UNITED GRAND LODGE OF ENGLAND

HERMES TRANSITION AND ROLLOUT
DATA INITIATION GUIDE

OCTOBER 2020

1. INTRODUCTION

The term 'Data Initiation' refers to the phase when a Lodge or Chapter first has access to Hermes. It is the time when the user must ensure the details of his unit and members agrees with those held within Adelphi/Hermes.

At this point in the transition to Hermes, the user has been provided with a Hermes login and has previously received the Hermes training package and will therefore be somewhat familiar with the Hermes screens. It is proposed that each Hermes user receives by email, a 'User Transition Guide' that will help the user through the stages of transition. The content of the guide will be defined by the T&R Working Group, which is scheduled for release next year. This document will emanate from the local governance for the Lodge or Chapter, be it **Metropolitan**, **a Province**, **a District**, **an Inspectorate** or UGLE where the unit is independent. The abbreviation MPDI is used in the remainder of this document to refer to these groupings.

While the full contents of the guide are yet to be defined, it will at least contain a checklist of the tasks required to be completed during the Data Initiation phase. This document lists the categories and fields of data to be checked during the data initiation phase and the action to be taken where differences are identified.

2. LODGE/CHAPTER DETAILS

The details of the Lodge or Chapter as held by Adelphi will be made available to view using Hermes screens. These are not currently included in the Wireframe but will be provided within Hermes. The Hermes user will not have the ability to correct any errors in these details but must report them back to the MPDI.

The details to be checked, grouped by the appropriate Hermes screen, are proposed as follows:

Home Page/Dashboard
◆ Lodge/Chapter Number
◆ Lodge/Chapter Name

Lodge Management
◆ Consecration Date
◆ Subscription Month
◆ Installation Month
◆ Meeting Place
◆ Meeting formula and upcoming meeting dates
◆ WM/MEZ Name
◆ Secretary/Scribe E Name
◆ Treasurer Name
◆ Almoner Name
◆ Charity Steward Name

3. MEMBER LIST AND PERSONAL DETAILS

The details in this section can all be checked using the various Hermes screens. The 'Lodge Membership' screen allows subscribing or honorary members to be listed for checking. The form also allows an individual member to be selected, viewed and modified if necessary, using the Hermes 'Member Personal Details' screen. The following details are proposed to be checked:
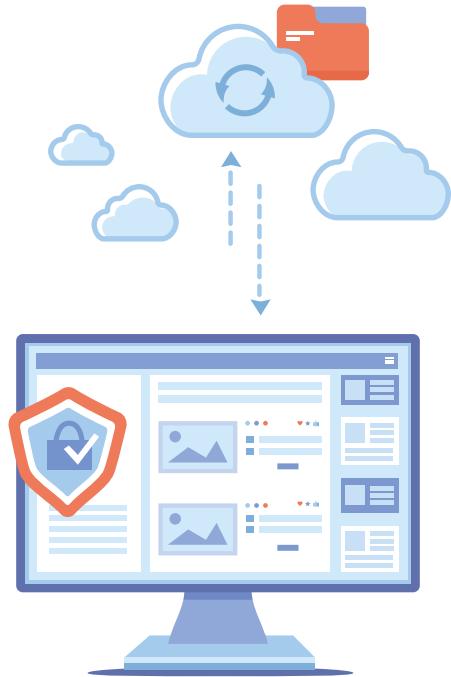
FIELD	ACTION TAKEN TO CORRECT
First Names	Inform MPDI
Family name	Inform MPDI
Familiar name	Use Hermes to correct it
Preferred name	Use Hermes to enter or correct it except for Grand Officers when MPDI should be informed
Primary email address	Use Hermes to correct it
Primary Contact Number	Use Hermes to correct it
Secondary Contact Number	Use Hermes to correct it
Primary Residential Address	Use Hermes to correct it
Employer Name	Use Hermes to enter or correct it
Profession/Occupation	Use Hermes to enter or correct it – inc Retired
Industry Sector	Use Hermes to enter it
Photograph	Use Hermes to upload it

4. MEMBER MASONIC DETAILS

It is also proposed to prompt Hermes users to check that the masonic details of each member (including foreign joiners) are correct and ensure that all paperwork previously submitted has been correctly recorded in Hermes. The 'Member Masonic Details' screen can be used to confirm this. Any discrepancies should be reported to MPDI and cannot be entered by the Hermes user. The name of the Grand Lodge/Chapter should be included if the ceremony was not carried out under the jurisdiction of UGLE.

The following fields should be checked in a Craft Lodge:

◆ Member's status as a subscribing or honorary member (showing whether past subscribing or never subscribing)

◆ Missing date of birth

◆ Missing Initiation, Passing or Raising date

◆ Missing GL Certificate Number

◆ Missing GLC Presented Date

The following fields should be checked in a Royal Arch Chapter:

◆ Member's status as a subscribing or honorary member (showing whether past subscribing or never subscribing)

◆ Missing Exaltation date

◆ Missing SGC Certificate Number

◆ Missing SGCC Presented Date

5. OFFICER HISTORY

The Hermes Agenda Creation process will use the history of offices held by members of the unit, to establish who are qualified for higher office. This history has been created in past years by using the UGLE/MPDI Installation Return. A rule has been in place in Adelphi to check history for the appointment of a WM, so this history is available. No similar rule was in place for the appointment of a Royal Arch 3rd Principal,

so the availability of the appropriate history is not guaranteed to be present.

The use of the Installation Return has depended on the procedures in use by the MPDI. During the data initiation phase the MPDI will therefore be able to advise Hermes users on the extent to which the history must be created.

Where necessary, the history for recent years is examined using the Hermes

'Historical Installation Return' and missing years and officers can be completed. It is recommended that all Secretaries and ScribesE go back as far as they are reasonably able, at least 5 years. They should populate the oldest Installation Return first and then work forwards, reappointing, promoting and where necessary populating all Lodge/Chapter officers up to the current year, where these are not already listed.

Month

Su	Mo	Tu	We	Th	Fr	Sa
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
28	29	30	31			