

Manage Club Officers - Create A New Assignment



This guide is essential for anyone involved in managing club officers within the Lions International framework, streamlining the process of assigning roles at various organizational levels. It provides clear instructions on how to effectively use the Lion Portal to assign club officers, ensuring that all necessary positions are filled for smooth club operations. Additionally, the guide emphasizes the importance of proper title permissions and offers tips for efficient management, making it a valuable resource for leaders within the Lions community. By following this guide, users can enhance their club's leadership structure and ensure compliance with organizational requirements.



Tip! This shows how to assign officers for your club. The process to assign officers at the district or multiple district follows the same system steps, the list of titles will change based on the level.

Officers can be assigned for the **current** year. These will become effective immediately and end on June 30th. **Upcoming** year will become effective on July 1st of the next Lion year and end on June 30th of that Lion year.



Alert! To assign officers you must have a title that gives you this permission.

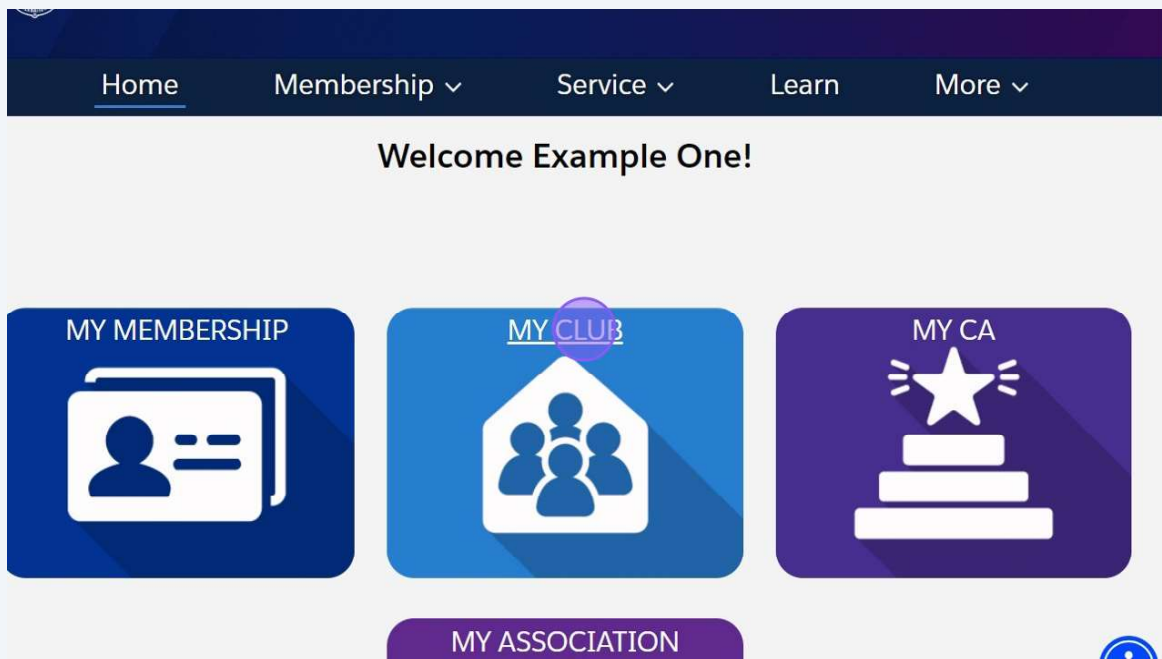
Titles that can assign officers at the individual Club level are:

- Club President
- Club Secretary
- Club Administrator
- District Administrator can assign officers for your Club

1

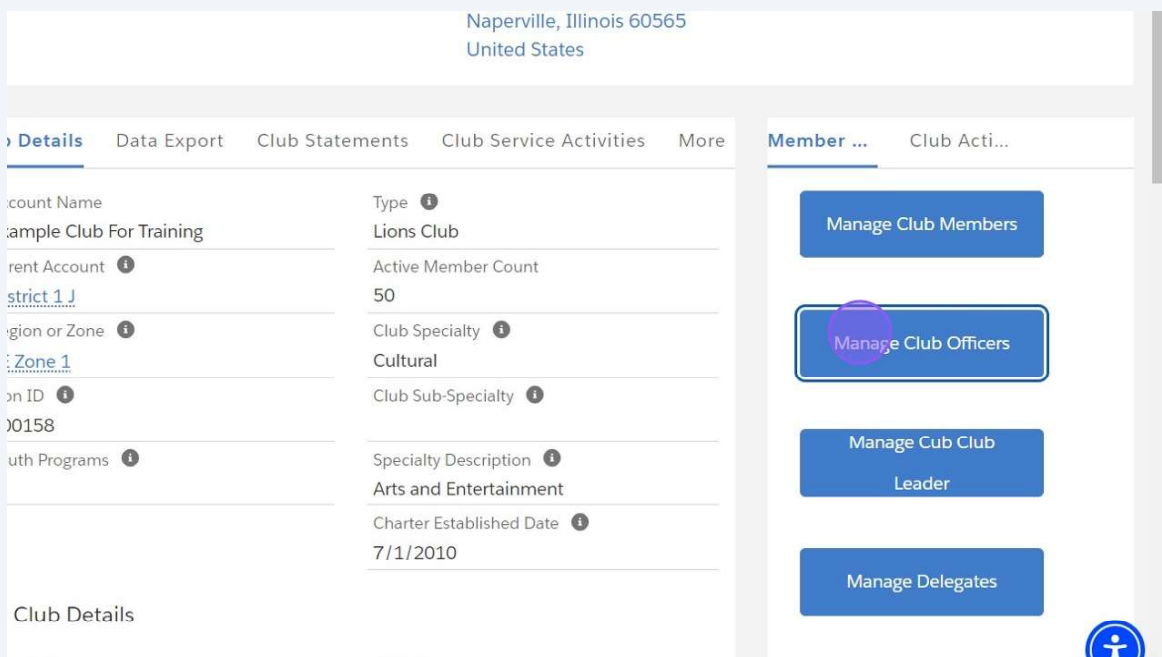
Sign in to the Lion Portal. lionportal.org

2 Click "MY CLUB"



Create Officer Assignment

3 Click "Manage Club Officers"



4 Click "Create New Assignment"

The screenshot shows a web application interface with a modal dialog titled "Manage Club Officers". The dialog contains a section labeled "*Select from the options below" with three radio button options: "Create New Assignment", "End Assignment", and "Add Officer Address". The "Create New Assignment" option is selected, indicated by a purple circle. A blue "Next" button is located at the bottom right of the dialog. The background shows a "Club Details" page for a Lions Club with fields for Account Name, Parent Account, Region or Zone, Lion ID, Youth Programs, Specialty Description, and Charter Established Date.

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

Club Details | Data Export

Account Name
Example Club For Training

Parent Account ⓘ
District 1 J

Region or Zone ⓘ
SE Zone 1

Lion ID ⓘ
200158

Youth Programs ⓘ

Specialty Description ⓘ
Arts and Entertainment

Charter Established Date ⓘ
7/1/2010

Manage Club Officers

*Select from the options below

☒ Create New Assignment

☐ End Assignment

☐ Add Officer Address

Next

5 Click "Next"

This screenshot is similar to the previous one, showing the "Manage Club Officers" dialog box. In this step, the "Next" button at the bottom right of the dialog is highlighted with a purple circle, indicating it should be clicked. The background interface remains the same, showing the "Club Details" page.

Manage Club Officers

*Select from the options below

☒ Create New Assignment

☐ End Assignment

☐ Add Officer Address

Next

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Click "Current Lion Year" to create an immediate assignment.
Click "Upcoming Lion Year" to enter next year assignments; effective on July 1st.

The screenshot shows a web application interface for managing club officers. A modal dialog titled "Manage Club Officers" is open. Inside the dialog, the question "When Should This Assignment Begin?" is followed by two radio button options: "Current Lion Year" (which is selected, indicated by a purple circle) and "Upcoming Lion Year". At the bottom of the dialog are two buttons: "Previous" and "Next". The background shows a blurred view of a club's details page, including fields for Account Name, Parent Account, Region or Zone, Lion ID, and Charter Established Date.

7

Click "Next"

This screenshot shows the same "Manage Club Officers" dialog box as in the previous step. In this step, the "Current Lion Year" radio button remains selected. The "Next" button at the bottom right of the dialog is highlighted with a purple circle, indicating it is the button to be clicked. The background interface remains the same, showing the club details page.

8

Click this dropdown to select "Officer" or "Administrator" title type.

Manage Club Officers

What is the Officer and Title Type for this title?

* Officer Type

--None--

* Title Type

Official

--None--

Officer

Administrator



Alert!

Official titles provide the permissions to perform action in and view member data in the Lion Portal.

Local titles are specific to only your club and do not provide access to actions or data above the non-officer level.



Tip!

Every Club should assign:

- Club President
- Club Treasurer
- Club Secretary
- Club Administrator

Every District and Multiple District is encouraged to assign a District or Multiple District Administrator. These positions can assist and perform functions for the Clubs under their hierarchy.

9

Click this dropdown to Select "Official" or "Local" title


United States

Manage Club Officers

What is the Officer and Title Type for this title?

* Officer Type

Officer

* Title Type 

Official

Previous Next

--None--

Official

Local

Club Details


Description Website

Manage Club Members

Manage Club Officers

Manage Club Club Leader

Manage Delegates



10 Click "Next"

The screenshot shows a 'Manage Club Officers' dialog box overlaid on a blurred background of a club management interface. The dialog box has a title bar 'Manage Club Officers' and a question 'What is the Officer and Title Type for this title?'. Below the question, there are two dropdown menus: '* Officer Type' with 'Officer' selected, and '* Title Type' with 'Official' selected. At the bottom right of the dialog box, there are two buttons: 'Previous' and 'Next'. The 'Next' button is highlighted with a purple circle. The background interface shows various club details and action buttons like 'Manage Club Members', 'Manage Club Officers', 'Manage Club Club Leader', and 'Manage Delegates'.

11 Click this dropdown to show the list of official titles which can be assigned.

The screenshot shows the same 'Manage Club Officers' dialog box, but now the '* Officer Title' dropdown menu is open, displaying a list of official titles. The dropdown menu has a search bar and a list of items. The first item is '--None--', which is highlighted with a blue background. Other items in the list include 'Club Director', 'Club First Vice President', 'Club LCIF Coordinator', 'Club Marketing Chairperson', 'Club Membership Chairperson', 'Club President', and 'Club Second Vice President'. The 'Next' button from the previous screenshot is still visible and highlighted with a purple circle.

12

To select the member for the title scroll through the list or Click the "Search this list..." to search and limit the list.

Manage Club Officers

*Officer Title
Club President

Active Members
50 of 50 items • 0 items selected

Search this list...

	Full Name	Member ID
<input type="radio"/>	Example Member Eight	26691558
<input type="radio"/>	Example Member Eighteen	26691568
<input type="radio"/>	Example Member Eleven	26691561
<input type="radio"/>	Example Member Fifteen	26691565

13

Type in the text to search bar next to the magnifying glass icon.

- 14 A list of possible matches is shown. Click the radio button to select the member.

The screenshot shows a web application interface with a modal window open. The modal is titled "Active Members" and displays a list of members. The background shows a "Club Details" page with fields like "Account Name", "Parent Account", "District 1 J", "Region or Zone", "SE Zone 1", "Lion ID", "200158", and "Youth Programs".

The modal window has a search bar with the text "one" and a dropdown menu for "Officer Title" set to "Club President". Below the search bar, it says "4 of 4 items • 0 items selected". The list of members is as follows:

Full Name	Member ID
Example Member Forty-One	26691591
Example Member One	26691550
Example Member Thirty-One	26691581
Example Member	26691571

The radio button next to "Example Member One" is selected and circled in purple.

- 15 Scroll down, if necessary, and Click "Next"

The screenshot shows the same web application interface, but the modal window now shows the "Next" button highlighted. The member "Example Member One" is now selected, and the "Next" button is circled in purple.

The modal window shows "4 of 4 items • 1 item selected". The list of members is the same as in the previous screenshot, but the selection status has changed:

Full Name	Member ID
Example Member Forty-One	26691591
Example Member One	26691550
Example Member Thirty-One	26691581
Example Member Twenty-One	26691571

The "Next" button is circled in purple.

16

If you would like to add a additional address for the officer, select the "Yes" radio button.

The screenshot shows a web application interface for managing club officers. A modal dialog box titled "Manage Club Officers" is centered on the screen. The dialog contains the question "Would you like to add an officer address?" and two radio buttons: "Yes" (which is selected and highlighted with a purple circle) and "No". A blue "Next" button is located at the bottom right of the dialog. The background is a blurred view of the "Club Details" page, showing fields like "Account Name", "Parent Account", "Region or Zone", "Lion ID", and "Youth Programs".

17

Click "Next"

This screenshot is similar to the previous one, showing the "Manage Club Officers" dialog box. In this step, the "Yes" radio button is still selected, but the blue "Next" button at the bottom right is now highlighted with a purple circle, indicating it is the next step in the process. The background remains the same blurred "Club Details" page.

18

The member Home address and if there is an existing officer address will be displayed,

If the Officer Address is different from the Home Address, update it now.

Home Address:
3806 Gladstone Avenue
Riverside, Illinois 60546
United States

Officer Address
Country: United States
Street: 542 Main Street
City: Riverside
State/Province: [Dropdown]
Zip/Postal Code: 60546

Previous Save

19

If the information needs to be updated, enter the updates. If the information is correct, no changes need to be entered. When done Click "Save"

Home Address:
3806 Gladstone Avenue
Riverside, Illinois 60546
United States

Officer Address
Country: United States
Street: 542 Main Street
City: Riverside
State/Province: [Dropdown]
Zip/Postal Code: 60546

Previous Save



Alert! Specific permissions may take up to 24 hours to become effective. The time to create permissions and data shares takes longer the higher the level of position. Multiple District (longest time) down to the Club level (shortest). Club level permissions are generally available within 5 - 30 minutes.

20

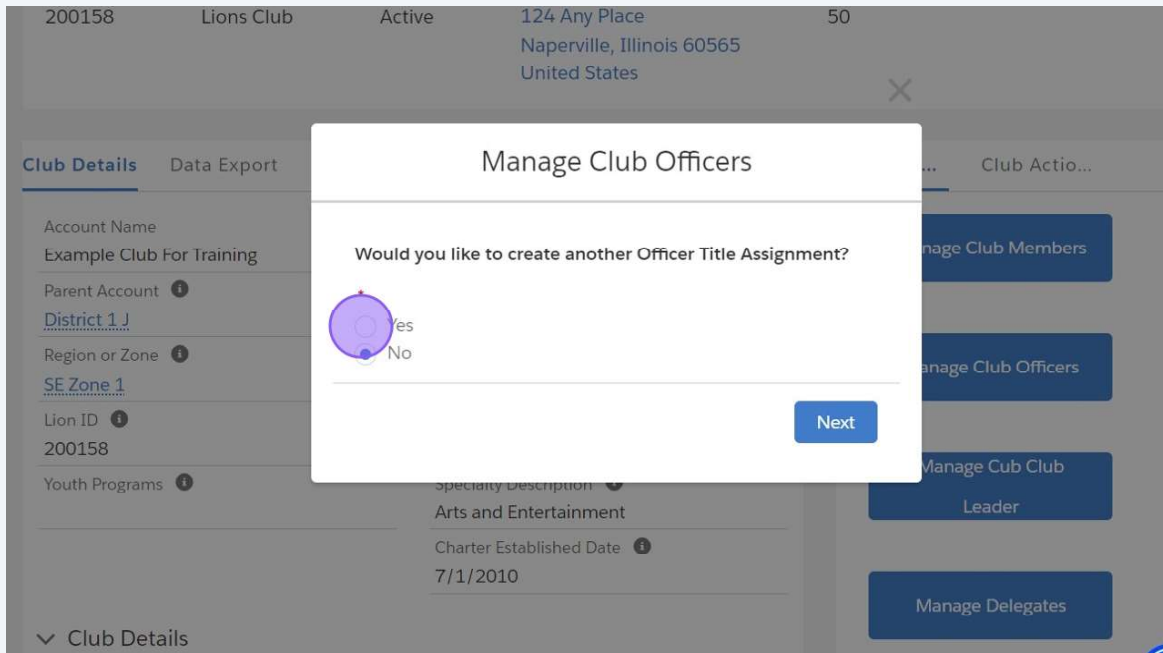
Upon creation of the assignment a green "Success!" message will appear. Click the "X" to close the message.

Select the "No" radio button to complete assigning officers.



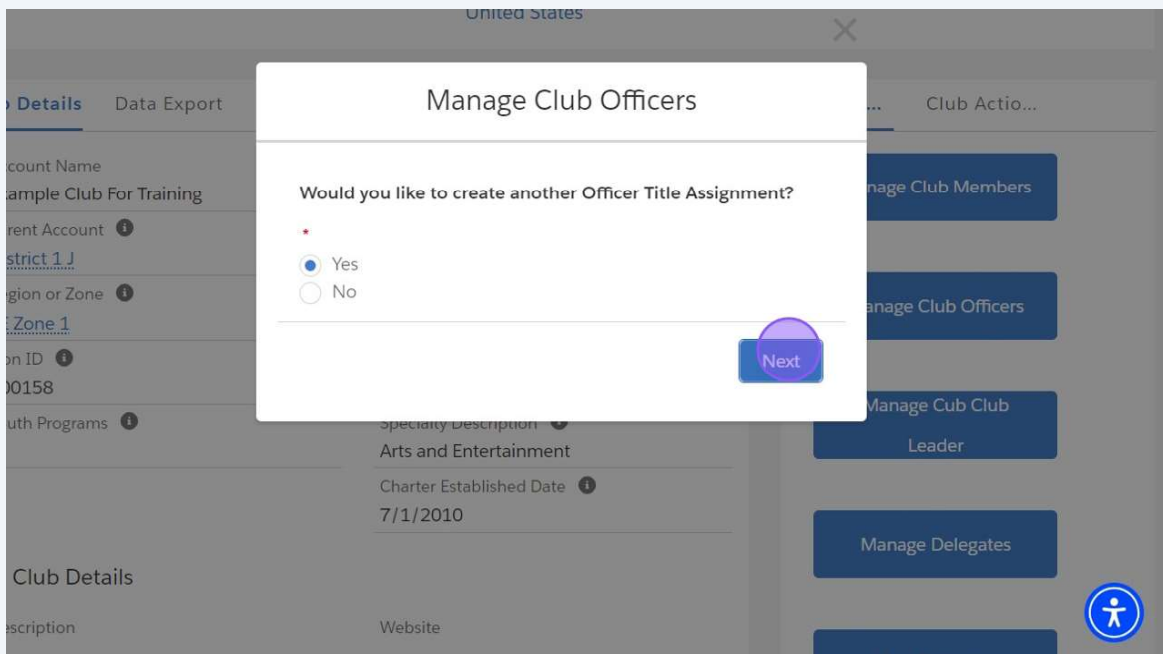
Tip! The following steps repeat the process to add another "Official" title. This example is the Club Administrator. Skip to step 32 for completing officer assignments.

- 21 Select "Yes" to assign another officer. Select "No" to end adding officers.



The screenshot shows a web application interface for managing a club. A modal dialog titled "Manage Club Officers" is centered on the screen. The dialog contains the question "Would you like to create another Officer Title Assignment?". Below the question, there are two radio button options: "Yes" and "No". The "No" option is selected, indicated by a purple circle with a white dot. To the right of the radio buttons is a blue button labeled "Next". The background of the application is dimmed, showing club details for "Lions Club" with ID "200158".

- 22 Click "Next"



This screenshot is identical to the previous one, showing the "Manage Club Officers" dialog box with the "No" option selected. However, a purple circle is now highlighting the blue "Next" button, indicating the next step in the process. The background application interface remains the same, showing the "Lions Club" details.

23 Click here.

The screenshot shows a web application interface for managing a Lions Club. A modal dialog titled "Manage Club Officers" is open. Inside the dialog, the question "When Should This Assignment Begin?" is followed by two radio button options: "Current Lion Year" and "Upcoming Lion Year". The "Current Lion Year" option is selected and highlighted with a purple circle. Below the options are "Previous" and "Next" buttons. The background shows the "Club Details" page for club 200158, including fields for Account Name, Parent Account, Region or Zone, Lion ID, and Charter Established Date.

24 Click "Next"

This screenshot shows the same "Manage Club Officers" dialog box as the previous one. In this step, the "Next" button is highlighted with a purple circle, indicating the user should click it to proceed. The "Current Lion Year" radio button remains selected. The background interface is consistent with the previous screenshot.

25 Click this dropdown.

The screenshot shows a 'Manage Club Officers' dialog box overlaid on a blurred background of a club management interface. The dialog box has a title bar 'Manage Club Officers' and a question 'What is the Officer and Title Type for this title?'. It contains two dropdown menus: '* Officer Type' and '* Title Type'. The '* Officer Type' dropdown is currently set to '--None--' and is highlighted with a purple circle. The '* Title Type' dropdown is set to 'Official'. Below the dropdowns are three buttons: 'Previous', 'Next', and 'Cancel'. The background interface shows a table with columns: 'Club ID', 'Type', 'Status', 'Billing Address', and 'Active Member Count'. The first row shows '00158', 'Lions Club', 'Active', '124 Any Place, Naperville, Illinois 60565, United States', and '50'. Other buttons visible in the background include 'Manage Club Members', 'Manage Club Officers', 'Manage Club Club Leader', and 'Manage Delegates'.

26 Click "Next"

This screenshot shows the same 'Manage Club Officers' dialog box as in the previous step, but now the 'Officer Type' dropdown is set to 'Administrator'. The 'Next' button is highlighted with a purple circle. The background interface remains the same, showing the club management details and various action buttons.

- 27 Select the title and the members to assign to the title.

Manage Club Officers

* Officer Title
Club Administrator
Please select a choice.

Active Members
50 of 50 items • 0 items selected

Search this list...

Full Name	Member ID
<input type="radio"/> Example Member Eight	26691558
<input type="radio"/> Example Member Eighteen	26691568
<input type="radio"/> Example Member Eleven	26691561
<input type="radio"/> Example Member	

- 28 Click "Next"

Manage Club Officers

* Officer Title
Club Administrator
Please select a choice.

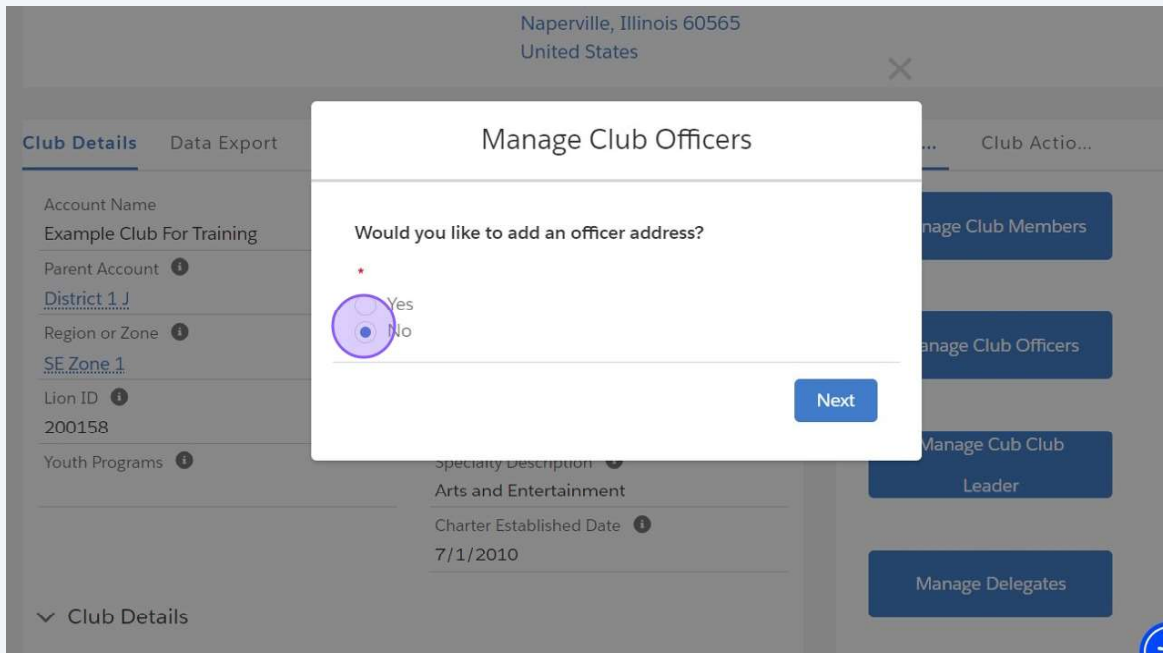
Active Members
50 of 50 items • 0 items selected

Search this list...

Full Name	Member ID
<input type="radio"/> Example Member Forty-Four	26691594
<input checked="" type="radio"/> Example Member Four	26691554
<input type="radio"/> Example Member Fourteen	26691564
<input type="radio"/> Example Member Thirty-Four	26691584
<input type="radio"/> Example Member Twenty-Four	26691574

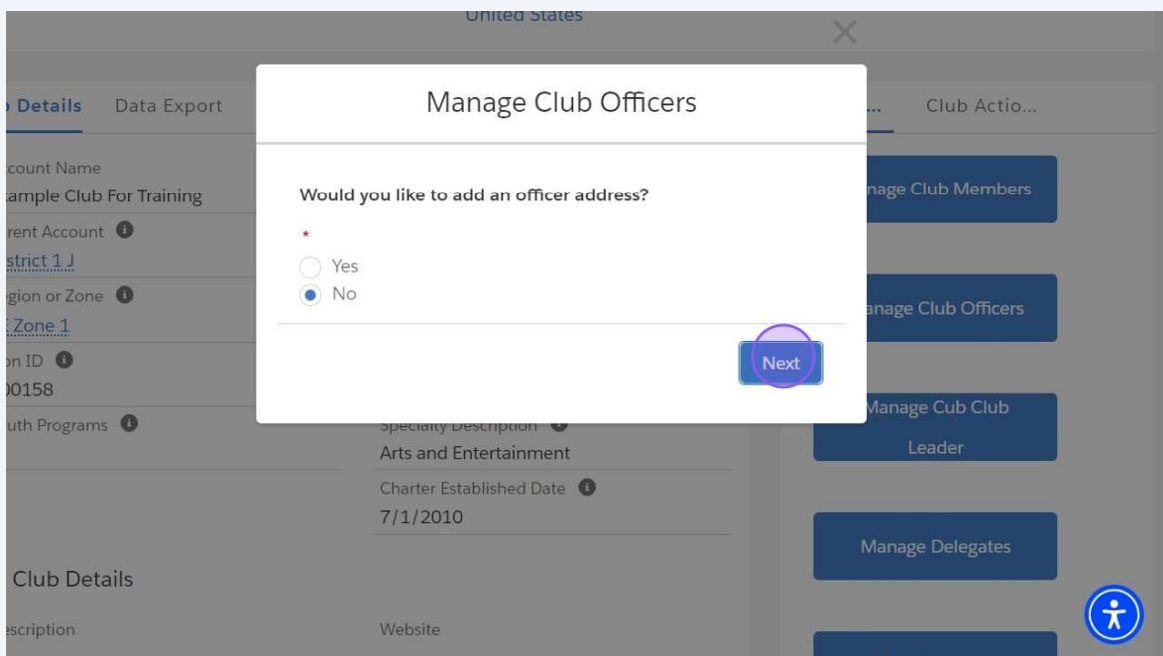
Previous Next

- 29 Click "No" to skip adding an Officer address.



The screenshot shows a web application interface with a modal dialog titled "Manage Club Officers". The dialog asks, "Would you like to add an officer address?". There are two radio buttons: "Yes" and "No". The "No" radio button is selected, indicated by a blue dot. A blue "Next" button is located at the bottom right of the dialog. The background shows a "Club Details" page for "Example Club For Training" with fields like "Parent Account", "District 1 J", "Region or Zone", "SE Zone 1", "Lion ID", "200158", "Youth Programs", "Specialty Description", "Arts and Entertainment", "Charter Established Date", and "7/1/2010".

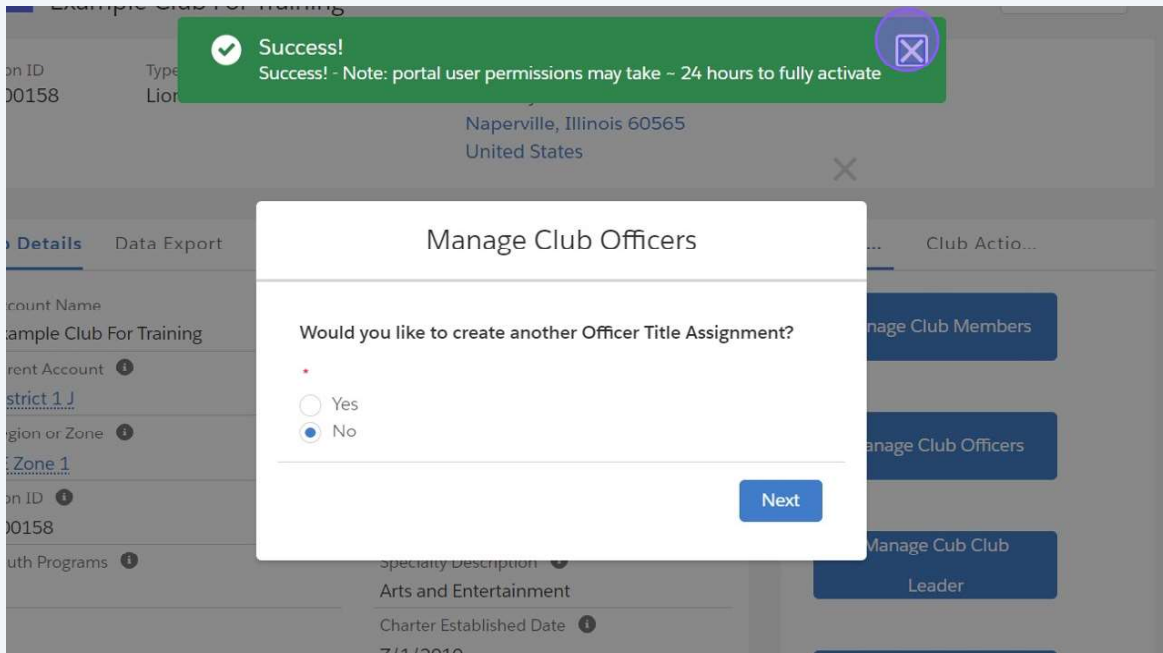
- 30 Click "Next"



The screenshot shows the same "Manage Club Officers" dialog box as in the previous step. The "No" radio button remains selected. The blue "Next" button at the bottom right is now highlighted with a blue circle, indicating it is the next step to click. The background interface is the same as in the previous screenshot.

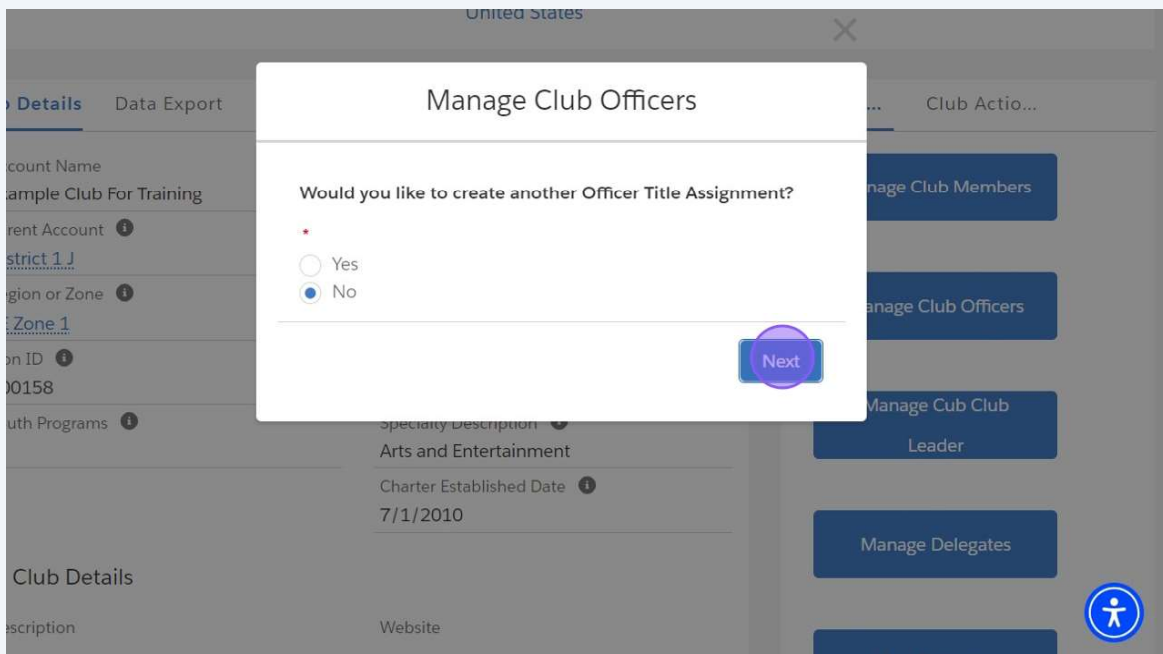
31

Upon creation of the assignment a green "Success!" message will appear. Click the "X" to close the message.



32

Select "No" to complete adding officers. Click "Next"



Review The Officer Assignment



Tip! Reviewing Officer Assignments. This section shows how to review the assignments of officers.

33

Click "View Club Officers"

Region or Zone ⓘ Zone 1	Club Specialty ⓘ Cultural	<div>Manage Club Officers</div> <div>Manage Cub Club Leader</div> <div>Manage Delegates</div> <div>View Delegates</div> <div>View Club Officers</div>
Club ID ⓘ 00158	Club Sub-Specialty ⓘ	
Youth Programs ⓘ	Specialty Description ⓘ Arts and Entertainment	
	Charter Established Date ⓘ 7/1/2010	
Club Details		
Description	Website	
Address		
Billing Address		
24 Any Place		
Naperville, Illinois 60565		
United States		
Shipping Address		
24 Any Place		

Club Me... Club Offic... Mor ⓘ

34 Select the assignment to review. Current, Past, Future and Click "Next"

View Club Officers

Which Officers Would You Like To See?

☒ Current Officers

☐ Past Officers

☐ Future Officers

Next

35 The list of officers is displayed

<input type="radio"/>	Exam ple One	Club Secret ary	Sep ...	Jun ...	sben1 1@ms n.com	404 535- 676 7
<input type="radio"/>	Exam ple One	Club Presid ent	Sep ...	Jun ...	sben1 1@ms n.com	404 535- 676 7
<input type="radio"/>	Exam ple Four	Club Admi nistrat or	Sep ...	Jun ...	sben1 1@ms n.com	(555) 265- 554 4

Previous Next

36

Click the "X" to Close this window


View Club Officers

<input type="radio"/>	Exam ple One	Club Secret ary	Sep ...	Jun ...	sben1 1@ms n.com	404 535- 676 7
<input type="radio"/>	Exam ple One	Club Presid ent	Sep ...	Jun ...	sben1 1@ms n.com	404 535- 676 7
<input type="radio"/>	Exam ple Four	Club Admi nistrat or	Sep ...	Jun ...	sben1 1@ms n.com	(555) 265- 554 4

Previous
Next


37


Click "Home"



Lion Portal

Search






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	50

Club Details

Data Export

Club Statements

Club Service Activities

More

Account Name

Example Club For Training

Parent Account ⓘ

Type ⓘ

Lions Club

Active Member Count

Member ...

Club Acti...

Manage Club Members

38

This concludes the "Manage Club Officers - Create A New Assignment" Quick Guide

