



HERMES

Hermes Summer Update

Change Log (27/06/2023)



UNITED GRAND LODGE
OF ENGLAND

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Guidance

Prospective Members

New 'Add Enquirer' screen

A new screen has been added upon clicking 'Add Enquirer' on the Prospective Member screen to help Hermes Administrators ensure they add enquirers correctly and, when progressed, send them the appropriate Online Registration Form.

The screenshot shows the 'Add Enquirer' screen with the following content:

Add Enquirer

[Raise Request](#)
[Cancel](#) [Next >](#)

To add an enquirer, please begin by selecting what type of joiner you expect them to be:

- Initiate: The enquirer has expressed an interest in joining Freemasonry, and has never been a member previously.
- Joiner: The enquirer holds, or previously held, membership within a UGLE Lodge.
- Foreign Joiner: The enquirer is a Freemason, but has never been a member of a Lodge under the UGLE Constitution.

The screen simply asks what join type they expect the Enquirer to be, and then alters the subsequent screen according to the selection. For example, if 'Joiner' is selected, the Hermes Administrator will no longer be able to click 'Create New' after searching for the member as they should exist in the database and therefore their member record should be selected.

The screenshot shows the 'Add Enquirer' screen after the 'Joiner' option has been selected. The search results are as follows:

Add Enquirer

[Raise Request](#)
[Cancel](#)

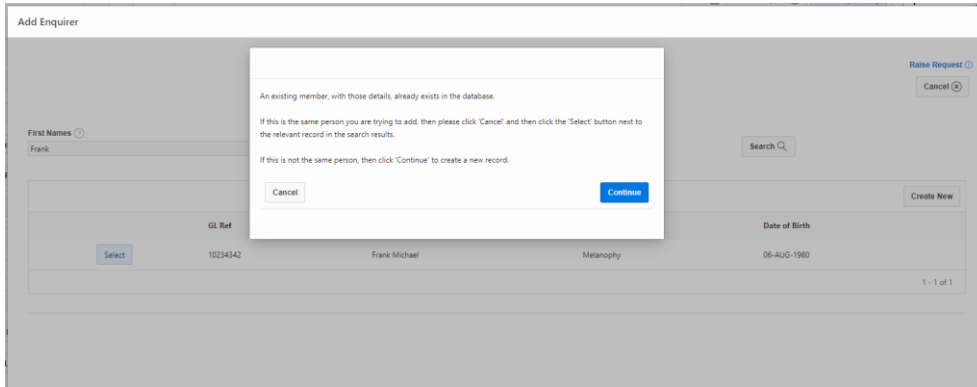
GL Ref: 10234342 | First Names: | Surname: | Date of Birth (DDMMYYYY): | [Search](#)

GL Ref	First Names	Surname	Date of Birth
10234342	Frank Michael	Melanophy	06-AUG-1980

[Select](#) | 1 - 1 of 1

Screenshot after 'Joiner' selected

Additionally, should they select Initiate, Foreign Joiner or Foreign Exalte and then their search identifies a matching member record, they will be asked to confirm they wish to create a new member record, rather than select the existing match.



These changes should help ensure that, upon progressing an Enquirer and sending them the Online Registration Form, the relevant options are available, making the process more intuitive.

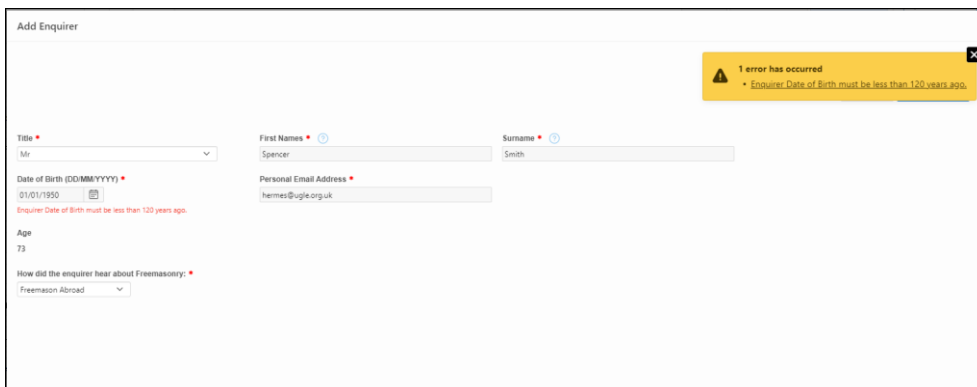
Add Enquirer GL Ref Search Removes Other Search Values

When searching for an Enquirer, if a 'GL Ref' is entered as a search parameter, any previously entered 'First Names', 'Surname' or 'Date of Birth' will be removed. Similarly, if you enter a 'GL Ref' you will not be able to add 'First Names', 'Surname' or 'Date of Birth'. This change should help those Hermes Administrators who previously entered a 'GL Ref' but then mistyped a name or date of birth and therefore found no matching records. Given a 'GL Ref' is unique and a direct link to that member, there is no need to add additional search parameters.

'Date of Birth' Validation and 'Age' Field

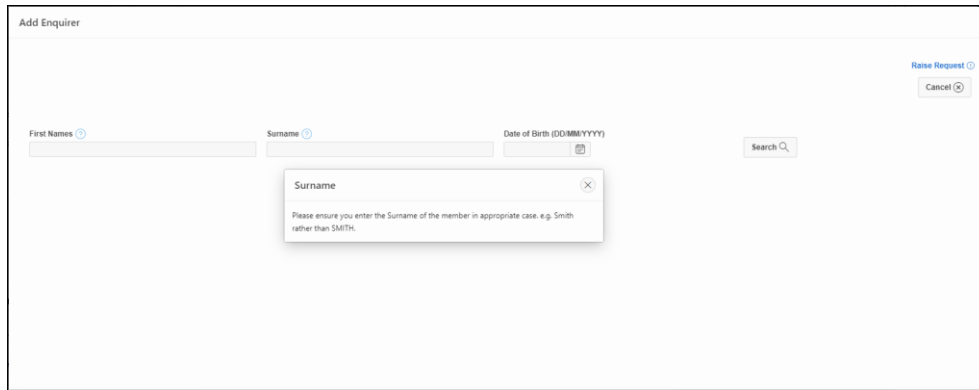
When adding an Enquirer an 'Age' field is now displayed, calculated based on the entered age (it can therefore not be amended directly). This should help highlight mistyped dates of birth.

Additionally, if a 'Date of Birth' is entered that would result in an age of greater than 120, when saving the system will provide an error.



Help Text on 'First Names' & 'Surnames'

New Help Text has been added to 'First Names' and 'Surname' when adding enquirers that provides guidance on how names should be entered.

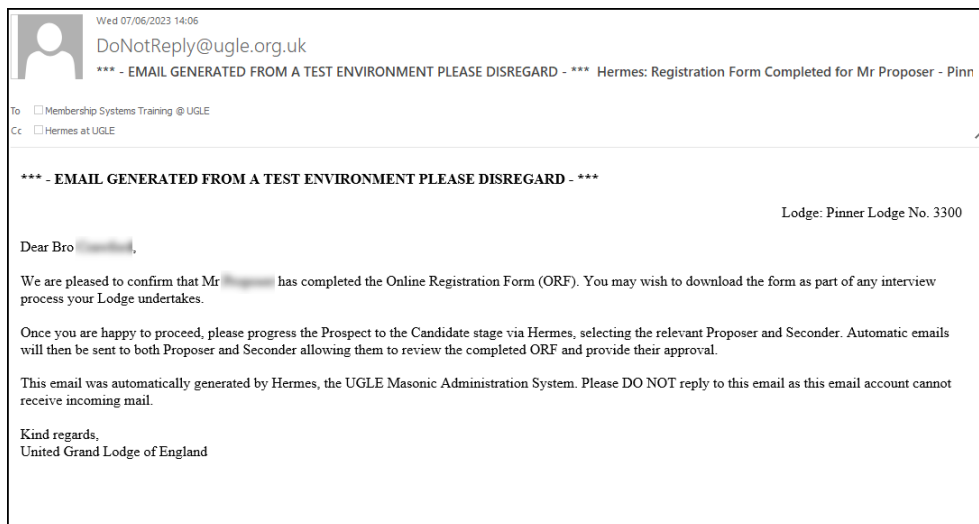


Comma causing issues in Address

A bug that occasionally caused issues with Addresses that included a comma has been resolved.

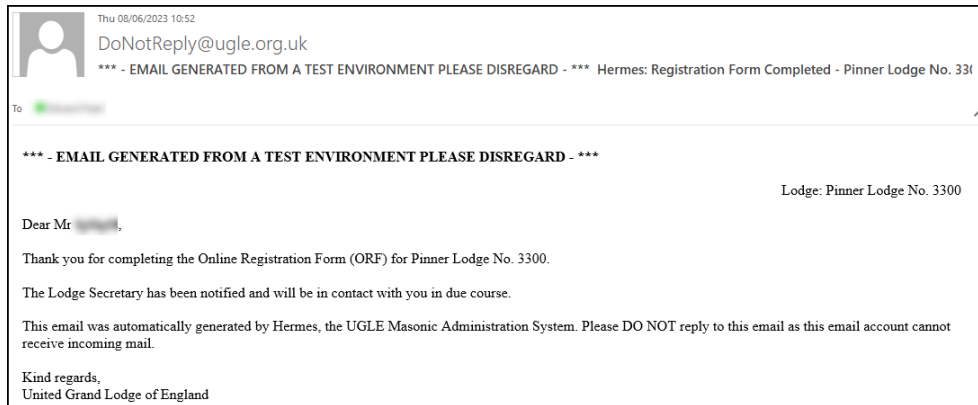
Genuine Enquiry & Online Registration Form Completion Emails (Sec/SE & HA)

Hermes will now automatically send an email to the Secretary/Scribe E and Hermes Administrator when an applicant completes either the Genuine Enquiry process, or an Online Registration Form, alerting them as well as reminding them of the next steps.



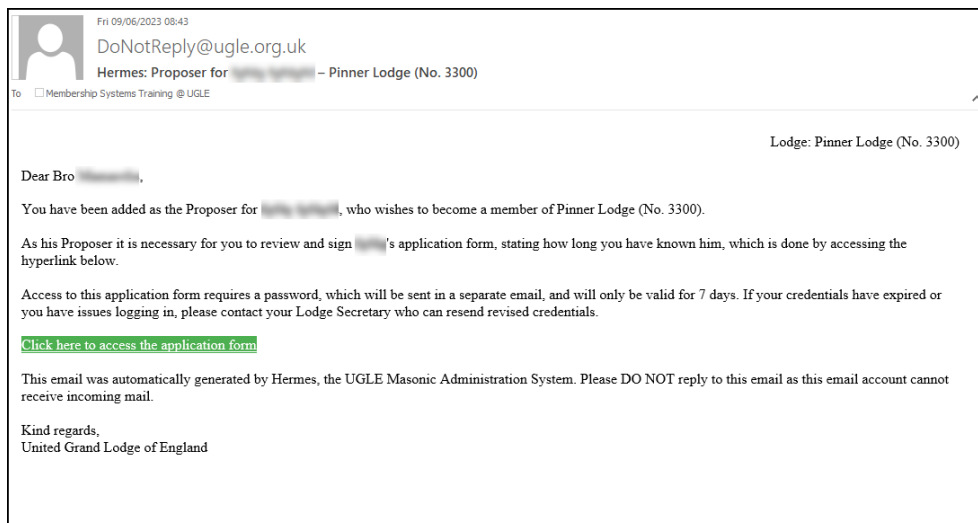
Genuine Enquiry & Online Registration Form Completion Emails (Applicant)

Hermes will also now automatically email the applicant, confirming their completion of the Genuine Enquiry process or Online Registration Form.



Proposer/Secunder Emails

The emails sent to Proposers and Secunders have been updated to better explain why they have received them and what actions they must take.



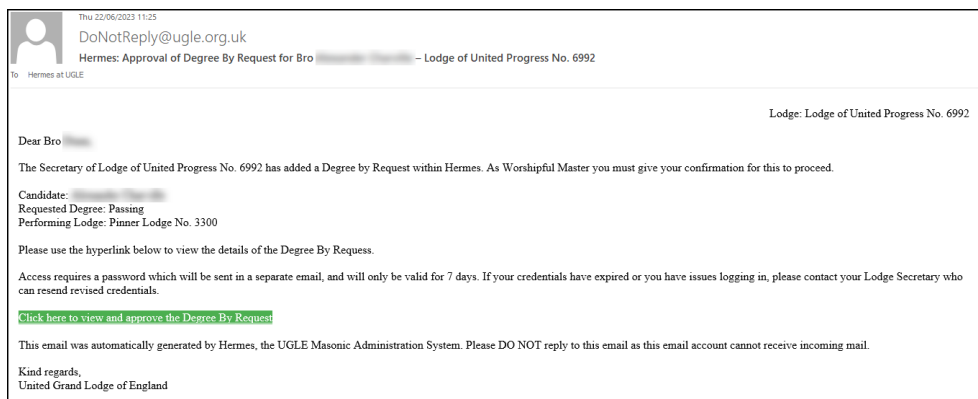
WM/MEZ Online Registration Form Approval Emails

The emails sent to Worshipful Masters and First Principals have been updated to better explain why they have received them and what actions they must take.



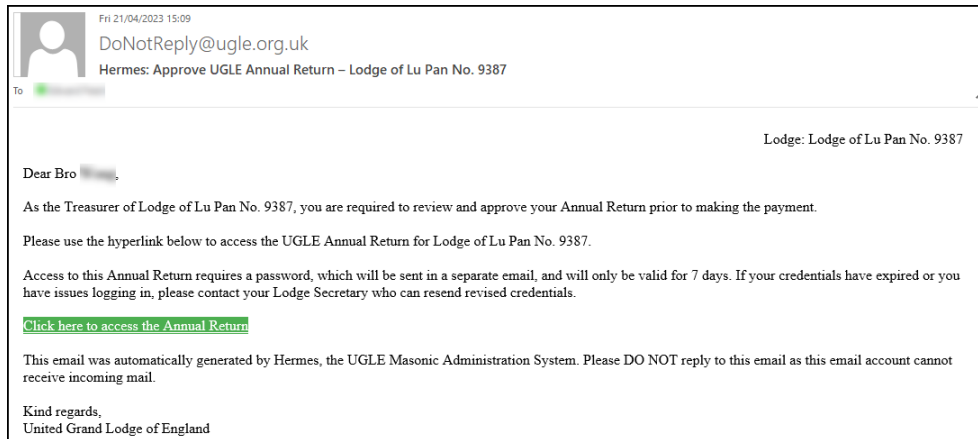
'Degree By Request' Worshipful Master Approval Emails

The emails sent to Worshipful Masters when a 'Degree By Request' is added by their Lodge's Hermes Administrator have been updated to better explain why they have received them and what actions they must take.



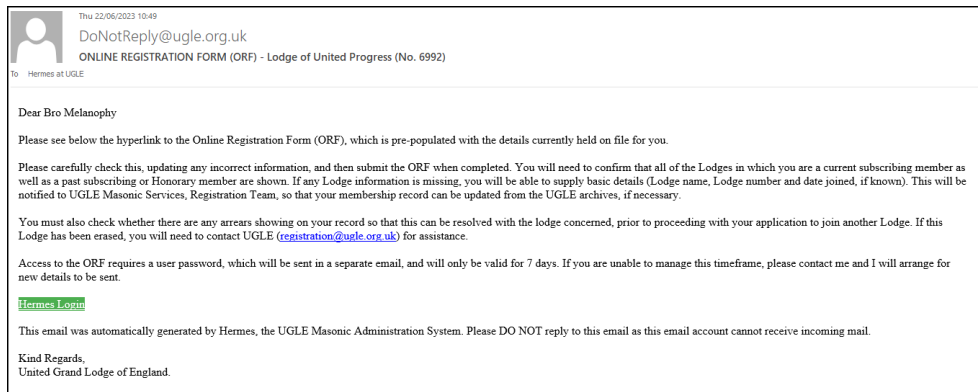
Treasurer Annual Return Approval Emails

The emails sent to Treasurers when an Annual Return is sent to them have been updated, to better explain why they have received them and what actions they must take.



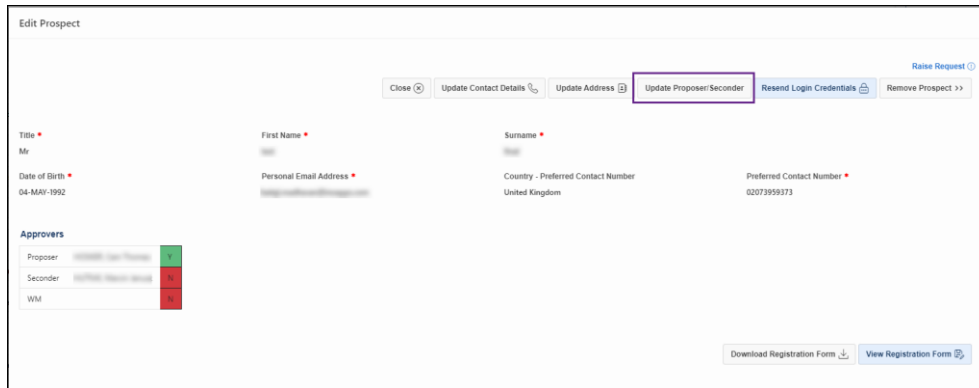
Online Registration Form Applicant Email Signature Update

The emails sent to applicants requesting they complete the Online Registration Form have had their signatures updated, so that they are consistent with other emails sent automatically from Hermes.



New 'Update Proposer/Seconders' button added

A new 'Update Proposer/Seconders' button has been added, allowing Hermes Administrators to change Proposers and Seconders up until the point that the Worshipful Master/1st Principal approves the Prospect.



The screenshot shows the 'Edit Prospect' interface. At the top right, there is a 'Raise Request' button. Below it is a row of action buttons: 'Close', 'Update Contact Details', 'Update Address', 'Update Proposer/Seconders' (highlighted with a purple box), 'Resend Login Credentials', and 'Remove Prospect >>'. The form fields are as follows:

- Title: Mr
- First Name: [Redacted]
- Surname: [Redacted]
- Date of Birth: 04-MAY-1992
- Personal Email Address: [Redacted]
- Country - Preferred Contact Number: United Kingdom
- Preferred Contact Number: 02073959373

The 'Approvers' table is shown below the form fields:

Approver	Status
Proposer	Approved
Seconders	Approved
WM	Approved

At the bottom right, there are two buttons: 'Download Registration Form' and 'View Registration Form'.

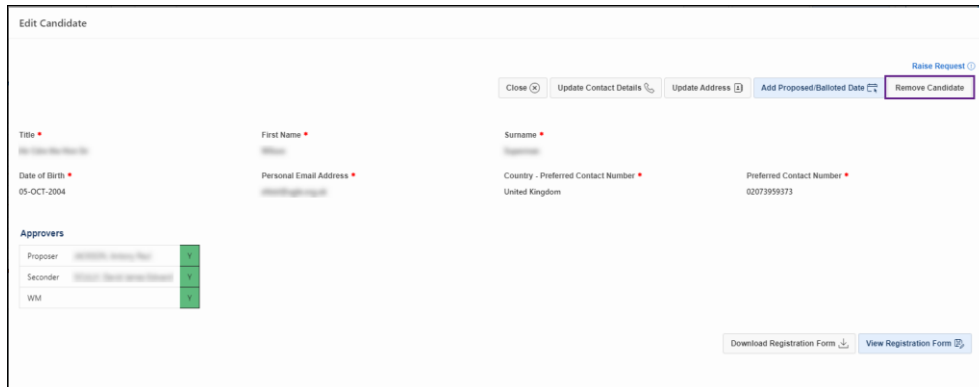
When changing a Proposer or Seconder, the new person will automatically receive emails with new links and credentials to approve the Prospect. This only affects new Proposers and/or Seconders.

Correction of 'Lodge' to 'Chapter' when 1st Principal Approves Online Registration Form

Previously, when an MEZ approved an Online Registration Form, the word 'Lodge' was shown in one of the paragraphs of text, instead of dynamically changing to say 'Chapter'. This has been corrected.

New 'Remove Prospect' and 'Remove Candidate' buttons added

New buttons have been added allowing the removal of Prospects and Candidates, where previously this option was unavailable.

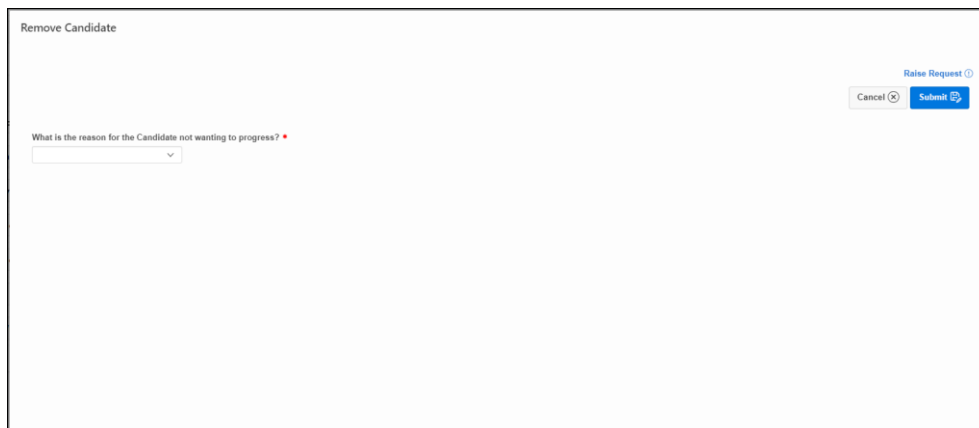


The screenshot shows the 'Edit Candidate' form with the following fields and buttons:

- Buttons: Close, Update Contact Details, Update Address, Add Proposed/Balloted Date, **Remove Candidate** (highlighted), Raise Request.
- Title: [Redacted]
- First Name: [Redacted]
- Surname: [Redacted]
- Date of Birth: 05-OCT-2004
- Personal Email Address: [Redacted]
- Country - Preferred Contact Number: United Kingdom
- Preferred Contact Number: 02073959373
- Approvers table:

Approver	Approved
Proposer	<input checked="" type="checkbox"/>
Seconder	<input checked="" type="checkbox"/>
WM	<input checked="" type="checkbox"/>
- Buttons at bottom: Download Registration Form, View Registration Form.

Using these new buttons will open a screen requesting the reason for removal before confirming the change.



The screenshot shows the 'Remove Candidate' form with the following elements:

- Buttons: Cancel, **Submit**, Raise Request.
- Text: What is the reason for the Candidate not wanting to progress?
- Dropdown menu: [Redacted]

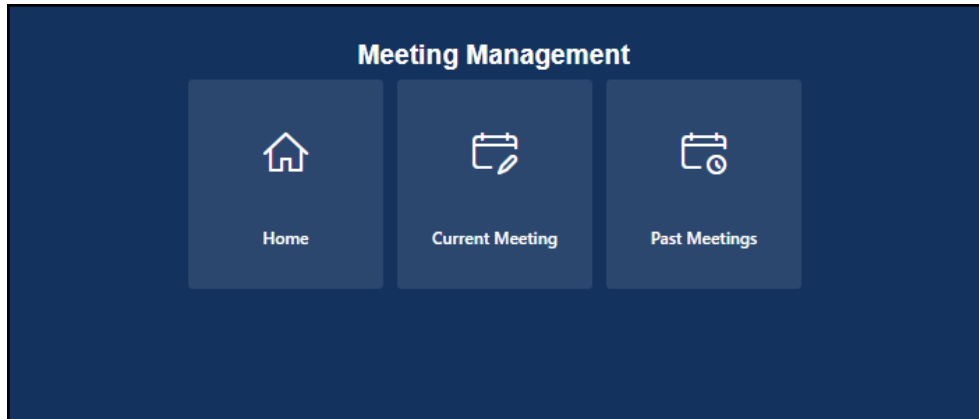
'Cancel' Button on 'Edit Candidate' Screen Changed to 'Close'

We have changed the label of the 'Cancel' button on the 'Edit Candidate' screen to 'Close' which better reflects its action and is more consistent with other screens.

Meeting Management

New Menu Screen added to 'Meeting Management'

To facilitate other changes (listed below), a new screen has been added to 'Meeting Management', consistent with other areas of the system.



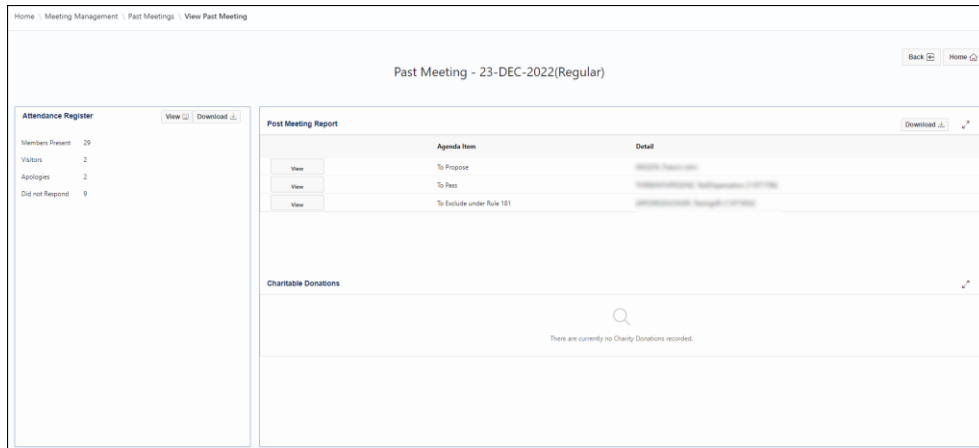
New 'Past Meetings' Screen Added

A new screen has been added allowing Hermes Administrators to see a summary of all meetings submitted through Hermes. This screen can be sorted and filtered, and gives information such as the number of agenda items included in that meeting, the total donations made, the attendance and when the Post Meeting Report was submitted. Additionally, the Meeting Date is displayed as a button, and can be clicked to access further information about that meeting specifically.

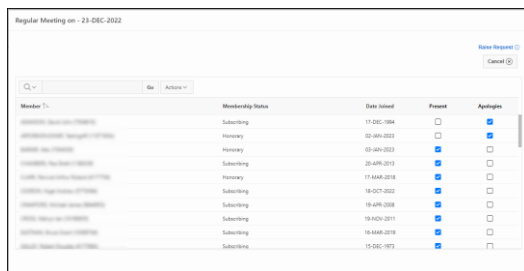
Meeting Date	Agenda Items	Total Donations	Membership at Date	Members Present	Apologies Received	Members DNE	Percentage Attendance	Visitors	Total Attendance	PMR Submitted On
31-03-2023	1		0	0	0	0	0%			05-04-2023
30-03-2023	1		42	40	0	2	95%	0	40	05-04-2023
18-03-2023	1		42	40	0	2	95%	0	40	05-04-2023
22-02-2023	2		42	41	0	1	98%	0	41	05-04-2023
21-01-2023	1		42	19	1	22	45%	0	19	05-04-2023
04-01-2023	1		42	39	0	3	93%	5	44	30-03-2023

New 'View Past Meeting' Screen Added

A new screen has been added that allows a Hermes Administrator to view a previously completed meeting.

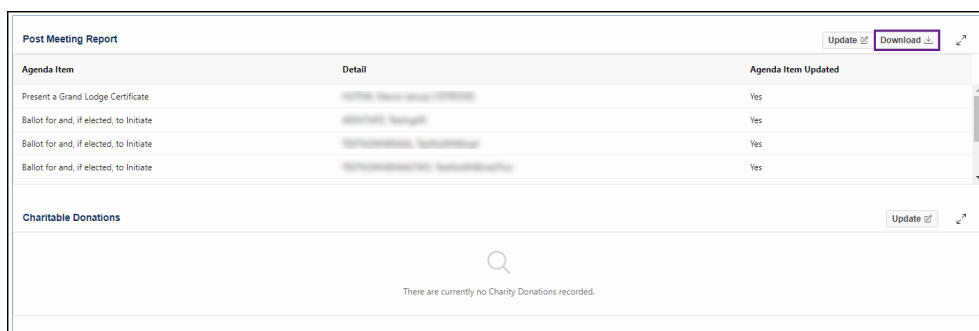


This screen initially shows a summary of the Attendance, Post Meeting Report items and Charitable Donations, but 'View' buttons can be used to see more detailed information (such as the Attendance Register and what was submitted for a specific PMR Item, including Ceremonial Participation).



Download Post Meeting Report Summary Document

The Post Meeting Report can now be downloaded, using the newly added 'Download' buttons available within the Post Meeting Report section of both the 'View Past Meeting' screen and the 'Current Meeting' screen.



Post Meeting Report Summary Document

The Post Meeting Report Summary Document can be downloaded using the newly added 'Download' buttons within both the 'Current Meeting' screen and 'View Past Meeting' screen, which serves 3 purposes:

1. Prior to clicking the 'Submit PMR & Complete Meeting' button, as a form of checking what has been entered for each Agenda Item. This should give confidence to Hermes Administrators that information has been entered correctly.
2. Either shortly before clicking 'Submit PMR & Complete Meeting' button or shortly after, via the 'View Past Meeting' screen, to use as the basis of their Minutes. The document should help Secretary/Scribe Es to write their Minutes by confirming what took place with basic but appropriate wording.
3. While reviewing a Past Meeting, using the 'View Past Meeting' screen, to see what was entered at a specific meeting in the past (rather than viewing each Agenda Item individually).

To ballot for as a joining member: W Bro Frank Michael Melanophy PProvGSwdB, ProvDepGSec (W. Lancs.)
 Of Freemasons' Hall, 60 Great Queen Street, London, WC2B 5AZ
 Age 42
 A retired Golf Club Professional
 A member of Thurston Chapter No. 2525, Palatine Chapter No. 2447, Cuerden with Withy Chapter No. 7733
 Proposed by W Bro Keith Dunn PPAGDC
 Seconded by Bro Alexander James Pickles
 Proposed in open Lodge: 10th day of September 2022
The ballot was favourable

To Proclaim as Master for a further year W Bro Keith Dunn PPAGDC
W Bro Keith Dunn PPAGDC was Installed as Master

Common Agenda Items Added to Agenda Download Document (e.g. 'To open the Lodge', 'To read the Dispensation' and 'The Risings')

Commonly used 'Agenda Items' have been added to start and end of the Agenda Download Document to help Secretary/Scribes E when creating their Summons.

Add the following as appropriate:
 To Open the Lodge
 To acknowledge receipt of the Dispensation
 To read the Dispensation
 To approve the Minutes of the last Regular Meeting
 To receive a report from the Almoner

Add the following as appropriate:
 The Risings
 To Close the Lodge

These will help those that are creating their Summons from scratch, as well as act as a reminder for them to include infrequently used agenda items (e.g. 'To read the Dispensation') within their Summons.

New Master and Foreign Joiner Declaration Text Added to Agenda Download Document

Additional text has been added to the Agenda Download Document for relevant 'Agenda Items' that displays the appropriate Master or Foreign Joiner declarations. The Master declaration will even correctly populate the wording they selected when they completed the ORF approval process.

To ballot for as a Candidate for Initiation Mr Frederick Bloggs
Of London, SW1A 1AA
Age 38
A Training Officer at UGLE 60 Great Queen St London
Proposed by W Bro Michael Peter Jarvis PDepGReg
Seconded by W Bro Philip Adrian Bull LGR (London)
Proposed in open Lodge: 19th day of November 2022

To be read out by the Master at the meeting.

I have made due enquiry with regard to the character and qualifications of the above-named Candidate and certify that in the opinion of a Committee of members of the Lodge he is a fit and proper person to be admitted as a member of this Lodge.

Minor Additional Amendments to Agenda Download Document

Additionally, some minor amendments have been made to the existing wording of specific Agenda Items within the Agenda Download Document.

Joining Members Can Now be Included as Officers When Completing Installation Returns

Members who joined at an Installation Meeting can now be recorded as also having taken up Office at the same meeting.

It is important to first update the 'Agenda Item' in the Post Meeting Report, to confirm the election of the new joining member was successful. This will ensure that his name will later appear as an option in the list when selecting those Officers appointed.

Automatic Change of Hermes Administrator upon Submission of Change within Installation Return

If a new Hermes Administrator is recorded within an Installation Return then, upon the submission of the PMR and completion of that meeting, the system will now automatically change the Hermes Administrator Account to the newly selected member.

Before marking the meeting as 'Complete', an additional message will be displayed prior to them confirming, advising them that they will be logged out and new credentials sent.

Submit PMR & Complete Meeting

Please confirm you want to submit this meeting's Post Meeting Report and mark the meeting as 'Complete'. Once 'Complete' you will be unable to view or update data related to this meeting.

Please therefore ensure you have correctly entered the following:

- Attendance Register & Visitors
- Post Meeting Report
- Charitable Donations

Once confirmed, you will automatically be taken to the next meeting.

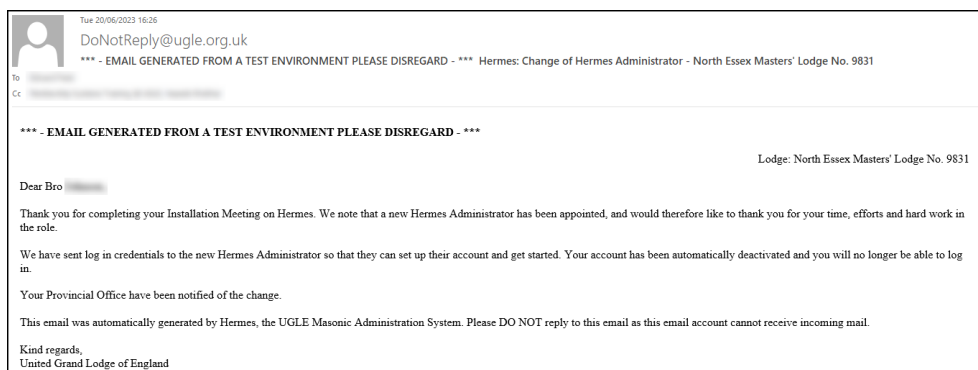
WARNING: Change of Hermes Administrator

As this is an Installation meeting and you have indicated that you will be stepping down as Hermes Administrator, your account will be locked and new credentials sent to your replacement upon submission of this meeting. Please therefore ensure that any other processing you need to do is completed prior to submitting this meeting.

I have read the above, and confirm all relevant details for this meeting have been entered correctly.

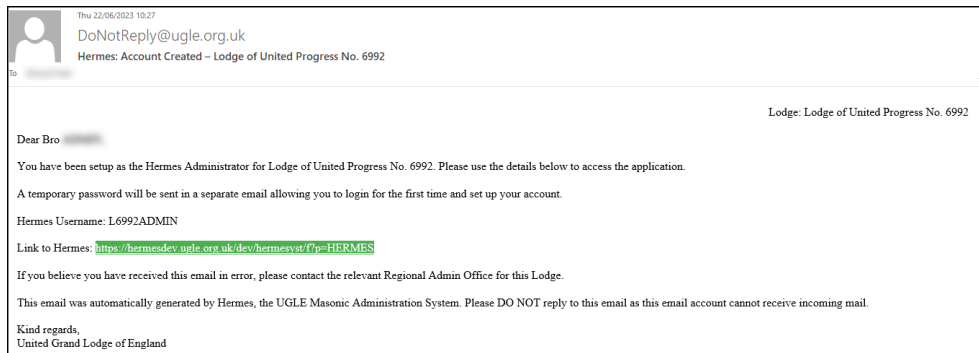
Upon confirming the completion of the meeting, the following will occur:

1. Outgoing Hermes Administrator will be logged out, and can no longer log in as their account will have been disabled.
2. New Hermes Administrator Account emails are sent to the Incoming Hermes Administrator so that they can set up their account and Security Questions.
3. Outgoing Hermes Administrator will receive an email thanking them and confirming the change. This email is also copied to the Incoming Hermes Administrator and the Secretary/Scribe E, if necessary. It also is BCC'd to the relevant Provincial/District Office for their information.



Reset Account & New Hermes User Emails (& ADELphi screen)

The emails sent to Hermes Administrators when their account is first created as well as those sent if they have their account reset (in the event they had forgotten their Password and Security Question Answers), have been updated to be consistent with other automatic emails from Hermes, and to better explain why they have received the emails. A new ADELphi screen will also allow Provincial/District Offices to manually change Hermes Administrators and reset accounts (further information will be provided to Provincial and District Offices regarding this separately).



System Generated Emails

DMARC Added to All Automatic Emails Sent from Hermes

UGLE has implemented DMARC on all outgoing emails, which should reduce the likelihood of issues causing emails to not be successfully delivered (for example, previous issues with @btinternet.com accounts not receiving certain emails from UGLE).

Please Note: This is a technical change and there will be no visible difference to recipients.

Duplicate Officers Causing Issues with Automatic Emails - Fixed

We have resolved a bug that caused issues with automatic emails when duplicate Officers had been errantly recorded. The system will now only send emails to the most recently recorded Officer. Should emails be received by the incorrect recipient, please ensure you raise a Support Request.

Resignation / Deceased Emails to Province not Sending - Fixed

We have resolved a bug that was causing issues with the automatic emails sent to Provinces/Districts when a member was recorded as having been resigned or marked as deceased.

Halt Emails to Province not Sending - Fixed

We have resolved a bug that was causing issues with the automatic emails sent to Provinces/Districts when a Prospective Member went in to, or was released/rejected from, Halt.

Annual Returns

Treasurer Date of Birth Bug Preventing Log In - Fixed

A bug that previously existed that might, in certain circumstances, have prevented a Treasurer from being able to log in with their Date of Birth has been resolved.

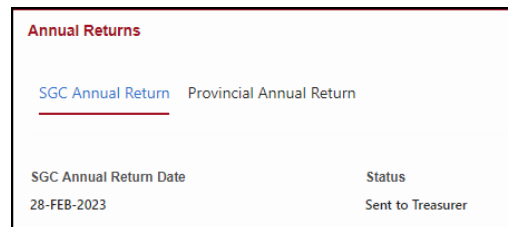
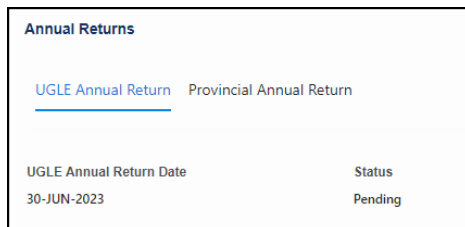
District Annual Return Payment Details Emails (Sent after Treasurer Approval) have been Updated to Better Accommodate District Payment Practices

The 'Payment Details' emails for Districts have been updated to better accommodate District payment practices.

Please Note: The 'Payment Details' emails for Provinces are unaffected by this change.

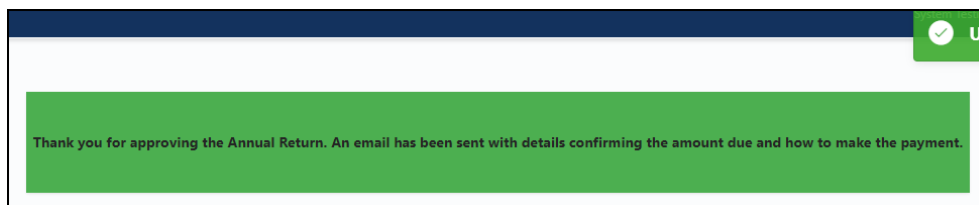
'Annual Return' Screen Now Correctly Displays UGLE or SGC Annual Return as Appropriate

The 'Annual Return' screen will now correctly display UGLE Annual Return when logged in as a Lodge, and SGC Annual Return when logged in as a Chapter.



Treasurer Approval Text Corrected

Previously, after a Treasurer approved an Annual Return, the text within the thank you message had a minor cosmetic issue. This has been resolved and the message is now correctly displayed.



Dispensations

Dispensations for Out of Province Meeting Place Bug Resolved

A bug that caused problems when approving a request for a Dispensation to meet at a meeting place within another Province has been resolved.

Dispensation for 'Change of Venue Pending Permanent Removal [BoC 141 (v)]' Updated

The wording of the Dispensation for 'Change of Venue Pending Removal [BoC 141 (v)]' has been improved to include a length of time that the Dispensation is valid for.

Please Note: Hermes Administrators should only apply for this Dispensation once in a calendar year, as it is applicable for all meetings in that period.

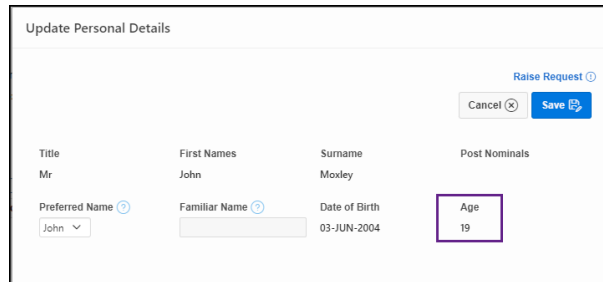
Electing a WM Who Has Not Served Full Year by Dispensation Fix

A fix has been implemented to allow the selection of a member (in the dropdown) who has not served 12 months as a Warden when using the agenda item 'To elect the WM and Treasurer for the ensuing year. (with a nomination)', if a Dispensation has been requested and approved.

Member Details

‘Age’ Rounding on ‘Update Personal Details’ Window - Fixed

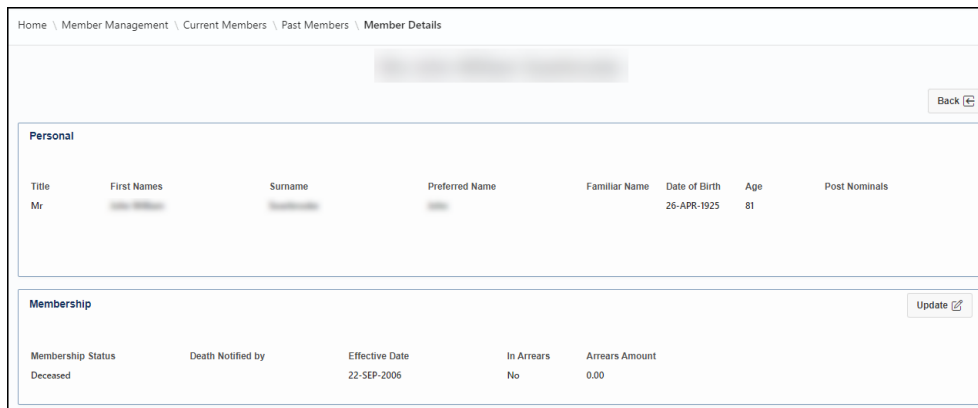
An issue with the rounding of ‘Age’ on the ‘Update Personal Details’ window has been resolved. Previously it was rounding up and so could incorrectly display, despite being correct on the ‘Member Details’ screen.



Title	First Names	Surname	Post Nominals
Mr	John	Moxley	
Preferred Name	Familiar Name	Date of Birth	Age
John		03-JUN-2004	19

‘Age’ of Deceased Members Incorrectly Calculated on ‘Past Members’ Screen - Fixed

A bug has been fixed where the ‘Age’ of a deceased member was incorrectly calculating against the current date, rather than the date that they passed to the Grand Lodge Above.

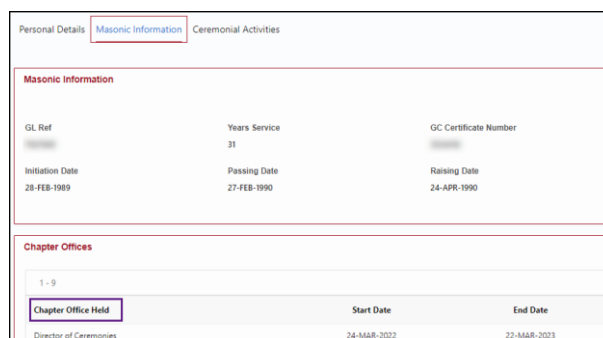


Title	First Names	Surname	Preferred Name	Familiar Name	Date of Birth	Age	Post Nominals
Mr					26-APR-1925	81	

Membership Status	Death Notified by	Effective Date	In Arrears	Arrears Amount
Deceased		22-SEP-2006	No	0.00

Masonic Information tab, Chapter Offices has a Craft heading 'Lodge Office Held' - Fixed

The ‘Chapters Offices’ section of the ‘Member Details’ screen for a Chapter now correctly states ‘Chapter Office Held’, rather than ‘Lodge Office Held’.



GL Ref	Years Service	GC Certificate Number
	31	
Initiation Date	Passing Date	Raising Date
28-FEB-1989	27-FEB-1990	24-APR-1990

Chapter Office Held	Start Date	End Date
Director of Ceremonies	24-MAR-2022	22-MAR-2023