SOS-UK toolkit user guide
September 2024

STUDENTS ORGANISING FOR SUSTAINABILITY UNITED KINGDOM

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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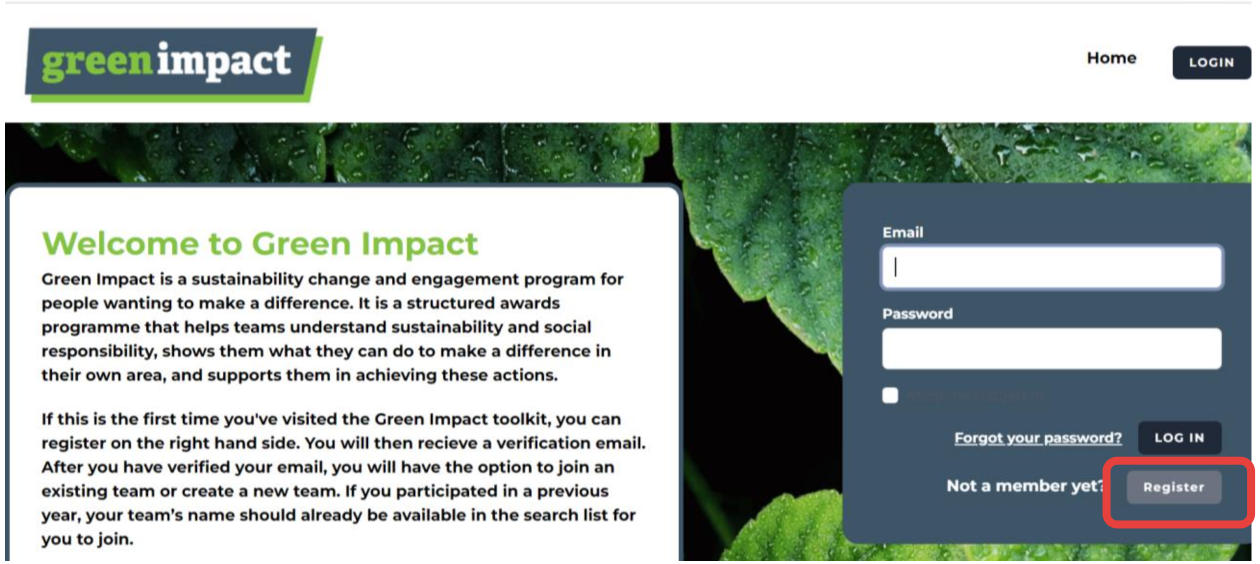
Registering and logging in

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.

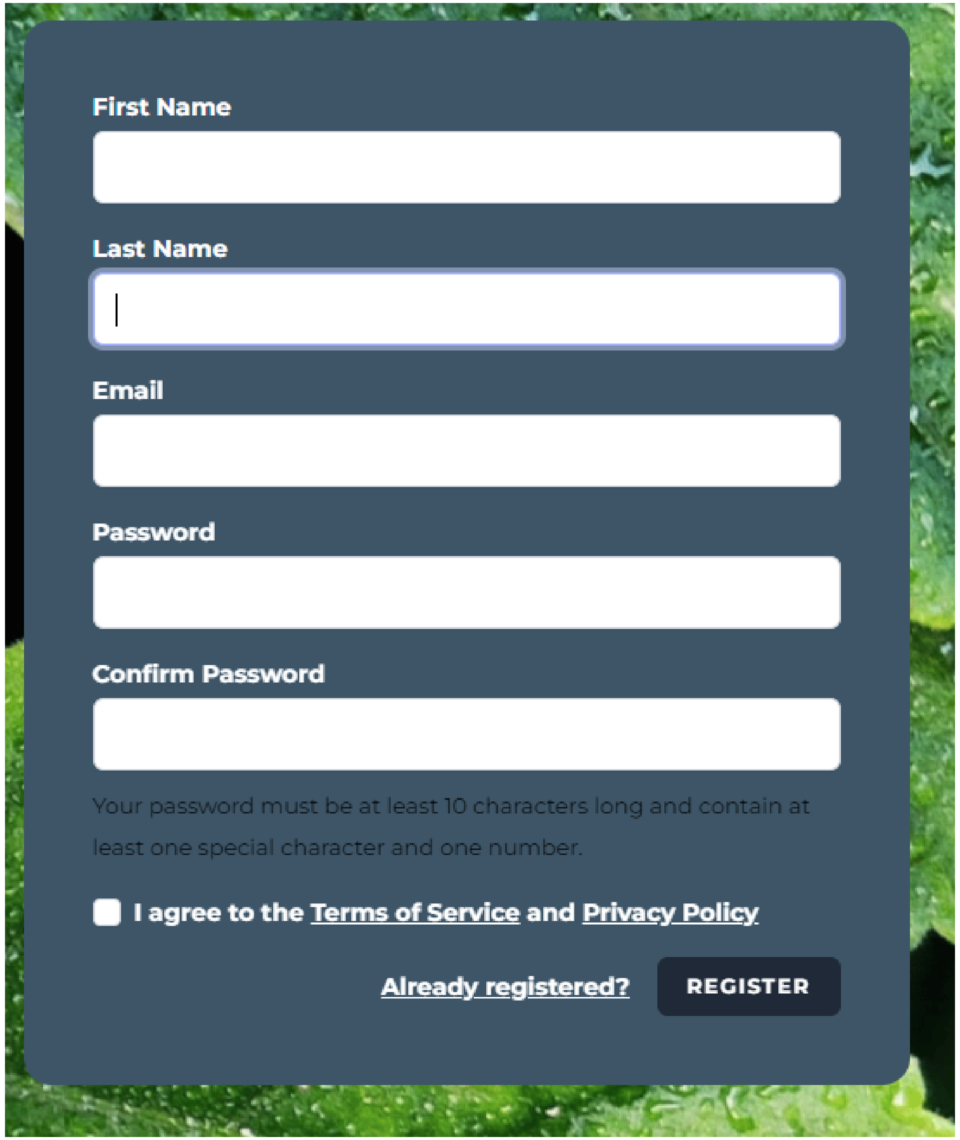
Once you have registered for the first time, use the log-in box to log-in each time.

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.

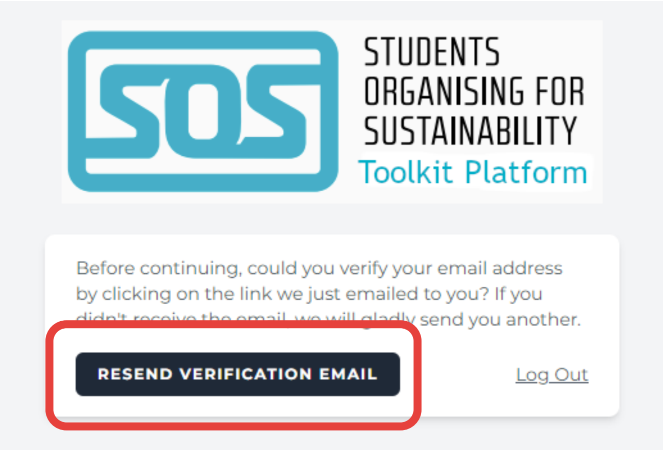


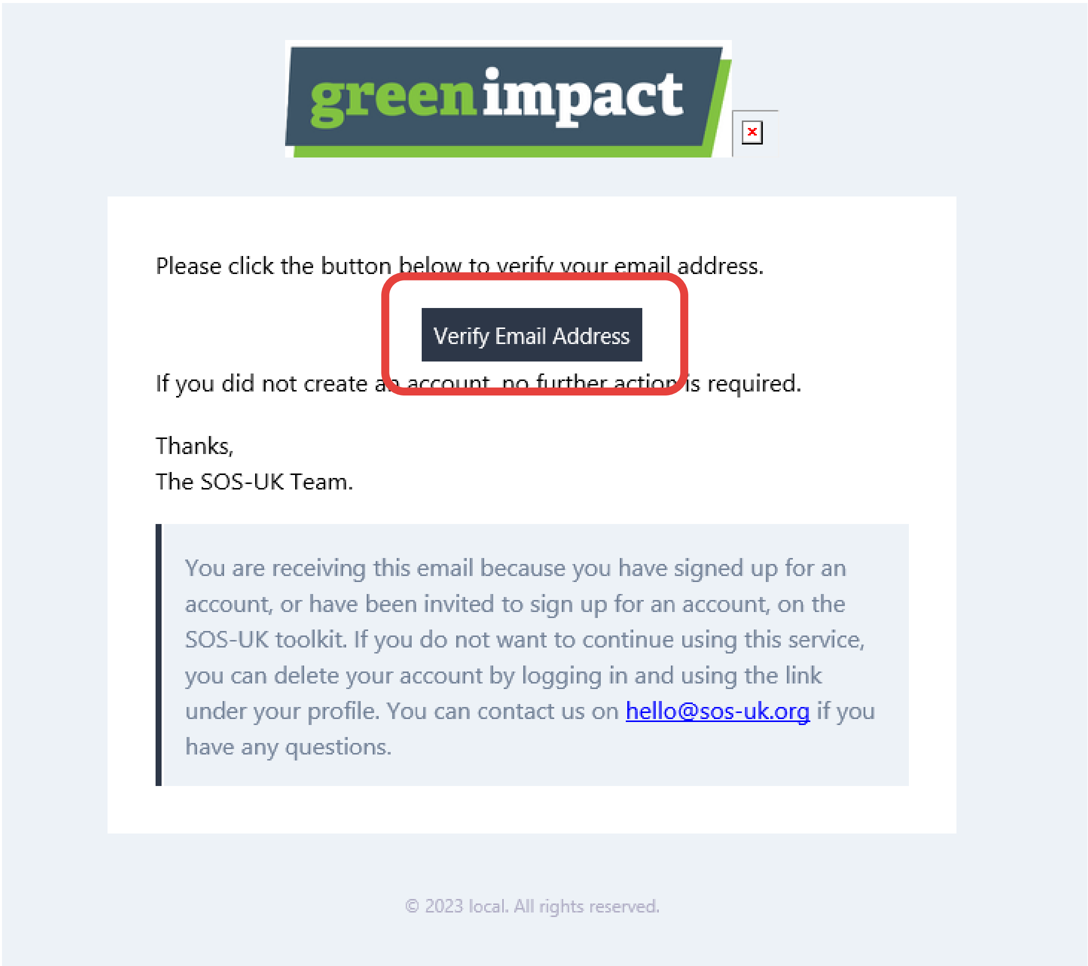
Registering and logging in: verifying your email

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'.





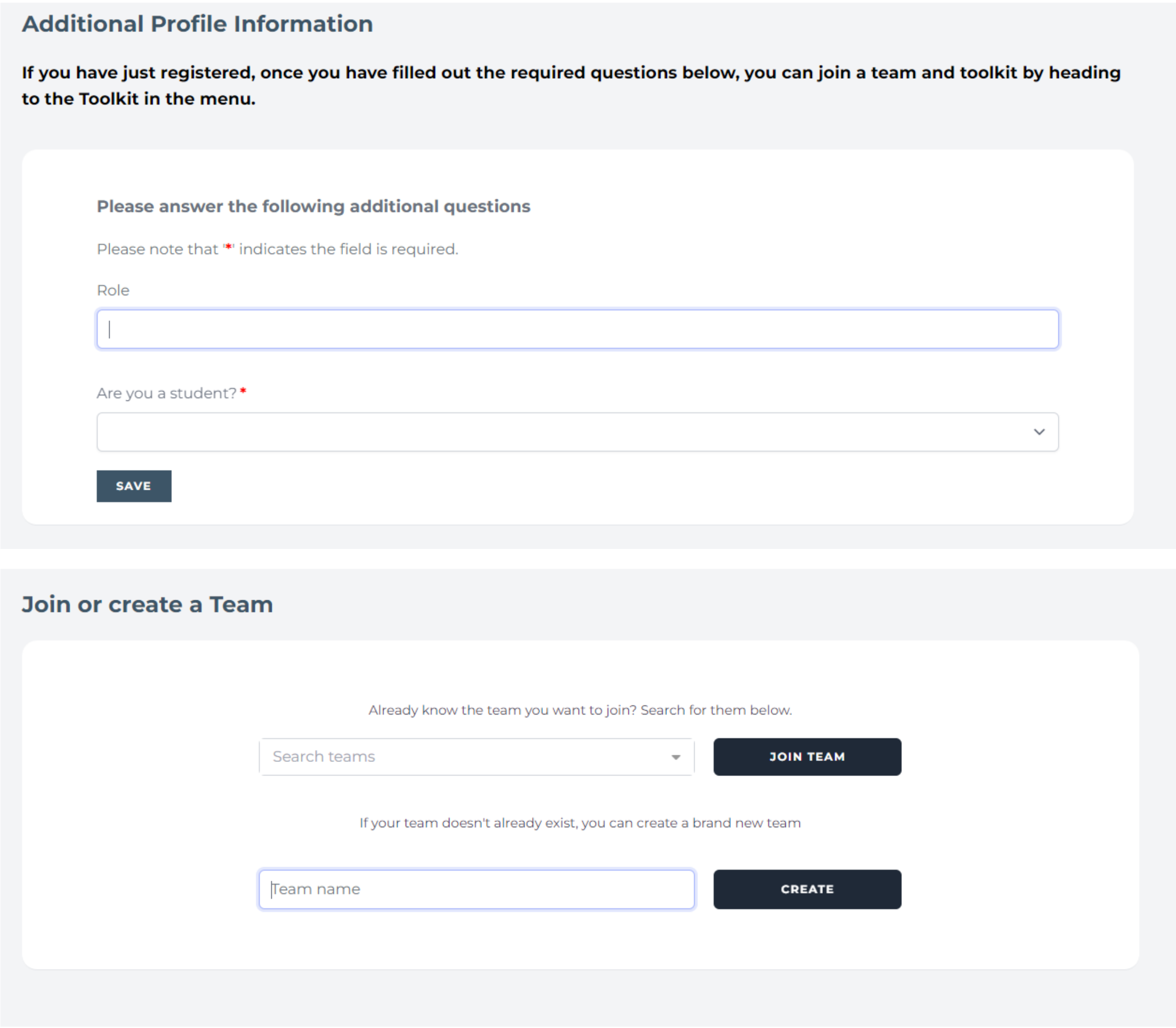
Joining a team

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.

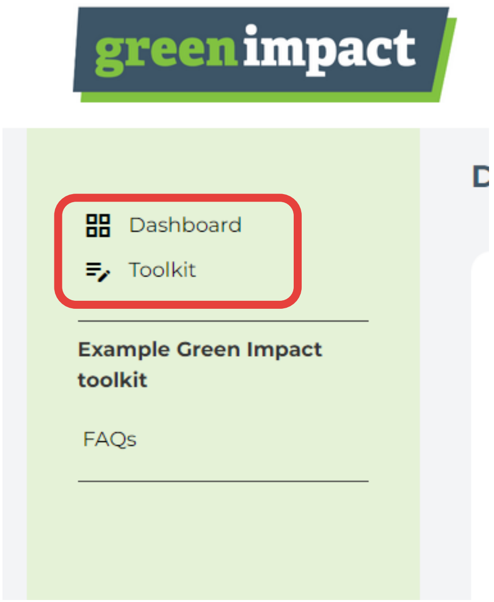
3. You may be prompted to answer some additional questions about your team to set up your team profile.

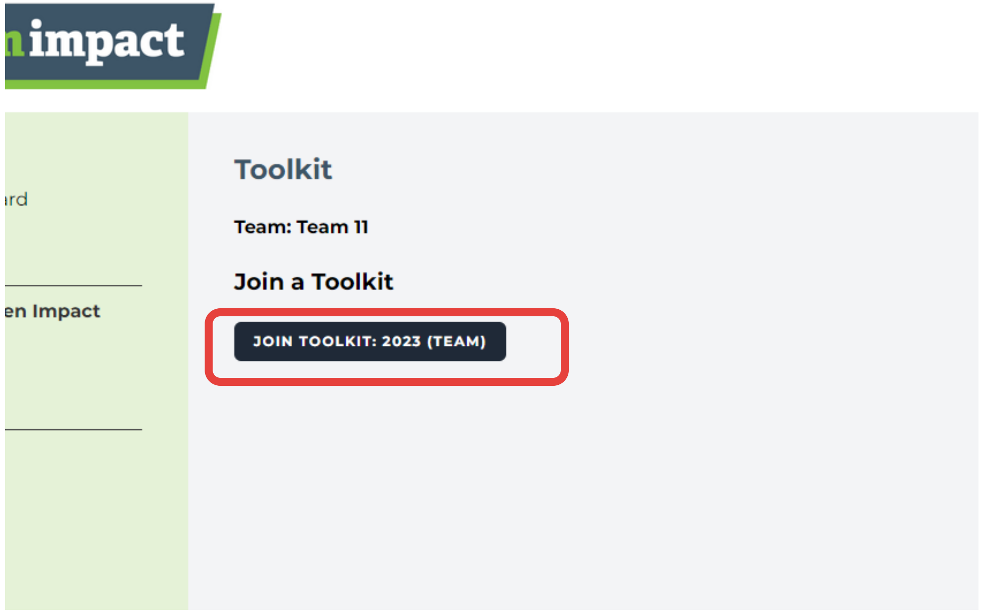


Joining your toolkit

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.

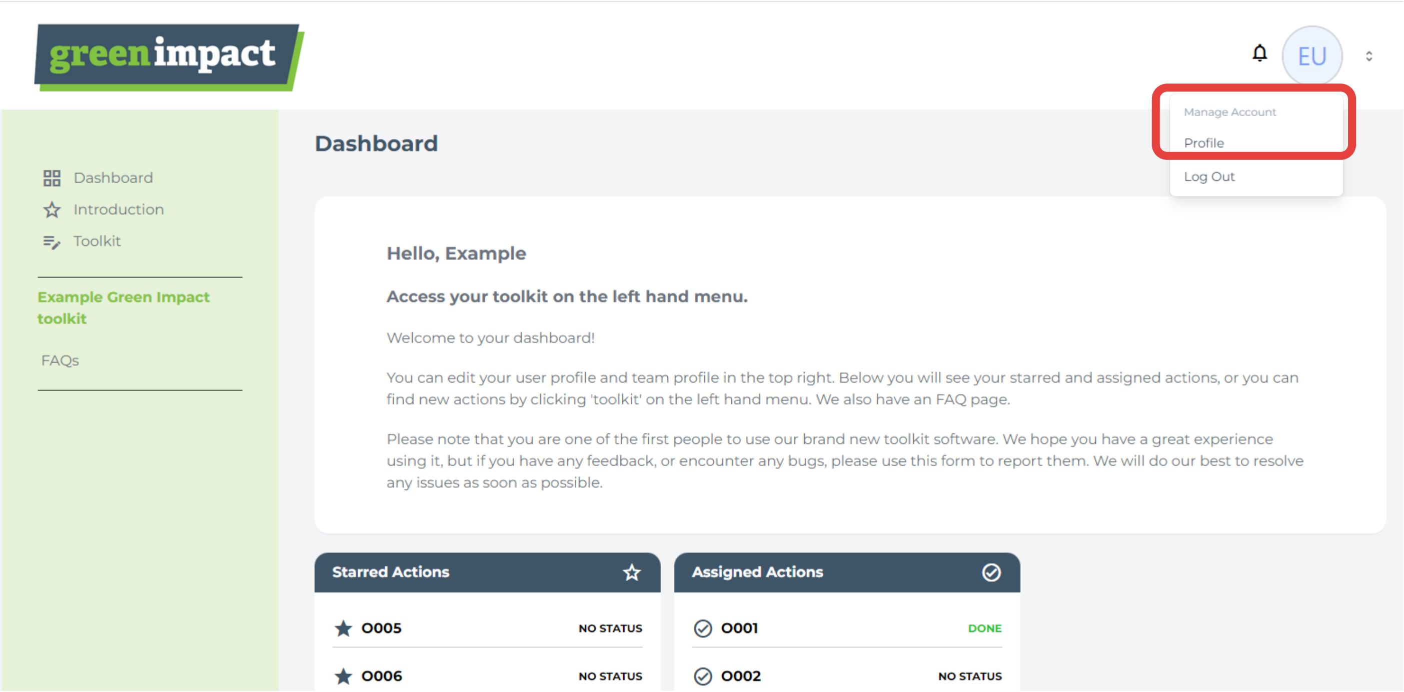




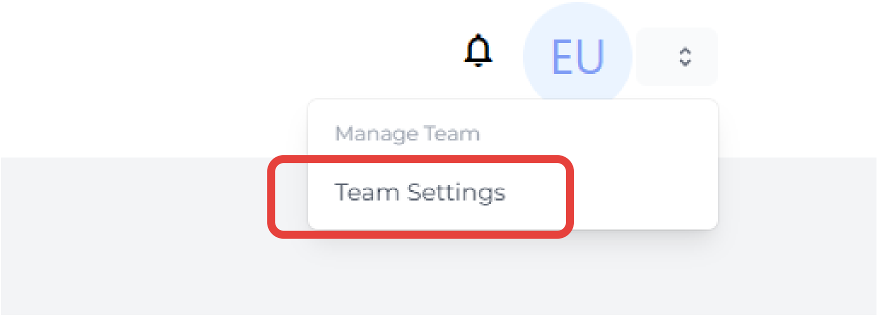
Amending your user profile

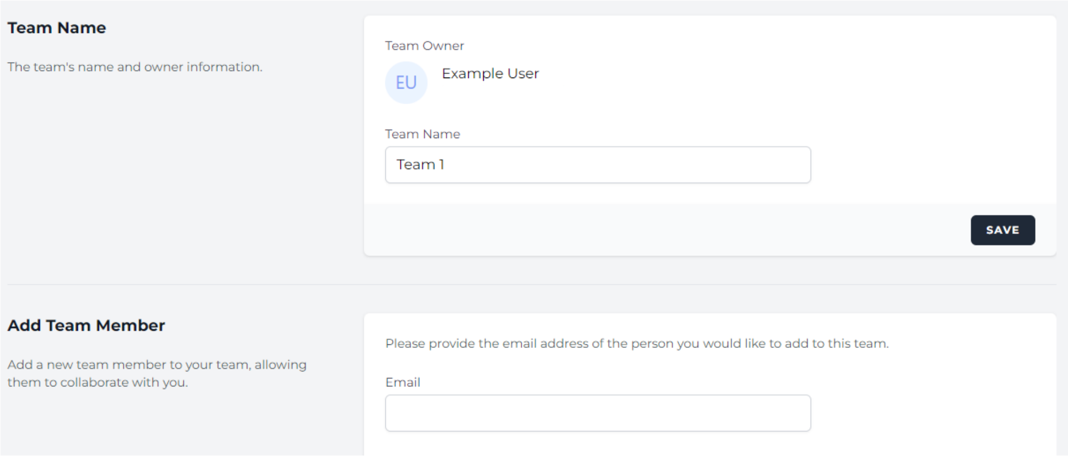
If you need to change any of your profile details after registration, you can access your profile by clicking your avatar in the top right of the screen.

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.



Amending your team’s profile





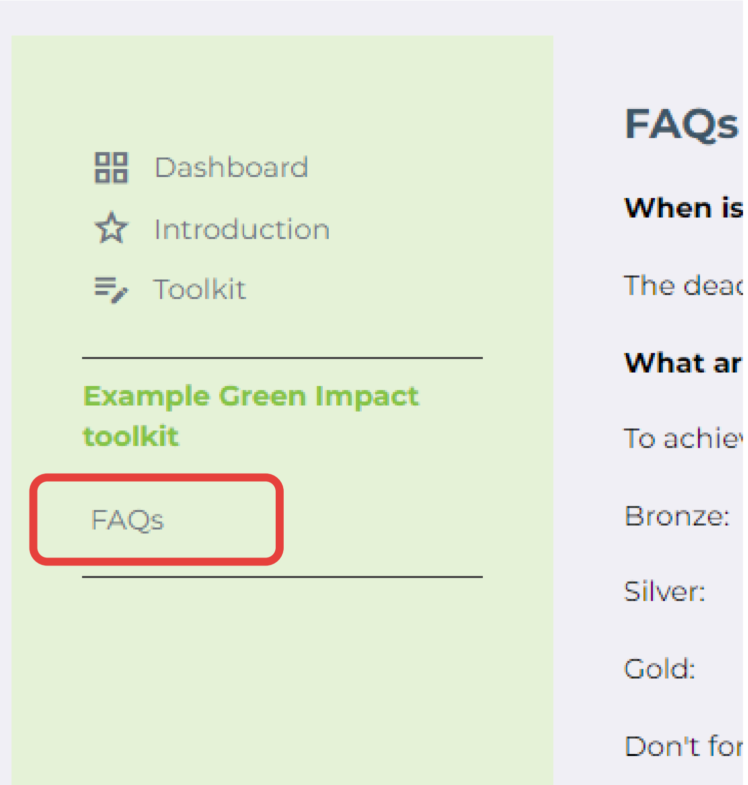
Access your team’s profile in the top right, by clicking ‘team settings’.

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.

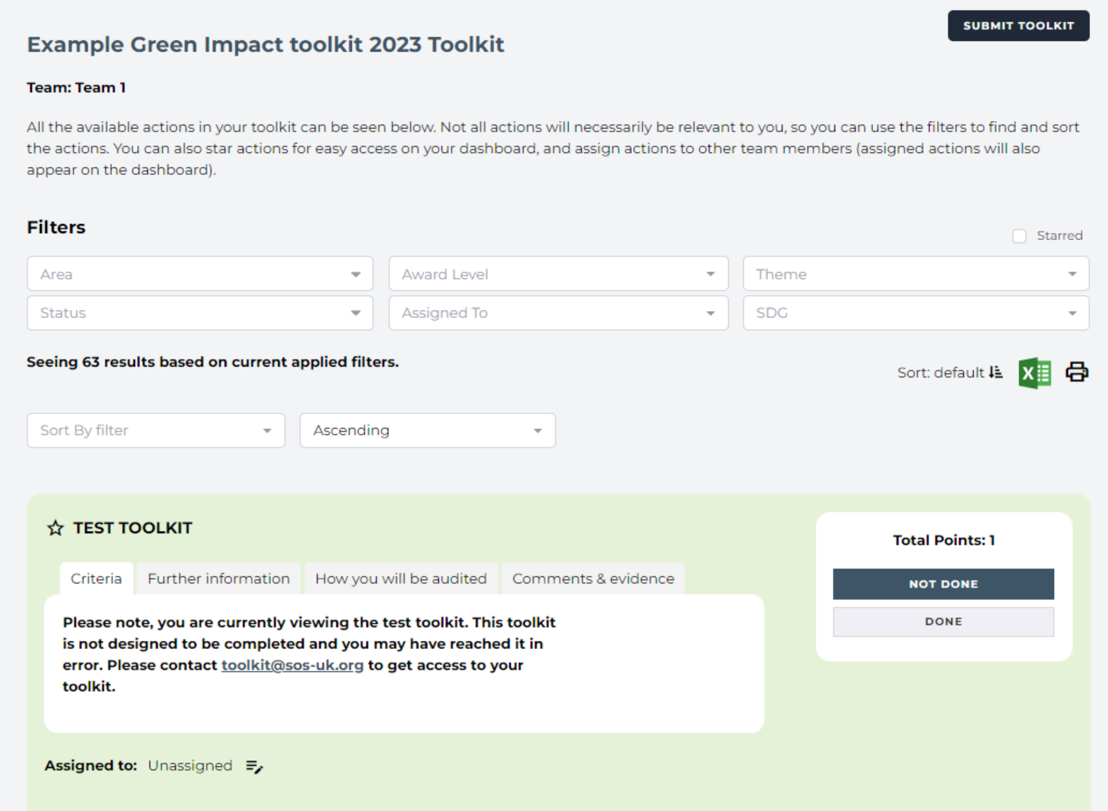
How your programme works



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, such as 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.

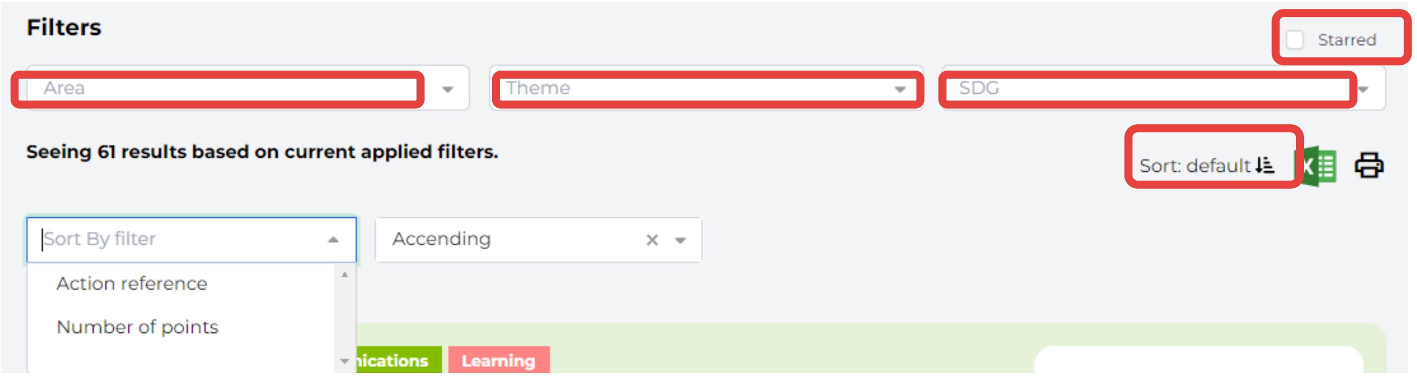
Check the homepage or help page to read more about what actions you need to complete to get your award, as this varies from programme to programme.

Your toolkit – 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.

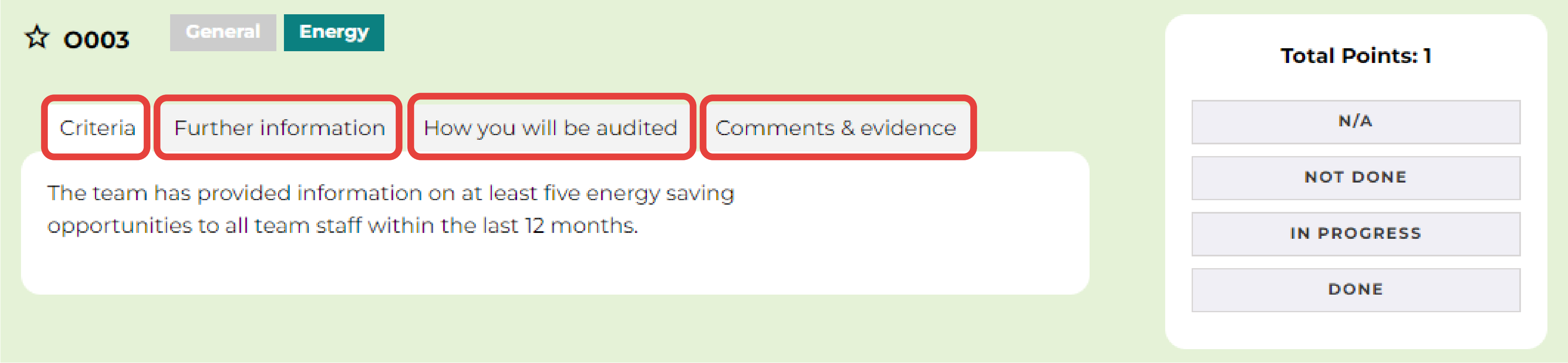
Additionally, there is an option to select only starred actions and to sort actions.



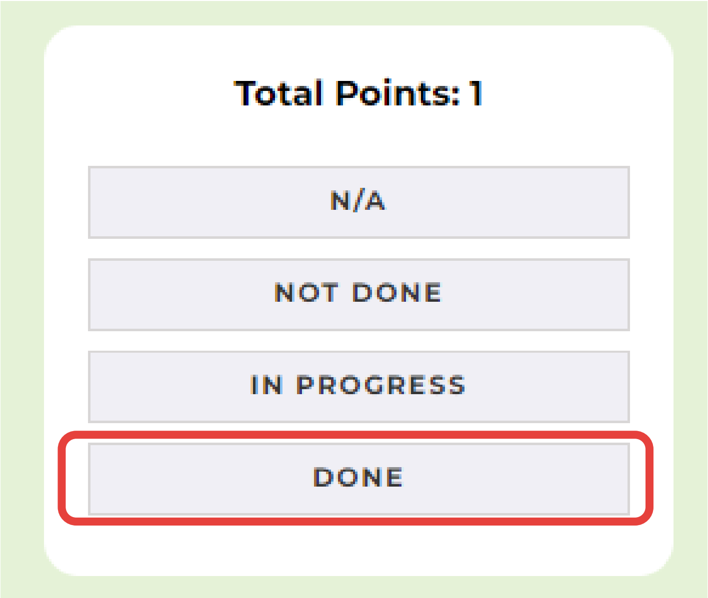
Completing actions

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.



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.

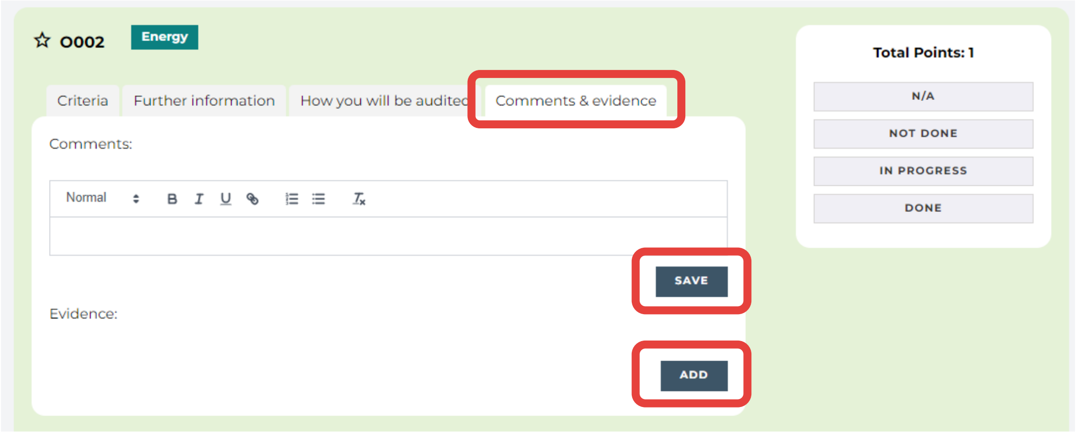
You will only accrue points for actions which have been marked as ‘Done’.

Changes automatically save.

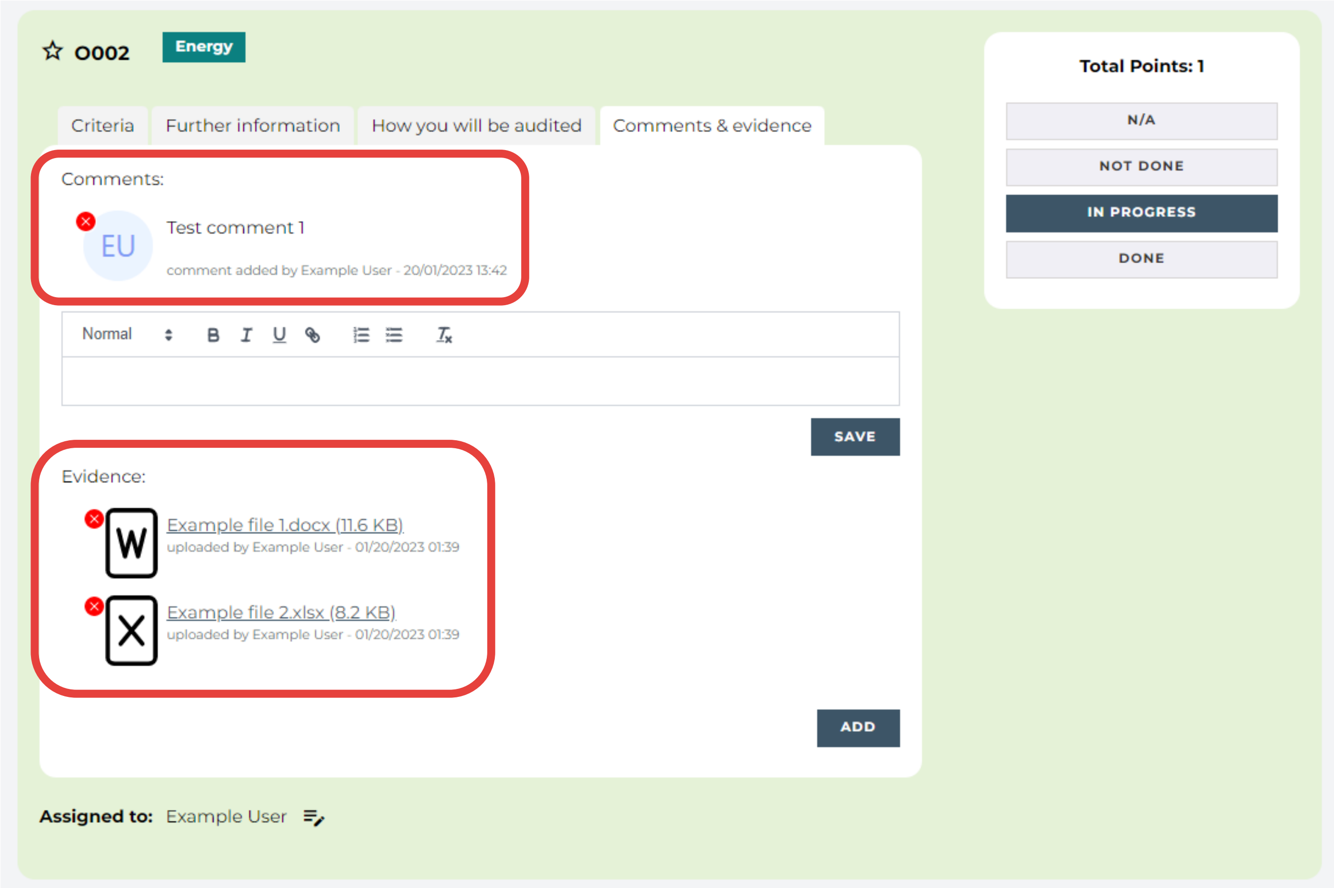
Uploading evidence and leaving comments

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.



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.

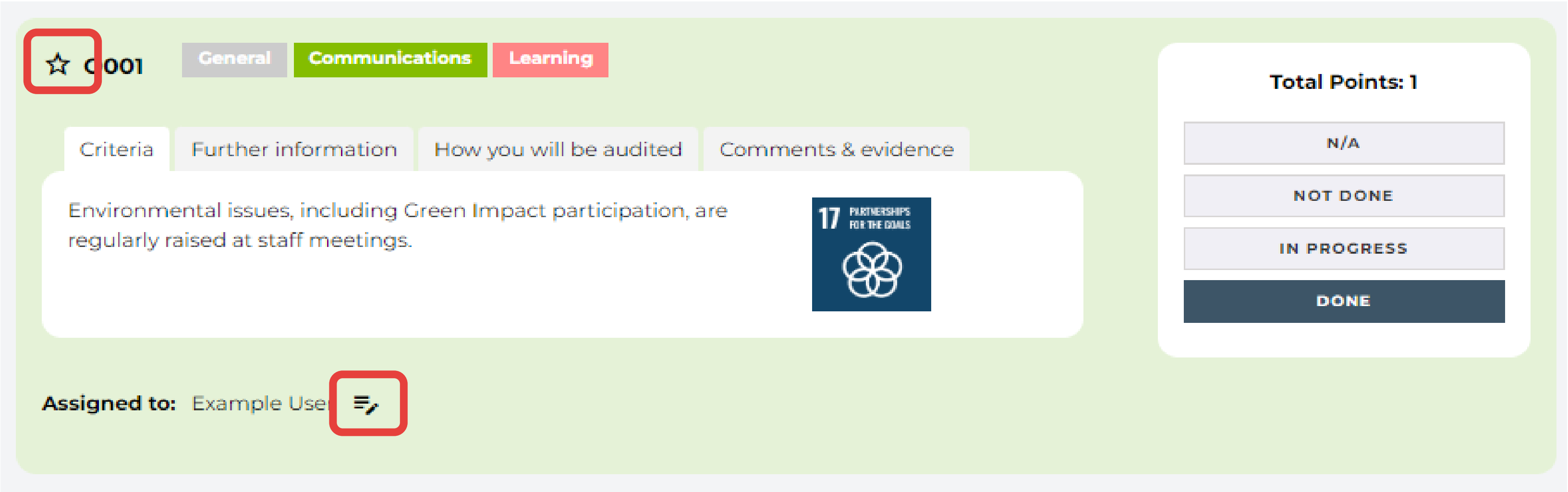
Write your comment in the text box and click ‘save’ to publish it. You can delete your comments by clicking the red x if they are no longer relevant, but you cannot edit published comments.

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

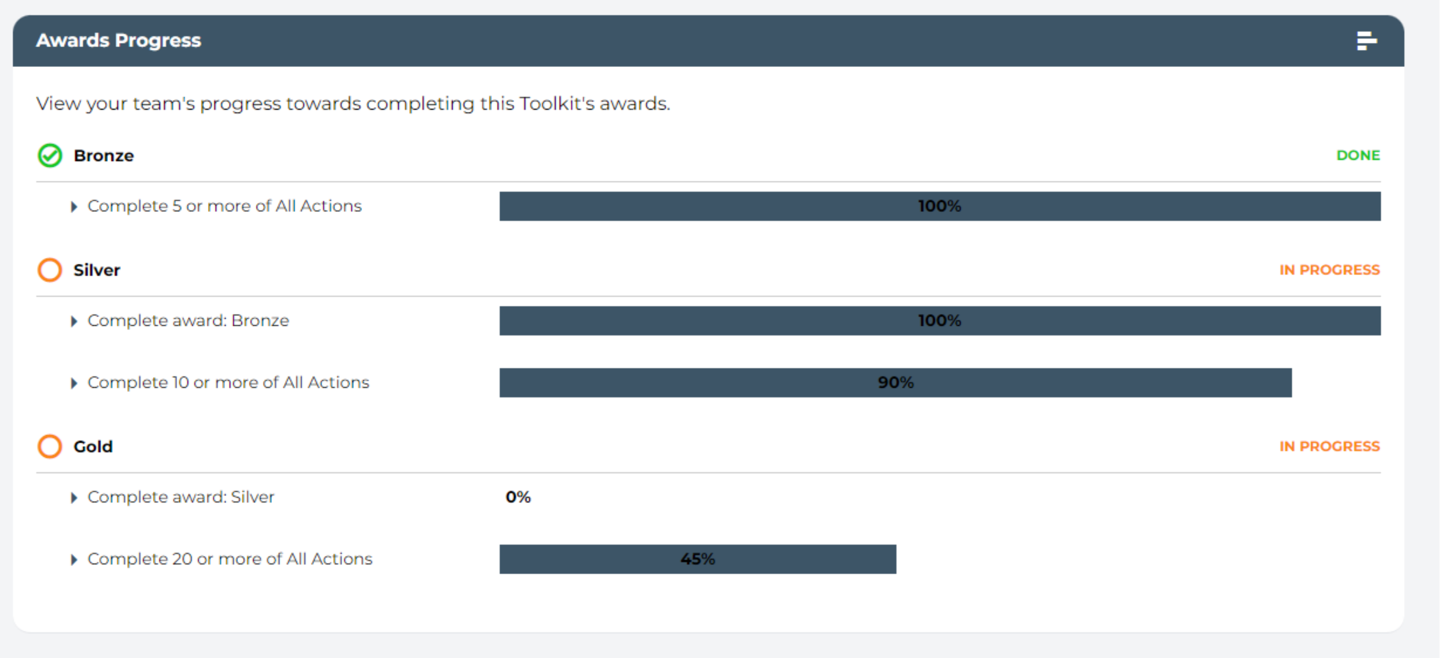
You can star actions for easy access – just click the star next to each action reference to star it, and click again to remove the star. These will then appear on your dashboard.

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.



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.

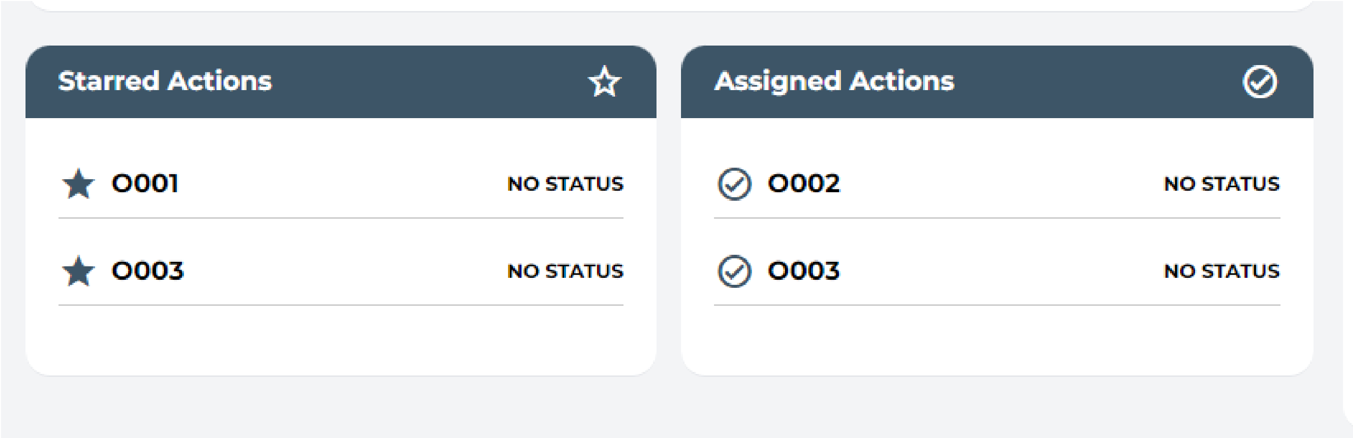


Don't forget that your final award is subject to an audit after you have submitted your toolkit. Therefore, the information on your dashboard is for **your guidance only** and may change based on the auditor's decision.

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.

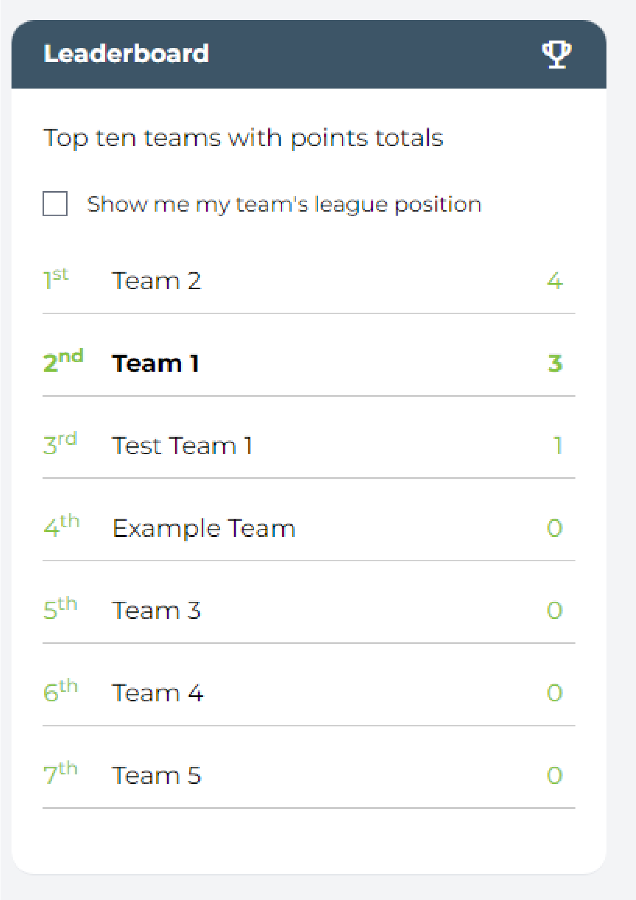


Your dashboard - leaderboard

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.

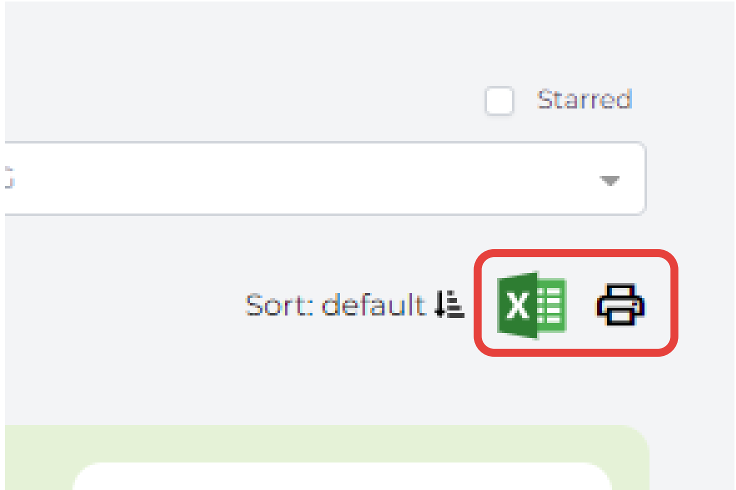
Don't worry if you aren't at the top: each team is different and the aim isn't to be 1st, but to make the biggest impact you are able to!



Printing or exporting your toolkit

To help you use the toolkit with those who 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.

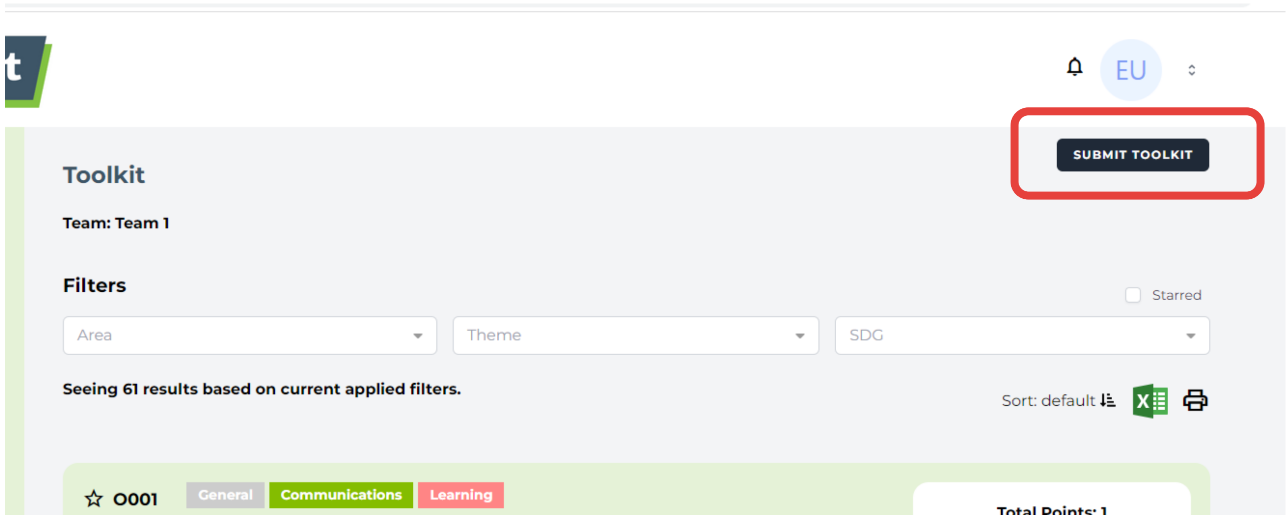


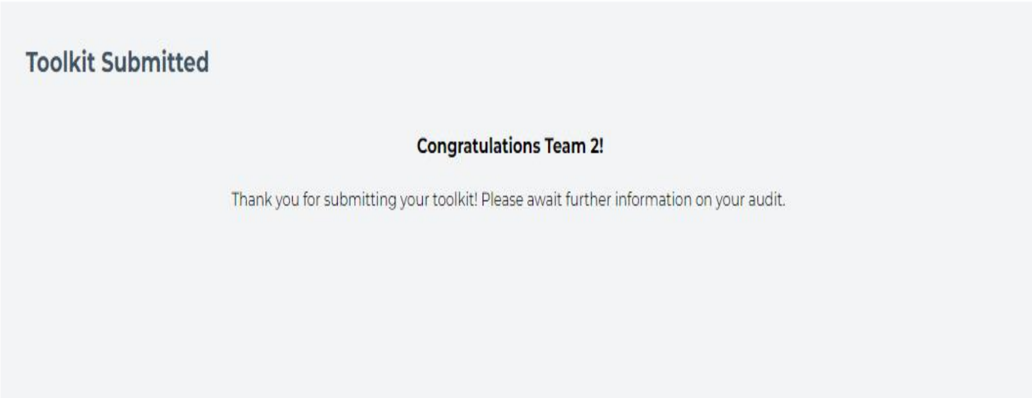
We would naturally encourage you **not to print the toolkit unnecessarily.** The excel function will help you use the toolkit without needing to print. The excel function also shows you the comments and actions completed, so is a live representation of your work at the point of download.

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!



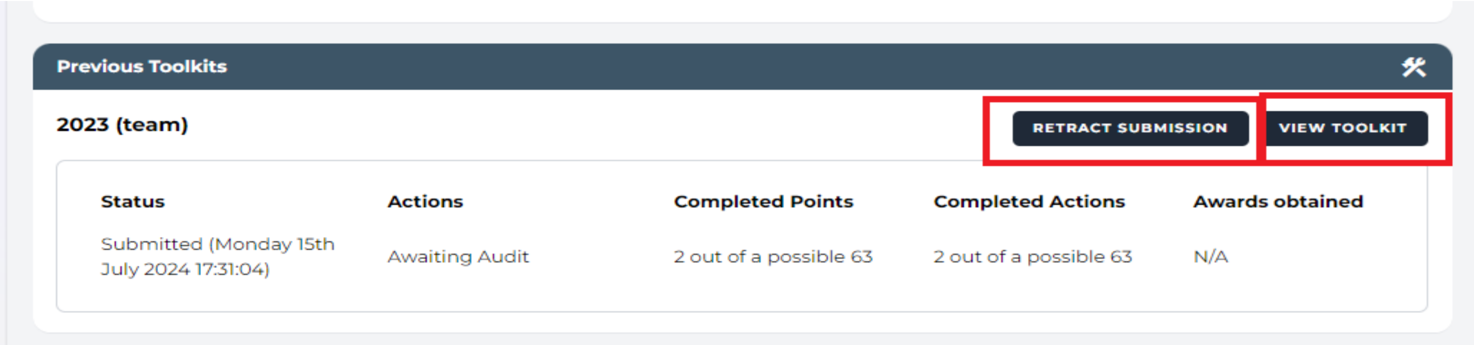


Retracting and viewing your submitted toolkits

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.



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

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