

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.

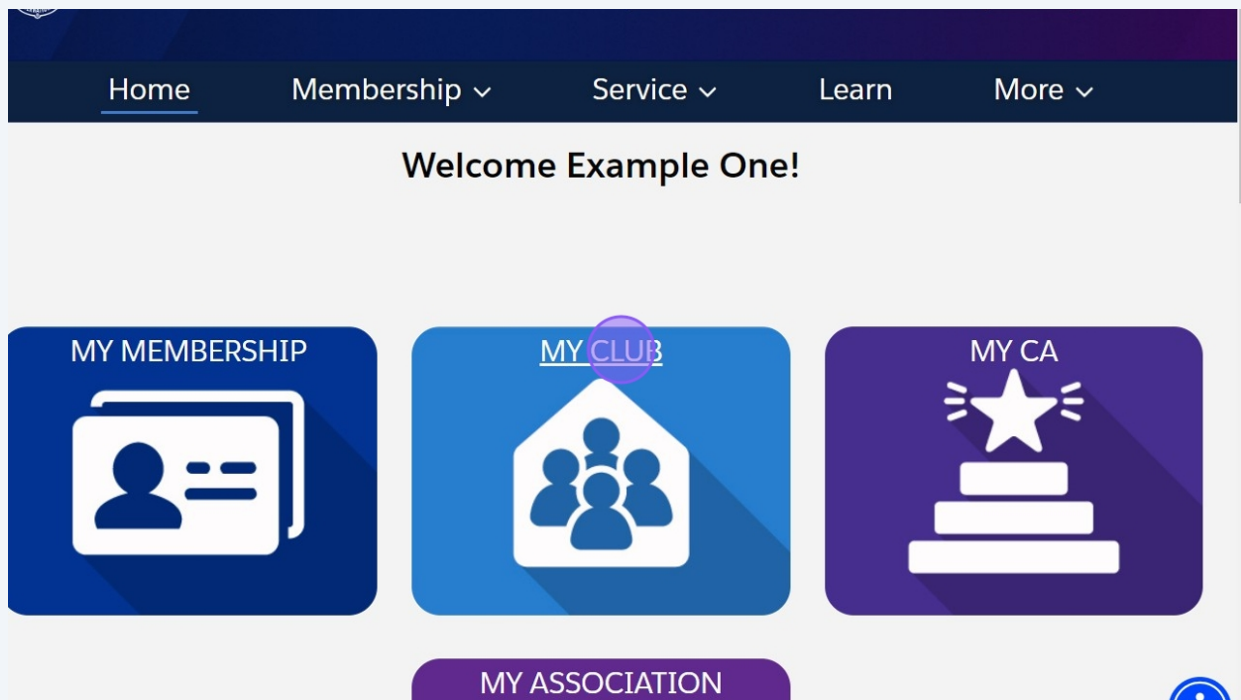
Titles that can assign officers at the individual Club level are:

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

1

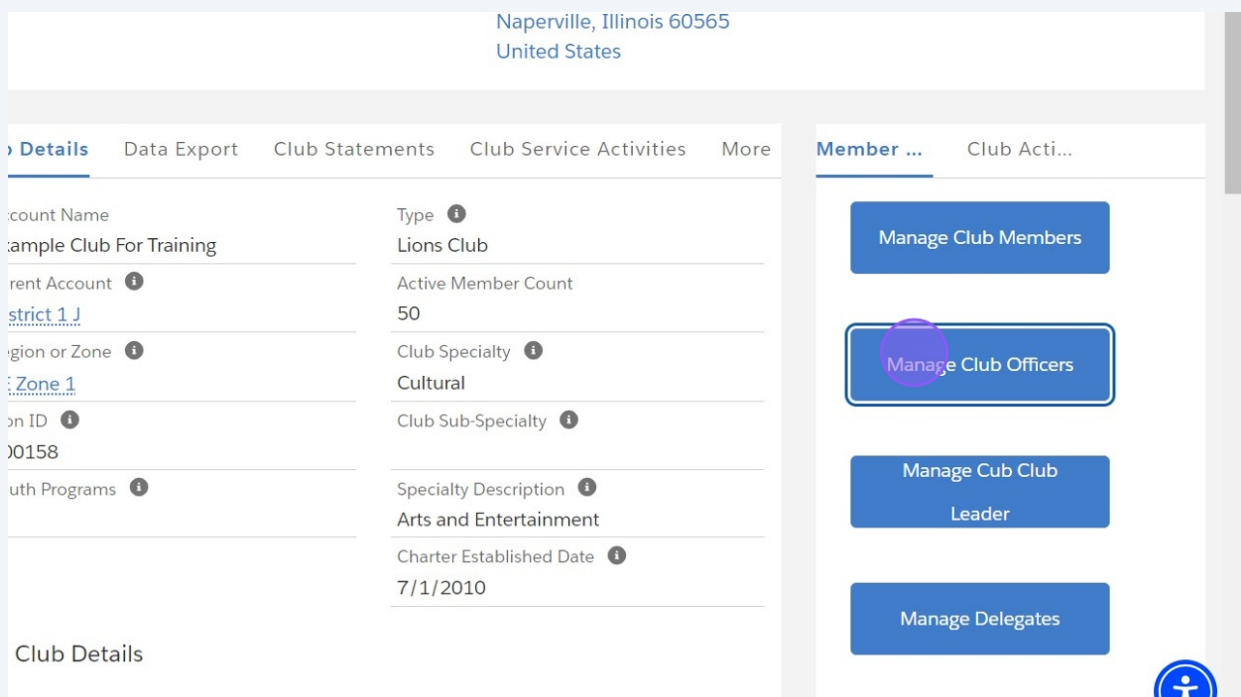
Sign in to the Lion Portal. lionportal.org

2 Click "MY CLUB"

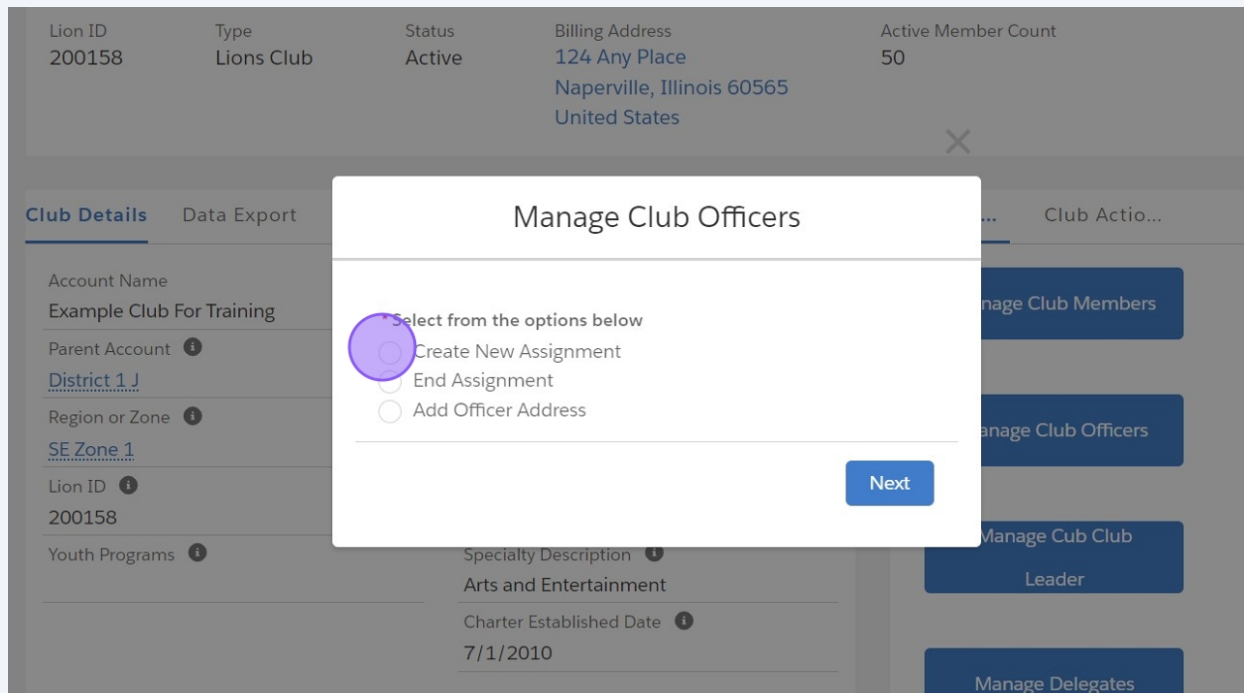


Create Officer Assignment

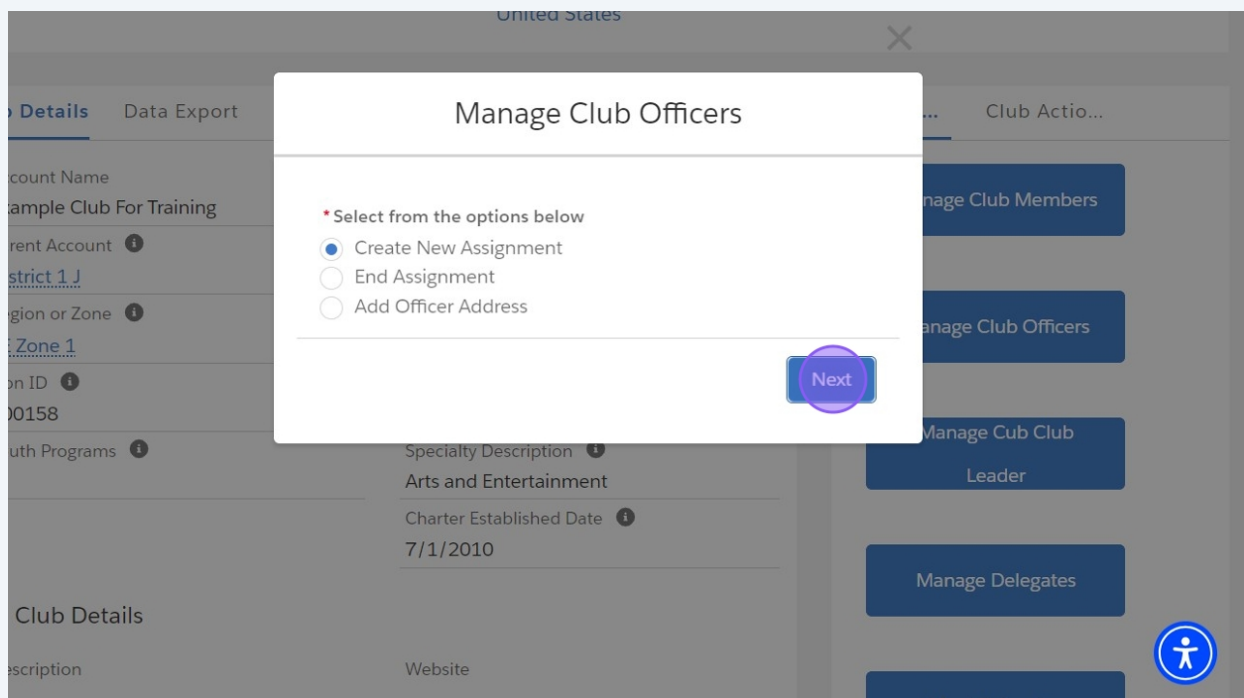
3 Click "Manage Club Officers"



4 Click "Create New Assignment"

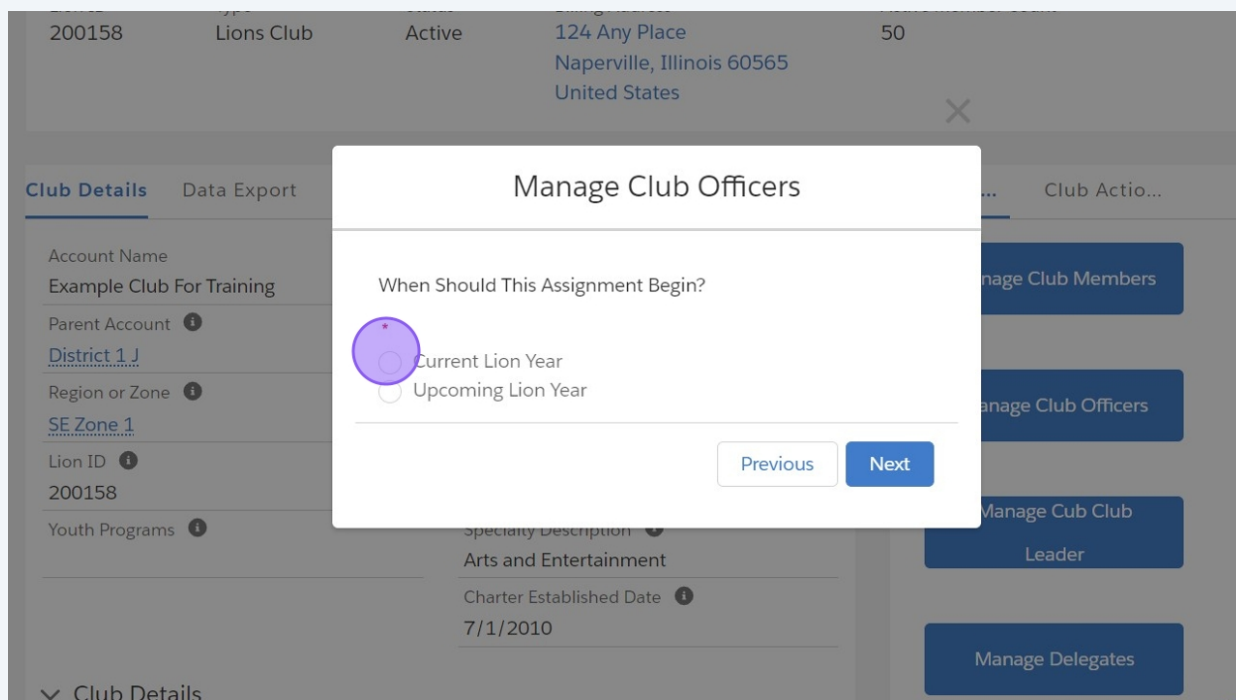


5 Click "Next"



6

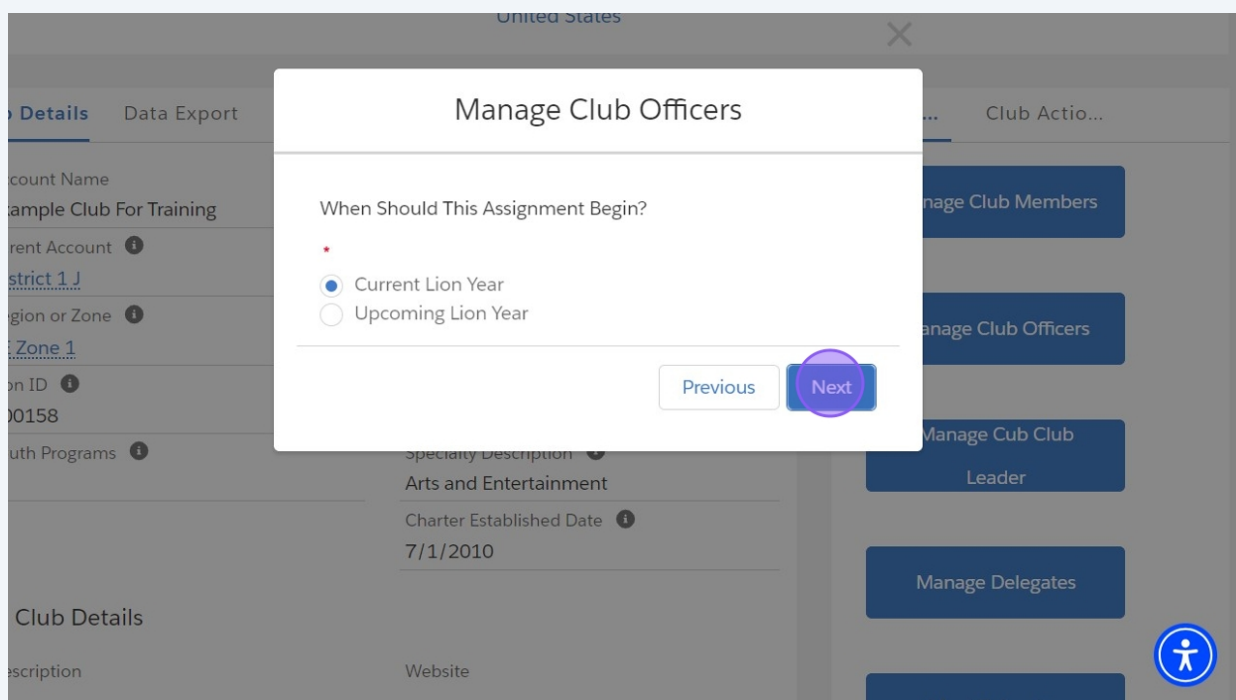
Click "Current Lion Year" to create an immediate assignment.
Click "Upcoming Lion Year" to enter next year assignments; effective on July 1st.



The screenshot shows a web application interface for managing 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" (which is selected and highlighted with a purple circle) and "Upcoming Lion Year". At the bottom of the dialog are "Previous" and "Next" buttons. The background shows the "Club Details" page for a club named "Example Club For Training" with ID 200158, located in Naperville, Illinois. Other visible details include the parent account "District 1 J", region "SE Zone 1", and charter established date "7/1/2010".

7

Click "Next"



This screenshot shows the same "Manage Club Officers" dialog box as in the previous step. In this step, the "Next" button at the bottom right of the dialog is highlighted with a purple circle, indicating the next action to take. The "Current Lion Year" radio button remains selected. The background interface is consistent with the previous screenshot.

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 Cub Club Leader
Manage Delegates

10 Click "Next"

The screenshot shows a web application interface with a modal dialog titled "Manage Club Officers". The dialog contains the question "What is the Officer and Title Type for this title?". Below this, there are two dropdown menus: "Officer Type" with "Officer" selected, and "Title Type" with "Official" selected. At the bottom right of the dialog, there are two buttons: "Previous" and "Next". The "Next" button is highlighted with a purple circle. The background shows a blurred view of the club details page, including fields for "Account Name", "District", "Region or Zone", "Club ID", "Charter Established Date", and "Website".

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 is open, displaying a list of available titles. The dropdown menu is titled "Active Members" and shows "50 of 50 items • 0 items selected". Below this, there is a search bar labeled "Search this list". The list of titles includes: "--None--", "Club Director", "Club First Vice President", "Club LCIF Coordinator", "Club Marketing Chairperson", "Club Membership Chairperson", "Club President", and "Club Second Vice President". The "--None--" option is currently selected and highlighted in blue. The background shows the same club details page as in the previous screenshot.

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
☐ Example Member Eight	26691558
☐ Example Member Eighteen	26691568
☐ Example Member Eleven	26691561
☐ 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.

* Officer Title
Club President

Active Members
4 of 4 items • 0 items selected

Q one

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

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

4 of 4 items • 1 item selected

Q one

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

Previous Next

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. Inside the dialog, the question "Would you like to add an officer address?" is displayed. Below the question, there are two radio buttons: "Yes" and "No". The "Yes" radio button is selected, indicated by a purple circle. 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", "District 1 J", "Region or Zone", "Lion ID", "Youth Programs", "Specialty Description", "Charter Established Date", and "Website".

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. The blue "Next" button at the bottom right of the dialog is now highlighted with a purple circle, indicating it should be clicked. The background interface remains the same, showing the 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 menu]
Zip/Postal Code: 60546

Club Details
Description Website

Club Actions
Manage Club Members
Manage Club Officers
Manage Club Club Leader
Manage Delegates

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 menu]
Zip/Postal Code: 60546

Previous Save

Club Details
Description Website

Club Actions
Manage Club Members
Manage Club Officers
Manage Club Club Leader
Manage Delegates



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.

Success! Note: portal user permissions may take ~ 24 hours to fully activate

Manage Club Officers

Would you like to create another Officer Title Assignment?

☐ Yes

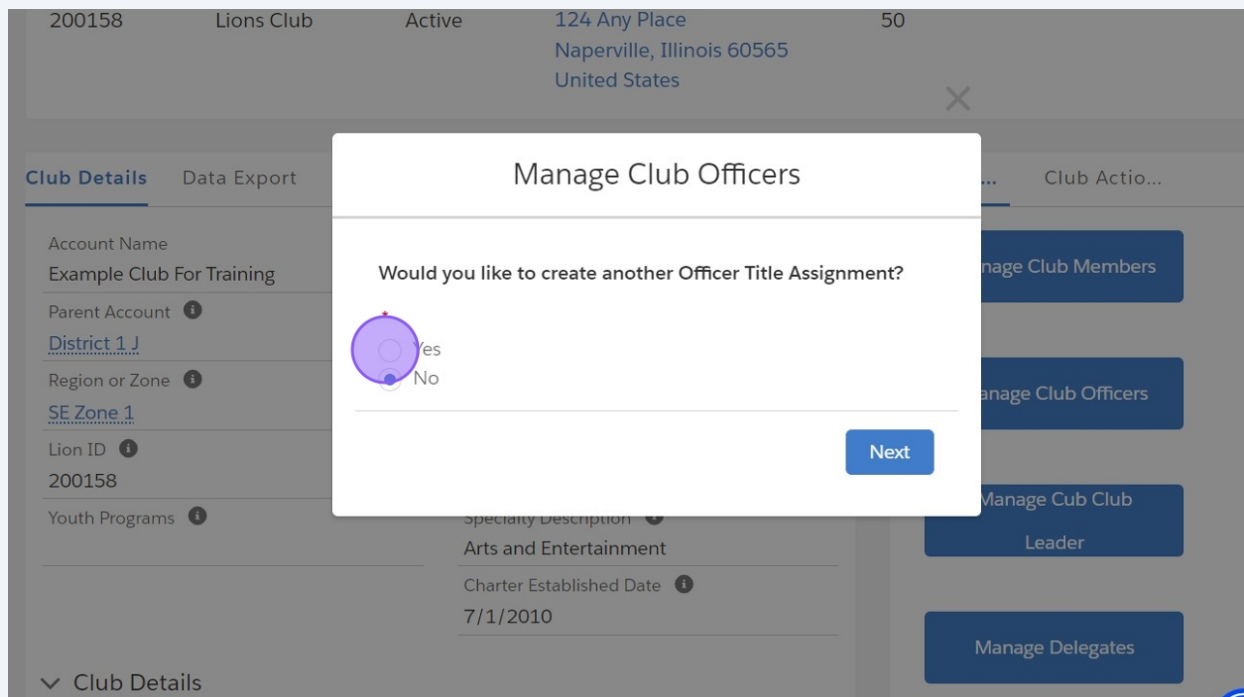
☒ No

Next



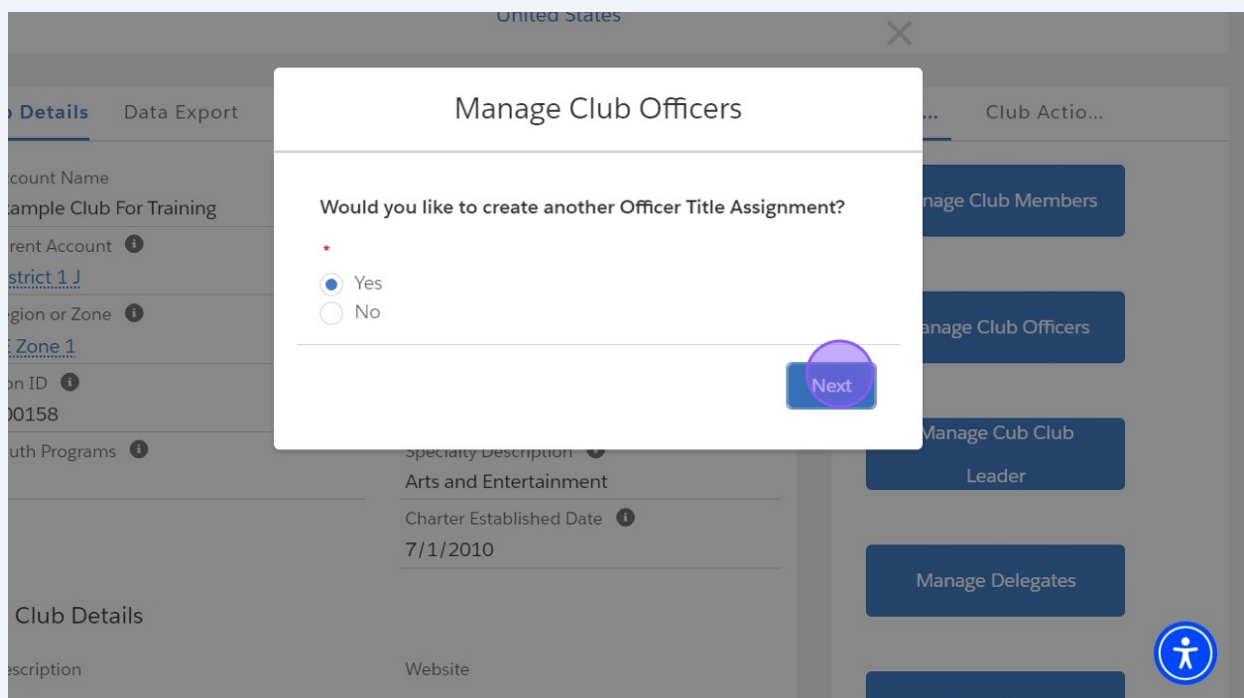
Tip! The following steps repeat the process to add another "Official" title. This example is the Club Administrator. Skip to step 32 for completing officer assignments.

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



The screenshot shows a web application interface for managing a Lions Club. A modal dialog titled "Manage Club Officers" is centered on the screen. The dialog asks, "Would you like to create another Officer Title Assignment?". Below the text, there are two radio buttons: "Yes" (which is selected, indicated by a purple dot) and "No". A blue "Next" button is located at the bottom right of the dialog. The background is a blurred view of the club's details page, showing fields like "Account Name", "Parent Account", "District 1 J", "Region or Zone", "Lion ID", "Youth Programs", "Specialty Description", "Charter Established Date", and "Website".

- 22 Click "Next"



This screenshot is similar to the previous one, showing the "Manage Club Officers" dialog box. In this step, the "Next" button is highlighted with a purple circle, indicating the action to be taken. The "Yes" radio button remains selected. The background interface is the same as in the previous screenshot, showing the club details page.

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 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 in the previous step. In this step, the "Next" button is highlighted with a purple circle, indicating the next action to be taken. 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 web application interface with a modal dialog titled "Manage Club Officers". The dialog contains the text "What is the Officer and Title Type for this title?". Below this text are two dropdown menus. The first dropdown, labeled "* Officer Type", is currently set to "--None--" and is highlighted with a purple circle. The second dropdown, labeled "* Title Type", is set to "Official". Below the dropdowns are three buttons: "Previous", "Next" (highlighted with a purple circle), and "Cancel". The background of the application shows a table with columns: "Club ID", "Type", "Status", "Billing Address", and "Active Member Count". The table contains one row with the following data: "00158", "Lions Club", "Active", "124 Any Place, Naperville, Illinois 60565, United States", and "50".

Club ID	Type	Status	Billing Address	Active Member Count
00158	Lions Club	Active	124 Any Place Naperville, Illinois 60565 United States	50

26 Click "Next"

The screenshot shows the same "Manage Club Officers" dialog box as in the previous step. In this step, the "Officer Type" dropdown is now set to "Administrator". The "Title Type" dropdown remains set to "Official". The "Next" button is highlighted with a purple circle, indicating it should be clicked. The background of the application shows the same table as in the previous step.

Club ID	Type	Status	Billing Address	Active Member Count
00158	Lions Club	Active	124 Any Place Naperville, Illinois 60565 United States	50

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

00158 Lions Club

Details Data Export

Account Name
Sample Club For Training

Parent Account ⓘ

District 1 J

Region or Zone ⓘ

Zone 1

Phone ID ⓘ

00158

Youth Programs ⓘ

Club Details

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
☐ Example Member Eight	26691558
☐ Example Member Eighteen	26691568
☐ Example Member Eleven	26691561
☐ Example Member	

Manage Club Members

Manage Club Officers

Manage Club Club Leader

Manage Delegates

28 Click "Next"

Details Data Export

Account Name
Sample Club For Training

Parent Account ⓘ

District 1 J

Region or Zone ⓘ

Zone 1

Phone ID ⓘ

00158

Youth Programs ⓘ

Club Details

Description Website

Full Name	Member ID
☐ Example Member Forty-Four	26691594
☒ Example Member Four	26691554
☐ Example Member Fourteen	26691564
☐ Example Member Thirty-Four	26691584
☐ Example Member Twenty-Four	26691574

Previous Next

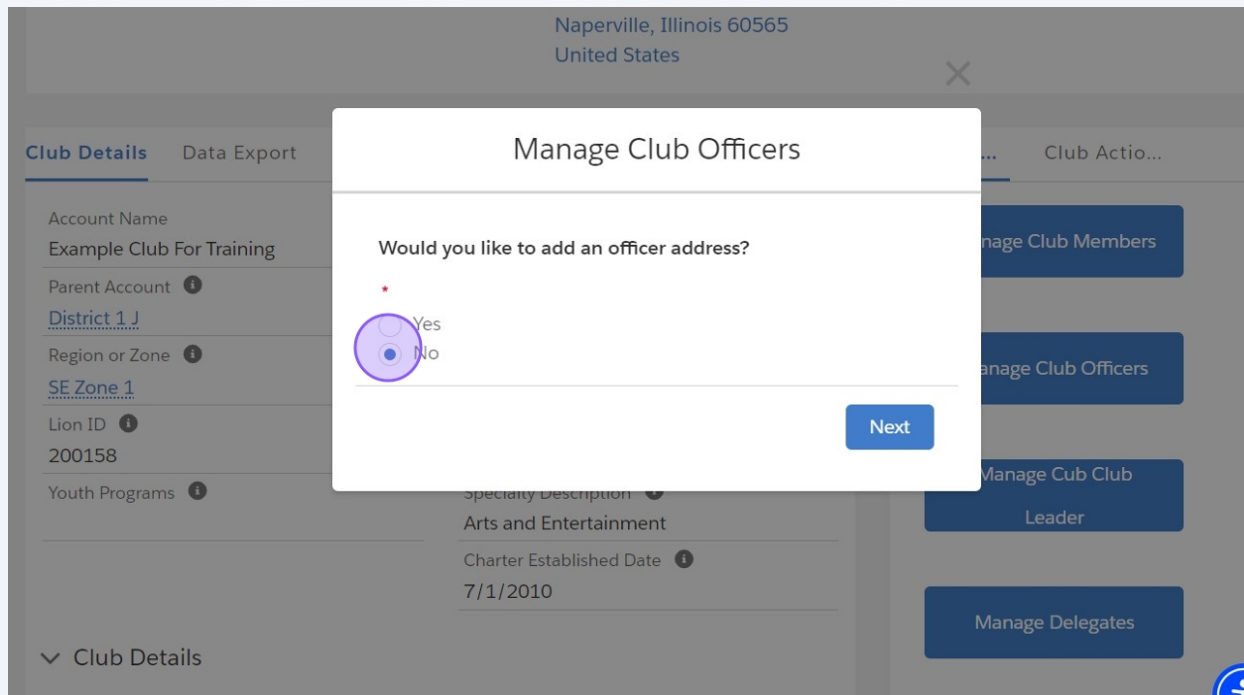
Manage Club Members

Manage Club Officers

Manage Club Club Leader

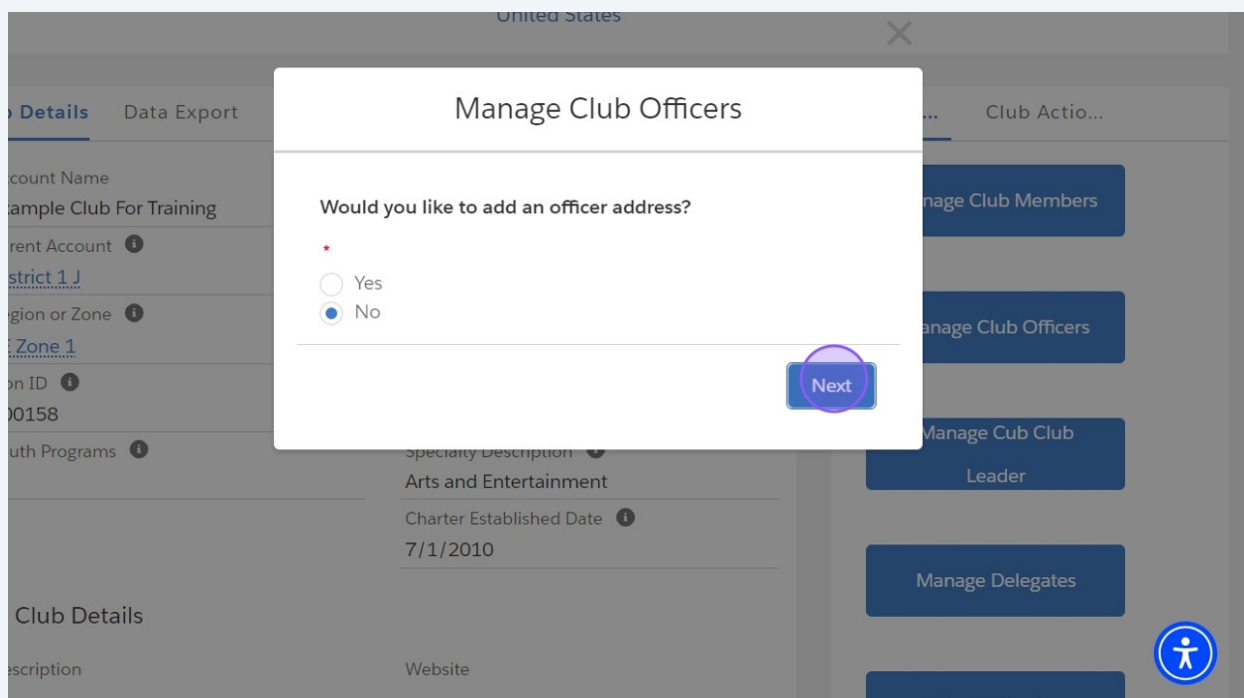
Manage Delegates

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 contains the question "Would you like to add an officer address?" and two radio buttons: "Yes" and "No". The "No" radio button is selected, indicated by a blue dot. A "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 for Parent Account (District 1 J), Region or Zone (SE Zone 1), Lion ID (200158), and Youth Programs. The location is set to Naperville, Illinois 60565, United States.

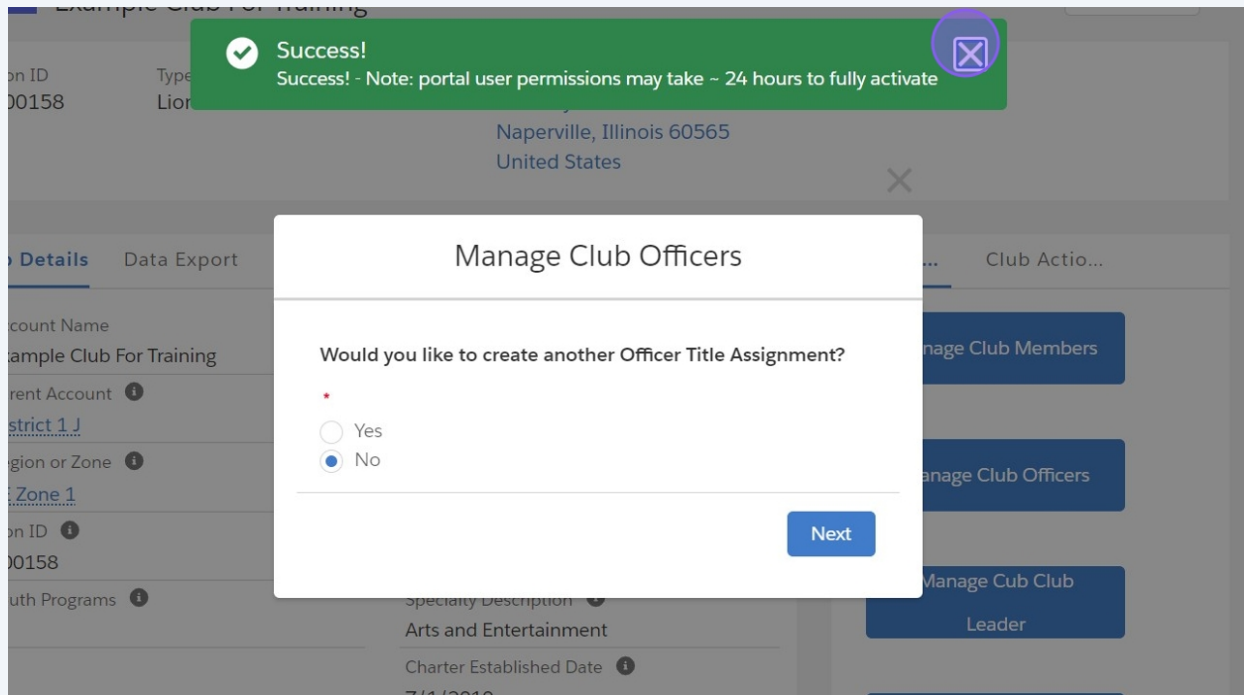
30 Click "Next"



This screenshot is identical to the previous one, showing the "Manage Club Officers" dialog box with the "No" radio button selected. In this step, the "Next" button at the bottom right of the dialog is highlighted with a blue circle, indicating it should be clicked to proceed.

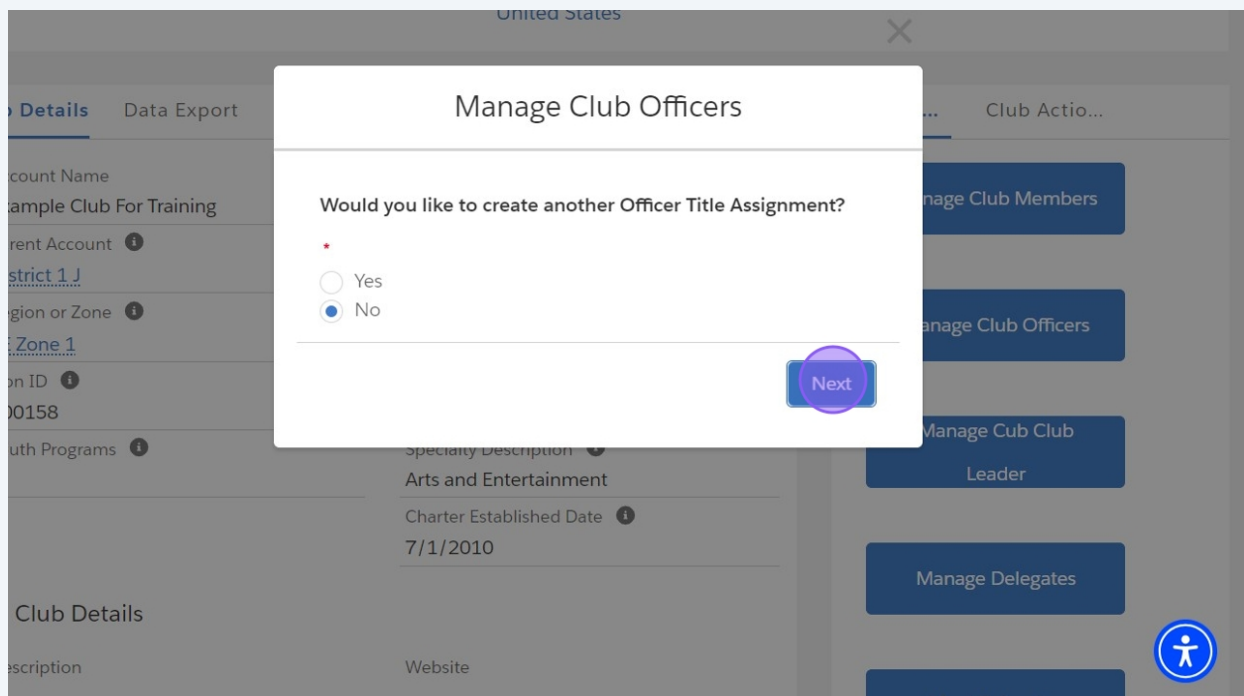
31

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
Club ID ⓘ 00158	Club Sub-Specialty ⓘ
Club Programs ⓘ	Specialty Description ⓘ Arts and Entertainment
	Charter Established Date ⓘ 7/1/2010
Club Details	
Description	Website
Address	
Billing Address 24 Any Place Springville, Illinois 60565 United States	
Shipping Address 24 Any Place	

Manage Club Officers

Manage Club Club Leader

Manage Delegates

View Delegates

View Club Officers

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

☐	Exam ple One	Club Secret ary	Sep ...	Jun ...	sben1 1@ms n.com	404 535- 676 7
☐	Exam ple One	Club Presid ent	Sep ...	Jun ...	sben1 1@ms n.com	404 535- 676 7
☐	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

☐	Exam ple One	Club Secret ary	Sep ...	Jun ...	sben1 1@ms n.com	404 535- 676 7
☐	Exam ple One	Club Presid ent	Sep ...	Jun ...	sben1 1@ms n.com	404 535- 676 7
☐	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 [Search] [Bell Icon] [User Icon]

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 Type Lions Club

Parent Account Active Member Count

Member ... Club Acti...

[Manage Club Members](#)

38

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

