



SIGBI GUIDE

UPDATING THE SIGBI DIRECTORY OF MEMBERS AND THE SIGBI PROGRAMME DATABASE USING THE SIGBI WEBSITE

For the purpose of this document, references to Soroptimist International Great Britain and Ireland (SIGBI) Limited and Soroptimist International may be written as “SIGBI” and “SI” only.

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1 Introduction

SIGBI maintains a database of Members, to include contact details, which Club they belong to and which position(s) they hold. The same database also includes the Programme Database which contains information about projects that Clubs have undertaken to improve the lives of women and girls since 2011.

The Search Directory facility makes it possible to search the Directory and Programme Database in real time for ALL Members and Programme Reports, and the Manage Directory facility enables ALL Members to update their own contact details and enter Club Programme Reports, and Club Presidents, Secretaries and Membership Officers to update details of any Members of their Club and the Club Officer information, request an annual return to be sent to them, and also enter Club Programme Reports.

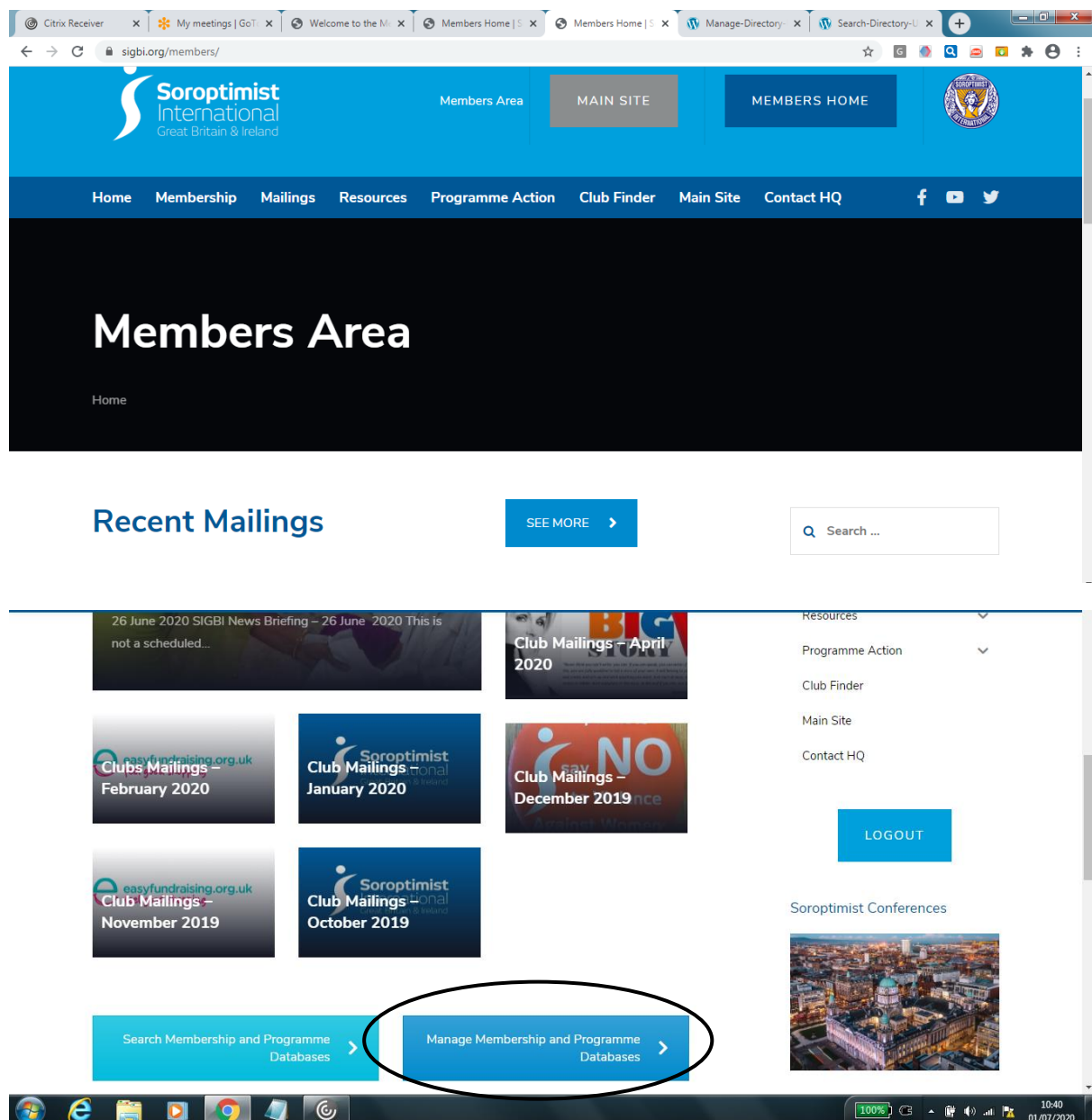
Region/NA Presidents, Secretaries and Membership Officers also have permissions to update their Region/NA Officers.

This makes it easy for Club Officers to keep track of their Membership as they can see at any one time which Members and Officers SIGBI HQ has recorded for them, and amend them if they are incorrect. It also means that there are no delays in receiving Membership Numbers for new Members, as they are displayed at the time of entering the Member's details. Similarly, ID numbers for Club Programme Reports are received straight away, and will be visible using the Search Directory facility, usually within a week of being input.

2 Logging in and Accessing Manage Directory facility

From the www.sigbi.org homepage and log in by entering your Surname and Membership Number in the boxes. Click “Log In”. The Database will detect your position in the Organisation from this login, and give you access permissions accordingly.

The Manage Directory facility is located at the bottom of the Members’ welcome page, so you need to scroll down to see it. Simply click the button to access.




3 Updating the Membership Database

3.1 All Members – Update Profile

When you log into the Members' area of the SIGBI Website, any positions that you hold are checked and you are given permissions accordingly.

All Members can view the details that SIGBI hold for them, and update their details if required. When you click the "Manage Directory" button in the LH panel, you will see the following screen (*the personal details of the Member shown below have been removed*):

 **Josie Fletcher** Membership Number: **15947**

Member Club: Sheffield

Your Personal Details:

Name: Josie Fletcher

Address:


Telephone (Daytime): **Telephone (Evening):**

Telephone (Mobile): **Fax:**

Email:

Date of Birth:

Date Joined:

[Update My Details](#) 

1. Click "Update My Details" if you need to change any of the Contact Details shown. Note you cannot change your Date of Birth or your Joining Date. If either of these are wrong then please do contact SIGBI HQ to get it amended.
2. Complete the form with the amended details – Note that the details on this form are all updated on the database, so do not delete any items that have not changed (eg telephone numbers), simply leave them as they are and when you click "Submit" the whole form will be saved.
3. Click "Submit".

Title

Mrs

Address

Contact Details

3.2 Club Presidents/Secretaries/Membership Officers

Club Presidents, Secretaries and Membership Officers can update their Club Officers and their Club Membership details. This section gives instructions for each type of transaction.

The screen displayed is similar to that for Members, with the personal profile at the top, which can be updated, but below that the office held by the Member is displayed and if they are a Club President, Secretary or Membership Officer, they can view Officers/Members.

Your Positions Held

Type	Position Held
Club Slough, Windsor and Maidenhead	Membership Officer View Officers/Members

Officers Members

Position	Name	From	To	Contact	Change holder of position	Vacant	Renew
Club Representative To Region 1	Irene Patricia Brooks	01/04/2014	31/03/2015	Contact	Change holder of position	Vacant	Renew
Club Representative To Region 2	Jean Tyler	01/04/2013	31/03/2015	Contact	Change holder of position	Vacant	Renew
Communications Officer	Jean Tyler	01/04/2014	31/03/2015	Contact	Change holder of position	Vacant	Renew
Membership Officer	Janette Margaret Jackson	01/04/2013	31/03/2015	Contact	Change holder of position	Vacant	Renew
President	Angela Leslie	01/04/2014	31/03/2015	Contact	Change holder of position	Vacant	Renew
President Elect	Pamela Bailey	01/04/2014	31/03/2015	Contact	Change holder of position	Vacant	Renew
Business Affairs Officer	Deborah Jane Brooks	01/04/2014	31/03/2015	Contact	Change holder of position	Vacant	Renew

3.2.1 Updating Club Officers

When you click “View Officers/Members” the default is the Officers. The list is in alphabetical order by position, and shows the position, the holder and the dates between which they have held the position. The last four columns are all “action” links:

Contact: this facility enables you to send an email to one of the Officers. After clicking, scroll down to see and complete the Contact form

Change holder of position: click this to be presented with a “Search” field.

Enter the surname required and then click “Search”.

A list of those Members within your Club, who match the surname, will be displayed, with the option to “Assign to Position”.

Click this link against the name required. The update will be immediate, and the dates that the position holder is in post will be displayed.

Notes:

1. The default dates are for the full current Club year. If you are changing an officer part-way through the year because the current holder has had to resign, then please contact SIGBI HQ to make the change.
2. The list of names displayed will only belong to the Club whose Officers are being updated. Therefore, even just typing a couple of letters of the surname will only bring up a small list of possible candidates.

Vacant: Simply click this to put nobody in the position for the full Club year. You will see the dates change and the current position holder will be removed.

Renew: If the same person is staying in position for another year, then simply click “Renew”. You will see the end date change, so will know that the update has taken place.

3.2.2 Updating Membership

To switch between viewing Officers and Members, use the appropriate tab as shown below:



Position	Name	From	To	Contact	Change holder of position	Vacant	Renew
Club Representative To Region 1	Irene Patricia Brooks	01/04/2014	31/03/2015	Contact	Change holder of position	Vacant	Renew

Click the Members tab to switch to view the Club's Members:

Type	Position Held	
Club Slough, Windsor and Maidenhead	Membership Officer	View Officers/Members

[Officers](#)

[Members](#)

Total number of Members: 33

Member No.	Name	Declaration				
45264	Mary Abraham	* * *	Contact Member	Edit Details	Left	Transfer
42416	Anne-Marie Adams	*	Contact Member	Edit Details	Left	Transfer
41919	Pamela Bailey	* * *	Contact Member	Edit Details	Left	Transfer
4828	Barbara Bannister	* * *	Contact Member	Edit Details	Left	Transfer
32593	Michele Bennett	*	Contact Member	Edit Details	Left	Transfer
45263	Sandra Bond	*	Contact Member	Edit Details	Left	Transfer
42470	Irene Patricia Brooks		Contact Member	Edit Details	Left	Transfer
41591	Marilyn Ann Brown		Contact Member	Edit Details	Left	Transfer
4834	Margaret Cook	* * *	Contact Member	Edit Details	Left	Transfer
4838	Estlyn Davies	*	Contact Member	Edit Details	Left	Transfer
41318	Penny Jane Dmoch	* * *	Contact Member	Edit Details	Left	Transfer

The Members are listed alphabetically by Surname. Displayed are: Membership Number: Full Name, Gift Aid Declarations (the key is shown underneath the list of names: green – Benevolent Fund, Orange – Emergency Relief Fund, Yellow – Diamond Education Grant), followed by four linked options:

Contact Member: Click this to send an email to a Member (scroll down to see the Contact form)

Edit Details: Click this to display the contact details held for a Member and to update them (scroll down to see the form)




Left: Click this if the Member has left your Club

Note: you need to enter a leaving date – if you are updating your Membership before requesting a new Annual Return, ALWAYS use a leaving date on or before 31/3 of the current year (eg 31/3/2015). If you put a date after March the Annual Return will not include that this member has left.

Transfer: Click this to send a “Transfer Request” to SIGBI HQ. You cannot directly transfer a Member because SIGBI HQ need to verify with the destination Club that they know about this Transfer. As soon as SIGBI HQ have received confirmation from the new Club they will make the transfer and let you know.

Note: The transfer request can only be sent by the Club the member is LEAVING, as she currently appears in the Membership List for that Club.

At the bottom of your list of members are two buttons: Add New Member and Request Annual Return:

Key:  Benevolent Fund  Emergency Relief  Diamond Education Fund

Add New Member

Request Annual Return

Click the Add New Member button to add a new Member. The Membership Form will be displayed, that you need to complete.

Add a new member

Mrs

Address

Gift Aid

Benevolent Fund Diamond Education Grant Emergency Relief Fund

Contact Details

Note: The information that is to be entered in each box is inside the box and will disappear when you click in the box. Note what information is required before clicking in each box.

Any New Members with a joining date of after 31 March of the current year, will not appear on your Annual Return, so please remember to include their fees when sending payment to SIGBI HQ..

Click "Submit" after completing the form. You will be given the membership number straight away on the screen. Please make a note of it, as it will not be sent separately by email.

If there are fees to be paid for this new Member, SIGBI HQ will email you advising you of the amount now payable.

3.2.3 Requesting an Annual Return

If you have made several changes to your Membership and would like to receive an updated Annual Return then click the “Request Annual Return” button.

This will change to “Requested”.

The Annual Return will be generated by the database, and will be sent to the Club Secretary and Club Treasurer.

4 Programme Database – adding reports

Under “Manage Membership and Programme Directories”, all Members will see two buttons: “Add Programme Report” and “Manage Saved Programmes” as shown below:



Click the “Add Programme Report” button, and the Project Capture Wizard will be displayed. There are five short steps to completing your form, as described below. Note that mandatory fields are marked with an asterisk (*). If you attempt to move to the next Step and these fields have not been completed you will be advised which mandatory fields have not been completed.

Step 1 – Project Information

idshire.sigbi.org/project-wizard

1. Project Information...

1. **Scope***
Please select

Please check the following box if you are inputting a report on behalf of the region/National Association/Country.

2. **Name***
Jackie Mosedale

3. **Club***
Yeovil, Sherborne and Districts

4. **Region / NA / Country**
South West and Channel Islands

5. **Email***
jackiemosedale@gmail.com

6. **Project Title***
Give your Project a Title - include the name of the Charity supported if applicable

7. **Start Date** 8. **End Date (if applicable)**
Enter Start Date Enter End Date

9. **Country in which the project took place**
Enter Project Location

10. **Did you have an outside Organisation as a partner on this Project?**
Only identify organisations you worked actively with on this project, not ones to which you made a donation. Please enter the name of the Organisation below.
Enter Organisation Name

No Partner

11. **Did you work with a Friendship Link on this Project?**
Please select the Friendship Link that you worked with from the list below.
Please Select

NEXT

1.Scope – Select here whether your project is a Club Project, Region/NA/ Network Project, Country Project or Federation Project. Anything where you send a cheque to SIGBI HQ is a Federation Project (even the International President’s Appeal).

NB: If you are completing the report on behalf of the Region/NA/Country, ticked the box just below the Scope field. This will remove your Club information, so that the report is only displayed during a search for Region/NA/Country reports.

2, 3, 4, 5 – these fields are all pre-populated with your details as held on the SIGBI Membership Database. They cannot be amended here. If your email address is wrong, then return to your Profile under Manage Directory and correct it before carrying on with entering your project.

6. Project Title – Give your report a meaningful title. Include the charity name (if applicable) in the title.

7 & 8 – Select a **start date** for the Project and, if applicable, an **end date**. If there is no end date it is assumed the project is ongoing.

9. Country in which the project took place – Do you know in which country the lives of women and girls was improved? For example, for the Meru Women’s Garden Project you should enter “Kenya” in this box, and for the International President’s Appeal 2015=2017 “Nepal” should be entered. For local projects put your own country.

10. Did you have an outside Organisation as a Partner on this Project? – Simply enter the name of the Partner Organisation in this box if applicable. Only include Organisations with whom you collaborated on the project, not just ones to whom you made a donation.

11. Did you work with a Friendship Link on this Project? – This time select the name of the Club from the list displayed. Only your Club’s Friendship Links will be displayed, and only one Club can be selected.

Click “Next” to advance to Step 2.

Step 2 – The Story of your Project

midshire.sigbi.org/project-wizard

2. The story of your project...

Your project should demonstrate how the lives of women and girls have been improved through **education, empowerment and enabling** opportunities. Use these words where possible in the write up below.
Please do not include any personal details of any members within the body of your report.

12. Please enter a concise summary of your project below, so that it could be used in publicity material.*

500 characters remaining.

13. Why did your Club/Region/NA/Network choose this project? What issue did you tackle with this project?*

700 characters remaining.

15. What was the result of this project?*

700 characters remaining.

BACK NEXT

Save For Later Delete

We want to know the Story of your Project. Don’t just tell us of one event that you held to fundraise. Tell us what led you to do the project in the first place (13), the processes involved in supporting the project including events held (14), and the results of the project – how did it improve the lives of women and girls? (15).

Particularly important, put a descriptive summary of the entire project in number 12. This summary should be able to be used in its entirety in publicity material, such as Soroptimist News.

You can use 500 characters for the summary, and 750 characters for each of the other three fields. A counter will show you how many characters you have left.

Click “Next” to advance to Step 4.

From Step 2 onwards you can “Save your Report for Later”.

If you click “Save for Later” after completing each Step, then you will be assured of being able to retrieve the report later if you do not “Submit” it. If you do not click “Save for Later” and you are timed out of the database, you will NOT be able to retrieve your report later.

Delete will permanently delete your report from the system.

Step 3 – Programme Focus

16. Please select the Programme Focus which best describes what your project was above and then click "Add Options".

- People
- Prosperity
- Planet
- Peace
- Partnerships

Your Choices

17. Please tick which of the 3E's and 3A's below apply to your project:

- Educate - To impart knowledge or skill;
- Enable - To make possible
- Empower - To give power to
- Awareness - Knowledge of...
- Advocacy - Plead in support of...
- Action - To take active steps...

BACK NEXT Save For Later Delete

When you first go to Step 3, you will just see the 5 Ps (People, Prosperity, Planet, Peace, Partnerships), plus the 3 E's (Educate, Enable, Empower) and the 3 A's (Awareness, Advocacy, Action).

You need to select the P that your projects best fits under. This will then show you the SDGs (Sustainable Development Goals) that fit under that P, and you must select at least one of these, but you can select as many as you like.

16. Please select the Programme Focus which best describes what your project was above and then click "Add Options".

- People
- Prosperity
- Planet
- Peace
- Partnerships

	1 NO POVERTY End poverty in all its forms everywhere	<input type="checkbox"/>
	2 ZERO HUNGER End hunger, achieve food security and improved nutrition and promote sustainable agriculture	<input type="checkbox"/>
	3 GOOD HEALTH AND WELL-BEING Ensure healthy lives and promote well-being for all at all ages	<input type="checkbox"/>
	4 QUALITY EDUCATION Ensure inclusive and equitable quality education and promote lifelong learning opportunities for all	<input type="checkbox"/>
	5 GENDER EQUALITY Achieve gender equality and empower all women and girls	<input type="checkbox"/>

After your selection(s) you must click "Add Options" to add the choices to your report. The top SDG will be shown as the "Primary SDG", which means it will be used in searches and reports, but you can select another Primary SDG if preferred. Simply tick the box of another SDG to select it as the Primary SDG.

You can also select another P and choose more SDGs if required after adding the first options.

You must also select at least one E and one A before you can move to the next step. You can select more than one of each.

Click "Next" to advance to Step 3.

Step 4 – Project Results

idshire.sigbi.org/project-wizard

4. Project Results...

18. Our project's main target were:

Women / Girls Children Community

19. How many people benefitted from your project in total?
If you know the actual number of Women and Girls helped enter the number in the box on the right, otherwise tick Number Not Known.

Number not known

20. How much did you raise?

£ 0.00

21. Please give a direct quote from a beneficiary below. If possible
We may use quotes on recruitment leaflets and other publicity items.

700 characters remaining

22. Is this Project a continuation of a previous Project? Please select any other projects that are linked to this one, from the drop down list of projects previously input by your Club/Region/NA/Network. You can select more than one linked Project

18. Select a linked Project – clicking on the down arrow to the side of this box will display a list of Projects that your Club has input previously. Select one or more Projects and click “Add” after each selection.

Step 5 – Supporting Materials

idshire.sigbi.org/project-wizard

5. Supporting Materials...

23. Add Images

Do you have any pictures of the project that you wish to share? You can upload up to 6 JPEGs, up to 5Mb each.
Give the image a descriptive title that will appear in this Programme Report, and then "Choose file" to locate the image on your PC and upload it.

No file chosen

24. Add a PDF file:

Is there a report of your project that you would like to share, which gives more information? You can upload it in PDF format, and it must be less than 5Mb.
Give the report a descriptive title that will appear in this Programme Report, and then "Choose file" to locate the report on your PC and upload it.

No file chosen

24. Add a YouTube Url

This is where we need to see the facts and figures:

15. Who was the main target? – Women/Girls, Children (Girls/Boys) or Community (includes Men/Boys)

16. How many people benefitted? If you know how many people benefitted then put the number in the field which says “State Exact Figure”. If not, then tick the “Number not known” box.

17. How much did you raise? This is defaulted to £0.00. You can leave it as this figure, or enter a figure if funds were raised as a result of your Project. Do not put a comma when the amount is £1,000 or more.

Click “Next” to advance to Step 5.

Add any photographs (images) you have of the project or if you want to include more information about the Project upload a PDF.

For 23 – Add Images click “Choose File” and browse your computer for the image, which MUST be in JPEG format. No other formats can be uploaded

You MUST give your picture a title (make it descriptive of what is in the image) and click “Save this image to Report” as if this is not clicked the image will not be uploaded.

For 24 – Add a PDF File click “Choose File and browse your computer for the PDF (Word documents cannot be uploaded). Click “Upload File” to save the PDF to your report.

You can upload up to six images and one PDF.

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If there is a YouTube video that you want to include, you can put the link in the report where indicated. Click the “Save the Link to Report”, in order to ensure it is included.

Click “Submit” to send your report to be approved. An email will be sent to you saying that your report has been submitted and giving the report number.

After the report has been submitted

The report will come through to SIGBI HQ for approval. It will be approved as soon as possible by SIGBI HQ.

When the report has been approved you will receive an email to say that it has been approved and can now be searched for within Search Directory. Details of how to do this are in the “Search Directory User Guide”.

If further information is required before your report can be approved, you will receive an email requesting this information. Please respond to sally@sigbi.org as soon as possible so that your report can be approved. You will then receive the email saying that your report has been approved.

If there are particular deadlines looming (eg your Regional PAO will be completing her quarterly report or you want your report to be considered for a Programme Award – deadline 31 July each year) then do allow plenty of time for approval.

5 Programme Database – Retrieving or Deleting Saved Reports

When you first click “Manage Directory”, instead of clicking “Add Programme Report” click “Manage Programmes”.

If you have any projects that have been saved but not submitted, they will be displayed as shown below:

Manage Projects

Project ID	Project Title	Report Date		
42975	Meru Women's Garden Project	14/10/2016 13:23:27	Edit	Delete

[<< Back to Manage Profile](#)

If you click “Edit” then the report will open with the familiar template, but will say “Editing Report (Project ID)” at the top. You can then make alterations to it and Submit it when it is complete.

You can also delete a report if you have changed your mind about submitting it. This will stop the list from becoming cumbersome.

Note: this facility went live in October 2016, and only reports that have been “Saved for Later” will be available in this list. Any reports started prior to this but which were not “Submitted” are non-retrievable.

Once a report has been “Submitted” it cannot be amended by Users of the system. If you have a change to make to a report, please send it together with the Project ID to Sally Higgins – sally@sigbi.org – who will update it for you.