



UNITED GRAND LODGE  
OF ENGLAND

# HERMES TRANSITION AND ROLLOUT

## Hermes – An Introduction For Secretaries And ScribesE

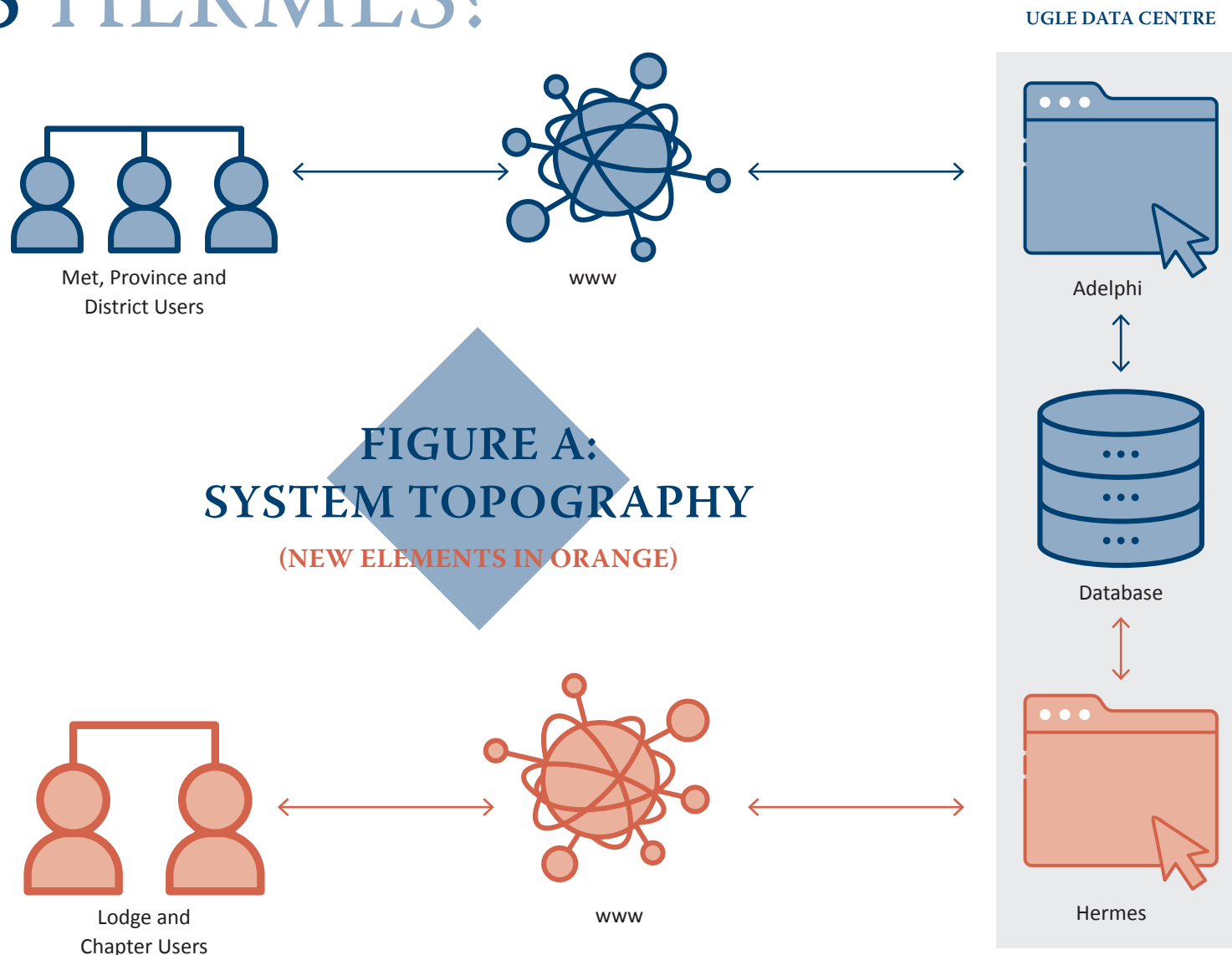


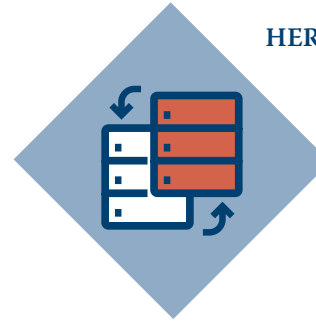
DECEMBER 2020

# WHAT IS HERMES?

Designed specifically for use by Lodge Secretaries/Chapter ScribesE (Sec/SE), Hermes is a new web-based application that will allow you to manage many of your administrative processes electronically and reduce the number of physical forms to be completed. Once logged in to Hermes, you will be able to see all of the data pertaining to your Lodge/Chapter. If you are the Sec/SE for another unit, you will be provided a separate login.

The data managed in Hermes will be held in the Adelphi database and also shown in the Adelphi web application, which is used by Metropolitan, Provinces, Districts and UGLE/SGC. The diagram below illustrates how Hermes and ADelphi will share a database, but are maintained by different users. The database is located at UGLE's data centre at Great Queen Street.





# WHY HERMES?

Moving away from paper is something UGLE has wanted to do for some time and managing workflows online provides the following benefits for a Sec/SE:

## ◆ IMPROVED DATA QUALITY

When collecting information using paper forms, there is always the possibility of incomplete, inaccurate or illegible entries. With Hermes, all information is checked at the time of entry, ensuring it is both accurate and complete.

## ◆ INCREASED EFFICIENCY

The Sec/SE is responsible for the management of Registration Forms, applications for Grand Lodge Certificates, Installation and Annual Returns, which have to be downloaded, printed, signed and then submitted. Distributing and returning paper forms are tasks that make the job time consuming, creating barriers when there are queries. Hermes will allow all of these tasks to be managed online in one location. Users will be able to complete and submit their forms without complications within the application. Data will be kept in one place and the need for physical storage space for paper records will be reduced significantly.

## ◆ REAL TIME DATA SHARING BETWEEN UNITS

Hermes will allow the update of member information by the Sec/SE, with any changes immediately showing in all other units of which he is a member.

## ◆ BETTER DATA ACCESS

The ability to view and analyse data has previously only been available to Metropolitan, Provincial and District Offices and the United Grand Lodge of England via ADelphi. Hermes will allow this data to be available to you the Sec/SE (those who are closest to our members), providing access to data insights and analysis that will give a better understanding of how your Lodge or Chapter is performing.

## ◆ GREATER SECURITY

Keeping member data safe is imperative. Hermes will improve information security and ensure we meet modern industry compliance guidelines.





# WHAT WILL HERMES DO?

Hermes will support the Sec/SE in four key areas: Membership, Journey, Finance and Analytic

## ◆ MEMBERSHIP FUNCTIONS

- ◇ View, edit and update selected personal member details such as contact details and addresses.
- ◇ Extract and download a list of member contact details such as email addresses.
- ◇ Update membership statuses; Resigned, Cessation (Rule 148/Reg 71), Deceased as well as Exclusion (Rule 181) and Elected to Honorary Membership
- ◇ Complete and submit Installation Returns online after the meeting.

## ◆ JOURNEY FUNCTIONS

- ◇ Capture an “Enquirer”, “Prospect” or “Candidate” using a new online Registration process. This will apply to a new member or an existing member joining a Lodge or Chapter.
- ◇ Removes the need for Clearance Certificates. These will be replaced by a new digital process. Members will authorise the access and transfer of their information when joining a new unit.
- ◇ Automatically order Grand Lodge Certificates when a member is Raised, populating all required information and transmitting to UGLE to enable this to be generated, printed and posted out. The same process will apply for generating a SGC Certificate following recording an Exaltation (Note: for Districts these will be sent to the District Office for signing).

## ◆ FINANCE FUNCTIONS

- ◇ Annual Returns will be reviewed by the Sec/SE before he submits the Annual Return for approval by the Treasurer. The Annual Return will detail the amounts payable to UGLE/SGC as well as Metropolitan, Province or District.

- ◇ Payment of the Annual Dues to UGLE/SGC and Metropolitan, Province or District will continue to be payable via online bank transfer or cheque. (Note: District Lodges will pay UGLE dues to their District)
- ◇ Rather than being paid throughout the year, all charges from UGLE will be added to the Annual Return. These will include Registration Fees and Dispensation Fees thus reducing the administration overhead of payment processing on both the Lodge/Chapter and UGLE/SGC.

## ◆ ANALYTIC FUNCTIONS

- ◇ Register attendance at meetings and flag to the Almoner those not attending for more than a defined number of meetings.
- ◇ Record Lodge/Chapter contributions to specific charitable causes.
- ◇ Automatically notify “Resignation/Retrieval” Teams when the status of a member is changed to “Resigned”.
- ◇ Record participation in ceremony and will assist in any recommendations for first appointments or promotions.

## ◆ ADDITIONAL FUNCTIONS

- ◇ A new meeting agenda tool will enable the creation of specific agenda items to ensure compliance with the Book of Constitutions. It will allow these items to be copied and pasted into the individual Lodge/Chapter summons.
- ◇ A Post Meeting Report will validate ceremonies taking place, thus moving the member on his journey from Entered Apprentice to Worshipful Master and Exalte to First Principal.
- ◇ Requests for the more common Dispensations will be processed within Hermes. Upon approval, Dispensations can be emailed as attachments and downloaded, if required, to be read out in a meeting.

# WHAT TRAINING AND SUPPORT WILL BE AVAILABLE?

UGLE will provide a comprehensive training package to Metropolitan, Provinces and Districts who will utilise this content to distribute to Secs/SEs in preparation for their 'Go Live' with Hermes.

This training package will include Written Guides,

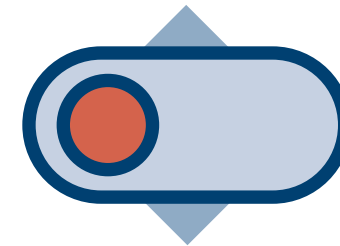
FAQs, Video Guides, E-Learning Content, Webinars and a Hermes "Sandbox", an online tool to gain experience and practice using Hermes. The training content will also be included in a Help System within Hermes, meaning that it will always be readily available to provide

on-going guidance to the Sec/SE and their successors. Support will be available through Metropolitan/Provincial/District Support Teams. Further details on Hermes Training and Support will be provided closer to launch.

# WHEN WILL HERMES GO LIVE?

The launch date of Hermes is currently planned for the second half of 2021.

Following extensive user testing by the Pilot Regions, Hermes will be rolled out by Province and District once their Sec/SE have been appropriately trained, prepared and confirmed as ready. Due to the scale of Metropolitan (London), it is expected that there will be a phased group roll out.



# HOW TO PREPARE FOR HERMES?

In preparation for using Hermes, the Sec/SE should ensure they have access to a computer/laptop with a stable and secure connection to the internet.

With increased communication via

email, an email address is essential for a Sec/SE, as these will be required by Hermes for various notifications.

Our general guidance on the recommended requirements would be;

◆ **Operating System** – a supported version of Windows, Mac or Chrome OS

◆ **Web Browser** – a supported web browser from Microsoft,

Apple or Google

◆ **Internet Connection** – a broadband connection (2 Mbps download/1Mbps upload)

◆ **Hardware** – minimum of 4GB RAM

