

Actividades de servicio - Crear, presentar informes, copiar

Una actividad de reunión



Esta guía es esencial para cualquier persona que desee gestionar eficazmente las actividades del Lion Portal. Proporciona instrucciones paso a paso sobre cómo crear, presentar informes y copiar actividades de servicio, centrándose específicamente en las reuniones, que ahora tienen sus propias métricas de presentación de informes. Al seguir esta guía, los usuarios pueden agilizar su proceso, asegurando la entrada de datos precisos y el seguimiento eficaz de los esfuerzos de los voluntarios. Además, los consejos incluyen mejorar la facilidad de uso, lo que facilita la navegación y la gestión de las actividades de manera efectiva.



Consejo Las actividades de la reunión ahora tienen su propia clasificación para la presentación de informes. Las métricas de este tipo de actividades se agrupan en "Reuniones".

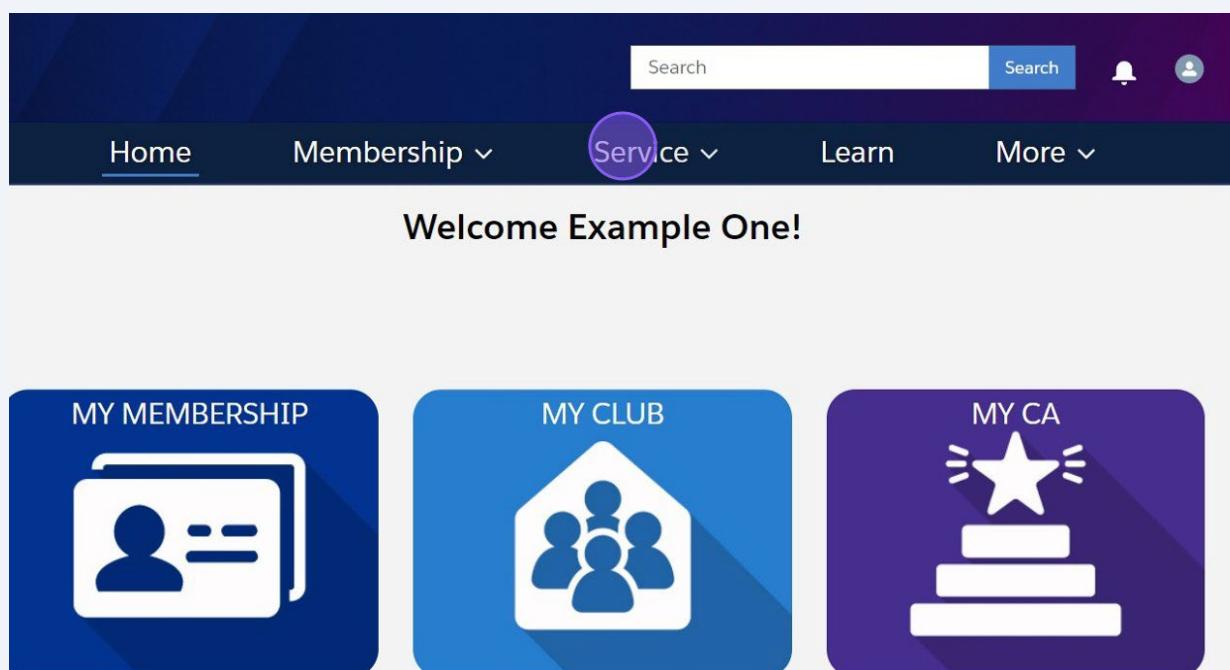
Esta guía rápida cubre la creación, presentación de informes, copia y presentación de informes de la nueva actividad para el tipo de actividad de reunión.

1

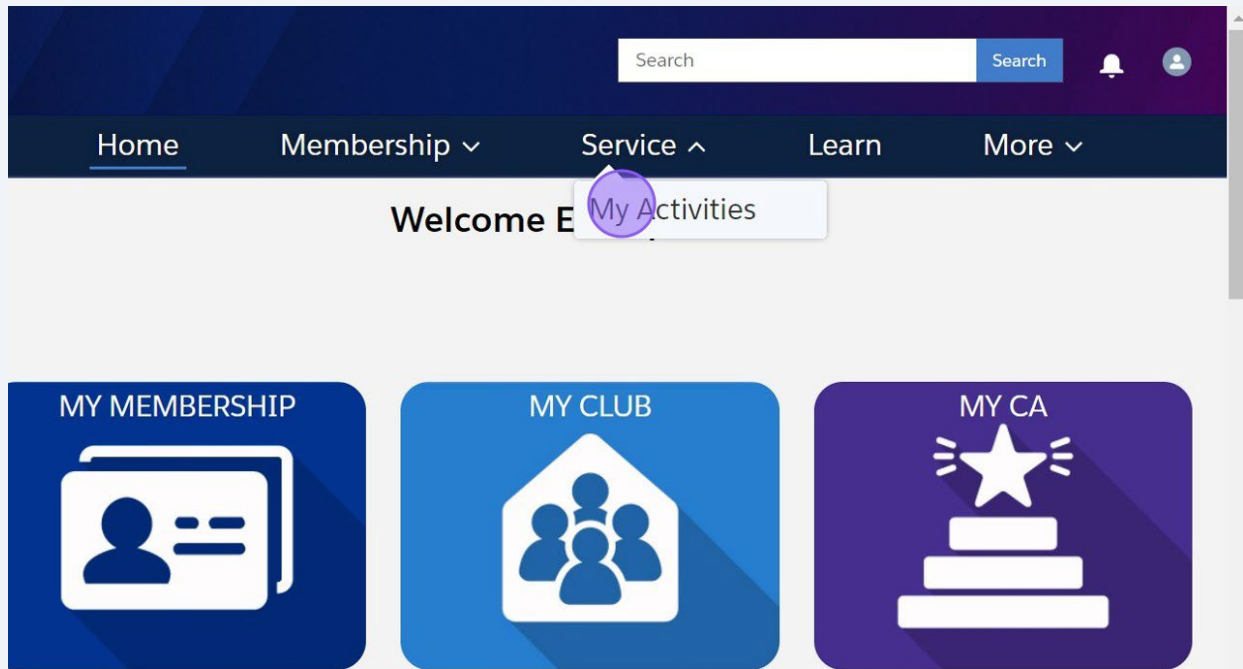
Inicie sesión en el Lion Portal. lionportal.org

2

Haga clic en "Servicio"

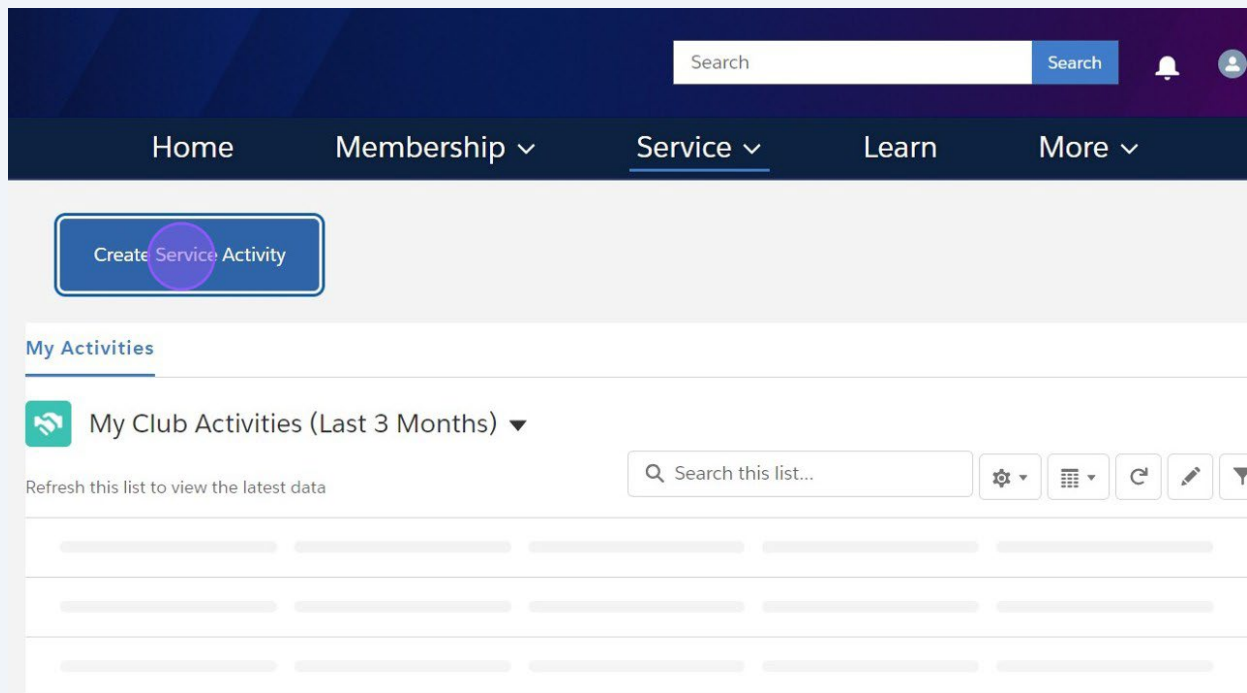


3 Haga clic en "Mis actividades"



Crear una actividad de servicio

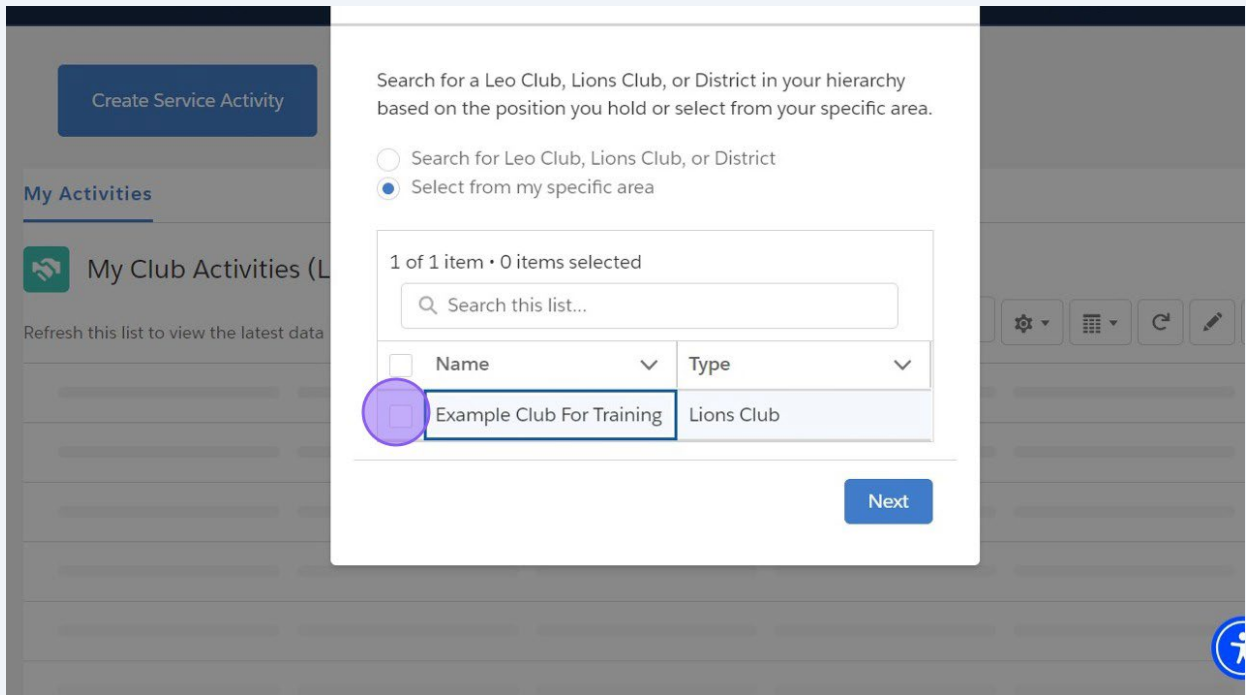
4 Haga clic en la pestaña "Actividades de servicio de club"



Consejo, se muestran las opciones para navegar a los clubes Leo, León o distritos adicionales donde también puede tener permisos para gestionar su Actividades de servicio.

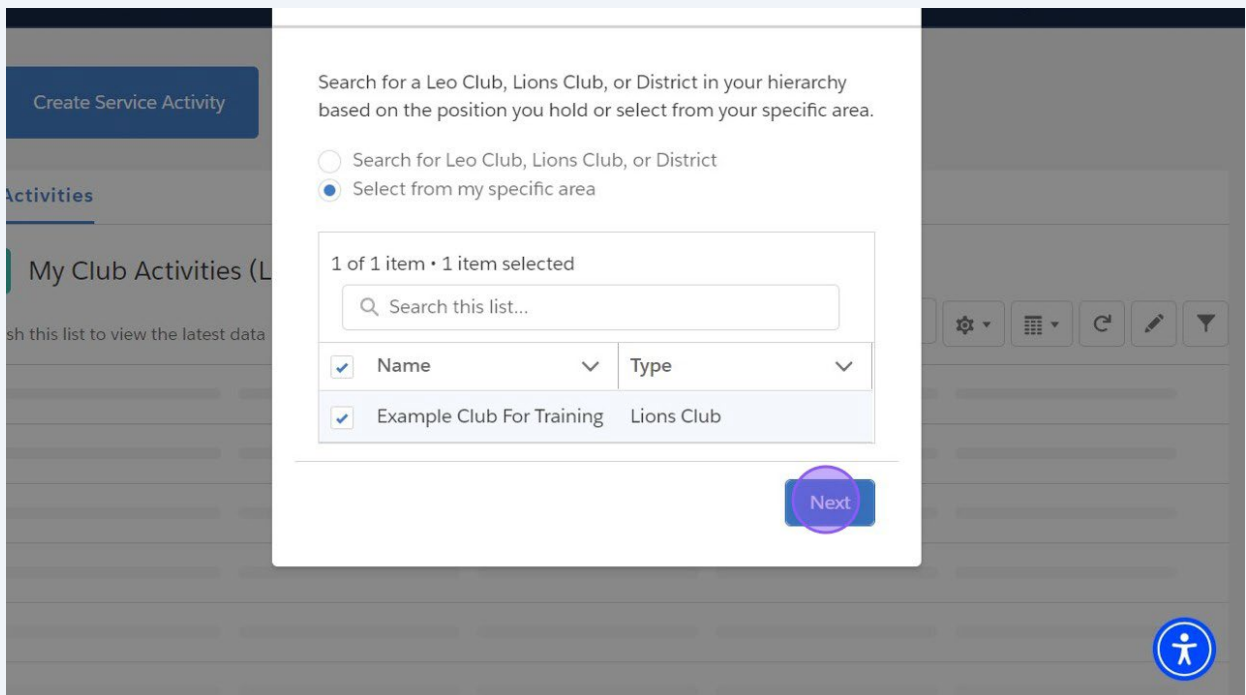
5

Para crear una actividad de servicio para su club, haga clic en el botón de radio junto al nombre de su club.



6

Haga clic en "Siguiente"



7 Ingrese un título para la actividad de servicio.



Consejo Cada tipo de actividad de servicio tiene diferentes campos de datos obligatorios. Los tipos de actividades de servicio son:

- Proyecto de servicio
- Recaudación de fondos
- Donación
- Reunión

8

Haga clic en este menú desplegable. Seleccionar el tipo de actividad de servicio

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...

Previous Next

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--

ⓘ

9 Este ejemplo es una actividad de servicio de tipo reunión, haga clic en "Siguiete"

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 Se crea una nueva actividad de servicio. Para empezar a editar la actividad haga clic en el icono de un lápiz o en el botón "editar" en la esquina superior derecha.

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

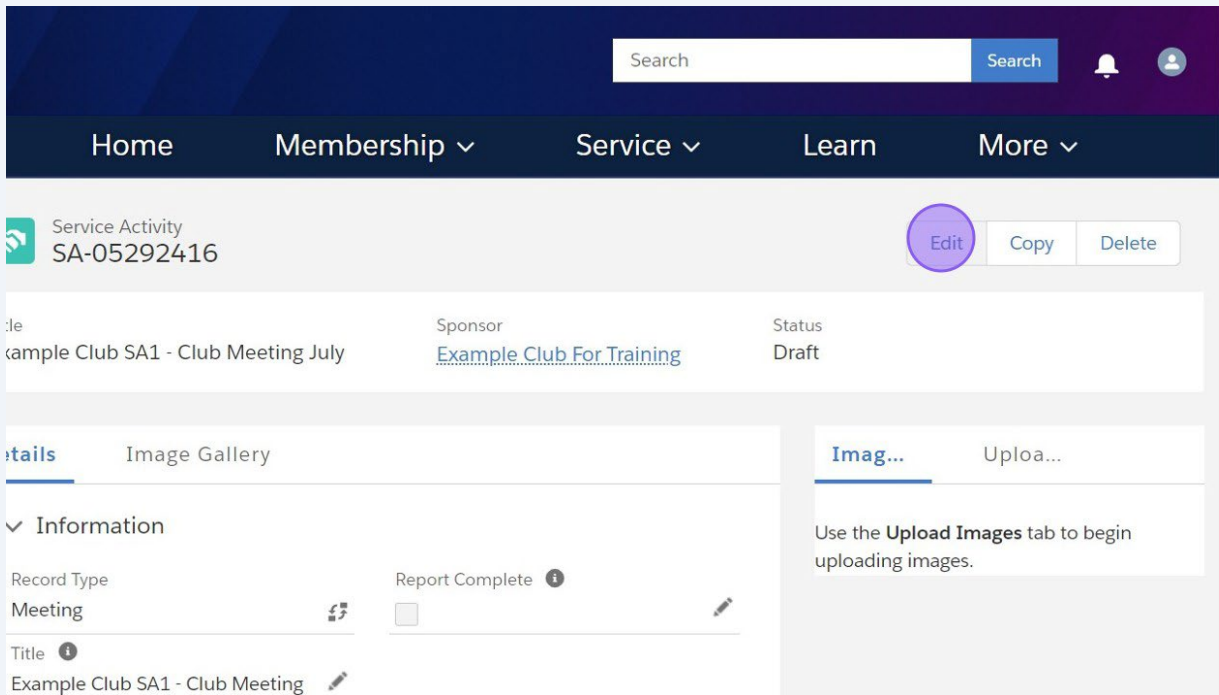
Sponsor Example Club For Training Cause Administration

Activity Level Project Type

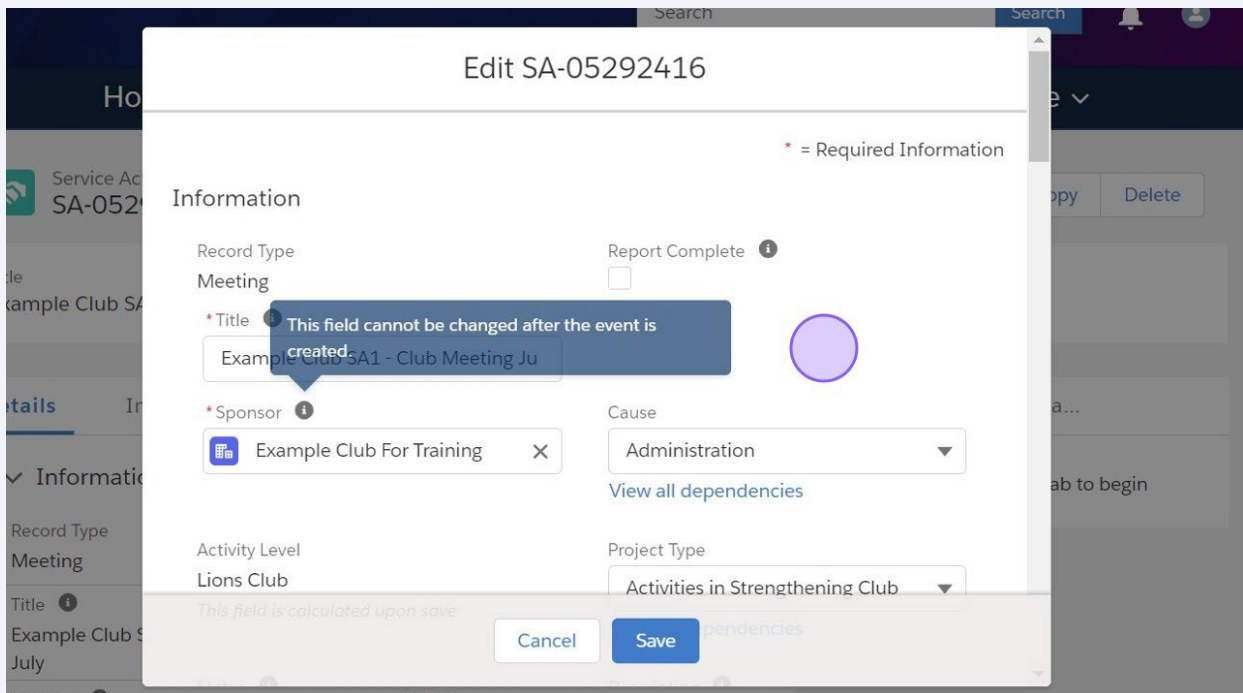
Image Gallery Upload Images

Use the Upload Images tab to begin uploading images.

11 Si hace clic en "Editar" se abrirá un nuevo pop-up



12 Para introducir/actualizar datos, haga clic en los campos o use la tecla "tab"



13 Puede desplazarse por el formulario

The screenshot shows a mobile application form for creating a meeting. The form is partially visible, with a white overlay containing the following fields:

- 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)
- * Start Date:** (Empty date field)

At the bottom of the form, there are "Cancel" and "Save" buttons. A purple circle highlights the right edge of the form, indicating a scroll gesture.

14 La actividad de servicio requiere una descripción Haga clic en el campo "Descripción" para introducir datos.

The screenshot shows the same mobile application form as in the previous image, but with the "Description" field highlighted by a purple circle. The form now includes the following additional information:

- * Start Date:** (Empty date field)
- Created By:** Example One, 9/15/2024, 6:21 PM

The "Description" field is a text box with a vertical cursor, and a purple circle highlights it, indicating that the user should click on it to enter data.

15 Haga clic en el campo "*Fecha de inicio". Escriba la fecha utilizando el formato MM/DD/AAAA

The screenshot shows a form editor for a project. The 'Start Date' field is highlighted with a purple circle. The form includes 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 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

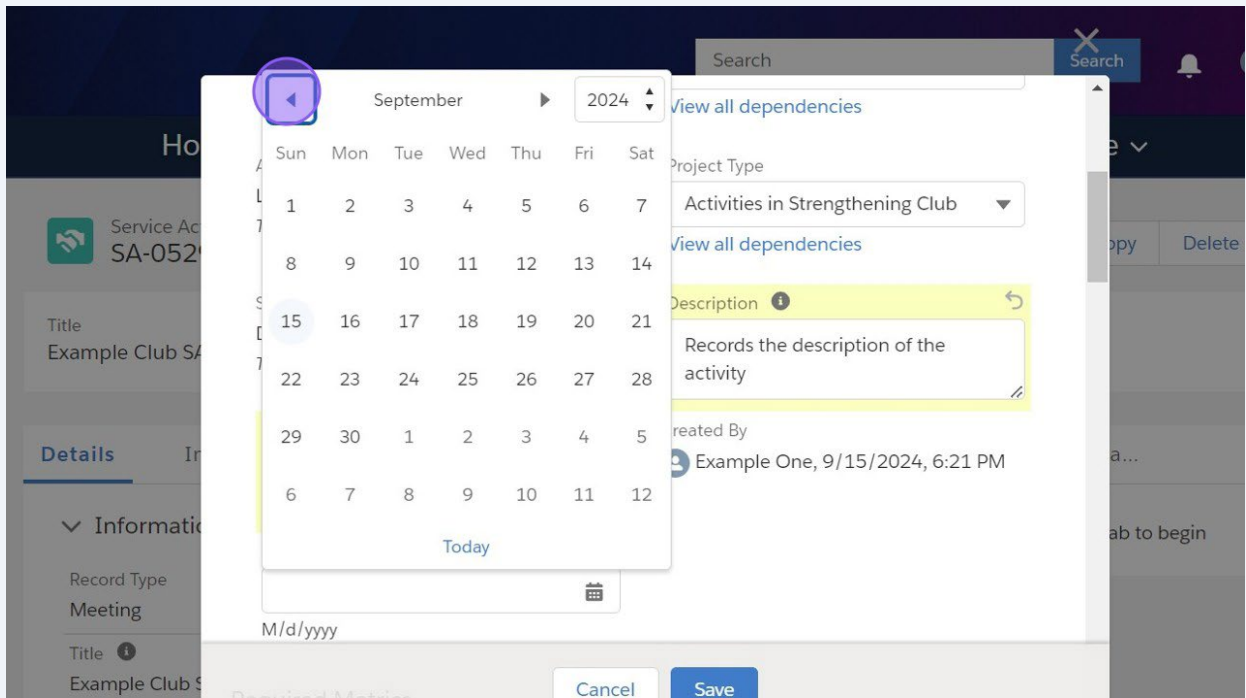
16 Haga clic en el campo "Fecha de finalización".

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

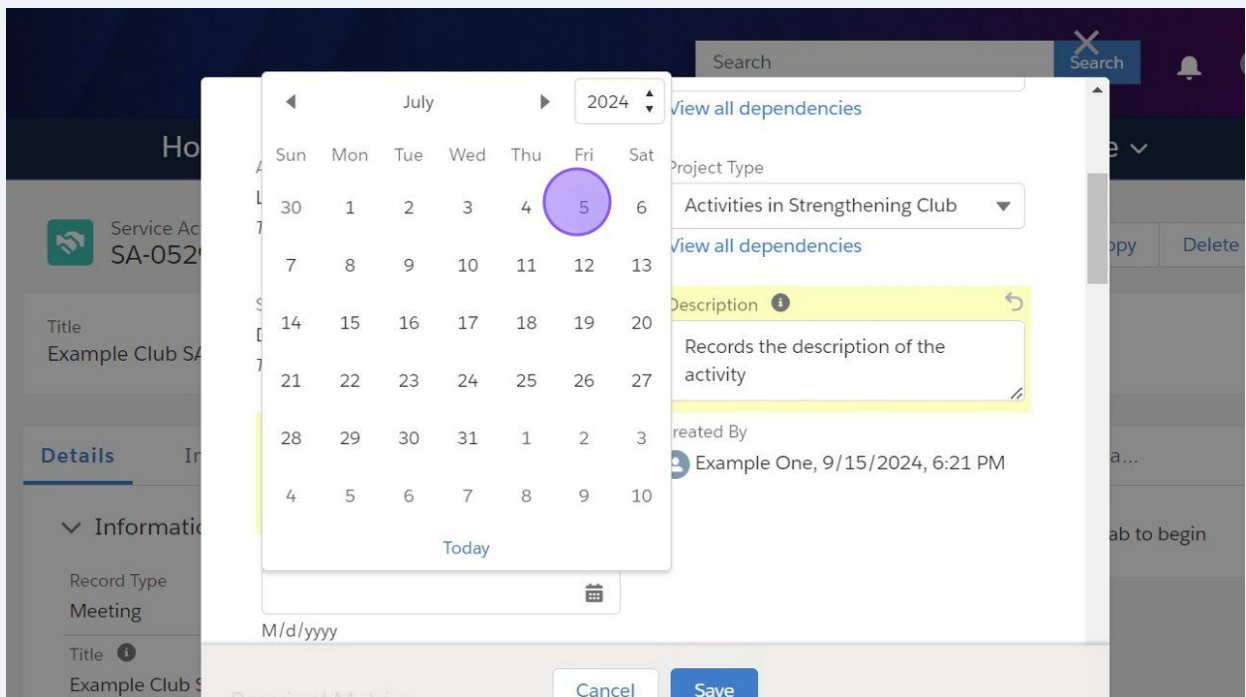
- Activity Level: Lions Club (This field is calculated upon save)
- Status: Draft (This field is calculated upon save)
- *Start Date: 7/5/2024
- End Date: (This field is highlighted with a purple circle)
- Project Type: Activities in Strengthening Club
- Description: Records the description of the activity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

Buttons: Cancel, Save

17 Haga clic en el icono del calendario para seleccionar una fecha del calendario



18 Haga clic en la fecha



19 Haga clic en el campo "Total de voluntarios" para introducir los datos

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 Haga clic en el campo "Total de horas de voluntariado" para introducir las horas. Este es un campo de datos obligatorio

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



Consejo

Se requieren fondos totales donados para un tipo de actividad de servicio de "donación". Se requieren fondos totales recaudados para un tipo de actividad de servicio de "recaudación de fondos".

Los fondos pueden introducirse en la moneda local seleccionando "Moneda" y cambiando el tipo de moneda.

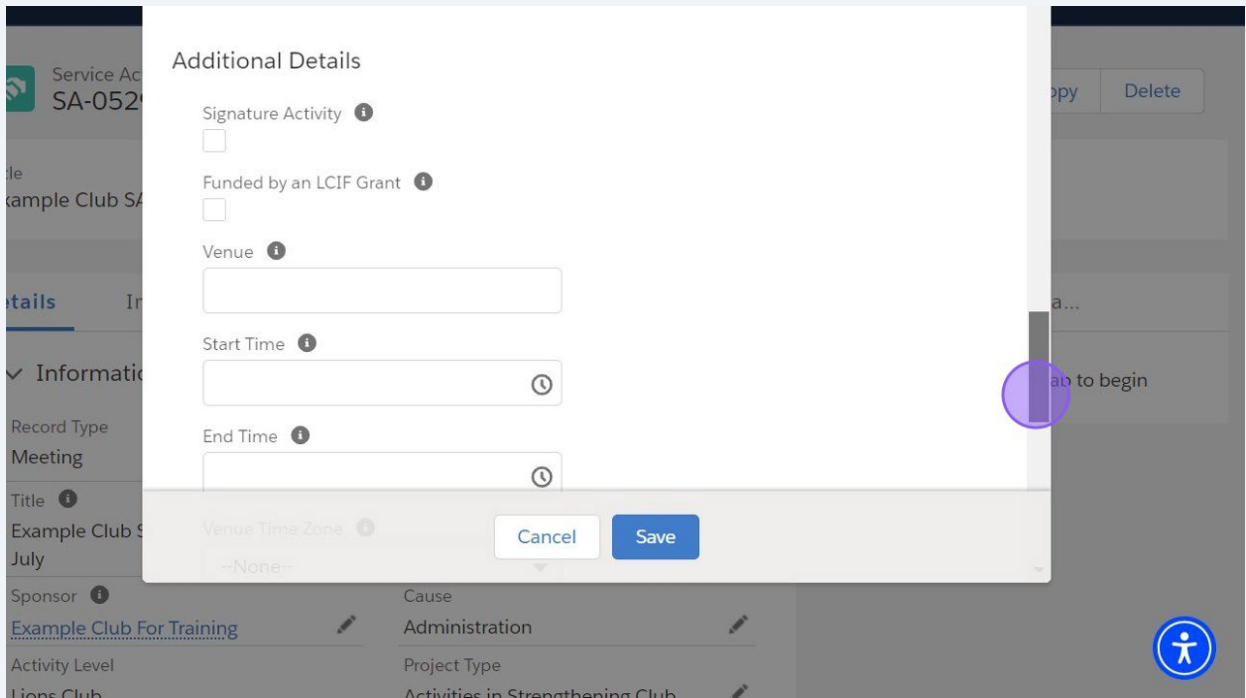
21 Desplazándose más lejos, se muestran más métricas.

The screenshot shows a mobile application interface with a form overlay. The form is titled "Service Activity" and includes the following fields:

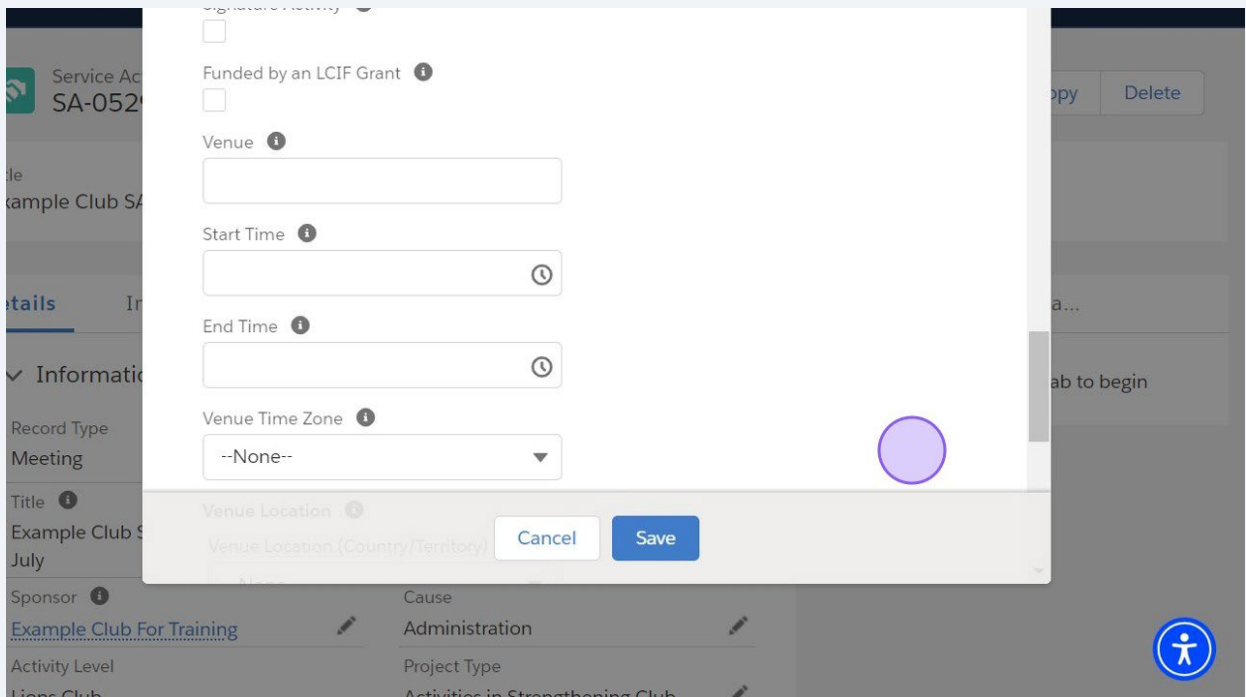
- A text input field at the top.
- A "Currency" dropdown menu set to "USD - U.S. Dollar".
- Two columns of input fields for financial metrics:
 - Left column: "Total Funds Raised" (with an info icon) and "Total Funds Donated" (with an info icon).
 - Right column: "Total Funds Raised (USD)" (with an info icon) and "Total Funds Donated (USD)" (with an info icon).
- An "Organization Benefited" text input field (with an info icon).
- A "Donation to LCIF" checkbox (with an info icon).
- At the bottom of the form, there are "Cancel" and "Save" buttons. 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". A blue person icon is visible in the bottom right corner of the app.

22 Continúe desplazándose.



23 Continúe desplazándose para introducir más detalles opcionales sobre la actividad



24 Haga clic aquí.

Signature Activity

Funded by an LCIF Grant

Venue

Start Time

End Time

Venue Time Zone

Venue Location

Venue Location (Country/Territory)

Cancel Save

The screenshot shows a modal form with several input fields. A purple circle highlights the 'Save' button at the bottom right of the modal. The background shows a list of records with columns for Sponsor, Cause, and Project Type.

25 Haga clic en "Guardar" para guardar la entrada de datos

Venue Location (City)

Venue Location (State/Province)

Venue Location (ZIP/Postal Code)

Sponsor Details

Sponsor CA

Sponsor District

Sponsor MD

Cancel Save

The screenshot shows a modal form with fields for Venue Location and Sponsor Details. A purple circle highlights the 'Save' button at the bottom right of the modal. The background shows the same record list as in the previous screenshot.

2

Cuando se guarde, aparecerá el mensaje verde "¡Éxito!". Haga clic en la "X" para cerrar el mensaje.

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 banner at the top reads "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: "Title: Example Club SA1 - Club Meeting July", "Sponsor: Example Club For Training", and "Status: Ready to Report". 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."



Consejo Cuando haya pasado la fecha de finalización de la actividad, el estado se establecerá en "Listo para presentar el informe".

27 Esta actividad de servicio está "lista para presentar informes"

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 Para presentar el informe de la actividad completada. Haga clic en el icono de lápiz junto a "Informe completado"

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 Haga clic en el campo "Informe completado".

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 Meeting

* Sponsor

Report Complete

Cancel Save

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

30 Haga clic en "Guardar"

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 Meeting

* Sponsor


Report Complete

Cancel Save

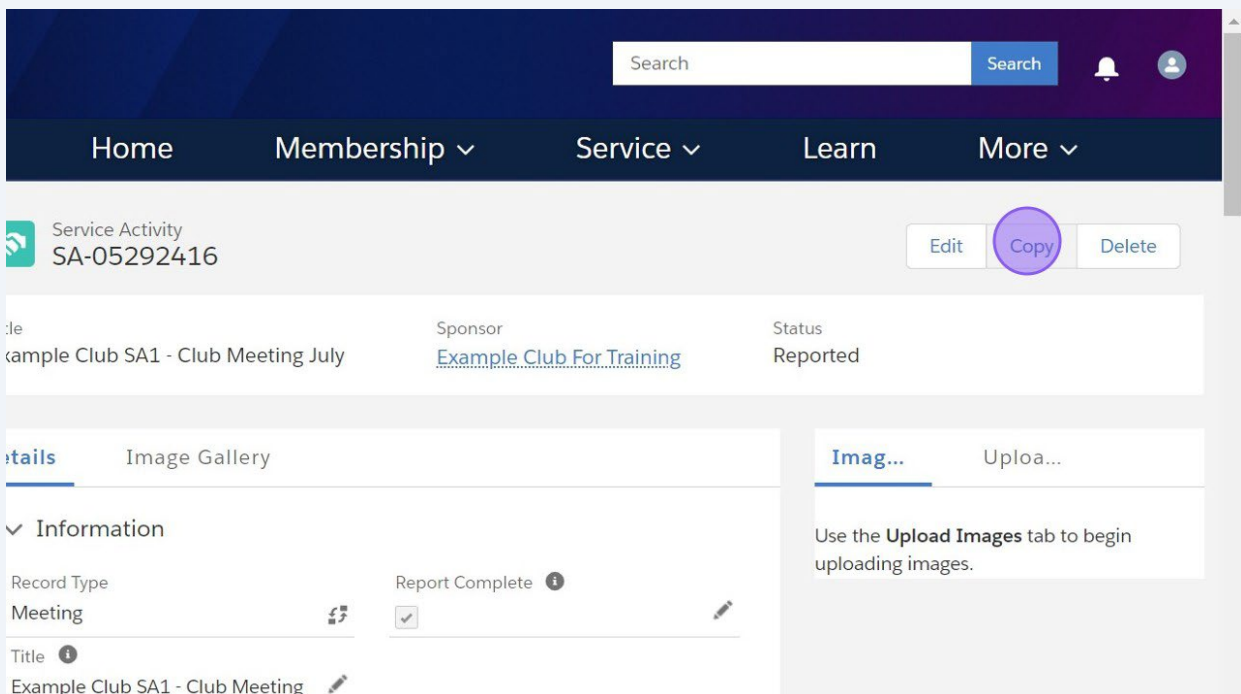
Use the **Upload Images** tab to begin uploading images.

 Esto completa la creación y presentación de informes de una actividad de servicio

Copiar una actividad de servicio

 Consejo, si se trata de una actividad recurrente (de cualquier tipo), configurar actividades futuras ahora puede ahorrar tiempo en el futuro.

31 Haga clic en "Copiar"



Search

Home Membership Service Learn More

Service Activity SA-05292416

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.

 Consejo, se le llevará a la actividad recién creada desde el botón de copiar.

3

Al copiar, aparecerá un mensaje verde que dice "¡Éxito!". Haga clic en la "X" para cerrar el mensaje.

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 fields for "Record Type" (Meeting), "Report Complete" (checkbox), and "Title" (Example Club SA1 - Club Meeting). To the right, there is an "Image Gallery" section with "Imag..." and "Uploa..." tabs and a message: "Use the Upload Images tab to begin uploading images."

33

Haga clic en "Editar"

This screenshot is identical to the one above, but the "Edit" button in the top right corner of the record details is circled in purple, indicating the next step in the process.

34 Se recomienda que haga que el título sea único. Haga clic en el "Título" para editar

Information

* = Required Information

Record Type
Meeting

Report Complete

*Title

*Sponsor

Cause
Administration

View all dependencies

Activity Level
Lions Club

Project Type
Activities in Strengthening Club

Cancel Save

This field is calculated upon save

35 Escriba "Aug"



¡Alerta! Las fechas de inicio y finalización no se copian de la actividad. Estos deben ser ingresados.

36 Haga clic en el campo "*Fecha de inicio" e ingrese la fecha. Repita para la "fecha de finalización"

This field is calculated upon save

Status ⓘ
Draft
This field is calculated upon save

Description ⓘ
Records the description of the activity

* Start Date ⓘ
M/d/yyyy

End Date ⓘ
M/d/yyyy

Created By
Example One, 9/15/2024, 6:27 PM

Required Metrics

Total Volunteers ⓘ
30

Cancel Save

37 Haga clic en el campo "Total de voluntarios".

M/d/yyyy

End Date ⓘ
8/5/2024
M/d/yyyy

Required Metrics

Total Volunteers ⓘ
30

Non-Lions Participated ⓘ

Non-Lion Family Members Participated ⓘ

Total Volunteer Hours ⓘ
30.00

Optional Metrics

Cancel Save

3

Si es necesario, actualice el "Total de voluntarios" y el "Total de horas de voluntariado" y cualquier otra métrica

The screenshot shows a modal window titled "Required Metrics" overlaid on a background form. The modal 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

Desplácese hacia la parte superior y haga clic en el campo "Informe completado".

The screenshot shows a modal window titled "Edit SA-05292417" overlaid on a background form. The modal contains the following fields:

- Record Type**: A dropdown menu set to "Meeting".
- * Title**: A text input field containing "Example Club SA2 - Club Meeting At".
- * Sponsor**: A dropdown menu set to "Example Club For Training".
- Cause**: A dropdown menu set to "Administration".
- Project Type**: A dropdown menu set to "Activities in Strengthening Club".
- Report Complete**: A checkbox that is currently unchecked and is highlighted with a purple circle.

At the bottom of the modal are "Cancel" and "Save" buttons. A note at the bottom left states "This field is calculated upon save".

40 Haga clic en "Guardar"

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 bottom of the dialog states: "This field is calculated upon save".

4 Cuando se guarde, aparecerá el mensaje verde "¡Éxito!". Haga clic en la "X" para cerrar el mensaje. Han sido remitidas las actividades de servicio de su club.

The screenshot shows the confirmation page for a saved service activity. At the top, a green notification banner reads: "Service Activity 'a29Nq000001k5NVIAY' was saved". Below the banner is a navigation menu with "Home", "Membership", "Service", "Learn", and "More".

The main content area displays the service activity details:

- 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 Para volver a los detalles del club, haga clic en el Nombre del club o en la pestaña "Detalles"

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 Haga clic en "Actividades de servicio de club" para ver la Actividad de servicio recién creada

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...

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

Manage Club Members
Manage Club Officers
Manage Cub Club

44 Se muestra la lista de actividades de servicio

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

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	✓
2	8/5/2024	Example Club ...	SA-05292417	8/5/2024	✓

View All

Member ... Club Acti...

- Manage Club Members
- Manage Club Officers
- Manage Cub Club Leader
- Manage Delegates
- View Delegates

45 Haga clic en "Inicio" para volver a la página de destino principal.

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

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

	End Date	Title	Service Acti...	Start Date	Re
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Member ... Club Acti...

- Manage Club Members

4

Con esto concluye la Guía rápida "Actividades de servicio: crear, informar y copiar una actividad de reunión".

Welcome Example One!

