

Service Activities - Copy A Service Activity



This guide provides a straightforward method for copying a Service Activity in the Lion Portal, making it easier to replicate and manage your service initiatives. It outlines important details such as the automatic draft status and the need to update key information like dates and titles, ensuring users can efficiently customize the copied activity. By following the steps in this guide, users can streamline their service activity management while being aware of critical limitations, such as the absence of images in the copied entries. Overall, this resource is essential for anyone looking to enhance their productivity and organization in managing service activities.



Tip! This guide will show you how to copy a Service Activity.

When an activity is copied:

Note 1: the status is set to "Draft", all dates are set to blank, reported is unchecked, images from the activity are not copied. These will need to be completed to report the activity.

Note 2: Data in the metrics, and other reporting data points are copied. These can be accepted or changed for the new activity.

Note 3: Images are not copied to the new activity.

1

Sign into the Lion Portal lionportal.org

Locate The Activity To Copy



Tip! There are two paths to locate the activity to copy:

- From Service > My Activities in the top navigation bar
- From My Club > Club Service Activities Tab

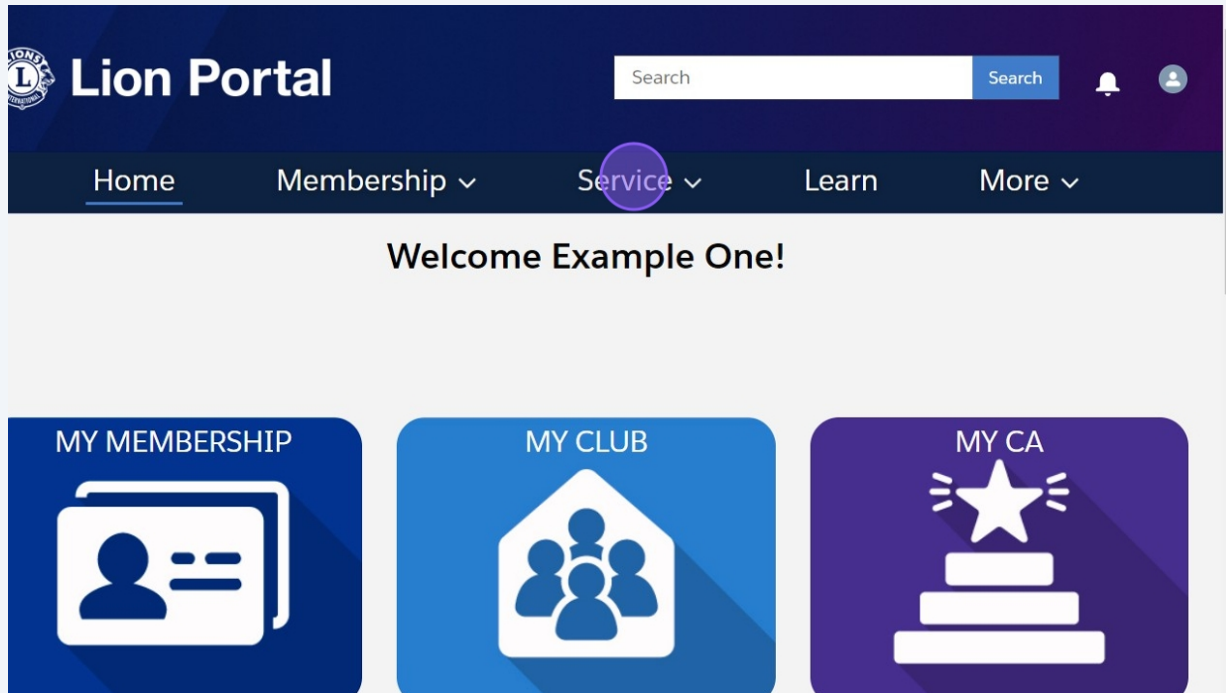
Both are shown



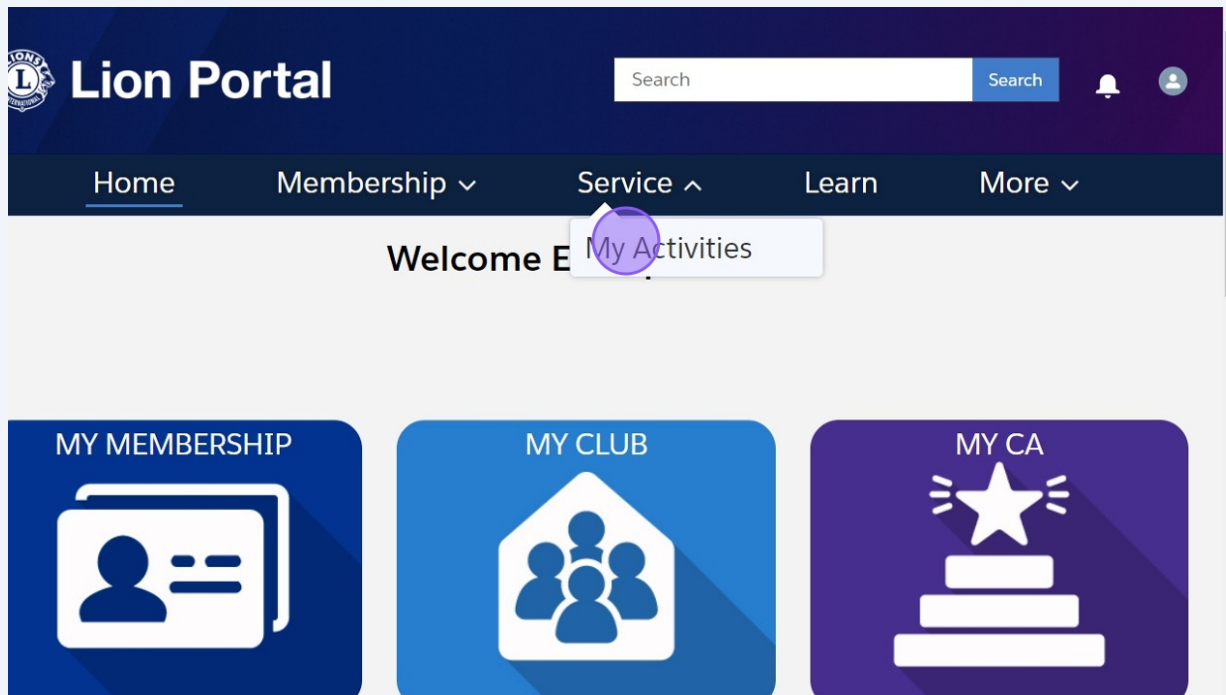
Locate from Service > My Activities

2

Click "Service"



3 Click "My Activities"



4 The list of "My Club Activities (Last 3 Months)" is the default view click the down arrow next to the view title to change to a different list view.

Create Service Activity

My Activities

 My Club Activities (Last 3 Months) ▼

8 items • Sorted by End Date • Filtered by All service activities - Start Date, Logged In Users Club Activities • Updated a few seconds ago

Search this list...

End...	↑	▼	Title	▼	Service ...	▼	Start ...	▼	R...	▼	Activ...	▼	Record ...	▼	Si...	▼	Created...	▼
1			Example Cl...		SA-052924...		9/1/2024		☐		Lions Cl...		Donation		☐			▼
2	7/4/2024		Example Cl...		SA-052924...		7/4/2024		☐		Lions Cl...		Service Pro...		☐		Example O...	▼
3	7/5/2024		Example Cl...		SA-052924...		7/5/2024		☒		Lions Cl...		Meeting		☐		Example O...	▼
4	8/5/2024		Example Cl...		SA-052924...		8/5/2024		☒		Lions Cl...		Meeting		☐		Example O...	▼
5	9/2/2024		Example Cl...		SA-052924...		9/2/2024		☒		Lions Cl...		Meeting		☐			▼
6	9/11/20...		Example Cl...		SA-052924...		9/11/20...		☒		Lions Cl...		Fundraiser		☐			▼

- 5 Click the link to the Service Activity you wish to copy.

My Activities



My Club Activities (Last 3 Months) ▼

8 items • Sorted by End Date • Filtered by All service activities - Start Date, Logged In Users Club Activities • Updated a few seconds ago

Search this list...



End... ↑ ▼	Title ▼	Service ... ▼	Start ... ▼	R... ▼	Activ... ▼	Record ... ▼	Si... ▼	Created... ▼
1	Example Club SA6...	SA-052924...	9/1/2024	☐	Lions Cl...	Donation	☐	
2	7/4/2024 Example Club SA7...	SA-052924...	7/4/2024	☐	Lions Cl...	Service Pro...	☐	Example O...
3	7/5/2024 Example Club SA1...	SA-052924...	7/5/2024	☒	Lions Cl...	Meeting	☐	Example O...
4	8/5/2024 Example Club SA2...	SA-052924...	8/5/2024	☒	Lions Cl...	Meeting	☐	Example O...
5	9/2/2024 Example Club SA2...	SA-052924...	9/2/2024	☒	Lions Cl...	Meeting	☐	
6	9/11/20... Example Club SA5...	SA-052924...	9/11/20...	☒	Lions Cl...	Fundraiser	☐	
7	9/15/20... Example Club SA3...	SA-052924...	9/15/20...	☒	Lions Cl...	Service Pro...	☒	

- 6 The activity will open, Click "Copy" to begin the process.



Lion Portal

Search

Home Membership ▼ Service ▼ Learn More ▼

 Service Activity
SA-05292423

Title
Example Club SA7 - Service Project Surfing

Sponsor
[Example Club For Training](#)

Status
Ready to Report

Details

Image Gallery

Information

Record Type
Service Project

Title ⓘ

Report Complete ⓘ

☐

Imag...

Uploa...

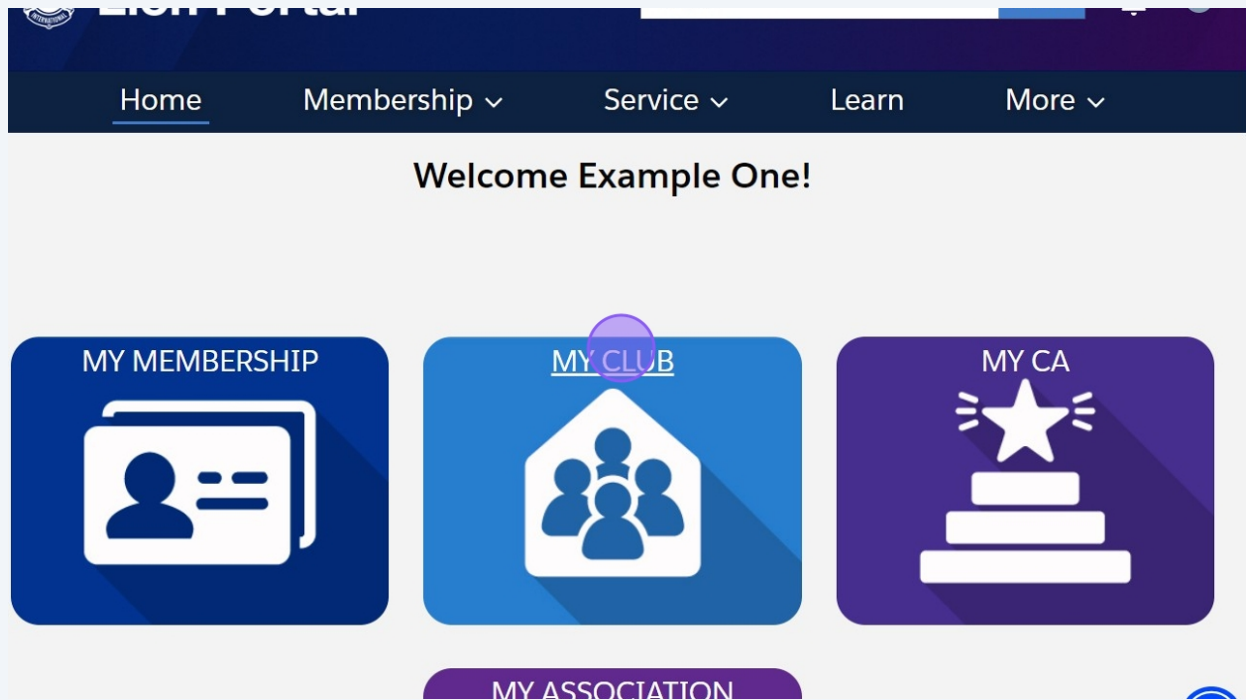




Locate from My Club > Club Service Activities Tab

7

Click "MY CLUB"



8 Click "Club Service Activities" tab

[Home](#) [Membership](#) [Service](#) [Learn](#) [More](#)

 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
56

Club Details

Data Export

Club Statements

Club Service Activities

More

Account Name
Example Club For Training

Parent Account
District 1 J

Region or Zone
SE Zone 1

Lion ID
200158

Type
Lions Club

Active Member Count
56

Club Specialty
Cultural

Club Sub-Specialty

Member ...

Club Acti...

Manage Club Members

Manage Club Officers

9 The list of Club Service Activities is shown. Click the column header to sort the list by the selected column.

Lion ID
200158

Type
Lions Club

Status
Active

Billing Address
124 Any Place
Naperville, Illinois 60565
United States

Active Member Count
56

Club Details

Data Export

Club Service Activities

More

 Service Activities (9)

9 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	☒
3	9/15/2024	Example Club ...	SA-05292418	9/15/2024	☒
4	9/17/2024	Example Club ...	SA-05292419	9/17/2024	☒
5	9/11/2024	Example Club	SA-05292420	9/11/2024	☒

Member ...

Club Acti...

Manage Club Members

Manage Club Officers

Manage Cub Club
Leader

10 Click the link to the Service Activity you wish to copy.

 Service Activities (8)

8 items · Updated a few seconds 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	☒
3	9/15/2024	Example Club ...	SA-05292418	9/15/2024	☒
4	9/17/2024	Example Club ...	SA-05292419	9/17/2024	☒
5	9/11/2024	Example Club ...	SA-05292420	9/11/2024	☒
6		Example Club ...	SA-05292421	9/1/2024	☐
7	9/2/2024	Example Club ...	SA-05292422	9/2/2024	☒
8	7/4/2024	Example Club ...	SA-05292423	7/4/2024	☐

View All

Manage Club Members

Manage Club Officers

Manage Cub Club Leader

Manage Delegates

View Delegates

View Club Officers

11 Click here.

 Lion Portal

Search



Home

Membership

Service

Learn

More

 Service Activity

SA-05292423

Edit

Copy

Delete

Title

Example Club SA7 - Service Project Surfing

Sponsor

[Example Club For Training](#)

Status

Ready to Report

Details

Image Gallery

Information

Record Type

Service Project

Title

Report Complete

☐

Image Gallery

Uploa...



- 12 The activity will open, Click "Copy" to begin the process.

Lion Portal

Search

Home Membership Service Learn More

Service Activity SA-05292423

Edit Copy Delete

Example Club SA7 - Service Project Surfing

Sponsor [Example Club For Training](#)

Status Ready to Report

Details Image Gallery

Information

Record Type Service Project

Report Complete

Title

Image Gallery

Imag... Uploa...

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

Edit the Copied Activity

- 13 A green success message will show. Click this icon to close the message. The new activity is ready to be updated with data for this new activity.

Lion Portal

Search

Home Membership Service Learn More

Service Activity SA-05292424

Edit Copy Delete

Example Club SA7 - Service Project Surfing

Sponsor [Example Club For Training](#)

Status Draft

Details Image Gallery

Information

Record Type Service Project

Report Complete

Title

Image Gallery

Imag... Uploa...

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



Alert! When a Service Activity is copied the Start and End Dates are set to blank. The activity is set to "Not Reported". These fields must be updated to report the activity complete.



Tip! We suggest you edit the **Title** of the Service Activity to make it easier to find in the future. To save the edits a "Start Date" is required.



In-line edit method example

14 To edit the Title Click the pencil icon next to "Title".

Example Club SA7 - Service Project Surfing

[Example Club For Training](#)

Draft

Details

Image Gallery

Information

Record Type

Service Project

Title

Example Club SA7 - Service Project Surfing

Sponsor

[Example Club For Training](#)

Activity Level

Lions Club

Status

Draft

Report Complete

☐

Cause

Vision

Project Type

Other

Description

We partnered with another club and a local surfing based youth club to run an in water surfing event for visually impaired. Participants were age 6 to 73.

Imag...

Uploa...

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

15 Click the into the "Title" field to edit the name.

Details Image Gallery

* = Required Information

Information

Record Type
Service Project

* Title *i*
Club SA7 - Service Project Surfin

* Sponsor *i*
Example Club For Training X

Activity Level
Lions Club
This field is calculated upon save

Report Complete *i*
☐

* Cause
Vision

Project Type
Other

View all dependencies

Cancel Save

Status *i* Description *i*

Imag... Uploa...

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

16 Click "Save"

Details Image Gallery

* = Required Information

Information

Record Type
Service Project

* Title *i*
Example Club SA8 - Service Proje

* Sponsor *i*
Example Club For Training X

Activity Level
Lions Club
This field is calculated upon save

Report Complete *i*
☐

* Cause
Vision

Project Type
Other

View all dependencies

Cancel Save

Status *i* Description *i*

Imag... Uploa...

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



Tip! If there is an error trying to save the record. Helpful messages will guide you to the points to correct the errors

17

The "Start Date" is required to save the activity. The error message will pop up to show the error(s). Click the link of the error. In this example "Start Date" is the error.

Details Image Gallery

* = Required Information

Information

Record Type
Service Project

Report Complete ☐

* Title

* Sponsor

* Cause

We hit a snag.

Review the following fields

- Start Date

Cancel Save

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Linking the error link will move you to the field causing the error. The message below will provide detail of the error. Correct the data and click "Save".

The screenshot shows a web form with a red border around the top input field. A yellow message box states: "Complete this field with format M/d/yyyy." Below this is the "End Date" field with a calendar icon. Underneath is a section titled "Required Metrics" with a dropdown arrow. It contains three input fields: "People Served" with the value "150", "Total Volunteers" with the value "95", and "Non-Lions Participated" with a checked checkbox. Below these is a partially visible "Non-Lion Family Members Participated" field. At the bottom right are "Cancel" and "Save" buttons. A user profile "Example One, 9/22/2024, 9:16 AM" is visible in the top right. A blue circular icon with a white arrow is in the bottom right corner.



End of In-line edit method example



Pop-up form method example

19 Click "Edit"

The screenshot shows the 'Service Activity' page for 'SA-05292424'. At the top, there is a navigation bar with 'Home', 'Membership', 'Service', 'Learn', and 'More'. Below the navigation bar, the activity name 'Example Club SA8 - Service Project Surfing' is displayed, along with the sponsor 'Example Club For Training' and the status 'Draft'. On the right side, there are three buttons: 'Edit' (circled in purple), 'Copy', and 'Delete'. Below the activity name, there is a section titled 'Details' with a sub-section 'Image Gallery'. The 'Image Gallery' section contains a message: 'Use the Upload Images tab to begin uploading images.' The 'Details' section also includes a table with the following information:

Record Type	Report Complete
Service Project	☐
Title	
Example Club SA8 - Service Project Surfing	
Sponsor	
Example Club For Training	
Activity Level	
Lions Club	

20 Click into the field(s) to edit and then click "Save" to save your updates.

The screenshot shows the 'Information' modal form. The form contains the following fields:

- Record Type: Service Project
- Report Complete: ☐
- * Title: Example Club SA8 - Service Project S
- * Sponsor: Example Club For Training
- * Cause: Vision
- Activity Level: Lions Club
- Project Type: Other

At the bottom of the form, there are two buttons: 'Cancel' and 'Save' (circled in purple). A note at the bottom of the form states: 'This field is calculated upon save'.



End of Pop-up form method example



Reminder: Images are not copied to the new activity.

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Note: there are no images for this new activity.

The screenshot shows a web form for a new activity. At the top, there are three fields: 'Title' with the value 'Example Club SA8 - Service Project Surfing', 'Sponsor' with the value 'Example Club For Training', and 'Status' with the value 'Draft'. Below these is a tabbed interface with 'Details' and 'Image Gallery' tabs. The 'Details' tab is active, showing a form with two columns. The left column contains 'Record Type' (Service Project), 'Title' (Example Club SA8 - Service Project Surfing), 'Sponsor' (Example Club For Training), 'Activity Level' (Lions Club), and 'Status' (Draft). The right column contains 'Report Complete' (checkbox), 'Cause' (Vision), 'Project Type' (Other), and 'Description' (We partnered with another club and a local surfing based youth). A purple circle highlights the 'Image Gallery' tab. A blue circle highlights the 'Upload Images' button. A message box says 'Use the Upload Images tab to begin uploading images.' A blue circle with a person icon is in the bottom right corner.

Example Club SA8 - Service Project Surfing		Sponsor	Status
Example Club SA8 - Service Project Surfing		Example Club For Training	Draft

Details		Image Gallery
Information		
Record Type	Report Complete	
Service Project	☐	
Title		
Example Club SA8 - Service Project Surfing		
Sponsor	Cause	
Example Club For Training	Vision	
Activity Level	Project Type	
Lions Club	Other	
Status	Description	
Draft	We partnered with another club and a local surfing based youth	

- 22 To return to the Club page click the link below "Sponsor"

Lion Portal Search [] [Search] [Bell] [User]

Home Membership ▾ Service ▾ Learn More ▾

Service Activity SA-05292424 [Edit] [Copy] [Delete]

Title: Example Club SA8 - Service Project Surfing Sponsor: Example Club For Training Status: Draft

Example Club For Training

Details Image Gallery

Information

Record Type: Service Project

Title ⓘ: Example Club SA8 - Service Project

Lion ID: 200158 Type: Lions Club

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

Upload Images tab to begin uploading images.

- 23 Click "Home" to return to the landing page.

Lion Portal Search [] [Search] [Bell] [User]

Home Membership ▾ Service ▾ Learn More ▾

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: 56

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

24 This concludes the "Service Activities - Copy A Service Activity" Quick Guide

