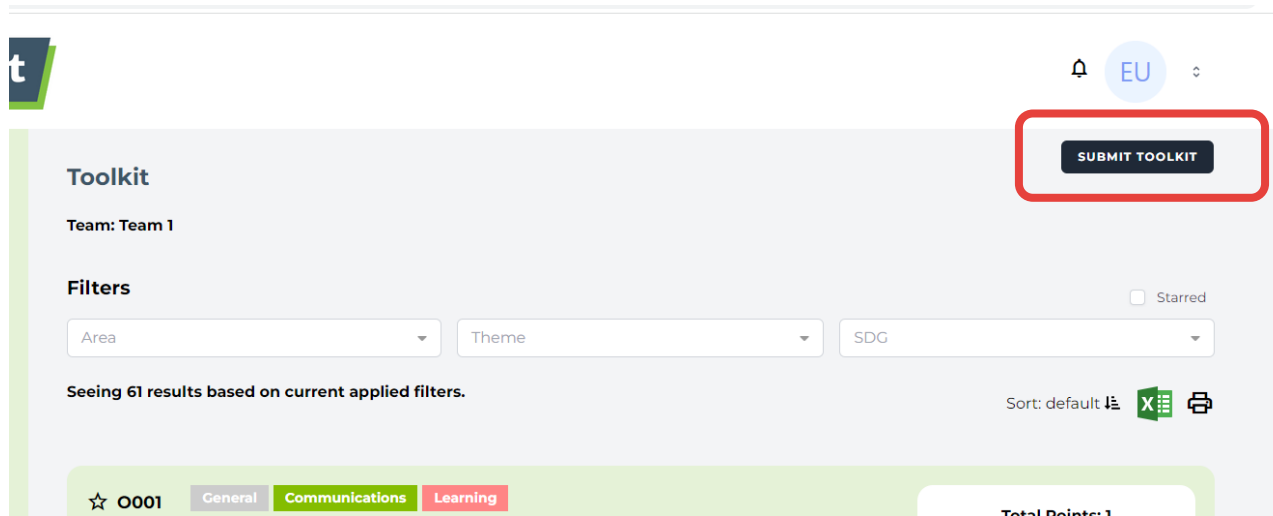


We would naturally encourage you **not to print the toolkit unnecessarily**. The excel function will help you use the toolkit without needing to print. The excel function also shows you the comments and actions completed, so is a live representation of your work at the point of download.

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. All members of your team will receive an email to confirm the toolkit has been submitted. We will then be in touch regarding next steps with your award!



Retracting and viewing your submitted toolkits

After submitting your toolkit, you can view the toolkit and retract your submission. This can be found at the bottom of the 'dashboard' page in the 'previous toolkits' section.

By pressing 'View Toolkit' you can view any of your previously submitted toolkits to review/copy/download the actions, comments and evidence from previous toolkits. You will not be able to make changes in view-only mode.

By pressing 'Retract Submission', your current toolkit will be unsubmitted and you can make changes. Please note, you will only be able to retract your submission for the active toolkit before award levels are finalised, after which you will only be able to view. Make sure to re-submit your toolkit on the 'toolkits' page once you have made any changes.

Previous Toolkits

2023 (team)

Status	Actions	Completed Points	Completed Actions	Awards obtained
Submitted (Monday 15th July 2024 17:31:04)	Awaiting Audit	2 out of a possible 63	2 out of a possible 63	N/A

RETRACT SUBMISSION VIEW TOOLKIT

If you require further
assistance please contact
toolkit@sos-uk.org