Service Activities - Create, Report, Copy A Meeting Activity



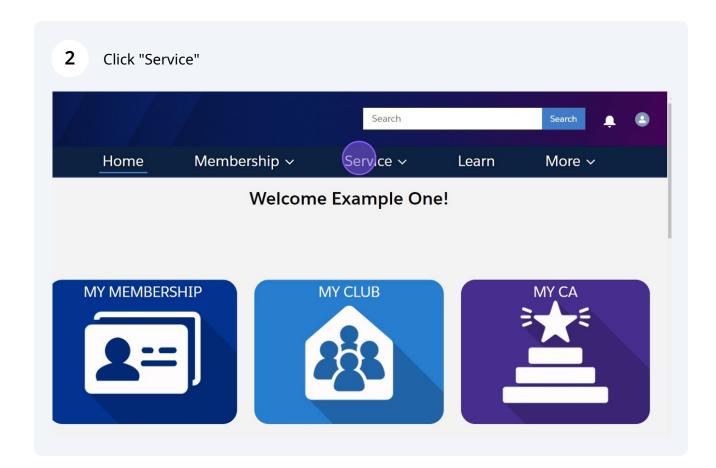
This guide is essential for anyone looking to efficiently manage activities within the Lion Portal. It provides step-by-step instructions on creating, reporting, and copying service activities, specifically focusing on meetings, which now have their own reporting metrics. By following this guide, users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

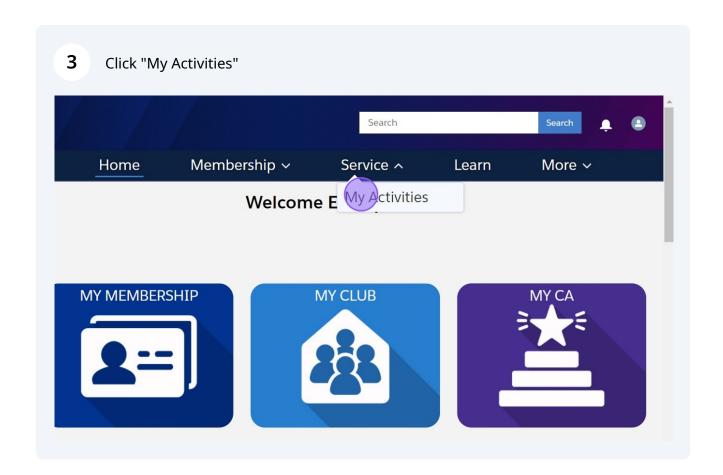
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Tip! Meeting activities now have their own classification for reporting. Metrics for these type of activities are grouped under "Meetings".

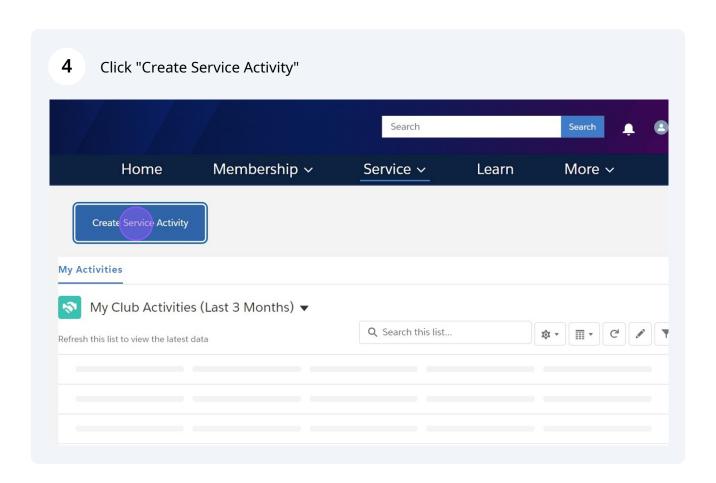
This Quick Guide covers creating, reporting, copying and then reporting the new activity for the Meeting Activity type.

1 Sign in to the Lion Portal. <u>lionportal.org</u>



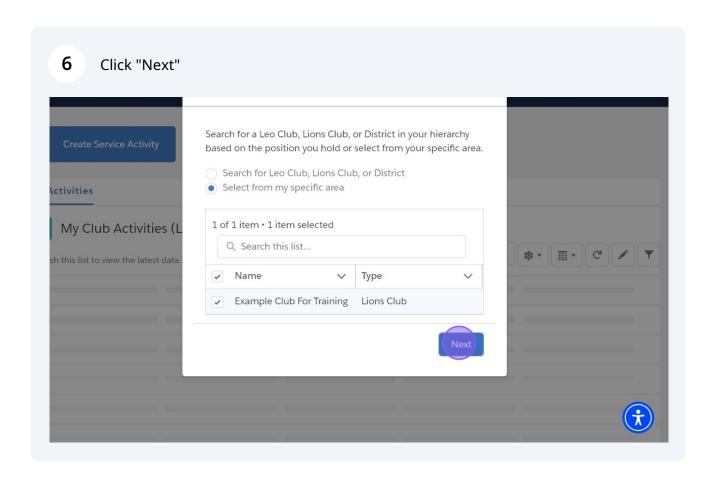


Create a Service Activity

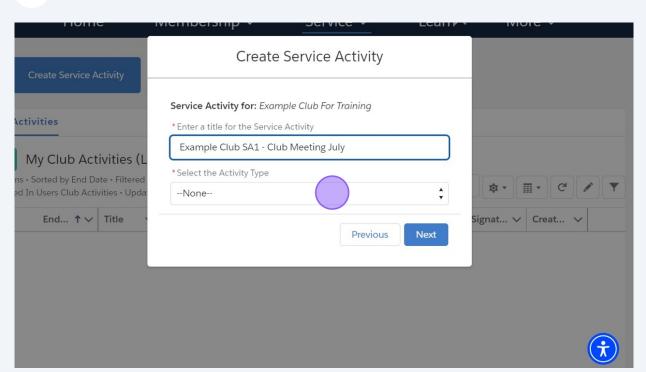


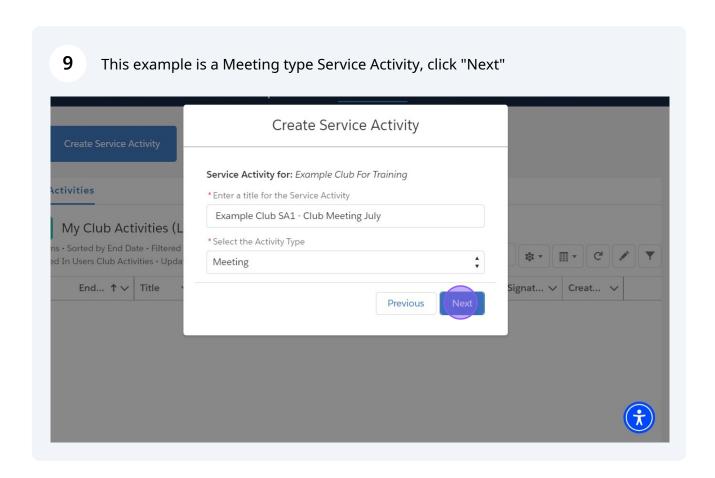
Tip! Options are shown to navigate to addition Leo, Lion, or districts you may also have permissions to manage their Service Activities.

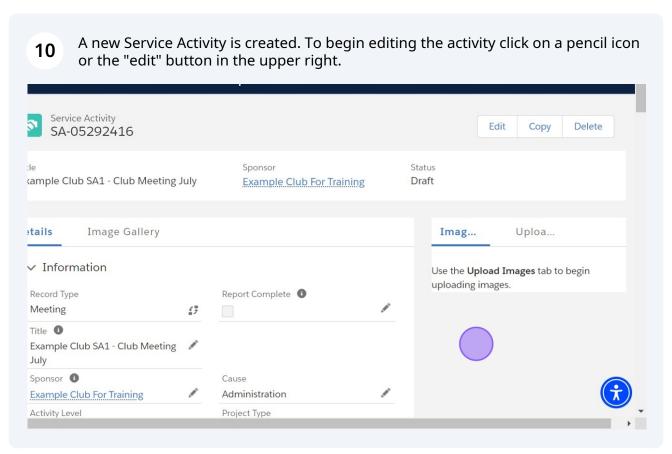
To create a Service Activity for your club, click the radio button next to your club 5 name. Search for a Leo Club, Lions Club, or District in your hierarchy based on the position you hold or select from your specific area. Search for Leo Club, Lions Club, or District Select from my specific area My Activities 1 of 1 item • 0 items selected My Club Activities (L Q Search this list... \$ - ■ - C / Name Туре Example Club For Training Lions Club Next

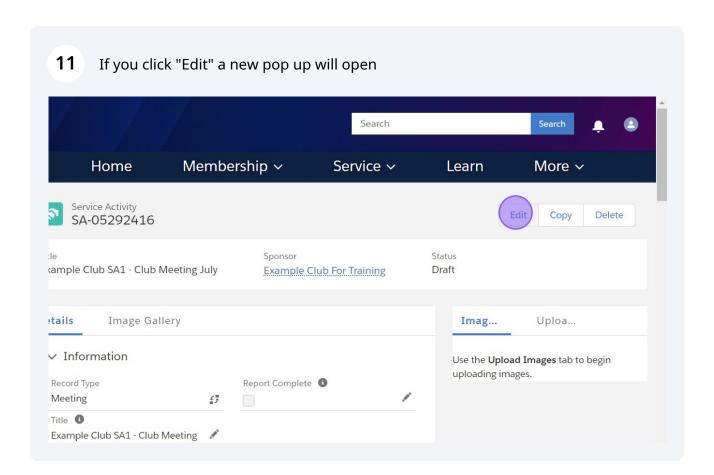


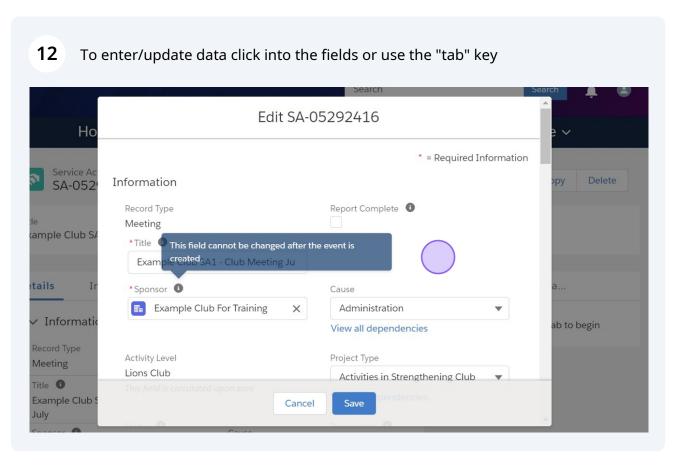
- 7 Enter a Title for the Service Activity
- Tip! Each type of Service Activity has different required data fields. The Service Activity types are:
 - Service Project
 - Fundraiser
 - Donation
 - Meeting
- 8 Click this dropdown. Select the type of Service Activity

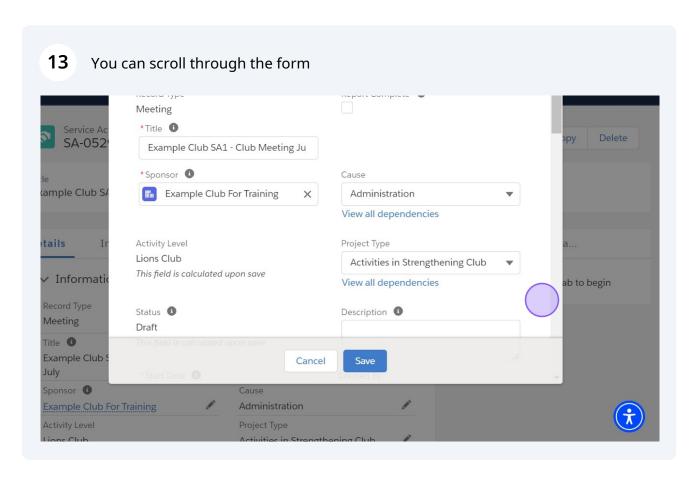


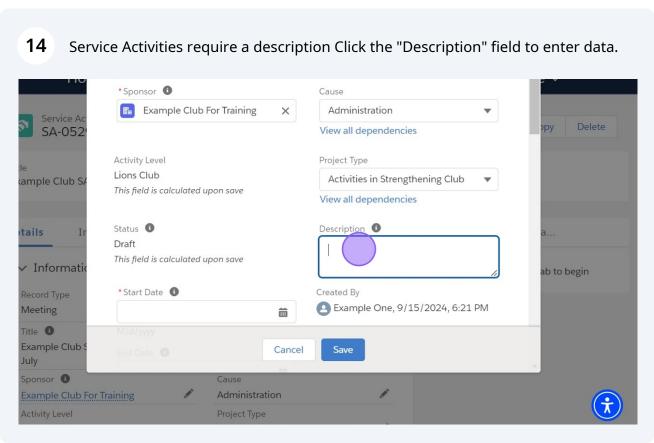




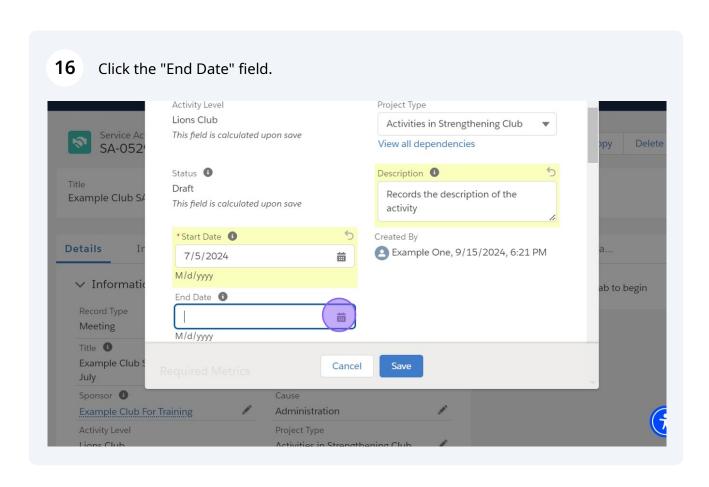




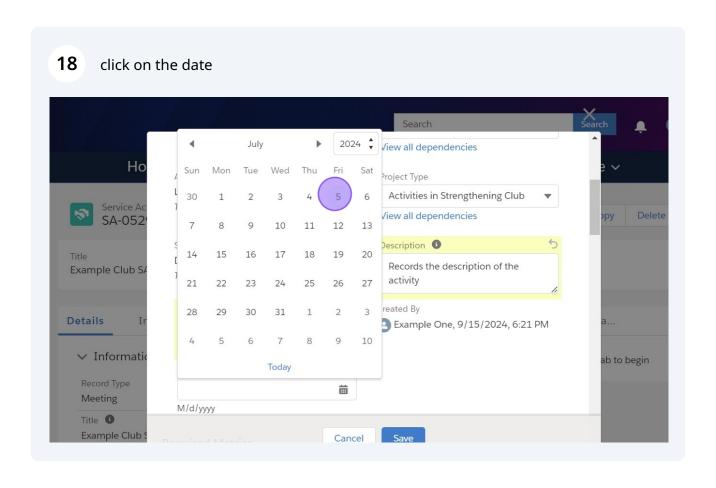




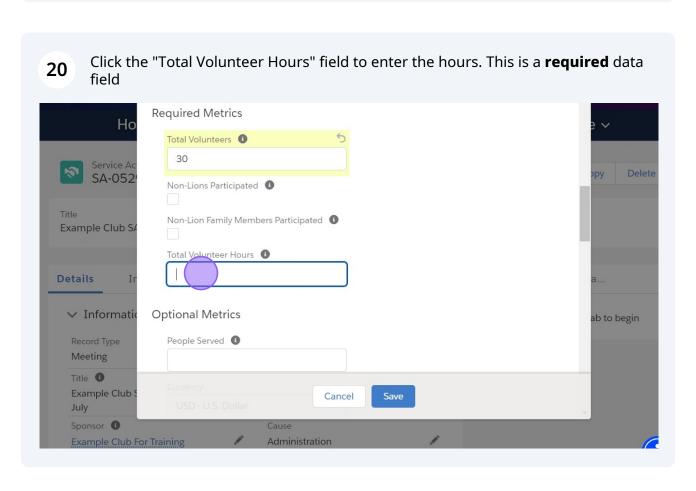
15 Click the "*Start Date" field. Type in the date using the MM/DD/YYYY format Activity Level Project Type Lions Club Activities in Strengthening Club This field is calculated upon save View all dependencies Delete SA-052 Status 1 Description 1 Draft Records the description of the Example Club SA This field is calculated upon save activity * Start Date 🕦 Created By **Details** Example One, 9/15/2024, 6:21 PM 繭 M/d/yyyy ✓ Information ab to begin End Date 1 Record Type 苗 Meeting M/d/yyyy Title 6 Example Club Cancel July Sponsor 1 Administration **Example Club For Training**



17 Click the calendar icon to select a date from a calendar 2024 View all dependencies September Ho Sun Mon Thu Fri Tue Wed Sat Project Type Activities in Strengthening Club 7 1 2 4 5 6 3 View all dependencies Delete SA-052 10 12 13 14 11 Description 🕕 15 16 17 18 19 20 21 Records the description of the Example Club SA activity 22 23 24 26 28 25 27 reated By 29 30 1 2 3 4 Details 🖣 Example One, 9/15/2024, 6:21 PM 8 9 10 11 12 ✓ Information ab to begin Today Record Type 苗 Meeting M/d/yyyy Title 0 Example Club 9 Cancel



19 Click the "Total Volunteers" field to enter the data Search End Date 🕕 Ho 7/5/2024 苗 M/d/yyyy SA-052 Required Metrics Total Volunteers 🕦 Example Club SA Non-Lions Participated 1 Details Non-Lion Family Members Participated 1 ∨ Information ab to begin Total Volunteer Hours 1 Record Type Meeting Title **6** Example Club S Cancel



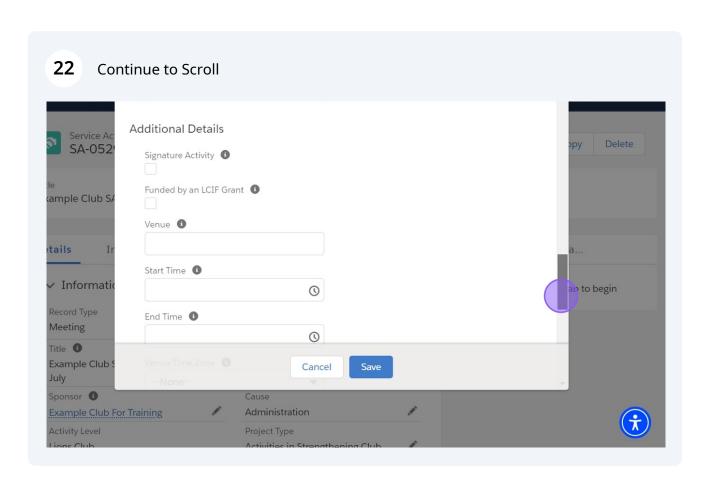


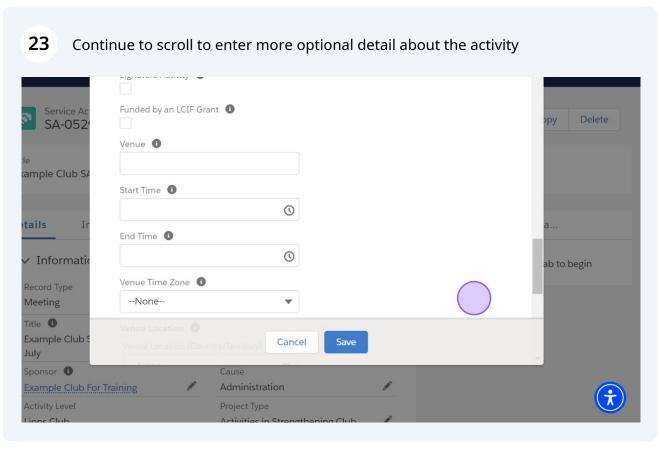
Tip!

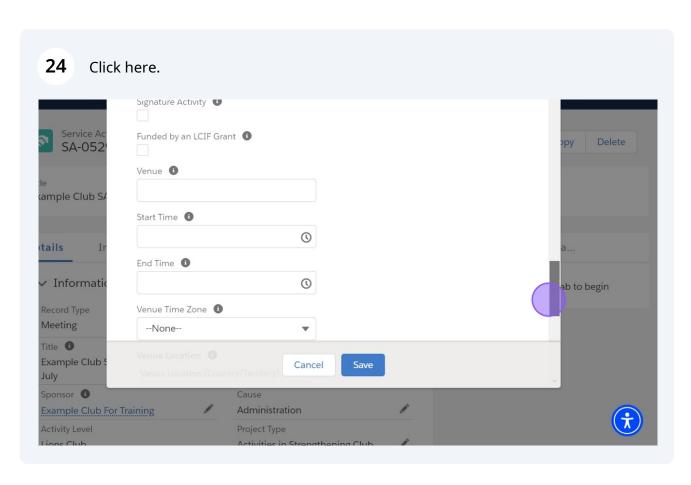
Total Funds Donated is required for a "Donation" Service Activity type Total Funds Raised is required for a "Fundraiser" Service Activity type

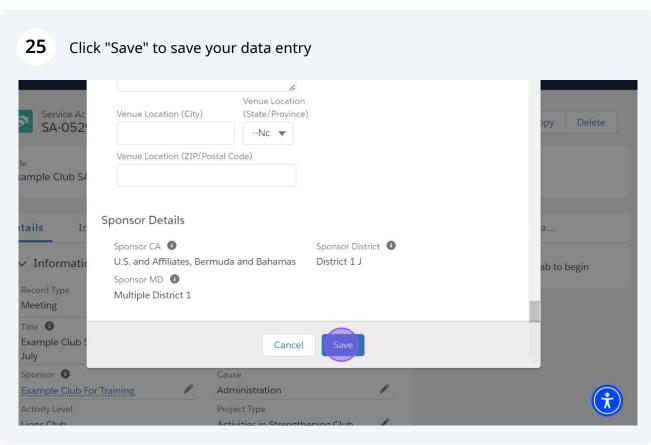
Funds can be entered in local currency by selecting "Currency" and changing the currency type.

21 Scrolling further, more metrics are displayed. Service Ad Currency Delete SA-052 USD - U.S. Dollar Total Funds Raised 🕦 Total Funds Raised (USD) 🚯 ample Club SA Total Funds Donated 🕕 Total Funds Donated (USD) 1 tails 0.00 Organization Benefited 1 Information ab to begin Record Type Meeting Donation to LCIF 1 Example Club S Cancel Sponsor 1 **Example Club For Training** Administration Activity Level Project Type





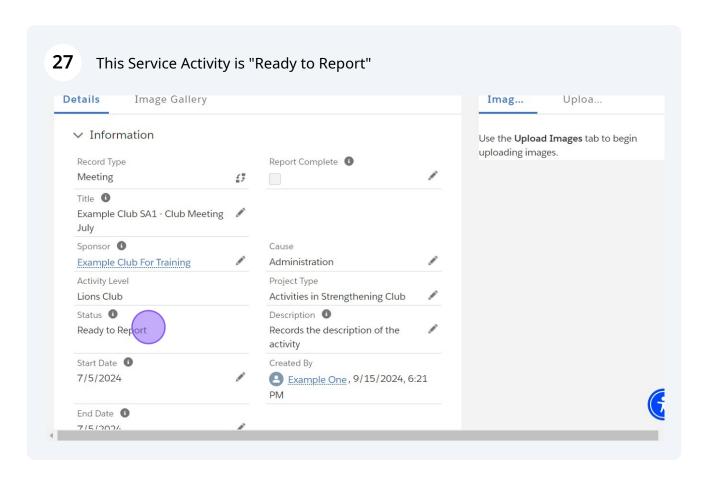


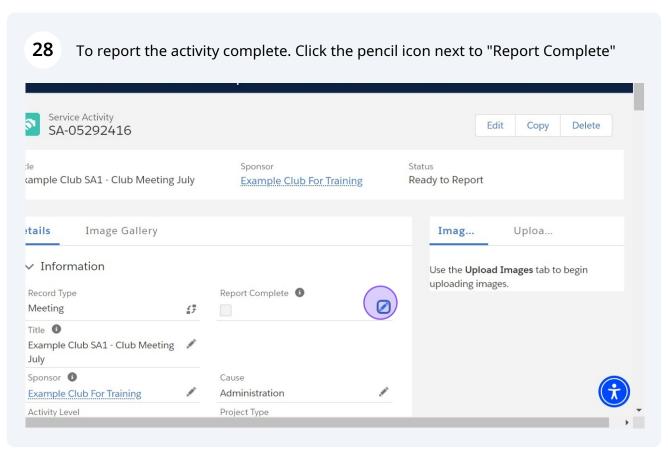


When saved a green "Success!" message will appear. Click the "X" to close the 26 message. Service Activity "a29Nq000001k5LtIAI" was saved. Membership ~ Home Service ~ Learn More ~ Service Activity Edit Сору Delete SA-05292416 Sponsor cample Club SA1 - Club Meeting July Ready to Report **Example Club For Training** tails Image Gallery Uploa... Imag... ✓ Information Use the **Upload Images** tab to begin uploading images. Report Complete 1 Record Type Meeting £ # Title 🚯 Example Club SA1 - Club Meeting

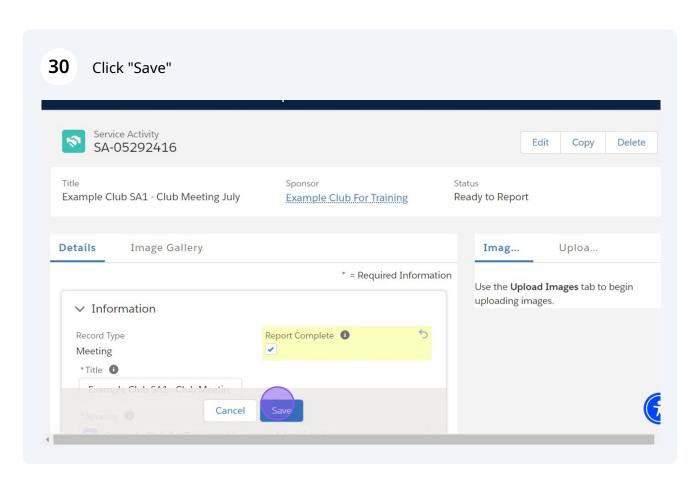


Tip! When the end date of the activity has passed, the status will be set to "Ready To Report".





29 Click the "Report Complete" field. Service Activity Сору Delete SA-05292416 Example Club SA1 - Club Meeting July Ready to Report **Example Club For Training** Details Image Gallery Imag... Uploa... * = Required Information Use the **Upload Images** tab to begin uploading images. ✓ Information Record Type ort Complete 📵 Meeting *Title 🚯 Example Club SA1 - Club Meeting Cancel



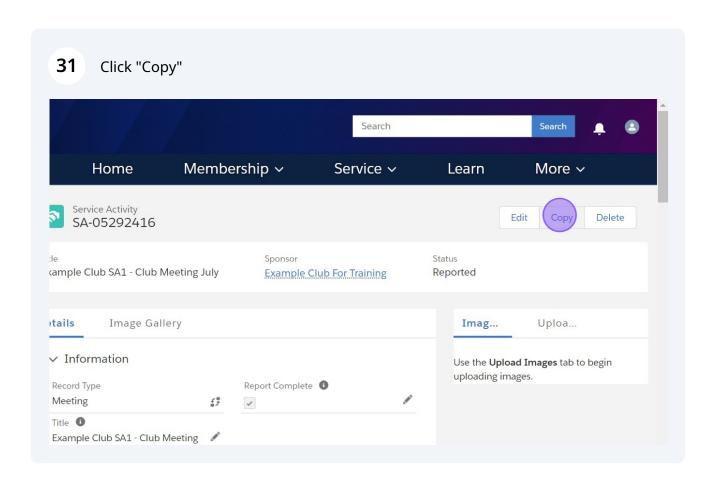


This completes Creating and Reporting a Service Activity

Copy A Service Activity

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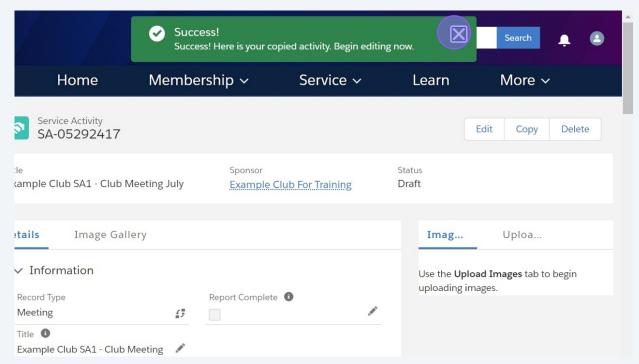
Tip! If this a a recurring activity (of any type) setting up future activities now can save time in the future!

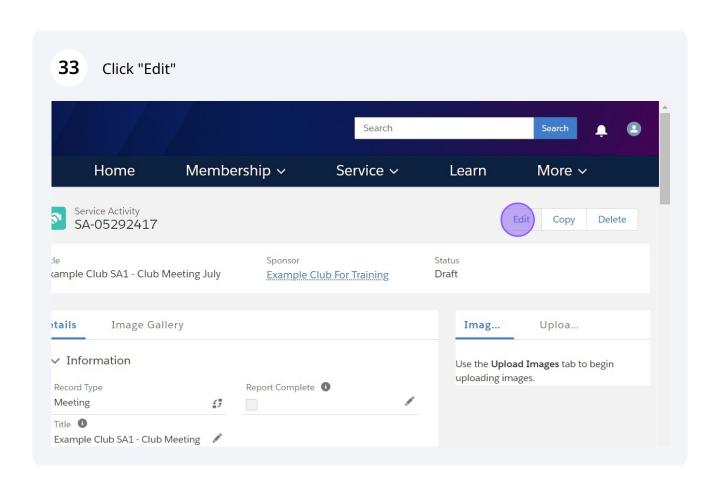


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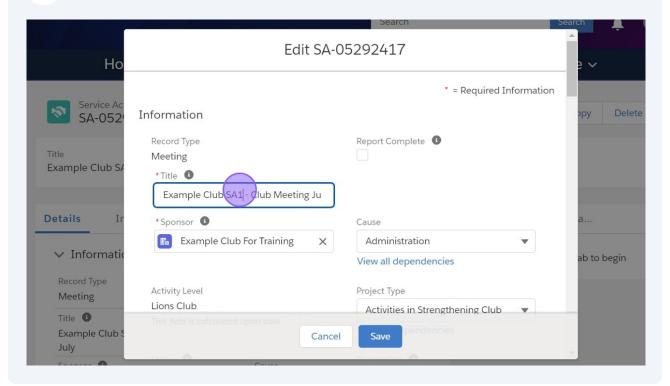
Tip! You are brought to the newly created activity from the copy button.

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





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

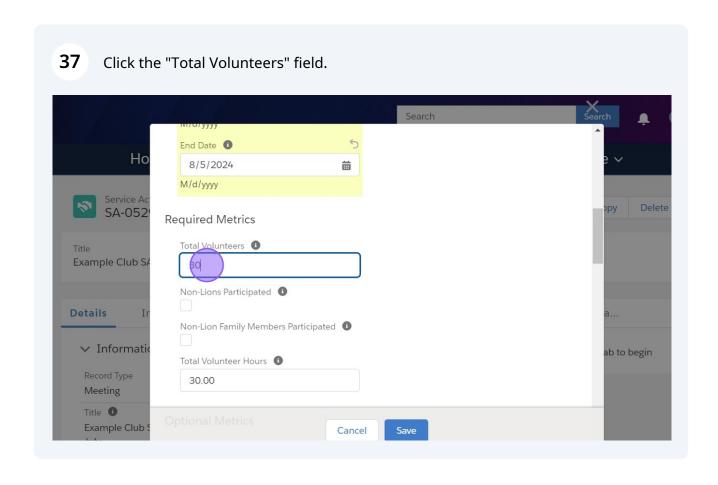


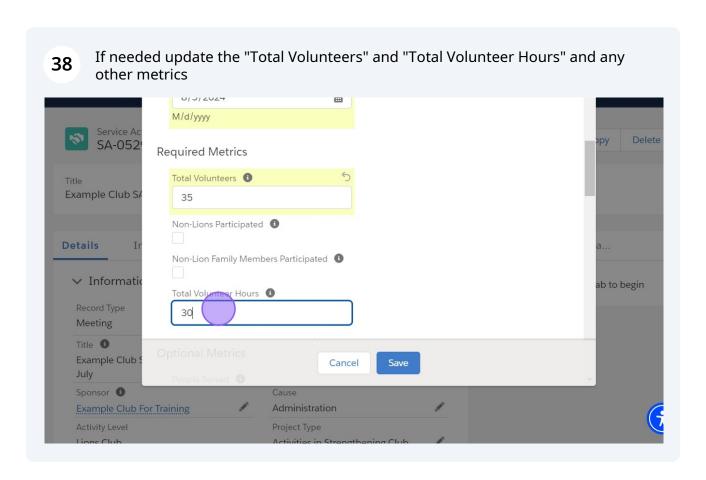
35 Type "Aug"

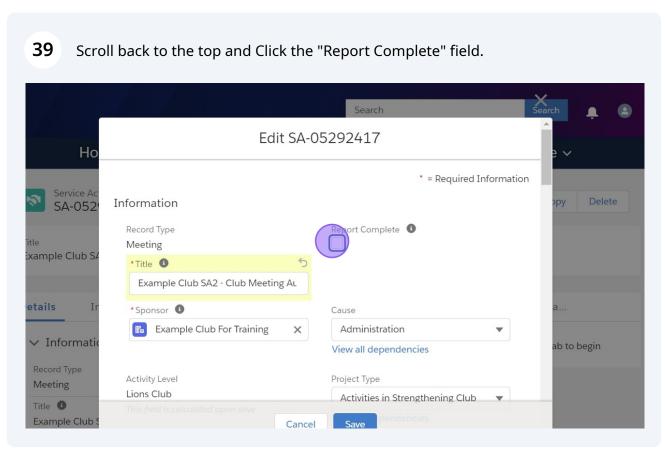


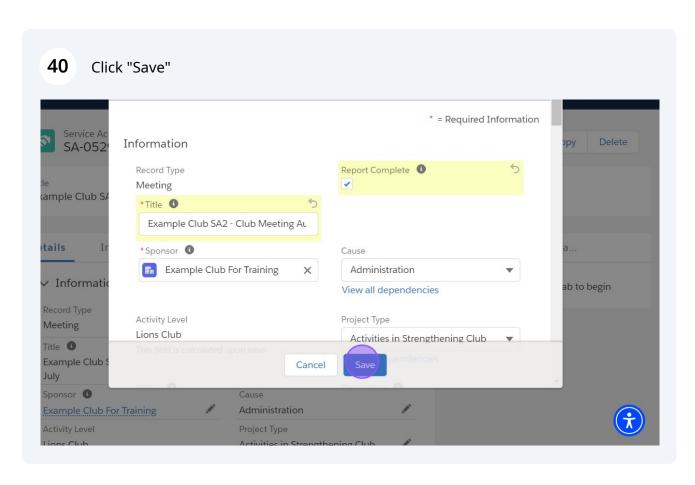
Alert! Start and End dates are not copied from the activity. These must be entered.

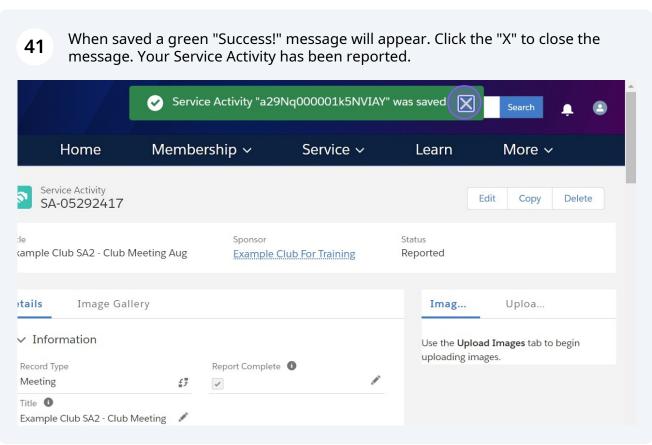
36 Click the "*Start Date" field and enter the date. Repeat for the "End Date" Search This field is calculated upon save View all dependencies Ho Status 1 Description 1 Draft Records the description of the This field is calculated upon save activity Delete SA-052 * Start Date 1 Created By Example One, 9/15/2024, 6:27 PM 繭 Example Club SA M/d/yyyy End Date 🕕 苗 Details M/d/yyyy ✓ Information ab to begin Required Metrics Record Type Total Volunteers ① Meeting Title 6 Example Club 9

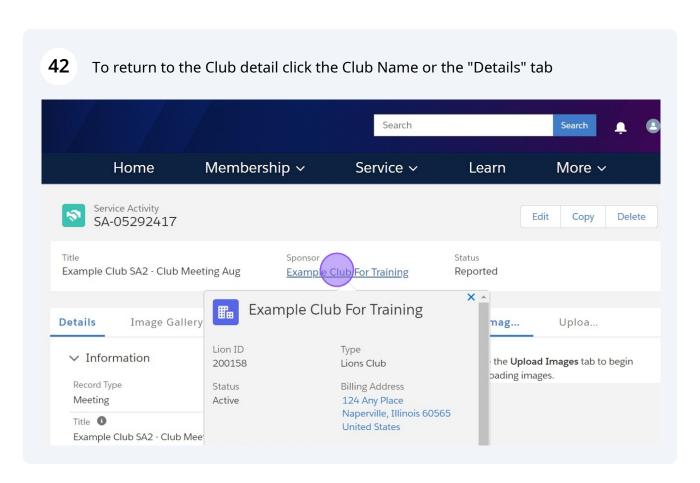


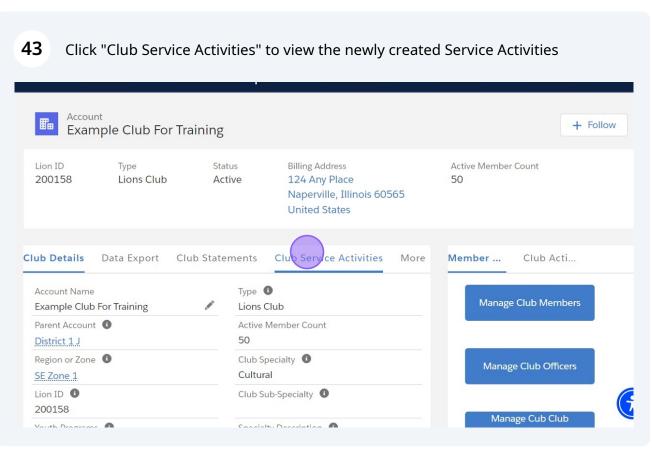


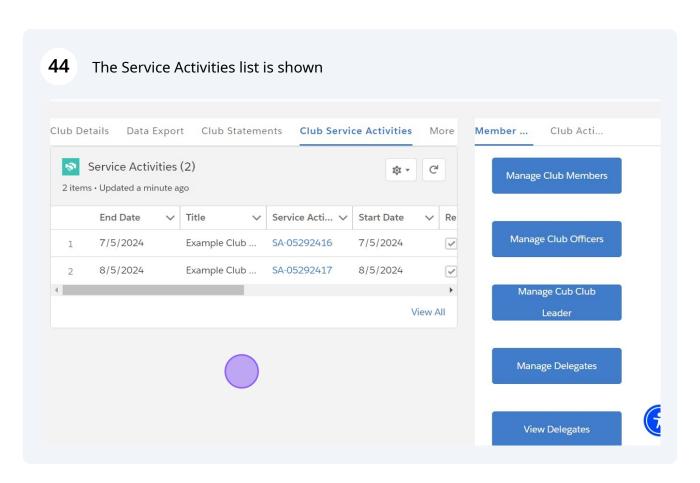


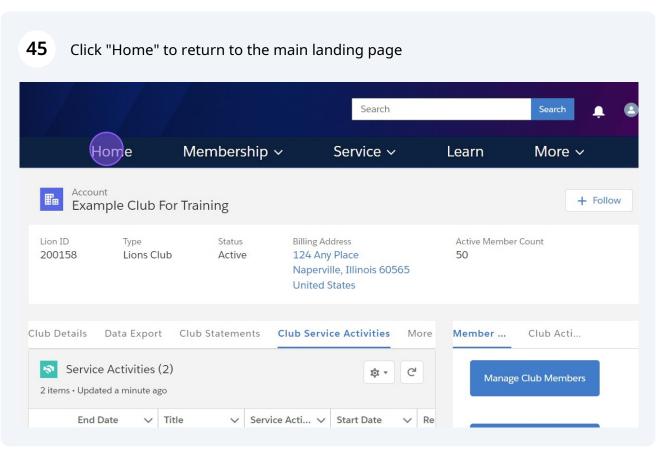












This concludes the "Service Activities - Create, Report, Copy A Meeting Activity"
Quick Guide

Welcome Example One!

MY CLUB

MY CLUB

MY CA

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