Portal login

* One very important factor you need to know before you start. If you use a joint email address that is used by you and your spouse/significant other, that email CANNOT BE USED HERE! Every Lion who uses the portal needs a unique email all their own. You will need to make a new email address.

Example: You and your spouse/significant other use one email at home. You aren't going to change that or get rid of it. The people and the companies you correspond with have it so you will be leaving it alone. Your club may already have that special email set up and some do in this District. Find out and make note of the email and it's password. If they don't then it's easy to do. There are websites in hotmail and google and others where you can designate a specific email for club use only.

Some suggestions you can use:
  secretary@mulvalelions.com
  mulvalelcsecretary@gmail(or hotmail).com
  secretarymlc@gmail.com
  mulvalelionssecretary@hotmail.com

* These don't exist, but I think you get the idea. When making up your email address, make a club specific password for it. Some sites will ask you to use upper and lower case along with a symbol and number. Remember that you won't be the secretary forever, so write both down and save so that the next Lion taking over that position will be able to use that same email. The password can always be changed by each incoming secretary.

* Don't forget that this new email needs to be changed in our District Directory, the Portal under your name, your club Facebook page, e-clubhouse and sent to your club members.

LIONS - Reporting Service

If you did not enter your executives for this current year before June 30th, you will need to get in touch with Lion Theresa Hewitt - lionthewitt@gmail.com She will get you started back into the portal. Adding the incoming executives is something that **needs to be done before the 30th of June** each Lions calendar year.

To enter the portal go to this site:

https://lionsinternational.my.site.com/s/login

- Enter your user name (it's your email address that is already in the system for Lions correspondance). If you don't have a password or an account, then below the 'login in' click on either 'forgot your password' or 'don't have an account'. Follow the prompts for either. PLEASE MAKE NOTE OF BOTH FOR THE FUTURE!

- Come back to the log in screen and then enter the user name and password, but don't hit the log in button, just hit enter or you'll be fighting with it to accept your info.

- This is where you will enter all your club's activities and meetings.

- Once you're in the site you will see "Lion Portal" and tabs directly under that. Click on "service". A small dropdown menu will show with "my activities". Click on that.

- You'll then see a new page with a "create service activity" button at the top. Click on that.
(Yes, lots of extra menus now.) This will also give you a list of your club's activities. Those without a check in the 'Reported' box needs to be completed.

- At the top of this screen, a box with "create service activity" will come up and you click on the button beside your club name. Then click on 'next'.

- Enter a title for the service activity - Dinner meeting, or food booth, or

whatever the activity happens to be.

- Under Activity type, choose one: donation, fundraiser, meeting, service project - click on that. Click on "next".

- Fill in the report information, but don't click on 'report complete' till you're absolutely sure you have given all the information needed. You can click on 'save' at the bottom if you're waiting on information and it will save as a draft.

- Make sure you enter the number of volunteers and the total number of hours for all the volunteers, both Lions and non-Lions, for that event. Include the pre-activity numbers and times as well as any clean up times and number of helpers. If you or any of the volunteers have travel times, it must be counted in with the times. It all counts!

- When filling in for your dinner or general meetings, fill in the information section and the required metric section on the left side of the page. Also complete the cause, project, and description just to the right of that part. This all counts as service!

- If you have any funds raised, click on 'optional metrics' and the type of currency under that heading. Click on 'currency' - Canadian funds. Once you save as a draft or a final report, it will convert to 'Funds USD' to the right of your entry. The same with any funds that are donated. If your club is donating to an organization, fill that information as well.

- You may need to add 'Additional Details'. If it is a signature activity, an activity that your club does on a regular basis - like a spaghetti dinner, a community breakfast, tool booth, etc, then this is where you add the extra information.

- Some activities might be funded by an LCIF grant, so you would click on that.

- Fill in all the information under 'details'.

-At this point, **DO NOT CLICK ON THE 'REPORT' BOX YET!** If you just hit 'save' then exit out of that screen, your work is saved which means that it is still in draft format so you can come back at a later date to complete the

missing information for your activity.

- When you are absolutely sure that you have all the information to report, go back to the top of that page and then click on the little edit pencil box 'report'. This is where you check the box to finalize the report. Then click on the 'save' button.

- You have completed your report.

- You can go back into the portal anytime. Follow the prompts to the 'service' and 'activities'. You will come to a page that gives you a list of what your club has reported but only in the last three months in both draft and final report. Click on the 'Service Activity' number, it's the blue highlighted number, to return to that event if you want to see what've you've done.

Final note- If for some reason, when looking at the list of activities, one of the "Reported" boxes isn't checked, then click on the blue highlighted "control" number for that activity and complete it with whatever information is needed. It must be finalized as "Reported".

Reporting Service   -   One point to remember

The portal only gives you 3 months in which to report your club's service.

If you forget or have to play catch up, then you take the last date the system will allow and in the 'description box', type in that the event took place on such and such a date. Then fill in the details of that event...all the rest of the info like the number of Lions, non-Lions and Lions family members, if it was a signature event, how much in Canadian funds was raised, and if it was going to a spacific person or agency, etc.

Please don't wait too long to enter events or you will need to do this when your memory might not be at it's best. lol I know that could be an issue!

Thank you!

Adding a new member

In order to add a new member once you are signed into the Portal, these are the steps to take:

- Make sure that all the information on the application is readable. If you have trouble reading what was written then ask!! Print what they tell you is correct instead of guessing. Chances are 50/50 you could be wrong!

- Once you sign into the Portal, you will have choices to choose from, so click on "my club"

- You will see your club with its relevant information as to ID number, the type of club it is, it's status, and the number of current members.

- Look down the right side of the screen and you will see 'Member Actions' and 'Club Actions'.

- Make sure 'Member Actions' is highlited.

- You will see a list of blue 'blocks' and you need to click on 'Manage Club Members'.

- A new window will open up with a list of items to manage your members:
 *Add New Member
 *Edit Member
 *Reinstate Member
 *Transfer Member
 *Drop Member

- To **ADD**, click on the circle beside 'Add New Member' then 'Next'.

- Fill in the first name, last name, date of birth and gender.

- When you click on 'Gender', it will give you 4 choices... - Male ... - Female ... - Non-Binary ... - Prefer not to answer. Make sure that the new member is aware of the choices and let them tell you the one they want you to enter. This is very important and especially these days!

>**NOTE** - the system will not let you proceed unless these four spaces are filled in.*

>Click on 'Search'.

>As this person is new to Lions, the screen will expand so you can fill in the rest of the information like nickname, prefix (Mrs, or Mr, or Ms, Dr, Prof, etc) and suffix (M.Div, DSC, B.Sc, etc.)

>Fill in the address as it's written on the application form as well as email address(es), phone number(s), and occupation. Add spouse name if there is one. If for some reason you can't read what they have written, then ask! Also make sure you have their correct birthdate. eg. If they wrote 8/4/70, is it Aug 4 or Apr 8?? It will be harder to change if you put in the wrong date!

>Before clicking on Next, make sure that everything that you have entered into this screen is correct!

>Once you are absolutely sure the information is correct, then click on Next.

>The next screen you see will ask for the membership start date and type. That is the date they were inducted and that's the date that needs to be entered. In this screen you will click on 'Regular Member'.

>**NOTE** - the system will not accept the new member the day of induction, but will accept all the information the next day.

>Next the system will have a popup with 'Membership Category' with 5 choices. For this purpose, the system will automatically have checked 'Active'.

>Once you have entered start date, type, and category, click on Next.

>You will need to enter the Sponsor's name which is at the top of the application. So, click on Name, then type in first and last name of sponsor and click on Next. You can also use the Sponsor's ID number as that will ensure you have the correct Lion. There will be times where you may have more than one Lion show up with the same name! The ID number will always give you the correct Lion.

>You can ask the sponsor for their ID number, but if you forget to ask, you can look in your member list and get that number.

>The system wants you to confirm the sponsor, and if correct then click on Next.

>You have successfully entered a new member! Congratulations!

>To get the new member's ID number, go to your club page. At the top of the page is a search box. Type in the member's name and his or her information page will come up. Her/his ID number will be at the top of that page. Remember to write it down on the application!

Adding or Changing your Club Executives

* Log in to the Portal using your club email and password.

* At the top of your page is your club name highlited in blue. Click on that. It will take you to your club page.

* On the Right side of your page, go to 'Manage Club Officers' and click on that.

* Click on 'Create New Assignment'. Then 'Next'.

* Next choose when Assignment begins. If there is a change in the current year, the click on 'Current Lion Year'. For your new executives for July 1st, click on 'Upcoming Lion Year'.

* Next choose the officer type so click on 'Officer'. Then title type - click on 'Official'.

* The next screen choose which officer title from the dropdown menu and then click on the name of the member in the list.

* Follow the promts to add or change address, phone number, emails, etc if it's needed.

* Alternatively, when adding your execs not on this list like 3rd VP, Immediate Past President, Lion Tamer, Tail Twister, etc, they need to be added under 'Local'. You will get the message that it's not recognized officially. That's ok. Just go ahead and click on "Officer Type", then the "Title Type" - "Local", add the name of the title then "Next". and then click on the member's name and next. You'll be asked if you want to add another, click 'Yes' if you do or 'No', and 'next'and you'll go back to the club page.

* You will do this for each member of your executive even if they are in the same position in the upcoming year.

<u>PLEASE NOTE THAT THESE NEW/RETURNING EXECUTIVES MUST BE ENTERED BEFORE JUNE 30TH!**</u>**
If you don't put them in, you will have issues getting into the portal to enter

those exeutives or any service your club does.

If that happens, then you need to contact:
    Lion Theresa Hewitt
    lionthewitt@gmail.com

Printing Lions Cards

* At the start of each Lions year, you will need to print new ID cards for each member of your club as well as new members as they are inducted.

* Log in to the portal using your email and password.

* Click on "My Club".

* Click on the tab "Club Actions".

* Click on "Get Membership Cards".

* Click on the box beside "Full Name". This will show all the current members of your club and highlite them all at once.

* Scroll to the bottom of that screen and click on "Next".

* This next screen gives you a choice of sizes of membership cards and the number per page. A4 is automatically chosen. Below is what they have in metric and I have added the standard for those who are still using that measurement.

    A4 _ 84 x 54 _ 10 per page (3 5/16" x 2 1/8")
    A4 _ 84 x 54 _ 8 per page...just a bit more space between each card
    A4 _ 91 x 55 _ 10 per page (3 9/16" x 2 3/16") - this is the one I use as it makes them just that little bit larger. Print is very small anyway.

* It will have the current date, so click on the calendar and add Jun 30, 202_. This is the format date you need to enter for the upcoming year. Then click "Next". This can be done for the club members closer to the end of June or at the beginning of July. Remember that the Lions year is from July 1st of the current year till June 30th of the following year.

* This next screen - its the print screen - will look like your cards will be huge!! Don't panic!   Just above that first card is a pale blue strip. Look for the minus (-) and plus (+) signs closer to the middle. Click on the minus till you can see the whole page. You will also see a white box with the number "1" and beside that "of 4". Using the scroll bar closest to the 2nd card will show you all the membership card on each of the four pages.

* When printing up the cards, its best if you have card or cover stock for them. Paper is ok but usually 'business' cards use those two types of stock. Your printer will print all four pages. You can also buy blank business cards that are already perforated to make it easier for you to separate them. (Staples has business cards in white or with decorations. White is best.)

* These cards will have both the names of your members, in brackets will be their membership number as well as the club name and good till the end of that particular Lions year.

* It's up to you when you give the cards to each member, but I work with the club treasurer and when the member has paid their dues, they get their new card.

* Don't forget to sign the cards on that last line!!