

# Atividades de **Serviço** - Criar, Reportar, Copiar uma Atividade de Reunião



Este guia é essencial para quem deseja gerenciar com eficiência as atividades no Lion Portal. Ele oferece instruções passo a passo sobre como criar, reportar e copiar atividades de serviço, concentrando-se especificamente em reuniões, que agora têm suas próprias métricas de relatório. Seguindo este guia, os usuários podem simplificar o processo, garantindo a entrada precisa de dados e o acompanhamento eficaz dos esforços dos voluntários. Além disso, as dicas incluídas aprimoram a usabilidade, facilitando a navegação e o gerenciamento eficaz das atividades.



Dica! As atividades de reunião agora têm sua própria classificação para relatórios. As métricas para esse tipo de atividade estão agrupadas em "Reuniões".

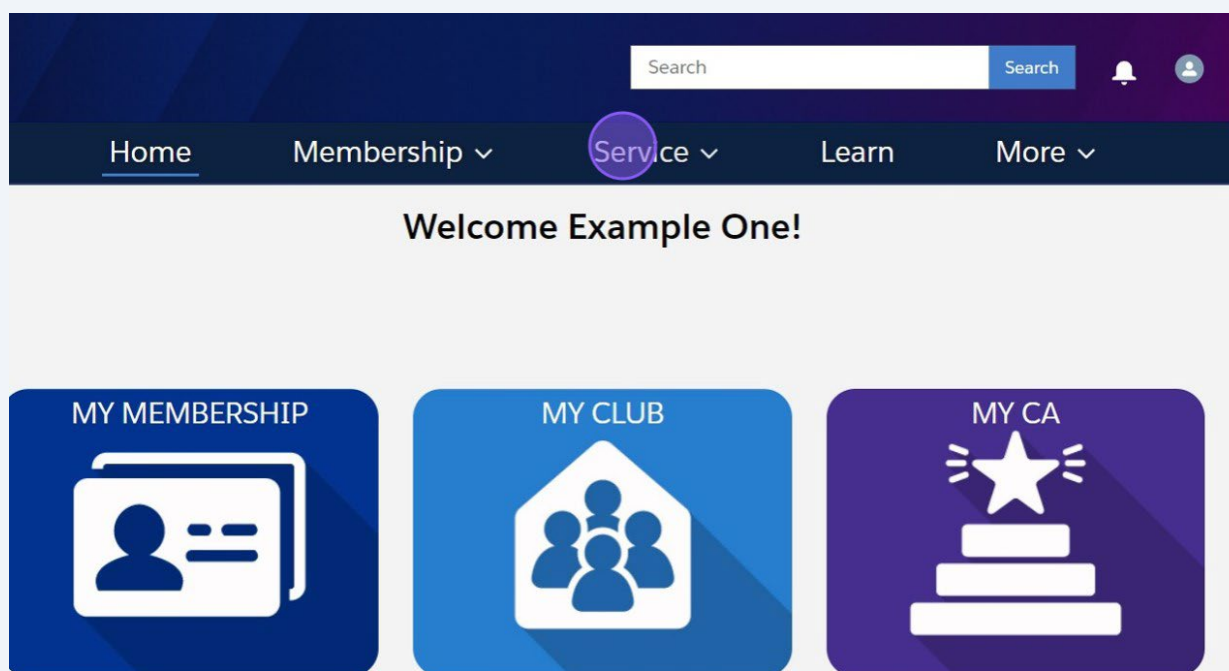
Este Guia Rápido aborda aspectos de criação, o relatório, cópia e o relatório da nova atividade para o tipo Atividade de Reunião.

1

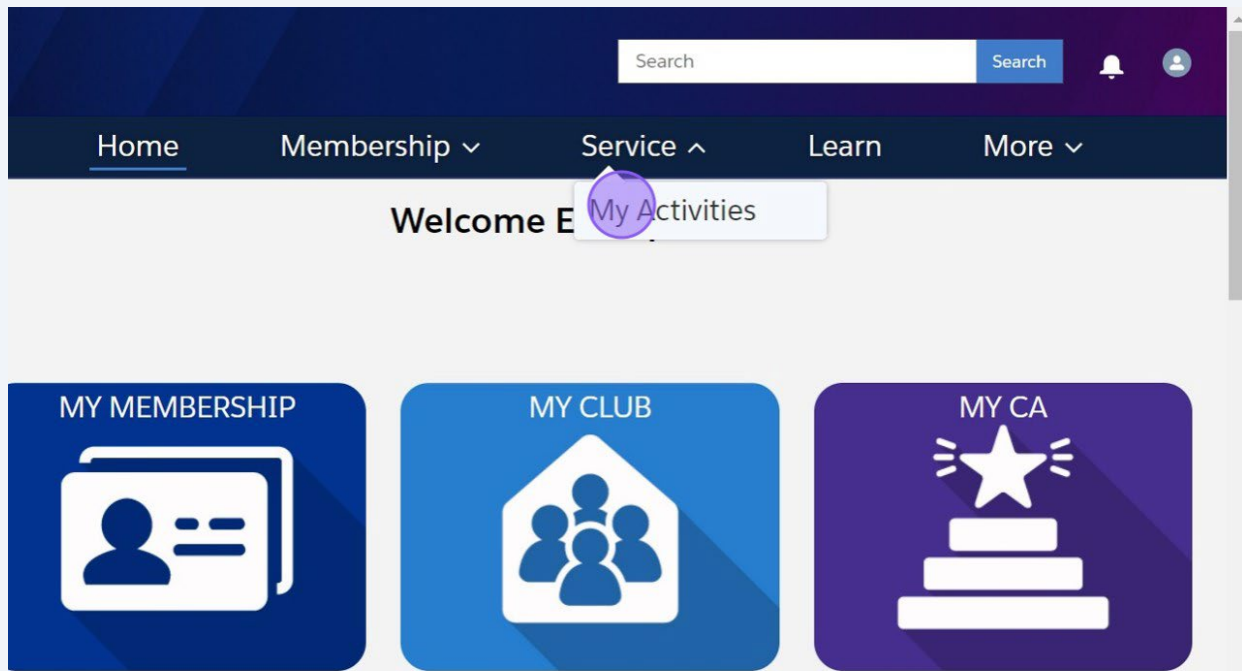
Faça login no Lion Portal [lionportal.org](https://lionportal.org)

2

Clique "Serviço"



3 Clique "Minhas Atividades"



Criar uma Atividade de Serviço

4

Clique em "Criar Atividade de Serviço"

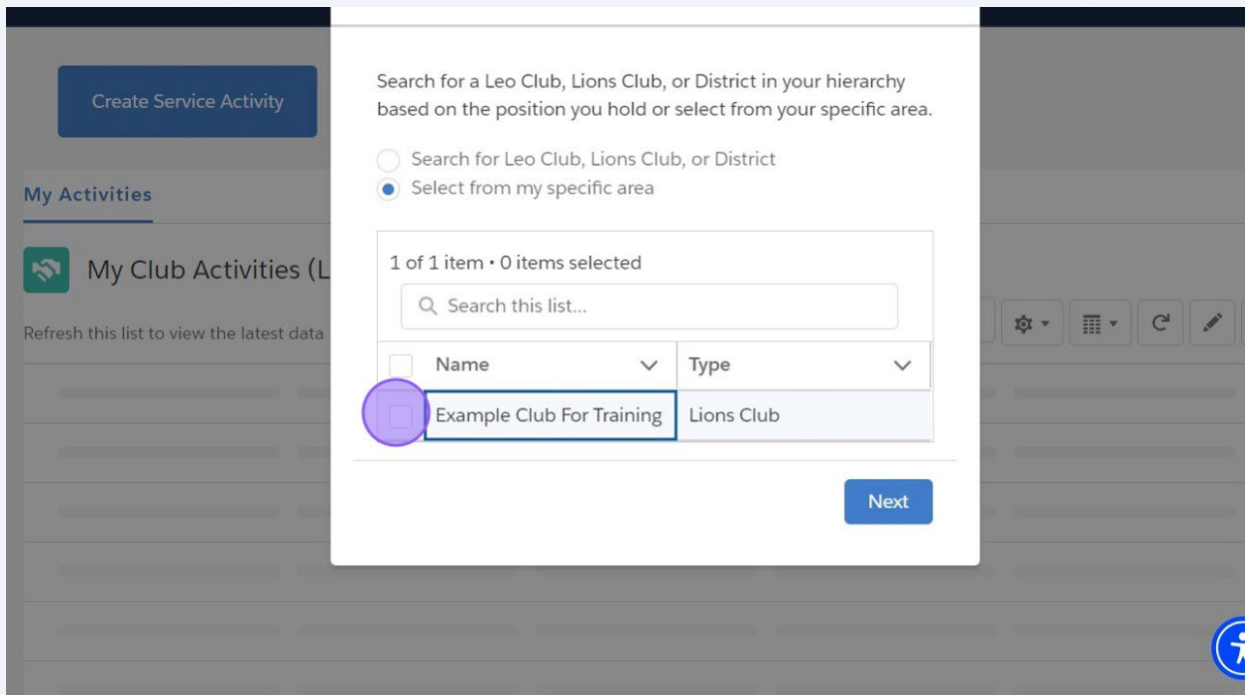
The screenshot displays a web application interface. At the top, there is a dark blue navigation bar with a search box on the right containing the text 'Search' and a blue 'Search' button. To the right of the search box are a notification bell icon and a user profile icon. Below the navigation bar, the 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. A prominent blue button with rounded corners and a white border is labeled 'Create Service Activity', with a purple circle highlighting the text. Below this button is a section titled 'My Activities' with a blue underline. Underneath, there is a green icon of two hands shaking, followed by the text 'My Club Activities (Last 3 Months)' and a dropdown arrow. Below this text is a search box with the placeholder 'Search this list...' and a magnifying glass icon. To the right of the search box are icons for settings, a grid view, a refresh button, an edit button, and a filter button. Below these elements is a table with three rows of placeholder text represented by horizontal lines.



Dica! São exibidas opções para navegar até o Leo, Lion ou distritos adicionais que você também pode ter permissões para gerenciar as Atividades de Serviço deles.

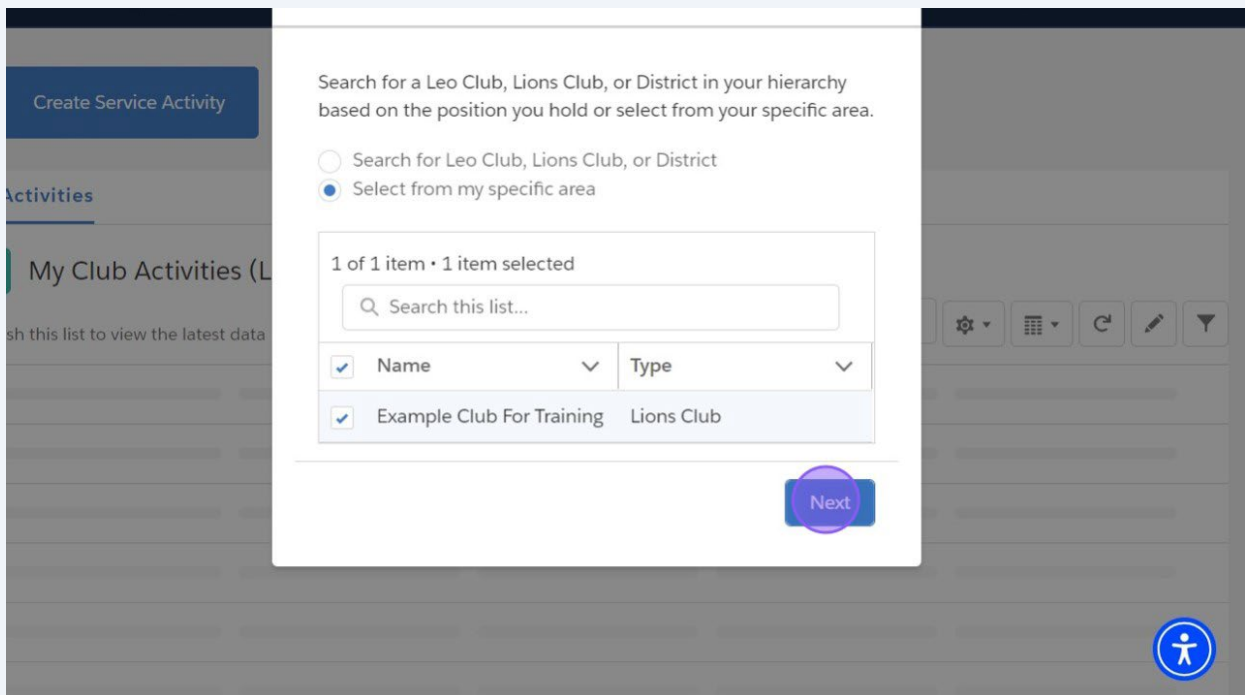
5

Para criar uma Atividade de Serviço para o seu clube, clique no botão de opção ao lado do nome do clube.



6

Clique “Próximo”



7

Insira um título para a Atividade de Serviço



Dica! Cada tipo de Atividade de Serviço tem diferentes campos de dados obrigatórios. Os tipos de Atividade de Serviço são:

- Projetos de Serviço
- Angariação de Fundos
- Doação
- Reunião

8

Clique nessa lista suspensa. Selecione o tipo de Atividade de Serviço

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

Signat... 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

Este exemplo é uma Atividade de Serviço do tipo Reunião, clique em "Próximo"

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

Uma nova Atividade de Serviço é criada. Para começar a editar a atividade, clique em um ícone de lápis ou no botão "editar" no canto superior direito.

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

Title ⓘ  
Example Club SA1 - Club Meeting July

Sponsor ⓘ  
[Example Club For Training](#)

Report Complete ⓘ

Cause  
Administration

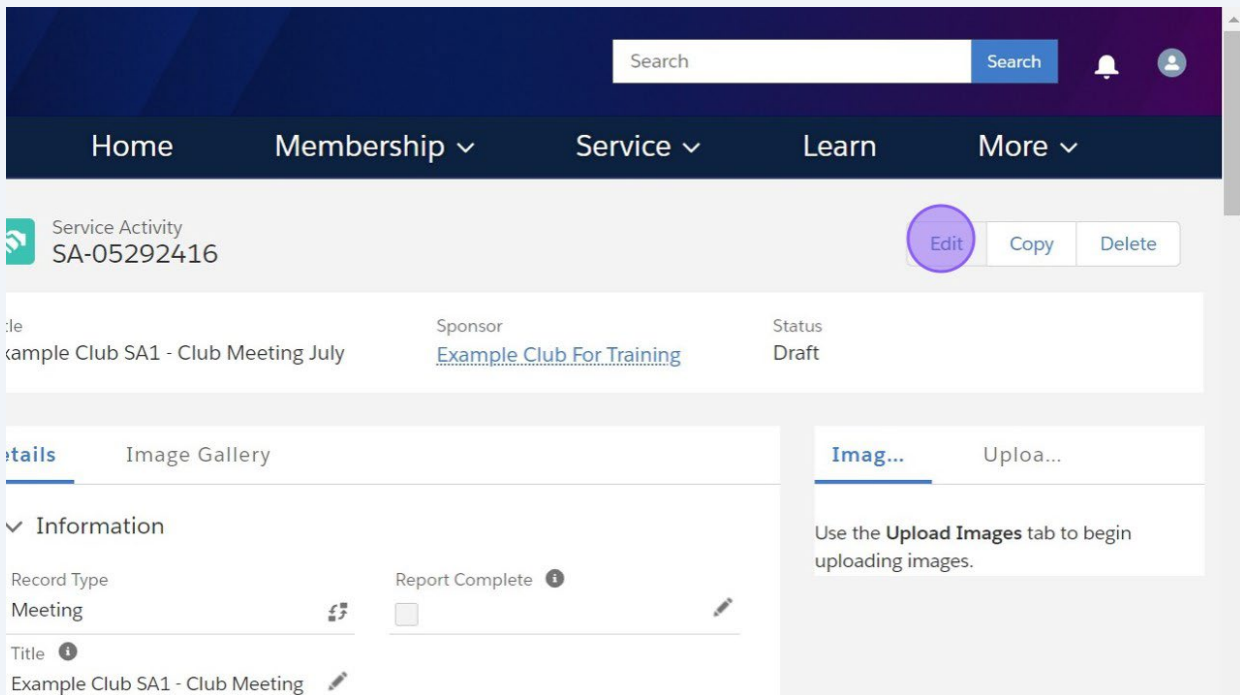
Project Type

Image Gallery

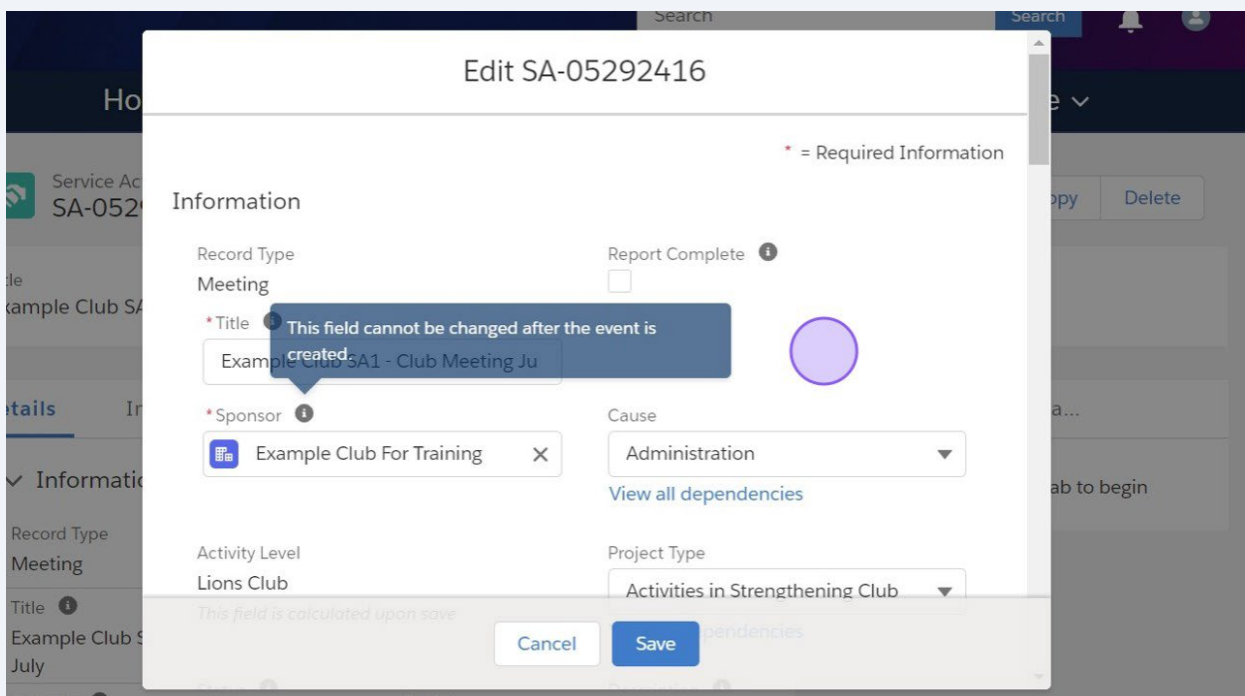
Imag... Uploa...

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

11 Se você clicar em "Editar", uma nova janela pop-up será aberta



12 Para inserir/atualizar dados, clique nos campos ou use a tecla "tab"



13 Você pode percorrer o formulário

The screenshot shows a form modal for creating a record. The fields are as follows:

- Record Type:** Meeting
- Title:** Example Club SA1 - Club Meeting Ju
- Sponsor:** Example Club For Training
- Cause:** Administration
- Project Type:** Activities in Strengthening Club
- Activity Level:** Lions Club (This field is calculated upon save)
- Status:** Draft (This field is calculated upon save)
- Description:** (This field is highlighted with a purple circle)

Buttons for "Cancel" and "Save" are visible at the bottom of the modal.

14 As Atividades de Serviço exigem uma descrição Clique no campo "Descrição" para inserir dados.

This screenshot is similar to the previous one, but the "Description" field is now highlighted with a purple circle and has a vertical cursor inside it, indicating it is the active field for data entry. The "Created By" field now shows "Example One, 9/15/2024, 6:21 PM".

15 Clique no campo "\*Data de Início". Digite a data usando o formato MM/DD/YYYY

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

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

Buttons: Cancel, Save

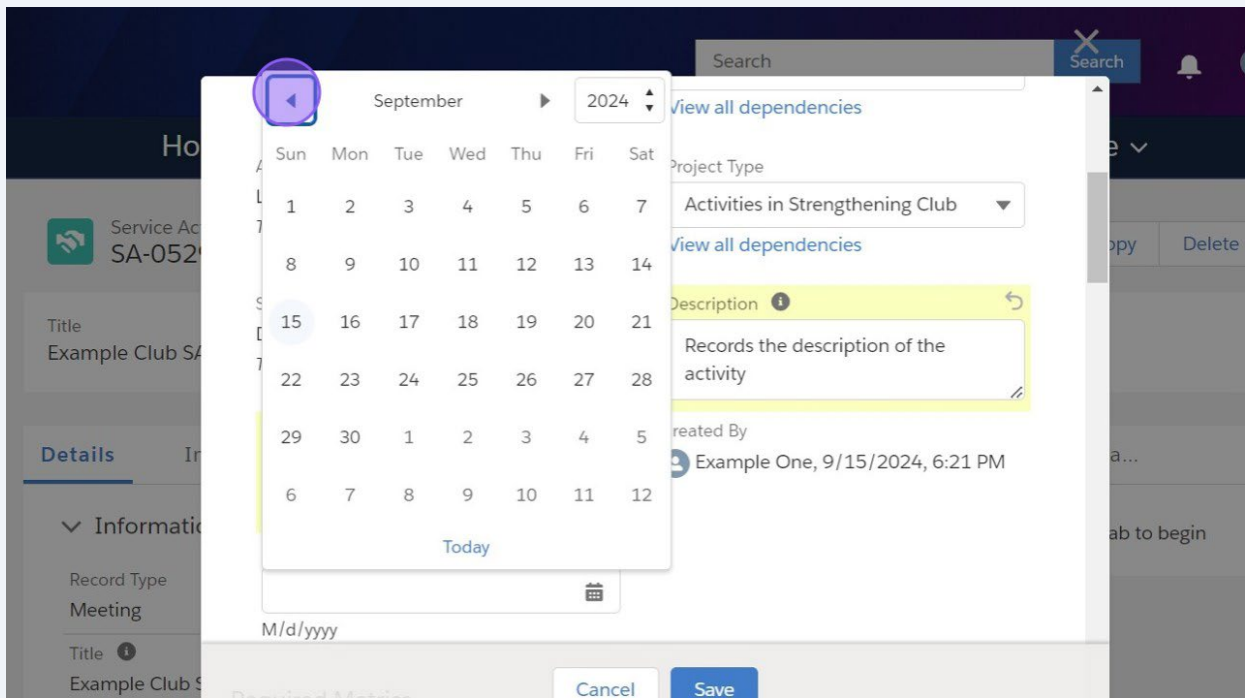
16 Clique no campo "Data de Término".

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

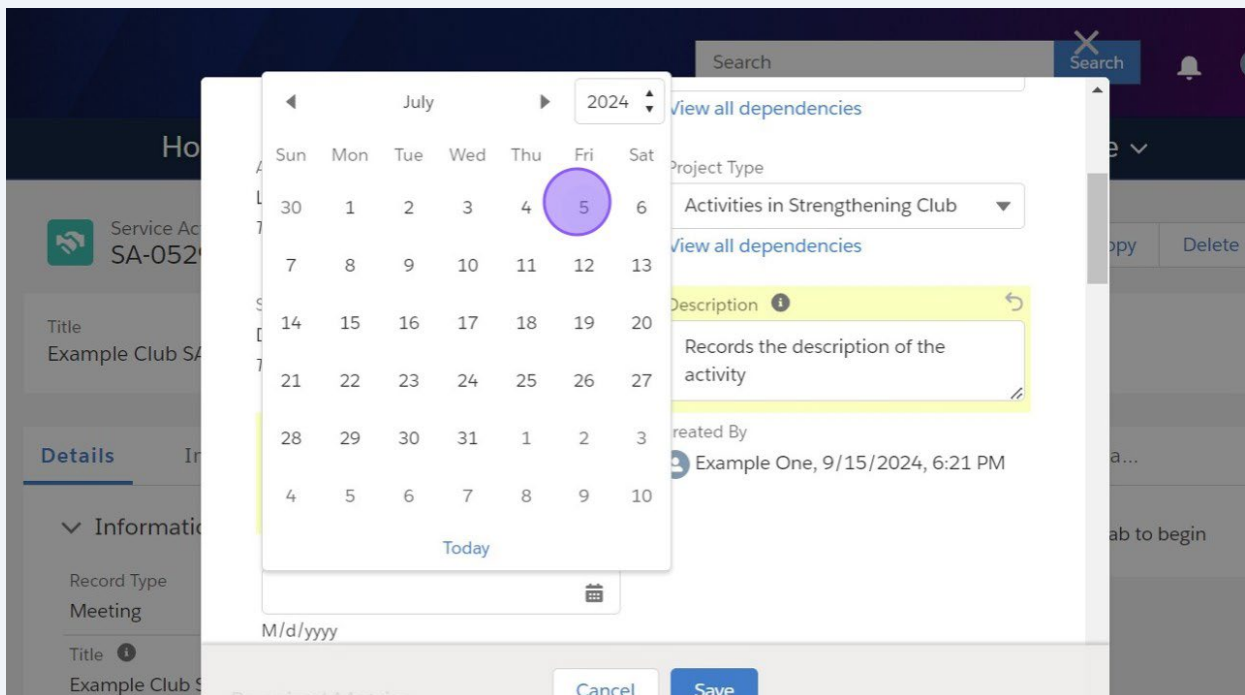
- \*Start Date: 7/5/2024 (Highlighted with a yellow box)
- End Date: (Empty field, highlighted with a purple circle)

Buttons: Cancel, Save

17 Clique no ícone do calendário para selecionar uma data em um calendário



18 Clique na data



19 Clique no campo "Total de Voluntários" para inserir os dados

The screenshot shows a meeting form with a modal window for editing. The 'End Date' field is highlighted in yellow and contains '7/5/2024'. Below it, the 'Required Metrics' section is visible. The 'Total Volunteers' field is highlighted with a purple circle and is currently empty. Other fields include 'Non-Lions Participated', 'Non-Lion Family Members Participated', and 'Total Volunteer Hours'. The 'Optional Metrics' section is partially visible at the bottom. Buttons for 'Cancel' and 'Save' are at the bottom right.

20 Clique no campo "Total de Horas de Voluntariado" para inserir as horas. Este é um campo obrigatório

The screenshot shows the same meeting form modal window. The 'Total Volunteers' field now contains the number '30' and is highlighted in yellow. The 'Total Volunteer Hours' field is highlighted with a purple circle and is currently empty. The 'Optional Metrics' section is now more visible, showing the 'People Served' field. The 'Currency' field is set to 'USD - U.S. Dollar'. Buttons for 'Cancel' and 'Save' are at the bottom right.



### Dica!

O Total de Fundos Doados é obrigatório para o Tipo de Atividade de Serviço de "Doação"

O Total de Fundos Angariados é obrigatório para o Tipo de Atividade de Serviço de "Angariação de Fundos"

Os fundos podem ser inseridos na moeda local selecionando "Moeda" e alterando o tipo de moeda.

21

Ao rolar a tela, mais métricas são exibidas.

Service Ac  
SA-052

Copy Delete

Currency  
USD - U.S. Dollar

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

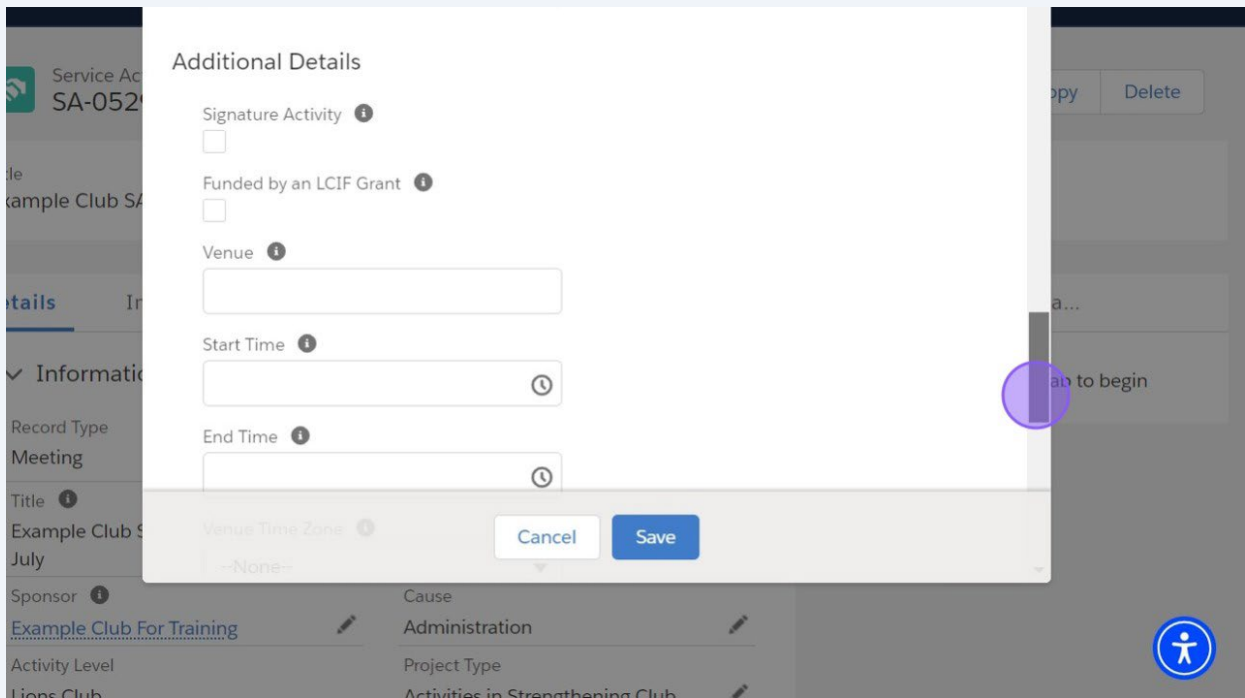
Example Club For Training Administration  
Activity Level Project Type  
Lions Club Activities in Strengthening Club

ab to begin

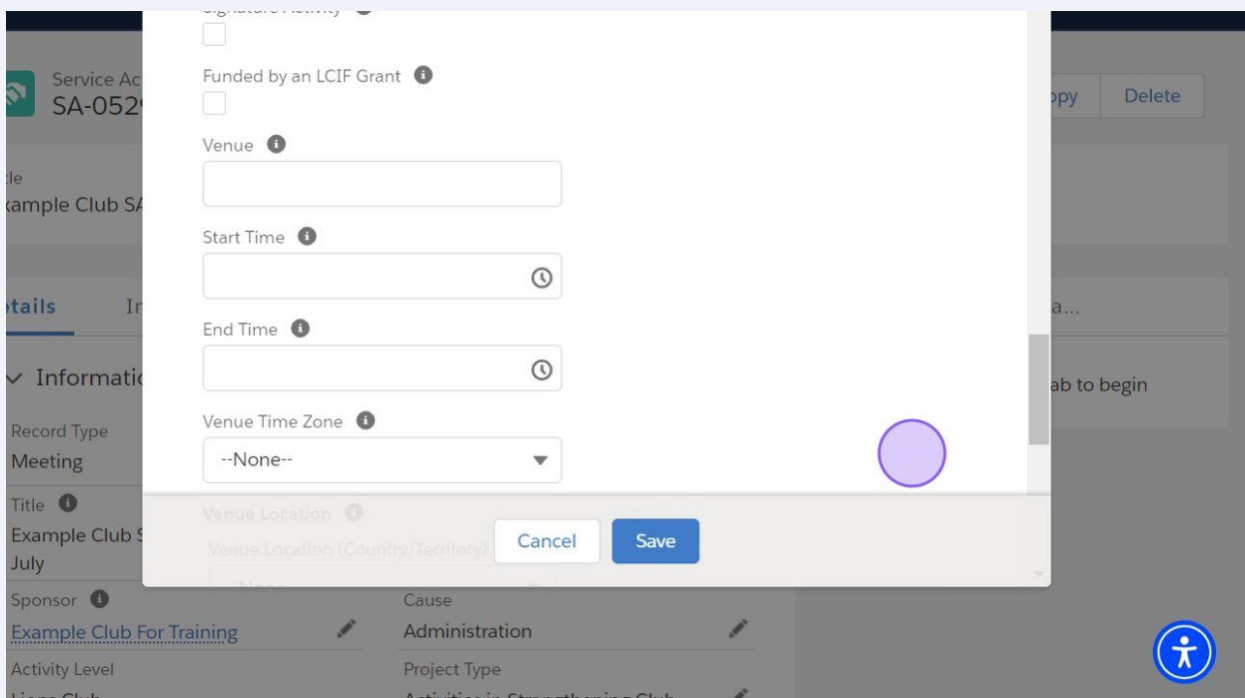
ab to begin

ⓘ

22 Continue a rolar a tela



23 Continue a rolar a tela para inserir mais detalhes opcionais sobre a atividade



24 Clique aqui.

A screenshot of a web application showing a modal form for editing an activity. The modal is centered over a blurred background of a table with columns for 'Sponsor', 'Cause', and 'Project Type'. The modal contains the following fields:

- Signature Activity:
- Funded by an LCIF Grant:
- Venue:
- Start Time:
- End Time:
- Venue Time Zone:
- Venue Location (Country/Territory):

At the bottom of the modal are 'Cancel' and 'Save' buttons. A purple circle highlights the right edge of the modal.

25 Clique em "Salvar" para salvar os dados inseridos

A screenshot of the same web application modal, now showing the 'Sponsor Details' section. The 'Venue Location' section is partially visible at the top. The 'Sponsor Details' section includes:

- Sponsor CA: U.S. and Affiliates, Bermuda and Bahamas
- Sponsor District: District 1 J
- Sponsor MD: Multiple District 1

At the bottom of the modal, the 'Save' button is highlighted with a purple circle.

26

Depois de ser salvo, uma mensagem verde de "Sucesso!" será exibida. Clique no ícone "X" para fechar a mensagem.

The screenshot displays a Microsoft Dynamics 365 interface. At the top, a green notification bar states "Service Activity 'a29Nq00001k5LtIAI' was saved." with a close button (X). Below this is a navigation bar with "Home", "Membership", "Service", "Learn", and "More". 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 "Edit", "Copy", and "Delete" buttons. Below the record, there are tabs for "Details" and "Image Gallery". The "Details" tab is active, showing an "Information" section with "Record Type: Meeting" and "Report Complete" checkbox. The "Image Gallery" tab is also visible, with a sub-tab "Upload Images" and a message: "Use the Upload Images tab to begin uploading images."



Dica! Quando a data de término da atividade tiver passado, o status será definido como "Pronto para Reportar".

27 Essa atividade de serviço está "Pronta para Reportar"

**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 reportar a conclusão da atividade. Clique no ícone de lápis ao lado de "Relatório Concluído"

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 Clique no campo "Relatório Concluído".

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

\* = Required Information

Information

Record Type Meeting

\*Title  Report Complete

Example Club SA1 - Club Meeting

\*Sponsor

Cancel Save

Imag... Uploa...

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

30 Clique "Salvar"

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

\* = Required Information

Information

Record Type Meeting

\*Title  Report Complete

Example Club SA1 - Club Meeting

\*Sponsor

Cancel Save

Imag... Uploa...

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



Isso conclui Criar e Reportar uma Atividade de Serviço

## Copiar uma Atividade de Serviço



Dica! Se essa for uma atividade recorrente (de qualquer tipo), a configuração de atividades futuras agora pode economizar tempo no futuro!

31

Clique "Copiar"

The screenshot shows the Microsoft Dynamics 365 interface for a Service Activity. At the top, there is a search bar and navigation tabs for Home, Membership, Service, Learn, and More. Below the navigation, the Service Activity details for SA-05292416 are displayed. The 'Copy' button is highlighted with a purple circle. The activity details include the title 'Example Club SA1 - Club Meeting July', the sponsor 'Example Club For Training', and the status 'Reported'. Below the details, there is an 'Information' section with fields for Record Type (Meeting), Title (Example Club SA1 - Club Meeting), and Report Complete (checked). To the right, there is an 'Image Gallery' section with an 'Upload Images' button and a message: 'Use the Upload Images tab to begin uploading images.'



Dica! Você é levado à atividade recém-criada pelo botão Copiar.

32

Depois de ser copiado, uma mensagem verde de "Sucesso!" será exibida. Clique no ícone "X" para fechar a mensagem.

The screenshot shows a web interface with a dark blue header. At the top, a green success message reads: "Success! Success! Here is your copied activity. Begin editing now." with a close button (X) circled in purple. Below the header is a navigation bar 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, 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 an "Image Gallery" section with an "Upload Images" button and a message: "Use the Upload Images tab to begin uploading images."

33

Clique "Editar"

This screenshot is identical to the previous one, 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 Recomenda-se que o título seja único! Clique "Título" para editar

Information

\* = Required Information

Record Type  
Meeting

Report Complete

\*Title  
Example Club SA1 - Club Meeting Ju

\*Sponsor  
Example Club For Training

Cause  
Administration

Activity Level  
Lions Club

Project Type  
Activities in Strengthening Club

Cancel Save

35 Digite "Aug"



Alerta! As datas de início e término não são copiadas da atividade. Elas precisam ser inseridas.

36 Clique no campo "\*Data de Início" e digite a data. Repita o procedimento para a "Data de Término"

This field is calculated upon save

Status ⓘ  
Draft  
This field is calculated upon save

Description ⓘ  
Records the description of the activity

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

\*Start Date ⓘ  
|    
M/d/yyyy

End Date ⓘ  
   
M/d/yyyy

Required Metrics

Total Volunteers ⓘ  
30

Cancel Save

37 Clique no campo "Total de Voluntários".

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

Se necessário, atualize o "Total de Voluntários" e o "Total de Horas de Voluntariado" e quaisquer outras métricas

The screenshot shows a modal window titled "Required Metrics" overlaid on a form. The form 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, there is an "Optional Metrics" section with a "People Served" field. At the bottom of the modal, there are "Cancel" and "Save" buttons.

39

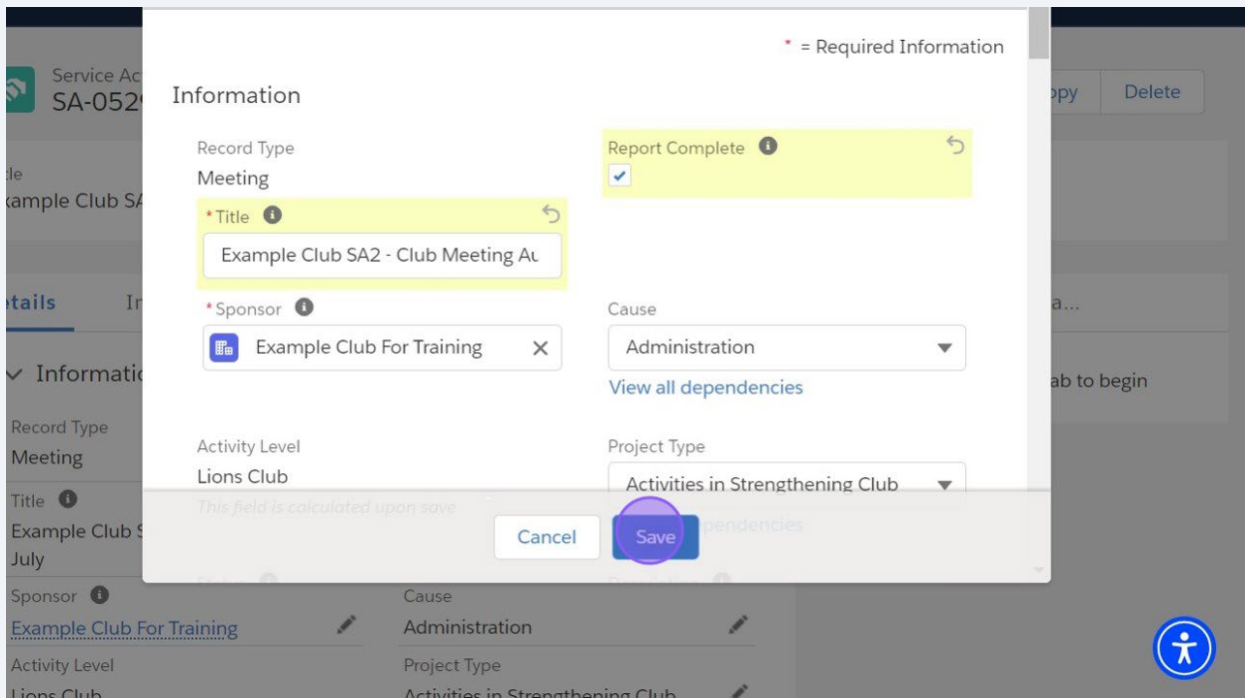
Role de volta para a parte superior e Clique no campo "Relatório Concluído".

The screenshot shows a modal window titled "Edit SA-05292417" with the following fields:

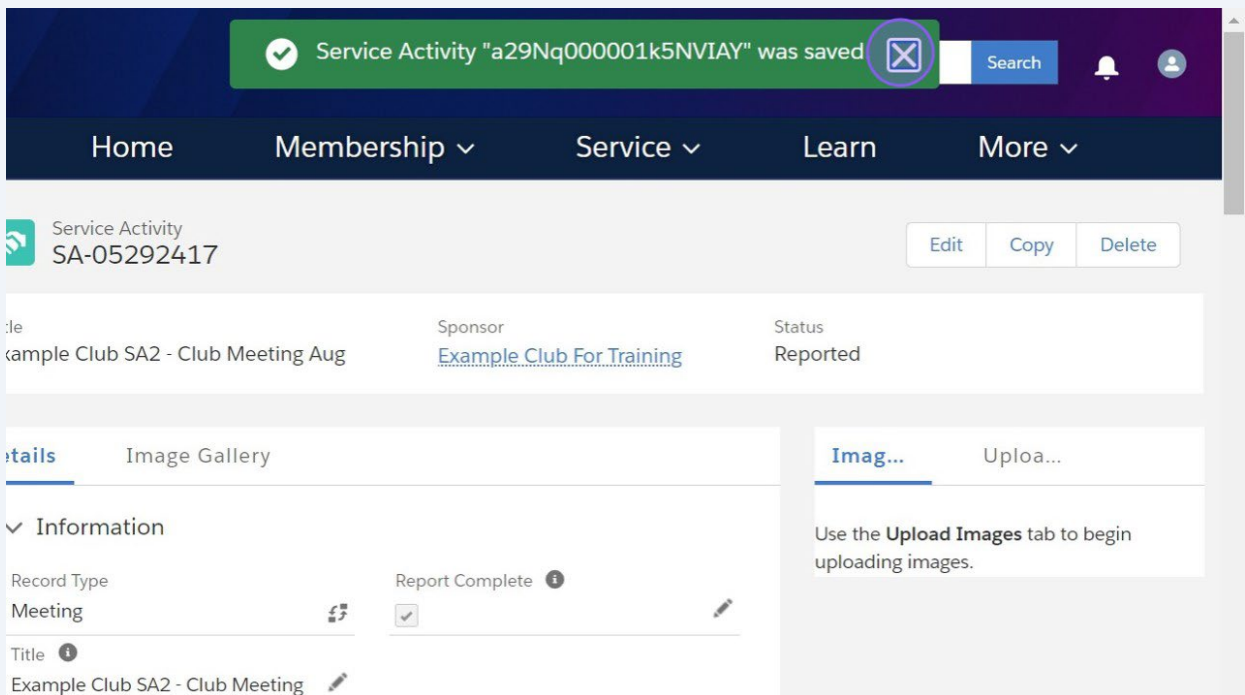
- Record Type**: Meeting
- \* Title**: Example Club SA2 - Club Meeting At
- \* Sponsor**: Example Club For Training
- Cause**: Administration
- Project Type**: Activities in Strengthening Club

A "Report Complete" button with a square icon is highlighted with a purple circle. At the bottom, there are "Cancel" and "Save" buttons. A note at the bottom left states "This field is calculated upon save".

40 Clique "Salvar"



41 Depois de ser salvo, uma mensagem verde de "Sucesso!" será exibida. Clique no ícone "X" para fechar a mensagem. Sua Atividade de Serviço foi reportada.



42 Para voltar aos detalhes do Clube, clique no Nome do Clube ou na guia "Detalhes"

Service Activity  
SA-05292417

Edit Copy Delete

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

Lion ID 200158 Type Lions Club

Status Active Billing Address 124 Any Place Naperville, Illinois 60565 United States

43 Clique "Atividades de Serviço do Clube" para visualizar as Atividades de Serviço recém-criadas.

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 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

Manage Club Members

Manage Club Officers

Manage Cub Club

44 A lista Atividades de Serviço é exibida

The screenshot shows the 'Club Service Activities' page. At the top, there are navigation tabs: 'Club Details', 'Data Export', 'Club Statements', 'Club Service Activities' (selected), and 'More'. Below the tabs, there is a header for 'Service Activities (2)' with a settings icon and a refresh icon. It indicates '2 items · Updated a minute ago'. A table lists the activities:

	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	✓

Below the table is a 'View All' link. To the right, a sidebar contains several blue buttons: 'Manage Club Members', 'Manage Club Officers', 'Manage Cub Club Leader', 'Manage Delegates', and 'View Delegates'. A Facebook icon is visible at the bottom right of the sidebar.

45 Clique na "Página Inicial" para retornar à página inicial.

The screenshot shows the main navigation menu and account information. The navigation bar includes a search box, a search button, a notification bell, and a user profile icon. The menu items are: 'Home' (circled in purple), 'Membership', 'Service', 'Learn', and 'More'. Below the navigation bar, there is an 'Account' section for 'Example Club For Training' with a '+ Follow' button. The account details are as follows:

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

Below the account details, there is a secondary navigation bar with tabs: 'Club Details', 'Data Export', 'Club Statements', 'Club Service Activities' (selected), and 'More'. This secondary bar also shows the 'Service Activities (2)' table and the 'Manage Club Members' button from the previous screenshot.

46

## 24 Isso conclui o Guia Rápido "Atividades de Serviço - Criar, Reportar, Copiar uma Atividade de Reunião"

Welcome Example One!

