



HERMES

Hermes September Update

Change Log (06/09/2023)



UNITED GRAND LODGE
OF ENGLAND

Contents

Please see below list of system updates included within the Summer Update release.

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Guidance


Joining or Resigning with effect from a future date

Joiner - Taking up Membership at a future date

When processing a successful 'Ballot for a Joiner' within a Post Meeting Report, you can now select whether they took their membership up immediately (i.e. at the meeting they were balloted), or whether they wish to begin their membership at a future date (for example, at the start of the next Subscription Year).

Common Scenario - Ballot was successful and member wishes to take up membership immediately

In this circumstance, as before, the Hermes Administrator will update their Post Meeting Report indicating that the Ballot took place and was favourable. He will then indicate that the member took their membership up immediately.



The screenshot shows a web form titled "Update PMR Item". At the top right, there is a "Raise Request" link with a help icon. Below it are "Cancel" and "Save" buttons. The main content area is titled "Ballot for a Joiner - [redacted]". It contains three questions, each with a "Yes" dropdown menu:

- Did the ballot take place Yes ▾
- Was the ballot successful Yes ▾
- Did they take up their membership immediately Yes ▾

This will, upon submission of the PMR and completion of meeting, remove the Prospective Member record and add them as a 'Current Member'. They will receive emails confirming they have joined the Lodge/Chapter, all as they would have previously.

Common Scenario - Ballot was successful and member wishes to take up membership at start of next Subscription Year

In this circumstance the Hermes Administrator will again update their Post Meeting Report indicating the Ballot took place and was favourable, however they will then indicate that the member did not wish to take his membership up immediately.

Update PMR Item

Raise Request ⓘ

Cancel ⓘ Save

Ballot for a Joiner - [REDACTED]

• Did the ballot take place

• Was the ballot successful

• Did they take up their membership immediately

• On what Date do they intend to take up their membership

The Hermes Administrator will then be able to select at what date they wish to take up the membership. This will default to the first day of the next Subscription Year for ease, as we believe this is the most common scenario, however it can be changed to another date if necessary.

Upon submission of the PMR and the completion of the meeting, the member will remain as a Prospective Member, with a new status indicating that they will be joining in the future.

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Name	GL Ref	Prospective Member Type	Enquiry Date	Status	P	S	WM	To Be Initiated By
[REDACTED]	8040192	Prospect	23-JUL-2023	Current	N	N	N	
[REDACTED]		Prospect	24-JAN-2023	Current	N	N	N	
[REDACTED]	4957172	Candidate	04-SEP-2023	Current (Joining 02/10/2023)	Y	Y	Y	
[REDACTED]		Candidate	27-MAR-2023	Current	Y	Y	Y	

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4 All
0 Enquirer
2 Prospect
2 Candidate

On the morning of the day selected, the system will automatically update their record, removing the Prospective Member, adding them as a 'Current Member' and sending the relevant emails.

Limitations and Considerations

1. Please note that currently there is no functionality to amend the date they wish to join, once it has been selected. To have the date changed, please ask your Hermes Administrator to raise a Support Request and escalate it to UGLE, making sure it includes the relevant Prospective Member record, the date they originally selected and the date they wish it to be changed to.
2. Please also note that automatic emails will only be sent at the date they join the Lodge/Chapter, meaning there will be no confirmation of the ballot being successful sent via email.



Resignation – Resignation with effect from a future date

When recording a member as having resigned from Lodge/Chapter, the Hermes Administrator will now be able to specify on which date the resignation will take effect.

Please Note this field replaces the previous ‘Status Effective Date’ field.

Once this date has been entered and saved successfully, the member will remain as a ‘Current Member’ but automatic emails will still be sent, as before, to the member (CC’ing the Lodge/Chapter Membership Officer and Almoner) and to the Provincial Membership Team.

Should a Hermes Administrator review the ‘Member Details’ screen for the member, it will indicate that they have a ‘Membership Status’ of ‘Current (Pending Resig.) – DD/MM/YYYY’.

Please Note: The Hermes Administrator may, should they need to, still update the membership record again if they need to record the membership status as Rule 148/Reg 71 or Deceased or amend the arrears status and amount.

On the morning of the date entered, the member's record will automatically be marked as 'Resigned' and they will no longer appear in the 'Current Member' list, instead appearing in the 'Past Member' list.

Limitations and Considerations

1. Please note that currently there is no functionality to amend the date that was entered. To have the date changed, please ask your Hermes Administrator to raise a Support Request and escalate it to UGLE, making sure it includes the relevant Member's name, the date they originally selected and the date they wish it to be changed to.
2. Should the resignation be rescinded, this will still need to be processed via the UGLE Registration Team via your Provincial/District Office.
3. No automatic emails will be sent and no notification will be shown to the Hermes Administrator, once the resignation takes effect, the emails are sent at the point the resignation is recorded instead.
4. Should the Lodge/Chapter wish to Elect the member to Honorary instead of them resigning at a future date, the resignation must be rescinded in the system before processing the 'Elect to Honorary' Agenda Item in a Post Meeting Report.

Other Changes and Bug Fixes

Bug Fix - Apologies Received 'Update' Button no longer inactive

The 'Apologies Received' 'Update' button is now fixed and can be used to record apologies prior to a meeting.

Bug Fix - Post Meeting Report tab 'Update' buttons now inactive before meeting

The 'Update' buttons on the 'Post Meeting Report' tab are now correctly inactive prior to the date of the meeting, or if there are no agenda items added to the agenda.

Bug Fix – Issues recording certain Offices/Posts on Installation Returns now fixed

After the last update a bug was introduced that caused issues recording members as having taken up an Office/Post that did not require membership within the Lodge/Chapter, as well as showing duplicate records when searching for a member who held multiple memberships. These issues should now be resolved, however if you believe the issue persists please have the relevant Lodge/Chapter raise a Support Request for further investigation.