

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.

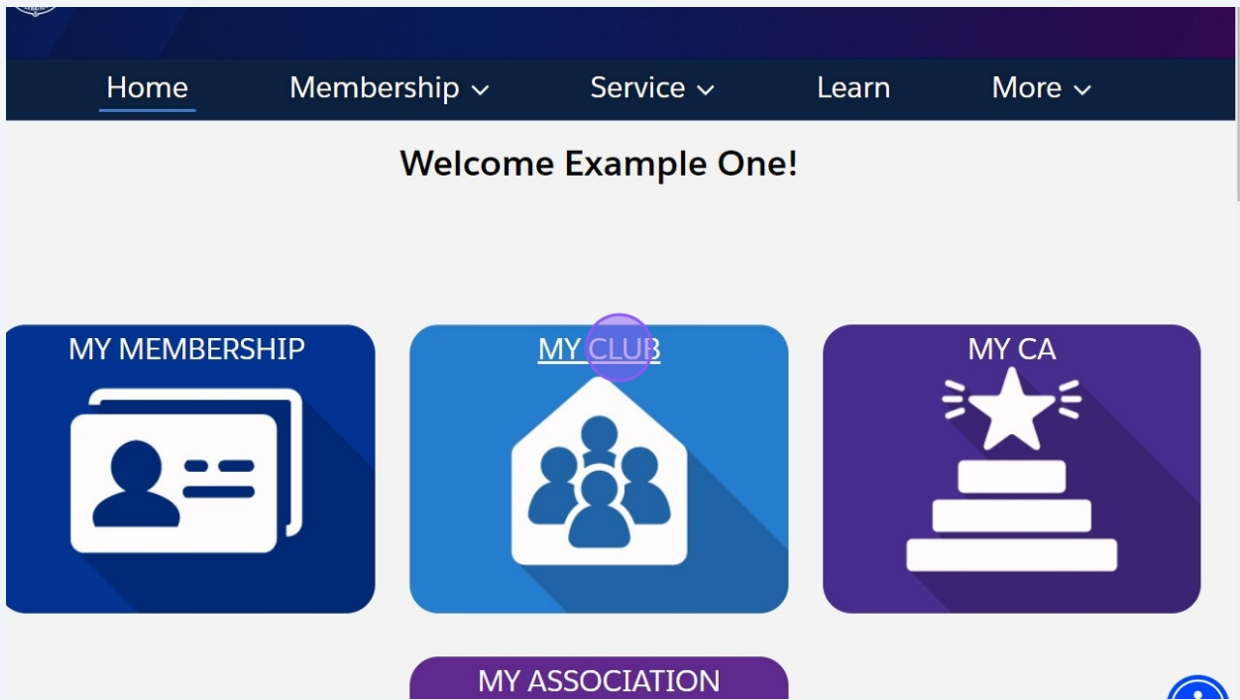
Titles that can assign officers at the individual Club level are:

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

1

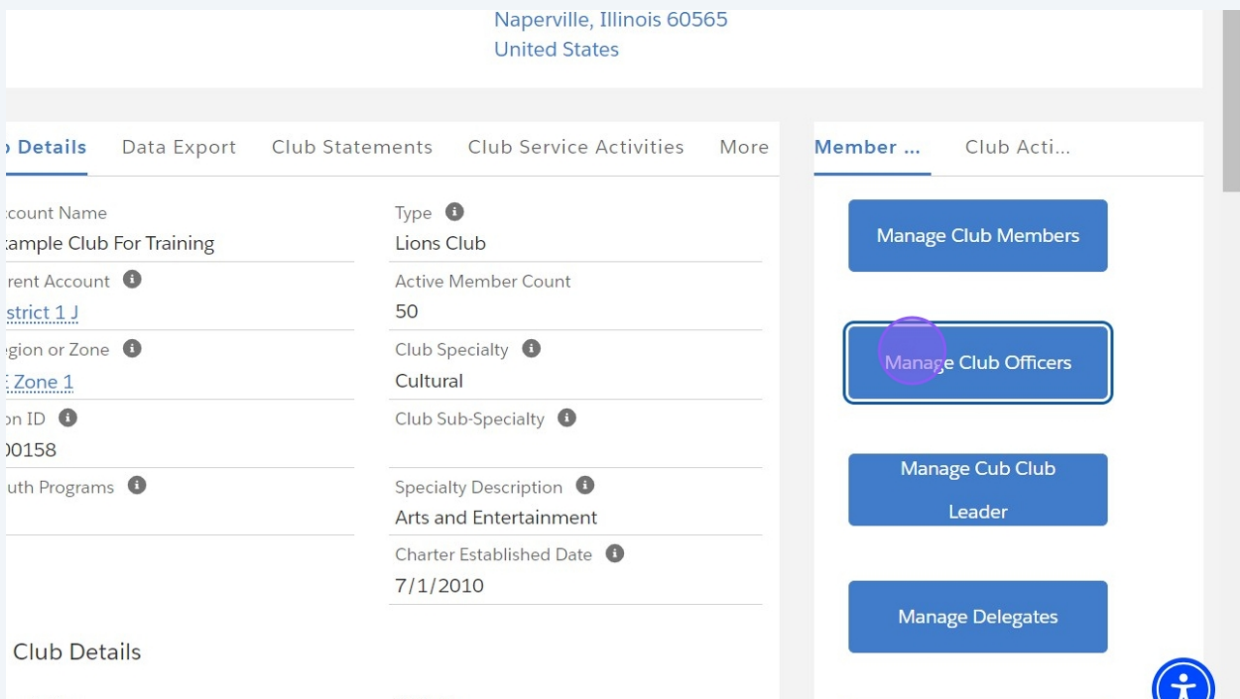
Sign in to the Lion Portal. lionportal.org

2 Click "MY CLUB"

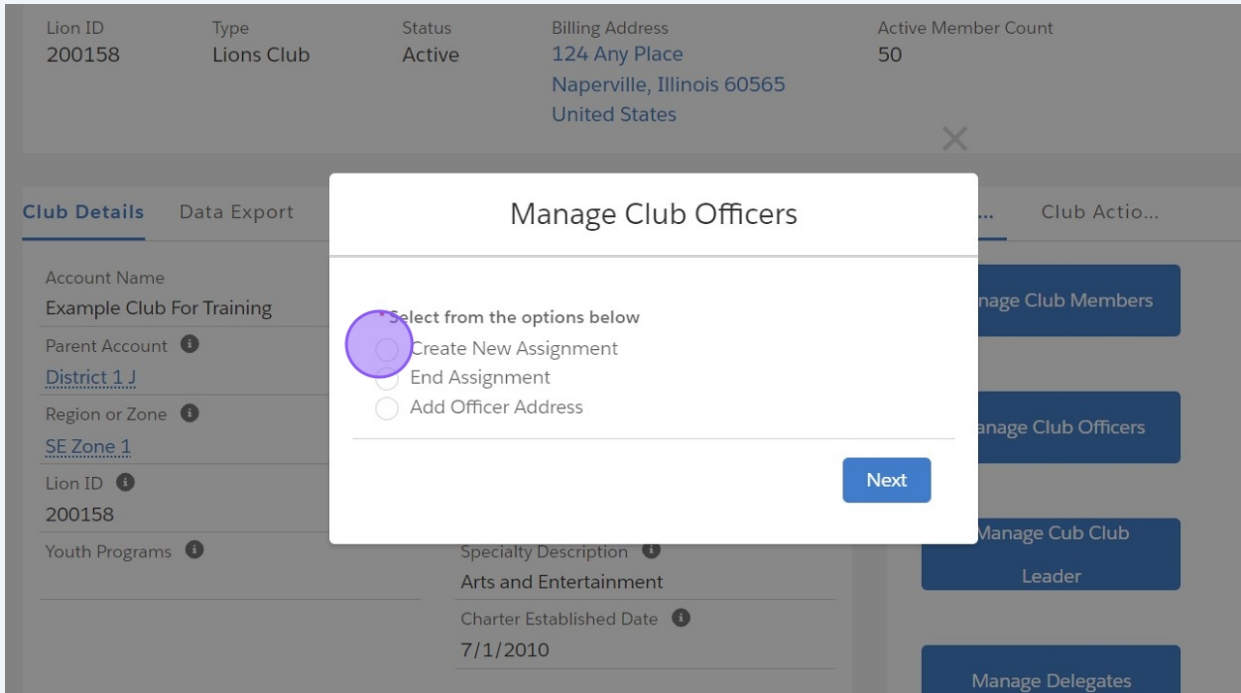


Create Officer Assignment

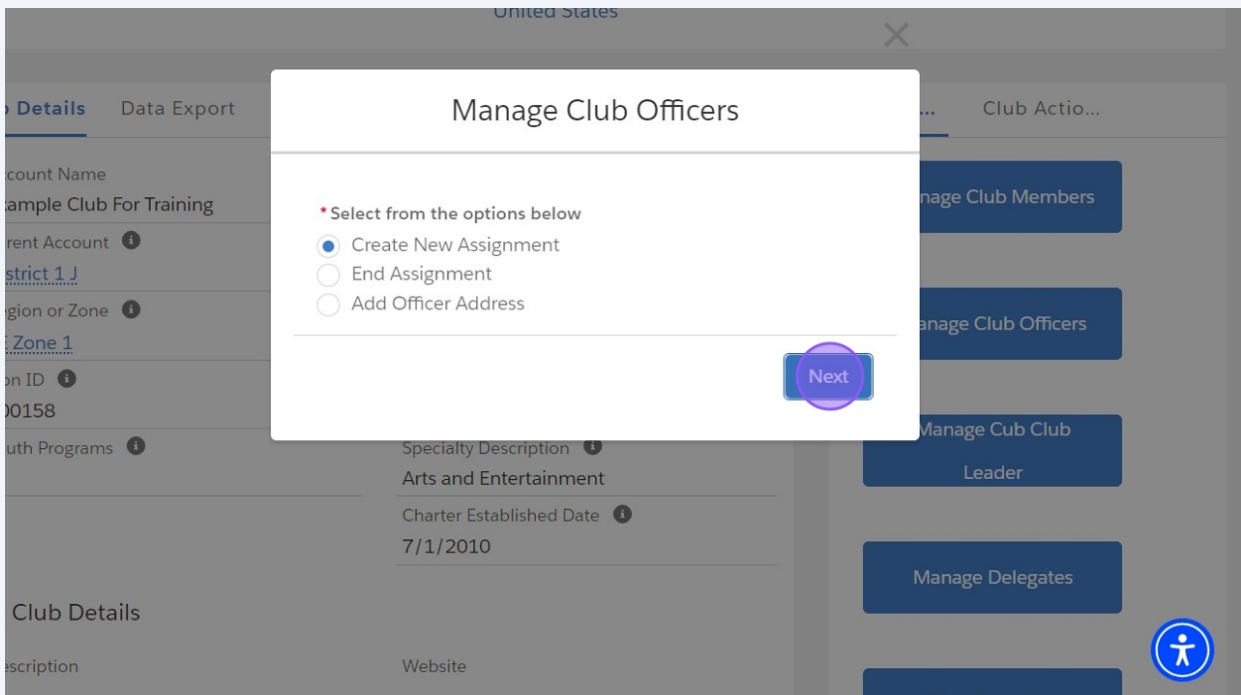
3 Click "Manage Club Officers"



4 Click "Create New Assignment"

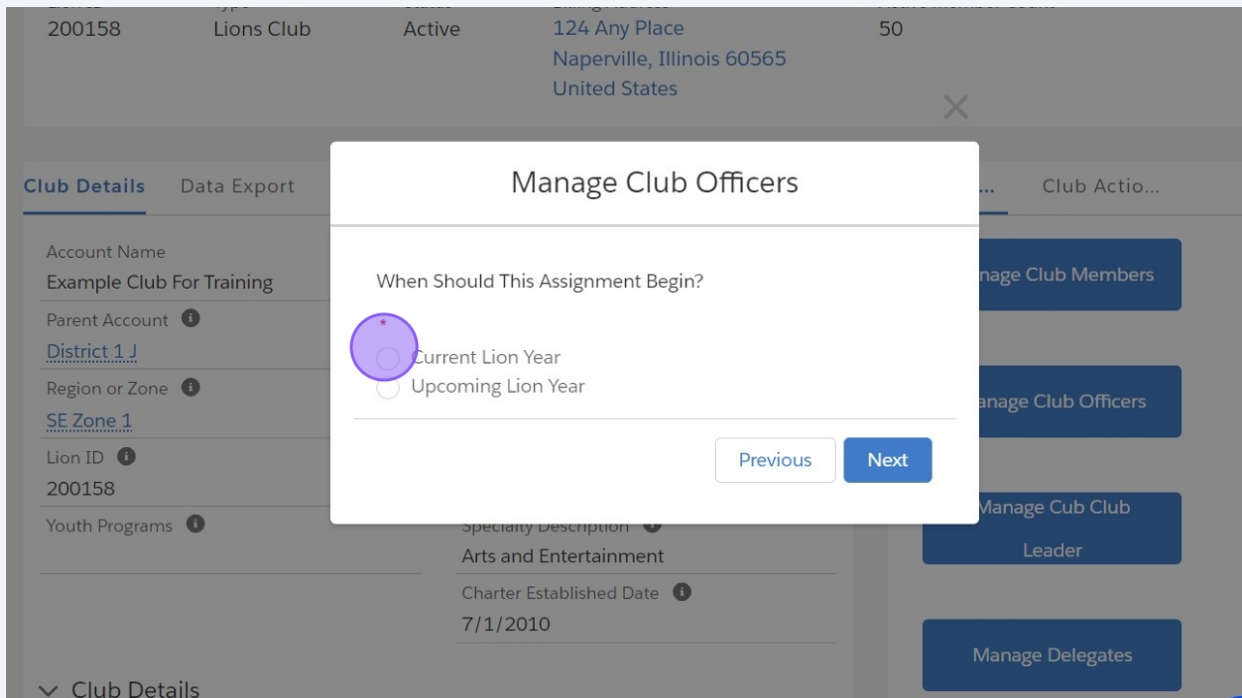


5 Click "Next"



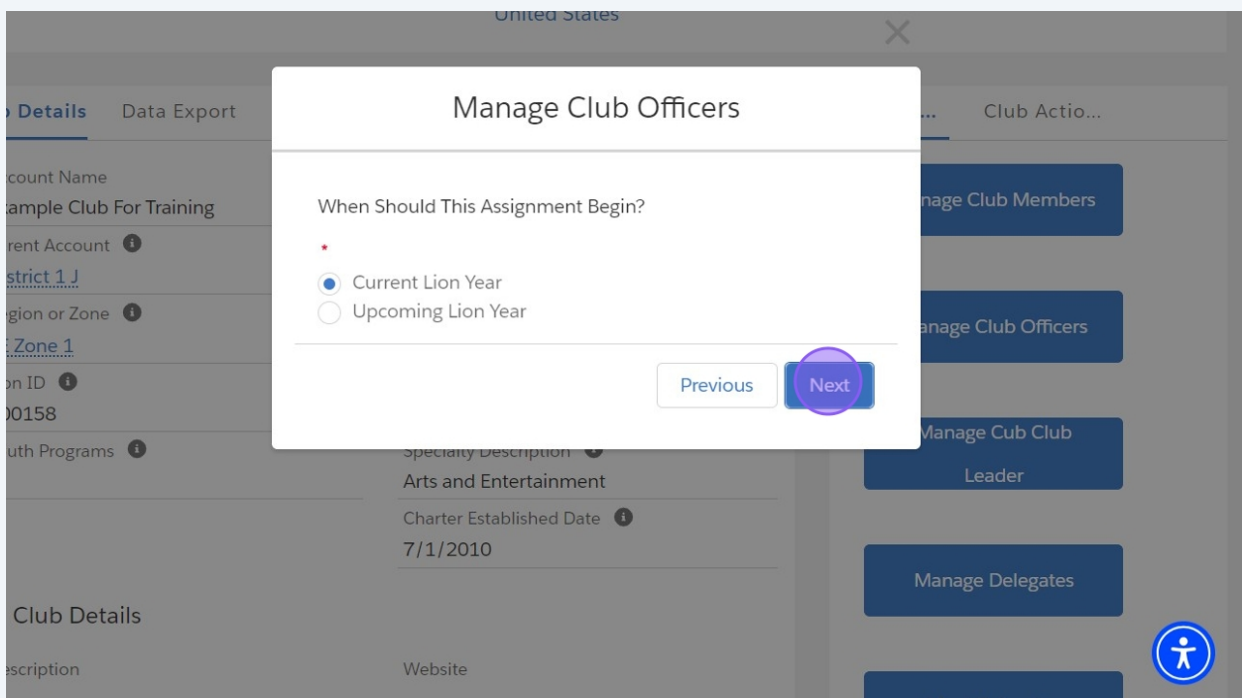
6

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



7

Click "Next"



8

Click this dropdown to select "Officer" or "Administrator" title type.

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

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

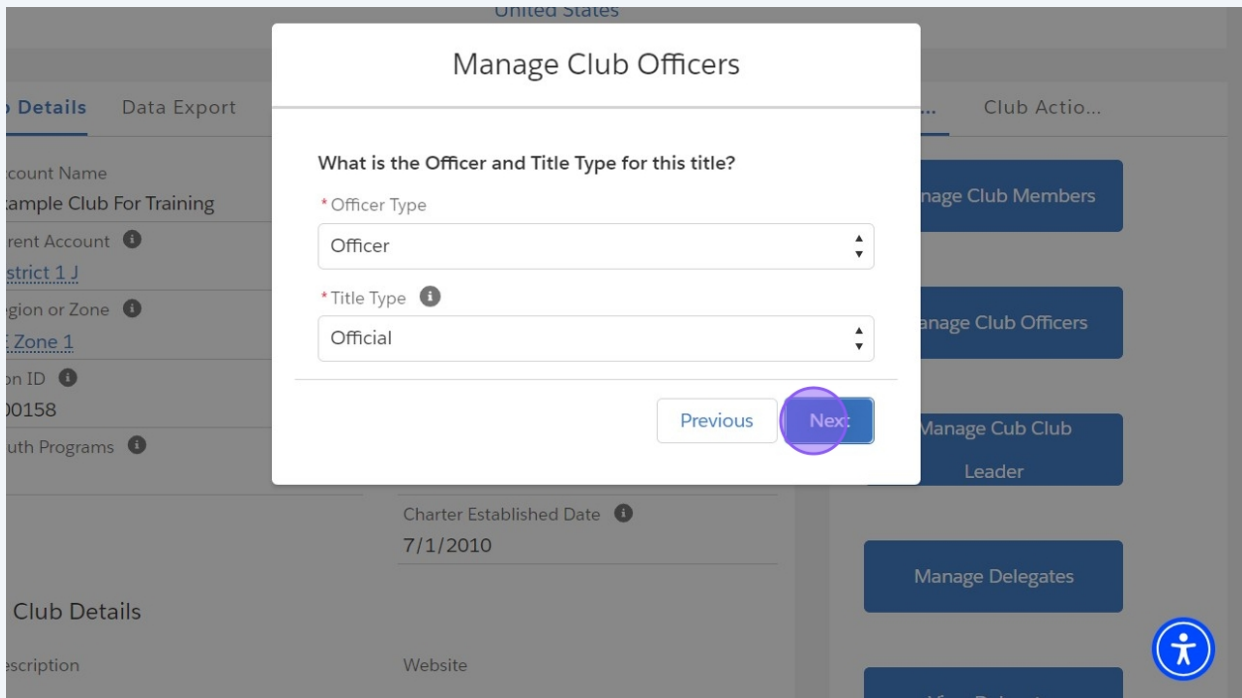
--None--
Official
Local

Club Details

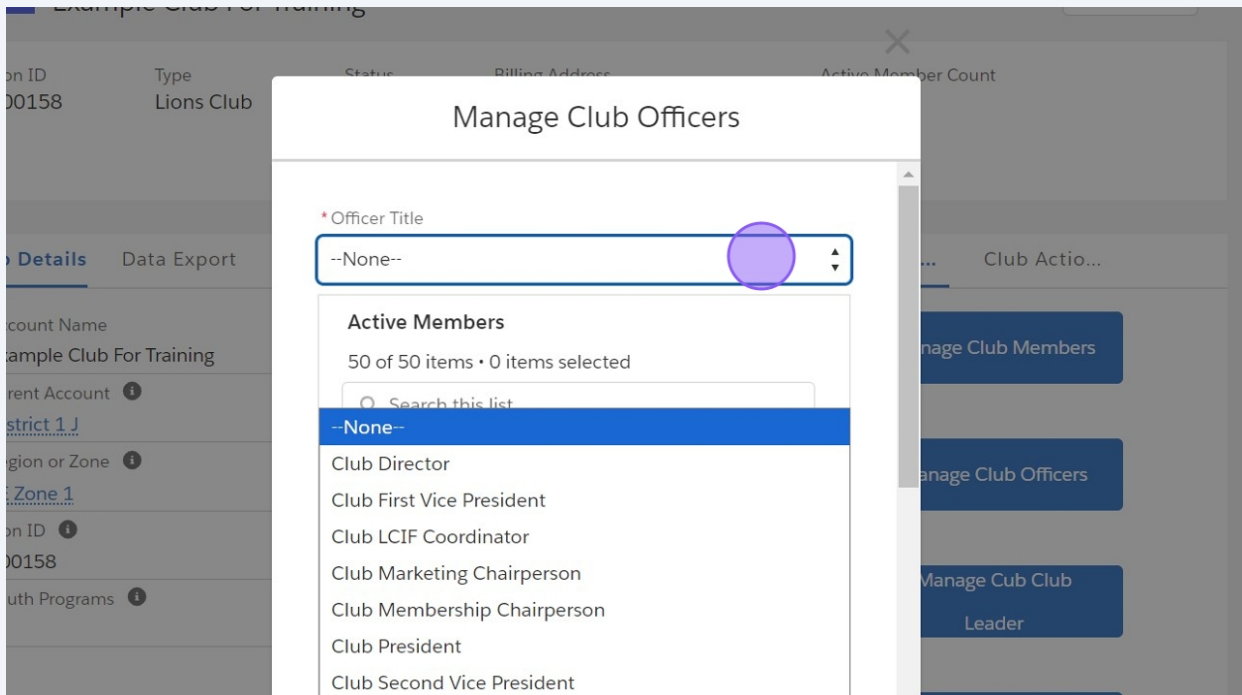
Description Website

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

10 Click "Next"

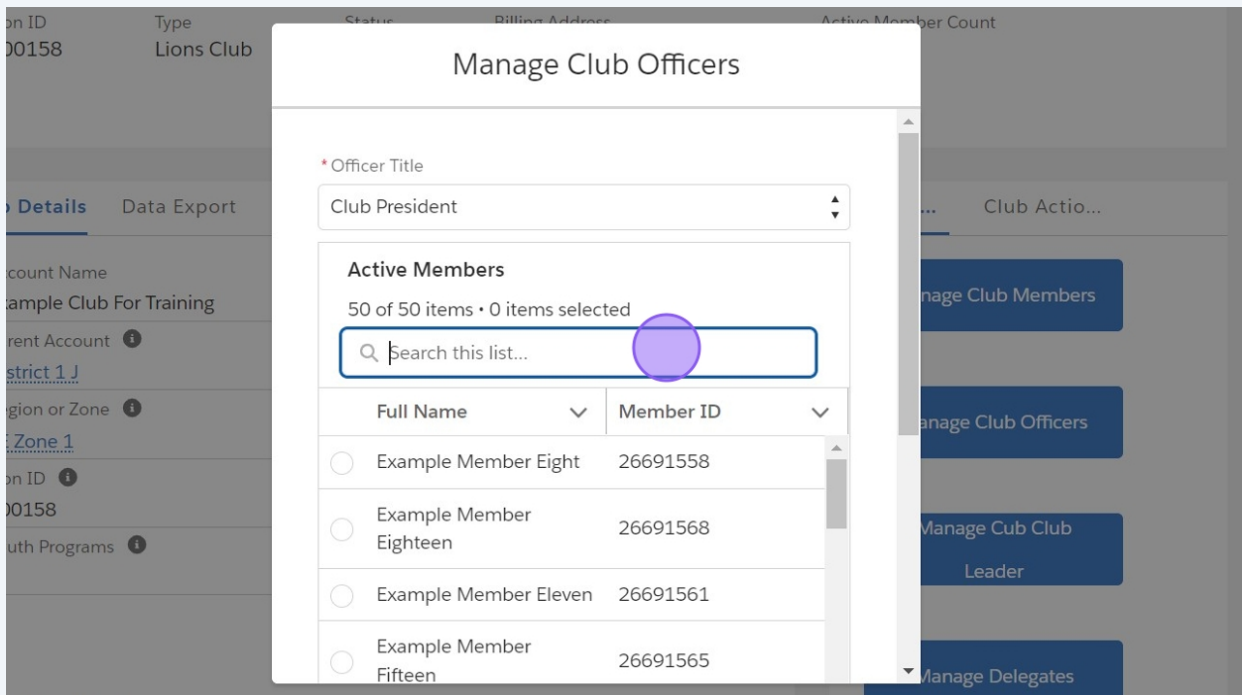


11 Click this dropdown to show the list of official titles which can be assigned.



12

To select the member for the title scroll through the list or Click the "Search this list..." to search and limit the list.



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.

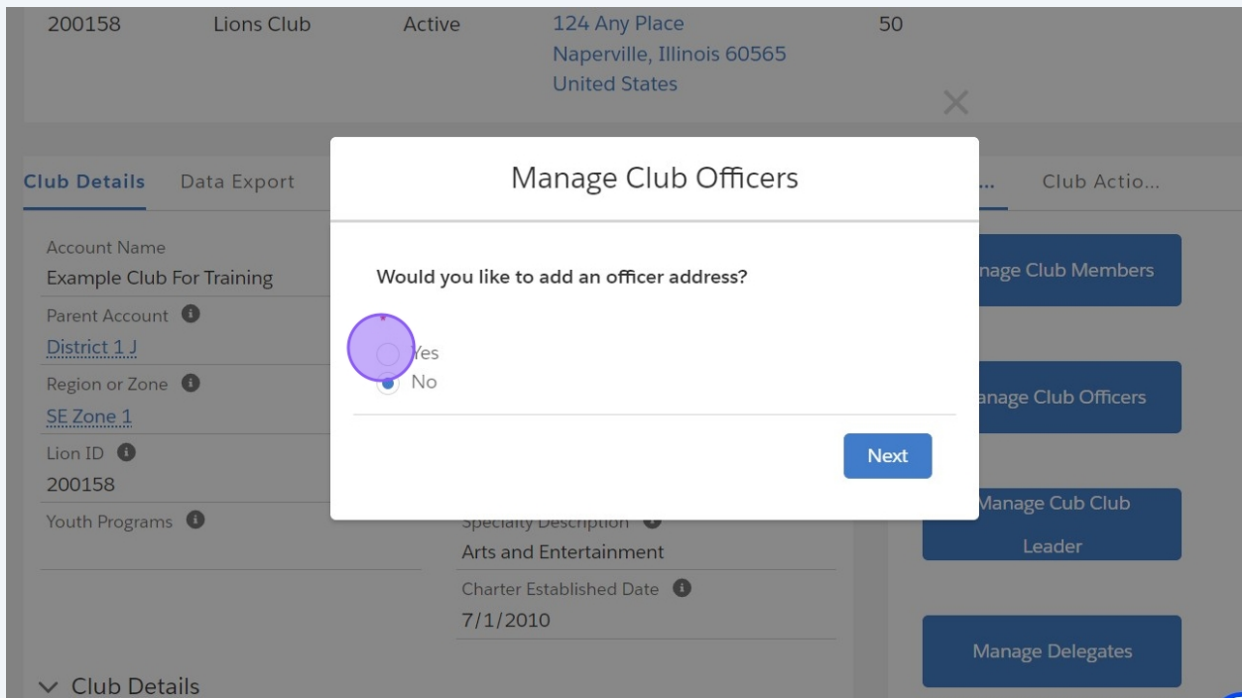
The screenshot shows a web application interface. On the left, there is a sidebar with 'Club Details' and 'Data Export' tabs. Below these are fields for 'Account Name' (Example Club For Training), 'Parent Account', 'District 1 J', 'Region or Zone' (SE Zone 1), 'Lion ID' (200158), and 'Youth Programs'. The main content area shows a dropdown menu for 'Officer Title' set to 'Club President'. Below this is a list of 'Active Members' with a search bar containing 'one'. The list has columns for 'Full Name' and 'Member ID'. The first row is 'Example Member Forty-One' with ID '26691591'. The second row is 'Example Member One' with ID '26691550', and its radio button is highlighted with a purple circle. The third row is 'Example Member Thirty-One' with ID '26691581'. The fourth row is 'Example Member' with ID '26691571'. On the right, there are buttons for 'Manage Club Members', 'Manage Club Officers', 'Manage Club Club Leader', and 'Manage Delegates'.

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

The screenshot shows the same web application interface as in step 14. The dropdown menu is still open, and the 'Example Member One' radio button is now selected, indicated by a blue dot. The 'Next' button at the bottom of the dropdown is highlighted with a purple circle. The 'Previous' button is also visible. The background shows the same sidebar and main content area as in step 14.

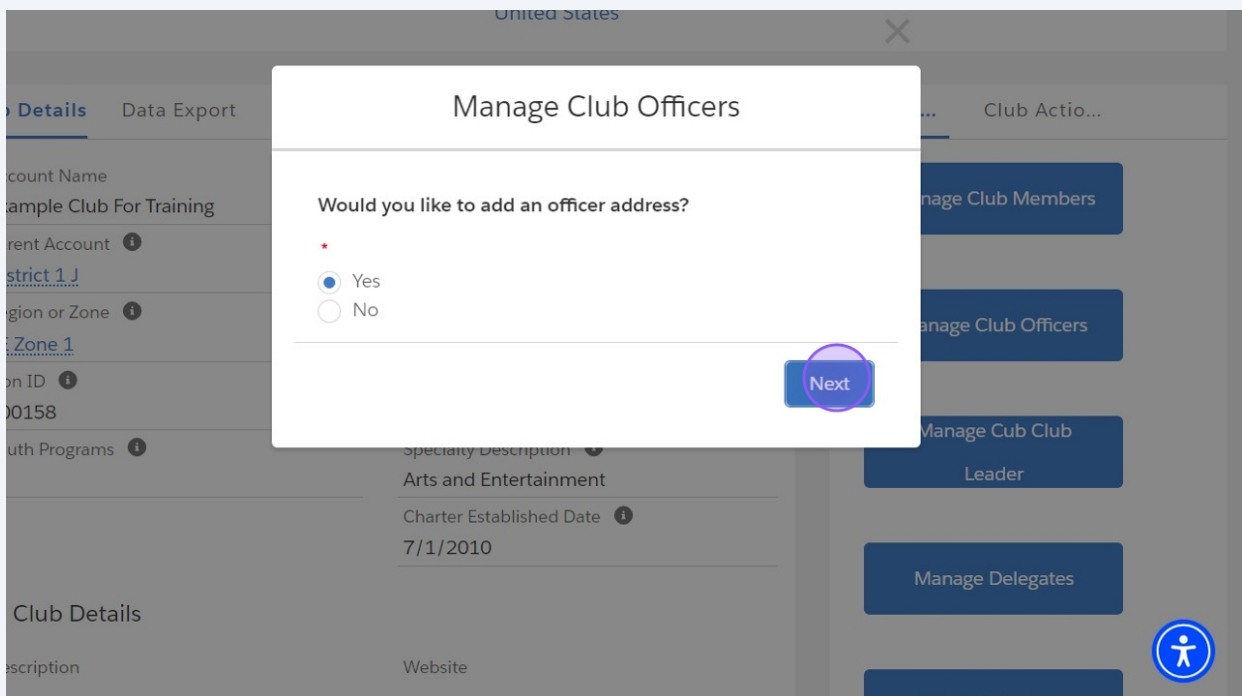
16

If you would like to add a additional address for the officer, select the "Yes" radio button.



17

Click "Next"



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:	Officer Address
3806 Gladstone Avenue Riverside, Illinois 60546 United States	Country: United States
	Street: 542 Main Street
	City: Riverside
	State/Province: [Dropdown]
	Zip/Postal Code: 60546

Buttons: 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]

Zip/Postal Code: 60546

Buttons: Previous, Save

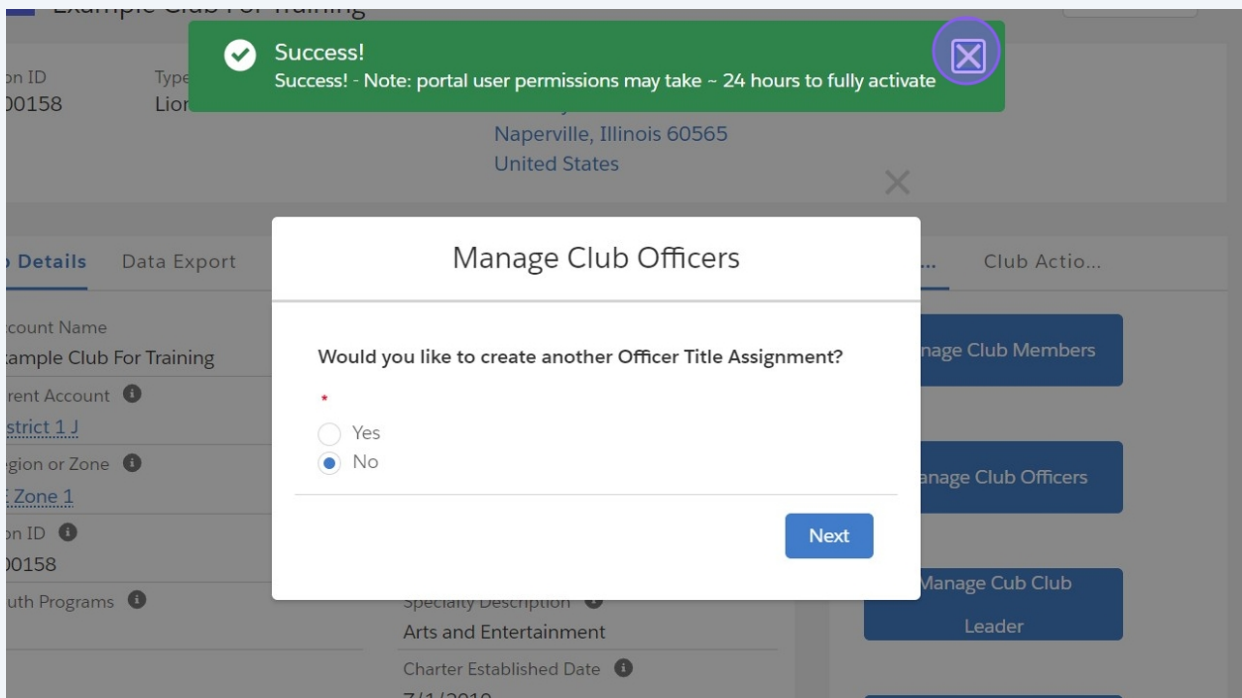


Alert! Specific permissions may take up to 24 hours to become effective. The time to create permissions and data shares takes longer the higher the level of position. Multiple District (longest time) down to the Club level (shortest). Club level permissions are generally available within 5 - 30 minutes.

20

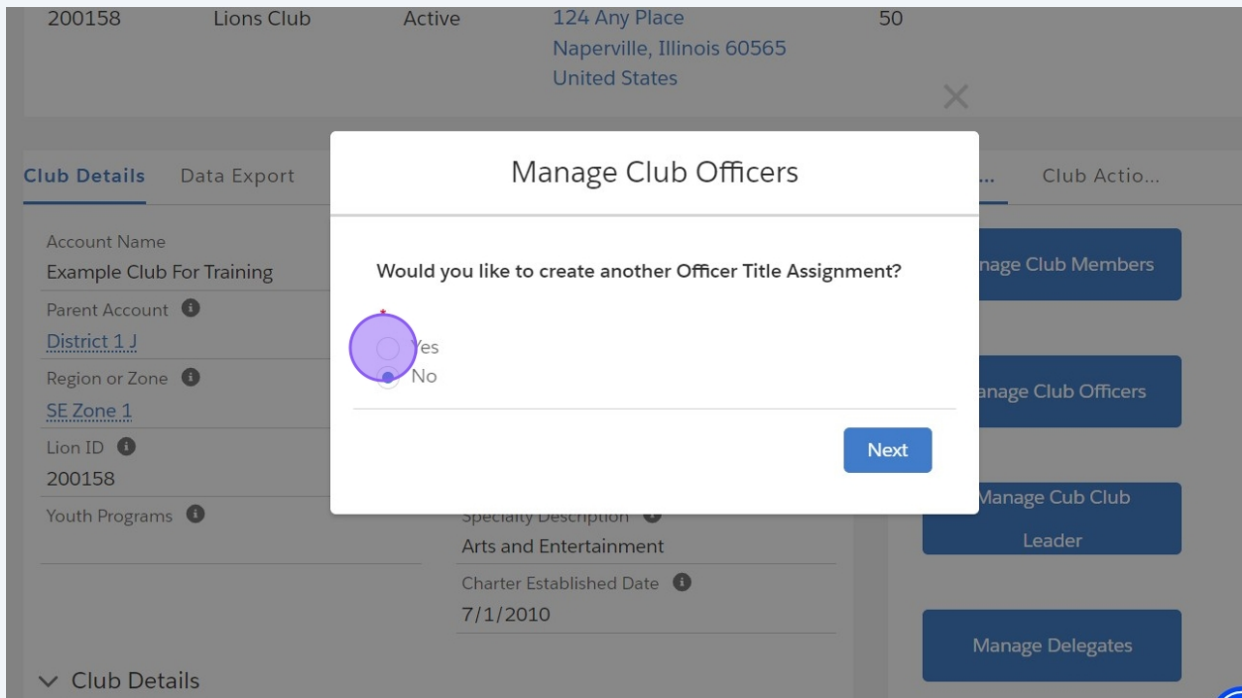
Upon creation of the assignment a green "Success!" message will appear. Click the "X" to close the message.

Select the "No" radio button to complete assigning officers.

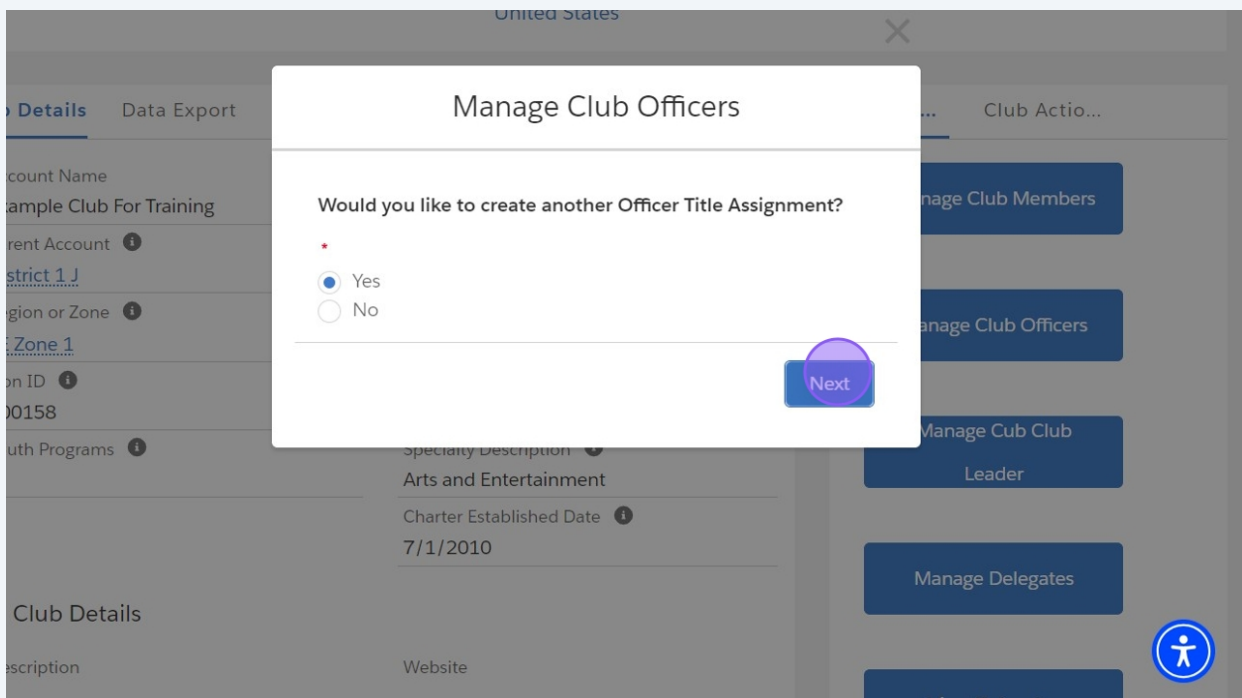


Tip! The following steps repeat the process to add another "Official" title. This example is the Club Administrator. Skip to step 32 for completing officer assignments.

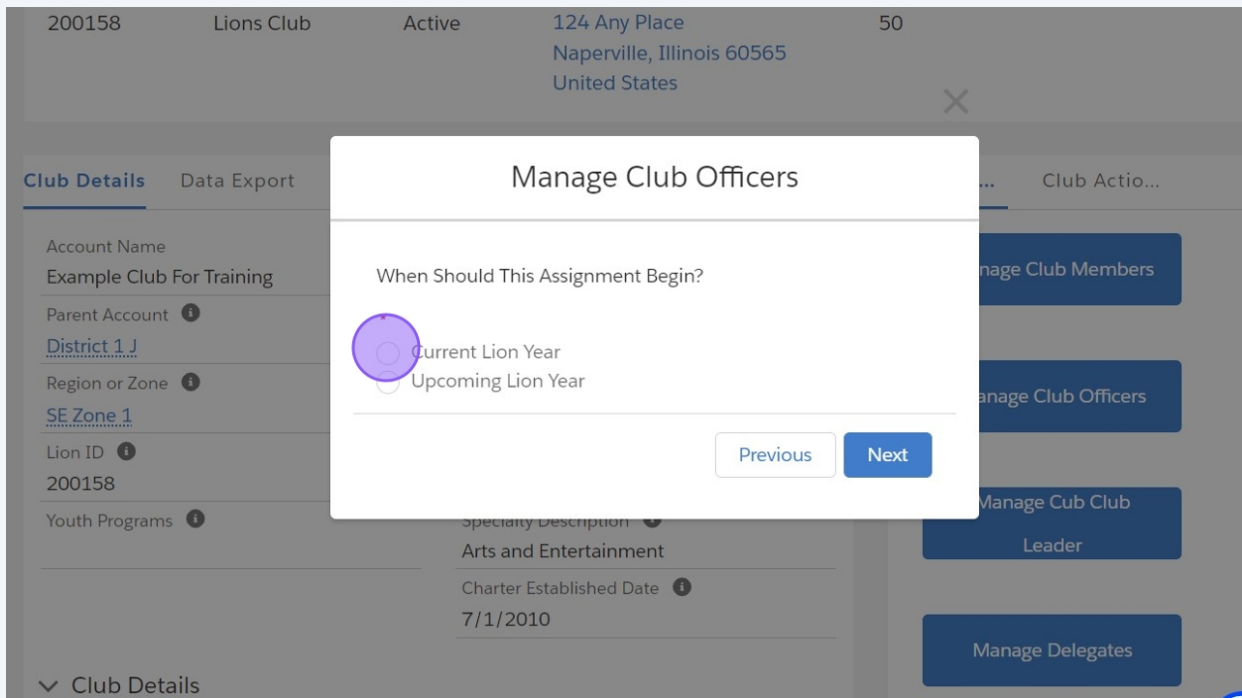
21 Select "Yes" to assign another officer. Select "No" to end adding officers.



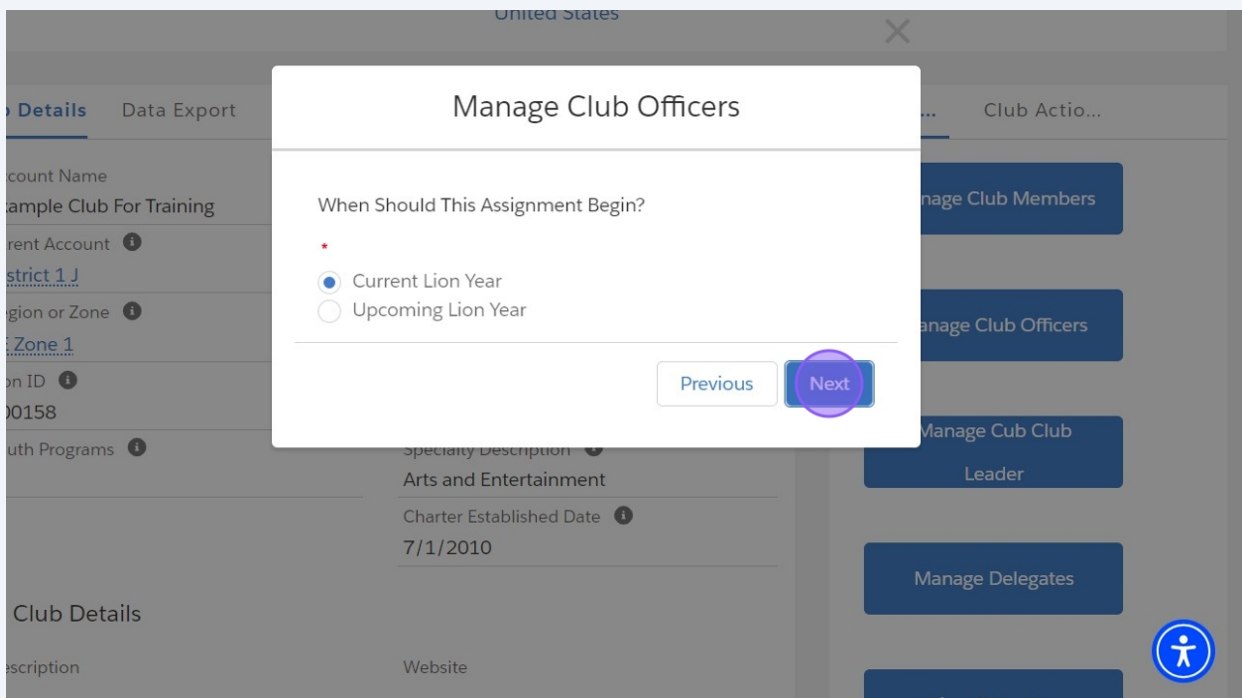
22 Click "Next"



23 Click here.



24 Click "Next"



25 Click this dropdown.

The screenshot shows a 'Manage Club Officers' dialog box overlaid on a club details page. The dialog box has a title 'Manage Club Officers' and a question 'What is the Officer and Title Type for this title?'. It contains two dropdown menus: '* Officer Type' and '* Title Type'. The '* Officer Type' dropdown is open, showing a list of options: '--None--', 'Officer', and 'Administrator'. A purple circle highlights the '--None--' option. The background shows club details for a Lions Club, including the address '124 Any Place, Naperville, Illinois 60565, United States' and the charter established date '7/1/2010'. Buttons for 'Manage Club Members', 'Manage Club Officers', 'Manage Club Club Leader', and 'Manage Delegates' are visible on the right side of the background.

26 Click "Next"

The screenshot shows the same 'Manage Club Officers' dialog box. In this step, the '* Officer Type' dropdown is now set to 'Administrator'. The '* Title Type' dropdown is set to 'Official'. At the bottom of the dialog box, there are two buttons: 'Previous' and 'Next'. The 'Next' button is highlighted with a purple circle. The background shows the same club details as in the previous screenshot, including the address and charter established date. A blue circular icon with a person symbol is visible in the bottom right corner of the background page.

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

Manage Club Officers

* Officer Title
Club Administrator
Please select a choice.

Active Members
50 of 50 items • 0 items selected

Search this list...

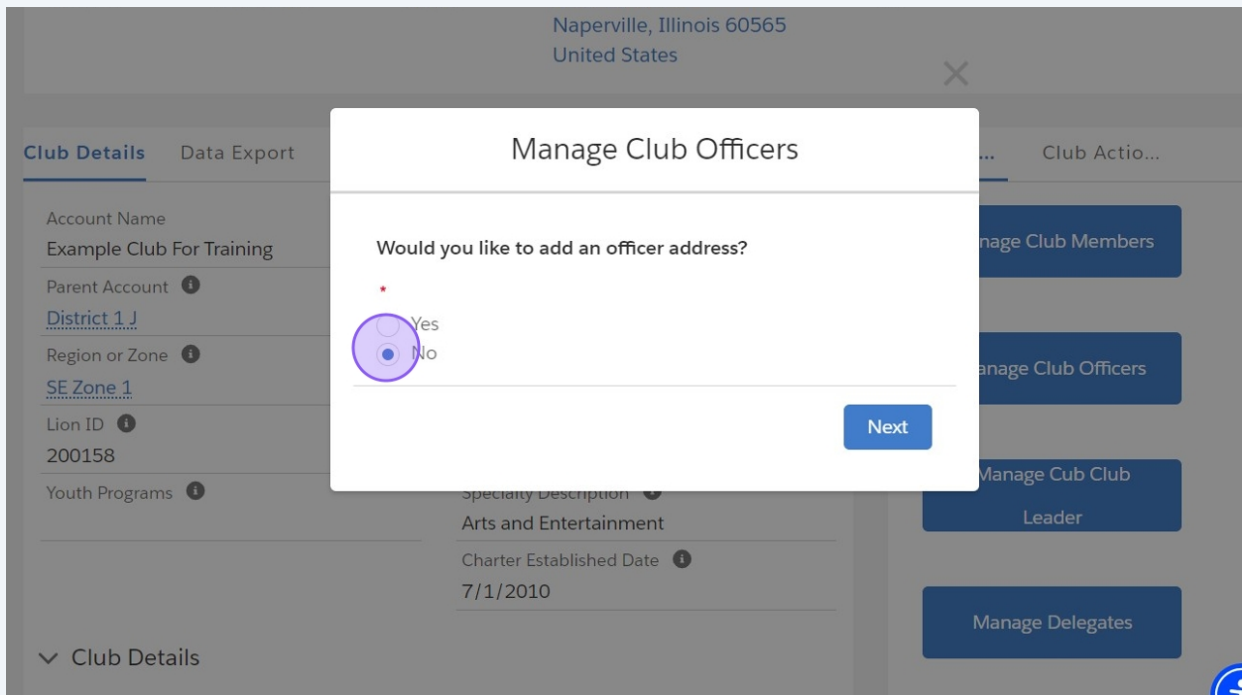
Full Name	Member ID
<input type="radio"/> Example Member Eight	26691558
<input type="radio"/> Example Member Eighteen	26691568
<input type="radio"/> Example Member Eleven	26691561
<input type="radio"/> Example Member	

28 Click "Next"

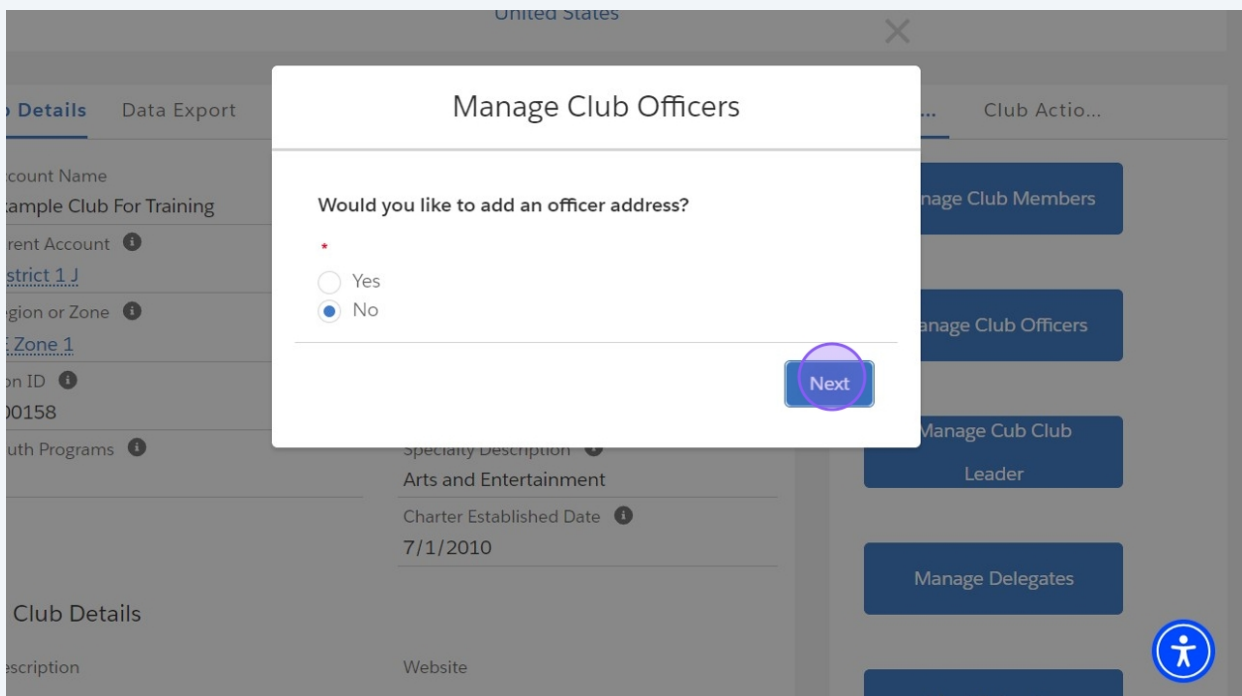
Full Name	Member ID
<input type="radio"/> Example Member Forty-Four	26691594
<input checked="" type="radio"/> Example Member Four	26691554
<input type="radio"/> Example Member Fourteen	26691564
<input type="radio"/> Example Member Thirty-Four	26691584
<input type="radio"/> Example Member Twenty-Four	26691574

Previous Next

29 Click "No" to skip adding an Officer address.

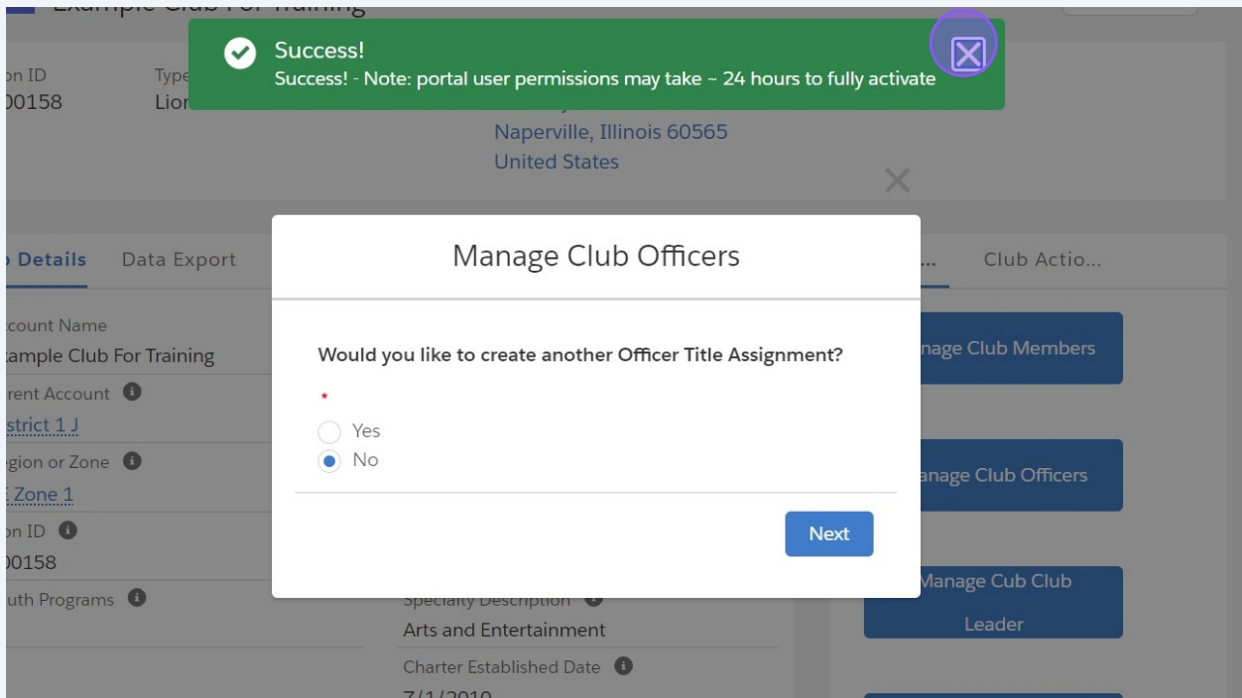


30 Click "Next"



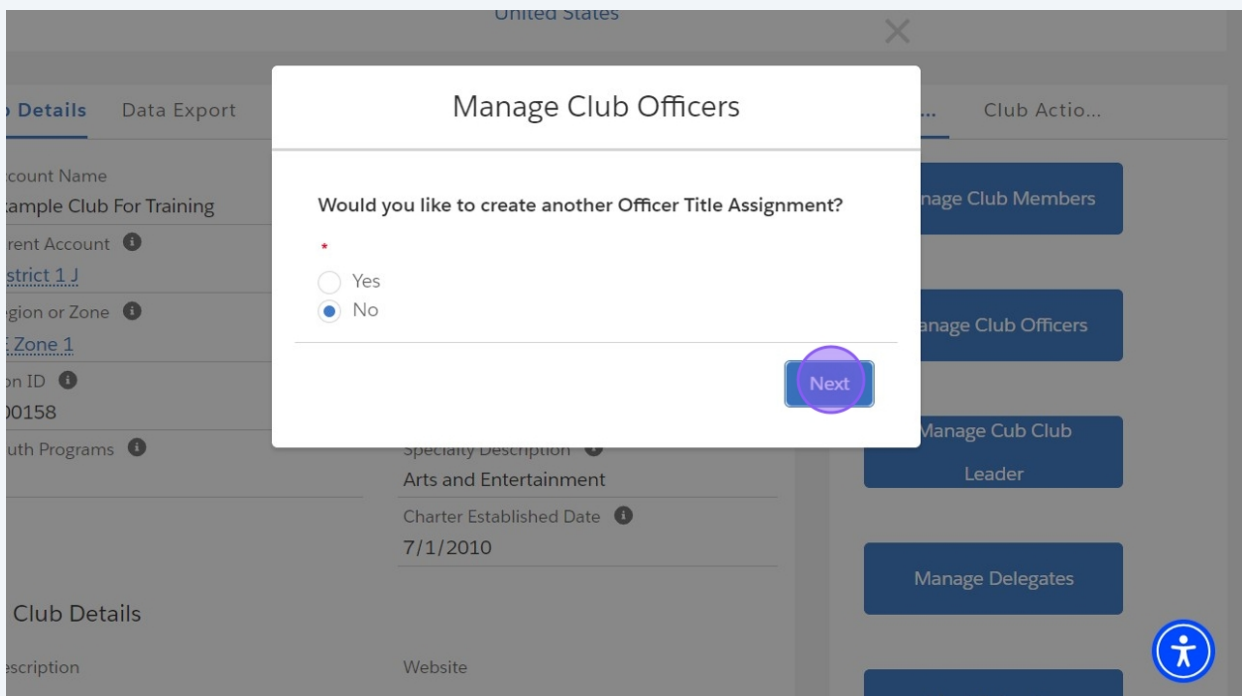
31

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



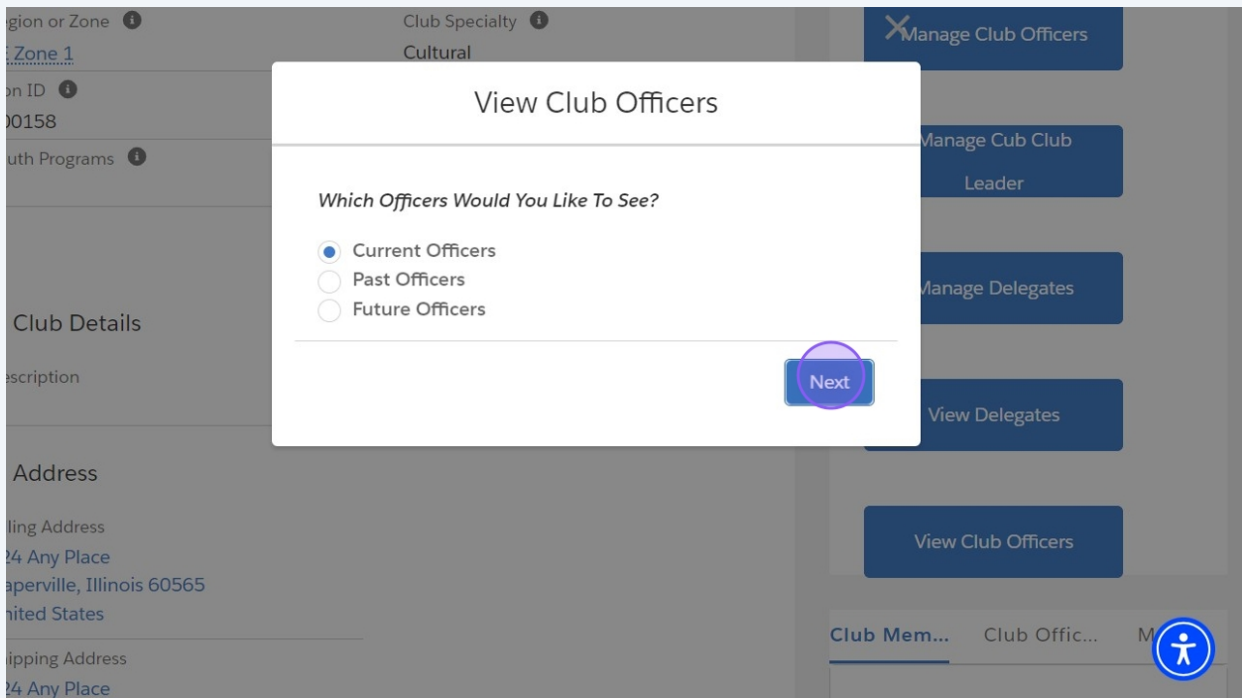
Tip! Reviewing Officer Assignments. This section shows how to review the assignments of officers.

33

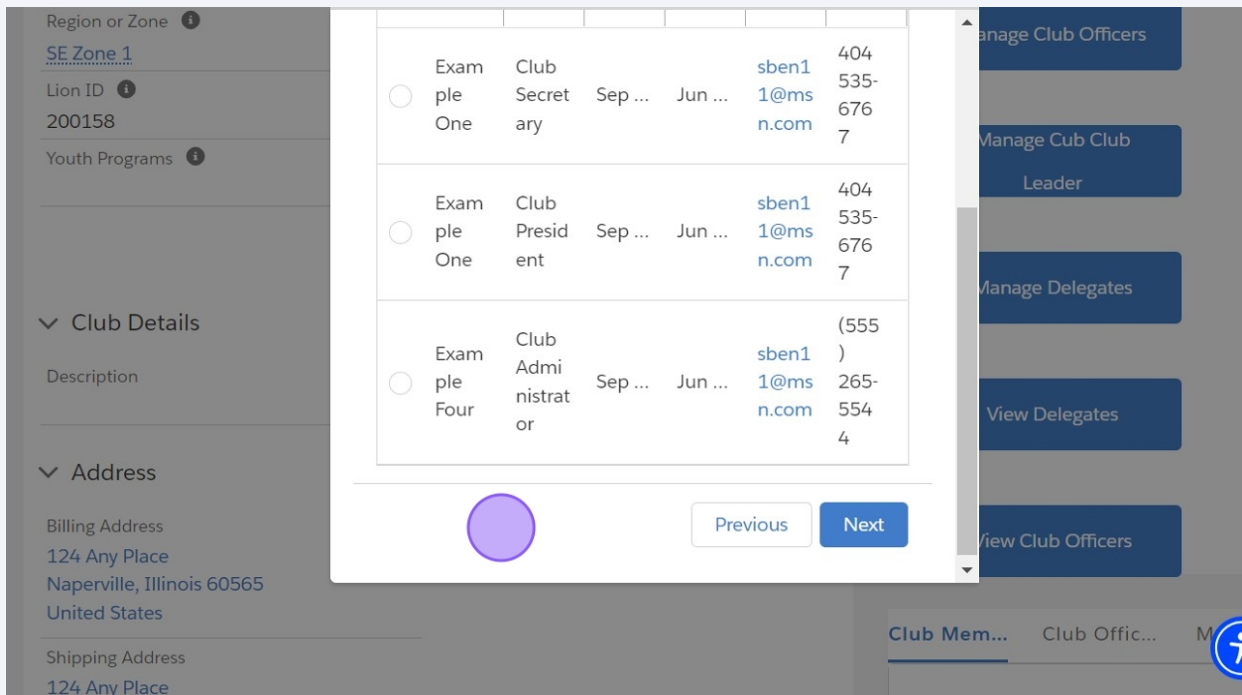
Click "View Club Officers"

The screenshot displays a club management interface. On the left, there are sections for 'Region or Zone' (Zone 1), 'Club ID' (00158), 'Club Programs', 'Club Details' (with a description field), and 'Address' (listing a mailing and shipping address at 24 Any Place, Naperville, Illinois 60565, United States). On the right, there are fields for 'Club Specialty' (Cultural), 'Club Sub-Specialty', 'Specialty Description' (Arts and Entertainment), and 'Charter Established Date' (7/1/2010). A 'Website' field is also present. A vertical sidebar on the right contains several blue buttons: 'Manage Club Officers', 'Manage Club Club Leader', 'Manage Delegates', 'View Delegates', and 'View Club Officers'. The 'View Club Officers' button is circled in purple. At the bottom of the sidebar, there are tabs for 'Club Me...', 'Club Offic...', and 'More...', along with a user profile icon.

34 Select the assignment to review. Current, Past, Future and Click "Next"



35 The list of officers is displayed



36 Click the "X" to Close this window

Officer	Role	Start Date	End Date	Email	Phone
<input type="radio"/> Exam ple One	Club Secretary	Sep ...	Jun ...	sben11@msn.com	404-535-6767
<input type="radio"/> Exam ple One	Club President	Sep ...	Jun ...	sben11@msn.com	404-535-6767
<input type="radio"/> Exam ple Four	Club Administrator	Sep ...	Jun ...	sben11@msn.com	(555) 265-5544

37 Click "Home"

Lion Portal 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

Account Name: Example Club For Training | Type: Lions Club

Parent Account: [] | Active Member Count: []

[Manage Club Members](#)

38

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

