

Activités de service - Création, Rapport, Copie



Lion Portal

Une activité de réunion

Ce guide est essentiel pour toute personne cherchant à gérer efficacement les activités au sein du Lion Portal. Il fournit des instructions détaillées sur la création, le reporting et la copie des activités de service, en particulier pour les réunions, qui ont désormais leurs propres indicateurs de performance. En suivant ce guide, les utilisateurs peuvent simplifier leur processus, assurer une saisie de données précise et un suivi efficace des efforts des bénévoles. Les conseils fournis améliorent également la convivialité, facilitant la navigation et la gestion efficace des activités.



Astuce ! Les activités de réunion ont maintenant leur propre classification pour les rapports. Les indicateurs de performance pour ce type d'activités sont regroupés sous Réunions.

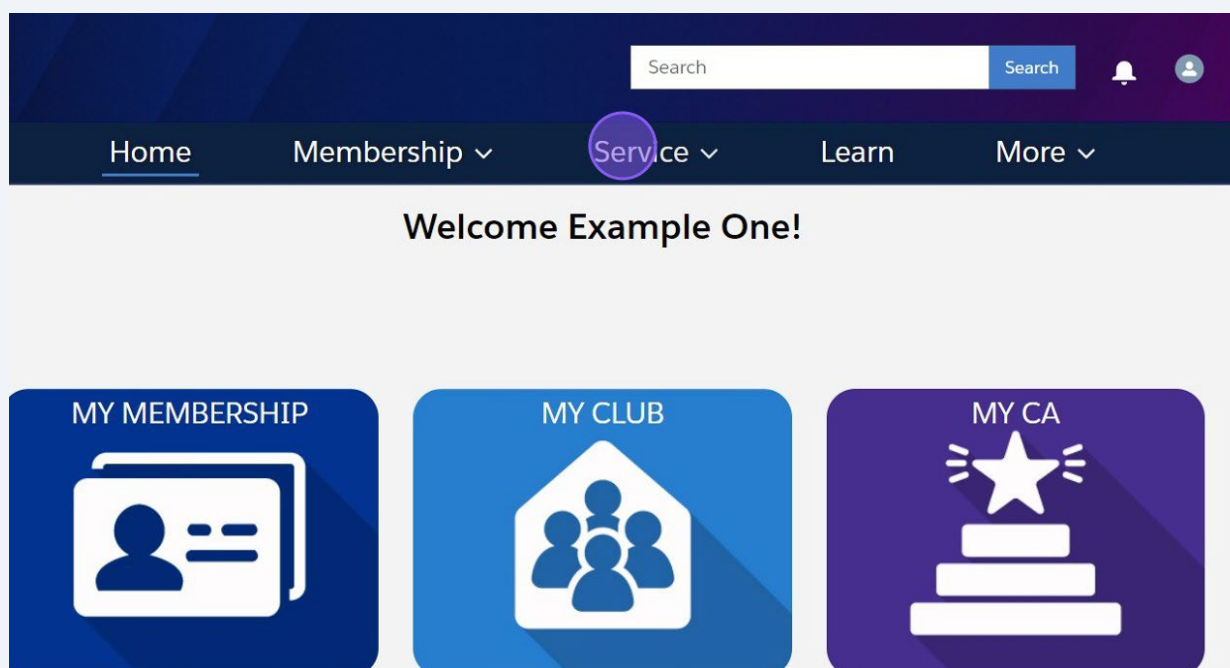
Ce guide couvre la création, le reporting, la copie et le reporting de la nouvelle activité pour le type d'activité Réunion.

1

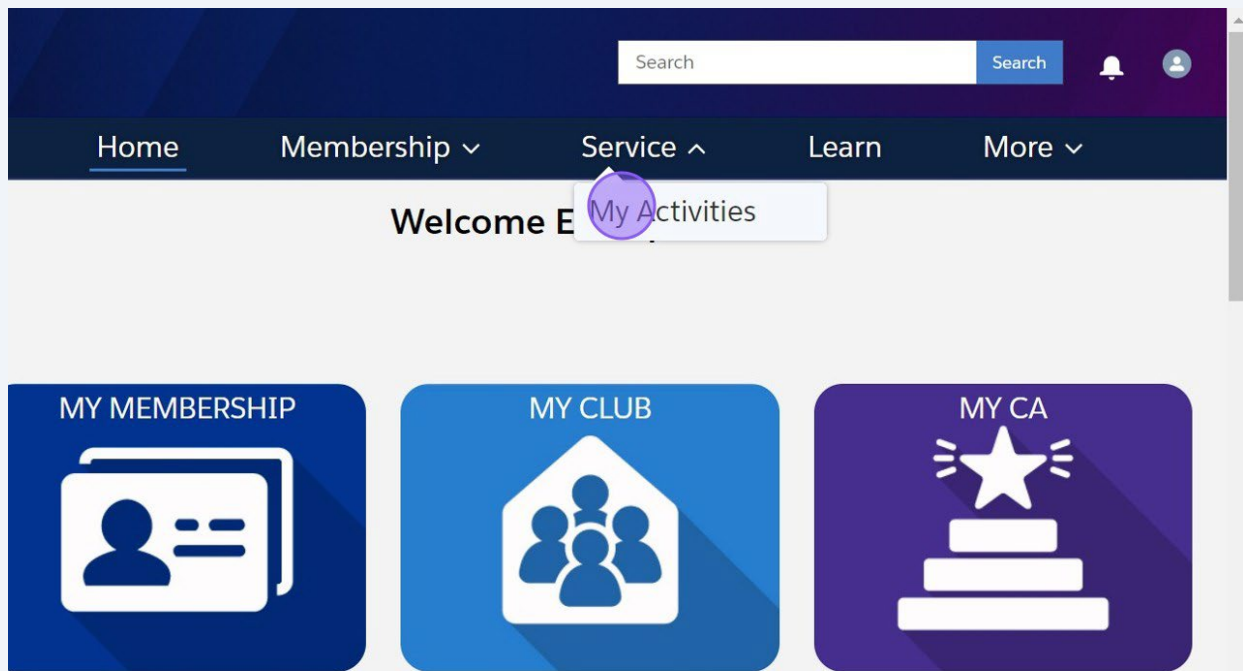
Se connecter au Lion Portal. lionportal.org

2

Cliquer sur Service

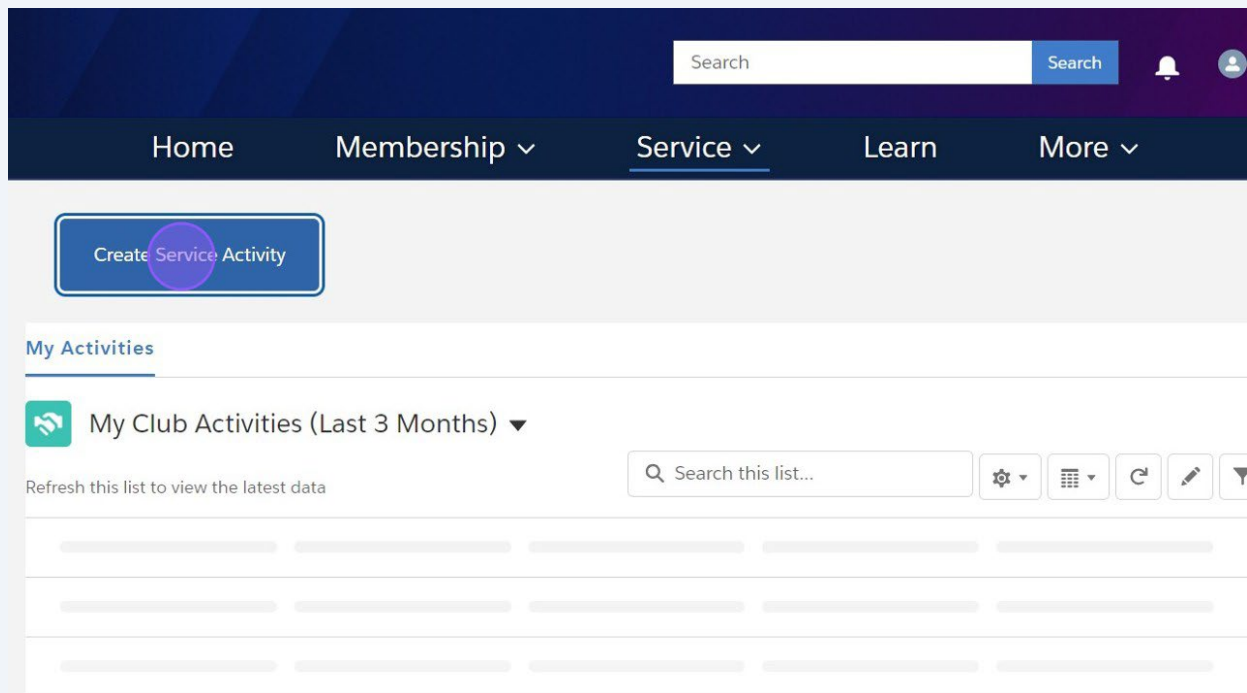


3 Cliquer sur « Mes activités »



Créer une activité de service

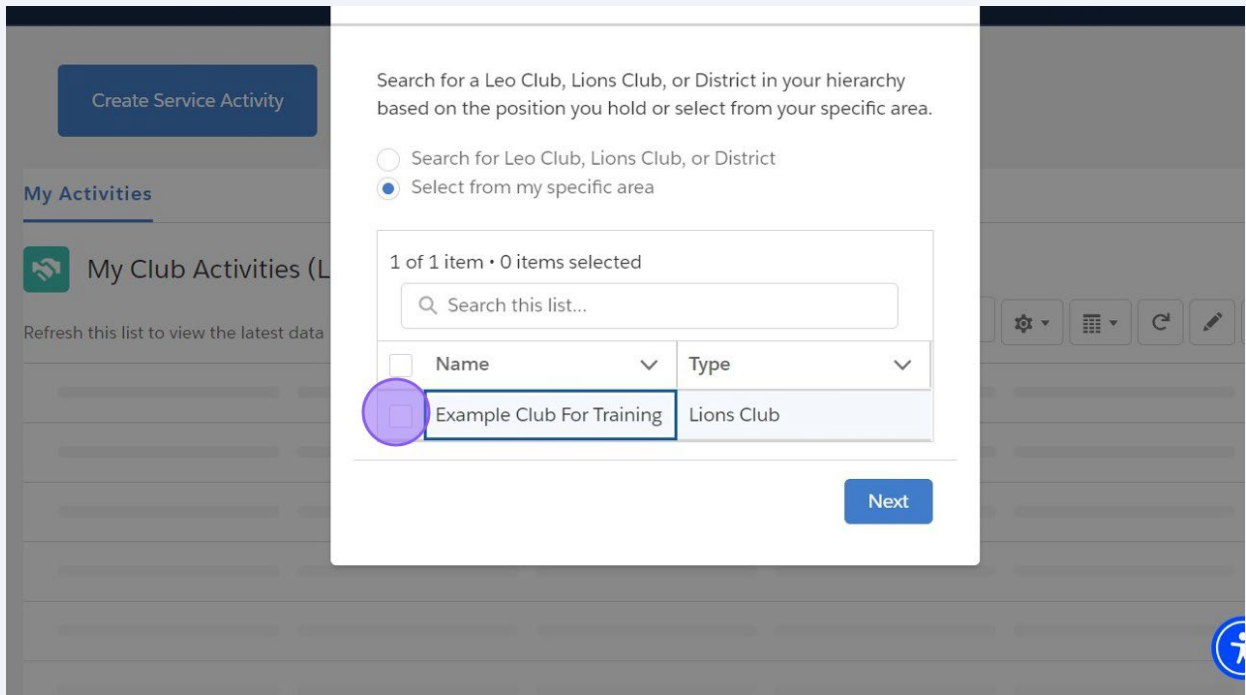
4 Cliquer sur « Créer des activités de service »



Astuce ! Les options s'affichent pour accéder à d'autres Leos, Lions ou districts pour lesquels vous disposez peut-être également des autorisations de gestion de leurs activités de service.

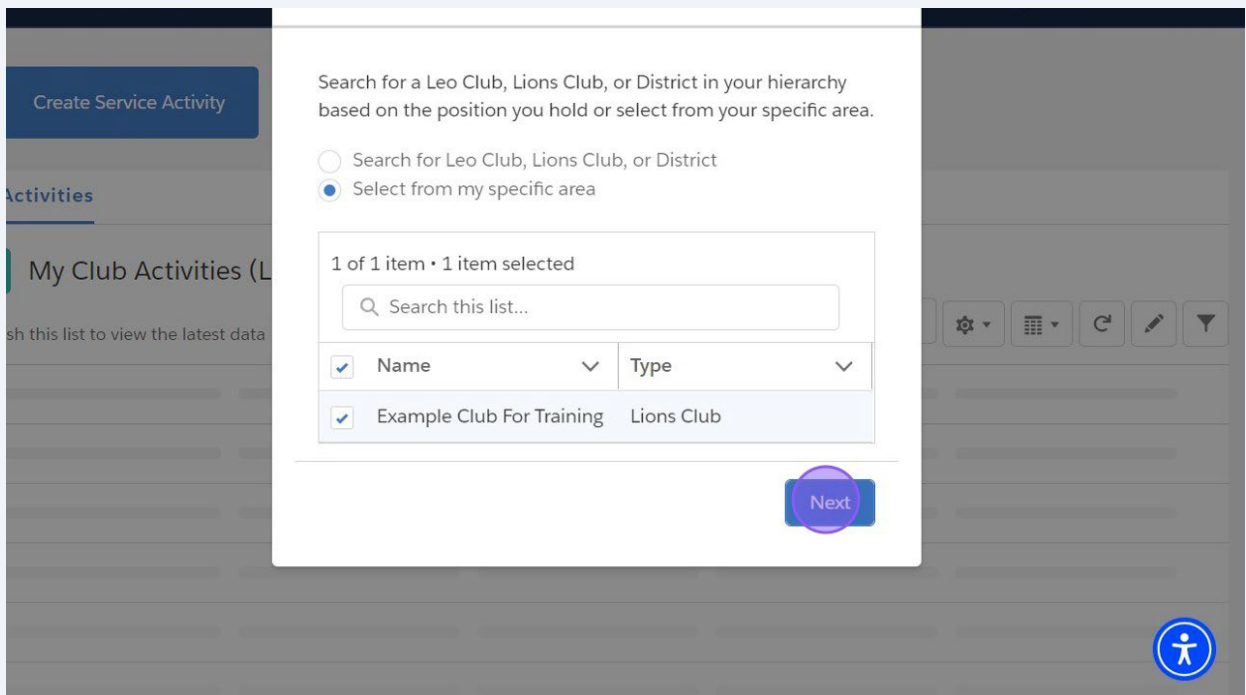
5

Pour créer une activité de service pour votre club, cliquer sur le bouton à côté du nom de votre club.




6

Cliquer sur « Suivant ».

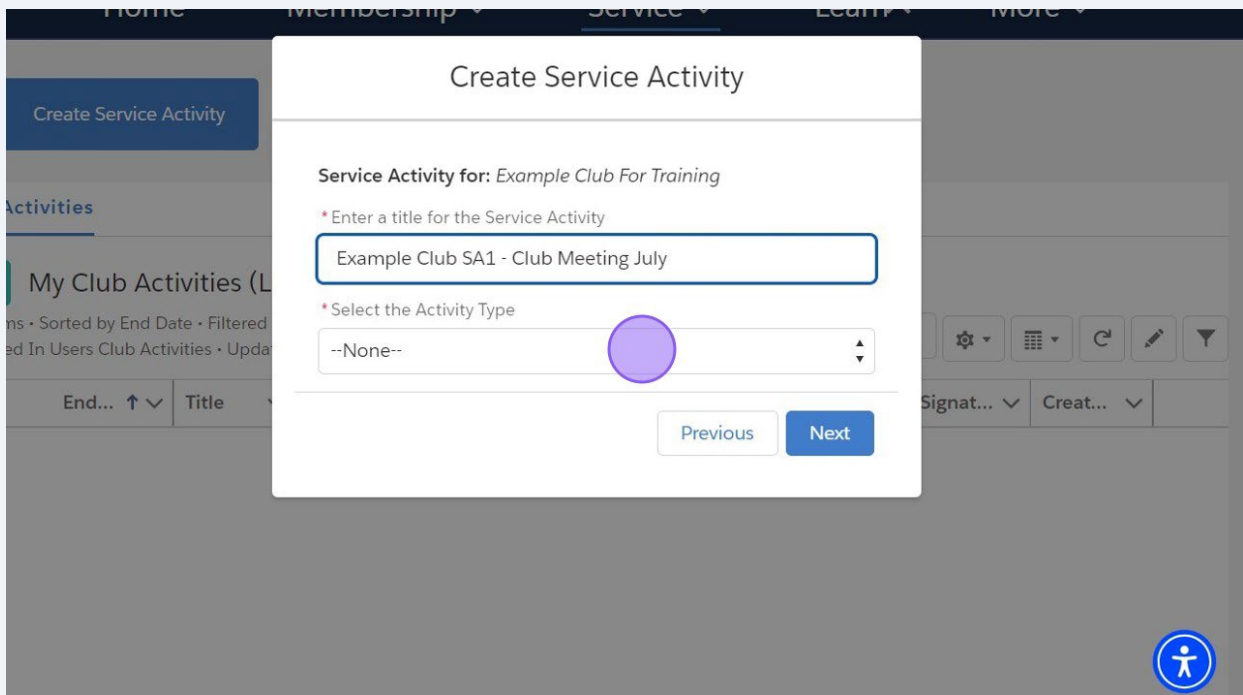


7 Donner un titre à cette activité de service

 Astuce ! Chaque type d'activités de service a des champs de données obligatoires différents. Les types d'activités de service sont :

- Activité de service
- Collecte de fonds
- Dons
- Réunion

8 Cliquer sur ce menu déroulant. Choisir le type d'activité de service



Home Membership Service Learn More

Create Service Activity

Activities

My Club Activities (L...
ns • Sorted by End Date • Filtered
ed In Users Club Activities • Upda

End... ↑ Title

Signal... Creat...

Create Service Activity

Service Activity for: Example Club For Training


* Enter a title for the Service Activity

Example Club SA1 - Club Meeting July

* Select the Activity Type

--None--

Previous Next



9

Exemple d'activités de service de type de réunion : cliquer sur Suivant

Create Service Activity

Service Activity for: *Example Club For Training*

* Enter a title for the Service Activity

Example Club SA1 - Club Meeting July

* Select the Activity Type

Meeting

Previous Next

1

Une nouvelle Activité de service est créée. Pour commencer à modifier l'activité, cliquer sur l'icône Crayon ou sur le bouton Modifier en haut à droite.

Service Activity SA-05292416

Edit Copy Delete

Title: Example Club SA1 - Club Meeting July

Sponsor: [Example Club For Training](#)

Status: Draft

Details Image Gallery

Information

Record Type: Meeting

Report Complete

Title: Example Club SA1 - Club Meeting July

Sponsor: [Example Club For Training](#)

Cause: Administration

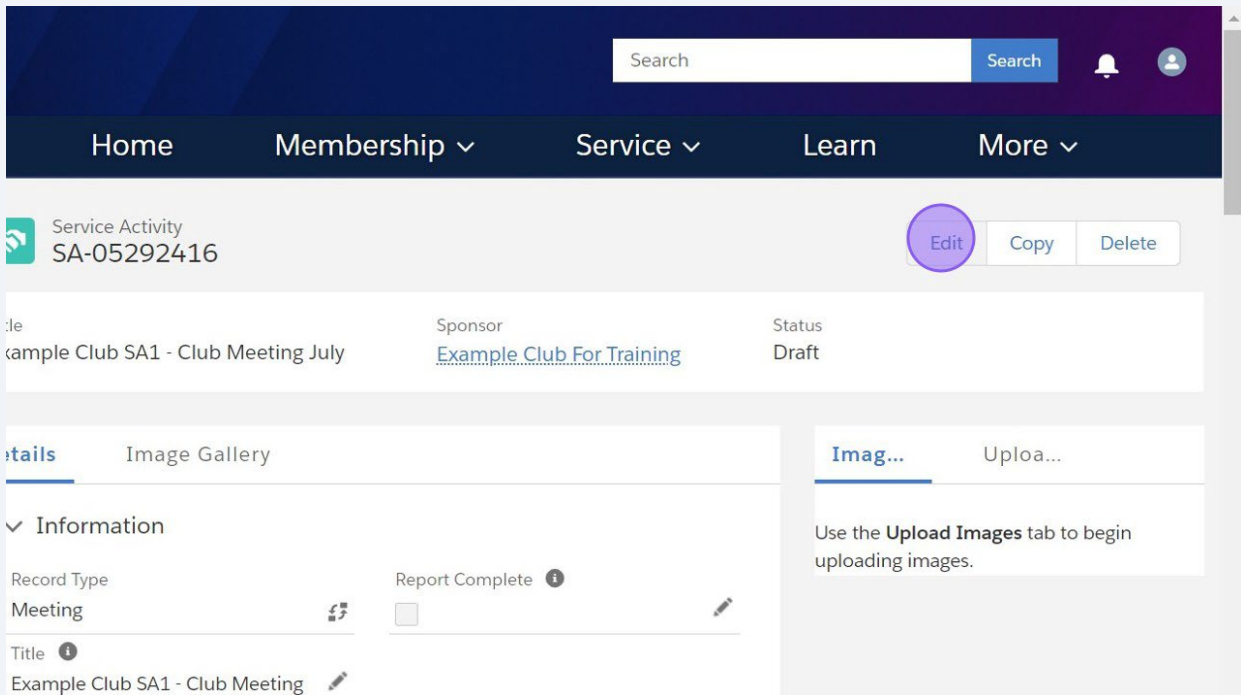
Activity Level

Image Gallery

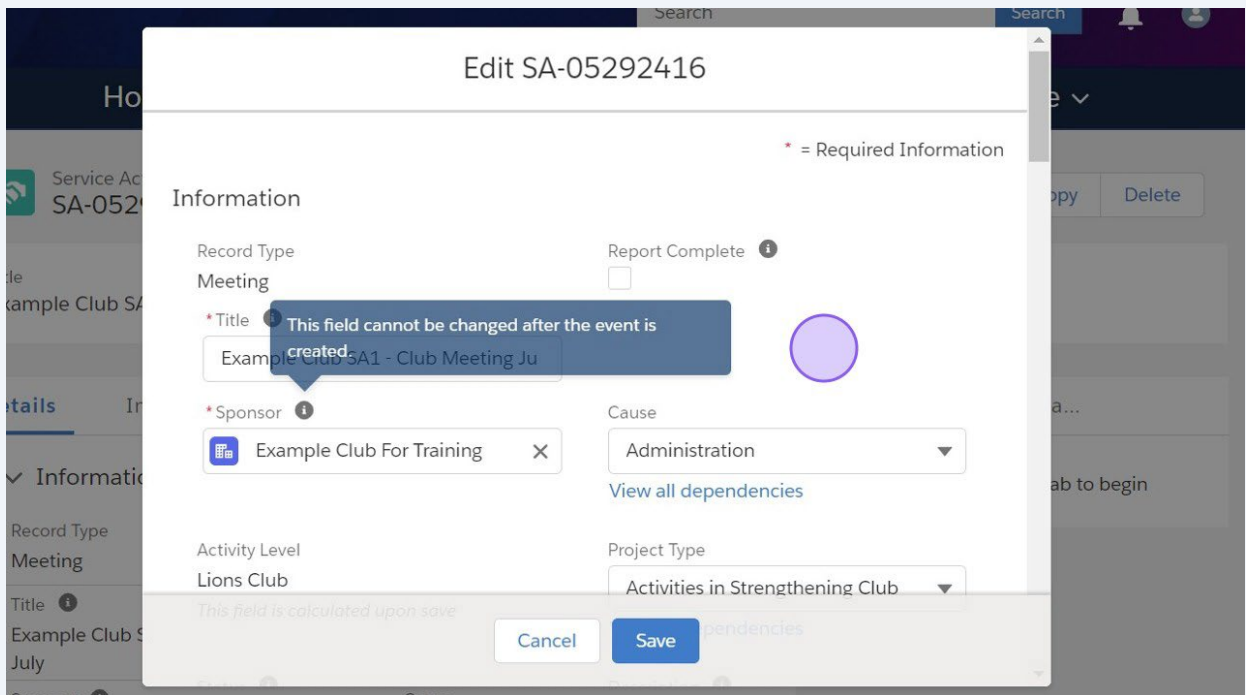
Upload Images

Use the Upload Images tab to begin uploading images.

11 En cliquant sur « Modifier », une nouvelle fenêtre contextuelle s'ouvre



12 Pour saisir/mettre à jour les données, cliquer sur les champs ou utiliser la touche Onglet



13 Faire défiler le formulaire

The screenshot shows a mobile application interface with a scrollable form. The form contains the following fields and values:

- Record Type: Meeting
- * Title: Example Club SA1 - Club Meeting Ju
- * Sponsor: Example Club For Training
- Cause: Administration
- Activity Level: Lions Club (Note: This field is calculated upon save)
- Project Type: Activities in Strengthening Club
- Status: Draft (Note: This field is calculated upon save)
- Description: (Empty text box)

Buttons for 'Cancel' and 'Save' are visible at the bottom of the form. A purple circle highlights the 'Description' field.

14 Activités de service requiert une description Cliquer sur le champ Description pour saisir les données.

The screenshot shows the same mobile application interface, but the 'Description' field is now highlighted with a blue border and a purple circle, indicating it is the active field for data entry. The form contains the following fields and values:

- * Sponsor: Example Club For Training
- Cause: Administration
- Activity Level: Lions Club (Note: This field is calculated upon save)
- Project Type: Activities in Strengthening Club
- Status: Draft (Note: This field is calculated upon save)
- Description: (Active text box)
- * Start Date: (Empty date field)
- Created By: Example One, 9/15/2024, 6:21 PM

Buttons for 'Cancel' and 'Save' are visible at the bottom of the form.

15 Cliquer sur le champ « Date de début ». Saisir la date au format JJ/MM/AAAA

The screenshot shows a form editor for a project. The 'Start Date' field is highlighted with a purple circle. The form contains the following fields:

- Activity Level: Lions Club (This field is calculated upon save)
- Status: Draft (This field is calculated upon save)
- *Start Date: (This field is highlighted with a purple circle)
- End Date: (This field is empty)
- Project Type: Activities in Strengthening Club
- Description: Records the description of the activity
- Created By: Example One, 9/15/2024, 6:21 PM

Buttons: Cancel, Save

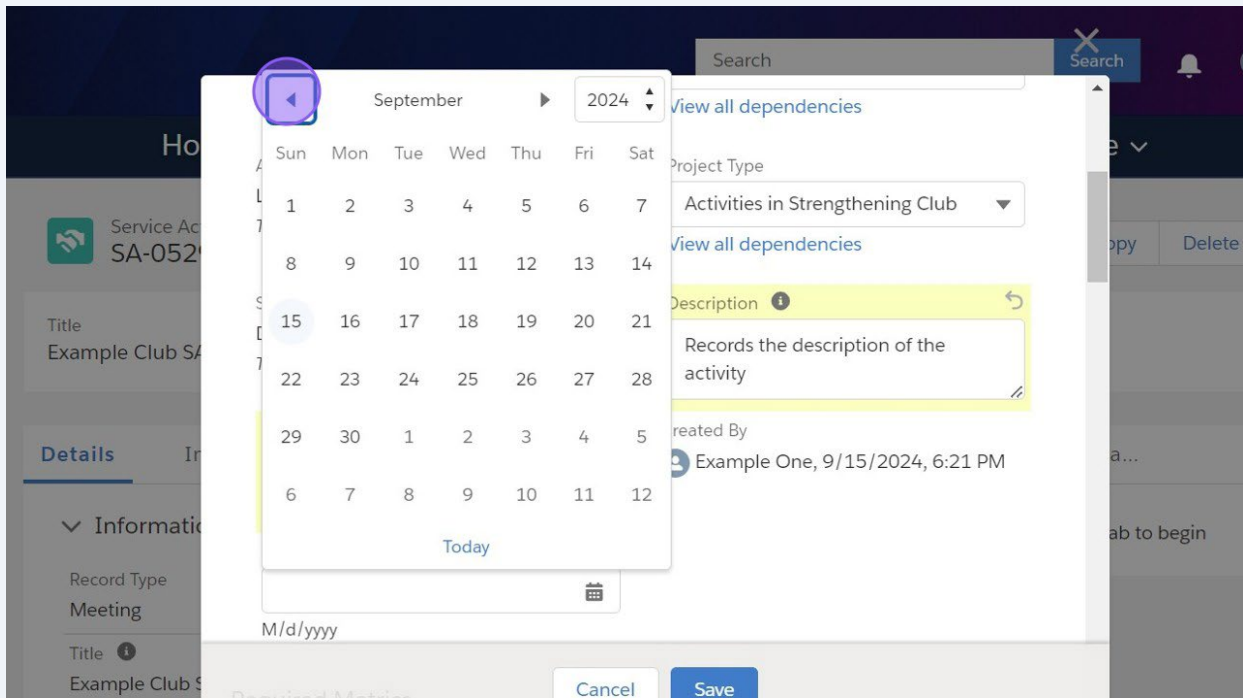
16 Cliquer sur le champ Date de fin.

The screenshot shows the same form editor as in step 15, but now the 'End Date' field is highlighted with a purple circle. The 'Start Date' field now contains the value '7/5/2024'.

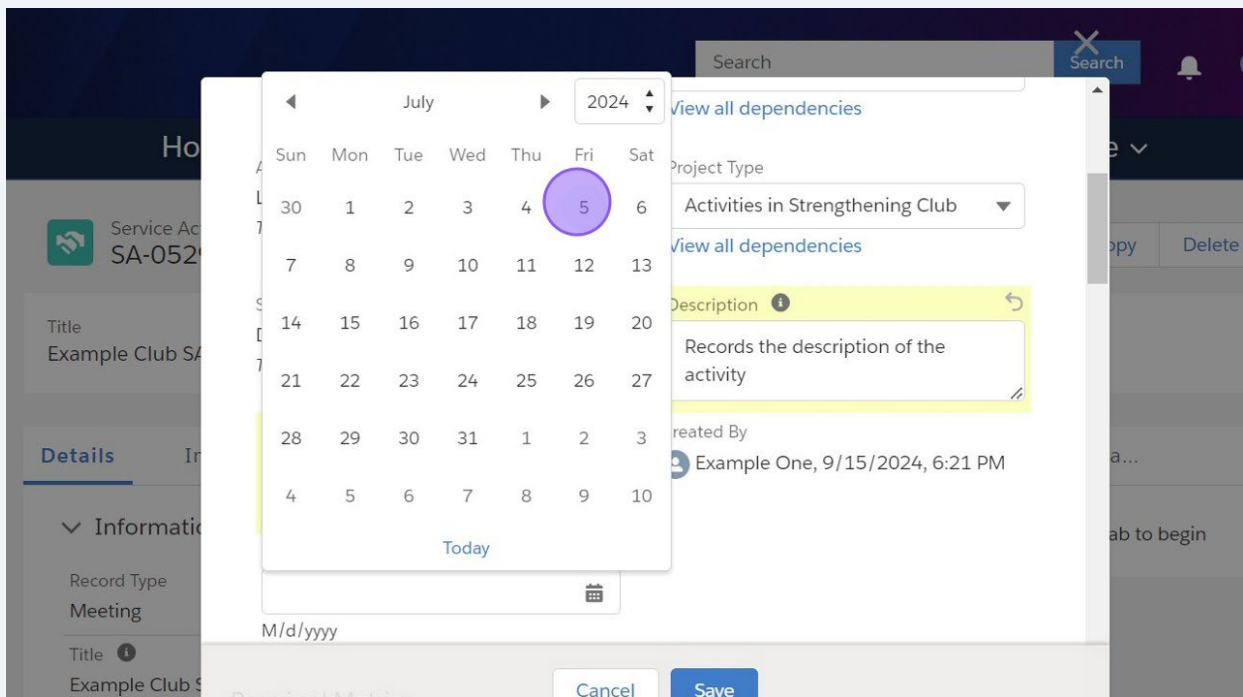
- Activity Level: Lions Club (This field is calculated upon save)
- Status: Draft (This field is calculated upon save)
- *Start Date: 7/5/2024
- End Date: (This field is highlighted with a purple circle)
- Project Type: Activities in Strengthening Club
- Description: Records the description of the activity
- Created By: Example One, 9/15/2024, 6:21 PM

Buttons: Cancel, Save

17 Cliquer sur l'icône Calendrier pour sélectionner une date dans un calendrier



18 cliquer sur la date



19 Cliquer sur le champ Total de bénévoles pour saisir les données

End Date ⓘ
7/5/2024

M/d/yyyy

Required Metrics

Total Volunteers ⓘ

Non-Lions Participated ⓘ

Non-Lion Family Members Participated ⓘ

Total Volunteer Hours ⓘ

Optional Metrics

Cancel Save

2 Cliquer sur le champ Total d'heures par Bénévole pour saisir les heures.
Champ de données obligatoire

Required Metrics

Total Volunteers ⓘ

30

Non-Lions Participated ⓘ

Non-Lion Family Members Participated ⓘ

Total Volunteer Hours ⓘ

Optional Metrics

People Served ⓘ

Currency
USD - U.S. Dollar

Cancel Save



Astuce !

Total des fonds donnés est requis pour un type d'activité de service « Don » Total des fonds collectés est requis pour un type d'activités de service « Collecte de fonds »

Les fonds peuvent être saisis en devise locale en sélectionnant Devise et en changeant le type de devise.

21

En faisant défiler la page, d'autres indicateurs s'affichent.

The screenshot shows a mobile application interface with a form overlay. The form contains the following fields:

- A text input field at the top.
- A dropdown menu labeled "Currency" with "USD - U.S. Dollar" selected.
- Two columns of input fields:
 - Left column: "Total Funds Raised" (with an information icon), "Total Funds Donated" (with an information icon), and "Organization Benefited" (with an information icon).
 - Right column: "Total Funds Raised (USD)" (with an information icon) and "Total Funds Donated (USD)" (with an information icon).
- A checkbox labeled "Donation to LCIF" (with an information icon) at the bottom left.
- Two buttons at the bottom: "Cancel" and "Save".

A purple circle highlights the "Save" button. The background shows a list of service activities with columns for "Sponsor", "Cause", "Activity Level", and "Project Type".

22 Continuer à faire défiler

Additional Details

Signature Activity *i*

Funded by an LCIF Grant *i*

Venue *i*

Start Time *i*

End Time *i*

Venue Time Zone *i*
--None--

Cancel Save

23 Continuer le défilement pour saisir plus de détails facultatifs sur l'activité

Signature Activity *i*

Funded by an LCIF Grant *i*

Venue *i*

Start Time *i*

End Time *i*

Venue Time Zone *i*
--None--

Venue Location *i*
Venue Location (Country/Territory)

Cancel Save

24 Cliquer ici.

Signature Activity ⁱ

Funded by an LCIF Grant ⁱ

Venue ⁱ

Start Time ⁱ

End Time ⁱ

Venue Time Zone ⁱ
--None--

Venue Location ⁱ
Venue Location (Country/Territory)

Cancel Save

25 Cliquer sur « Sauvegarder » pour enregistrer vos données

Venue Location (City)

Venue Location (State/Province) --Nc ▾

Venue Location (ZIP/Postal Code)

Sponsor Details

Sponsor CA ⁱ U.S. and Affiliates, Bermuda and Bahamas

Sponsor District ⁱ District 1 J

Sponsor MD ⁱ Multiple District 1

Cancel Save

2

Une fois enregistré, un message vert « Succès ! » s'affichera. Cliquer sur le X pour fermer le message.

The screenshot shows a web application interface. At the top, a dark blue navigation bar contains the text "Home", "Membership", "Service", "Learn", and "More". A green success message is displayed at the top: "Service Activity 'a29Nq000001k5LtIAI' was saved." with a close button (X) circled in purple. Below the navigation bar, the main content area shows a service activity record for "SA-05292416". The record details include: "Example Club SA1 - Club Meeting July" (Title), "Example Club For Training" (Sponsor), and "Ready to Report" (Status). There are buttons for "Edit", "Copy", and "Delete". Below the record details, there are tabs for "Details" and "Image Gallery". The "Details" tab is active, showing an "Information" section with fields for "Record Type" (Meeting), "Report Complete" (checkbox), and "Title" (Example Club SA1 - Club Meeting). To the right, there is a section for "Image Gallery" with a "Upload Images" button and a message: "Use the Upload Images tab to begin uploading images."



Astuce ! Lorsque la date de fin de l'activité est passée, le statut est Prêt à signaler.

27 Cette activité de service est « Prêt à signaler »

Details Image Gallery

Information

Record Type: Meeting

Title: Example Club SA1 - Club Meeting July

Sponsor: Example Club For Training

Activity Level: Lions Club

Status: Ready to Report

Start Date: 7/5/2024

End Date: 7/5/2024

Report Complete:

Cause: Administration

Project Type: Activities in Strengthening Club

Description: Records the description of the activity

Created By: Example One, 9/15/2024, 6:21 PM

Imag... Uploa...

Use the **Upload Images** tab to begin uploading images.

28 Pour signaler l'activité terminée. Cliquer sur l'icône Crayon à côté de Rapport terminé

Service Activity SA-05292416

Edit Copy Delete

Title: Example Club SA1 - Club Meeting July

Sponsor: Example Club For Training

Status: Ready to Report

Details Image Gallery

Information

Record Type: Meeting

Title: Example Club SA1 - Club Meeting July

Sponsor: Example Club For Training

Activity Level: Lions Club

Report Complete:

Cause: Administration

Project Type: Activities in Strengthening Club

Description: Records the description of the activity

Created By: Example One, 9/15/2024, 6:21 PM

Imag... Uploa...

Use the **Upload Images** tab to begin uploading images.

29 Cliquer sur le champ Rapport terminé.



Service Activity
SA-05292416

Edit

Copy

Delete

Title

Example Club SA1 - Club Meeting July

Sponsor

[Example Club For Training](#)

Status

Ready to Report

Details

Image Gallery

Imag...

Uploa...

* = Required Information

Information

Record Type

Meeting

* Title

Example Club SA1 - Club Meetin

* Sponsor

Cancel

Save

Report Complete

Use the **Upload Images** tab to begin uploading images.

30 Cliquer sur « Enregistrer »



Service Activity
SA-05292416

Edit

Copy

Delete

Title

Example Club SA1 - Club Meeting July

Sponsor

[Example Club For Training](#)

Status

Ready to Report

Details

Image Gallery

Imag...

Uploa...

* = Required Information

Information

Record Type

Meeting

* Title

Example Club SA1 - Club Meetin

* Sponsor

Cancel

Save

Report Complete



Use the **Upload Images** tab to begin uploading images.



Ceci termine la création et le signalement d'une activité de service

Copier une activité de service



Astuce ! S'il s'agit d'une activité récurrente (de tout type), la configuration d'activités futures peut permettre de gagner du temps à l'avenir.

31 Cliquer sur Copy/Copier

Service Activity
SA-05292416

Home Membership Service Learn More

Search Search

Edit Copy Delete

Title: Example Club SA1 - Club Meeting July Sponsor: [Example Club For Training](#) Status: Reported

Details Image Gallery

Information

Record Type: Meeting Report Complete:

Title: Example Club SA1 - Club Meeting

Image Gallery Upload Images

Use the Upload Images tab to begin uploading images.



Astuce ! Vous êtes amené à l'activité nouvellement créée à partir du bouton Copier.

3

Une fois copié, un message vert « Succès ! » apparaîtra. Cliquer sur le X pour fermer le message.

The screenshot shows a web interface with a dark blue header. A green success message is displayed at the top: "Success! Success! Here is your copied activity. Begin editing now." with a close button (X) circled in purple. Below the header is a navigation menu with "Home", "Membership", "Service", "Learn", and "More". The main content area shows a "Service Activity" record for "SA-05292417". The record details include "Title: Example Club SA1 - Club Meeting July", "Sponsor: Example Club For Training", and "Status: Draft". There are "Edit", "Copy", and "Delete" buttons. Below the record is an "Information" section with "Record Type: Meeting" and "Report Complete" checkbox. A "Details" section is also visible.

33

Cliquer sur « Modifier »

The screenshot shows the same web interface as above, but the "Edit" button is circled in purple. The success message is no longer present. The "Service Activity" record and its details are the same as in the previous screenshot.

34 Il est recommandé de rendre le titre unique ! Cliquer sur le titre pour le modifier

Information

* = Required Information

Record Type
Meeting

*Title ⓘ
Example Club SA1 - Club Meeting Ju

*Sponsor ⓘ
Example Club For Training

Report Complete ⓘ

Cause
Administration

View all dependencies

Activity Level
Lions Club

Project Type
Activities in Strengthening Club

This field is calculated upon save

Cancel Save

35 Saisir Août



Attention Les dates de début et de fin ne sont pas copiées de l'activité. Ils doivent être saisis.

3

Si nécessaire, mettre à jour le nombre total de bénévoles et le nombre total d'heures de Bénévole, ainsi que toute autre mesure

The screenshot shows a modal window titled 'Required Metrics' overlaid on a background form. The 'Required Metrics' section contains the following fields:

- Total Volunteers**: A text input field containing the number '35'.
- Non-Lions Participated**: A checkbox that is currently unchecked.
- Non-Lion Family Members Participated**: A checkbox that is currently unchecked.
- Total Volunteer Hours**: A text input field containing the number '30'.

Below the 'Required Metrics' section is an 'Optional Metrics' section, which is partially visible and includes a field for 'People Served'. At the bottom of the modal are 'Cancel' and 'Save' buttons.

39

Faire défiler vers le haut et cliquer sur le champ Rapport terminé.

The screenshot shows a modal window titled 'Edit SA-05292417' with a scrollable content area. The 'Information' section contains the following fields:

- Record Type**: Meeting
- * Title**: Example Club SA2 - Club Meeting At (highlighted in yellow)
- * Sponsor**: Example Club For Training (with a close button 'X')
- Cause**: Administration (dropdown menu)
- Project Type**: Activities in Strengthening Club (dropdown menu)

The 'Report Complete' checkbox is highlighted with a purple circle. A legend at the top right indicates that an asterisk (*) denotes 'Required Information'. At the bottom of the modal are 'Cancel' and 'Save' buttons.

40 Cliquer sur « Enregistrer »

The screenshot shows a modal dialog titled "Information" for saving a service activity. The dialog contains the following fields and options:

- Record Type:** Meeting
- Title:** Example Club SA2 - Club Meeting Aug (highlighted with a yellow box)
- Sponsor:** Example Club For Training
- Report Complete:** (highlighted with a yellow box)
- Cause:** Administration
- Activity Level:** Lions Club
- Project Type:** Activities in Strengthening Club

At the bottom of the dialog are "Cancel" and "Save" buttons. A purple circle highlights the "Save" button. A note at the top right of the dialog states "* = Required Information".

4 Une fois enregistré, un message vert « Succès ! » s'affichera. Cliquer sur le X pour fermer le message. Votre activité de service a été signalée.

The screenshot shows the service activity page after successful registration. A green success message is displayed at the top: "Service Activity 'a29Nq000001k5NVIAY' was saved". A purple circle highlights the 'X' icon on the message to close it. Below the message is a navigation bar with "Home", "Membership", "Service", "Learn", and "More". The main content area shows the details of the service activity:

- Service Activity ID:** SA-05292417
- Title:** Example Club SA2 - Club Meeting Aug
- Sponsor:** Example Club For Training
- Status:** Reported

Below the details is an "Information" section with the following fields:

- Record Type:** Meeting
- Report Complete:**
- Title:** Example Club SA2 - Club Meeting

On the right side, there is an "Image Gallery" section with an "Upload Images" button and a message: "Use the Upload Images tab to begin uploading images."

42 Pour revenir aux détails du club, cliquer sur le nom du club ou sur l'onglet Détails

Service Activity
SA-05292417

Search [Search] [Bell] [Profile]

Home Membership ▾ Service ▾ Learn More ▾

Title: Example Club SA2 - Club Meeting Aug
Sponsor: [Example Club For Training](#)
Status: Reported

Details Image Gallery

Information

- Record Type: Meeting
- Title: Example Club SA2 - Club Meeting

Example Club For Training

- Lion ID: 200158
- Type: Lions Club
- Status: Active
- Billing Address: 124 Any Place, Naperville, Illinois 60565, United States

mag... Uploa...
the Upload Images tab to begin loading images.

43 Cliquer sur Activités de service du club pour voir l'activité de service nouvellement créée

Account
Example Club For Training [Follow]

Lion ID: 200158
Type: Lions Club
Status: Active
Billing Address: 124 Any Place, Naperville, Illinois 60565, United States
Active Member Count: 50

Club Details Data Export Club Statements **Club Service Activities** More

Member ... Club Acti...

Manage Club Members

Manage Club Officers




Manage Cub Club

Account Name: Example Club For Training
Parent Account: District 1 J
Region or Zone: SE Zone 1
Lion ID: 200158
Type: Lions Club
Active Member Count: 50
Club Specialty: Cultural
Club Sub-Specialty: [i]
Youth Programs: [i]
Specialty Description: [i]

44 La liste des activités de service s'affiche






Club Details Data Export Club Statements **Club Service Activities** More

Member ... Club Acti...



 Service Activities (2)  
2 items • Updated a minute ago

	End Date	Title	Service Acti...	Start Date	Re
1	7/5/2024	Example Club ...	SA-05292416	7/5/2024	<input checked="" type="checkbox"/>
2	8/5/2024	Example Club ...	SA-05292417	8/5/2024	<input checked="" type="checkbox"/>


[View All](#)

45 Cliquer sur « Accueil » pour revenir à la page d'accueil principale.

Search Search  




Home Membership ▾ Service ▾ Learn More ▾

 Account [Example Club For Training](#) [+ Follow](#)


Lion ID 200158	Type Lions Club	Status Active	Billing Address 124 Any Place Naperville, Illinois 60565 United States	Active Member Count 50
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Club Details Data Export Club Statements **Club Service Activities** More

Member ... Club Acti...

 Service Activities (2)  
2 items • Updated a minute ago

	End Date	Title	Service Acti...	Start Date	Re
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4

Ceci conclut le guide rapide Activités de service - Créer, signaler, copier une activité de réunion

Welcome Example One!

