Service Activities - Copy A Service Activity

This guide provides a straightforward method for copying a Service Activity in the Lion Portal, making it easier to replicate and manage your service initiatives. It outlines important details such as the automatic draft status and the need to update key information like dates and titles, ensuring users can efficiently customize the copied activity. By following the steps in this guide, users can streamline their service activity management while being aware of critical limitations, such as the absence of images in the copied entries. Overall, this resource is essential for anyone looking to enhance their productivity and organization in managing service activities.

ⓘ Tip! This guide will show you how to copy a Service Activity.

When an activity is copied:

Note 1: the status is set to "Draft", all dates are set to blank, reported is unchecked, images from the activity are not copied. These will need to be completed to report the activity.

Note 2: Data in the metrics, and other reporting data points are copied. These can be accepted or changed for the new activity.

Note 3: Images are not copied to the new activity.

1　Sign into the Lion Portal **lionportal.org**

Locate The Activity To Copy

ⓘ Tip! There are two paths to locate the activity to copy:

• From Service > My Activities in the top navigation bar
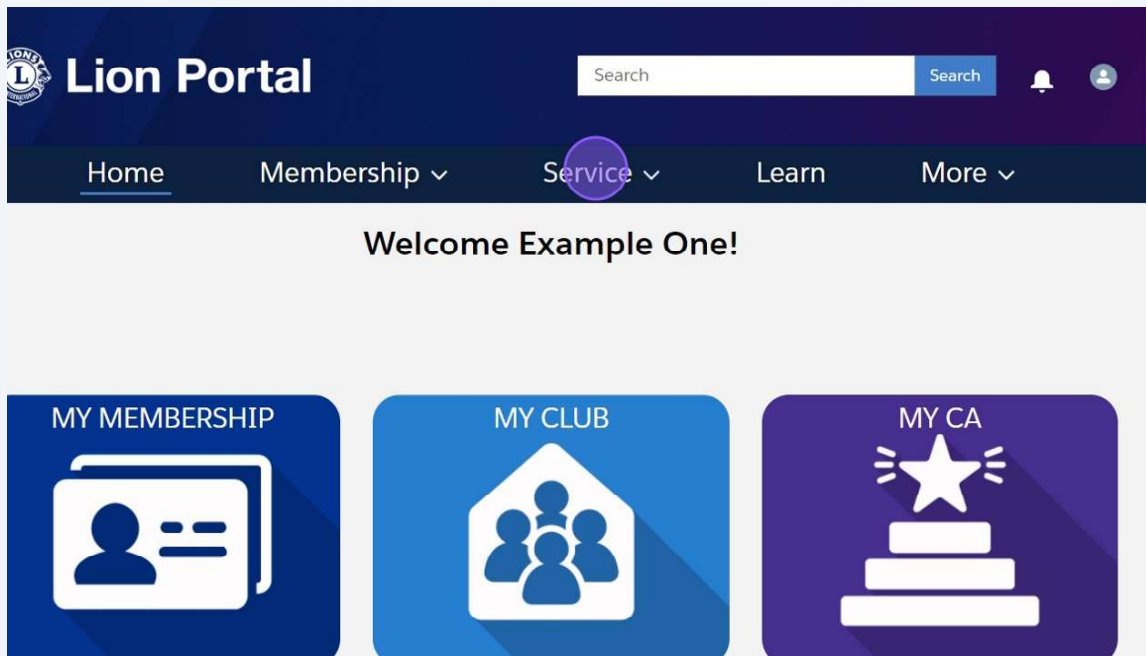
• From My Club > Club Service Activities Tab
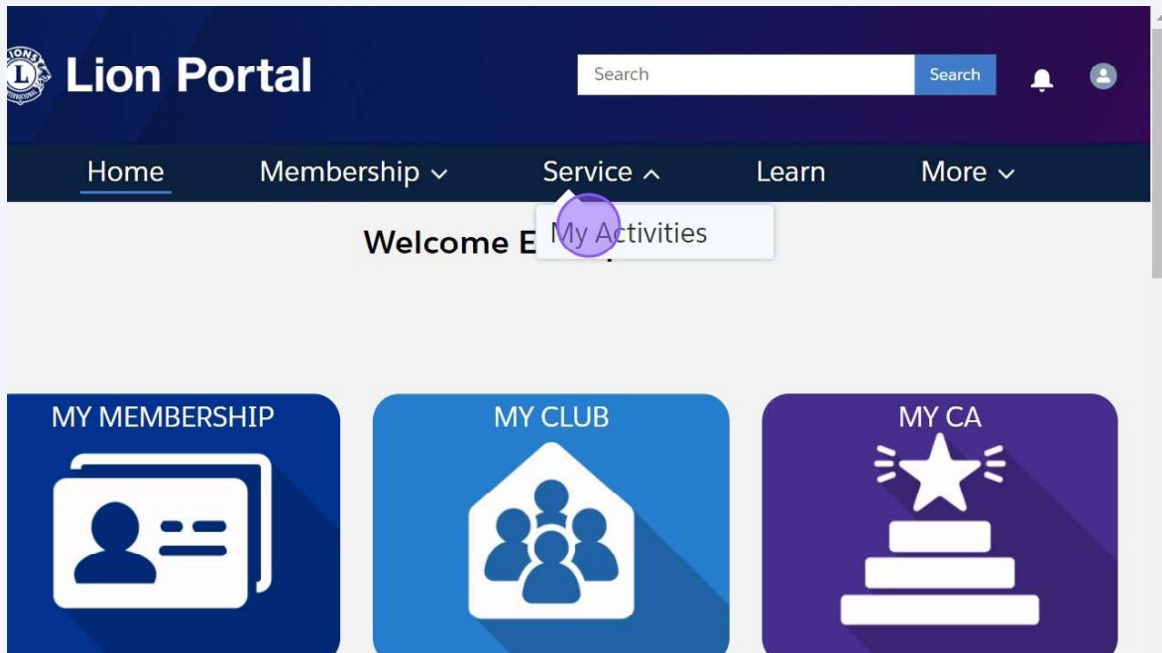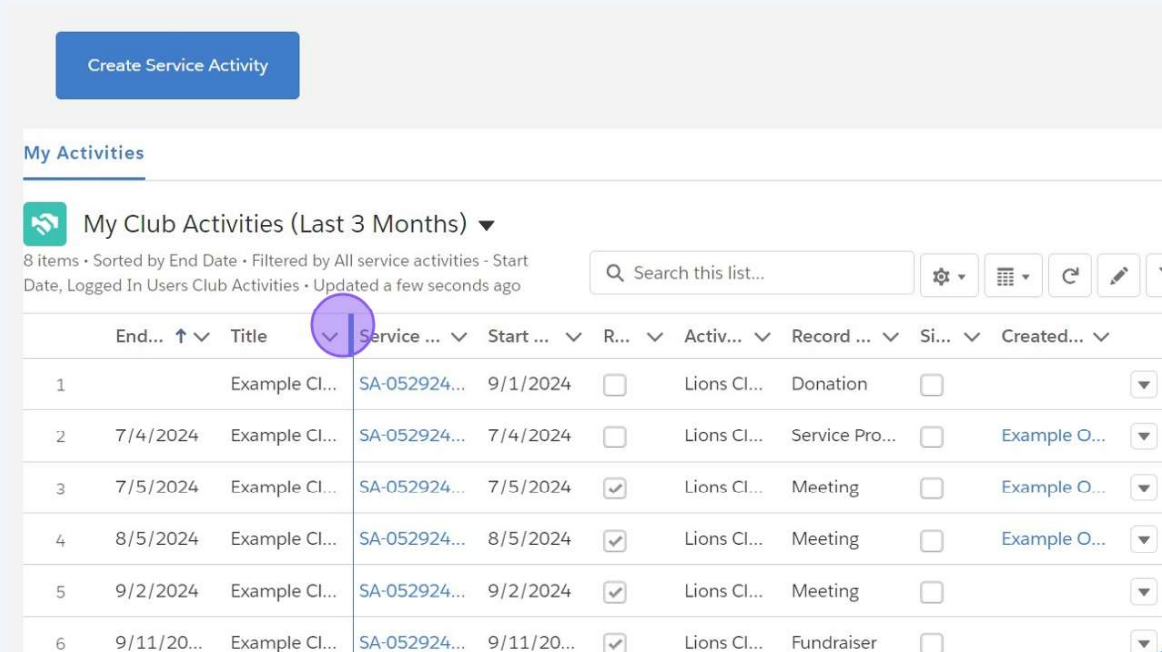
Both are shown

2 Click "Service"

3   Click "My Activities"

4   The list of "My Club Activities (Last 3 Months) is the default view click the down arrow next to the view title to change to a different list view.

5   Click the link to the Service Activity you wish to copy.

My Activities

My Club Activities (Last 3 Months) ▼

8 items • Sorted by End Date • Filtered by All service activities - Start Date, Logged In Users Club Activities • Updated a few seconds ago

	End... ↑ ∨	Title ∨	Service ... ∨	Start ... ∨	R... ∨	Activ... ∨	Record ... ∨	Si... ∨	Created... ∨
1		Example Club SA6...	SA-052924...	9/1/2024	☐	Lions Cl...	Donation	☐	
2	7/4/2024	Example Club SA7...	SA-052924...	7/4/2024	☐	Lions Cl...	Service Pro...	☐	Example O...
3	7/5/2024	Example Club SA1...	SA-052924...	7/5/2024	☑	Lions Cl...	Meeting	☐	Example O...
4	8/5/2024	Example Club SA2...	SA-052924...	8/5/2024	☑	Lions Cl...	Meeting	☐	Example O...
5	9/2/2024	Example Club SA2...	SA-052924...	9/2/2024	☑	Lions Cl...	Meeting	☐	
6	9/11/20...	Example Club SA5...	SA-052924...	9/11/20...	☑	Lions Cl...	Fundraiser	☐	
7	9/15/20...	Example Club SA3...	SA-052924...	9/15/20...	☑	Lions Cl...	Service Pro...	☑	

6   The activity will open, Click "Copy" to begin the process.

Lion Portal

Search   Search

Home   Membership ∨   Service ∨   Learn   More ∨

Service Activity
SA-05292423

Edit   Copy   Delete

:le
xample Club SA7 - Service Project Surfing

Sponsor
Example Club For Training

Status
Ready to Report

:tails   Image Gallery

Imag...   Uploa...

∨ Information
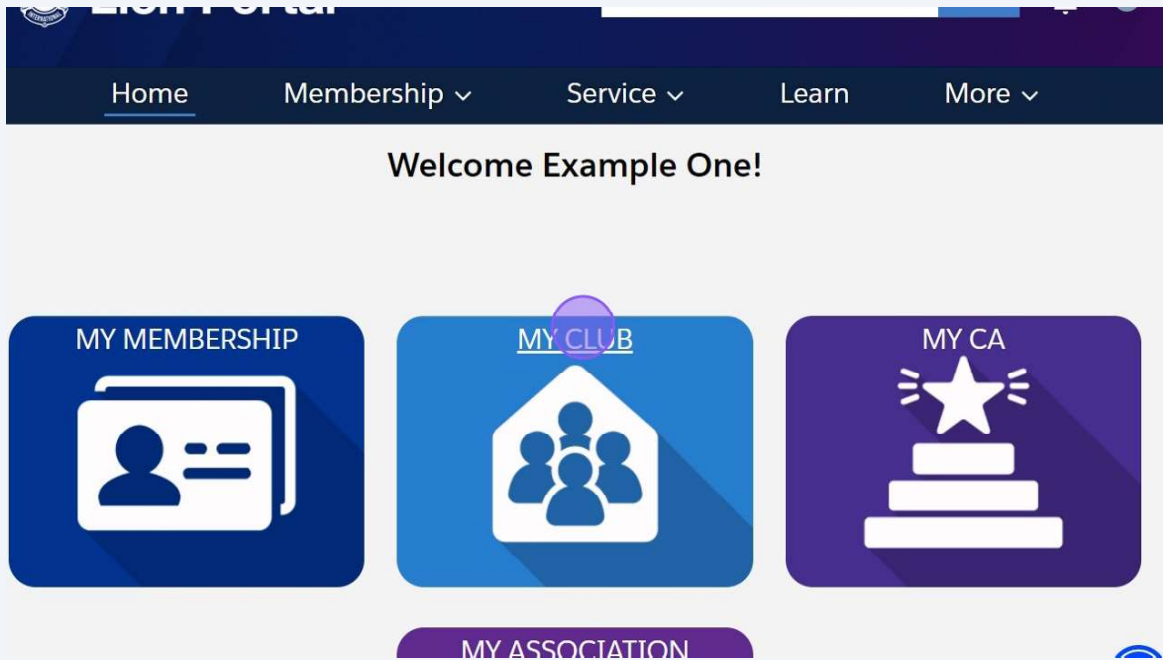
Record Type
Service Project

Report Complete ⓘ
☐

Title ⓘ

7   Click "MY CLUB"

8   Click "Club Service Activities" tab

Home	Membership ⌄	Service ⌄	Learn	More ⌄

Account
Example Club For Training   + Follow

Lion ID	Type	Status	Billing Address	Active Member Count
200158	Lions Club	Active	124 Any Place Naperville, Illinois 60565 United States	56

Club Details   Data Export   Club Statements   Club Service Activities   More   Member ...   Club Acti...

Account Name		Type ⓘ
Example Club For Training ✎		Lions Club
Parent Account ⓘ		Active Member Count
District 1 J		56
Region or Zone ⓘ		Club Specialty ⓘ
SE Zone 1		Cultural
Lion ID ⓘ		Club Sub-Specialty ⓘ
200158		

Manage Club Members

Manage Club Officers

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9   The list of Club Service Activities is shown. Click the column header to sort the list by the selected column.

Lion ID	Type	Status	Billing Address	Active Member Count
200158	Lions Club	Active	124 Any Place Naperville, Illinois 60565 United States	56

Club Details   Data Export   **Club Service Activities**   More   Member ...   Club Acti...

📇 Service Activities (9)   ⚙ ⌄   ↻

9 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	☑
3	9/15/2024	Example Club ...	SA-05292418	9/15/2024	☑
4	9/17/2024	Example Club ...	SA-05292419	9/17/2024	☑
5	9/11/2024	Example Club ...	SA-05292420	9/11/2024	☑

Manage Club Members

Manage Club Officers

Manage Cub Club Leader

10 Click the link to the Service Activity you wish to copy.

	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	☑
3	9/15/2024	Example Club ...	SA-05292418	9/15/2024	☑
4	9/17/2024	Example Club ...	SA-05292419	9/17/2024	☑
5	9/11/2024	Example Club ...	SA-05292420	9/11/2024	☑
6		Example Club ...	SA-05292421	9/1/2024	☐
7	9/2/2024	Example Club ...	SA-05292422	9/2/2024	☑
8	7/4/2024	Example Club ...	SA-05292423	7/4/2024	☐

Service Activities (8)
8 items • Updated a few seconds ago

View All

Manage Club Members

Manage Club Officers

Manage Cub Club Leader

Manage Delegates

View Delegates

View Club Officers

11 Click here.

Lion Portal

Search   Search

Home   Membership ⌄   Service ⌄   Learn   More ⌄

Service Activity
SA-05292423

Edit   Copy   Delete

Title
xample Club SA7 - Service Project Surfing

Sponsor
Example Club For Training

Status
Ready to Report

Details   Image Gallery

Imag...   Uploa...

⌄ Information

Record Type
Service Project

Report Complete ⓘ
☐

Title ⓘ

12   The activity will open, Click "Copy" to begin the process.

Edit the Copied Activity

13   A green success message will show. Click this icon to close the message. The new activity is ready to be updated with data for this new activity.

⚠ Alert! When a Service Activity is copied the Start and End Dates are set to blank. The activity is set to "Not Reported". These fields must be updated to report the activity complete.

ⓘ Tip! We suggest you edit the **Title** of the Service Activity to make it easier to find in the future. To save the edits a "Start Date" is required.

ⓘ In-line edit method example

14 To edit the Title Click the pencil icon next to "Title".

Example Club SA7 - Service Project Surfing   Example Club For Training   Draft

Details   Image Gallery   **Imag...**   Uploa...

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

Record Type   Report Complete ⓘ
Service Project   ⛶   ☐   ✎

Title ⓘ
Example Club SA7 - Service Project 🖊
Surfing

Sponsor ⓘ   Cause
Example Club For Training ✎   Vision   ✎

Activity Level   Project Type
Lions Club   Other   ✎

Status ⓘ   Description ⓘ
Draft   We partnered with another club ✎
                               and a local surfing based youth
                               club to run an in water surfing
                               event for visually impaired.
                               Participants were age 6 to 72

15   Click the into the "Title" field to edit the name.

Details   Image Gallery

Imag...   Uploa...

* = Required Information

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

∨ Information

Record Type
Service Project

Report Complete ⓘ

* Title ⓘ

Club SA7 - Service Project Surfin

* Sponsor ⓘ
🏢 Example Club For Training ✕

* Cause
Vision ▼
View all dependencies

Activity Level
Lions Club
This field is calculated upon save

Project Type
Other ▼

Cancel   Save

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16   Click "Save"

Details   Image Gallery

Imag...   Uploa...

* = Required Information

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

∨ Information

Record Type
Service Project

Report Complete ⓘ

* Title ⓘ   ↺

Example Club SA8 - Service Proje

* Sponsor ⓘ
🏢 Example Club For Training ✕

* Cause
Vision ▼
View all dependencies

Activity Level
Lions Club
This field is calculated upon save

Project Type
Other ▼

Cancel   Save

17 The "Start Date" is required to save the activity. The error message will pop up to show the error(s). Click the link of the error. In this example "Start Date" is the error.

18   Clinking the error link will move you to the field causing the error. The message below will provide detail of the error. Correct the data and click "Save".

ⓘ   End of In-line edit method example

ⓘ   Pop-up form method example

19 Click "Edit"

20 Click into the field(s) to edit and then click "Save" to save your updates.

⚠ Reminder: Images are not copied to the new activity.

21 Note: there are no images for this new activity.

| le
ample Club SA8 - Service Project Surfing | Sponsor
Example Club For Training | Status
Draft |

etails   Image Gallery   Imag...   Uploa...

✓ Information

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

| Record Type | Report Complete (i) |
| Service Project | ☐ |

Title (i)
Example Club SA8 - Service Project
Surfing

| Sponsor (i) | Cause |
| Example Club For Training | Vision |

| Activity Level | Project Type |
| Lions Club | Other |

| Status (i) | Description (i) |
| Draft | We partnered with another club
and a local surfing based youth |

22 To return to the Club page click the link below "Sponsor"

23 Click "Home" to return to the landing page.

24   This concludes the "Service Activities - Copy A Service Activity" Quick Guide