

Service Activities - Create, Report, Copy A Meeting Activity



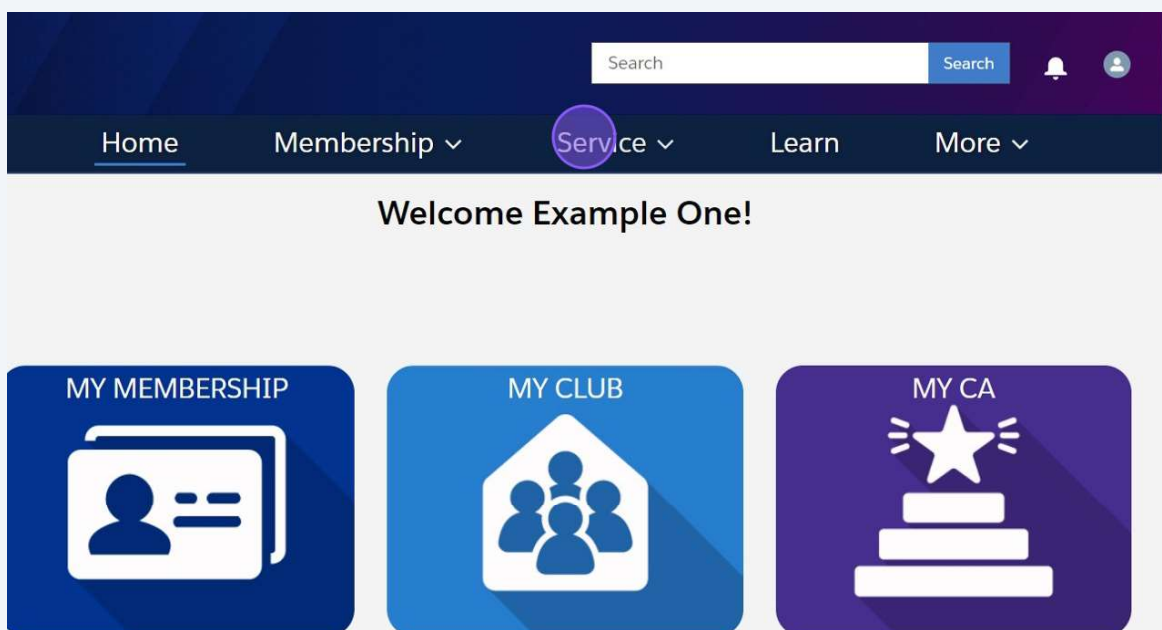
This guide is essential for anyone looking to efficiently manage activities within the Lion Portal. It provides step-by-step instructions on creating, reporting, and copying service activities, specifically focusing on meetings, which now have their own reporting metrics. By following this guide, users 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.

i Tip! Meeting activities now have their own classification for reporting. Metrics for these type of activities are grouped under "Meetings".

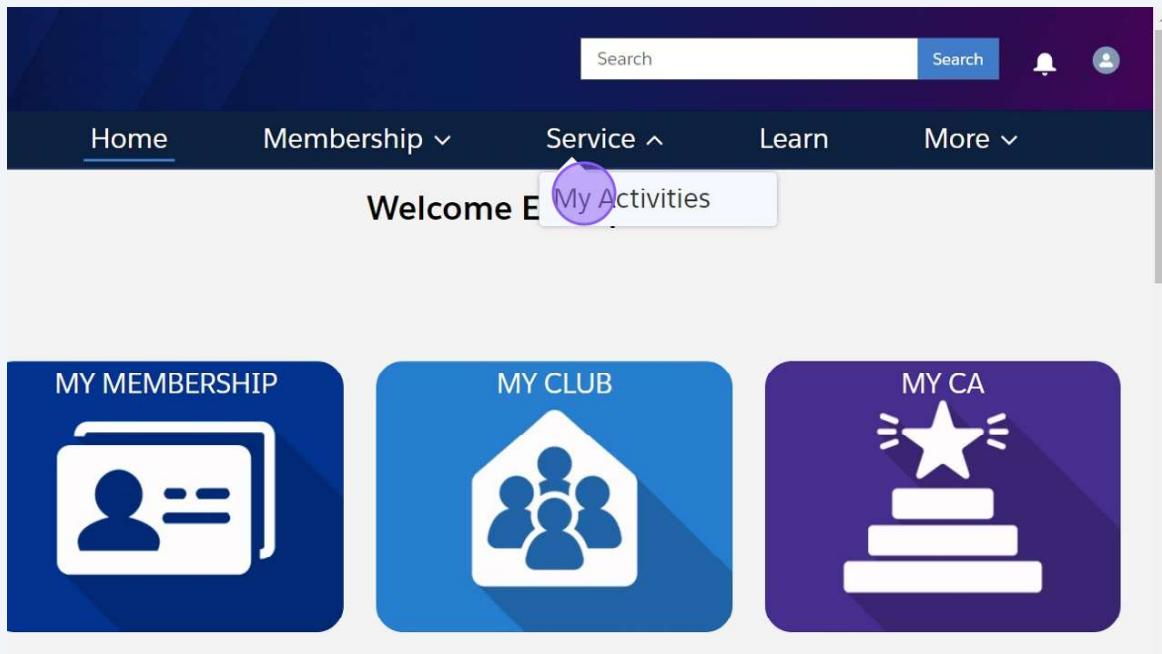
This Quick Guide covers creating, reporting, copying and then reporting the new activity for the Meeting Activity type.

1 Sign in to the Lion Portal. lionportal.org

2 Click "Service"

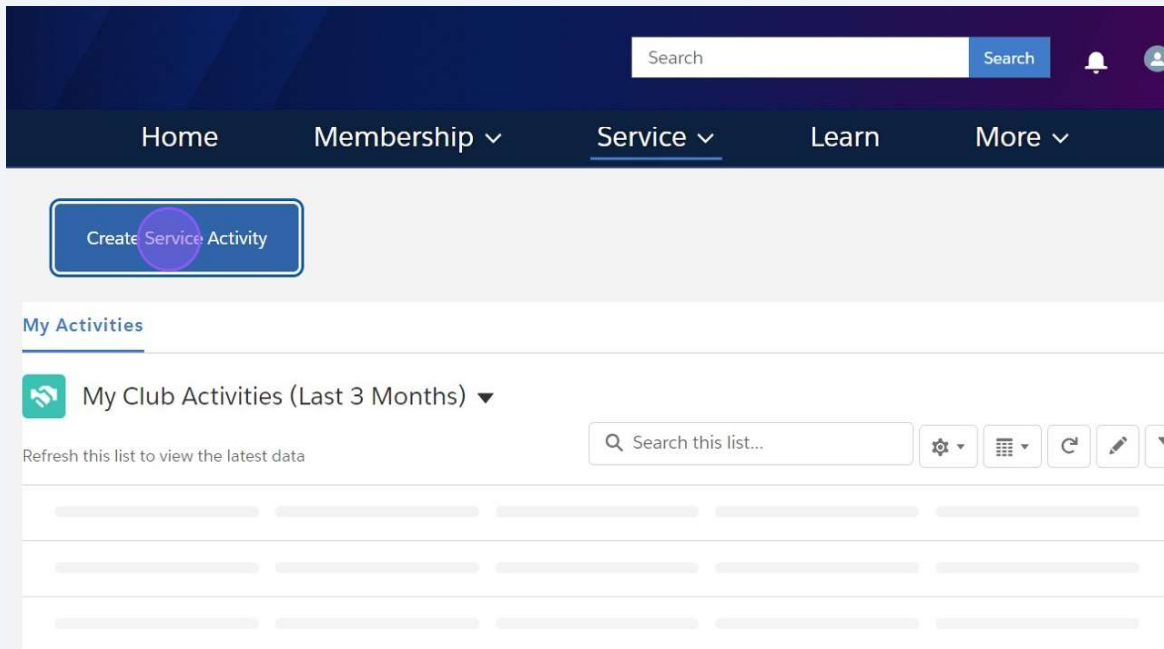



3 Click "My Activities"



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.

Create Service Activity

Search for a Leo Club, Lions Club, or District in your hierarchy based on the position you hold or select from your specific area.

☐ Search for Leo Club, Lions Club, or District

☒ Select from my specific area

1 of 1 item • 0 items selected

Search this list...

<input type="checkbox"/>	Name	Type
<input type="checkbox"/>	Example Club For Training	Lions Club

Next

6

Click "Next"

Create Service Activity

Search for a Leo Club, Lions Club, or District in your hierarchy based on the position you hold or select from your specific area.

☐ Search for Leo Club, Lions Club, or District

☒ Select from my specific area


1 of 1 item • 1 item selected

Search this list...

<input checked="" type="checkbox"/>	Name	Type
<input checked="" type="checkbox"/>	Example Club For Training	Lions Club

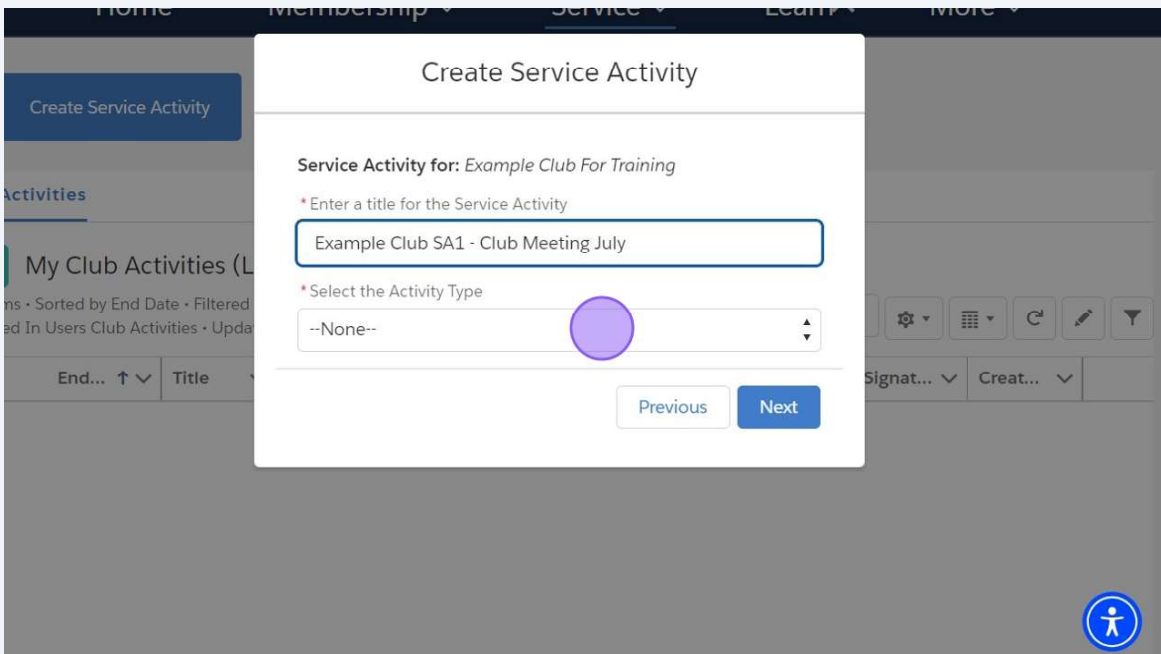
Next

7 Enter a Title for the Service Activity

 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



The screenshot shows a 'Create Service Activity' modal window. The title of the modal is 'Create Service Activity'. Below the title, it says 'Service Activity for: Example Club For Training'. There are two required fields: a text input field labeled '* Enter a title for the Service Activity' containing the text 'Example Club SA1 - Club Meeting July', and a dropdown menu labeled '* Select the Activity Type' currently showing '--None--'. At the bottom of the modal are 'Previous' and 'Next' buttons. The background is a blurred view of a web application showing a 'My Club Activities' list and a 'Create Service Activity' button.

9

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

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

Meeting

Previous Next

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

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

Activity Level

Project Type

Image Gallery

Imag... Uploa...

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

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

The screenshot shows the top navigation bar with a search bar and links for Home, Membership, Service, Learn, and More. Below the navigation bar, the Service Activity SA-05292416 is displayed. The 'Edit' button is highlighted with a purple circle. The page shows details for the activity, including the title 'Example Club SA1 - Club Meeting July', the sponsor 'Example Club For Training', and the status 'Draft'. There are tabs for 'Details' and 'Image Gallery'. The 'Details' tab is active, showing the 'Information' section with fields for Record Type (Meeting), Report Complete (checkbox), Title (Example Club SA1 - Club Meeting), and a 'Save' button.

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

The screenshot shows the 'Edit SA-05292416' pop-up form. The form has a title bar 'Edit SA-05292416' and a legend '* = Required Information'. The 'Information' section contains fields for Record Type (Meeting), Report Complete (checkbox), Title (Example Club SA1 - Club Meeting July), Sponsor (Example Club For Training), Cause (Administration), Activity Level (Lions Club), and Project Type (Activities in Strengthening Club). A tooltip is displayed over the Title field, stating 'This field cannot be changed after the event is created'. The form also includes a 'Cancel' button and a 'Save' button.

13 You can scroll through the form

The screenshot shows a mobile application interface for creating a Service Activity. A modal form is displayed over a background list of activities. The form is titled "Meeting" and contains the following fields:

- Title:** "Example Club SA1 - Club Meeting Ju"
- Sponsor:** "Example Club For Training" (with a close button)
- Activity Level:** "Lions Club" (with a note: "This field is calculated upon save")
- Status:** "Draft" (with a note: "This field is calculated upon save")
- Cause:** "Administration" (with a dropdown arrow and a link: "View all dependencies")
- Project Type:** "Activities in Strengthening Club" (with a dropdown arrow and a link: "View all dependencies")
- Description:** An empty text field with a purple circle highlighting it.

At the bottom of the form are "Cancel" and "Save" buttons. The background shows a list of activities with columns for Record Type, Title, Sponsor, Activity Level, Cause, Project Type, and Description.

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

This screenshot is similar to the previous one, but the "Description" field is now highlighted with a purple circle, indicating it is the focus for data entry. The "Created By" field at the bottom right now shows "Example One, 9/15/2024, 6:21 PM".

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

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: (Highlighted with a purple circle, placeholder text M/d/yyyy)
- End Date: (Placeholder text M/d/yyyy)

Buttons: Cancel, Save

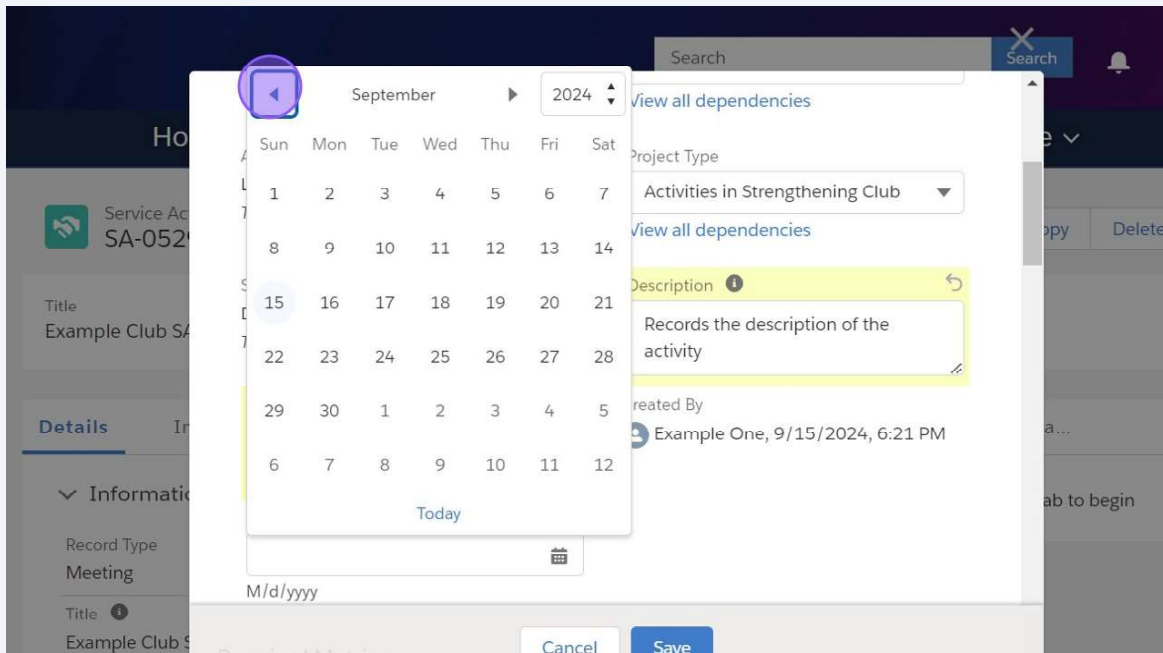
- 16 Click the "End Date" field.

The screenshot shows the same form as above, but with the 'End Date' field highlighted by a purple circle. The 'Start Date' field now contains the value '7/5/2024'.

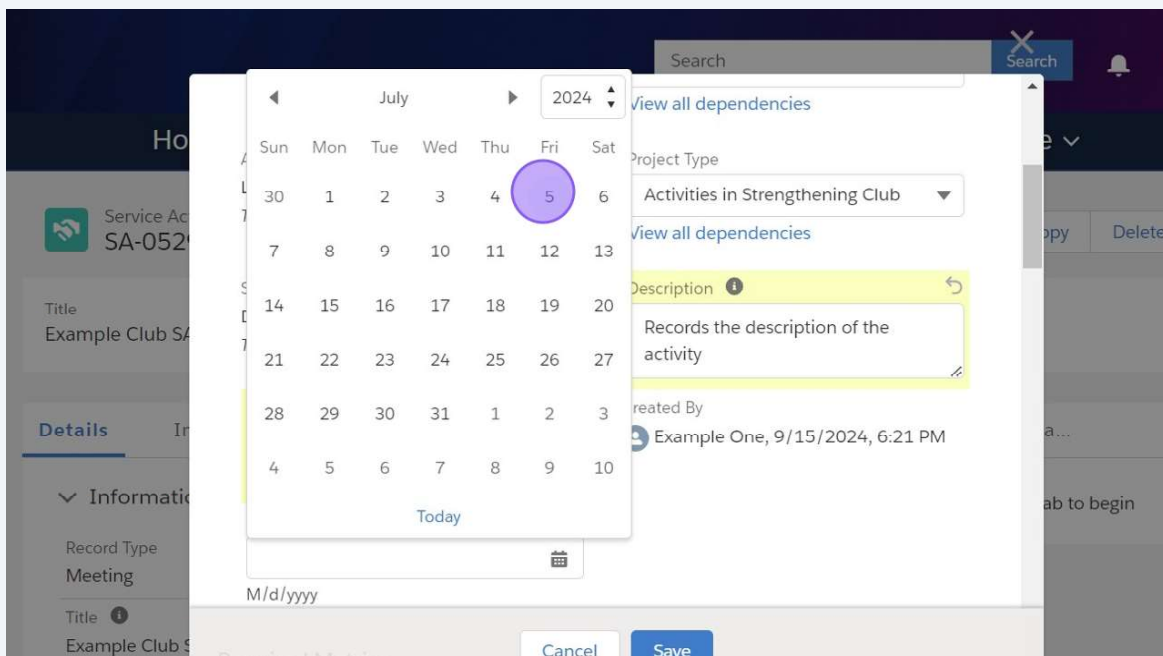
- Activity Level: Lions Club (This field is calculated upon save)
- Status: Draft (This field is calculated upon save)
- Project Type: Activities in Strengthening Club (View all dependencies)
- Description: Records the description of the activity
- Created By: Example One, 9/15/2024, 6:21 PM
- * Start Date: 7/5/2024 (M/d/yyyy)
- End Date: (Highlighted with a purple circle, placeholder text M/d/yyyy)

Buttons: Cancel, Save

- 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

The screenshot shows a form with a 'Required Metrics' section. The 'Total Volunteers' field is highlighted with a purple circle. The 'End Date' field is set to 7/5/2024. The 'Optional Metrics' section is partially visible at the bottom.

End Date ⓘ 7/5/2024 M/d/yyyy

Required Metrics

Total Volunteers ⓘ

Non-Lions Participated ⓘ ☐

Non-Lion Family Members Participated ⓘ ☐

Total Volunteer Hours ⓘ

Optional Metrics

Cancel Save

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

The screenshot shows a form with a 'Required Metrics' section. The 'Total Volunteer Hours' field is highlighted with a purple circle. The 'Total Volunteers' field is set to 30. The 'Optional Metrics' section is partially visible at the bottom.

Required Metrics

Total Volunteers ⓘ 30

Non-Lions Participated ⓘ ☐

Non-Lion Family Members Participated ⓘ ☐

Total Volunteer Hours ⓘ

Optional Metrics

People Served ⓘ

Currency USD - U.S. Dollar

Cancel Save



Tip!

Total Funds Donated is required for a "Donation" Service Activity type
Total Funds Raised is required for a "Fundraiser" Service Activity type

Funds can be entered in local currency by selecting "Currency" and changing the currency type.

21

Scrolling further, more metrics are displayed.

The screenshot shows a mobile application interface with a form for entering donation metrics. The form is overlaid on a background that shows a list of service activities. The form fields are as follows:

- Currency:** A dropdown menu showing "USD - U.S. Dollar".
- Total Funds Raised:** A text input field.
- Total Funds Raised (USD):** A text input field showing "0.00".
- Total Funds Donated:** A text input field.
- Total Funds Donated (USD):** A text input field showing "0.00".
- Organization Benefited:** A text input field.
- Donation to LCIF:** A checkbox.

At the bottom of the form, there are two buttons: "Cancel" and "Save". A purple circle highlights the "Save" button. The background shows a list of service activities with columns for "Service Activity", "Record Type", "Title", "Sponsor", "Cause", "Project Type", and "Activities in Strengthening Club".

22 Continue to Scroll

Additional Details

Signature Activity *i*
☐

Funded by an LCIF Grant *i*
☐

Venue *i*

Start Time *i*

End Time *i*

Venue Time Zone *i*
--None--

Cancel Save

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

Funded by an LCIF Grant *i*
☐

Venue *i*

Start Time *i*

End Time *i*

Venue Time Zone *i*
--None--

Venue Location *i*

Venue Location (Country/Territory) *i*

Cancel Save

24 Click here.

Signature Activity ⁱ
☐

Funded by an LCIF Grant ⁱ
☐

Venue ⁱ

Start Time ⁱ

End Time ⁱ

Venue Time Zone ⁱ
--None--

Venue Location ⁱ
Venue Location (Country/Territory)

Cancel Save

25 Click "Save" to save your data entry

Venue Location (City)

Venue Location (State/Province)
--Nc--

Venue Location (ZIP/Postal Code)

Sponsor Details

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

Sponsor District ⁱ
District 1 J

Sponsor MD ⁱ
Multiple District 1

Cancel Save

26

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

Service Activity "a29Nq000001k5LtIAI" was saved. [X]

Search [bell icon] [user icon]

Home Membership ▾ Service ▾ Learn More ▾

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 [share icon]

Report Complete ☐ [info icon] [edit icon]

Title [edit icon]

Image Gallery

Imag... Uploa...

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



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

Information

Record Type	Report Complete
Meeting	<input type="checkbox"/>
Title	
Example Club SA1 - Club Meeting July	
Sponsor	Cause
Example Club For Training	Administration
Activity Level	Project Type
Lions Club	Activities in Strengthening Club
Status	Description
Ready to Report	Records the description of the activity
Start Date	Created By
7/5/2024	Example One, 9/15/2024, 6:21 PM
End Date	
7/5/2024	

Imag... Uploa...

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

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

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	Report Complete
Meeting	<input type="checkbox"/>
Title	
Example Club SA1 - Club Meeting July	
Sponsor	Cause
Example Club For Training	Administration
Activity Level	Project Type

Imag... Uploa...

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

29 Click the "Report Complete" field.

The screenshot shows a web interface for a 'Service Activity' with ID 'SA-05292416'. At the top, there are buttons for 'Edit', 'Copy', and 'Delete'. Below this is a header section with 'Title' (Example Club SA1 - Club Meeting July), 'Sponsor' (Example Club For Training), and 'Status' (Ready to Report). The main content area has two tabs: 'Details' and 'Image Gallery'. The 'Details' tab is active, showing a form with a 'Report Complete' checkbox. A purple circle highlights the 'Report Complete' checkbox. To the right of the checkbox is an information icon. Below the checkbox are 'Cancel' and 'Save' buttons. A note on the right side of the form says 'Use the Upload Images tab to begin uploading images.'

30 Click "Save"

The screenshot shows the same web interface as the previous one, but now the 'Report Complete' checkbox is checked. A yellow highlight is around the 'Report Complete' checkbox and its label. A purple circle highlights the 'Save' button. The 'Cancel' button is also visible. The 'Image Gallery' tab is still active, and the 'Upload Images' tab is also visible. The 'Save' button is a blue button with white text.



This completes Creating and Reporting a Service Activity

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"

The screenshot shows a web application interface for managing Service Activities. At the top, there is a dark blue header with a search bar and navigation links: Home, Membership, Service, Learn, and More. Below the header, the main content area displays details for a Service Activity with ID SA-05292416. The activity title is 'Example Club SA1 - Club Meeting July', the sponsor is 'Example Club For Training', and the status is 'Reported'. There are three buttons: 'Edit', 'Copy' (highlighted with a purple circle), and 'Delete'. Below the activity details, there is a section for 'Image Gallery' with tabs for 'Details' and 'Image Gallery'. The 'Details' tab is active, showing a form with fields for 'Record Type' (set to 'Meeting'), 'Report Complete' (checked), and 'Title' (set to 'Example Club SA1 - Club Meeting'). To the right of the form, there is a section for 'Image Gallery' with a tab for 'Image Gallery' and a button for 'Upload Images'. A message states: 'Use the Upload Images tab to begin uploading images.'



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.

The screenshot shows a web application interface. At the top, a green success message banner reads: "Success! Success! Here is your copied activity. Begin editing now." with a close button (X) on the right. Below the banner is a navigation bar with links: Home, Membership, Service, Learn, and More. The main content area displays a "Service Activity" form for "SA-05292417". The form includes fields for "Title" (Example Club SA1 - Club Meeting July), "Sponsor" (Example Club For Training), and "Status" (Draft). There are "Edit", "Copy", and "Delete" buttons. Below the form, there is a section for "Information" with fields for "Record Type" (Meeting) and "Report Complete" (checkbox). To the right of the form, there is a section for "Image Gallery" with a tab labeled "Image..." and a button labeled "Uploa...". A message below the tab says: "Use the Upload Images tab to begin uploading images."

33

Click "Edit"

The screenshot shows the same web application interface as the previous one, but the "Edit" button is highlighted with a purple circle. The success message banner is no longer visible. The navigation bar and form fields remain the same. The "Image Gallery" section is also visible on the right.

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

Edit SA-05292417

* = Required Information

Information

Record Type
Meeting

Report Complete

* Title
Example Club SA1 - Club Meeting Ju

* Sponsor
Example Club For Training X

Cause
Administration
[View all dependencies](#)

Activity Level
Lions Club

Project Type
Activities in Strengthening Club

This field is calculated upon save

Cancel Save

- 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"

This field is calculated upon save

Status ⓘ
Draft
This field is calculated upon save

Description ⓘ
Records the description of the activity

*Start Date ⓘ
[Date field with a purple circle highlighting the input area]
M/d/yyyy

End Date ⓘ
[Date field]
M/d/yyyy

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

Required Metrics

Total Volunteers ⓘ
30

Cancel Save

- 37 Click the "Total Volunteers" field.

End Date ⓘ
8/5/2024
M/d/yyyy

Required Metrics

Total Volunteers ⓘ
[Date field with a purple circle highlighting the input area]

Non-Lions Participated ⓘ
☐

Non-Lion Family Members Participated ⓘ
☐

Total Volunteer Hours ⓘ
30.00

Optional Metrics

Cancel Save

38

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

Service Account SA-05292417

M/d/yyyy

Required Metrics

Total Volunteers ⓘ

Non-Lions Participated ⓘ ☐

Non-Lion Family Members Participated ⓘ ☐

Total Volunteer Hours ⓘ

Optional Metrics

People Served ⓘ

Cancel Save

Record Type: Meeting

Title ⓘ: Example Club SA2 - Club Meeting At July

Sponsor ⓘ: Example Club For Training

Cause: Administration

Project Type: Activities in Strengthening Club

39

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

Search

Edit SA-05292417

* = Required Information

Information

Record Type: Meeting

*Title ⓘ

*Sponsor ⓘ

Cause: Administration

Project Type: Activities in Strengthening Club

Report Complete ⓘ ☐

View all dependencies

Activity Level: Lions Club

This field is calculated upon save

Cancel Save

40 Click "Save"

Information

Record Type
Meeting

* Title ⓘ
Example Club SA2 - Club Meeting Au

* Sponsor ⓘ
Example Club For Training

Report Complete ⓘ
☒

Cause
Administration

Project Type
Activities in Strengthening Club

Activity Level
Lions Club

This field is calculated upon save

Cancel Save

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

Service Activity "a29Nq00001k5NVIAY" was saved

Home Membership Service Learn More

Service Activity
SA-05292417

Edit Copy Delete

Title
Example Club SA2 - Club Meeting Aug

Sponsor
Example Club For Training

Status
Reported

Image Gallery

Information

Record Type
Meeting

Title ⓘ
Example Club SA2 - Club Meeting

Report Complete ⓘ
☒

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

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

The screenshot shows a web interface for service activities. At the top, there is a search bar and navigation tabs: Home, Membership, Service, Learn, and More. Below the navigation, a service activity is listed with the title 'Example Club SA2 - Club Meeting Aug', sponsor 'Example Club For Training', and status 'Reported'. A modal window titled 'Example Club For Training' is open, displaying club details. The modal has a 'Details' tab selected. The details include: Lion ID 200158, Type Lions Club, Status Active, Billing Address 124 Any Place, Naperville, Illinois 60565, United States. The modal also has an 'Image Gallery' tab and an 'Upload Images' button.

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 Aug

Lion ID
200158

Type
Lions Club

Status
Active

Billing Address
124 Any Place
Naperville, Illinois 60565
United States

mag... Uploa...

the Upload Images tab to begin loading images.

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

The screenshot shows the 'Club Service Activities' page for 'Example Club For Training'. The page has a header with the club name and a '+ Follow' button. Below the header, there is a table with club details: Lion ID 200158, Type Lions Club, Status Active, Billing Address 124 Any Place, Naperville, Illinois 60565, United States, and Active Member Count 50. The 'Club Service Activities' tab is selected, showing a list of service activities. The 'Club Details' tab is also visible, showing account information: Account Name Example Club For Training, Parent Account District 1 J, Region or Zone SE Zone 1, Lion ID 200158, and Youth Program. The 'Member ...' tab is also visible, showing buttons for 'Manage Club Members', 'Manage Club Officers', and 'Manage Club Club'.

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

Parent Account
District 1 J

Region or Zone
SE Zone 1

Lion ID
200158

Youth Program

Type
Lions Club

Active Member Count
50

Club Specialty
Cultural

Club Sub-Specialty

Sociality Description

Manage Club Members

Manage Club Officers

Manage Club Club

44 The Service Activities list is shown

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

Service Activities (2)
2 items • Updated a minute ago

	End Date	Title	Service Acti...	Start Date	Re
--	----------	-------	-----------------	------------	----

Member ... Club Acti...

- Manage Club Members

