

# 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.

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Sign into the Lion Portal [lionportal.org](https://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

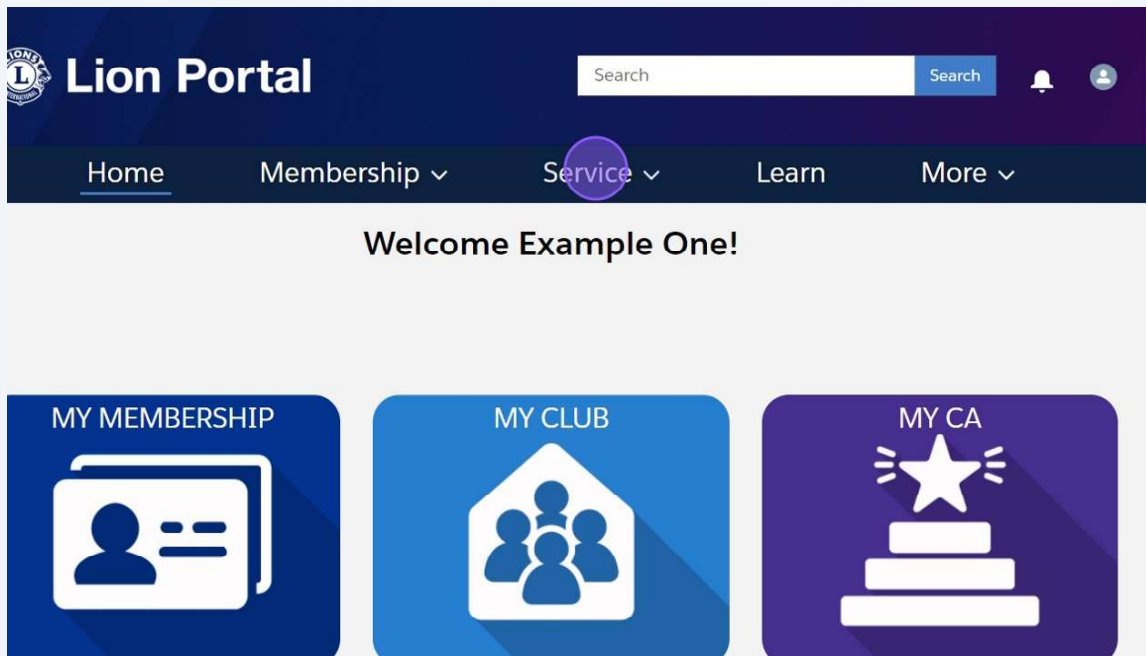
Both are shown



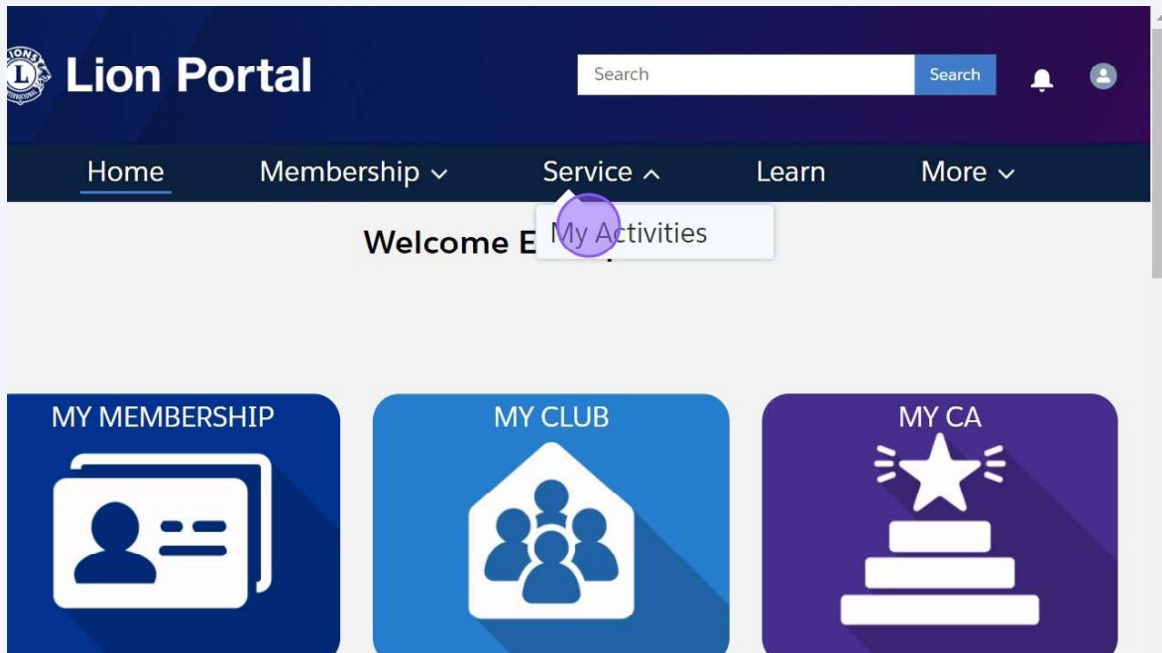
Locate from Service > My Activities

2

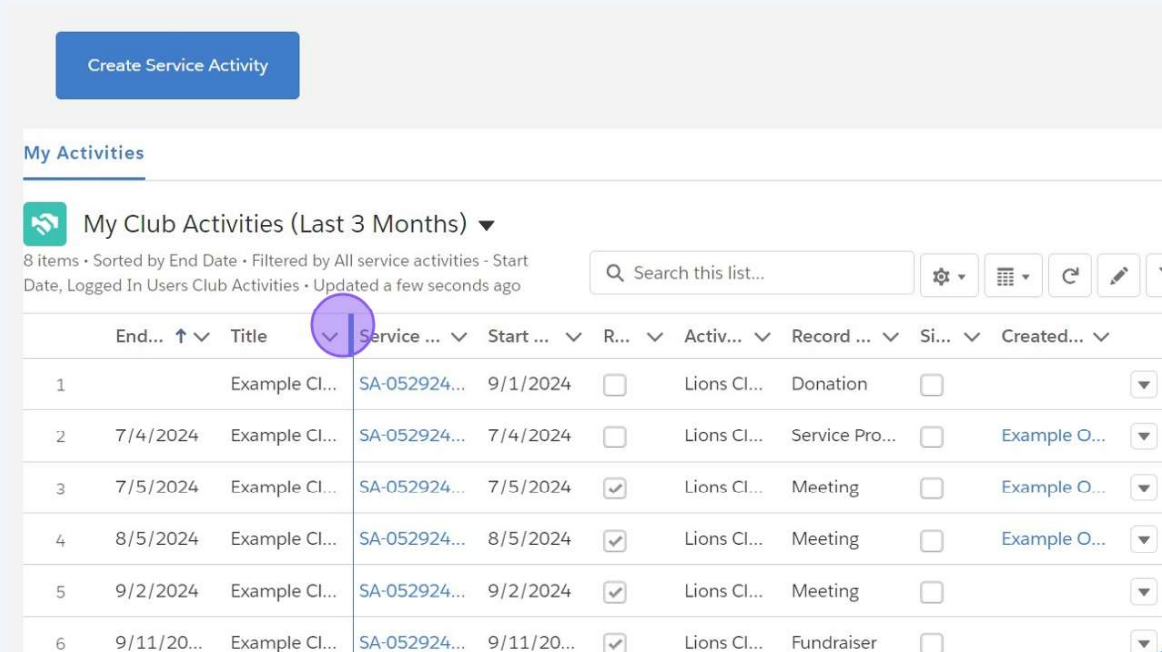
Click "Service"



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

Search this list...

	End... ↑ ▼	Title ▼	Service ... ▼	Start ... ▼	R... ▼	Activ... ▼	Record ... ▼	Si... ▼	Created... ▼
1		Example Club SA6...	SA-052924...	9/1/2024	<input type="checkbox"/>	Lions Cl...	Donation	<input type="checkbox"/>	
2	7/4/2024	Example Club SA7...	SA-052924...	7/4/2024	<input type="checkbox"/>	Lions Cl...	Service Pro...	<input type="checkbox"/>	Example O...
3	7/5/2024	Example Club SA1...	SA-052924...	7/5/2024	<input checked="" type="checkbox"/>	Lions Cl...	Meeting	<input type="checkbox"/>	Example O...
4	8/5/2024	Example Club SA2...	SA-052924...	8/5/2024	<input checked="" type="checkbox"/>	Lions Cl...	Meeting	<input type="checkbox"/>	Example O...
5	9/2/2024	Example Club SA2...	SA-052924...	9/2/2024	<input checked="" type="checkbox"/>	Lions Cl...	Meeting	<input type="checkbox"/>	
6	9/11/20...	Example Club SA5...	SA-052924...	9/11/20...	<input checked="" type="checkbox"/>	Lions Cl...	Fundraiser	<input type="checkbox"/>	
7	9/15/20...	Example Club SA3...	SA-052924...	9/15/20...	<input checked="" type="checkbox"/>	Lions Cl...	Service Pro...	<input checked="" type="checkbox"/>	

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

Lion Portal

Search

Home Membership ▼ Service ▼ Learn More ▼

Service Activity SA-05292423

Edit Copy Delete

Example Club SA7 - Service Project Surfing

Sponsor Example Club For Training

Status Ready to Report

Details Image Gallery


Information

Record Type Service Project

Report Complete

Title

Imag... Uploa...

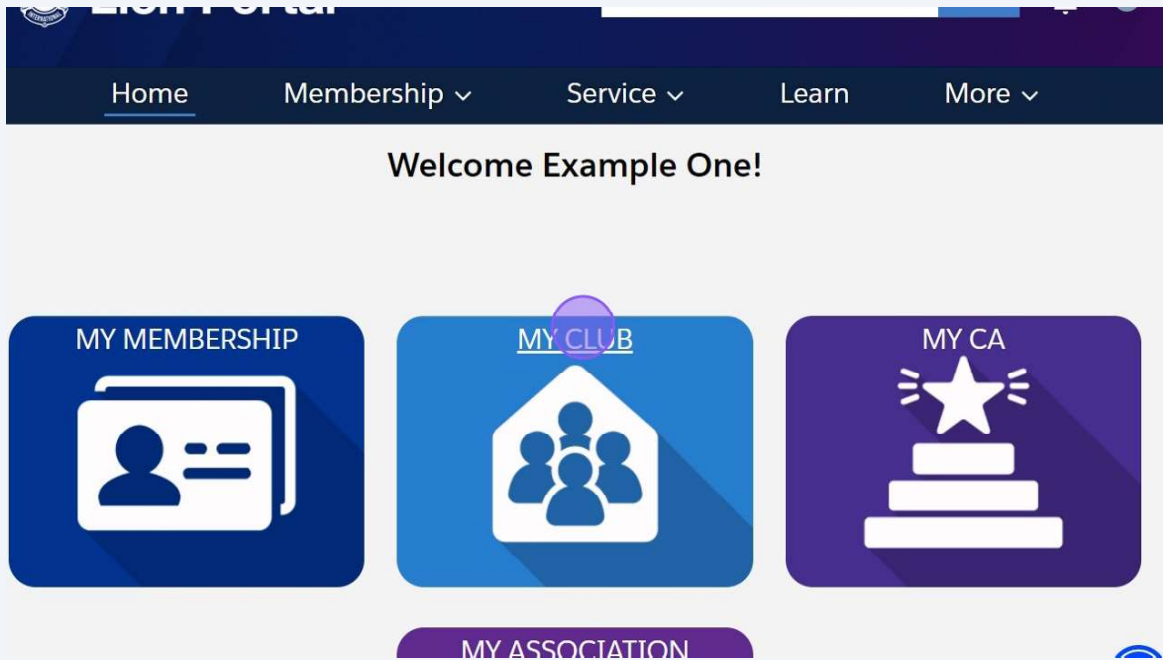




Locate from My Club > Club Service Activities Tab

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

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  
56

Club Specialty ⓘ  
Cultural

Club Sub-Specialty ⓘ

Manage Club Members

Manage Club Officers

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

Service Activities (9) [Settings](#) [Refresh](#)

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.

Service Activities (8)

8 items · Updated a few seconds ago

	End Date	Title	Service Acti...	Start Date	Re
1	7/5/2024	Example Club ...	<a href="#">SA-05292416</a>	7/5/2024	<input checked="" type="checkbox"/>
2	8/5/2024	Example Club ...	<a href="#">SA-05292417</a>	8/5/2024	<input checked="" type="checkbox"/>
3	9/15/2024	Example Club ...	<a href="#">SA-05292418</a>	9/15/2024	<input checked="" type="checkbox"/>
4	9/17/2024	Example Club ...	<a href="#">SA-05292419</a>	9/17/2024	<input checked="" type="checkbox"/>
5	9/11/2024	Example Club ...	<a href="#">SA-05292420</a>	9/11/2024	<input checked="" type="checkbox"/>
6		Example Club ...	<a href="#">SA-05292421</a>	9/1/2024	<input type="checkbox"/>
7	9/2/2024	Example Club ...	<a href="#">SA-05292422</a>	9/2/2024	<input checked="" type="checkbox"/>
8	7/4/2024	Example Club ...	<a href="#">SA-05292423</a>	7/4/2024	<input type="checkbox"/>

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

Example Club SA7 - Service Project Surfing

Sponsor

Example Club For Training

Status

Ready to Report

Details

Image Gallery

Information

Record Type

Service Project

Report Complete


📄

📝

Title

Imag...

Uploa...



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

The screenshot shows the 'Lion Portal' interface. At the top is a dark blue header with the 'Lion Portal' logo on the left, a search bar in the center, and a user profile icon on the right. Below the header is a navigation bar with links: Home, Membership (with a dropdown arrow), Service (with a dropdown arrow), Learn, and More (with a dropdown arrow). The main content area displays a 'Service Activity' form for 'SA-05292423'. At the top right of the form are three buttons: 'Edit', 'Copy' (highlighted with a purple circle), and 'Delete'. Below these buttons, the form shows fields for 'Title' (Example Club SA7 - Service Project Surfing), 'Sponsor' (Example Club For Training), and 'Status' (Ready to Report). The form is divided into two main sections: 'Details' and 'Image Gallery'. The 'Details' section is active and shows a 'Record Type' of 'Service Project' and a 'Report Complete' checkbox. The 'Image Gallery' section is also visible, showing a photo of a group of people at a surfing event.

## 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.

The screenshot shows the 'Lion Portal' interface with a green success message banner at the top. The banner contains a checkmark icon, the text 'Success!', and the message 'Success! Here is your copied activity. Begin editing now.' A purple circle highlights a close icon (an 'X' in a square) on the right side of the banner. Below the banner, the navigation bar and the 'Service Activity' form are visible. The form now shows a 'Status' of 'Draft' instead of 'Ready to Report'. The 'Copy' button is still highlighted. The 'Details' section shows the 'Record Type' as 'Service Project' and the 'Report Complete' checkbox. The 'Image Gallery' section is also visible, showing a photo of a group of people at a surfing event.





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

Information

Record Type

Service Project

Title

Example Club SA7 - Service Project Surfing

Sponsor

[Example Club For Training](#)

Activity Level

Lions Club

Status

Draft

Report Complete

☐

Cause

Vision

Project Type

Other

Description

We partnered with another club and a local surfing based youth club to run an in water surfing event for visually impaired.

Imag...

Uploa...

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

9

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

The screenshot shows a web form with a 'Details' tab selected. The form is titled 'Image Gallery' and has a sub-header 'Imag...'. A note at the top right says 'Use the Upload Images tab to begin uploading images.' The form contains several fields: 'Record Type' (Service Project), 'Report Complete' (checkbox), '\* Title' (text field with a purple circle around the edit icon), '\* Sponsor' (dropdown menu showing 'Example Club For Training'), '\* Cause' (dropdown menu showing 'Vision'), 'Activity Level' (Lions Club), and 'Project Type' (dropdown menu showing 'Other'). A 'Cancel' button and a 'Save' button are at the bottom. A blue circular icon is visible in the bottom right corner.

- 16 Click "Save"

The screenshot shows the same web form as in the previous image. The 'Title' field is now highlighted with a yellow box. The 'Save' button at the bottom is highlighted with a purple circle. The 'Cancel' button is also visible. The blue circular icon remains in the bottom right corner.



Tip! If there is an error trying to save the record. Helpful messages will guide you to the points to correct the errors

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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.

The screenshot shows a web application interface with a 'Details' tab and an 'Image Gallery' section. The form contains several fields: 'Record Type', 'Service Project', 'Title' (with a yellow highlight), 'Sponsor' (with a blue circle around the 'Example Club For Training' text), 'Cause' (with a dropdown menu showing 'Vision'), and 'Status'. A red error message box is displayed in the center, stating 'We hit a snag. Review the following fields: Start Date'. The 'Start Date' field is highlighted with a blue circle. The 'Save' button is visible at the bottom right. A legend at the top right indicates '\* = Required Information'.

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Clicking 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".

The screenshot shows a web form with a red border around the top input field. A yellow error message box is displayed above the 'End Date' field, stating: "Complete this field with format M/d/yyyy." Below this, the 'End Date' field is empty, with a calendar icon to its right. The form also includes a section titled "Required Metrics" with three input fields: "People Served" (containing "150"), "Total Volunteers" (containing "95"), and "Non-Lions Participated" (checked). A fourth field, "Non-Lion Family Members Participated", is partially visible at the bottom. At the bottom right of the form, there are "Cancel" and "Save" buttons. A user profile icon and name "Example One, 9/22/2024, 9:16 AM" are visible in the top right corner. A blue circular icon with a white 'f' is located in the bottom right corner of the form area.



End of In-line edit method example



Pop-up form method example

19 Click "Edit"

The screenshot shows the 'Service Activity' page for 'SA-05292424'. The top navigation bar includes 'Home', 'Membership', 'Service', 'Learn', and 'More'. The main content area has a header with 'Service Activity' and 'SA-05292424', and buttons for 'Edit', 'Copy', and 'Delete'. Below this is a table with columns for 'Title', 'Sponsor', and 'Status'. The 'Title' column shows 'Example Club SA8 - Service Project Surfing', the 'Sponsor' column shows 'Example Club For Training', and the 'Status' column shows 'Draft'. Below the table is a 'Details' section with tabs for 'Information' and 'Image Gallery'. The 'Information' tab is active, showing fields for 'Record Type' (Service Project), 'Title' (Example Club SA8 - Service Project Surfing), 'Sponsor' (Example Club For Training), 'Cause' (Vision), 'Report Complete' (checkbox), and 'Project Type' (Other). A purple circle highlights the 'Edit' button in the top right corner.

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

The screenshot shows the 'Service Activity' page with the 'Edit' button circled in purple. The 'Information' form is displayed, showing fields for 'Record Type' (Service Project), 'Title' (Example Club SA8 - Service Project S), 'Sponsor' (Example Club For Training), 'Cause' (Vision), 'Activity Level' (Lions Club), 'Project Type' (Other), and 'Report Complete' (checkbox). The 'Save' button is highlighted in blue. A purple circle highlights the 'Edit' button in the top right corner.



## End of Pop-up form method example



Reminder: Images are not copied to the new activity.

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Note: there are no images for this new activity.

The screenshot shows a web form for a new activity. At the top, the title is 'Example Club SA8 - Service Project Surfing'. Below the title, there are fields for 'Sponsor' (Example Club For Training) and 'Status' (Draft). The form is divided into two main sections: 'Details' and 'Image Gallery'. The 'Details' section contains a table with the following information:

Information	
Record Type	Service Project
Title	Example Club SA8 - Service Project Surfing
Sponsor	Example Club For Training
Activity Level	Lions Club
Status	Draft
Report Complete	<input type="checkbox"/>
Cause	Vision
Project Type	Other
Description	We partnered with another club and a local surfing based youth

The 'Image Gallery' section is currently empty, showing a message: 'Use the Upload Images tab to begin uploading images.' A purple circle highlights the 'Upload Images' tab. A blue circular icon with a person silhouette is visible in the bottom right corner of the form.

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

The screenshot shows the Lion Portal interface. At the top, there is a dark blue header with the Lion Portal logo, a search bar, and navigation links: Home, Membership, Service, Learn, and More. Below the header, there is a section for a Service Activity (SA-05292424) with buttons for Edit, Copy, and Delete. The main content area displays the details of the Service Activity, including the Title (Example Club SA8 - Service Project Surfing), the Sponsor (Example Club For Training), and the Status (Draft). A modal window titled 'Example Club For Training' is open, showing details for the club, including 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.

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

The screenshot shows the Lion Portal interface. At the top, there is a dark blue header with the Lion Portal logo, a search bar, and navigation links: Home, Membership, Service, Learn, and More. The 'Home' link is highlighted with a purple circle. Below the header, there is a section for an Account (Example Club For Training) with a '+ Follow' button. The main content area displays the details of the account, including Lion ID (200158), Type (Lions Club), Status (Active), and Billing Address (124 Any Place, Naperville, Illinois 60565, United States). Below this, there is a section for Club Details with tabs for Club Details, Data Export, Club Statements, Club Service Activities, and More. The Club Details tab is active, showing the Account Name (Example Club For Training), Parent Account, Type (Lions Club), and Active Member Count (56). A 'Manage Club Members' button is visible in the bottom right corner.

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

