Service Activities - Full Walk-Through Quick Guide

This guide provides a comprehensive overview of creating and reporting Service Activities, particularly for fundraising and community service projects. It details essential data fields, roles responsible for reporting, and step-by-step instructions for using the Lion Portal effectively. By following this guide, users can efficiently manage their service projects, ensuring all necessary metrics are captured and reported accurately, promoting accountability and transparency within their clubs.

ⓘ Tip! This Quick Guide shows creating and reporting a Service Activity and all potential data field that can be captured and reported.

This Service Activity is a "Service Project" type activity, where funds were raised and some donated to a local community organization. Metrics for "Funds Raised" and "Funds Donated" were also reported.

⚠️ Alert! All Service Activities must have:

- Cause

- Project Type

- Description

- Start Date

- End Date

Additional Metrics for activity type:

- Service Project:

  - Total Volunteers

  - Total Volunteer Hours

  - People Served

- Fundraiser

  - Total Funds Raised

- Donation

  - Total Funds Donated

  - Organization Benefitted

- Meeting:

  - Total Volunteers

⚠️ Alert! While any club member can create and update a Service Activity, only designated title can report the Service Activity as "Complete".

Club Level Titles are:

- President

- Secretary

- Service Chair

- Club Administrator

District/Multiple District Titles (on behalf of the Club)

- District Governor

- Cabinet Secretary

- District/MD Administrator

1 Sign in to the Lion Portal. lionportal.org

2 Click "Service"
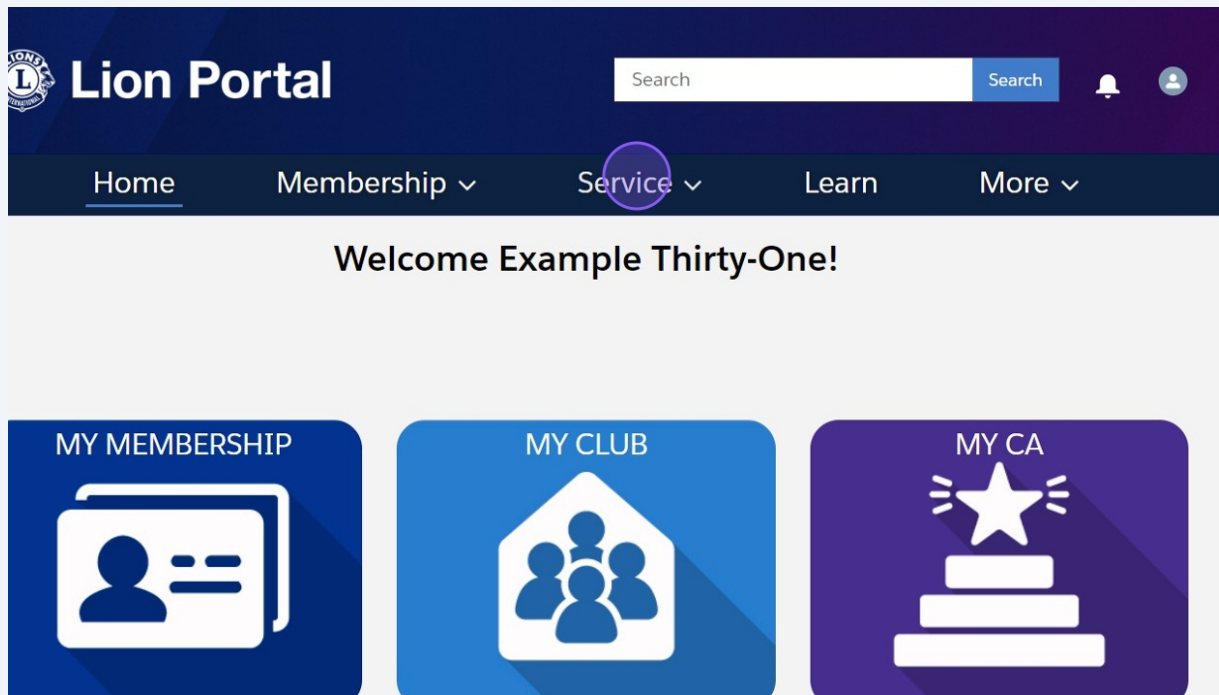
3 Click "My Activities"
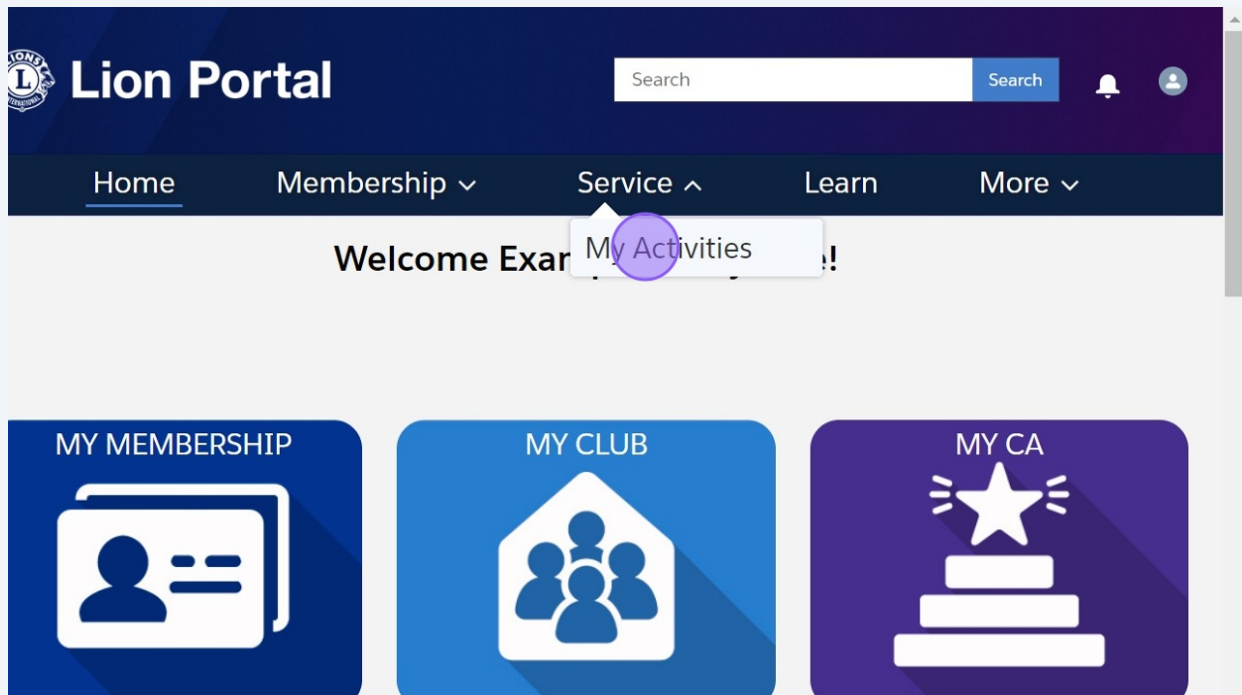
4 Club activities (Last 3 Months) is the default list. For other list options, click "Select a List View: Service Activities"
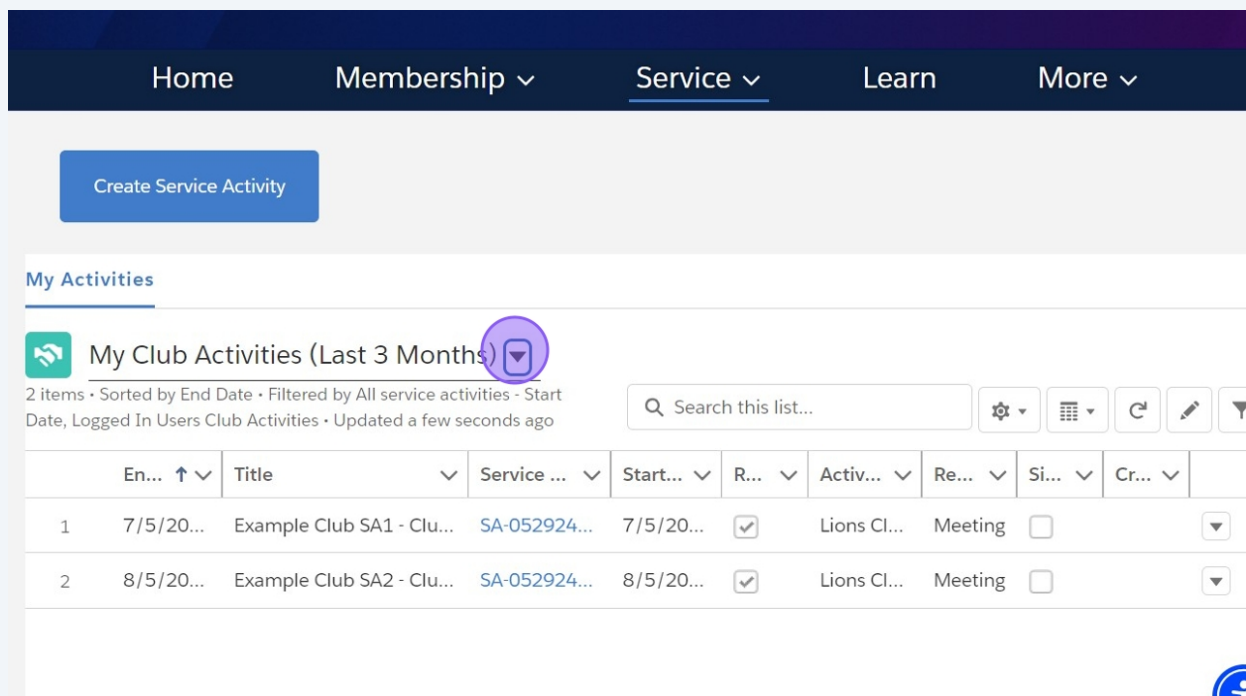
5 Other view options are displayed. Click in the drop down to change views.
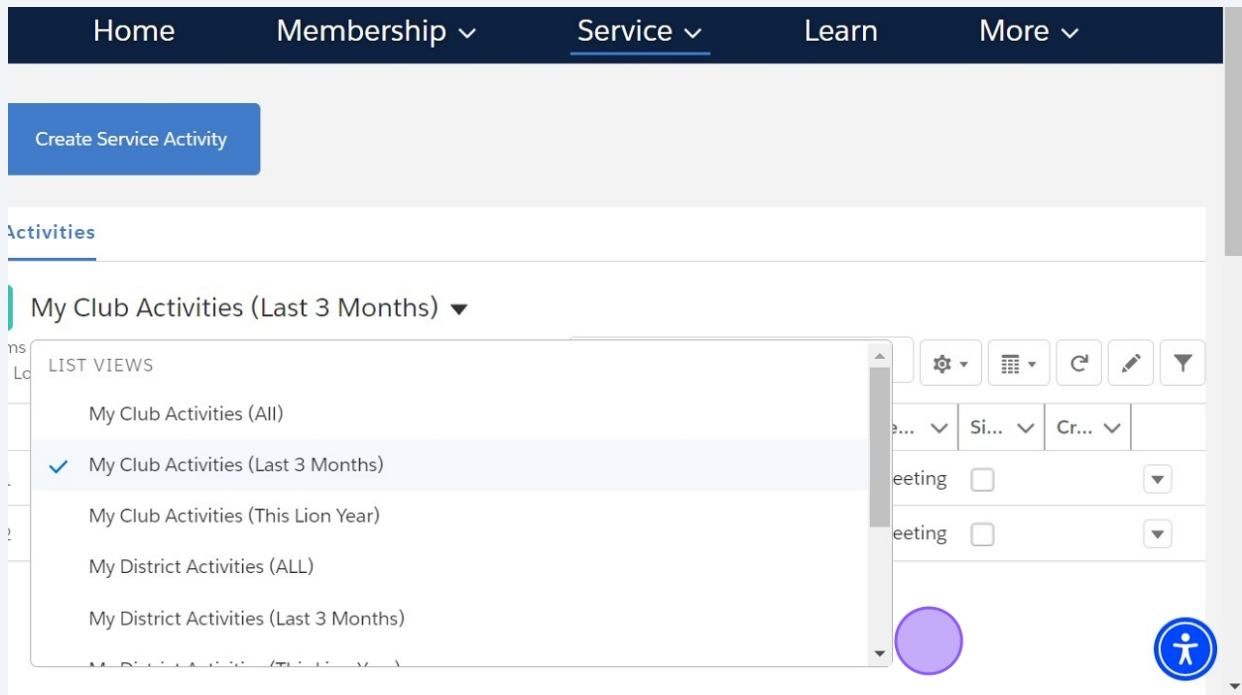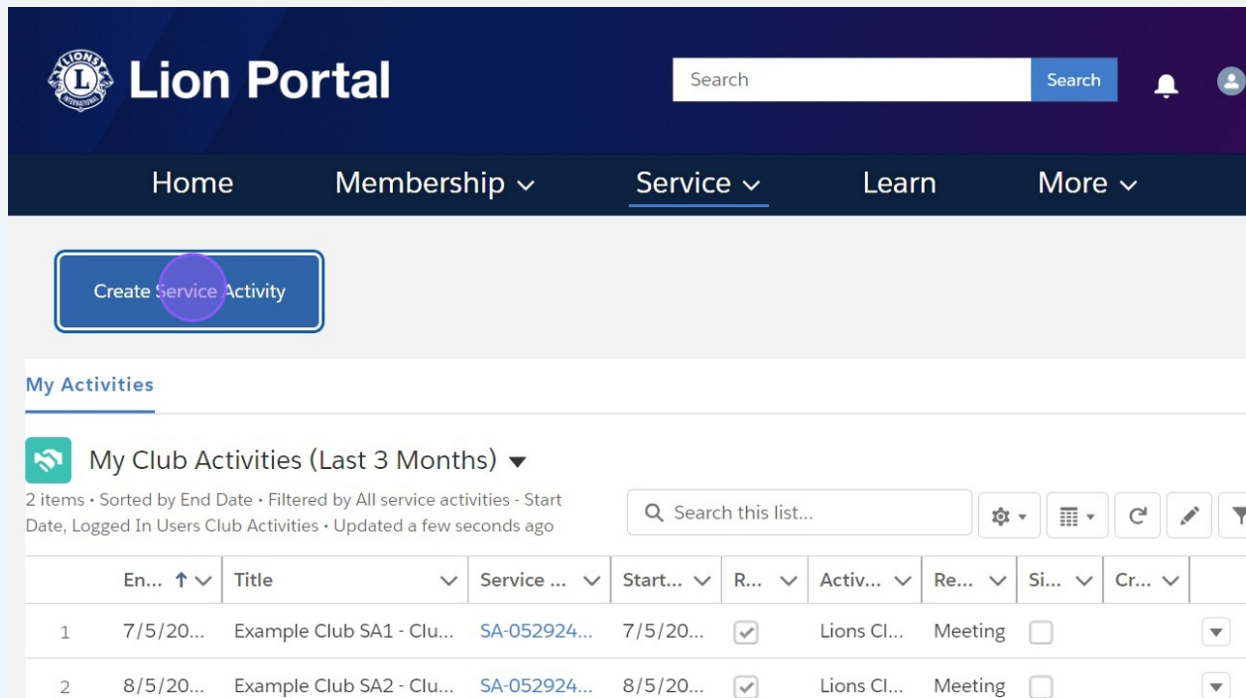

Create The Service Activity

Tip! Any Member of a Club can create a service activity and enter data and metrics. Activities can be saved at any time, with the ability to edit and add more detail at a later time.
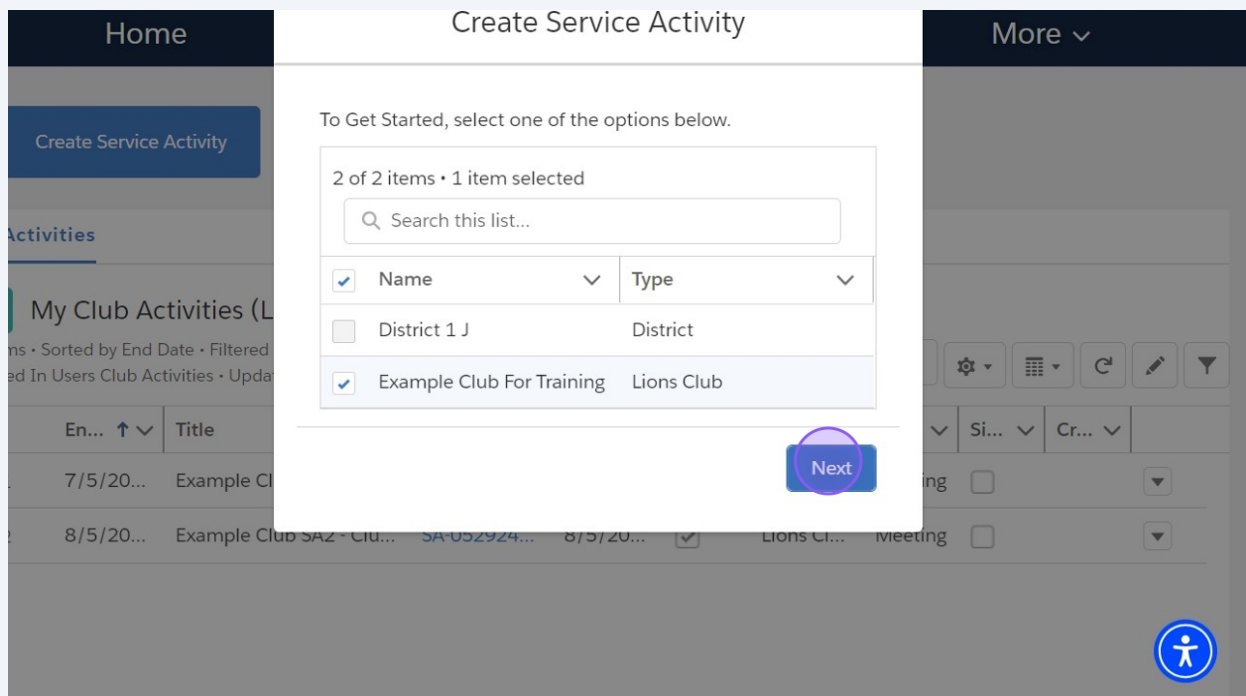
6 Click "Create Service Activity"

7 The entities for which you can create Service Activities are shown. Click the radio button to select the entity and click "Next"

8 Enter a name for the Service activity. Click the dropdown to select the activity type.

9 Click "Next"

Edit The Activity

10   A new Service Activity is created and the new activity is displayed.

Tip! The activity "Status" changes as time passes based on the "Start Date: of the activity.

   • Draft - No start date has been entered

   • Planned - The start date is greater than today's date

   • Ready To Report - The start date is equal to or less than today's date

   • Reported - The activity has been marked "Report Complete"

Alert! Activities cannot be reported as "Report Complete" until the END Date of the activity is today's date or in the past AND the required data has been reported for the activity type.

11 New activities are set to the "Status" of "Draft"

Lion Portal

Search   Search

Home   Membership ⌄   Service ⌄   Learn   More ⌄

Service Activity
SA-05292418

Edit   Copy   Delete

:le	Sponsor	Status
ample Club SA3 - Service Project	Example Club For Training	Draft

tails   Image Gallery   Imag...   Uploa...

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

∨ Information

Record Type
Service Project

Report Complete ⓘ
☐

Title ⓘ
Example Club SA3 - Service Project ✎

---

12 Scroll to see the full details of the activity.

Example Club For Training ✎

Activity Level	Project Type
Lions Club	
Status ⓘ	Description ⓘ
Draft	
Start Date ⓘ	Created By
	Example Thirty-One, 9/21/2024, 10:12 AM
End Date ⓘ	

∨ Required Metrics

People Served ⓘ

Total Volunteers ⓘ

Non-Lions Participated ⓘ
☐

Non-Lion Family Members Participated

13 To begin In-Line editing the activity click next to a pencil icon

14 The data fields are now editable. Continue to add data and scroll through the form

Title
xample Club SA3 - Service Project

Sponsor
Example Club For Training

Status
Draft

etails   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 SA3 - Service Proje

Cause

--None--   ▼

View all dependencies

Activity Level   Project Type

ⓘ Tip! To edit using a Popup Form follow these steps

15 Click "Edit" button in the upper right

16 The Popup Form is opened. Continue to add data and scroll through the Popup Form

Detail Example Of Entering data fields for a Service Activity

17 Click to select "Cause"

Record Type
Service Project

Report Complete ☐

* Title ⓘ

Example Club SA3 - Service Project

* Sponsor ⓘ

🔳 Example Club For Training ✕

* Cause

--None-- ▼

✓ --None--

Childhood Cancer

Diabetes

Disaster Relief

Environment

Other Humanitarian Service

Hunger

Vision

Activity Level
Lions Club
This field is calculated upon save

Status ⓘ
Draft

This field is calculated upon save

Cancel

Record Type
Service Project

Title ⓘ
Example Club S

Sponsor ⓘ
Example Club For Training ✎

Activity Level

Cause

Project Type

---

18 Click to open the Project Type drop down

Record Type
Service Project

Report Complete ⓘ ☐

* Title ⓘ

Example Club SA3 - Service Project

* Sponsor ⓘ

🔳 Example Club For Training ✕

* Cause ↺

Environment ▼

View all dependencies

Activity Level
Lions Club
This field is calculated upon save

Project Type

--None-- ▼

View all dependencies

Status ⓘ
Draft

Description ⓘ

This field is calculated upon save

Cancel   Save

Record Type
Service Project

Title ⓘ
Example Club S

Sponsor ⓘ
Example Club For Training ✎

Activity Level

Cause

Project Type

19   The list of "Project Types" is based on the "Cause" previously selected.

20   Click the "Description" field to add the description. A description is required to Report Complete.

21   Type the description.

22   Click the "*Start Date" field.

23 A date can be selected from the calendar.

24 The date can also be typed into the field.

25 This example is a Service Activity Project. People Served is a required metric. Click the "People Served" field to enter the data.

26 Enter the "People Served". There is a cap on this metric for activities reported at the Club level. Hover over the "i" to see the help description.

27 This example is a Service Activity Project. Total Volunteers is a required metric. Click the "Total Volunteers" field to enter the data.

28 Click the "Non-Lions Participated" field.

29 Click the "Non-Lion Family Members Participated" field.

30 This example is a Service Activity Project. Total Volunteer Hours is a required metric. Click the "Total Volunteer Hours" field to enter the data.

⚠️ Alert! Optional metrics can be entered for the Service Activity. Note there may be caps on Club metrics. While these can be captured, when the activity moves to Insights the metric(s) will be capped.

31 Click the "Total Funds Raised" field.

32 Cap description for funds raised.

Non-Lion Family Members Participated
☑

Total Volunteer Hours
225.00

Optional Metrics

Enter the total amount of finds raised for this service activity. A cap of 250000 per club service activity is applied when the activity is reported to LCI.

Currency
USD - U.S. Do

Total Funds Raised
250

Total Funds Raised (USD)
0.00

Total Funds Donated
125

Total Funds Donated (USD)
0.00

Donation to LCIF

Cancel   Save

33 Cap description for funds donated.

Total Volunteer Hours
225.00

Optional Metrics

Currency
USD - U.S. Dollar

Total Funds Raised
250

Enter the total amount of funds donated during this service activity. A cap of 200000 is applied when reported to LCI.

Total Funds Donated
125

Total Funds Donated (USD)
0.00

Donation to LCIF

Cancel   Save

⚠ Alert! If the activity donated funds, the organization benefited is required.

34 Click the "Organization Benefited" field.

ⓘ Tip! These are other optional data elements which can be entered for the Service Activity,

35 Optional! "Trees Planted/Cared for" field.

36 Optional! Click the "Signature Activity" field.

37 Optional! Click the "Venue" field.

38 Optional! Start Time

39 Optional! "End Time" field.

40 Optional! "Venue Time Zone" field.

41 Select from dropdown. Scroll to and Click the "Time Zone"

42 Details can be entered for the Venue location

43   Click the country of the venue

44   Optional! Address detail can be entered

Saving Entered Data

45   Click "Save"

Report Activity Complete

46 This activity meets the requirements to be reported complete.

Home	Membership ⌄	Service ⌄	Learn	More ⌄

Service Activity
SA-05292418

Edit   Copy   Delete

tle	Sponsor	Status
xample Club SA3 - Service Project	Example Club For Training	Ready to Report

tails   Image Gallery

Imag...   Uploa...

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

⌄ Information

Record Type
Service Project

Report Complete ⓘ
☐

Title ⓘ
Example Club SA3 - Service Project ✎

Sponsor ⓘ
Example Club For Training ✎

Cause
Environment ✎

Activity Level

Project Type

---

47 This activity meets the requirements to be reported complete.

Home	Membership ⌄	Service ⌄	Learn	More ⌄

Service Activity
SA-05292418

Edit   Copy   Delete

tle	Sponsor	Status
xample Club SA3 - Service Project	Example Club For Training	Ready to Report

tails   Image Gallery

Imag...   Uploa...

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

⌄ Information

Record Type
Service Project

Report Complete ⓘ
☐

Title ⓘ
Example Club SA3 - Service Project ✎

Sponsor ⓘ
Example Club For Training ✎

Cause
Environment ✎

Activity Level

Project Type

48   Double-click here.

Title
Example Club SA3 - Service Project

Sponsor
Example Club For Training

Status
Ready to Report

Details   Image Gallery

∨ Information

Record Type
Service Project

Report Complete ⓘ

Title ⓘ
Example Club SA3 - Service Project

Sponsor ⓘ
Example Club For Training

Cause
Environment

Activity Level
Lions Club

Project Type
Tree Planting and Tree Care

Status ⓘ
Ready to Report

Description ⓘ
Our Club partnered with the
village to plant 50 young trees on

Imag...   Uploa...

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

---

49   Click the "Report Complete" field to check the box.

Title
Example Club SA3 - Service Project

Sponsor
Example Club For Training

Status
Ready to Report

Details   Image Gallery

* = Required Information

∨ Information

Record Type
Service Project

Report Complete ⓘ

*Title ⓘ
Example Club SA3 - Service Proje

*Sponsor ⓘ
🏢 Example Club For Training ✕

*Cause
Environment ▼

Dependencies

Cancel   **Save**

Activity Level

Project Type

Imag...   Uploa...

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

50 Click "Save" to report complete.

Title
Example Club SA3 - Service Project

Sponsor
Example Club For Training

Status
Ready to Report

Details   Image Gallery

* = Required Information

∨ Information

Record Type
Service Project

Report Complete ⓘ
☑

* Title ⓘ
Example Club SA3 - Service Proje

* Sponsor ⓘ
🏢 Example Club For Training ✕

* Cause
Environment   ▼

Cancel   Save

Imag...   Uploa...

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

---

51 Click "Cancel" to cancel reporting complete

Title
Example Club SA3 - Service Project

Sponsor
Example Club For Training

Status
Ready to Report

Details   Image Gallery

* = Required Information

∨ Information

Record Type
Service Project

Report Complete ⓘ
☑

* Title ⓘ
Example Club SA3 - Service Proje

* Sponsor ⓘ
🏢 Example Club For Training ✕

* Cause
Environment   ▼

Cancel   Save

Imag...   Uploa...

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

Recap And Viewing Service Activities

52 To return the the "Club Page" Click the link to the Club as shown

Details Image Gallery

⌄ Information

Record Type
Service Project

Report Complete ⓘ
☐

Title ⓘ
Example Club SA3 - Service F

Sponsor ⓘ
Example Club For Training

Activity Level
Lions Club

Status ⓘ
Ready to Report

Our Club partnered with the
village to plant 50 young trees on
the lake walking path

Start Date ⓘ
9/15/2024

Created By
👤 Example Thirty-One , 9/21/2024,
10:12 AM

Imag...   Uploa...

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

---

53 Click "Club Service Activities"

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

Type ⓘ
Lions Club

Parent Account ⓘ
District 1 J

Active Member Count
56

Region or Zone ⓘ
SE Zone 1

Club Specialty ⓘ
Cultural

Lion ID ⓘ
200158

Club Sub-Specialty ⓘ

Member ...   Club Acti...

Manage Club Officers

Manage Cub Club
Leader

54   Click "View All Service Activities"

United States

| Details | Data Export | Club Statements | **Club Service Activities** | More |

Service Activities (3)

items · Updated a few seconds ago

End Date ∨	Title ∨	Service Acti... ∨	Start Date ∨	Re
7/5/2024	Example Club ...	SA-05292416	7/5/2024	☑
8/5/2024	Example Club ...	SA-05292417	8/5/2024	☑
9/15/2024	Example Club ...	SA-05292418	9/15/2024	☐

View All

| Member ... | Club Acti... |

Manage Club Officers

Manage Cub Club Leader

View Club Officers

| Club Me... | Club Offic... | More |

∨ Active Members

Active Members

---

55   Column widths can be adjusted for easier viewing. Click and drag as shown below.

Lion Portal

Search   Search

| Home | Membership ∨ | Service ∨ | Learn | More ∨ |

Accounts > Example Club For Training
Service Activities

3 items · Updated a few seconds ago

	End D... ∨	Title ∨	Service ... ∨	Start ... ∨	R... ∨	Activ... ∨	Record ... ∨	Si... ∨	Created... ∨	
1	7/5/2024	Example C...	SA-052924...	7/5/2024	☑	Lions Cl...	Meeting	☐		▼
2	8/5/2024	Example C...	SA-052924...	8/5/2024	☑	Lions Cl...	Meeting	☐		▼
3	9/15/20...	Example C...	SA-052924...	9/15/20...	☐	Lions Cl...	Service Pro...	☑	Example T...	▼

Report An Activity Complete From The Club Service Activity Tab

56 Scroll through the list to see the activity list. Select the activity to report by clicking the link to the Service Activity.

57 The Service Activity is opened. Double click the pencil icon to edit.

| Home | Membership ⌄ | Service ⌄ | Learn | More ⌄ |

Service Activity
SA-05292418

Edit   Copy   Delete

| :le | Sponsor | Status |
| xample Club SA3 - Service Project | Example Club For Training | Ready to Report |

etails   Image Gallery

Imag...   Uploa...

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

⌄ Information

Record Type
Service Project

Report Complete ⓘ
☐

Title ⓘ
Example Club SA3 - Service Project ✎

Sponsor ⓘ
Example Club For Training ✎

Cause
Environment ✎

---

58 Click the "Report Complete" field to check the box.

| Home | Membership ⌄ | Service ⌄ | Learn | More ⌄ |

Service Activity
SA-05292418

Edit   Copy   Delete

| Title | Sponsor | Status |
| Example Club SA3 - Service Project | Example Club For Training | Ready to Report |

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 SA3 - Servic   Cancel   Save

59 Click "Save" to complete the action.

| Home | Membership ⌄ | Service ⌄ | Learn | More ⌄ |

Service Activity
SA-05292418

Edit   Copy   Delete

| Title | Sponsor | Status |
| Example Club SA3 - Service Project | Example Club For Training | Ready to Report |

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 SA3 - Servic   Cancel   **Save**

---

60 The detail view is closed and returned to the Service Activity list. The activity is now showing reported complete.

| Home | Membership ⌄ | Service ⌄ | Learn | More ⌄ |

ccounts > Example Club For Training
ervice Activities

items · Updated a few seconds ago

	End D... ⌄	Title ⌄	Service ... ⌄	Start ... ⌄	R... ⌄	Activ... ⌄	Record ... ⌄	Si... ⌄	Created
	7/5/2024	Example Club SA1 - Club ...	SA-052924...	7/5/2024	☑	Lions Cl...	Meeting	☐	
	8/5/2024	Example Club SA2 - Club ...	SA-052924...	8/5/2024	☑	Lions Cl...	Meeting	☐	
	9/15/20...	Example Club SA3 - Servic...	SA-052924...	9/15/20...	☑	Lions Cl...	Service Pro...	☑	Exampl

61 To return to the Club Detail page, click the link to the club.

62 To return to the landing page click "Home"

63 This concludes the "Service Activities - Full Walk-Through" Quick Guide

Home	Membership ⌄	Service ⌄	Learn	More ⌄

Welcome Example Thirty-One!

MY MEMBERSHIP

MY CLUB

MY CA

MY ASSOCIATION