Service Activities - Create, Report, Copy A Meeting Activity


This guide is essential for anyone looking to efficiently manage activities within the Lion Portal. It provides step-by-step instructions on creating, reporting, and copying service activities, specifically focusing on meetings, which now have their own reporting metrics. By following this guide, users can streamline their process, ensuring accurate data entry and effective tracking of volunteer efforts. Additionally, the tips included enhance usability, making it easier to navigate and manage activities effectively.

> ⓘ Tip! Meeting activities now have their own classification for reporting. Metrics for these type of activities are grouped under "Meetings".
>
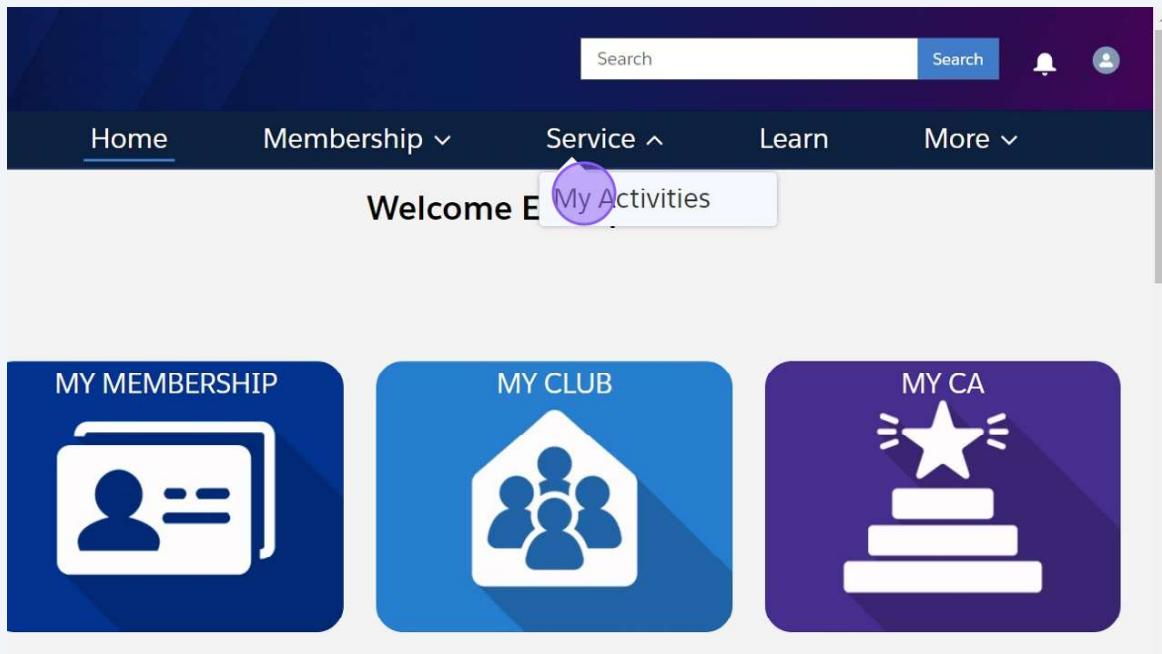> This Quick Guide covers creating, reporting, copying and then reporting the new activity for the Meeting Activity type.

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1 Sign in to the Lion Portal. **lionportal.org**

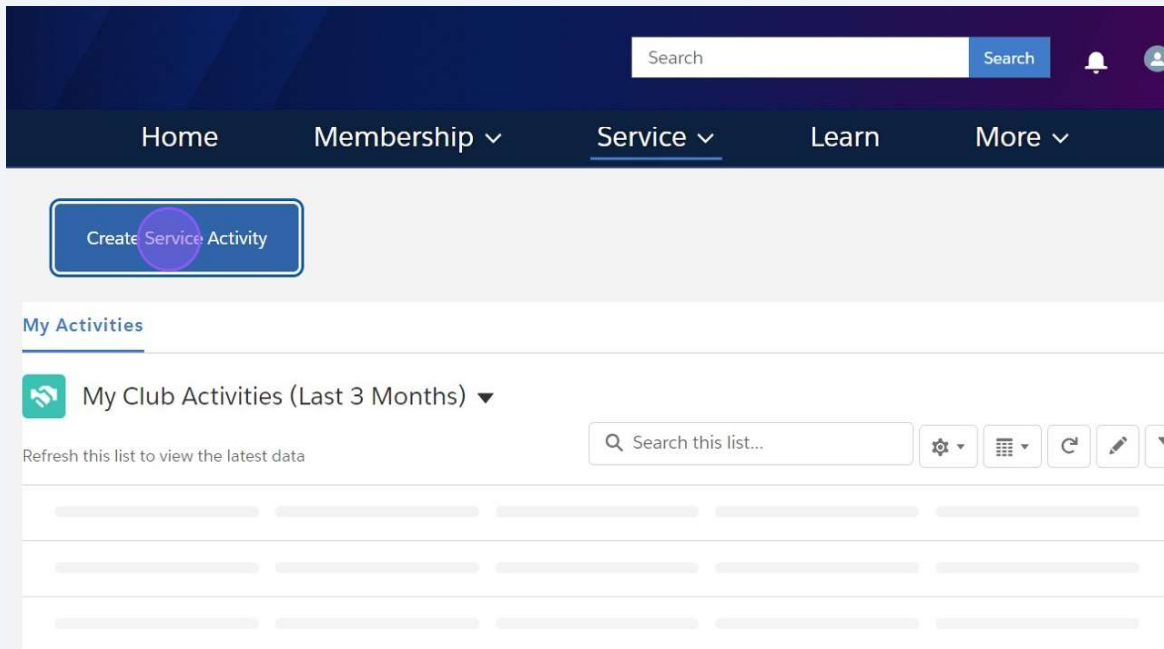**2** Click "Service"
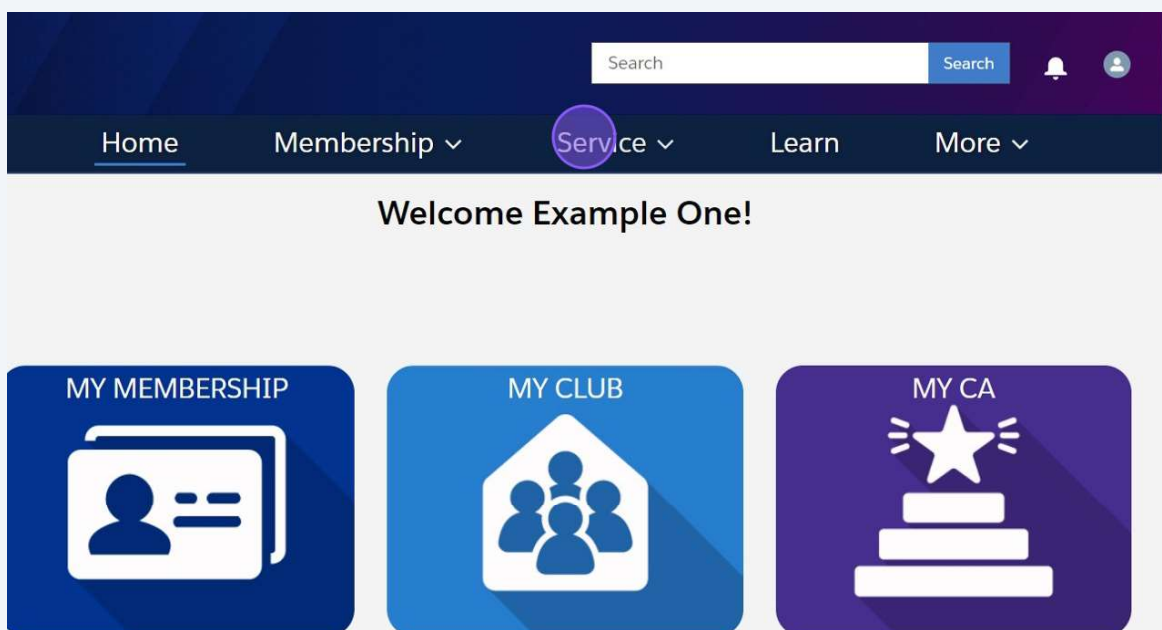
3   Click "My Activities"

Create a Service Activity

4   Click "Create Service Activity"

Tip! Options are shown to navigate to addition Leo, Lion, or districts you may also have permissions to manage their Service Activities.

5 To create a Service Activity for your club, click the radio button next to your club name.
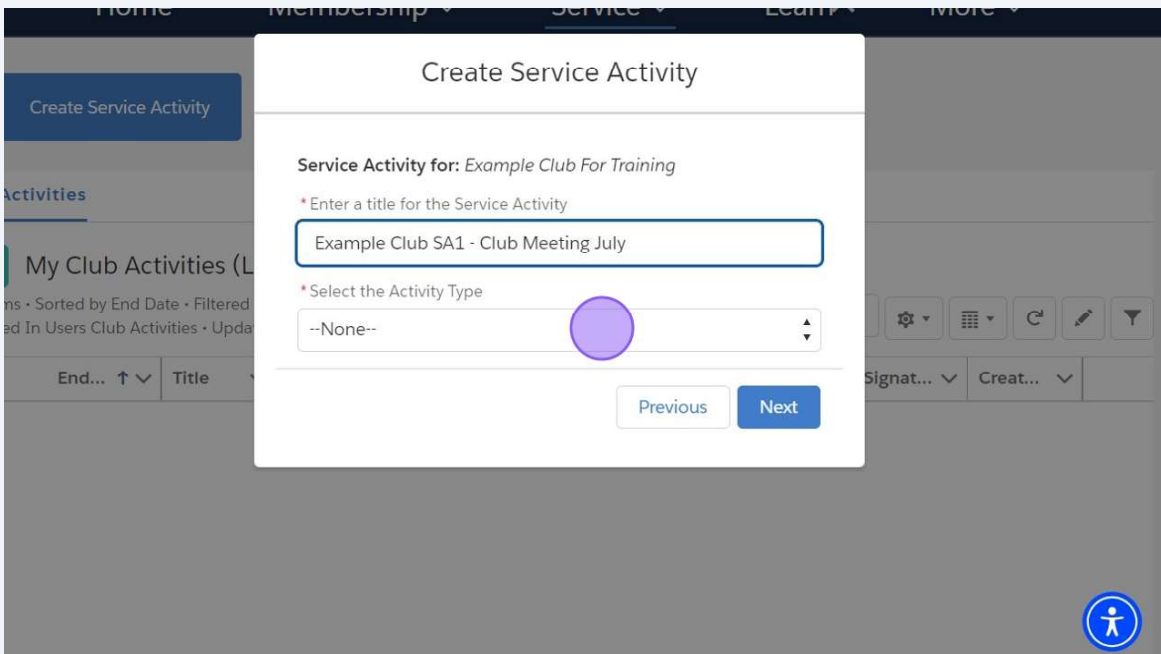

6 Click "Next"

7   Enter a Title for the Service Activity

(i) Tip! Each type of Service Activity has different required data fields. The Service Activity types are:

• Service Project

• Fundraiser

• Donation

• Meeting

8   Click this dropdown. Select the type of Service Activity

9   This example is a Meeting type Service Activity, click "Next"

Create Service Activity

Create Service Activity

Activities

My Club Activities (L

ns · Sorted by End Date · Filtered
ed In Users Club Activities · Upda

End... ↑ ∨ | Title

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

Signat... ∨ | Creat... ∨

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10   A new Service Activity is created. To begin editing the activity click on a pencil icon or the "edit" button in the upper right.

Service Activity
SA-05292416

Edit   Copy   Delete

:le
:xample Club SA1 - Club Meeting July

Sponsor
Example Club For Training

Status
Draft

etails   Image Gallery

Imag...   Uploa...

∨ Information

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

Record Type
Meeting

Report Complete ⓘ

Title ⓘ
Example Club SA1 - Club Meeting
July

Sponsor ⓘ
Example Club For Training

Cause
Administration

Activity Level

Project Type

11 If you click "Edit" a new pop up will open

12 To enter/update data click into the fields or use the "tab" key

13 You can scroll through the form

14 Service Activities require a description Click the "Description" field to enter data.

15 Click the "*Start Date" field. Type in the date using the MM/DD/YYYY format

16 Click the "End Date" field.

17   Click the calendar icon to select a date from a calendar

18   click on the date
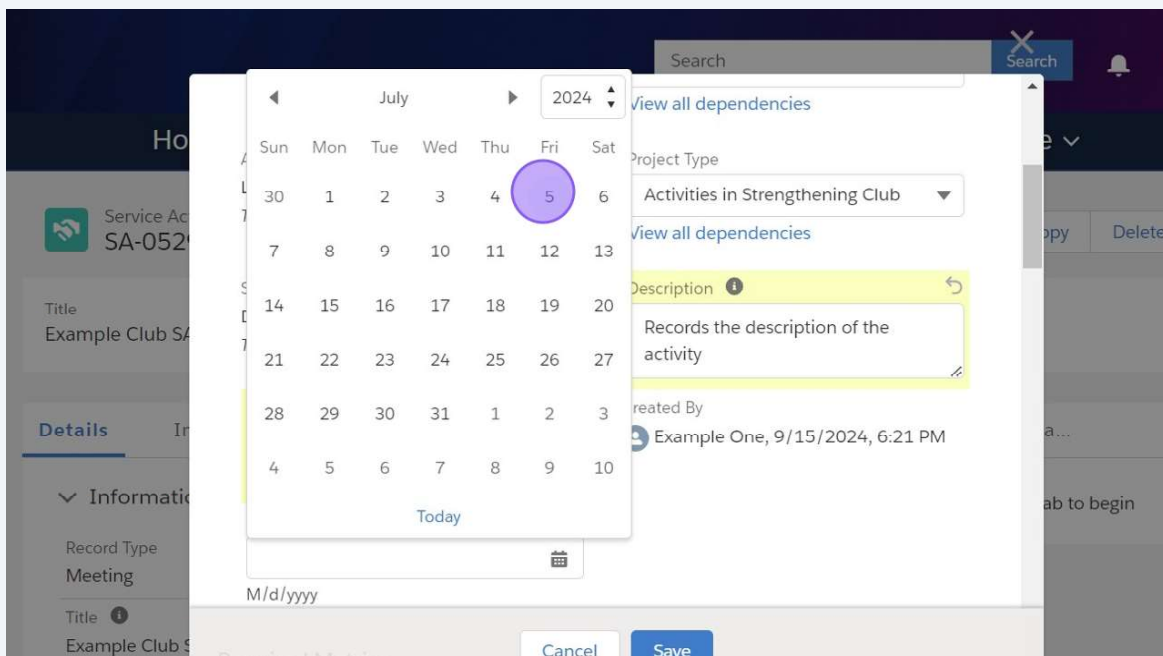
19 Click the "Total Volunteers" field to enter the data

20 Click the "Total Volunteer Hours" field to enter the hours. This is a **required** data field

21 Scrolling further, more metrics are displayed.

22 Continue to Scroll

23 Continue to scroll to enter more optional detail about the activity

24   Click here.

Signature Activity ⓘ

Funded by an LCIF Grant ⓘ

Venue ⓘ

Start Time ⓘ

End Time ⓘ

Venue Time Zone ⓘ

--None--

Service Ac
SA-052

le
xample Club SA

tails   I

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Record Type
Meeting

Title ⓘ
Example Club
July

Sponsor ⓘ
Example Club For Training

Activity Level
Lions Club

Cause
Administration

Project Type
Activities in Strengthening Club

ppy   Delete

a...

ab to begin

Cancel   Save

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25   Click "Save" to save your data entry

Venue Location (City)

Venue Location
(State/Province)

Venue Location (ZIP/Postal Code)

--Nc

Sponsor Details

Sponsor CA ⓘ
U.S. and Affiliates, Bermuda and Bahamas

Sponsor MD ⓘ
Multiple District 1

Sponsor District ⓘ
District 1 J

Service Ac
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Record Type
Meeting

Title ⓘ
Example Club
July

Sponsor ⓘ
Example Club For Training

Activity Level
Lions Club

Cause
Administration

Project Type
Activities in Strengthening Club

ppy   Delete

a...

ab to begin

Cancel   Save

14

26 When saved a green "Success!" message will appear. Click the "X" to close the message.

Tip! When the end date of the activity has passed, the status will be set to "Ready To Report".

27   This Service Activity is "Ready to Report"

Details   Image Gallery

Imag...   Uploa...

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

∨ Information

Record Type
Meeting

Report Complete ⓘ
☐

Title ⓘ
Example Club SA1 - Club Meeting
July

Sponsor ⓘ
Example Club For Training

Cause
Administration

Activity Level
Lions Club

Project Type
Activities in Strengthening Club

Status ⓘ
Ready to Report

Description ⓘ
Records the description of the
activity

Start Date ⓘ
7/5/2024

Created By
Example One, 9/15/2024, 6:21
PM

End Date ⓘ
7/5/2024

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28   To report the activity complete. Click the pencil icon next to "Report Complete"

Service Activity
SA-05292416

Edit   Copy   Delete

le
xample Club SA1 - Club Meeting July

Sponsor
Example Club For Training

Status
Ready to Report

etails   Image Gallery

Imag...   Uploa...

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

∨ Information

Record Type
Meeting

Report Complete ⓘ
☐

Title ⓘ
Example Club SA1 - Club Meeting
July

Sponsor ⓘ
Example Club For Training

Cause
Administration

Activity Level

Project Type

16

29 Click the "Report Complete" field.

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

Cancel   Save

* Sponsor ⓘ

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30 Click "Save"

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

Cancel   Save

* Sponsor ⓘ

Copy A Service Activity

ⓘ   Tip! If this a a recurring activity (of any type) setting up future activities now can save time in the future!

31   Click "Copy"

ⓘ   Tip! You are brought to the newly created activity from the copy button.

32 When copied a green "Success!" message will appear. Click the "X" to close the message.

33 Click "Edit"

34   It is recommended you make the title unique! Click the "Title" to edit

35   Type "Aug"

⚠️   Alert! Start and End dates are not copied from the activity. These must be entered.

36 Click the "*Start Date" field and enter the date. Repeat for the "End Date"

37 Click the "Total Volunteers" field.

38 If needed update the "Total Volunteers" and "Total Volunteer Hours" and any other metrics

39 Scroll back to the top and Click the "Report Complete" field.

40   Click "Save"

41   When saved a green "Success!" message will appear. Click the "X" to close the message. Your Service Activity has been reported.

42   To return to the Club detail click the Club Name or the "Details" tab

| Search | | Search | 🔔 | 👤 |

Home   Membership ⌄   Service ⌄   Learn   More ⌄

Service Activity
SA-05292417   Edit   Copy   Delete

Title   Sponsor   Status
Example Club SA2 - Club Meeting Aug   Example Club For Training   Reported

Example Club For Training   ✕

Details   Image Gallery   ...mag...   Uploa...

Lion ID   Type
200158   Lions Club

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

⌄ Information   the **Upload Images** tab to begin
                                                 ...oading images.
Record Type
Meeting

Title ⓘ
Example Club SA2 - Club Mee...

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43   Click "Club Service Activities" to view the newly created Service Activities

Account
Example Club For Training   + Follow

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

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

Account Name   Type ⓘ
Example Club For Training   ✎   Lions Club   **Manage Club Members**

Parent Account ⓘ   Active Member Count
District 1 J   50

Region or Zone ⓘ   Club Specialty ⓘ   **Manage Club Officers**
SE Zone 1   Cultural

Lion ID ⓘ   Club Sub-Specialty ⓘ
200158   **Manage Cub Club**

44 The Service Activities list is shown

	End Date	Title	Service Acti...	Start Date	Re
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 Click "Home" to return to the main landing page

Search   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

Member ...   Club Acti...

Service Activities (2)

2 items • Updated a minute ago   Manage Club Members

	End Date	Title	Service Acti...	Start Date	Re

46 This concludes the "Service Activities - Create, Report, Copy A Meeting Activity" Quick Guide

Welcome Example One!

MY MEMBERSHIP

MY CLUB

MY CA

MY ASSOCIATION