UNITED GRAND LODGE
OF ENGLAND

HERMES TRANSITION AND ROLLOUT
TRANSITION GUIDE

HERMES

OCTOBER 2020

1. INTRODUCTION

Hermes is a web application specifically designed for all Lodges and Chapters under the jurisdiction of the United Grand Lodge of England and Supreme Grand Chapter. The application makes the best use of technology to handle all the administrative needs of these masonic units, eliminating the need for most paper forms. A system for Lodges and Chapters truly fit for the twenty-first century.

Almost all of these masonic units are themselves part of **Metropolitan (London), a Province, a District or Inspectorate** overseas and it is these MPDI groupings through which the transition to Hermes will be planned and organised. All the Lodges and Chapters in an individual MPDI will transition to Hermes at the same time (Metropolitan may be a staggered transition due to the large number of units).

The Transition and Rollout Working Party (T&RWP) has been created to plan the implementation phase of Hermes. This document has been created by the T&RWP to explain the part the MPDI will play in the planning, organisation and transition to Hermes. It describes the various phases of the transition and the changes required in the MPDI to gain maximum benefit. In due course an equivalent document will be provided for Hermes users.

ADELPHI

Figure A shows how Hermes will interact with Adelphi. The Adelphi system will continue to be the primary system used by MPDI's and by UGLE staff, with the database remaining in the UGLE data centre at Great Queen Street. The introduction of Hermes will mean that Adelphi itself will undergo an upgrade to accommodate the new processes introduced in Hermes. This upgrade work is being carried out by the UGLE Adelphi Development team. As with all Adelphi upgrades, when that upgrade is released, it will apply to all MPDIs at once. Lodges and Chapters will have no access to Adelphi.

HERMES

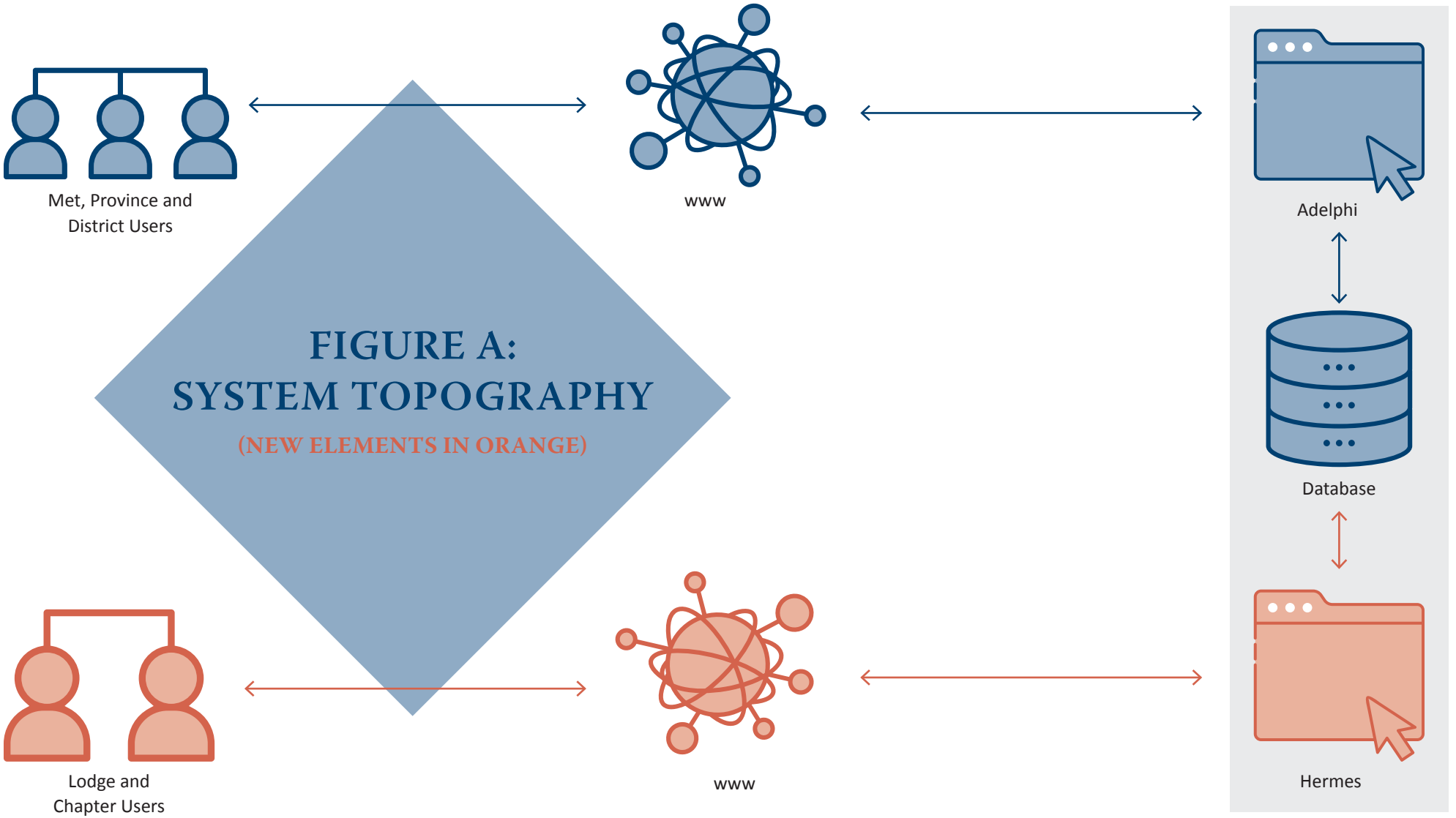
Hermes is a completely new web-based interface, designed especially for use by Lodge Secretaries and Chapter Scribes Ezra and will allow them to manage their processes electronically and eliminate the need for most paper-based forms. Once the user has logged in to Hermes, the data being displayed and available for update, will be restricted to that pertaining to the particular Lodge or Chapter. The data it will read and write will be held in the Adelphi database. So, while the look and functionality of Adelphi and Hermes are very different, the data used is exactly the same.

Hermes is being developed by an external software development company, Inoapps Ltd, who are specialists in this type of project and are a fully accredited Oracle Platinum partner who were successful in the tendering process. They are working to a specification created internally and shared and approved by all MPDIs.

As Hermes only operates on a single Lodge or Chapter, UGLE, SGC and MPDIs will have no reason to access Hermes, except for resolving any difficulties that might arise.

FIGURE A: SYSTEM TOPOGRAPHY

(NEW ELEMENTS IN ORANGE)



2. MPDI PLANNING

All MPDIs are different and the plan to transition to Hermes will therefore vary from one to another. However, the transition to Hermes will affect most aspects of the organisation of an MPDI and it is essential that the Executive are fully involved in the planning.

It is recommended that the MPDI forms a steering group and the following are suggested members of that team:

- A senior member of the Craft or Royal Arch MPDI Executive (e.g. APGM) to act as chair and to report directly to the Executive.
- The Secretary and the Scribe E of the MPDI, one of which to act as the group secretary. All communication regarding Adelphi and Hermes will be routed to the Secretary and Scribe E of the MPDI.

- A member of the MPDI with a good knowledge of Adelphi (perhaps the Adelphi Primary Point of Contact) who will be nominated as the Hermes Champion. The Hermes Champion will be at the centre of the transition and the primary source of information to Lodges and Chapters in the MPDI.
- A member of the MPDI who has been involved in its administration and use of Adelphi.
- At least one forward thinking Lodge Secretary and one forward thinking Chapter Scribe E.

Once the software development projects have been completed and the new system has been fully tested, it will be implemented first in one or more pilot provinces. Once the pilot phase has been satisfactorily completed, the rollout to all MPDIs will commence. There is however much for the MPDIs to complete before that time and it is recommended that the steering group meet on a regular basis until the transition to Hermes is complete.

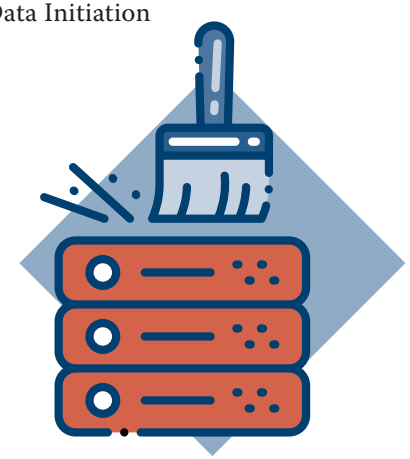
At an early stage, each Provincial steering group will meet with T&RWP representatives within the RCG framework and a similar configuration will be applied to Districts and Inspectorates/Groups based on time zones. They will work through the subjects contained in this document so all can understand the requirements of that MPDI and construct a detailed transition plan..

The key items for consideration will include (but not limited to);

- Data Cleansing
- Hermes user planning
- Training
- MPDI reorganisation
- Support
- Data Initiation

3. DATA CLEANSING

Data Cleansing refers to the task of correcting any inaccurate/empty fields (e.g. email address) or completing any missing fields (e.g. Passing Date) in the member details as held in Adelphi. This initiative has been underway for some time now and is covered by the document 'PreHermesDataCleanse Instructions.pdf'. The spreadsheet version provides convenient statistics on the number of data issues outstanding for the MPDI and this forms a suitable reference for the group to gauge progress on the initiative. Ideally, the MPDI should have completed this before Hermes goes live, to ensure a smooth transition to Hermes for each Lodge and Chapter.



4. HERMES USER PLANNING

It will be the responsibility of the MPDI to manage the user access to Hermes for their Lodges and Chapters.

Every Lodge and Chapter will have a single set of credentials (i.e. username and password) to enable access to Hermes. This will be provided to the Lodge Secretary or Chapter Scribe E and it is recommended that these individuals have the necessary skills to operate Hermes, which is similar in complexity to using Internet banking. Lodges and Chapters should consider a change of officer if necessary, to achieve this. If this is not possible; it will be permitted to pass the access credentials to another member of the unit e.g. Assistant Secretary.

The MPDI will already have a good appreciation of the information technology skills of their Secretaries and Scribes E. It is recommended that the MPDI creates a list of these brethren with perhaps a Red/Amber/Green rating, to better understand where changes or indeed additional training might be required.

Every Hermes user should have private access to the Internet and guard carefully their user credentials. We strongly recommend the UGLE publication 'Members Online Communications Toolkit' for more information on suitable devices for accessing the internet. The following shows the likely acceptable technical configuration for a Hermes user.

Operating system	Vendor supported versions of Windows OS (Desktop) Vendor supported versions of Mac OS (Desktop) Vendor supported versions of Chrome OS (Desktop)
Web browser	Vendor supported browsers from Microsoft, Apple or Google running on one of the operating systems listed above
Internet connection	Broadband: Minimum 2 Mbps download speed / 1 Mbps upload speed (stable connection) Mobile device: 4G or better (stable connection)
Hardware	Minimum 4GB of RAM

5. TRAINING

UGLE will provide a comprehensive training package to all MPDI Steering Groups. The UGLE Training Team will also work with Steering Groups to ensure they are comfortable with both the Hermes system and the available training package.

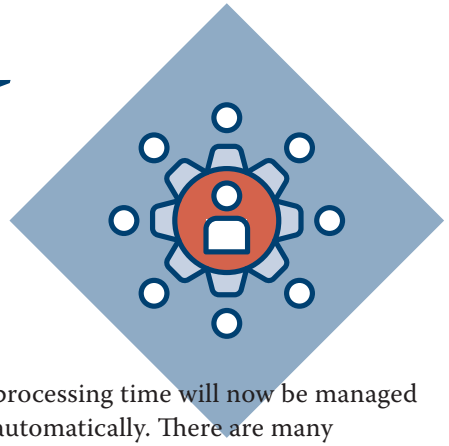
The Steering Groups will then need to utilise this training content to train their Lodge Secretaries and Chapter Scribes, preparing them for their 'Go Live' with Hermes. How MPDIs choose to provide this training will be their own choice and the hope is that it can be integrated into existing MPDI training practices and allow training to be tailored to a MPDI's needs and requirements. It is anticipated that tools such as Zoom will likely be effective in the delivery of the material and engagement with users. The UGLE Training Team will offer guidance and support where possible but MPDI will ultimately have the responsibility of training their Hermes users. In the process of providing training to their LC's, MPDI's may benefit greatly from the use of online remote training tools (if not already using these). There are many of these tools available which can be purchased off-the-shelf at very affordable costs (For example: Zoom, GoTo Training, MS Teams, etc).

This training package will include:

- **Written Guides.** Step-by-step instructions, with accompanying screenshots, covering all processes within Hermes.
- **FAQs.** A record of frequently asked questions with answers or links to the appropriate training material. This will be updated where necessary post-Hermes launch.
- **Video Guides.** Bite-sized video guides showing a screen recording of core processes being completed within Hermes allowing users to see first-hand the complete process before attempting it themselves.
- **E-Learning Content.** A combination of video guidance and interactive examples using an imitation of Hermes. For example, it will show the user a video of a member being resigned and then ask the user to resign the member following the process shown. Note: Any changes made via E-Learning content will not be reflected in the live system.
- **Webinars.** Training webinars covering a range of topics. These webinars will focus on a specific section of the system and explain all relevant screens and functions. For example, a webinar covering the 'Member Registration' process. These webinars should be between 15 and 60 minutes in length to ensure engagement throughout.
- **Hermes "Sandbox".** Effectively a replica of Hermes where users can practice and make changes without affecting the centralised data held within Adelphi.

The training content will also be included in a Help System within Hermes, meaning that even once the system has gone live for a MPDI the material will be readily available to provide on-going guidance."

6. MPDI REORGANISATION



One of the things that you will have noticed when you reviewed the Hermes process flow charts was the absence of any major activity by the MPDI Office with the new online method for processing information. As described above, all of this information is still available to you and your team, as this is stored in Adelphi and accessible in its reporting function.

However, your office will be receiving electronic notifications for a number of items as detailed below in the task list. All of these are documented in the process flows and notifications can be directed to any recipient within your MPDI using Adelphi and Inbox rules, as documented in process flow no. 17, email management.

So, your office will still be busy but with the most significant difference being that you and your team will not be required to physically check any paper forms or enter the information on Adelphi. Please note that this will still be required until your MPDI goes live on Hermes. Additionally, each Lodge and Chapter will still be required to submit the summons in advance of their meeting, if that is the usual custom in your MPDI, although we expect the most common errors in wording to be eradicated by the Sec/SE using the Agenda Creation process on Hermes.

As you will see from the list below, you will need to think about redeployment of duties and responsibilities within your MPDI once Hermes is implemented in your region as a large percentage of processing time will now be managed automatically. There are many differences in the tasks and procedures used by MPDIs and you need to consider your own circumstances carefully. This lists the procedures used in a sample MPDI and how they will differ after the implementation of Hermes.

MPDI TASK LIST

#	PRE HERMES	POST HERMES	HERMES PROCESS
1	Chasing Lodges/Chapters for a timely production of Summonses for each meeting and circulate them as required	An automatic reminder will be sent to each Sec/SE 3 weeks before their meeting date with an alert requesting a log in to "Agenda Creation" on Hermes. If this is ignored, another reminder is sent 2 weeks before with a copy to MPDI Office. This will be the time to chase the Sec/SE for the summons	Agenda Creation
2	Checking for correct wording and compliance in Summons items	The Hermes Agenda Creation process will eradicate common problems. This should be encouraged, if not mandatory, during the training process. Summonses should still be checked for any other issues	Agenda Creation
3	Preparation of MPDI Annual Return	No action - Lodges/Chapters will generate and submit their own Annual Return to UGLE & MPDI.	Annual Return
4	Check Grand Lodge Annual Return and record invoices	No action - Lodges/Chapters will generate and submit their own Annual Return to UGLE & MPDI. Information available to MPDI via Adelphi reports. MPDI Office will receive notification if Sec/SE has not generated the AR by the due date (30 days after subscription year). Further reminders will be sent to MPDI office if payment has not been received after 2 months and 3 months from the subscription date. The Lodge/Chapter will require chasing	Annual Return
5	For Initiates, check the form P has been properly completed with the appropriate payment. Register the new member and forward the form to UGLE.	No action - this will be completed by the Candidate online and submitted directly into Adelphi. Proposer, Seconder and WM will approve independently online. Once recorded as Initiated, the UGLE Registration fee will be automatically added to the Annual Return. MPDI can also add to AR or request payment offline - information on Initiates will be available on Adelphi reports	Candidate for Initiation
6	Processing changes in member personal details submitted by Lodges/Chapter	No action - this will be entered by Lodges/Chapters. Information available to MPDI via Adelphi reports	Change of Member Details
7	Processing changes in membership status – honorary, resignation, death, cessation, exclusion	No action - this will be entered by Lodges/Chapters. Information available to MPDI via Adelphi reports. NB. Resignations will be notified to MPDI Office or "Exit" Team directly, if specified	Change of Member Status

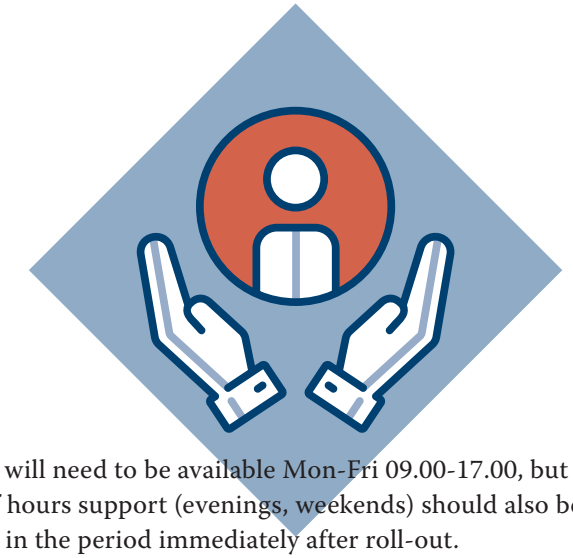
MPDI TASK LIST (CONTINUED)

#	PRE HERMES	POST HERMES	HERMES PROCESS
8	Process requests for Dispensations	Dispensations will be applied for by Sec/SE via Hermes and will appear as an email request at MPDI office who will log into Adelphi to approve/reject. If approved, this will populate a dispensation template (bespoke for each MPDI) which will be sent back to Sec/SE as a pdf attachment to be downloaded. The same will apply to requests to UGLE/SGC	Dispensations
9	For Raising, check the Traditional History was given, update Adelphi and forward the LP&A5 form to UGLE	No action - information added by Lodges. MPDI can access information with Adelphi reports. GLC will be automatically ordered once the Raising is recorded on Hermes	Grand Lodge Certificate
10	After Installation meetings, process the Return and update the list of officers appointed	No action - this will be entered by Lodges/Chapters. Information available to MPDI via Adelphi reports. MPDI Office will receive notification if Sec/SE has not submitted PMR, which includes the Installation Return, within 3 weeks of meeting date and will require chasing	Installation Return
11	For Joiners and Re-Joiners, check Reg Form is correct, process on Adelphi and send form to UGLE/SGC	No action - this will be completed by the Joiner/Re-Joiner online and submitted directly into Adelphi. Proposer, Seconder and WM will approve independently online. Information on this member category will be available in Adelphi reporting	Joiners - Craft & RA
12	Ensuring the correct clearance certificates have been obtained for Joining/Re-joining members	No action - there is an automated process for managing this	Joiners - Craft & RA
13	For Foreign Joiners, get the correct paperwork to submit to UGLE/SGC for validation. Process joining fee and send with Reg form to UGLE/SGC	No action - this will be managed by the Lodge/Chapter directly with UGLE/SGC but expect MPDI to be available to advise. FJ fee will be added to UGLE/SGC Annual Return - MPDI can decide whether to adopt this or manage this manually	Joiners - Craft & RA (Foreign)
14	Ensuring that Honorary membership is granted to members who meet the specified criteria	If applicable, summons scrutineers should pick this up before the ballot is held	Outside of Hermes

MPDI TASK LIST (CONTINUED)

#	PRE HERMES	POST HERMES	HERMES PROCESS
15	Prior to Installation meetings, produce reports for visits by MPDI leaders or Visiting Officers to allow them to prepare	This will still be required if the custom in MPDI	Outside of Hermes
16	After the Installation enter recommendations for appointment or promotion into Adelphi	This will still be required if the custom in MPDI	Outside of Hermes
17	Prepare annual membership movements report for the annual MPDI meeting	Use the Adelphi Statistical Reports or Dashboard	Outside of Hermes
18	Reports and analysis required by the MPDI Executive	This will still be required	Outside of Hermes
19	Train and assist new Secretaries/Scribes E to be familiar with the forms and procedures	This will still be required although a large part of this will be readily available as Hermes user training	Outside of Hermes
20	Processing post meeting reports	No action - this will be entered by Lodges/Chapters. Information available to MPDI via Adelphi reports. MPDI Office will receive notification if Sec/SE has not submitted PMR within 3 weeks of meeting date and will require chasing	Post Meeting Report
21	For Passing, update Adelphi using information on LP&A5	No action - information added by Lodges. MPDI can access information with Adelphi reports	Post Meeting Report
22	For Exaltations, check Reg Form, update Adelphi and forward the form to SGC with Reg Fee	No action - this will be completed by the Candidate (Exaltee) online and submitted directly into Adelphi. Proposer, Seconder will approve independently online. Once recorded as Exalted, the SGC Registration fee will be automatically added to the Annual Return. MPDI can also add to AR or request payment offline - information on Exaltees will be available on Adelphi reports. SGC Certificate will be automatically ordered	RA Joiner - Exaltee

7. SUPPORT



FIRST LINE SUPPORT

First line of support encompasses all Masonic administration queries. MPDIs are expected to provide all first line support to their respective Lodge Secretaries / Chapter ScribesE, which should be made available by telephone and / or email. Dedicated point of contact details should be communicated at the same time as rollout. MPDI's will be responsible for nominating and structuring their individual first line support teams. If first line support (MPDI's) are unable to resolve an issue and deem it to be either, an application bug or a system issue, they can escalate the issue to second line support (at UGLE) via an extension of the ticketing system already deployed by UGLE. Please see below to learn more about the "Ticketing System".

SECOND LINE SUPPORT

UGLE will provide second line support to the MPDI's to deal with queries escalated by them (MDPI's) via the ticketing system. Second line support will be restricted to MPDI's and used only where they are unable to resolve queries themselves. On receiving a ticket from an MPDI, the second line support operator's first job will be to validate the ticket as being either an application bug, a system issue or a deficit in the training material and will then categorise the ticket and assign it to the correct operator.

HOURS

First Line Support will need to be available Mon-Fri 09.00-17.00, but we strongly suggest that out of hours support (evenings, weekends) should also be available on request, especially in the period immediately after roll-out.

TICKETING SYSTEM

UGLE will expand their current ticketing system to allow first line support operators (within each MPDI) to escalate relevant queries which they are unable to resolve themselves. This ticketing system will not be used directly by the Lodges and Chapters within MPDI's.

REMOTE ASSISTANCE

In the process of providing first line support to their LC's, MPDI's may benefit greatly from deploying remote assistance tools. There are many of these tools available which can be purchased off-the-shelf (e.g. Zoom, LogMeIn, RAdmin, PC Anywhere, etc) at very affordable costs, and it is hoped in due course to formulate a recommended approach.

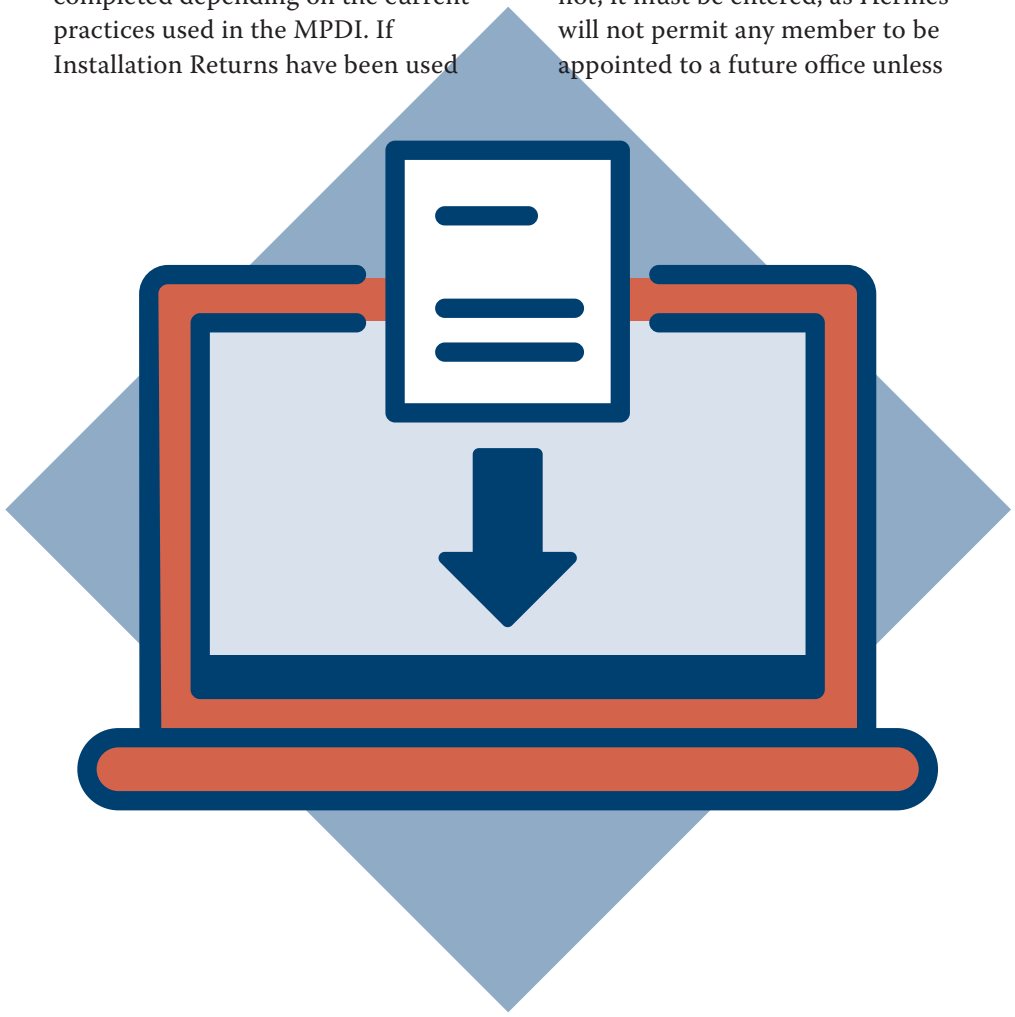
8. DATA INITIATION

Once a Lodge or Chapter user first gains access to Hermes, they will be requested to carry out a number of preliminary tasks. These tasks will ensure there are no inaccuracies or gaps in the unit's data, and also carry out other preparatory work. This also provides an excellent opportunity to become familiar with Hermes. As this will be the first occasion after training when the user will be operating the system 'for real', the MPDI should be ready to offer support and assistance. For a full description of the Data Initiation phase refer to the document "Hermes Data Initiation Guide". In summary the broad tasks are as follows:

- **Check Lodge or Chapter details.** This is to ensure that the information held in Adelphi about the unit agrees with local practice. For example, are the meeting dates correct?
- **Check Member's Personal Details.** This is to ensure that details held in

Adelphi about each member (e.g. email address) are correct. There is also the opportunity to add new fields like a current photograph of the member.

- **Check Members Masonic Details.** This is to ensure that the masonic details held about the members in Adelphi are correct. For example, each member's status as a subscribing or honorary member.
- **Check Members Officer History.** This may or may not already be completed depending on the current practices used in the MPDI. If Installation Returns have been used and entered into Adelphi, then the appropriate history will be visible. If not, it must be entered, as Hermes will not permit any member to be appointed to a future office unless there is history of him having served in an office which is a pre-requisite.
- **Circulate Grand Lodge Reference Numbers.** Lodge and Chapter members must be made aware of their Grand Lodge Reference Number. This information will be required if the member wishes to join another unit or undertakes any part of a ceremony when visiting another Lodge or Chapter.



HERMES