


Serviceaktiviteter - Skapa, inrapportera och kopiera samt möten

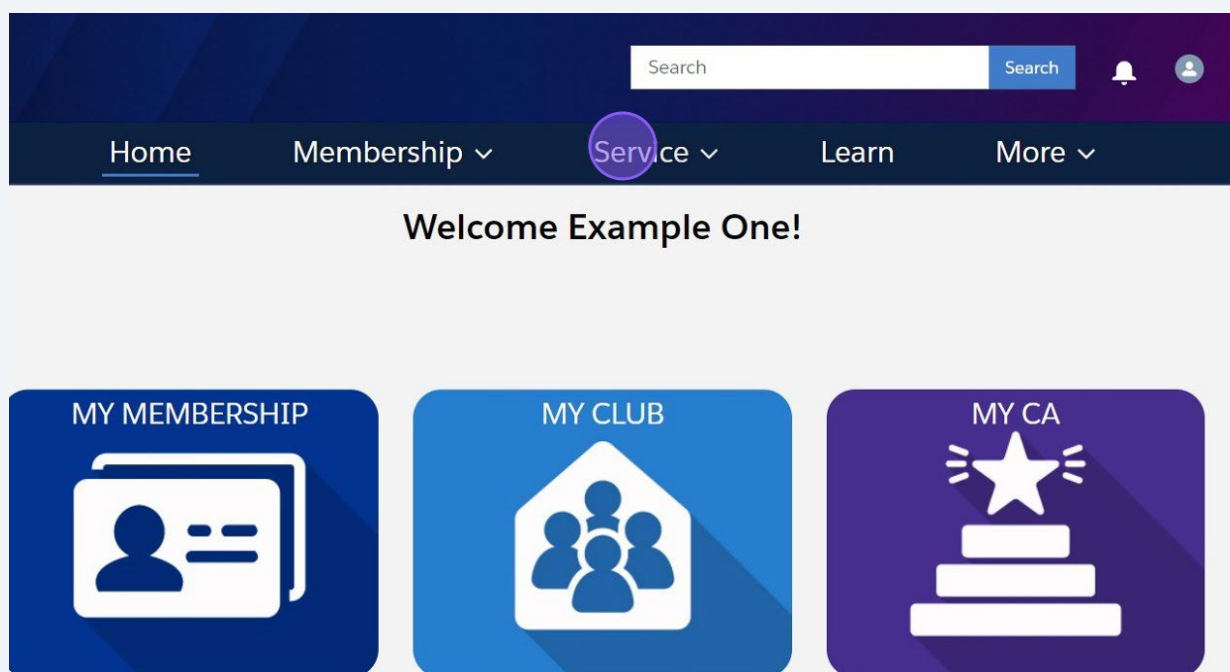
Denna vägledning är viktig för alla som vill hantera aktiviteter och möten i Lion Portal på ett effektivt sätt. Den innehåller instruktioner om hur du skapar, inrapporterar och kopierar serviceaktiviteter, med särskilt fokus på möten som nu kan inrapporteras separat. Genom att följa denna vägledning kan användarna effektivisera sin process, säkerställa korrekt inmatning av information och effektiv uppföljning av medlemmarnas insatser. De tips som ingår förbättrar dessutom användbarheten, vilket gör det lättare att navigera och hantera aktiviteter på ett effektivt sätt.

 **Tips!** Möten har nu en egen klassificering vid inrapportering. Information om denna typ av aktivitet finns under "Möten".

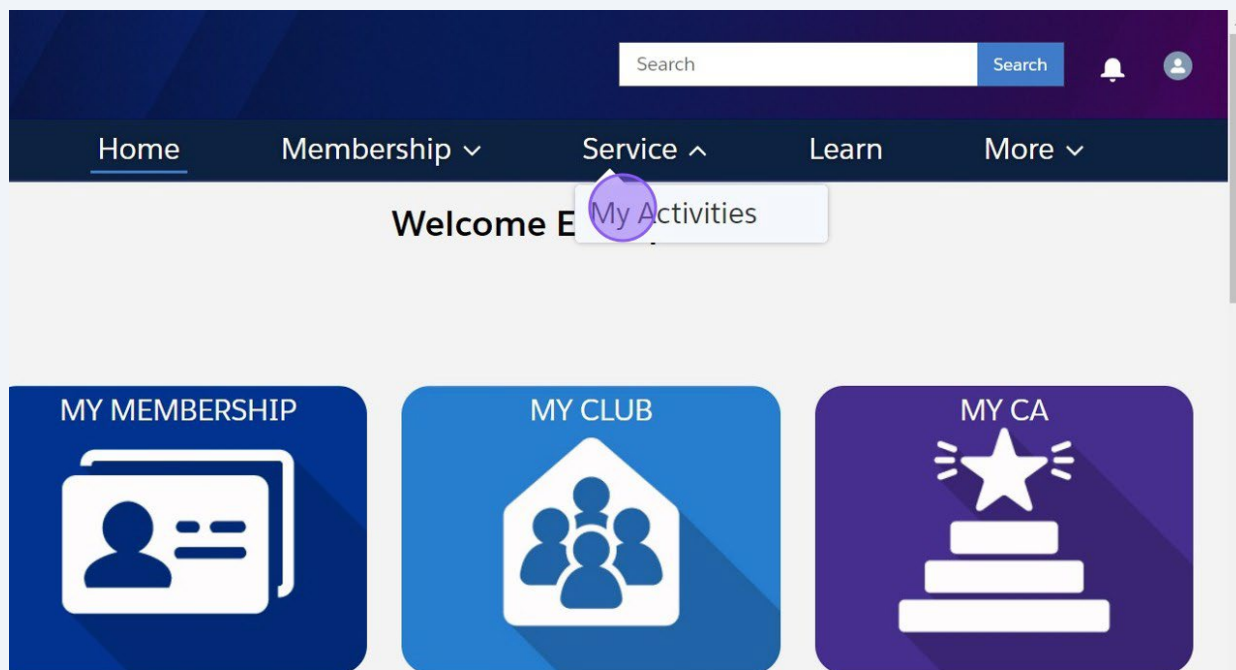
Denna snabbvägledning handlar om att skapa, inrapportera och kopiera aktiviteter samt att inrapportera den nya aktiviteten för typen "Möte".

1 Logga in på Lion Portal lionportal.org

2 Klicka på "Hjälpinsatser".



3 Klicka på "Mina aktiviteter".



Skapa en serviceaktivitet

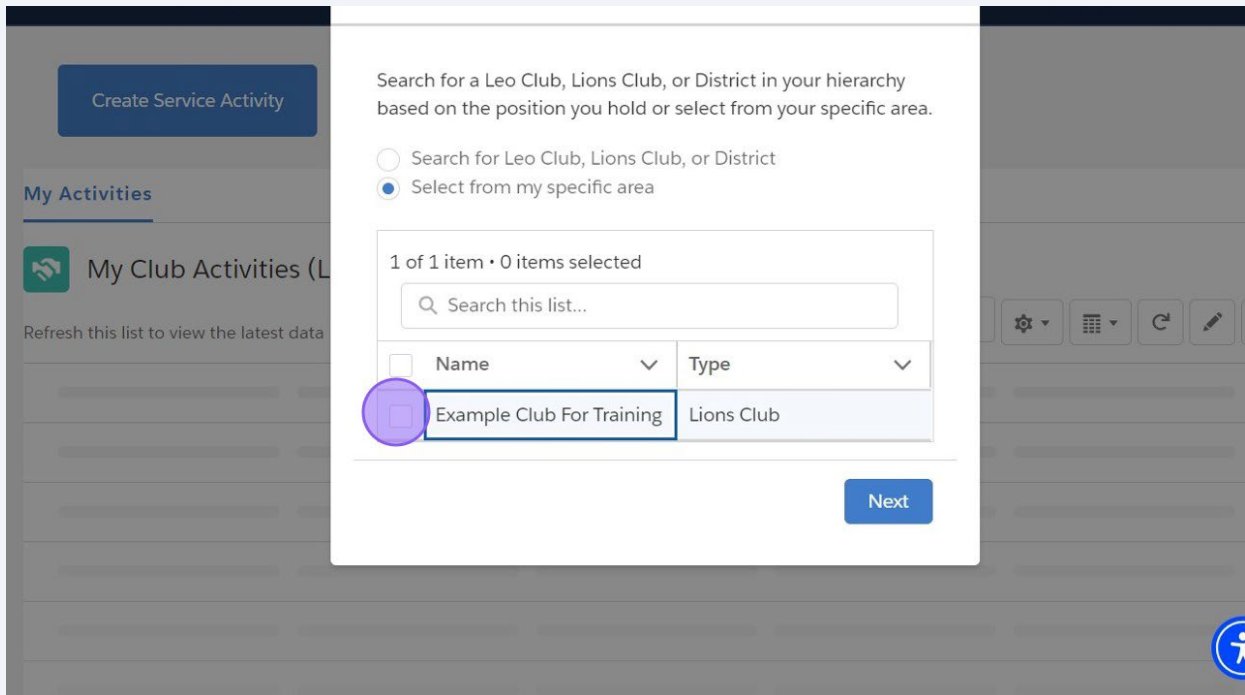
4 Klicka på "Skapa serviceaktivitet".

The screenshot displays a web application interface. At the top, there is a dark blue navigation bar with a search box on the right containing the text "Search" and a "Search" button. To the right of the search box are a notification bell icon and a user profile icon. Below the navigation bar, the main menu includes "Home", "Membership" with a dropdown arrow, "Service" with a dropdown arrow and a blue underline, "Learn", and "More" with a dropdown arrow. Below the menu is a light gray area containing a blue button with rounded corners labeled "Create Service Activity". Underneath this is a section titled "My Activities" with a blue underline. Below the title is a green icon of two hands shaking, followed by the text "My Club Activities (Last 3 Months)" and a dropdown arrow. Below this is a search box with the placeholder text "Search this list...". To the right of the search box are several icons: a gear for settings, a grid for view options, a refresh icon, an edit icon, and a filter icon. Below these elements are three rows of placeholder text represented by horizontal lines.

i Tips! Alternativ visas att navigera till ytterligare Lions, Leos eller distrikt vars serviceaktiviteter du kanske också har behörighet att hantera.

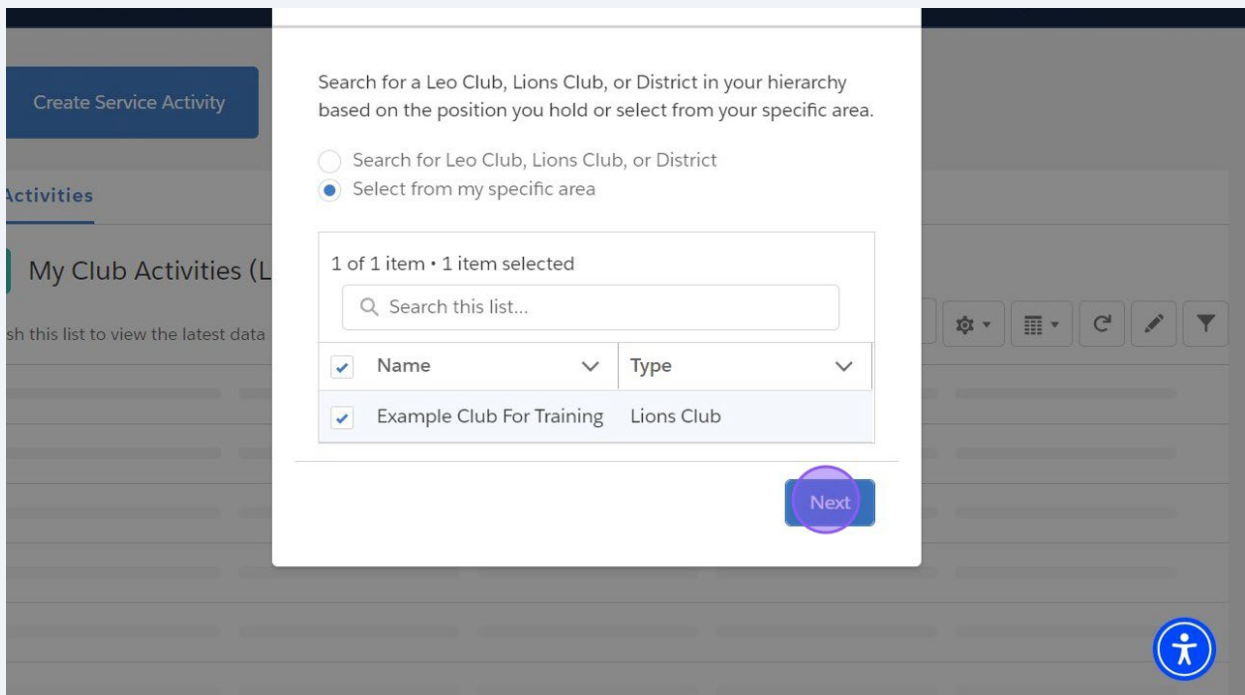
5

För att skapa en serviceaktivitet för din klubb klickar du på knappen bredvid klubbens namn.



6

Klicka på "Nästa".



7 Ange en titel för serviceaktiviteten.

i Tips! Varje typ av serviceaktivitet har olika obligatoriska fält. Typerna av serviceaktiviteter är:

- Serviceprojekt
- Insamling
- Donation
- Möte

8 Klicka på denna meny. Välj typ av aktivitet.

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...

Settings List Refresh Edit Filter

Previous Next

9 Detta exempel är en aktivitet av typen "Möte". Klicka på "Nästa".

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

10 En ny serviceaktivitet skapas. För att börja redigera aktiviteten klickar du på ikonen med en penna eller på knappen "Redigera" uppe till höger.

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

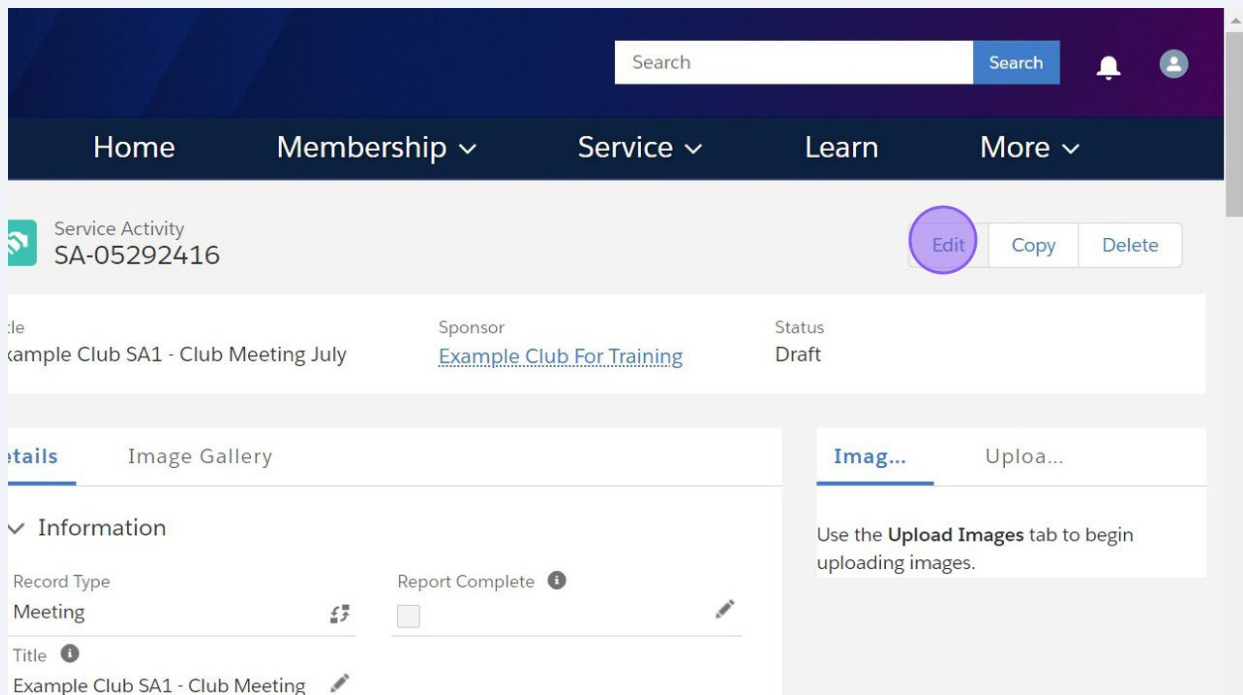
Sponsor Example Club For Training Cause Administration

Activity Level Project Type

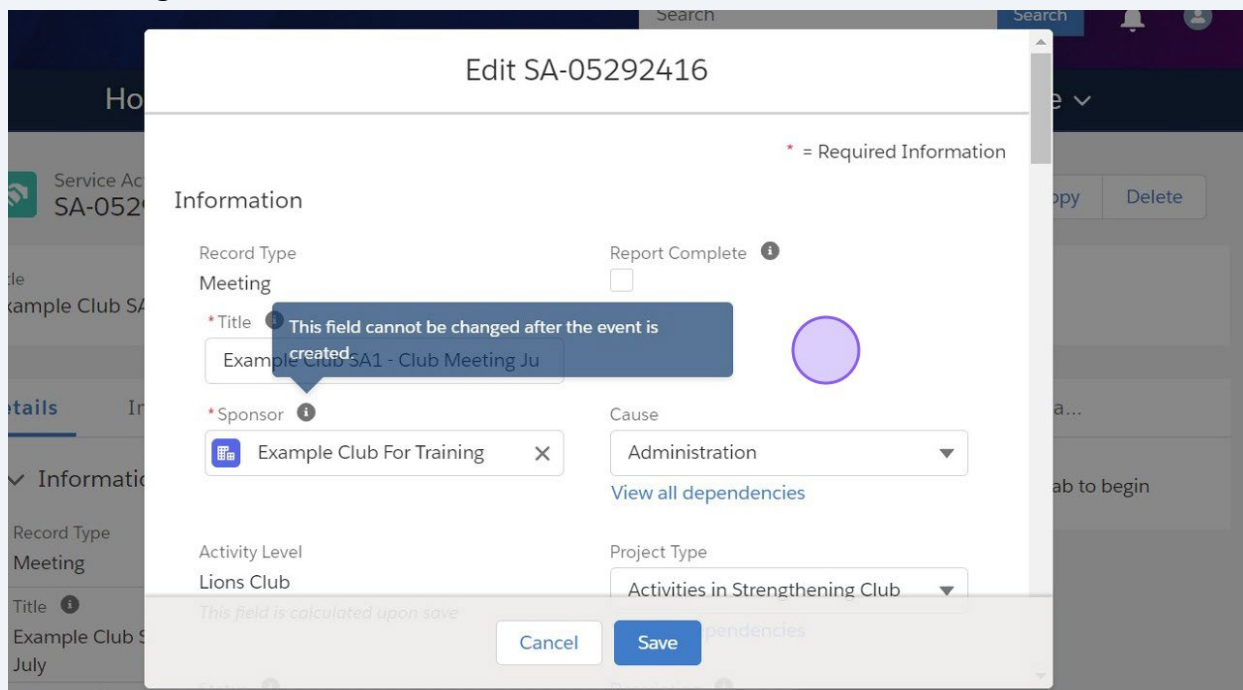
Image Gallery

Use the Upload Images tab to begin uploading images.

11 Om du klickar på "Ändra" öppnas ett nytt fönster.



12 För att mata in eller uppdatera information klickar du i fälten eller använder tab-tangenten.



13 Du kan bläddra genom formuläret.

A screenshot of a web application form for creating a meeting. The form is displayed in a modal window over a list of records. The form fields include: Record Type (Meeting), Title (Example Club SA1 - Club Meeting Ju), Sponsor (Example Club For Training), Cause (Administration), Activity Level (Lions Club), Project Type (Activities in Strengthening Club), Status (Draft), and Description. There are 'Cancel' and 'Save' buttons at the bottom. A purple circle highlights the right side of the form, indicating navigation options.

14 Serviceaktiviteter kräver en beskrivning. Klicka i fältet "Beskrivning" för att ange information.

A screenshot of the same web application form, but with a purple circle highlighting the Description field. The form fields are the same as in the previous screenshot, but the Description field is now active and highlighted. The 'Created By' field shows 'Example One, 9/15/2024, 6:21 PM'. There are 'Cancel' and 'Save' buttons at the bottom.

- 15** Klicka i fältet "*Startdatum". Skriv in datumet med hjälp av formatet MM/DD/ÅÅÅÅ.

The screenshot shows a form with the following fields and values:

- Activity Level: Lions Club (Note: This field is calculated upon save)
- Status: Draft (Note: This field is calculated upon save)
- *Start Date: (Empty field, highlighted with a purple circle)
- End Date: (Empty field)
- 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

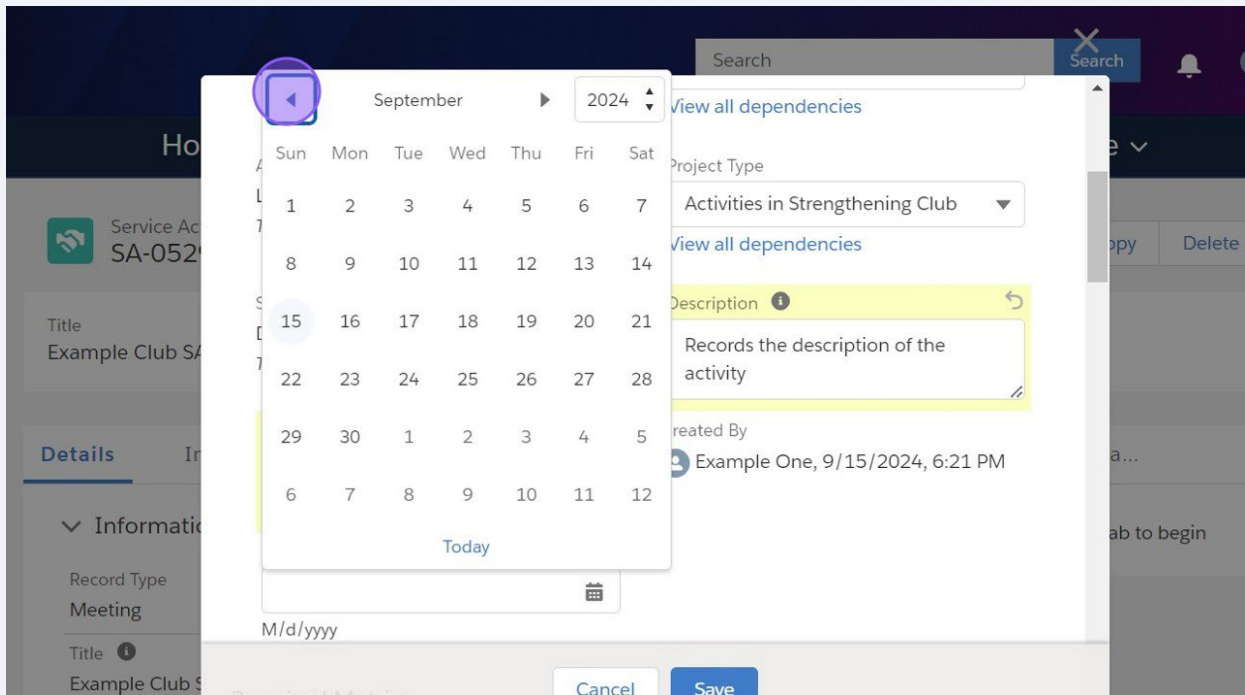
- 16** Klicka i fältet "Slutdatum".

The screenshot shows the same form as above, but with the following changes:

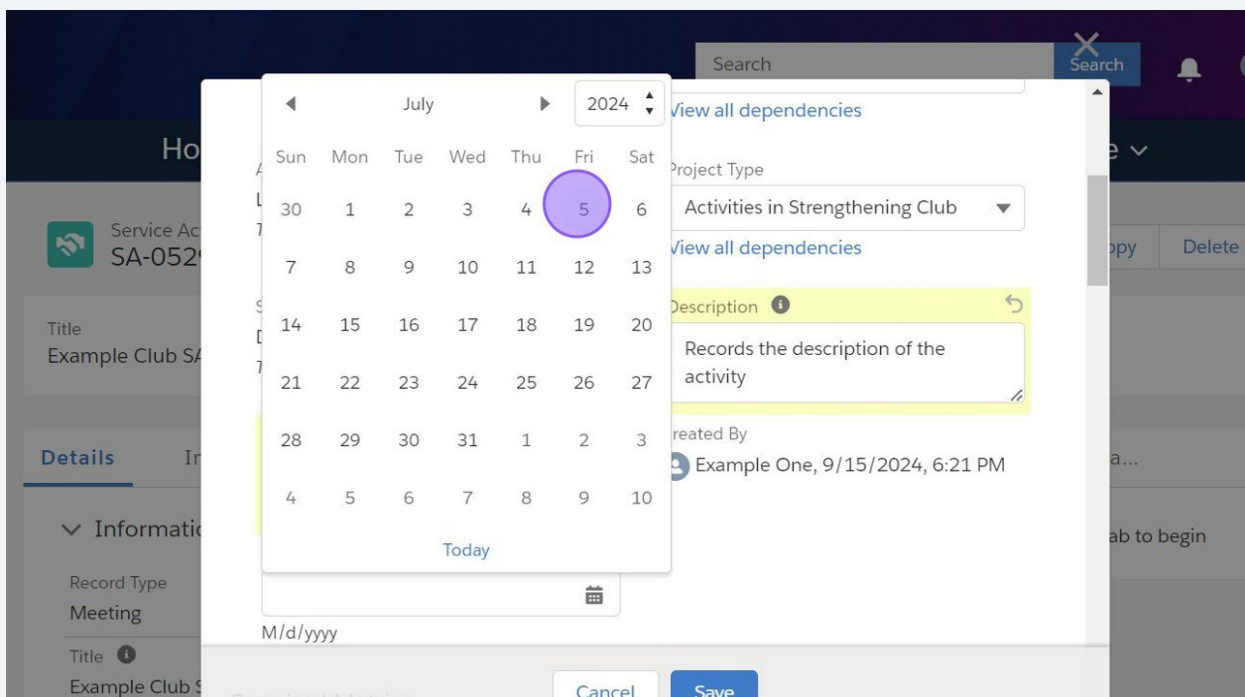
- *Start Date: 7/5/2024 (Highlighted with a yellow background)
- End Date: (Empty field, highlighted with a purple circle)

Buttons: Cancel, Save

17 Klicka på kalendersymbolen för att välja ett datum från en kalender.



18 Klicka på datumet.



19 Klicka i fältet "Totalt antal frivilliga" för att ange uppgifterna.

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

20 Klicka i fältet "Totalt antal arbetstimmar" för att ange timmarna. Detta fält är obligatoriskt.

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



Tips!

Summa donerade medel krävs för typen "Donation".
Summa insamlade medel krävs för typen "Insamling"

Belopp kan anges i lokal valuta genom att välja "Valuta" och ändra valuta.

21 Om du bläddrar vidare visas fler värden.

Service Account SA-052

Copy Delete

Total Funds Raised ⓘ Total Funds Raised (USD) ⓘ

0.00

Total Funds Donated ⓘ Total Funds Donated (USD) ⓘ

0.00

Organization Benefited ⓘ

Donation to LCIF ⓘ

Cancel Save

Example Club For Training Administration

Activity Level Project Type

Lions Club Activities in Strengthening Club

22 Fortsätt att bläddra.

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 Fortsätt att bläddra för att ange fler valfria detaljer om aktiviteten.

Additional Details

Signature Activity *i*

Funded by an LCIF Grant *i*

Venue *i*

Start Time *i*

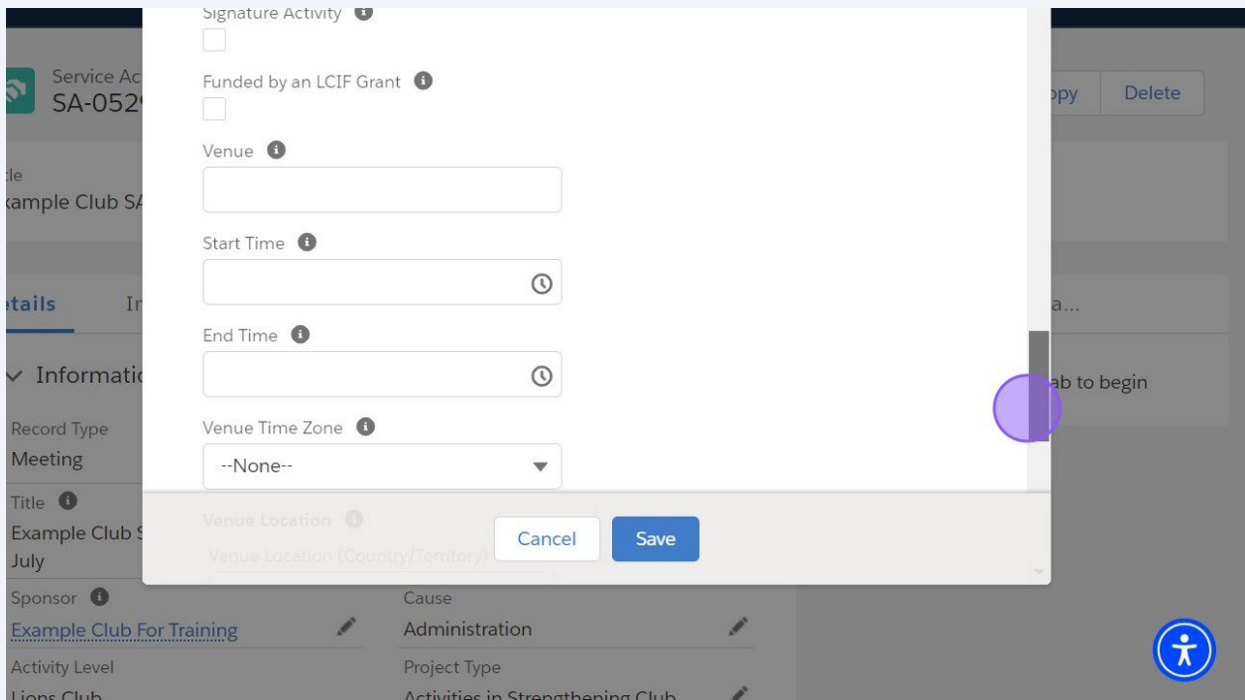
End Time *i*

Venue Time Zone *i*
--None--

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

Cancel Save

24 Klicka här (se markering nere till höger).



Signature Activity ⁱ

Funded by an LCIF Grant ⁱ

Venue ⁱ

Start Time ⁱ

End Time ⁱ

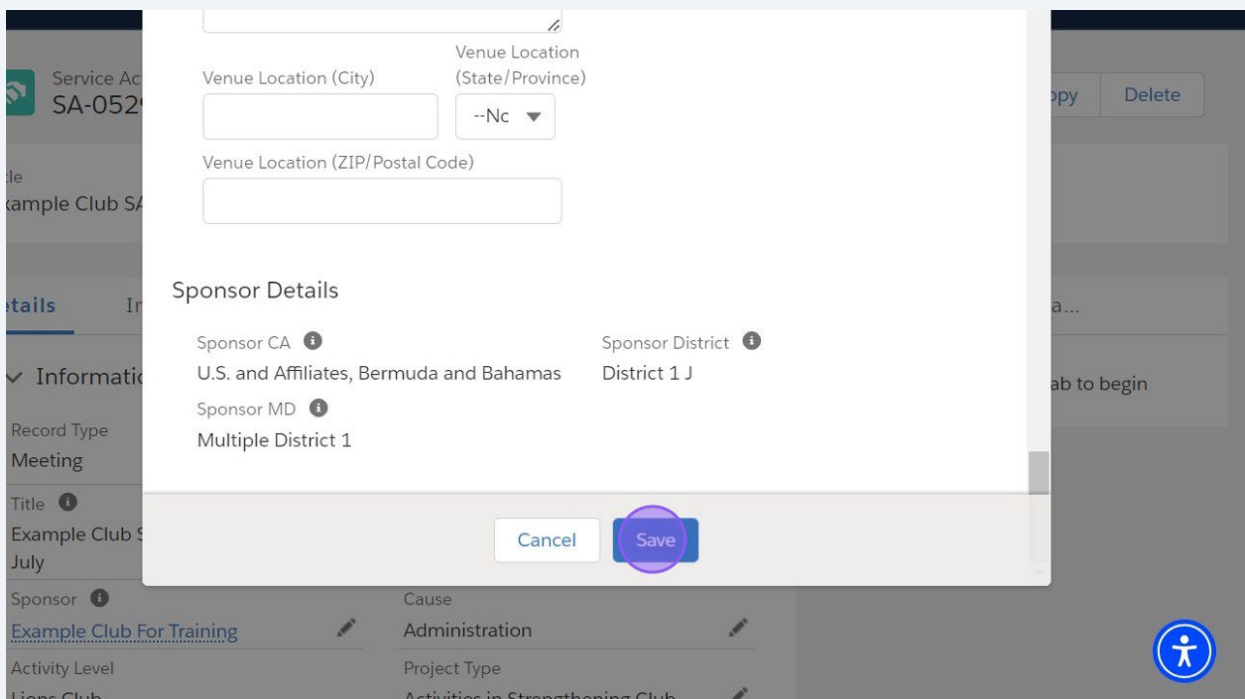
Venue Time Zone ⁱ
--None--

Venue Location ⁱ
Venue Location (Country/Territory)

Cancel Save

A purple circle highlights the bottom right corner of the modal, near the 'Save' button.

25 Klicka på "Spara" för att spara informationen.



Venue Location (City)

Venue Location (State/Province)

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

A purple circle highlights the 'Save' button at the bottom of the modal.

26

När den sparats visas ett grönt meddelande. Klicka på "X" för att stänga meddelandet.

The screenshot shows a web application interface. At the top, a dark blue navigation bar contains a search box and a user profile icon. Below this is a green notification banner with a checkmark icon and the text "Service Activity 'a29Nq00001k5LtIAI' was saved." A purple "X" icon is overlaid on the right side of the notification. The main content area has a dark blue header with navigation links: Home, Membership (with a dropdown arrow), Service (with a dropdown arrow), Learn, and More (with a dropdown arrow). Below the header, the main content area is light gray. It features a "Service Activity" header with the ID "SA-05292416" and three buttons: Edit, Copy, and Delete. Below this is a table with three columns: "Title", "Sponsor", and "Status". The "Title" column contains "Example Club SA1 - Club Meeting July", the "Sponsor" column contains "Example Club For Training" (a link), and the "Status" column contains "Ready to Report". Below the table, there are two tabs: "Details" (selected) and "Image Gallery". Under the "Details" tab, there is an "Information" section with a dropdown arrow. It contains two rows: "Record Type" with the value "Meeting" and a share icon, and "Report Complete" with a checkbox and an information icon. Below this is a "Title" field with an information icon and the value "Example Club SA1 - Club Meeting" and an edit icon. To the right of the "Details" tab, there is an "Image Gallery" section with a tab labeled "Image..." and a button labeled "Uploa...". Below this is a text box that says "Use the Upload Images tab to begin uploading images."



Tips! När slutdatumet för aktiviteten har passerats kommer statusen att ändras till "Redo att inrapportera".

27 Denna serviceaktivitet är "Redo att inrapportera".

The screenshot shows a web interface for a service activity. The 'Details' tab is active, displaying a form with the following fields:

- Record Type: Meeting
- Title: Example Club SA1 - Club Meeting July
- Sponsor: Example Club For Training
- Activity Level: Lions Club
- Status: Ready to Report (highlighted with a purple circle)
- 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

On the right, there is a 'Upload Images' section with a message: "Use the **Upload Images** tab to begin uploading images."

28 För att inrapportera att aktiviteten som slutförd klickar du på ikonen med en penna bredvid "Rapport slutförd".

The screenshot shows the same service activity details page as in slide 27. At the top, there is a header for 'Service Activity SA-05292416' with 'Edit', 'Copy', and 'Delete' buttons. Below the header, the activity title 'Example Club SA1 - Club Meeting July', sponsor 'Example Club For Training', and status 'Ready to Report' are displayed. The 'Details' tab is active, and the 'Report Complete' checkbox is now checked. A purple circle highlights a pencil icon next to the 'Report Complete' checkbox, indicating that clicking it will mark the activity as complete.

29 Klicka i fältet "Rapport slutförd".

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

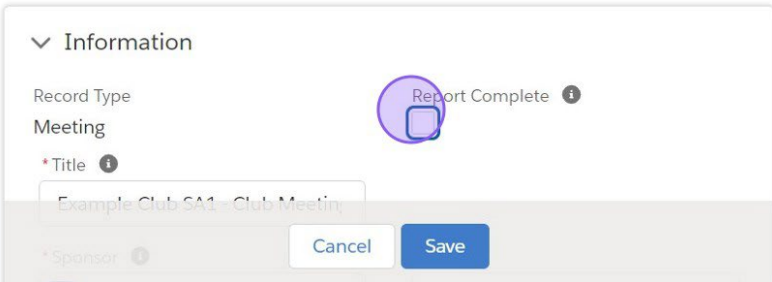
Use the **Upload Images** tab to begin uploading images.

Information

Record Type Meeting Report Complete ⓘ

* Title ⓘ Example Club SA1 - Club Meeting

* Sponsor ⓘ Cancel Save



30 Klicka på "Spara".

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

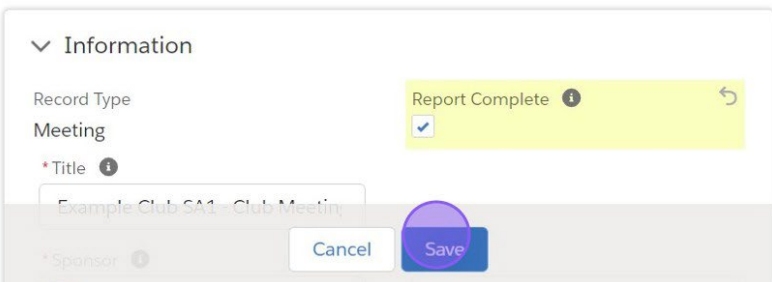
Use the **Upload Images** tab to begin uploading images.

Information

Record Type Meeting Report Complete ⓘ

* Title ⓘ Example Club SA1 - Club Meeting

* Sponsor ⓘ Cancel Save





Detta avslutar "Skapa och inrapportera en serviceaktivitet"

Kopiera en serviceaktivitet



Tips! Om detta är en återkommande aktivitet (av något slag) kan du spara tid i framtiden genom att lägga upp framtida aktiviteter nu!

31

Klicka på "Kopiera".

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

Image Gallery

Upload Images

Use the Upload Images tab to begin uploading images.



Tips! Du kommer till den nyskapade aktiviteten via knappen "Kopiera".

32

När kopieringen är klar visas ett grönt meddelande. Klicka på "X" för att stänga meddelandet.

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 box is displayed, containing a checkmark icon, the text "Success! Success! Here is your copied activity. Begin editing now.", and a close button (X) circled in purple. Below the navigation bar, the page title is "Service Activity SA-05292417" with "Edit", "Copy", and "Delete" buttons. The main content area shows a record with the following fields: "Title" (Example Club SA1 - Club Meeting July), "Sponsor" (Example Club For Training), and "Status" (Draft). Below this, there are tabs for "Details" and "Image Gallery". The "Details" tab is active, showing an "Information" section with "Record Type" (Meeting), "Report Complete" (checkbox), and "Title" (Example Club SA1 - Club Meeting). To the right, there is a "Image Gallery" section with "Image Gallery" and "Upload Images" tabs, and a message: "Use the Upload Images tab to begin uploading images."

33

Klicka på "Ändra".

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

34 Vi rekommenderar att du gör titeln unik! Klicka på fältet "Titel" för att ändra.

Information

* = Required Information

Record Type
Meeting

Report Complete

* Title

* Sponsor

Cause
Administration

Activity Level
Lions Club

Project Type
Activities in Strengthening Club

Cancel Save

35 Skriv "Aug".



Observera! Startdatum och slutdatum kopieras inte från aktiviteten. Dessa måste anges.

36 Klicka i fältet "*Startdatum" och ange datumet. Upprepa för "Slutdatum".

This field is calculated upon save

Status ⓘ
Draft
This field is calculated upon save

* Start Date ⓘ

M/d/yyyy

End Date ⓘ

M/d/yyyy

Required Metrics

Total Volunteers ⓘ

30

View all dependencies

Description ⓘ
Records the description of the activity

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

Cancel Save

37 Klicka på fältet "Totalt antal frivilliga".

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

38

Vid behov uppdatera "Totalt antal frivilliga" och "Totalt antal timmar" samt andra mätvärden.

The screenshot shows a modal window titled "Required Metrics" overlaid on a background form. The modal contains the following elements:

- A date field at the top with the value "07/07/2024" and a placeholder "M/d/yyyy".
- A section titled "Required Metrics" containing:
 - A field for "Total Volunteers" with the value "35".
 - Two checkboxes: "Non-Lions Participated" and "Non-Lion Family Members Participated", both currently unchecked.
 - A field for "Total Volunteer Hours" with the value "30".
- A section titled "Optional Metrics" with a field for "People Served".
- "Cancel" and "Save" buttons at the bottom right.

39

Bläddra tillbaka till toppen och klicka på fältet "Rapport slutförd".

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

- A search bar at the top right with the text "Search".
- A section titled "Information" with a legend "* = Required Information".
- Fields for:
 - "Record Type" (Meeting)
 - "* Title" (Example Club SA2 - Club Meeting At)
 - "* Sponsor" (Example Club For Training)
 - "Cause" (Administration)
 - "Activity Level" (Lions Club)
 - "Project Type" (Activities in Strengthening Club)
- A "Report Complete" checkbox, which is highlighted with a purple circle.
- "Cancel" and "Save" buttons at the bottom.

40 Klicka på "Spara".

The screenshot shows a modal dialog for saving a service activity. The dialog has a title "Information" and a legend "* = Required Information". The form fields are as follows:

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

At the bottom of the dialog are "Cancel" and "Save" buttons. The "Save" button is highlighted with a purple circle. A note at the bottom of the dialog says "This field is calculated upon save".

41 När den sparats visas ett grönt meddelande. Klicka på "X" för att stänga meddelandet. Din serviceaktivitet har inrapporterats.

The screenshot shows a service activity page with a green success message at the top: "Service Activity 'a29Nq000001k5NVIAY' was saved". The message has a close button (X) circled in purple. Below the message is a navigation bar with "Home", "Membership", "Service", "Learn", and "More". The main content area shows the service activity details:

- Service Activity: 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 För att återgå till klubbens detaljer klickar du på klubbnamnet eller på fliken "Detaljer".

The screenshot shows a web interface with a dark blue header containing a search bar and navigation links: Home, Membership, Service, Learn, and More. Below the header, there is a section for a 'Service Activity' with ID SA-05292417. The activity details include: Title: Example Club SA2 - Club Meeting Aug; Sponsor: [Example Club For Training](#) (circled in purple); Status: Reported. A modal window titled 'Example Club For Training' is open, displaying details such as Lion ID (200158), Type (Lions Club), Status (Active), and Billing Address (124 Any Place, Naperville, Illinois 60565, United States). The modal also has tabs for 'Details' and 'Image Gallery'.

43 Klicka på "Klubbens serviceaktiviteter" för att se de nyligen skapade serviceaktiviteterna.

The screenshot shows the 'Club Service Activities' page for 'Example Club For Training'. At the top, there is an 'Account' section with a '+ Follow' button. Below this is a summary table with the following data:

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

Below the table, there are tabs for 'Club Details', 'Data Export', 'Club Statements', 'Club Service Activities' (circled in purple), and 'More'. The 'Club Service Activities' tab is active, showing a list of activity details on the left and management buttons on the right:

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

Management buttons include: Manage Club Members, Manage Club Officers, and Manage Club Club.

44 Listan "Serviceaktiviteter" visas.

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 Klicka på "Hem" för att återgå till startsidan.

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 |
|-------------------|--------------------|------------------|---|---------------------------|

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 |
|--|----------|-------|-----------------|------------|----|
|--|----------|-------|-----------------|------------|----|

Member ... Club Acti...

- Manage Club Members

46

Detta avslutar snabbvägledningen "Serviceaktiviteter - Skapa, inrapportera och kopiera samt möten".

Welcome Example One!

