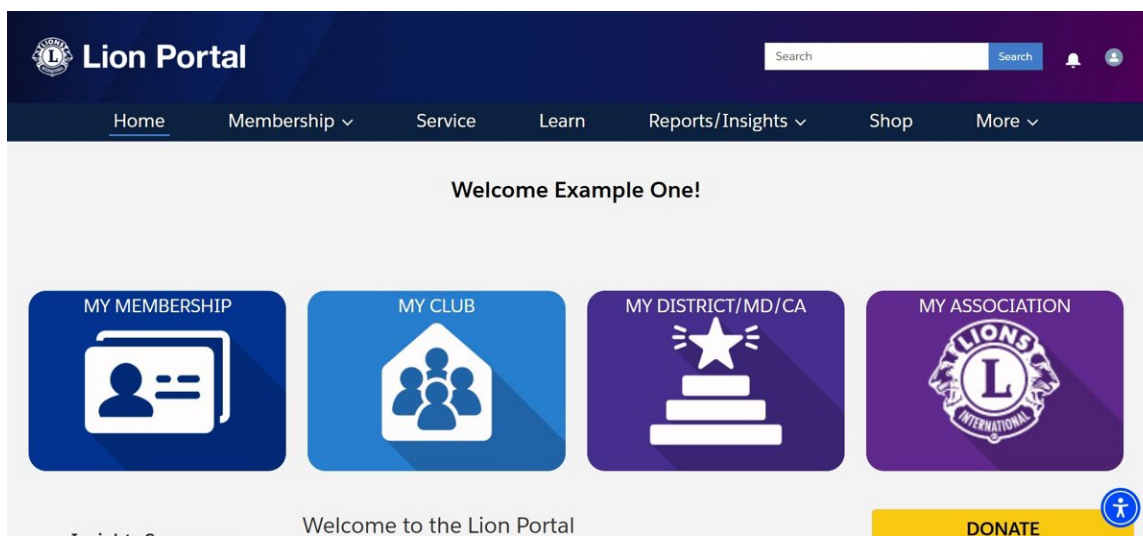


Enhanced Create and Report Service Activity Features

Introduction - This guide offers a comprehensive walkthrough of the enhanced features for creating and reporting service activities on the Lion Portal. By following the steps outlined, users can efficiently set up service activities, ensure all required data is entered, and successfully report activities to LCI, gaining insights into their contributions. Additionally, the guide addresses metrics caps and provides tips for managing and uploading images, making it an essential resource for Lions and Leo clubs looking to optimize their service reporting process.

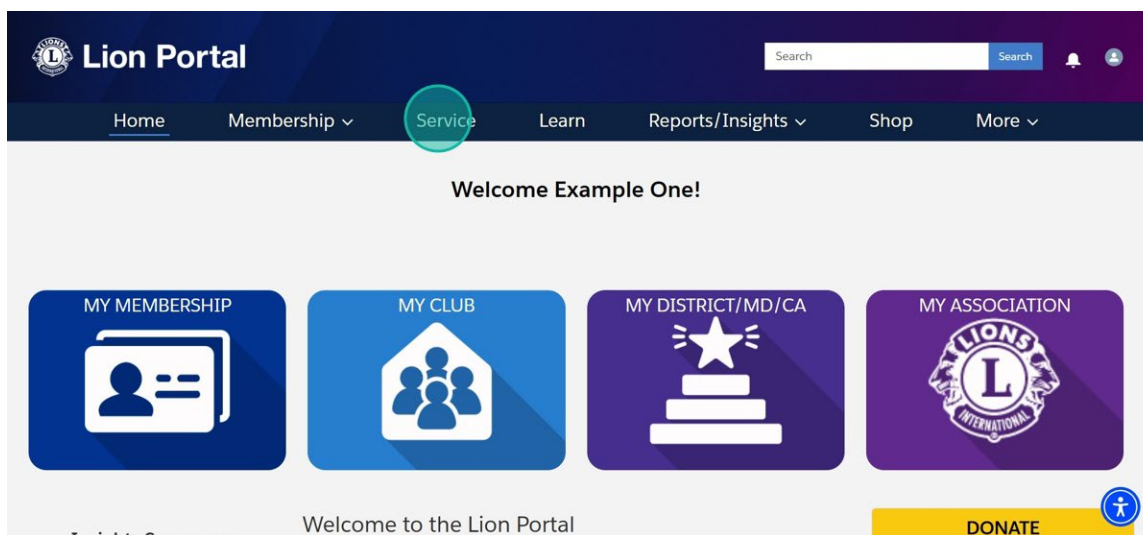
Login and Navigate To Service

1. Log into the Lion Portal at <https://lionsinternational.my.site.com/>



Enhanced Create and Report Feature Walkthrough

2. Click "Service"



Enhanced Create and Report Service Activity Features

3. Click "Create Service Activity"

The screenshot shows the Lion Portal dashboard with a navigation bar and a 'Create Service Activity' button highlighted. Below the navigation bar are five summary cards for service statistics:

- Total People Served*: 15,084
- Total Volunteers: 50,550
- Total Volunteer Hours*: 5,223
- Total Funds Donated*: \$633,873.28
- Total Funds Raised*: \$1,000,000.00

A note below the cards states: "*These values represent the capped numbers that have been reported to LCI".

Below the statistics is a table of service activities with the following columns: End D..., Title, Servic..., Start..., Repor..., Repor..., Activit..., Spons..., Servic..., Cause, and Project Type. The table shows one record for a 'Test' activity on May 5, 2025, sponsored by 'Example Lions Club For Training'.

Create The Service Activity

4. Select the activity sponsor and click "Next"

The screenshot shows a modal window for selecting an activity sponsor. The modal has two radio buttons: "Search for Leo Club, Lions Club, or District" and "Select from my specific area". The "Select from my specific area" option is selected.

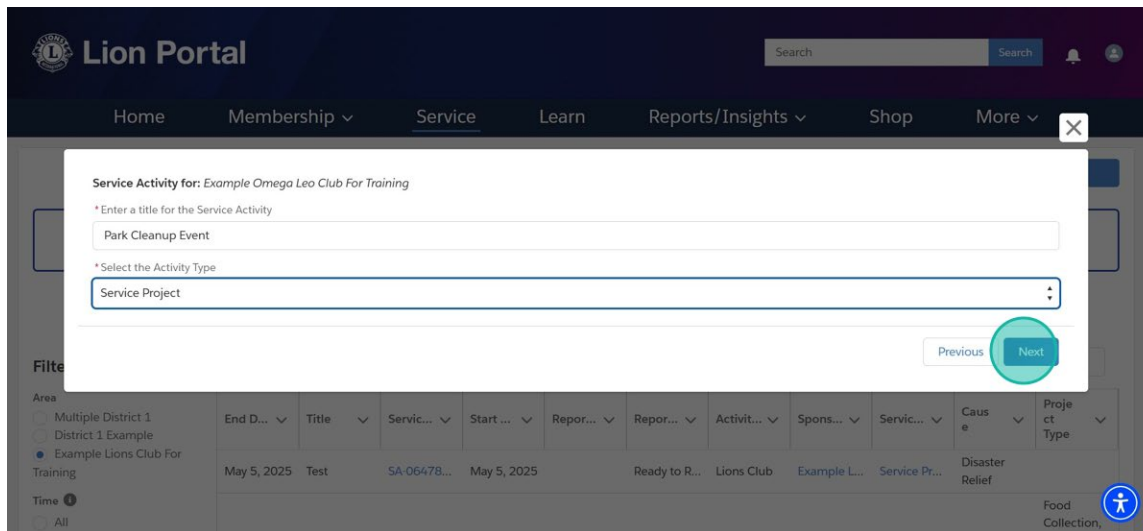
Below the radio buttons is a search bar with the text "2 of 2 items · 1 item selected" and "Search this list...". A table lists two items:

Name	Type
Example Lions Club For Training	Lions Club
Example Omega Leo Club For Training	Omega Leo Club

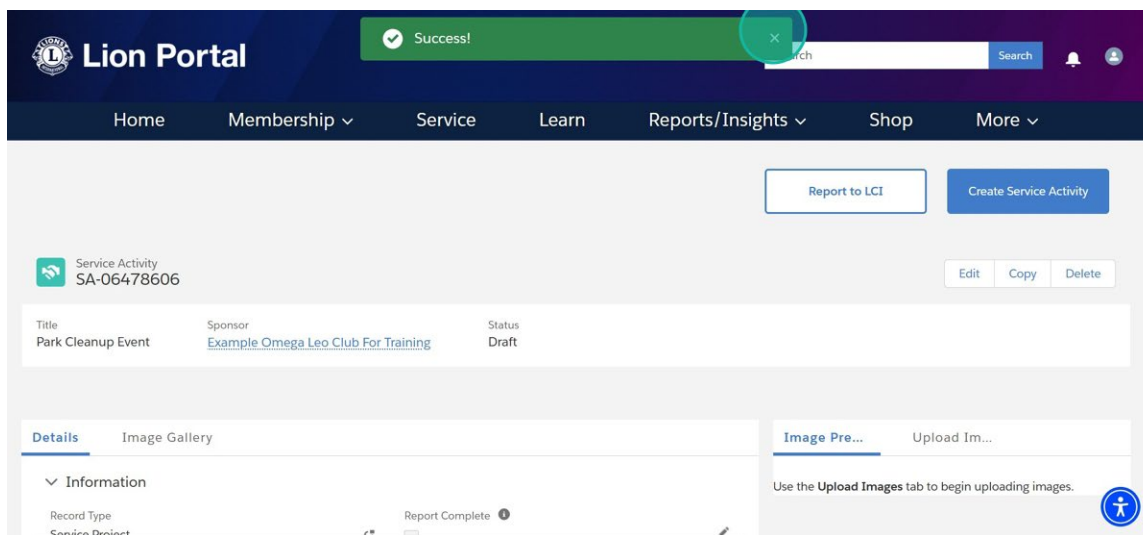
The "Example Omega Leo Club For Training" item is selected. A "Next" button is highlighted in the bottom right corner of the modal.

Enhanced Create and Report Service Activity Features

5. Enter a Title for the Activity and select the activity type then click "Next"



6. The success message is shown and your activity has been created. Click the "X" to close the message.



Enhanced Report Complete For Service Activities

Improvement! There is a new button "Report To LCI", this button when clicked will validate all required data has been entered.

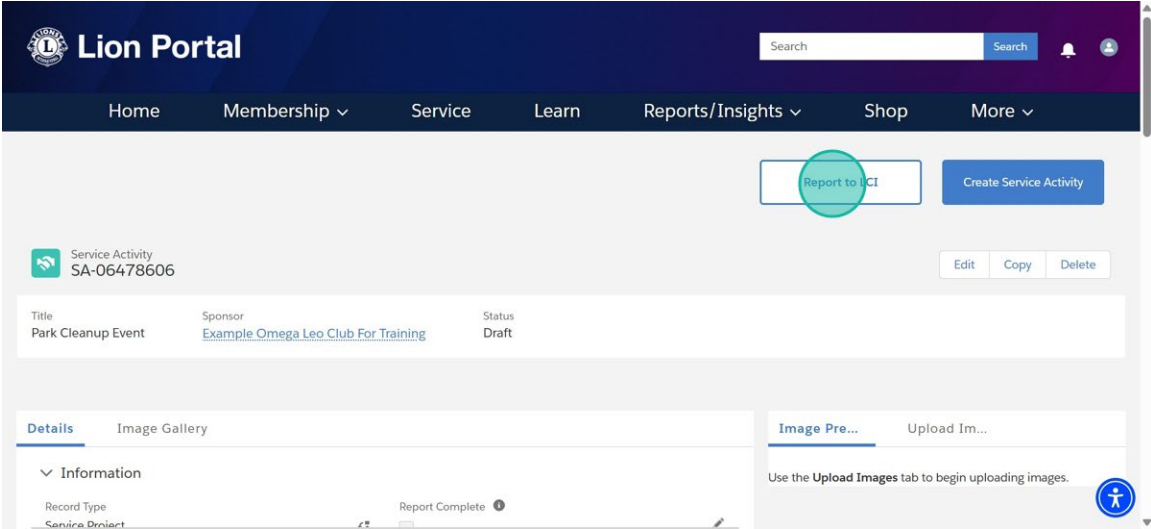
- If all data has been completed, this action will check the "Report Complete" checkbox for you and push the activity to Insights Dashboards.

Enhanced Create and Report Service Activity Features

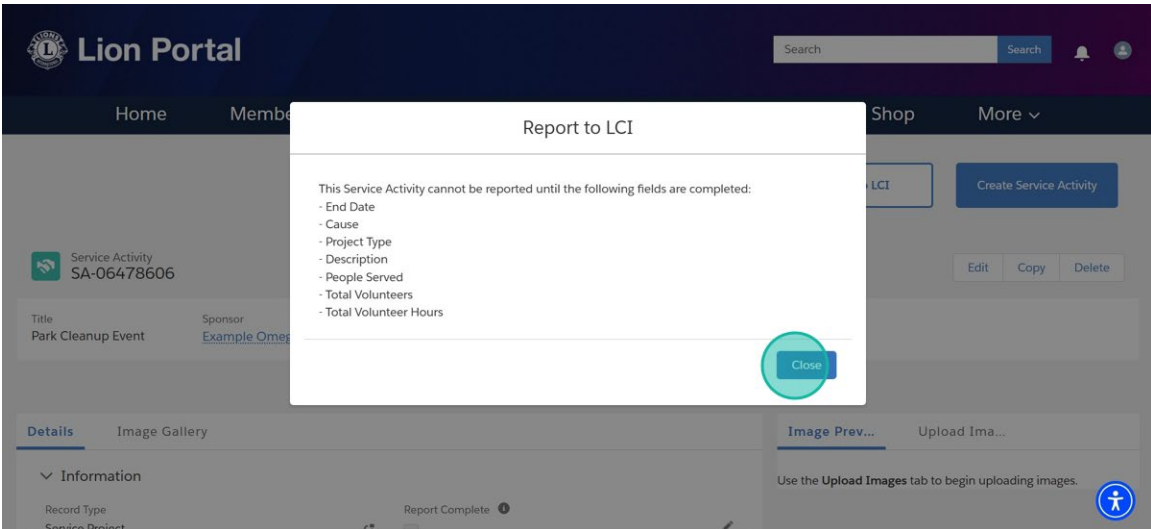
- If there is any missing data a message box will popup indicating the data that is missing. Edit the activity to input the missing data elements and save.

The steps below illustrate this enhanced work flow.

7. This is a newly created activity and is "missing" many of the required data inputs. Click "Report to LCI" to see what happens next.



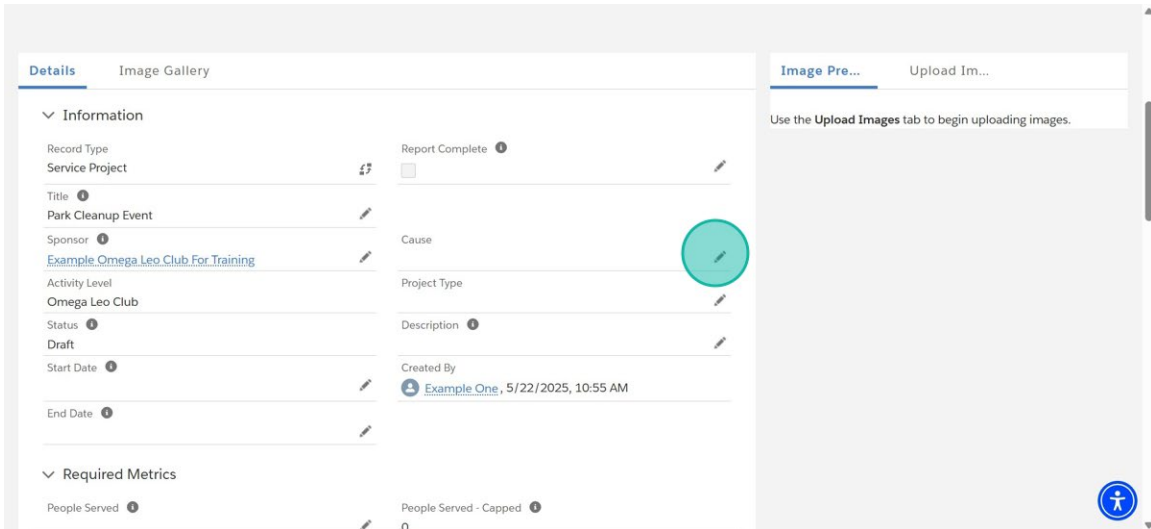
8. The popup tells you what data is needed to "report complete". Click "Close" to close the popup.



Enhanced Create and Report Service Activity Features

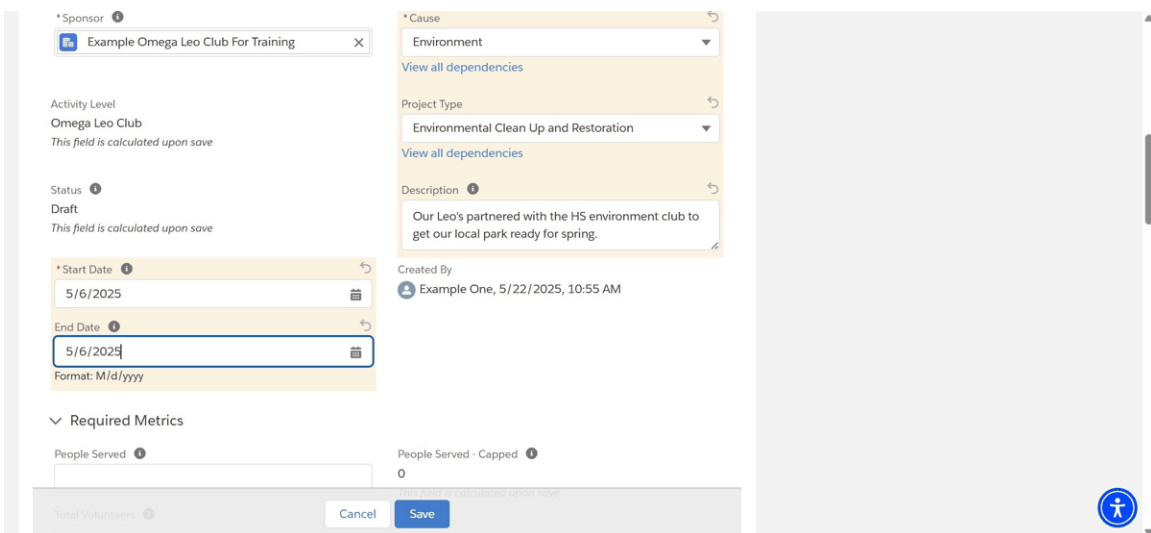
9. To get started on entering required data, click on the pencil icon for inline editing or select edit button for a popup form.

This example uses inline editing.



10. Enter the data to describe the Service Activity. To "Report Complete"/"Report To LCI" every activity requires the following:

- Cause
- Project Type
- Description
- Start Date
- End Date



Enhanced Create and Report Service Activity Features

11. Required Metrics vary by Service Activity type:

Enter the required metrics and "Save" or continue by scrolling to add additional metrics and information about the activity.

The screenshot shows a form for creating a service activity. At the top, there are date fields for 'Start Date' (5/6/2025) and 'End Date' (5/6/2025). Below this is a section for 'Required Metrics' with the following fields:

- People Served: 250
- Total Volunteers: 25
- Total Volunteer Hours: 50.00
- Non-Lions Participated:
- Non-Lion Family Members Participated:

Calculated fields on the right show 'People Served - Capped' at 0 and 'Total Volunteer Hours - Capped' at 0.00. Below the required metrics is an 'Optional Metrics' section with a 'Currency' dropdown set to 'USD - U.S. Dollar' and a 'Total Funds Raised (USD)' field. At the bottom, there are 'Cancel' and 'Save' buttons. A vertical scroll bar is visible on the right side of the form. A blue arrow points to the scroll bar with the text 'To enter additional data use the scroll bar'. Another blue arrow points to the 'Save' button with the text 'If you have entered all data for the activity click "Save"'. A blue circle with a person icon is in the bottom right corner.

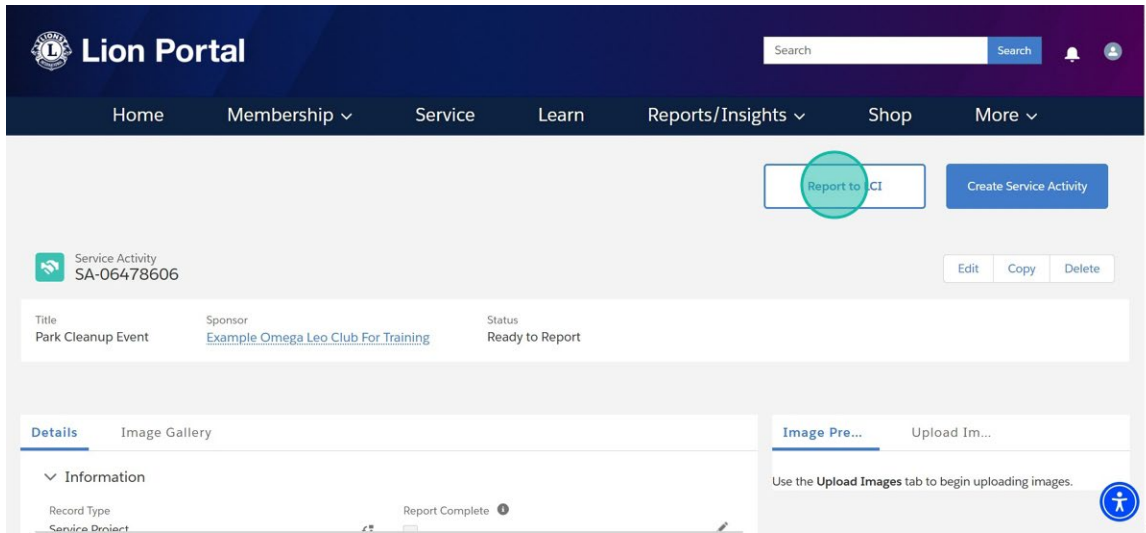
12. Optional metrics can be added. When done click "Save".

The screenshot shows the 'Optional Metrics' section of the form. It includes the following fields:

- Currency: NZD - New Zealand Dollar
- Total Funds Raised: 5,000
- Total Funds Donated: (empty)
- Organization Benefited: (empty)
- Donation to LCIF:
- Trees Planted/Cared for: (empty)

Calculated fields on the right show 'Total Funds Raised (USD)' at 0.00 and 'Total Funds Donated (USD)' at 0.00. A tooltip points to the 'Total Funds Donated (USD)' field with the text 'The total funds donated in USD for this service activity.' At the bottom, there are 'Cancel' and 'Save' buttons. A vertical scroll bar is visible on the right side of the form. A blue circle with a person icon is in the bottom right corner.

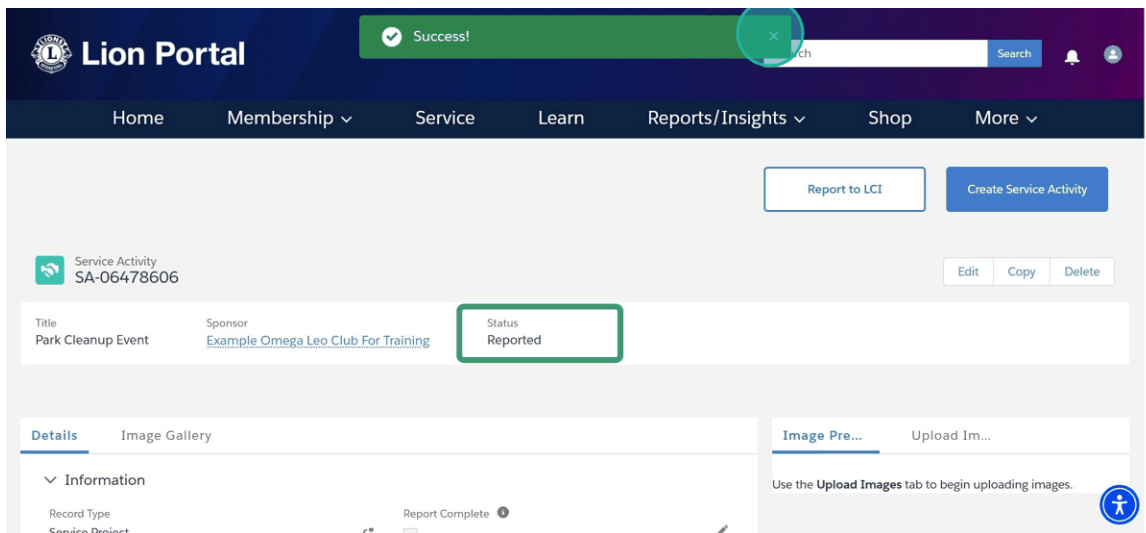
13. All required data has been entered for the activity. Click "Report to LCI".



14. There was no missing data this time. A green "Success" message is displayed to confirm this has successfully been marked "Report Complete" .

Click the "X" to close the message.

NOTE: The status has been updated to "Reported"

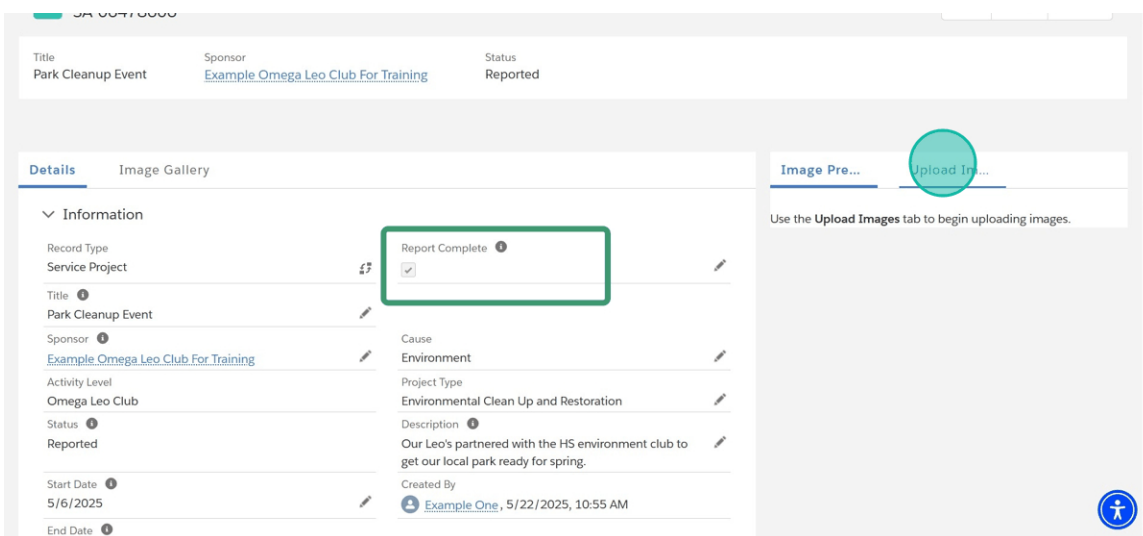


Enhanced Create and Report Service Activity Features

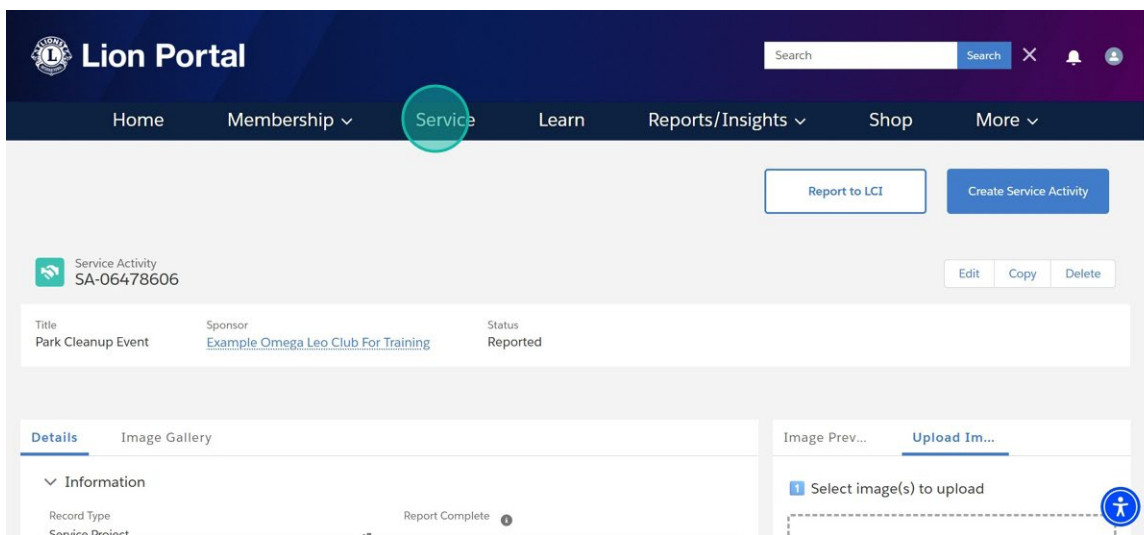
15. The "Report Complete" box is now checked.

Do not forget to add images to the service activity. Also invite others to add images. Images can be added by any member of the sponsoring organization at any time. Click "Upload Images" to get started.

*The Quick Guide: **Service Activities - Upload, View, Manage Images** provides step-by-step instructions.*



16. Click "Service" to return to the summary Service Activities page.



Enhanced Create and Report Service Activity Features

Filter The Service Activity List To View The Activity

17. This activity was done by the Leo club we sponsor. Click "Leo Club" in the Sponsor filter option to see the Leo activities.

*These values represent the capped numbers that have been reported to LCI

Filters

Area

- Multiple District 1
- District 1 Example
- Example Lions Club For Training

Time

- All
- Current Fiscal Year

Sponsor

- All
- Lion Club
- Leo Club

Service Activity Type

- All
- Donation
- Fundraiser
- Meeting
- Service Project

Cause

- All

Total (17)

Records per Page

End D...	Title	Servic...	Start ...	Repor...	Repor...	Activit...	Spons...	Servic...
May 5, 2025	Test	SA-06478...	May 5, 2025		Ready to R...	Lions Club	Example L...	Service Pr...
May 5, 2025	Food Pant...	SA-06478...	May 5, 2025	✓	Reported	Lions Club	Example L...	Service Pr...
May 1, 2025	Test	SA-06478...	May 1, 2025	✓	Reported	Lions Club	Example L...	Service Pr...
May 1, 2025	Title	SA-06478...	May 1, 2025		Ready to R...	Lions Club	Example L...	Service Pr...
May 1, 2025	Title	SA-06478...	May 1, 2025	✓	Reported	Lions Club	Example L...	Service Pr...

18. The newly added and reported complete activity is shown.

*These values represent the capped numbers that have been reported to LCI

Filters

Area

- Multiple District 1
- District 1 Example
- Example Lions Club For Training

Time

- All
- Current Fiscal Year

Sponsor

- All
- Lion Club
- Leo Club

Service Activity Type

- All
- Donation
- Fundraiser
- Meeting
- Service Project

Cause

- All

Total (3)

Records per Page

End D...	Title	Servic...	Start ...	Repor...	Repor...	Activit...	Spons...	Servic...	Caus e	Proje ct Type
May 6, 2025	Park Clean...	SA-06478...	May 6, 2025	✓	Reported	Omega Le...	Example ...	Service Pr...	Environmen t	Environmen tal Clean Up and Restoration
Mar 15, 2...	Leo Club F...	SA-06478...	Mar 15, 2...		Ready to R...	Omega Le...	Example ...	Fundraiser	Environmen t	Environmen tal Clean Up and Restoration
Jan 21, 20...	Leo Servic...	SA-06478...	Jan 21, 20...	✓	Reported	Omega Le...	Example ...	Service Pr...	Other Humanitari an Service	Initiatives for the Elderly

Showing Page 1 of 1 Pages

Enhanced Create and Report Service Activity Features

Understanding Metric Caps

Understanding metrics that have limits at the **club** level. Activities performed by Lions and Leo Clubs are capped when reported to Insights. Your original data is maintained. A new display field shows what will be reported to Insights. The capped metrics are:

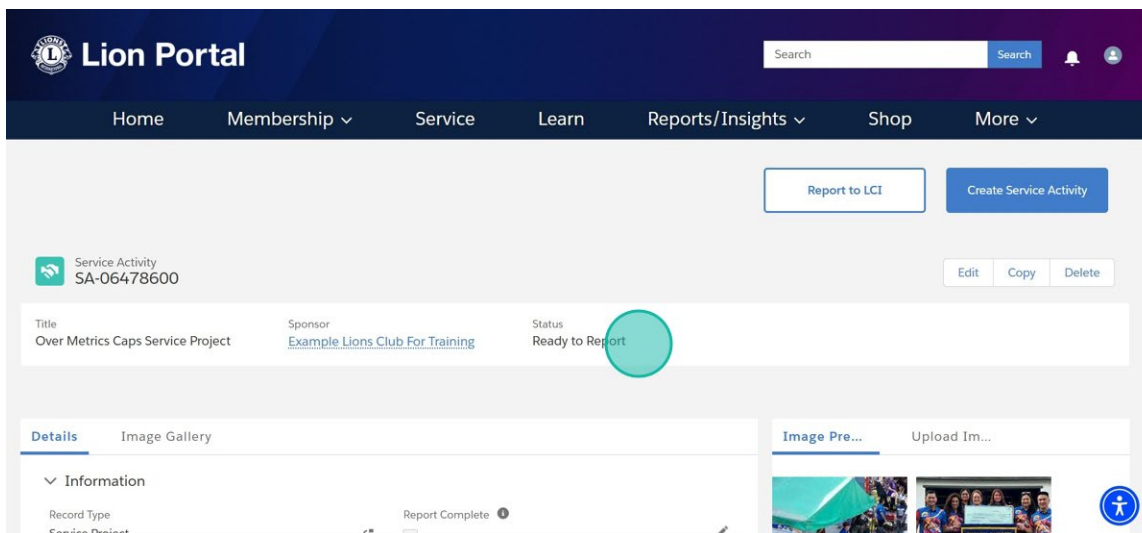
- People Served limit of 3000
- Volunteer Hours limit of 1200
- Funds Raised limit of \$250000 (USD)
- Funds Donated limit of \$200000 (USD)

19. Click the link to navigate to the service activity details

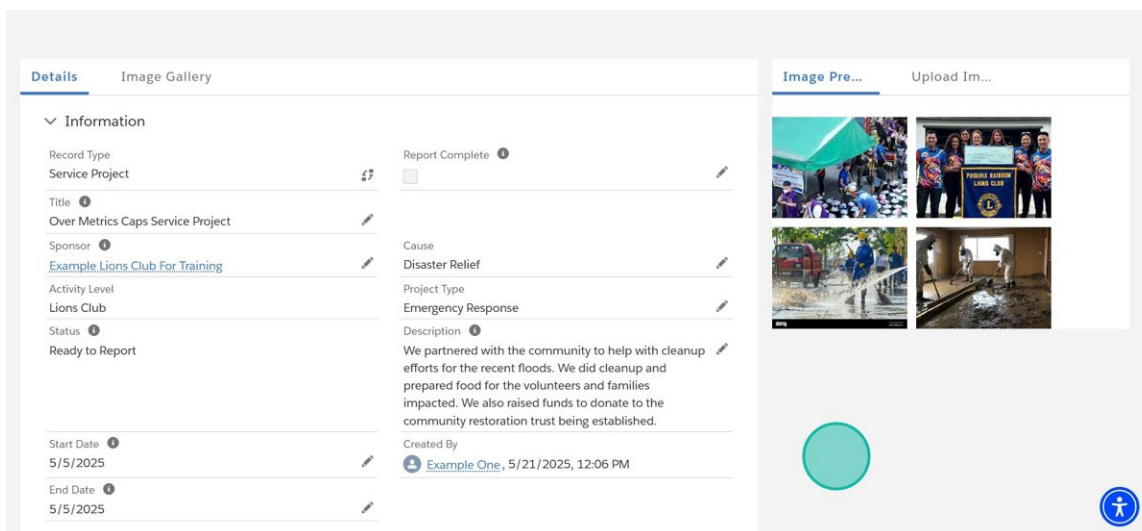
The screenshot shows the Lion Portal interface. At the top, there is a navigation bar with 'Lion Portal' logo, a search bar, and navigation links: Home, Membership, Service (selected), Learn, Reports/Insights, Shop, and More. Below the navigation bar, there are five summary cards for metrics: Total People Served* (18,084), Total Volunteers (50,670), Total Volunteer Hours* (6,423), Total Funds Donated* (\$833,873.28), and Total Funds Raised* (\$1,250,000.00). A note below these cards states: '*These values represent the capped numbers that have been reported to LCI'. Below the metrics, there is a 'Filters' section on the left with radio buttons for 'Area' (Multiple District 1, District 1 Example, Example Lions Club For Training) and 'Time' (All). The main content area shows a table of service activities with columns: End D..., Title, Servic..., Start ..., Repor..., Repor..., Activit..., Spons..., Servic..., Caus e, and Proje ct Type. The first row of data shows: May 5, 2025, Over Metri..., SA-06473..., May 5, 2025, Ready to R..., Lions Club, Example L..., Service Pr..., Disaster Relief, and Emergency Response. A blue circle highlights the 'SA-06473...' value in the 'Servic...' column. A 'Create Service Activity' button is located at the top right of the main content area.

Enhanced Create and Report Service Activity Features

20. The detail of the activity is shown. This activity is a "Status" of "Ready To Report."



21. Scroll down to review the activity details.



22. For this club level activity the "People Served" and "Total Volunteer Hours" entered are above the limit for a club level activity. New fields have been added to show the metrics that will be reflected in Insights dashboards.

Enhanced Create and Report Service Activity Features

Example One, 5/21/2025, 12:06 PM

End Date 5/5/2025

Required Metrics

People Served	4,500	People Served - Capped	3,000
Total Volunteers	120	Total Volunteer Hours - Capped	1,200.00
Total Volunteer Hours	7,000.00		
Non-Lions Participated	<input checked="" type="checkbox"/>		
Non-Lion Family Members Participated	<input checked="" type="checkbox"/>		

Optional Metrics

Currency	NZD - New Zealand Dollar	Total Funds Raised (USD)	328,203.22
Total Funds Raised	NZD 550,000.00	Total Funds Raised (USD) - Capped	250,000.00
Total Funds Donated	NZD 50,000,000.00	Total Funds Donated (USD)	29,836,656.24
Organization Benefited		Total Funds Donated (USD) - Capped	

NEW! Capped fields are shown of what will be reported in Insights

23. For this club level activity the currency chosen was New Zealand Dollar. The "Funds Raised" and "Funds Donated" values entered are converted to USD as of the "End Date" of the activity. Shown with the arrows. When converted to USD the "Funds Raised" and "Funds Donated" are over the USD limits. New fields have been added to show the metrics that will be reflected in Insights dashboards.

Required Metrics

People Served	4,500	People Served - Capped	3,000
Total Volunteers	120		
Total Volunteer Hours	7,000.00	Total Volunteer Hours - Capped	1,200.00
Non-Lions Participated	<input checked="" type="checkbox"/>		
Non-Lion Family Members Participated	<input checked="" type="checkbox"/>		

Optional Metrics

Currency	NZD - New Zealand Dollar	Total Funds Raised (USD)	328,203.22
Total Funds Raised	NZD 550,000.00	Total Funds Raised (USD) - Capped	250,000.00
Total Funds Donated	NZD 50,000,000.00	Total Funds Donated (USD)	29,836,656.24
Organization Benefited		Total Funds Donated (USD) - Capped	200,000.00
Community Helping Hands			
Donation to LCIF	<input type="checkbox"/>		

Enhanced Create and Report Service Activity Features

24. Service Activities with metrics over the cap limits CAN BE REPORTED COMPLETE/REPORT TO LCI. The metrics reflected on Insights dashboards will reflect the maximum value allowed.

The screenshot shows a form with two sections: 'Required Metrics' and 'Optional Metrics'. Each metric has a current value and a 'Capped' value. Green arrows point from the capped values to a callout box that says 'Values reflected in Insights for this activity'.

Metric	Current Value	Capped Value
People Served	4,500	3,000
Total Volunteers	120	-
Total Volunteer Hours	7,000.00	1,200.00
Non-Lions Participated	<input checked="" type="checkbox"/>	-
Non-Lion Family Members Participated	<input checked="" type="checkbox"/>	-
Currency	NZD - New Zealand Dollar	-
Total Funds Raised (USD)	NZD 550,000.00	328,203.22
Total Funds Raised (USD) - Capped	-	250,000.00
Total Funds Donated (USD)	NZD 50,000,000.00	29,836,656.24
Total Funds Donated (USD) - Capped	-	200,000.00

25. To update the metric values, click the pencil icon or choose "edit", enter the new values and click "Save"

The screenshot shows the same form as above, but with the 'Save' button highlighted in a green circle. The 'Total Funds Raised' and 'Total Funds Donated' fields are highlighted in yellow, indicating they have been updated.

Metric	Current Value	Capped Value
People Served	4,500	3,000
Total Volunteers	120	-
Total Volunteer Hours	7,000.00	1,200.00
Non-Lions Participated	<input checked="" type="checkbox"/>	-
Non-Lion Family Members Participated	<input checked="" type="checkbox"/>	-
Currency	NZD - New Zealand Dollar	-
Total Funds Raised (USD)	5,500	328,203.22
Total Funds Raised (USD) - Capped	-	250,000.00
Total Funds Donated (USD)	5000	29,836,656.24
Total Funds Donated (USD) - Capped	-	200,000.00

26. Upon saving, the converted dollars are updated and the capped fields now show the new values that will be reflected in Insights dashboards. In this example the values are not over the cap limit and show as reported.

Enhanced Create and Report Service Activity Features

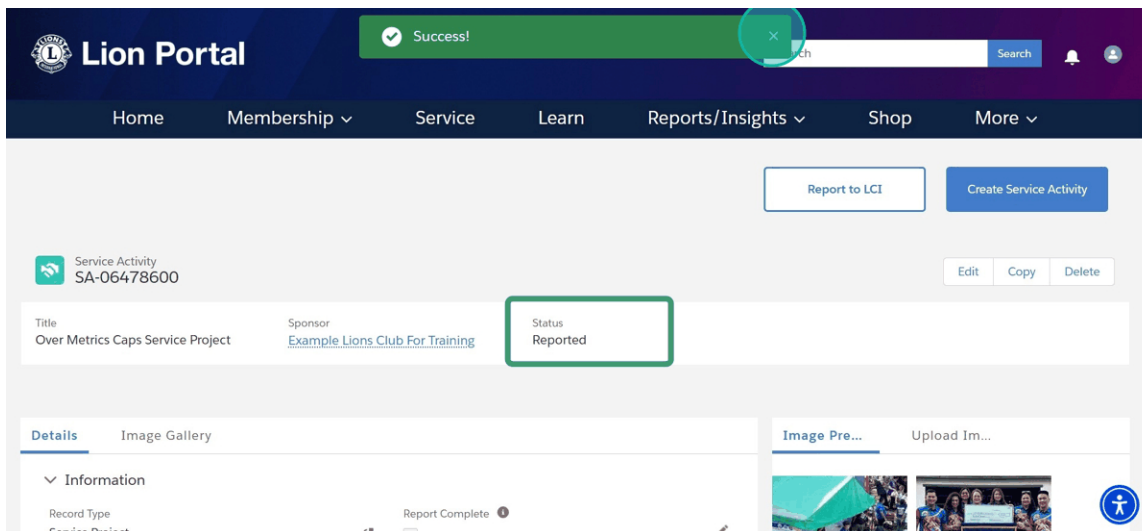
The screenshot shows a form for reporting service activity. It includes sections for 'Optional Metrics' and 'Additional Details'. The 'Optional Metrics' section contains fields for Currency (NZD - New Zealand Dollar), Total Funds Raised (USD) (3,282.03), Total Funds Raised (USD) - Capped (3,282.03), Total Funds Donated (USD) (2,983.67), and Total Funds Donated (USD) - Capped (2,983.67). The 'Additional Details' section includes Signature Activity (checked). A callout box with green arrows pointing to the 'Total Funds Raised (USD) - Capped' and 'Total Funds Donated (USD) - Capped' fields contains the text: "New values are not over the cap limit and show as entered".

27. Click "Report to LCI" button to mark "Report Complete"

The screenshot shows the Lion Portal interface. At the top, there is a search bar and navigation tabs: Home, Membership, Service, Learn, Reports/Insights, Shop, and More. Below the navigation, there are two buttons: "Report to LCI" (circled in green) and "Create Service Activity". Below these buttons, there is a service activity card for "SA-06478600". The card displays the title "Over Metrics Caps Service Project", the sponsor "Example Lions Club For Training", and the status "Ready to Report". Below the card, there are tabs for "Details" and "Image Gallery". The "Details" tab is active, showing an "Information" section with a "Report Complete" checkbox. To the right of the "Details" tab, there is an "Image Gallery" section with "Image Pre..." and "Upload Im..." options, and two image thumbnails.

Enhanced Create and Report Service Activity Features

28. A green "Success" message is displayed, click the "x" to close the message. Note the activity "Status" is now showing "Reported".



29. This concludes the "Service Activities - Enhanced Create and Report Service Activity Features" Quick Guide

