DESKTOP USER GUIDE

Join us in revolutionising Freemasonry for the digital age with our membership app!

Your participation and feedback are crucial. Together, we're creating a tool that will significantly enhance the Masonic experience for years to come.

This is your chance to play a pivotal role in the success of this exciting project.

Portal is the new membership app for UGLE. It aims to coexist with and eventually replace Hermes and Adelphi by incorporating their functionalities into a unified system. This project will roll out in phases, ensuring that members' data is accurate and up-to-date, while improving user engagement through an intuitive interface.

This presentation aims to provide an overview of the membership app interface and its uses.

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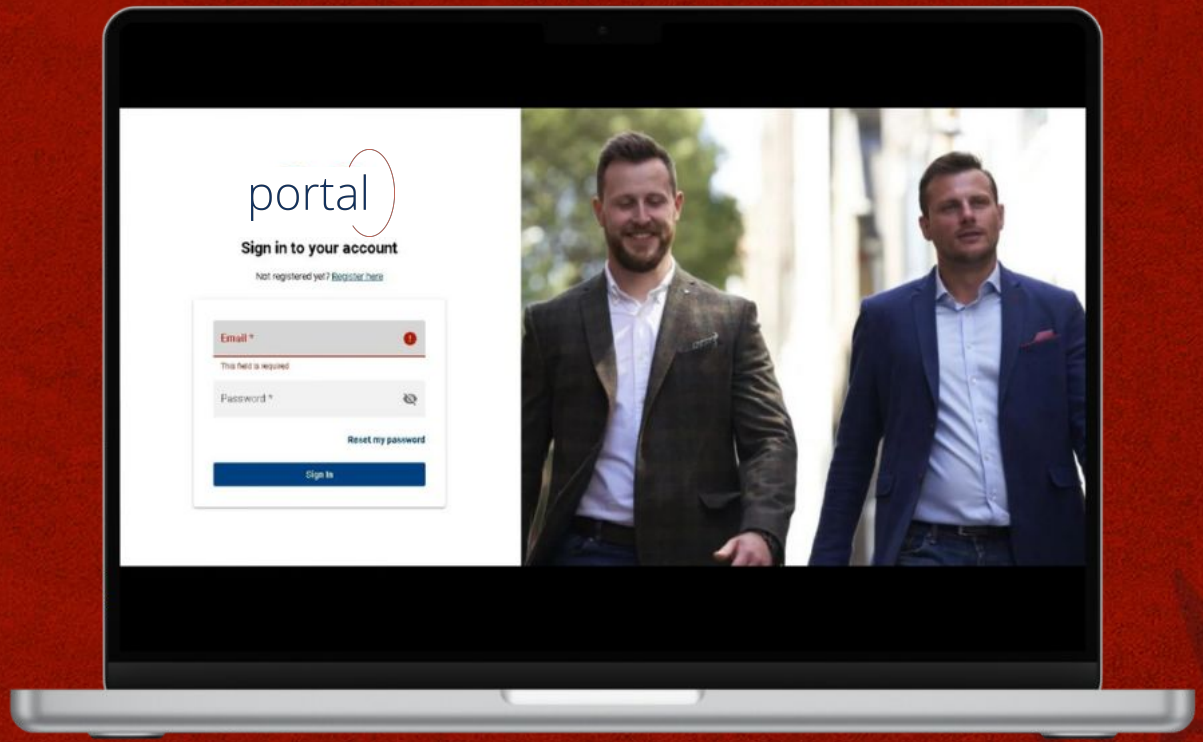


The new membership app will be accessible through both a mobile app and a website. Although some features may be limited to the web platform for administrative users, the goal is to ensure that most functionalities are available to all members on their phones.

How United Grand Lodge of England manage your data

Portal introduces enhanced **privacy controls**, enabling individuals to manage who can view their personal data within their profiles.

Users can adjust visibility settings for various elements, such as contact information and photos, at the Lodge/Chapter, Provincial/District, or global level.

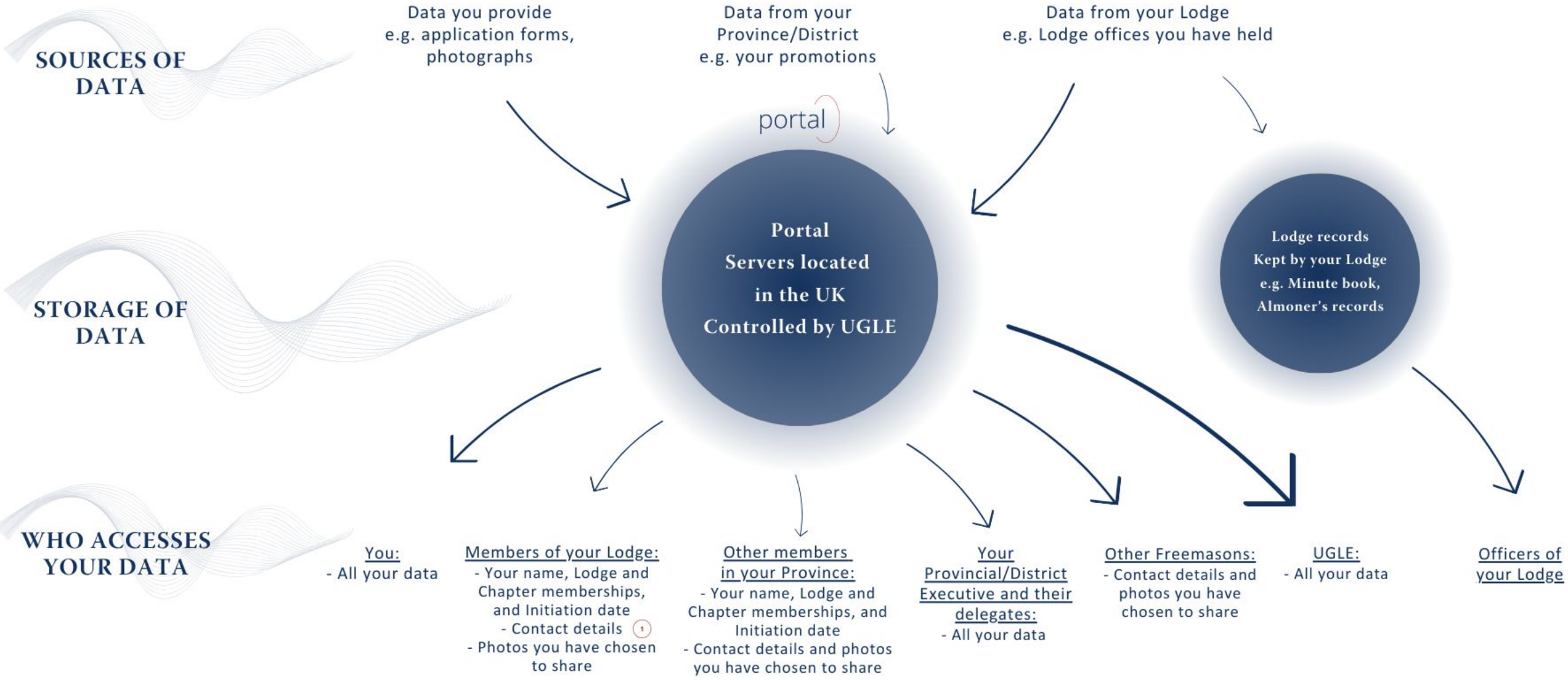
Overall, **the membership app aims to give users greater control over their data privacy**.

portal

UNITED GRAND LODGE OF ENGLAND

How is my data held?

Note: this is an overview showing common data flows, for more detail please see the full data protection notice.



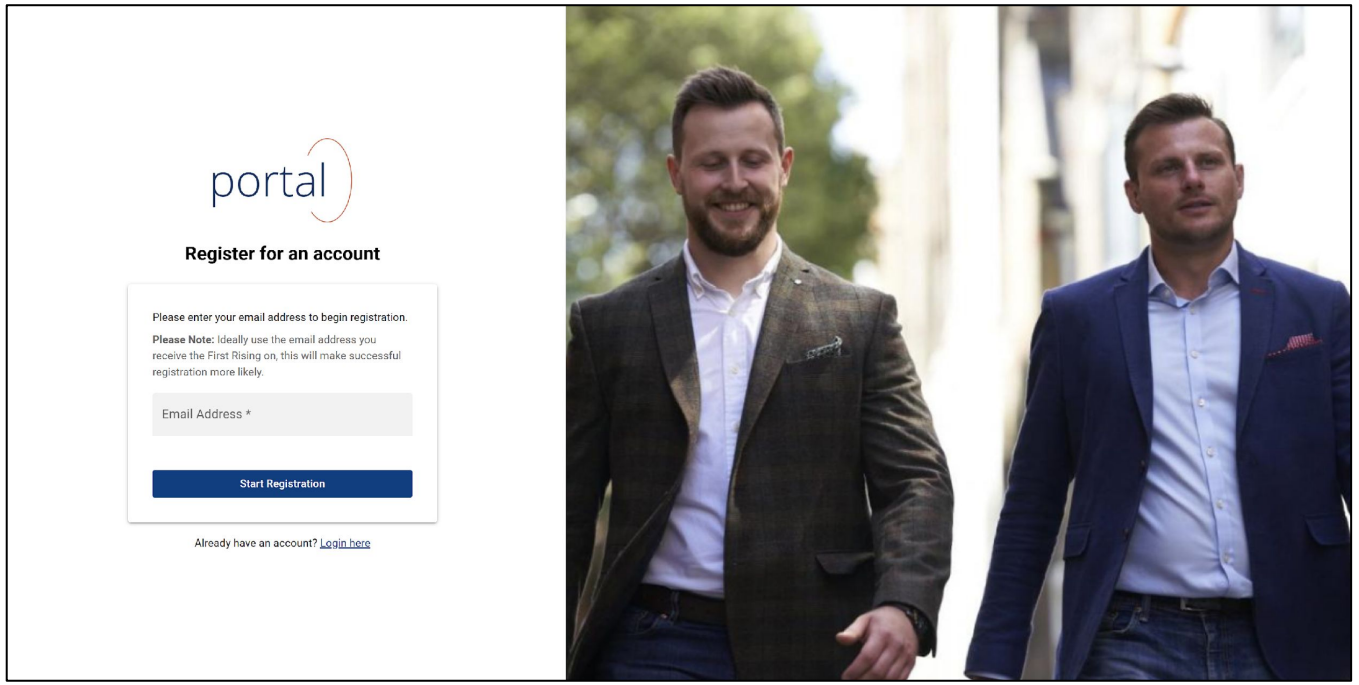
(1) By default, your email address and postal address will be visible but your telephone number will not. You can change your preference at any time.

Registering for the first time

Creating your Portal account in 6 steps

Please use this link to access the **desktop version**:

https://desktop.portal.ugle.org.uk/auth/register



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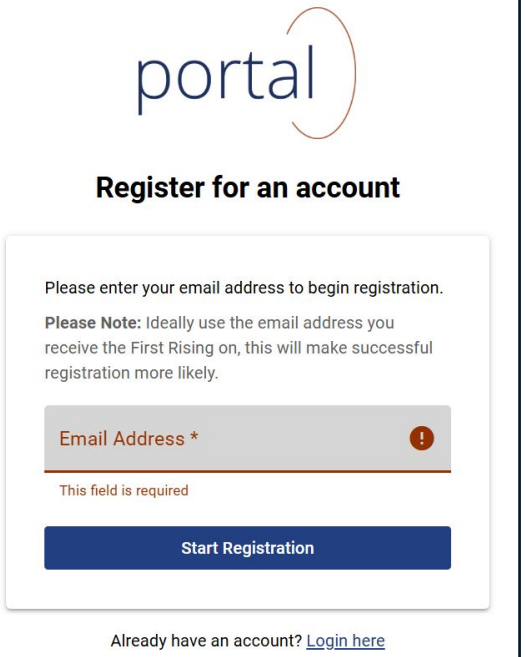
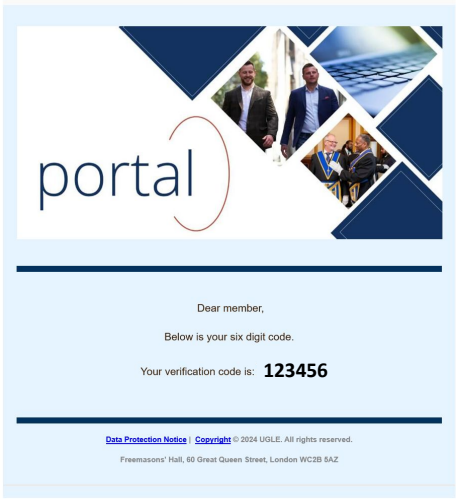
Creating your Portal account in 6 steps

1. Use your email address* to register



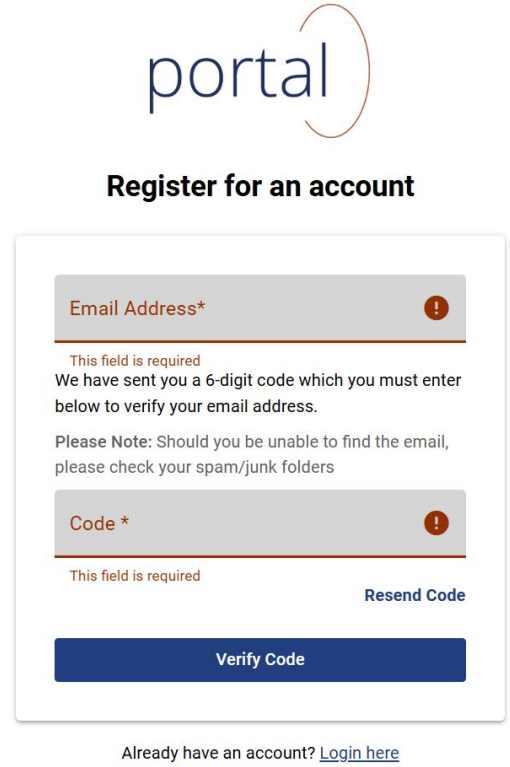
* You must use the email address that UGLE and your Province have on record. This will be the email that you receive *First Rising* to.

2. Check your email for **the 6-digit code sent to you***



* Please check your spam folder for the 6- digit code

3. Use your email address **and the code sent to you**



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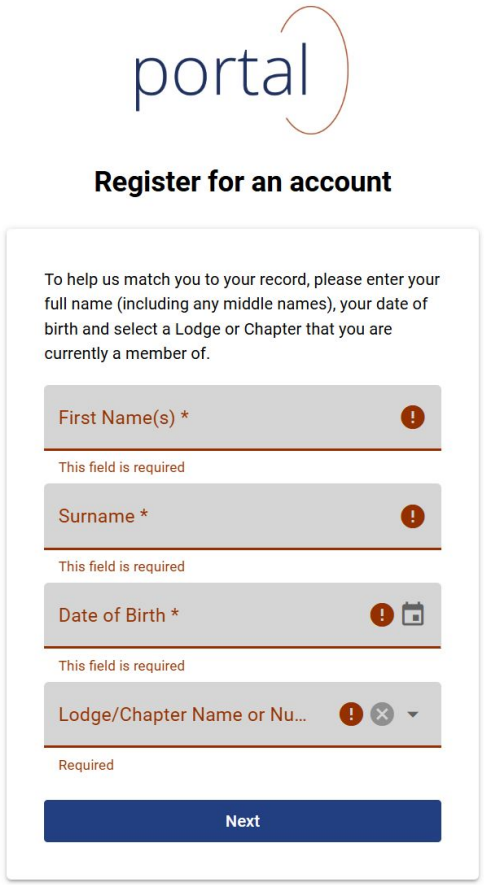
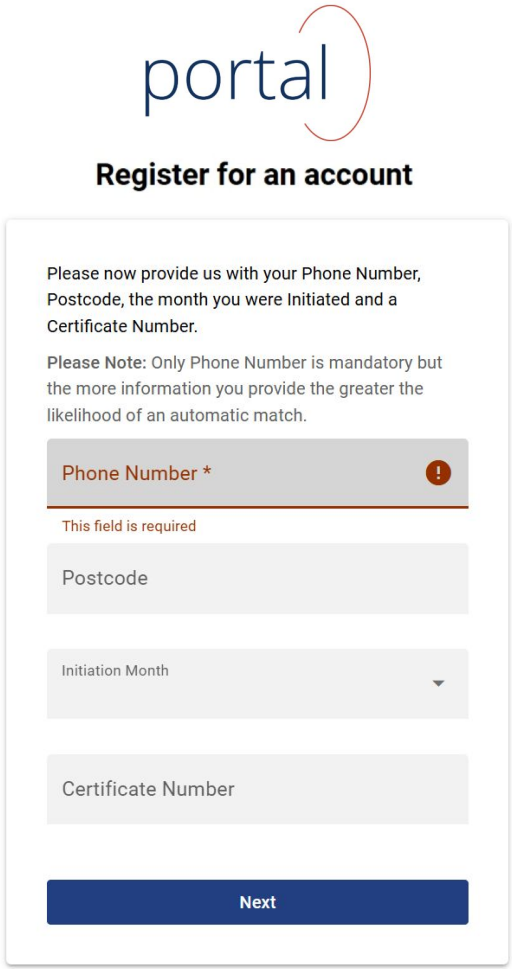
Creating your Portal account in 6 steps

4. Complete each field ensuring you use **ALL** of your names in full and an active Lodge/Chapter in our Province*

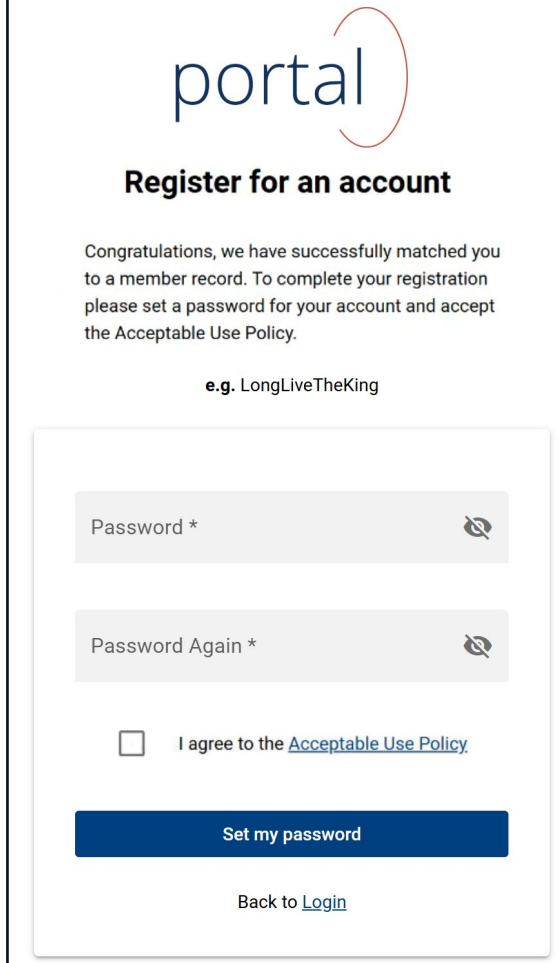


* Please use a Lodge or Chapter in our Province, to which you are a current subscribing member

5. You may be asked to provide additional information



6. Set your password; which you will use every time that you log-in



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Logging into Portal after registration

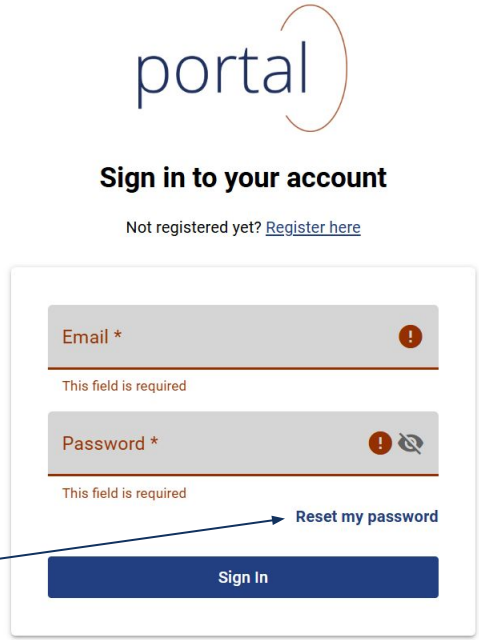
https://desktop.portal.ugle.org.uk

Logging in – post registration

1. Use your registered email address

2. Use the password you chose during the registration process

3. If you have forgotten your password, you can reset it here



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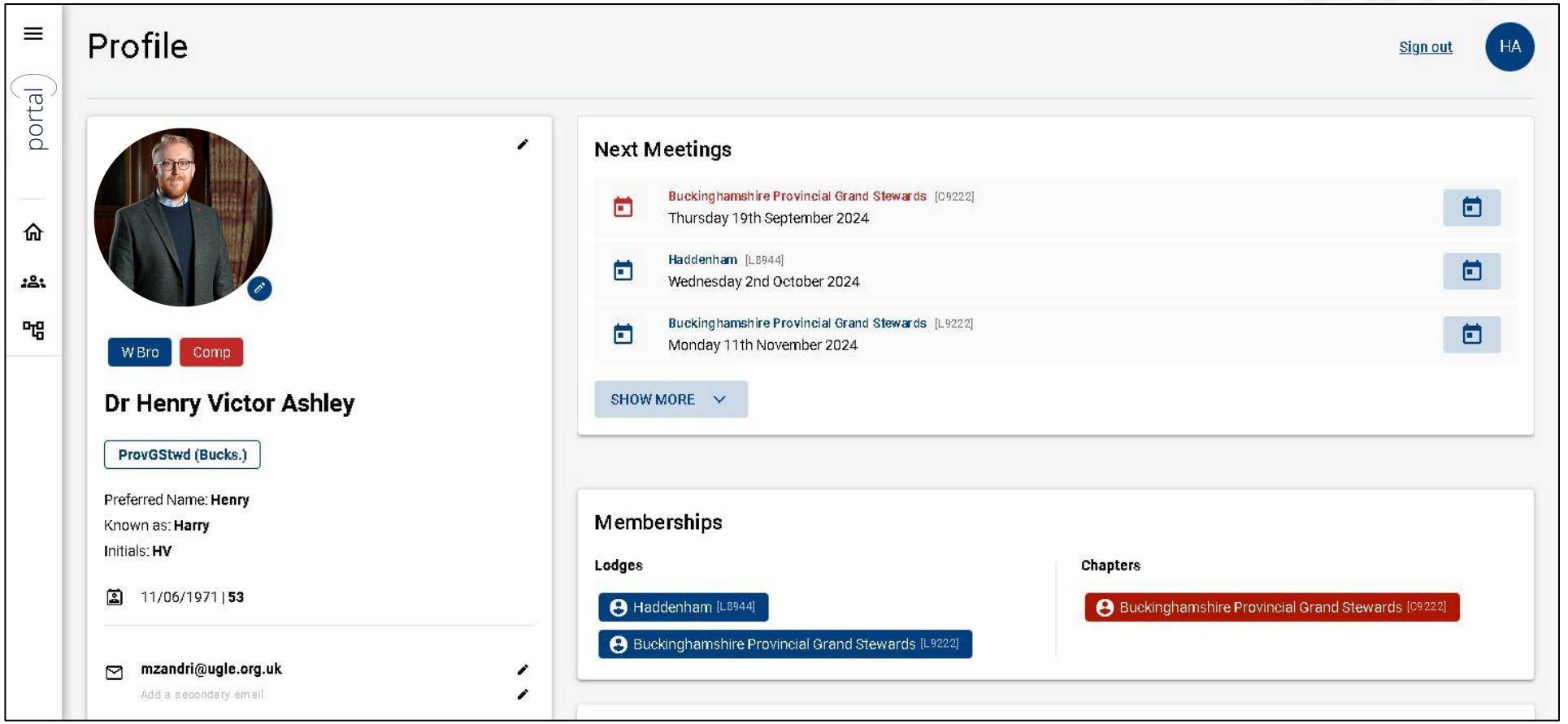
Features and functionality in Portal

This is what your profile page will look like on desktop.

One of the main aims of Portal is to put the **control of data** in the hands of its users.
You can add a **profile photo** and choose a **preferred name**. Please take some time to review your **contact details** to ensure they're up to date.



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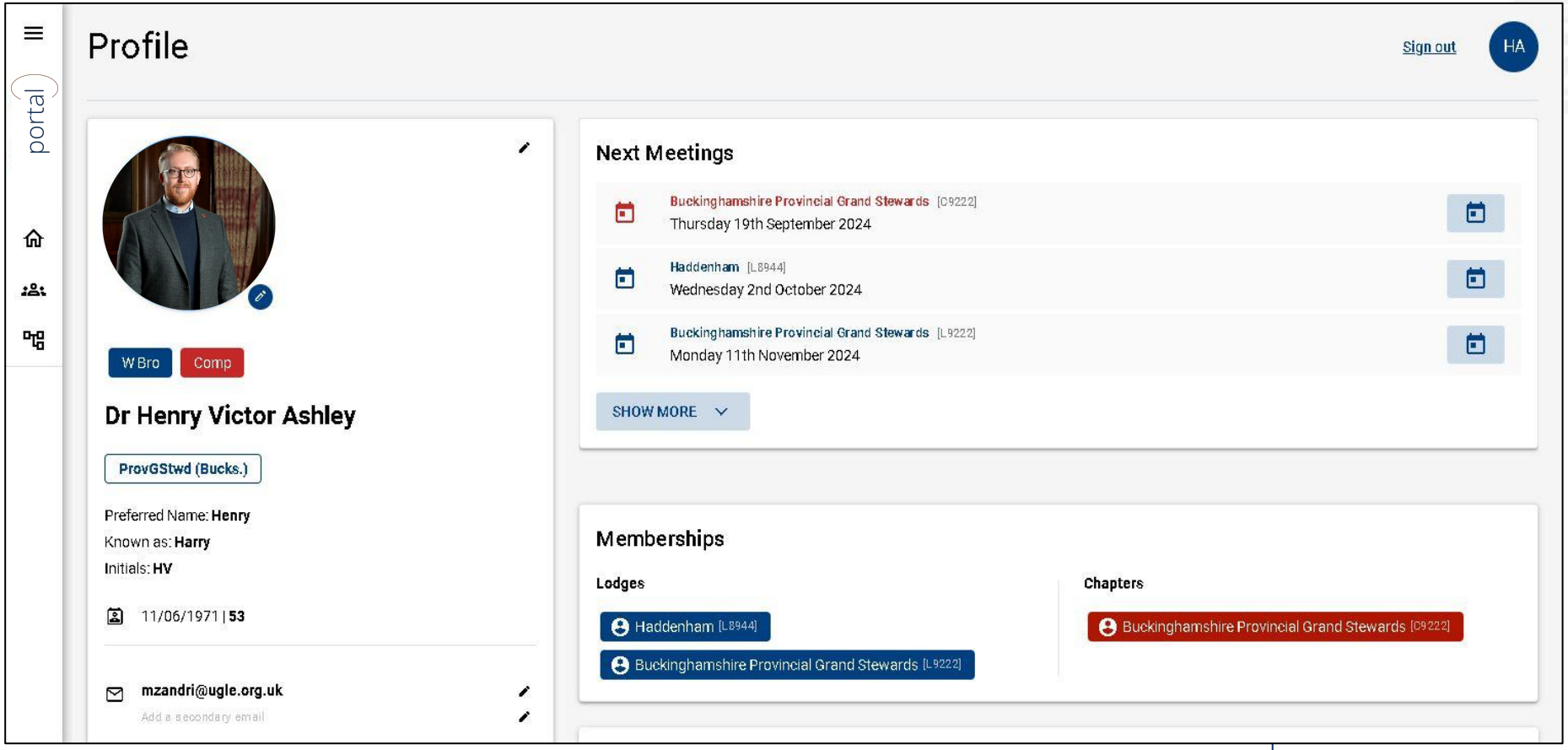

The **'Next Meetings'** section allows easy access to information about upcoming Lodge and Chapter meetings. By clicking on the small calendar icon on the right, you can download an .ics file that automatically adds the event to your personal calendar.

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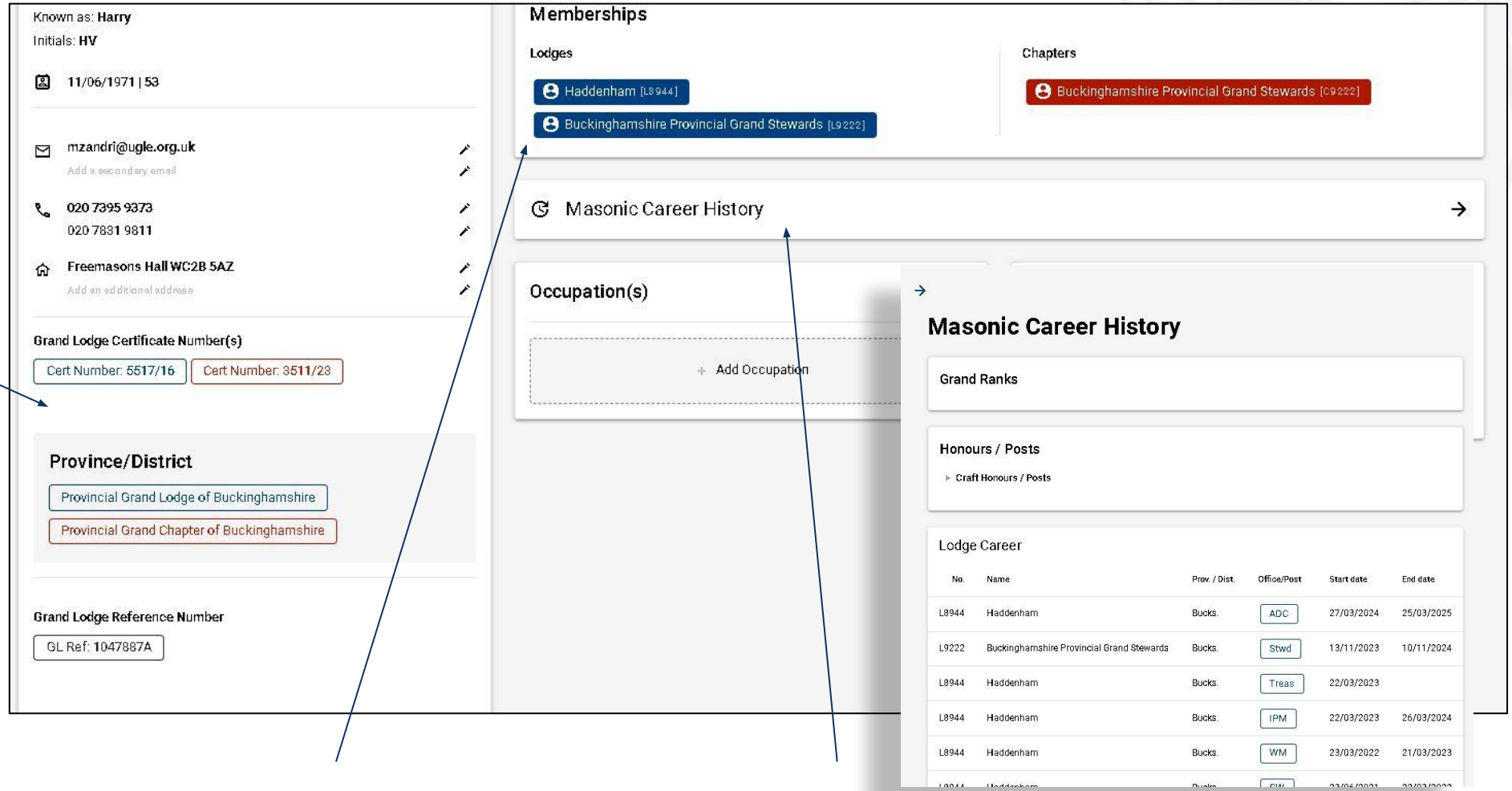
In this section, you'll find information about your **Lodge Certificate Number** and **Provincial/District membership**.



Your **Lodges** and **Chapters memberships** are detailed here.

Review the details of your **Masonic Career History** by clicking here.

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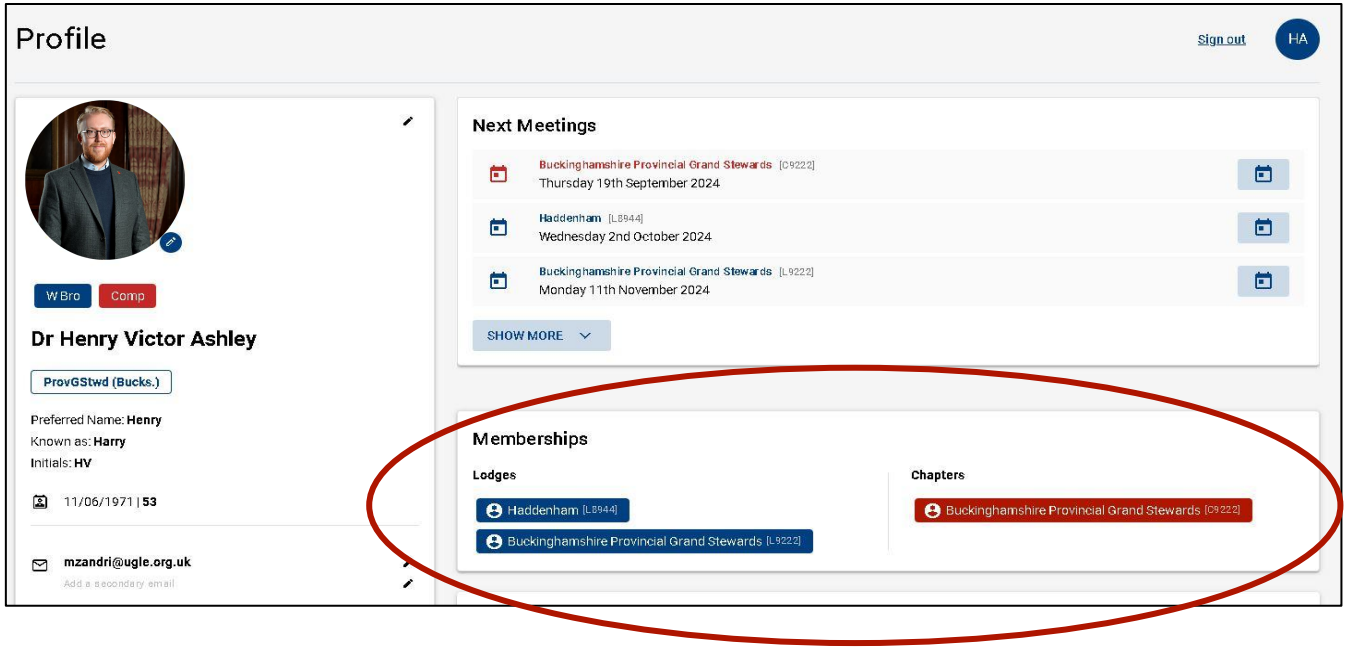

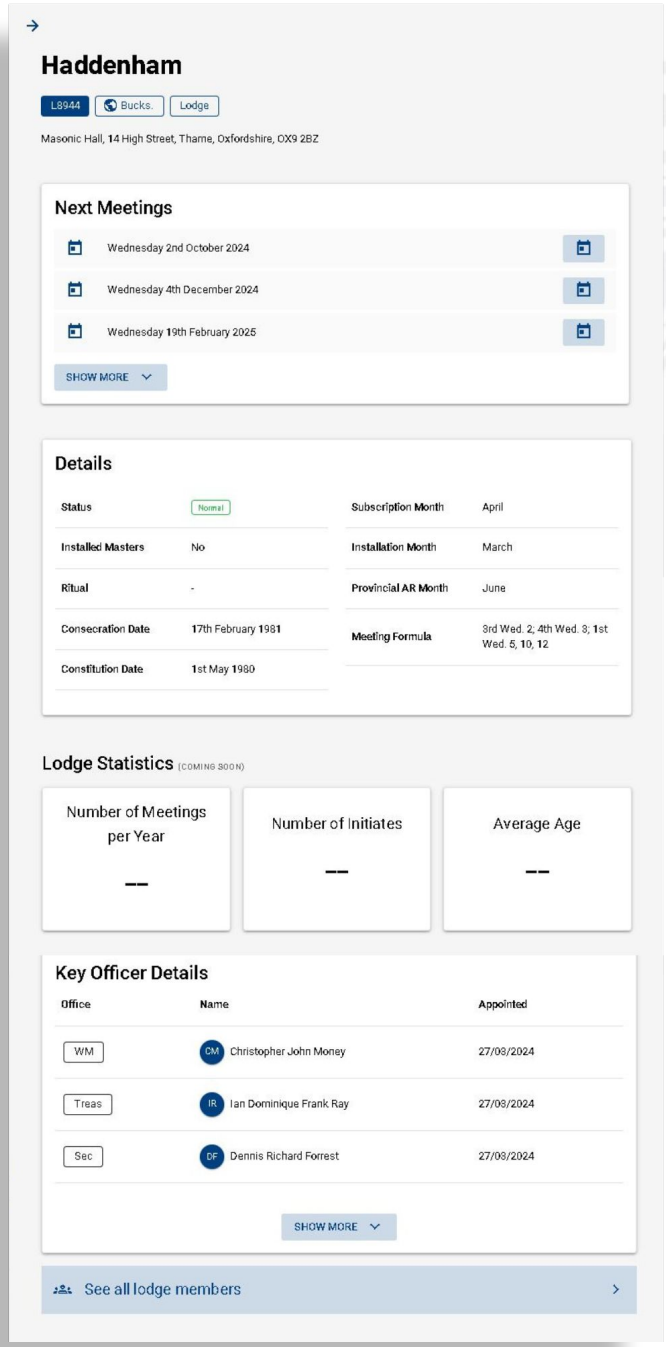

By clicking on your Lodges and Chapters Memberships you'll be able to access information on the **upcoming meetings** and details such as the consecration day and your Lodge/Chapter Officers.

The **names and details** of all **Lodge/Chapter members** can be viewed by clicking on the light blue bar at the bottom.

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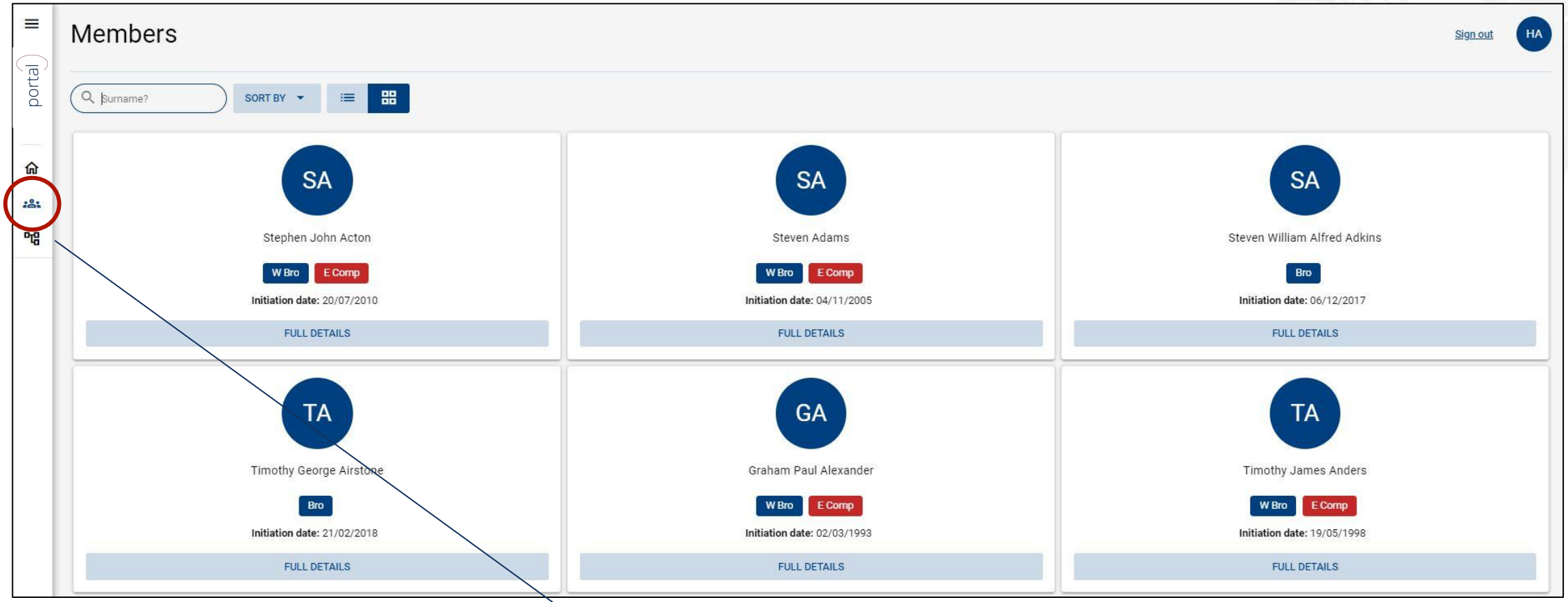

All members details are also easily accessible by clicking on the 'Members' icon located on the left side of your screen.

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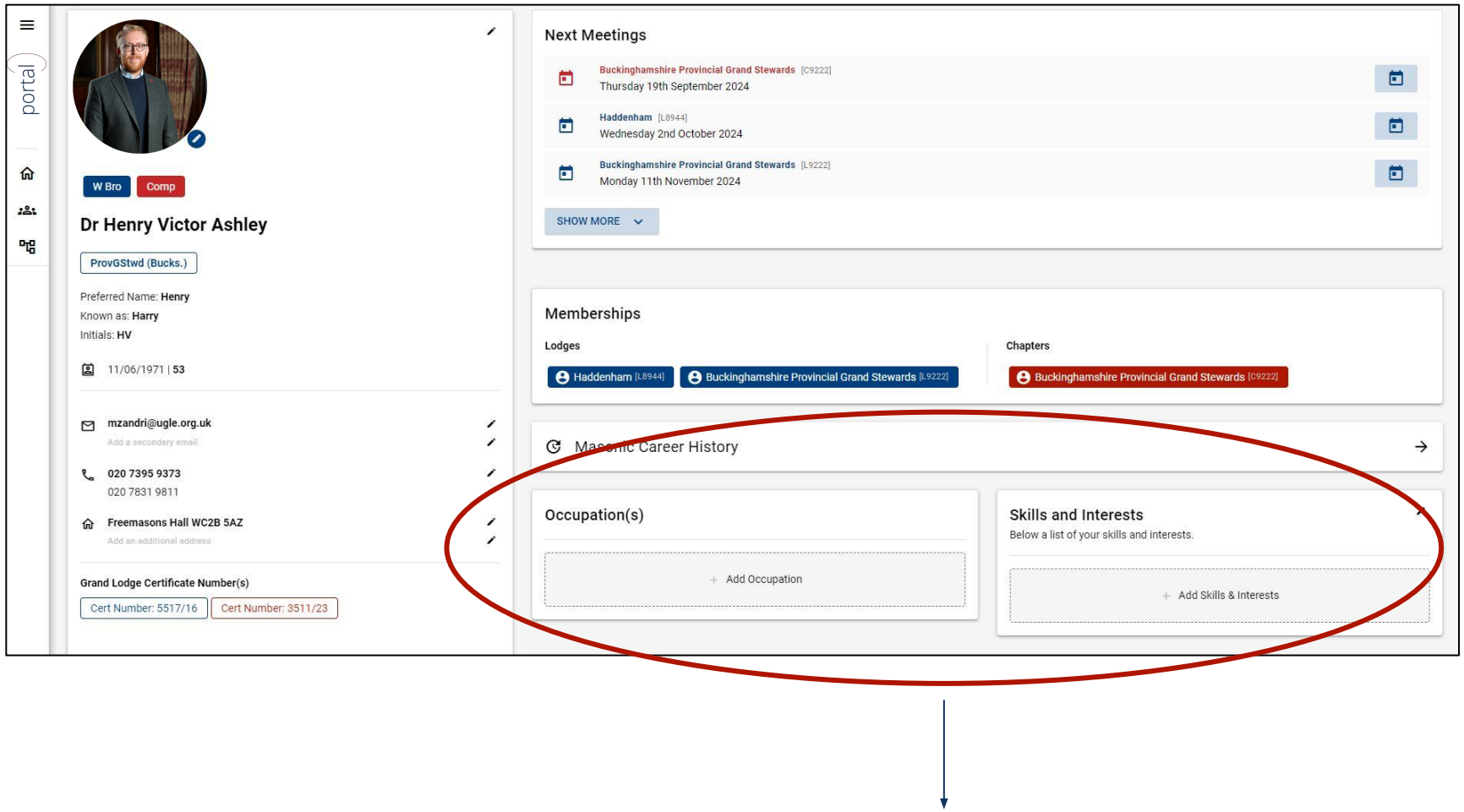
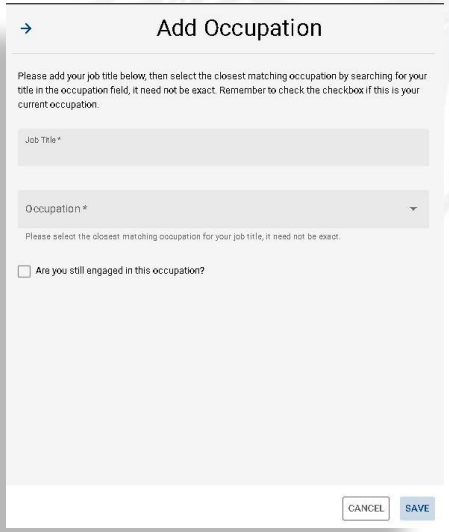
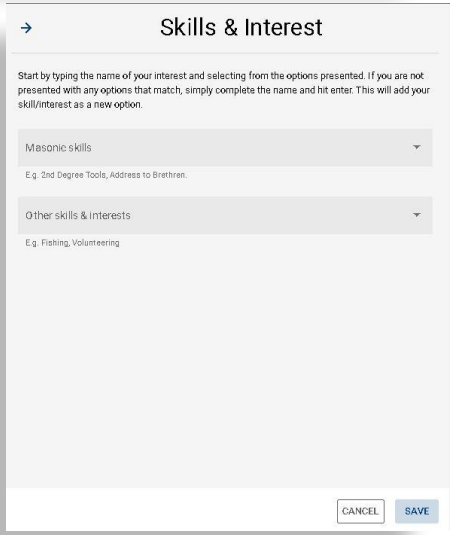
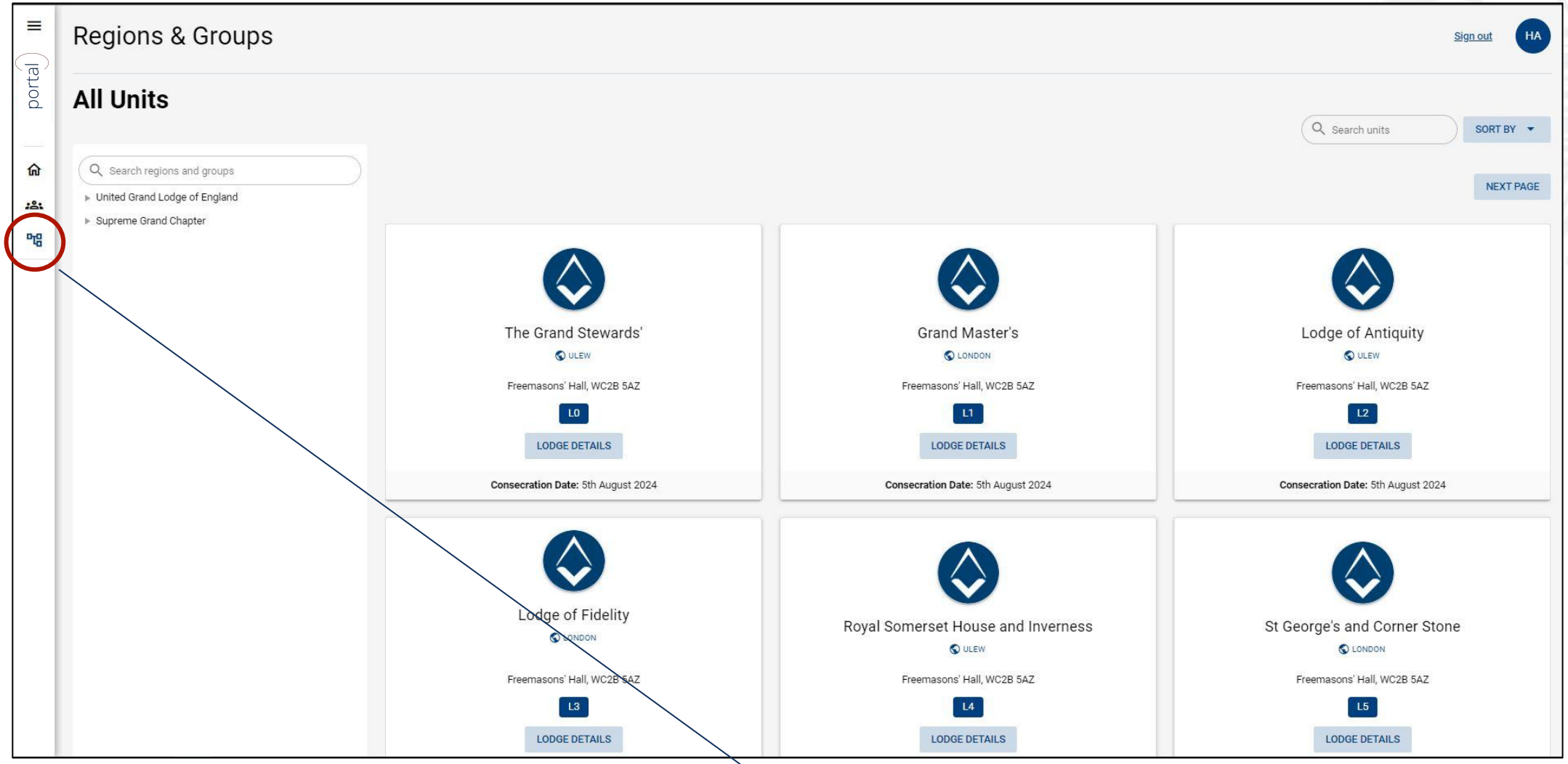






In the **'Occupation(s)'** and **'Skills and Interests'** sections you have the opportunity to share more about yourself. Detailing your current or previous occupation, hobbies, or **favourite piece of ritual** can provide valuable insights for your Lodges and Chapters. This information helps build connections and enhances the shared experience within your community.



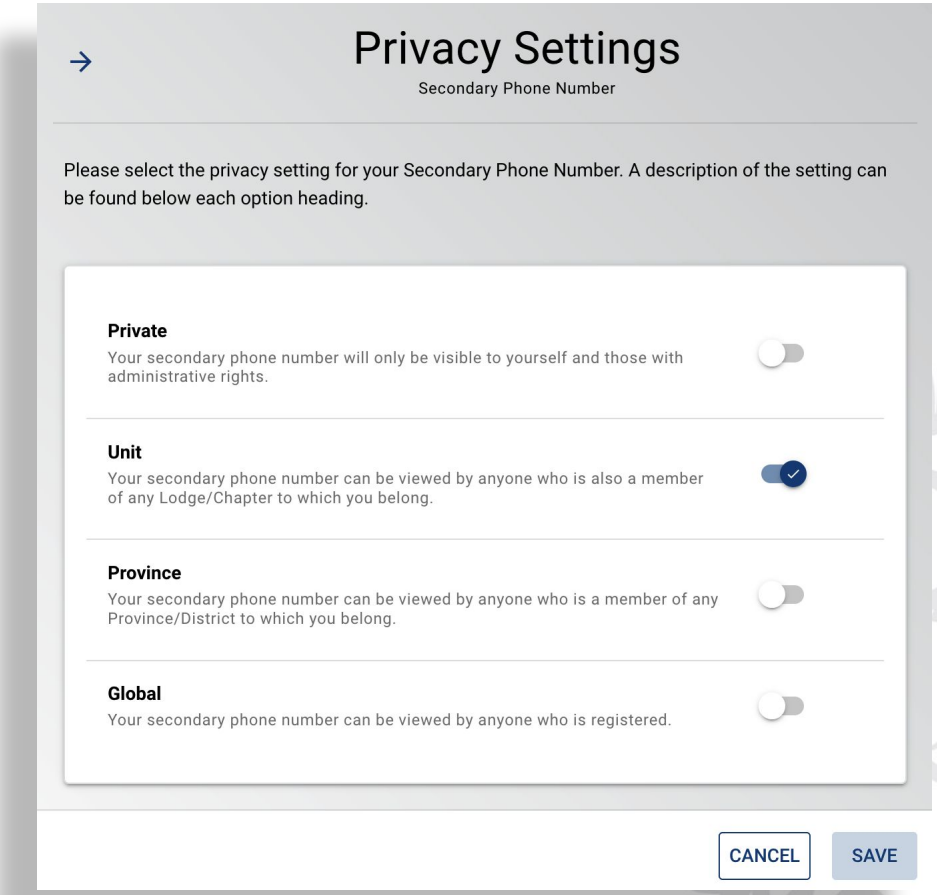
To access details of all UGLE and SGC Lodges and Chapters, click on the **'Regions & Groups'** icon located on the left side of your screen.

Privacy settings

The following data elements are now controlled by additional **privacy settings**:

- Primary Email
- Secondary Email
- Primary Phone
- Secondary Phone
- Primary Address
- Secondary Address
- Photograph

These elements could potentially be visible to others. However, admin users, including local Provincial admin accounts, can access this information regardless of privacy settings.



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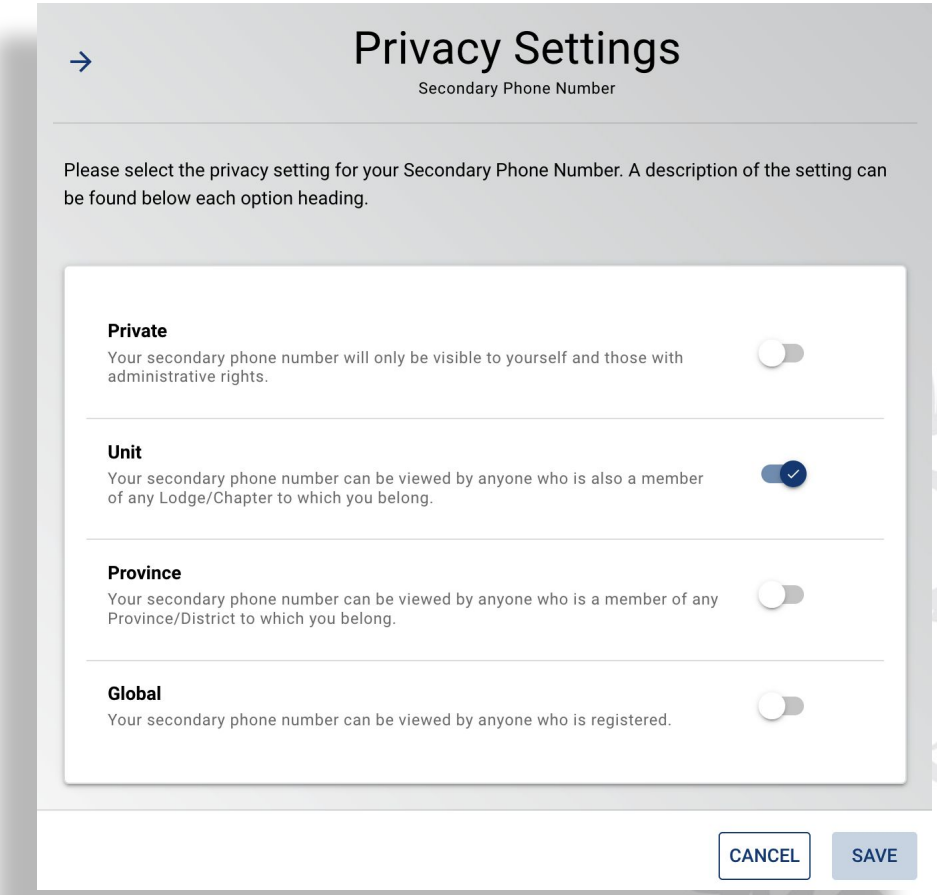
Members have control over the visibility of these data elements through specific **privacy settings**, allowing them to decide what can or cannot be seen by others. Each privacy setting offers four visibility options:

- **Private**
  In this instance the data is only accessible to the member and any admin user
- **Unit**
  In this instance the data is accessible to the member, any admin user and any member of a Lodge/Chapter in which the member is also a member
- **Province**
  In this instance the data is accessible to the member, any admin user and any member of a unit within the same Province (District) as the member
- **Global**
  There is no restriction and the data is available to any member who has logged in



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Thank you!

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