

portal

DESKTOP USER GUIDE



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

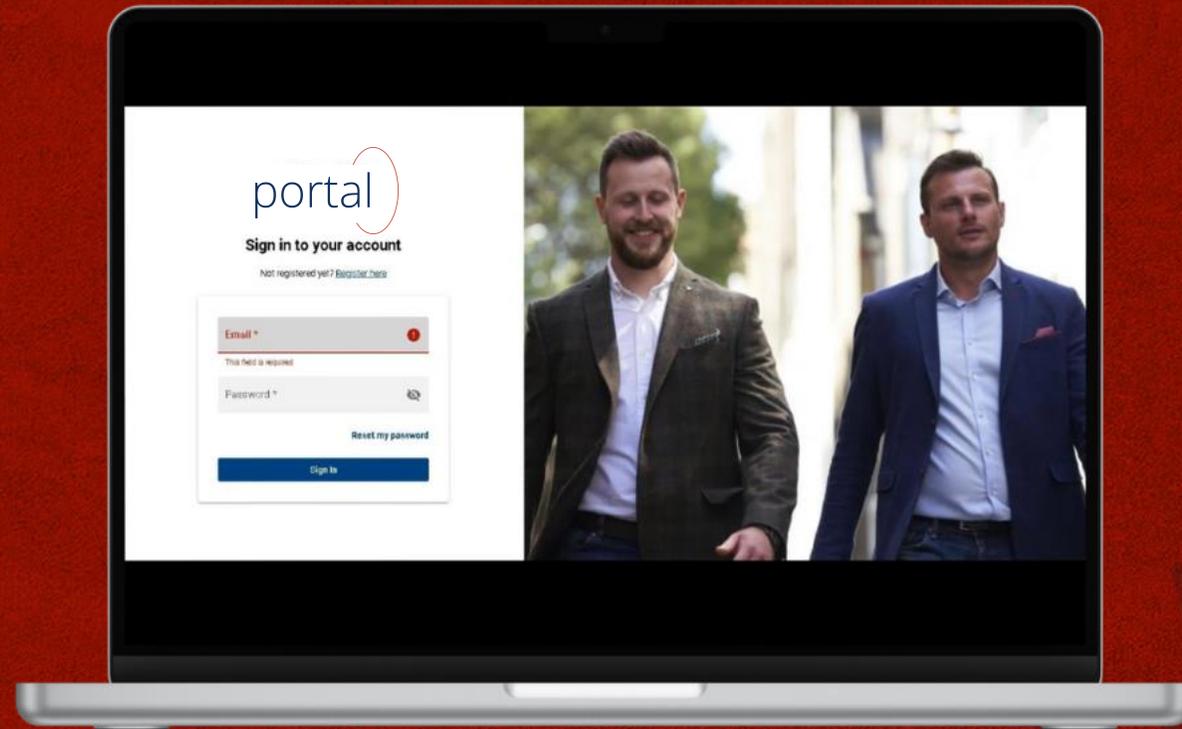
**Your participation and feedback are crucial. Together,
we're creating a tool that will significantly enhance the
Masonic experience for years to come.**

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

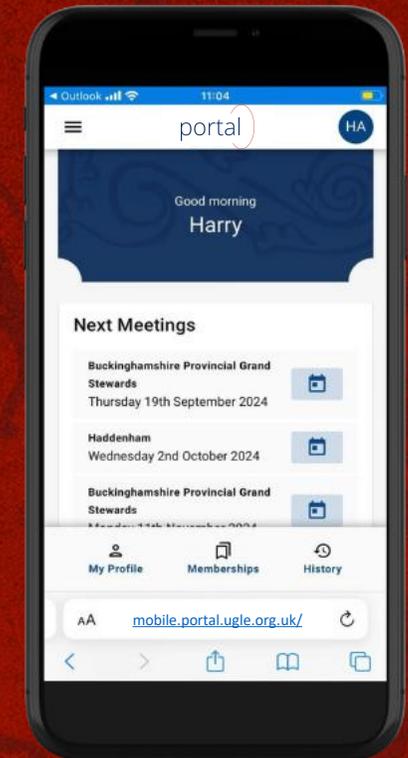
Portal is the new membership app for UGLE. It aims to coexist with and eventually replace Hermes and Adelphi by incorporating their functionalities into a unified system. This project will roll out in phases, ensuring that members' data is accurate and up-to-date, while improving user engagement through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

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





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.

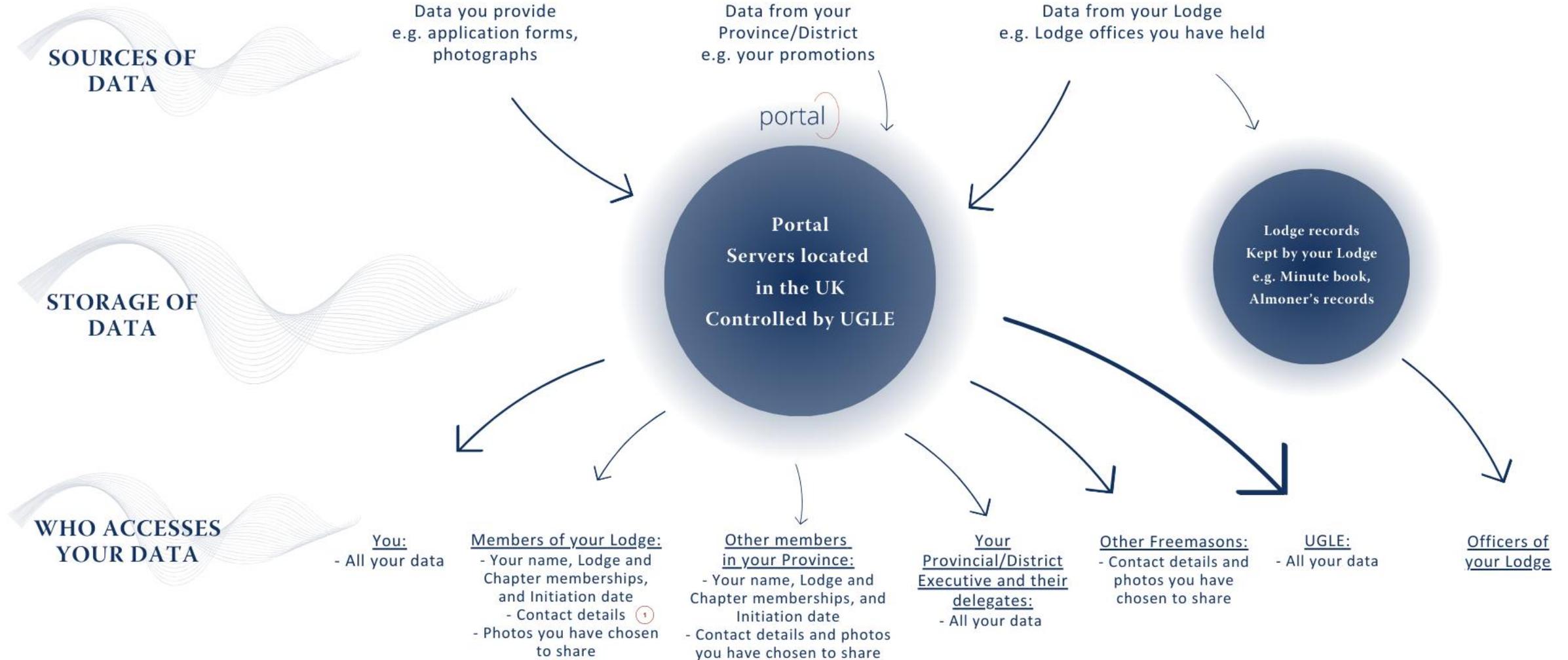
Users can adjust visibility settings for various elements, such as contact information and photos, at the Lodge/Chapter, Provincial/District, or global level.

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



How is my data held?

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



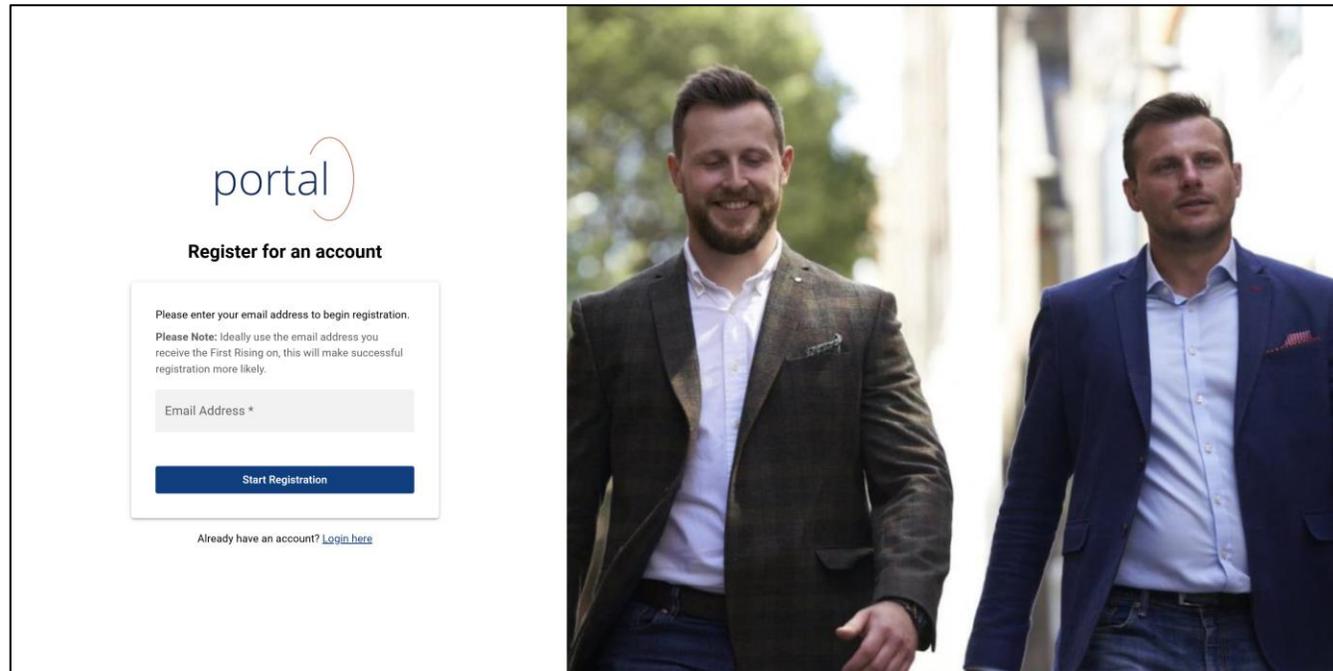
^① By default, your email address and postal address will be visible but your telephone number will not. You can change your preference at any time.

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>



Creating your Portal account in 6 steps

1. Use your email address* to register



Register for an account

Please enter your email address to begin registration.

Please Note: Ideally use the email address you receive the First Rising on, this will make successful registration more likely.

Email Address *

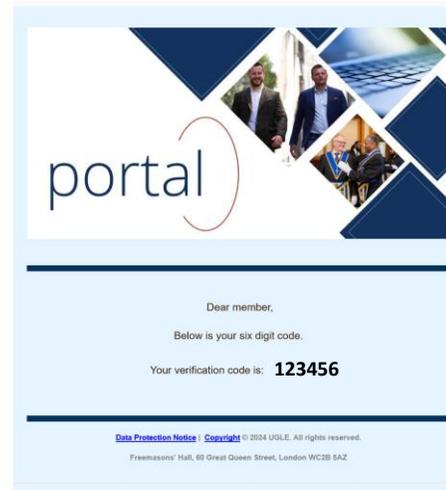
This field is required

Start Registration

Already have an account? [Login here](#)

* 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



Register for an account

Email Address*

This field is required

We have sent you a 6-digit code which you must enter below to verify your email address.

Please Note: Should you be unable to find the email, please check your spam/junk folders

Code *

This field is required

[Resend Code](#)

Verify Code

Already have an account? [Login here](#)



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*



Register for an account

To help us match you to your record, please enter your full name (including any middle names), your date of birth and select a Lodge or Chapter that you are currently a member of.

First Name(s) *

This field is required

Surname *

This field is required

Date of Birth *

This field is required

Lodge/Chapter Name or Nu... *

Required

Next

* 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



Register for an account

Please now provide us with your Phone Number, Postcode, the month you were Initiated and a Certificate Number.

Please Note: Only Phone Number is mandatory but the more information you provide the greater the likelihood of an automatic match.

Phone Number *

This field is required

Postcode

Initiation Month

Certificate Number

Next

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



Register for an account

Congratulations, we have successfully matched you to a member record. To complete your registration please set a password for your account and accept the Acceptable Use Policy.

e.g. LongLiveTheKing

Password *

Password Again *

I agree to the [Acceptable Use Policy](#)

Set my password

Back to [Login](#)



Logging into Portal after registration

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

Logging in – post registration



Sign in to your account

Not registered yet? [Register here](#)

- 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

The screenshot shows a sign-in form with the following elements:

- An "Email *" input field with a red exclamation mark icon and the text "This field is required" below it.
- A "Password *" input field with a red exclamation mark icon, a red eye icon, and the text "This field is required" below it.
- A "Reset my password" link below the password field.
- A blue "Sign In" button at the bottom.



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.

The screenshot shows a desktop view of a user's profile page in the Portal system. The page is titled "Profile" and features a navigation sidebar on the left with icons for home, contacts, and a grid. The main content area is divided into several sections:

- Profile Photo:** A circular profile picture of a man with glasses and a beard, wearing a suit. A small "edit" icon is visible to the right of the photo.
- Badges:** Two badges are displayed below the photo: "W Bro" (blue) and "Comp" (red).
- Name:** The name "Dr Henry Victor Ashley" is prominently displayed.
- Role:** A badge for "ProvGSTwd (Bucks.)" is shown below the name.
- Personal Information:** Fields for "Preferred Name: Henry", "Known as: Harry", and "Initials: HV" are listed.
- Birth Date:** A field showing "11/06/1971 | 53" with a calendar icon.
- Contact:** An email field showing "mzandri@ugle.org.uk" with an "Add a secondary email" link and an edit icon.
- Next Meetings:** A section titled "Next Meetings" containing three entries:
 - "Buckinghamshire Provincial Grand Stewards [C9222]" on Thursday 19th September 2024.
 - "Haddenham [L.8944]" on Wednesday 2nd October 2024.
 - "Buckinghamshire Provincial Grand Stewards [L.9222]" on Monday 11th November 2024.A "SHOW MORE" button is located below the list.
- Memberships:** A section titled "Memberships" with two sub-sections:
 - Lodges:** Two entries: "Haddenham [L.8944]" and "Buckinghamshire Provincial Grand Stewards [L.9222]".
 - Chapters:** One entry: "Buckinghamshire Provincial Grand Stewards [C9222]".

portal

Profile

Sign out HA

W Bro Comp

Dr Henry Victor Ashley

ProvGStwd (Bucks.)

Preferred Name: Henry
Known as: Harry
Initials: HV

11/06/1971 | 53

mzandri@ugle.org.uk
Add a secondary email

Next Meetings

- Buckinghamshire Provincial Grand Stewards [C9222]
Thursday 19th September 2024
- Haddenham [L8944]
Wednesday 2nd October 2024
- Buckinghamshire Provincial Grand Stewards [L9222]
Monday 11th November 2024

SHOW MORE

Memberships

Lodges

- Haddenham [L8944]
- Buckinghamshire Provincial Grand Stewards [L9222]

Chapters

- Buckinghamshire Provincial Grand Stewards [C9222]

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.

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

Memberships

Lodges

- Haddenham [L9944]
- Buckinghamshire Provincial Grand Stewards [L9222]

Chapters

- Buckinghamshire Provincial Grand Stewards [09222]

Masonic Career History

Occupation(s)

+ Add Occupation

Masonic Career History

Grand Ranks

Honours / Posts

- Craft Honours / Posts

Lodge Career

No.	Name	Prov. / Dist.	Office/Post	Start date	End date
L8944	Haddenham	Bucks.	ADC	27/03/2024	25/03/2025
L9222	Buckinghamshire Provincial Grand Stewards	Bucks.	Stwd	13/11/2023	10/11/2024
L8944	Haddenham	Bucks.	Treas	22/03/2023	
L8944	Haddenham	Bucks.	IPM	22/03/2023	26/03/2024
L8944	Haddenham	Bucks.	WM	23/03/2022	21/03/2023

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

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

Profile Sign out HA



Dr Henry Victor Ashley

ProvGStwd (Bucks.)

Preferred Name: Henry
Known as: Harry
Initials: HV

11/06/1971 | 53

mzandri@ugle.org.uk

Next Meetings

- Buckinghamshire Provincial Grand Stewards [09222]
Thursday 19th September 2024
- Haddenham [L0944]
Wednesday 2nd October 2024
- Buckinghamshire Provincial Grand Stewards [L9222]
Monday 11th November 2024

Memberships

Lodges

- Haddenham [L0944]
- Buckinghamshire Provincial Grand Stewards [L9222]

Chapters

- Buckinghamshire Provincial Grand Stewards [09222]

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.

portal

Haddenham

L0944 Bucks Lodge

Masonic Hall, 14 High Street, Thame, Oxfordshire, OX9 2BZ

Next Meetings

- Wednesday 2nd October 2024
- Wednesday 4th December 2024
- Wednesday 19th February 2025

Details

Status	Normal	Subscription Month	April
Installed Masters	No	Installation Month	March
Ritual	-	Provincial AR Month	June
Consecration Date	17th February 1981	Meeting Formula	3rd Wed, 2, 4th Wed, 3, 1st Wed, 5, 10, 12
Constitution Date	1st May 1980		

Lodge Statistics (COMING SOON)

Number of Meetings per Year	Number of Initiates	Average Age
--	--	--

Key Officer Details

Office	Name	Appointed
WM	DM Christopher John Money	27/09/2024
Treas	IR Ian Dominique Frank Ray	27/09/2024
Sec	GP Dennis Richard Forrest	27/09/2024

[See all lodge members](#)

Members

portal

Sign out HA

Search: surname? SORT BY

Name	Role	Initiation date
Stephen John Acton	W Bro, E Comp	20/07/2010
Steven Adams	W Bro, E Comp	04/11/2005
Steven William Alfred Adkins	Bro	06/12/2017
Timothy George Airstone	Bro	21/02/2018
Graham Paul Alexander	W Bro, E Comp	02/03/1993
Timothy James Anders	W Bro, E Comp	19/05/1998

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

portal

W Bro Comp

Dr Henry Victor Ashley

ProvGStwd (Bucks.)

Preferred Name: Henry
Known as: Harry
Initials: HV

11/06/1971 | 53

mzandri@ugle.org.uk
Add a secondary email

020 7395 9373
020 7831 9811

Freemasons Hall WC2B 5AZ
Add an additional address

Grand Lodge Certificate Number(s)
Cert Number: 5517/16 Cert Number: 3511/23

Next Meetings

- Buckinghamshire Provincial Grand Stewards [C9222]
Thursday 19th September 2024
- Haddenham [L8944]
Wednesday 2nd October 2024
- Buckinghamshire Provincial Grand Stewards [L9222]
Monday 11th November 2024

SHOW MORE

Memberships

Lodges: Haddenham [L8944] Buckinghamshire Provincial Grand Stewards [L9222]

Chapters: Buckinghamshire Provincial Grand Stewards [C9222]

Masonic Career History

Occupation(s)
+ Add Occupation

Skills and Interests
Below a list of your skills and interests.
+ Add Skills & Interests

Add Occupation

Please add your job title below, then select the closest matching occupation by searching for your title in the occupation field, it need not be exact. Remember to check the checkbox if this is your current occupation.

Job Title *

Occupation *

Please select the closest matching occupation for your job title, it need not be exact.

Are you still engaged in this occupation?

CANCEL SAVE

Skills & Interest

Start by typing the name of your interest and selecting from the options presented. If you are not presented with any options that match, simply complete the name and hit enter. This will add your skill/interest as a new option.

Masonic skills
E.g. 2nd Degree Tools, Address to Brethren.

Other skills & interests
E.g. Fishing, Volunteering

CANCEL SAVE

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.

The screenshot displays the 'Regions & Groups' section of a portal. On the left, a vertical navigation bar contains icons for 'portal', home, and a 'Regions & Groups' icon (a grid of four squares) which is circled in red. An arrow points from this icon to the explanatory text below. The main content area is titled 'All Units' and features a search bar, a 'SORT BY' dropdown, and a 'NEXT PAGE' button. Below these are two expandable sections: 'United Grand Lodge of England' and 'Supreme Grand Chapter'. The main area contains six lodge cards, each with a logo, name, location, level, and a 'LODGE DETAILS' button. The lodges are: 'The Grand Stewards' (ULEW, L0), 'Grand Master's' (LONDON, L1), 'Lodge of Antiquity' (ULEW, L2), 'Lodge of Fidelity' (LONDON, L3), 'Royal Somerset House and Inverness' (ULEW, L4), and 'St George's and Corner Stone' (LONDON, L5). All lodges are located at 'Freemasons' Hall, WC2B 5AZ' and have a 'Consecration Date: 5th August 2024'.

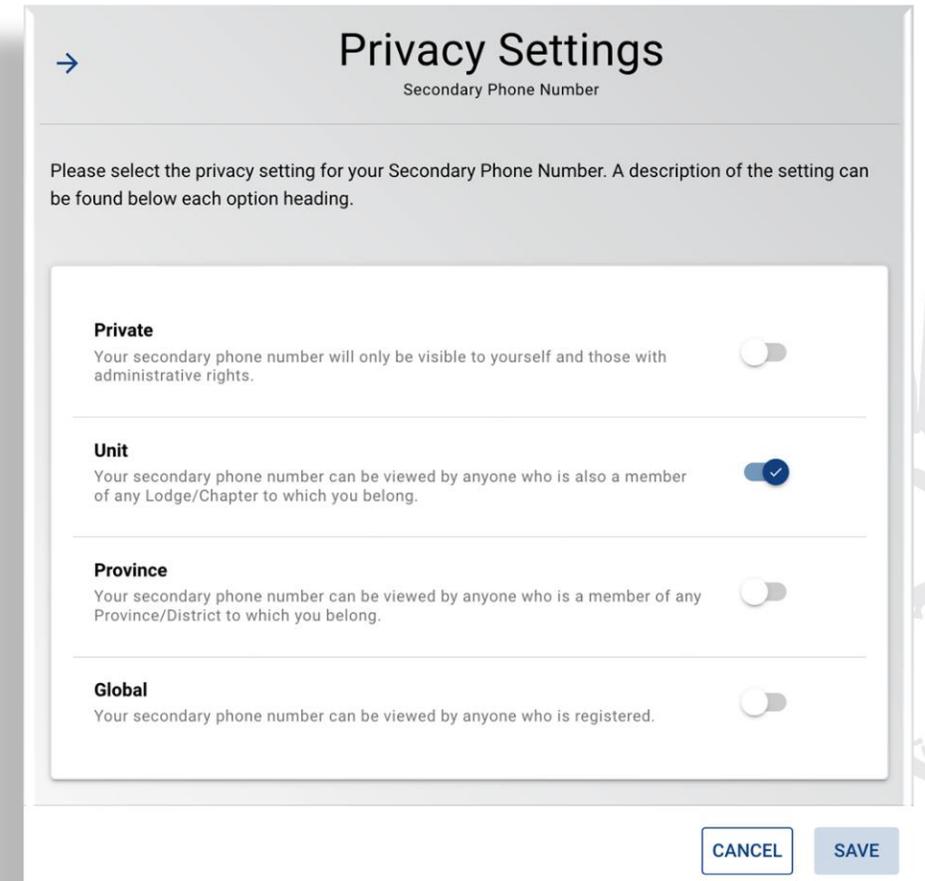
To access details of all UGLE and SGC Lodges and Chapters, click on the 'Regions & Groups' icon located on the left side of your screen.

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.



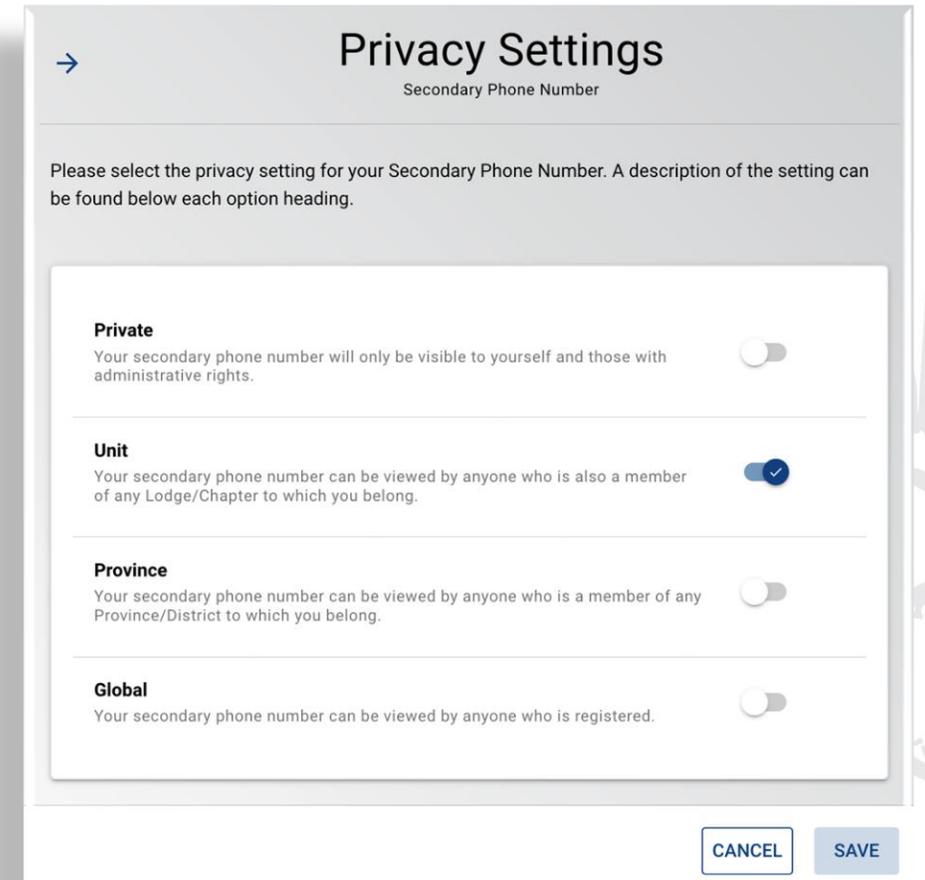
The screenshot shows a 'Privacy Settings' dialog box for a 'Secondary Phone Number'. It features a title bar with a back arrow and the title 'Privacy Settings' and subtitle 'Secondary Phone Number'. Below the title bar is a descriptive text: 'Please select the privacy setting for your Secondary Phone Number. A description of the setting can be found below each option heading.' The main content area contains four settings, each with a heading, a description, and a toggle switch:

- Private**: Your secondary phone number will only be visible to yourself and those with administrative rights. (Toggle is off)
- Unit**: Your secondary phone number can be viewed by anyone who is also a member of any Lodge/Chapter to which you belong. (Toggle is on, indicated by a blue checkmark)
- Province**: Your secondary phone number can be viewed by anyone who is a member of any Province/District to which you belong. (Toggle is off)
- Global**: Your secondary phone number can be viewed by anyone who is registered. (Toggle is off)

At the bottom right of the dialog are two buttons: 'CANCEL' and 'SAVE'.

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



Privacy Settings
Secondary Phone Number

Please select the privacy setting for your Secondary Phone Number. A description of the setting can be found below each option heading.

Private Your secondary phone number will only be visible to yourself and those with administrative rights.	<input type="checkbox"/>
Unit Your secondary phone number can be viewed by anyone who is also a member of any Lodge/Chapter to which you belong.	<input checked="" type="checkbox"/>
Province Your secondary phone number can be viewed by anyone who is a member of any Province/District to which you belong.	<input type="checkbox"/>
Global Your secondary phone number can be viewed by anyone who is registered.	<input type="checkbox"/>

Thank you!

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

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

portal

