


# 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](https://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

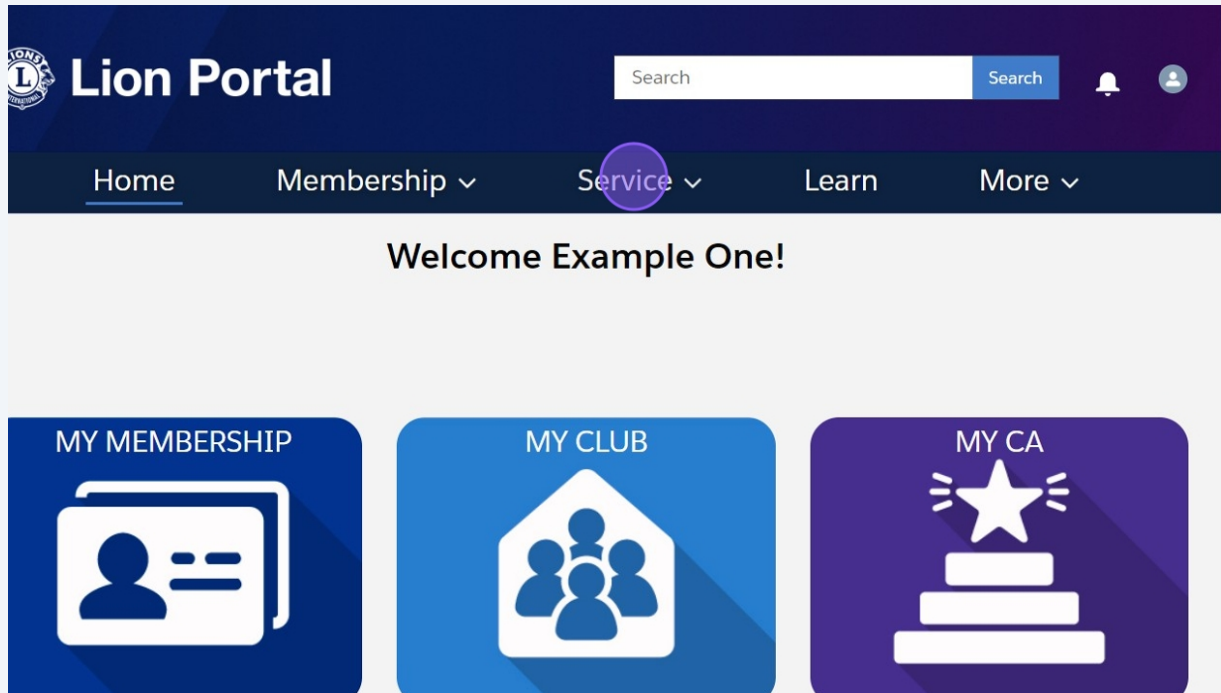
Both are shown



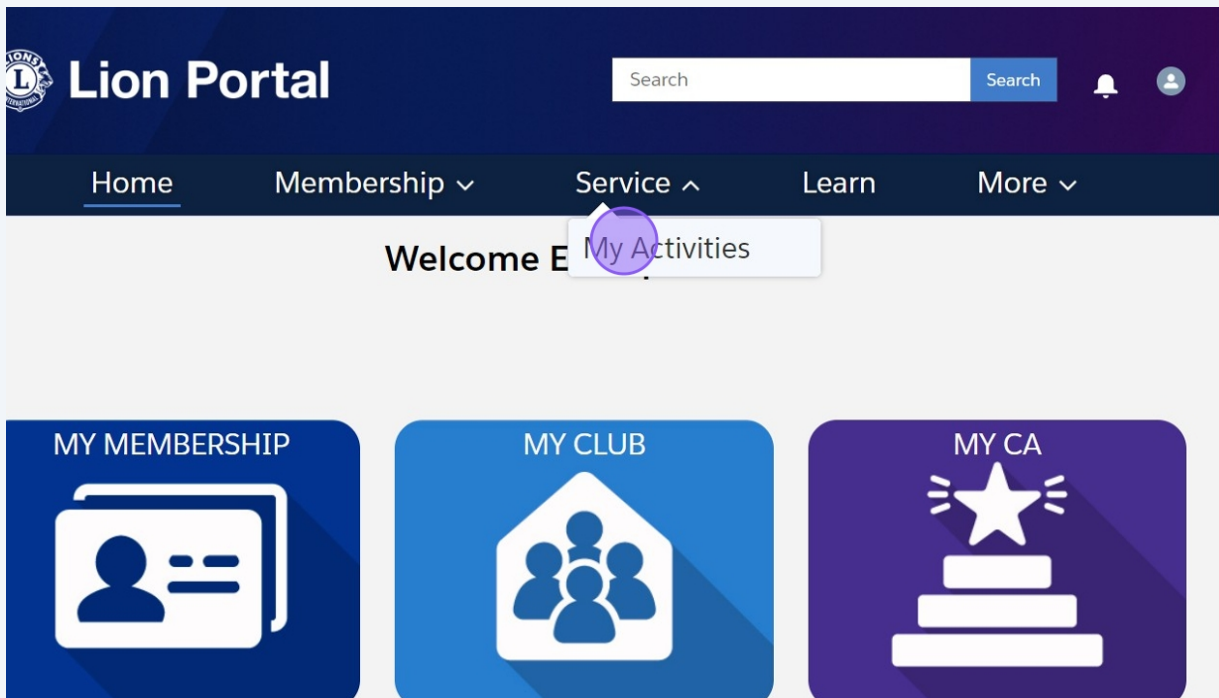
Locate from Service > My Activities

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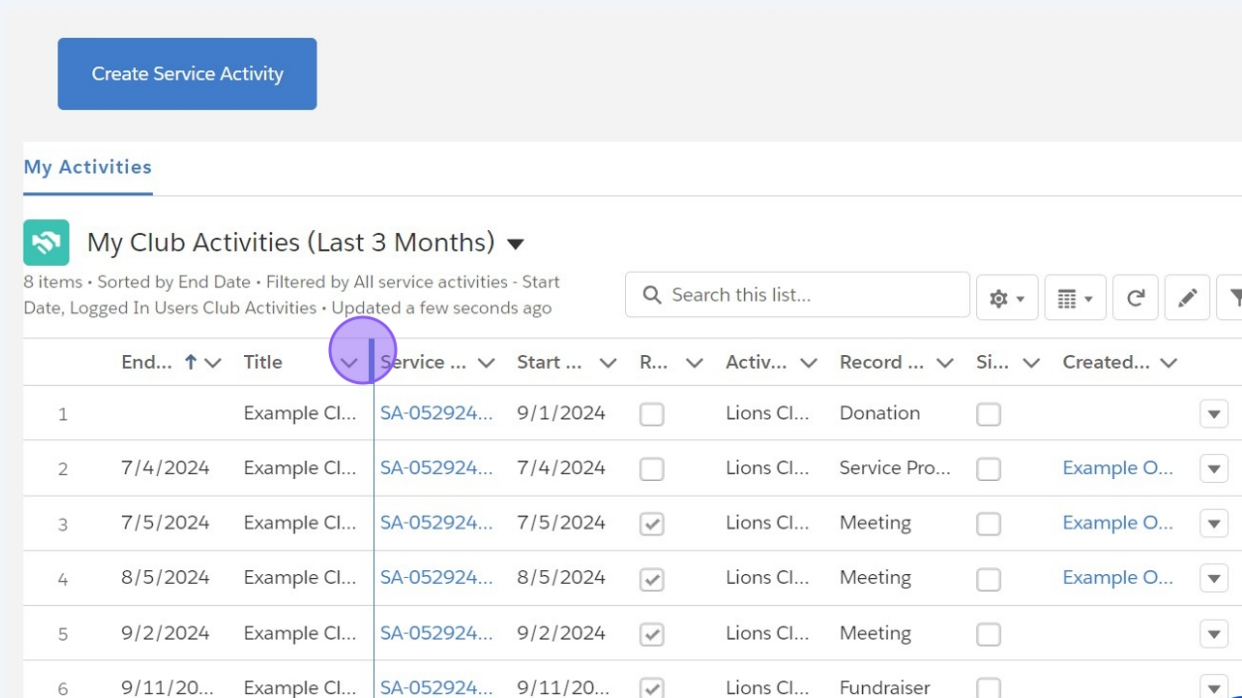
Click "Service"



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.



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...	<a href="#">SA-052924...</a>	9/1/2024	<input type="checkbox"/>	Lions Cl...	Donation	<input type="checkbox"/>	
2	7/4/2024 Example Club SA7...	<a href="#">SA-052924...</a>	7/4/2024	<input type="checkbox"/>	Lions Cl...	Service Pro...	<input type="checkbox"/>	Example O...
3	7/5/2024 Example Club SA1...	<a href="#">SA-052924...</a>	7/5/2024	<input checked="" type="checkbox"/>	Lions Cl...	Meeting	<input type="checkbox"/>	Example O...
4	8/5/2024 Example Club SA2...	<a href="#">SA-052924...</a>	8/5/2024	<input checked="" type="checkbox"/>	Lions Cl...	Meeting	<input type="checkbox"/>	Example O...
5	9/2/2024 Example Club SA2...	<a href="#">SA-052924...</a>	9/2/2024	<input checked="" type="checkbox"/>	Lions Cl...	Meeting	<input type="checkbox"/>	
6	9/11/20... Example Club SA5...	<a href="#">SA-052924...</a>	9/11/20...	<input checked="" type="checkbox"/>	Lions Cl...	Fundraiser	<input type="checkbox"/>	
7	9/15/20... Example Club SA3...	<a href="#">SA-052924...</a>	9/15/20...	<input checked="" type="checkbox"/>	Lions Cl...	Service Pro...	<input checked="" type="checkbox"/>	

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

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

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 Report Complete [1] [Share] [Edit]

Title [i]

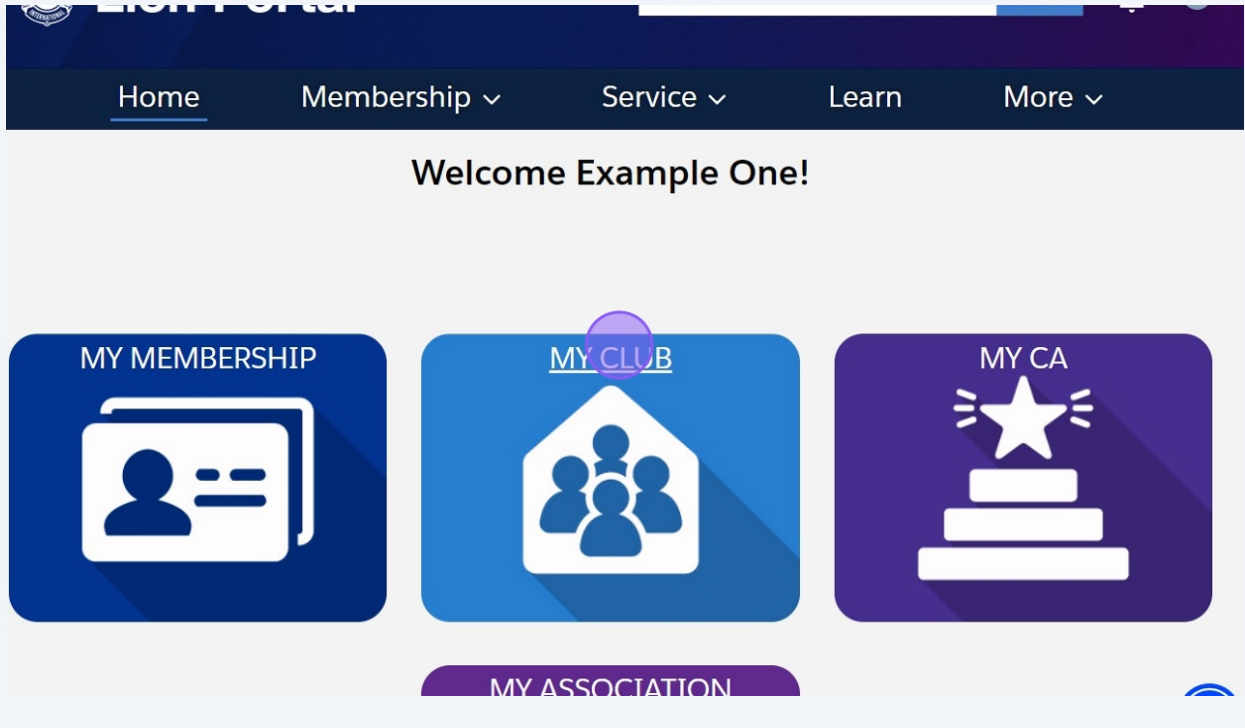
Image Gallery: [Image of a service project]



Locate from My Club > Club Service Activities Tab

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Click "MY CLUB"



8 Click "Club Service Activities" tab

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

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

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	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 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	✓

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 ...	<a href="#">SA-05292416</a>	7/5/2024	<input checked="" type="checkbox"/>
2	8/5/2024	Example Club ...	<a href="#">SA-05292417</a>	8/5/2024	<input checked="" type="checkbox"/>
3	9/15/2024	Example Club ...	<a href="#">SA-05292418</a>	9/15/2024	<input checked="" type="checkbox"/>
4	9/17/2024	Example Club ...	<a href="#">SA-05292419</a>	9/17/2024	<input checked="" type="checkbox"/>
5	9/11/2024	Example Club ...	<a href="#">SA-05292420</a>	9/11/2024	<input checked="" type="checkbox"/>
6		Example Club ...	<a href="#">SA-05292421</a>	9/1/2024	<input type="checkbox"/>
7	9/2/2024	Example Club ...	<a href="#">SA-05292422</a>	9/2/2024	<input checked="" type="checkbox"/>
8	7/4/2024	Example Club ...	<a href="#">SA-05292423</a>	7/4/2024	<input type="checkbox"/>

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  
Report Complete



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

The screenshot shows the Lion Portal interface. At the top, there is a search bar and navigation links for Home, Membership, Service, Learn, and More. Below the navigation, a service activity card is displayed for 'SA-05292423'. The card includes fields for Name (Example Club SA7 - Service Project Surfing), Sponsor (Example Club For Training), and Status (Ready to Report). There are buttons for Edit, Copy (highlighted with a purple circle), and Delete. Below the card, there are tabs for Details and Image Gallery. The Details tab is active, showing an Information section with fields for Record Type (Service Project), Report Complete (checkbox), and Title.

## 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.

The screenshot shows the Lion Portal interface with a green success message overlay. The message reads: 'Success! Here is your copied activity. Begin editing now.' and has a close icon (an 'X' in a circle). The service activity card below shows the same activity as in the previous screenshot, but the Status is now 'Draft'. The 'Copy' button is highlighted with a purple circle. The rest of the interface, including the navigation and details sections, remains the same.





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

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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	Report Complete <i>i</i> <input type="checkbox"/>
Title <i>i</i> Example Club SA7 - Service Project Surfing	
Sponsor <i>i</i> <a href="#">Example Club For Training</a>	Cause Vision
Activity Level Lions Club	Project Type Other
Status <i>i</i> Draft	Description <i>i</i> 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

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

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

The screenshot shows a web form with a 'Details' tab and an 'Image Gallery' sub-tab. The form contains several fields: 'Record Type' (Service Project), 'Report Complete' (checkbox), '\* Title' (text input with a purple circle around it), '\* Sponsor' (dropdown menu), '\* Cause' (dropdown menu), 'Activity Level' (Lions Club), and 'Project Type' (dropdown menu). A 'Save' button is highlighted in blue. A note on the right says 'Use the Upload Images tab to begin uploading images.'

16 Click "Save"

This screenshot is identical to the previous one, but the 'Save' button is now highlighted with a purple circle. The 'Title' field is no longer highlighted. The 'Save' button is highlighted in blue.



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

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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.


The screenshot shows a web form with the following elements:


- Details** / Image Gallery
- \* = Required Information
- Information** section:
  - Record Type: Service Project
  - Report Complete:
  - \* Title: Example Club SA8 - Service Proje
  - \* Sponsor: Example Club For Training
  - \* Cause: Vision
- Red error message: **We hit a snag.** Review the following fields: Start Date
- Buttons: Cancel, Save

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Clicking 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 date field at the top that has a red border and a yellow error message: "Complete this field with format M/d/yyyy." Below this is another date field labeled "End Date" with a calendar icon and the format "M/d/yyyy". A section titled "Required Metrics" is expanded, showing 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 field for "Non-Lion Family Members Participated". At the bottom of the form are "Cancel" and "Save" buttons. A user profile icon and name "Example One, 9/22/2024, 9:16 AM" are visible in the top right corner of the form area.

 End of In-line edit method example

 Pop-up form method example

19 Click "Edit"

The screenshot shows a web application interface for managing service activities. At the top, there is a navigation bar with links for Home, Membership, Service, Learn, and More. Below the navigation bar, the header of the record shows "Service Activity SA-05292424" with an "Edit" button circled in purple. The record details include: Title: Example Club SA8 - Service Project Surfing; Sponsor: Example Club For Training; Status: Draft. Below the details, there are tabs for "Details" and "Image Gallery". The "Details" tab is active, showing an "Information" section with fields for Record Type (Service Project), Title (Example Club SA8 - Service Project Surfing), Sponsor (Example Club For Training), Report Complete (checkbox), Cause (Vision), and Project Type. To the right of the "Details" tab, there is an "Image Gallery" section with an "Upload Images" button and a message: "Use the Upload Images tab to begin uploading images."

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

The screenshot shows the "Information" edit form for the service activity record. The form is titled "Information" and includes a legend: "\* = Required Information". The fields are: Record Type (Service Project), Report Complete (checkbox), Title (Example Club SA8 - Service Project S), Sponsor (Example Club For Training), Cause (Vision), Activity Level (Lions Club), and Project Type (Other). There are "Cancel" and "Save" buttons at the bottom of the form. A purple circle highlights the "Save" button. The background shows the same record details as in the previous screenshot, but they are dimmed.



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.

Example Club SA8 - Service Project Surfing      Sponsor [Example Club For Training](#)      Status Draft

Details      Image Gallery

Imag...      Uploa...

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

Information

Record Type Service Project	Report Complete <input type="checkbox"/>
Title Example Club SA8 - Service Project Surfing	Cause Vision
Sponsor <a href="#">Example Club For Training</a>	Project Type Other
Activity Level Lions Club	Description We partnered with another club and a local surfing based youth
Status Draft	

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

The screenshot shows the Lion Portal interface. At the top, there is a search bar and navigation links: Home, Membership, Service, Learn, and More. Below the navigation, there is a section for 'Service Activity SA-05292424' with 'Edit', 'Copy', and 'Delete' buttons. The main content area displays a table with columns for Title, Sponsor, and Status. The 'Sponsor' column contains a link to 'Example Club For Training', which is circled in purple. A modal window is open over this link, showing details for 'Example Club For Training' including Lion ID (200158), Type (Lions Club), Status (Active), and Billing Address (124 Any Place, Naperville, Illinois 60565, United States). The modal also has tabs for 'Details' and 'Image Gallery'.

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

The screenshot shows the Lion Portal interface with the 'Home' button in the navigation menu highlighted with a purple circle. Below the navigation, there is a section for 'Account Example Club For Training' with a '+ Follow' button. The main content area displays a table with columns for Lion ID, Type, Status, Billing Address, and Active Member Count. The 'Home' button is highlighted in purple.

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

