portal

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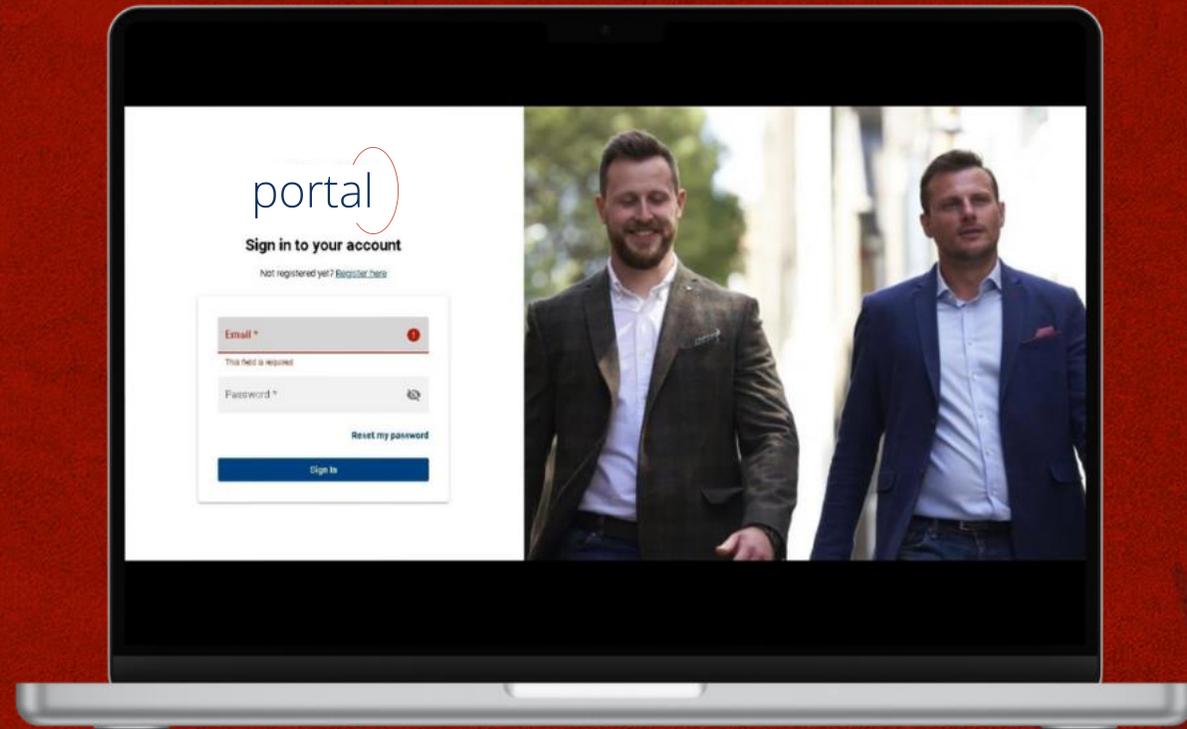
The new membership app will be accessible through both a mobile app and a website. Although some features may be limited to the web platform for administrative users, the goal is to ensure that most functionalities are available to all members on their phones.

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**.

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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.

SOURCES OF DATA

Data you provide
e.g. application forms,
photographs

Data from your
Province/District
e.g. your promotions

Data from your Lodge
e.g. Lodge offices you have held

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STORAGE OF DATA

Portal
Servers located
in the UK
Controlled by UGLE

Lodge records
Kept by your Lodge
e.g. Minute book,
Almoner's records

WHO ACCESSES YOUR DATA

You:
- All your data

Members of your Lodge:
- Your name, Lodge and
Chapter memberships,
and Initiation date
- Contact details ①
- Photos you have chosen
to share

Other members
in your Province:
- Your name, Lodge and
Chapter memberships, and
Initiation date
- Contact details and photos
you have chosen to share

Your
Provincial/District
Executive and their
delegates:
- All your data

Other Freemasons:
- Contact details and
photos you have
chosen to share

UGLE:
- All your data

Officers of
your Lodge

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 **mobile version**:

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

Or scan the **QR code** below:

portal

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***

Dear member,

Below is your six digit code.

Your verification code is: **123456**

Data Protection Notice | Copyright © 2024 UGLE. All rights reserved.
Freemasons' Hall, 60 Great Queen Street, London WC2B 5AZ
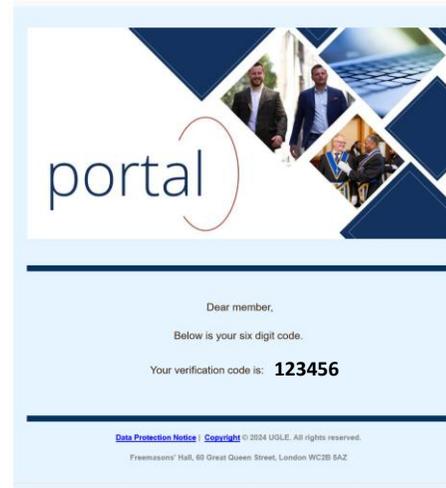
* Please check your spam folder for the 6- digit code

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*

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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

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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

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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

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Logging into Portal after registration

Logging into Portal

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

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

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Logging into Portal

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

Creating a shortcut to Portal on your mobile

Once on the homepage, use the **'Share' button** on your phone to **'Add or save to your home screen.'**

iPhone version
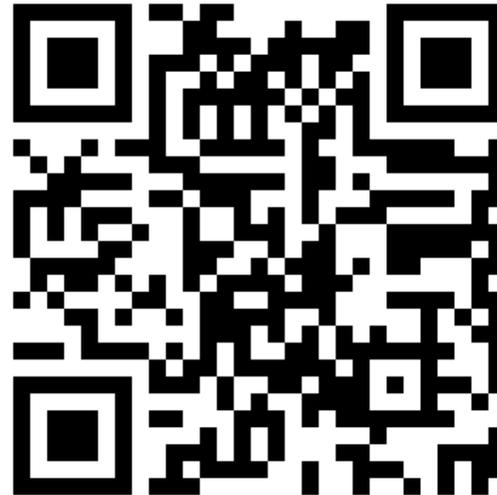
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Sign in to your account

Not registered yet? Register here

Email *

Password *

Reset my password

Sign In

mobile.portal.ugle.org.uk/

Copy

Add to Reading List

Add Bookmark

Add to Favourites

Add to Quick Note

Find on Page
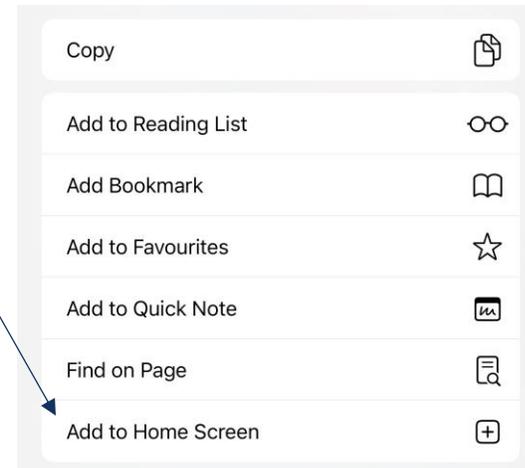
Add to Home Screen

This will have the effect of **installing it as an app on your phone.**

Tap on the three small circles in the top right of your screen and then click on 'Add to Home Screen'

Click Install twice when prompted
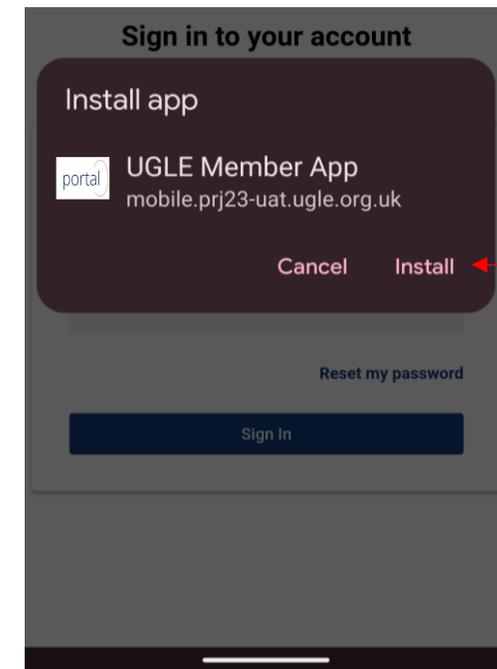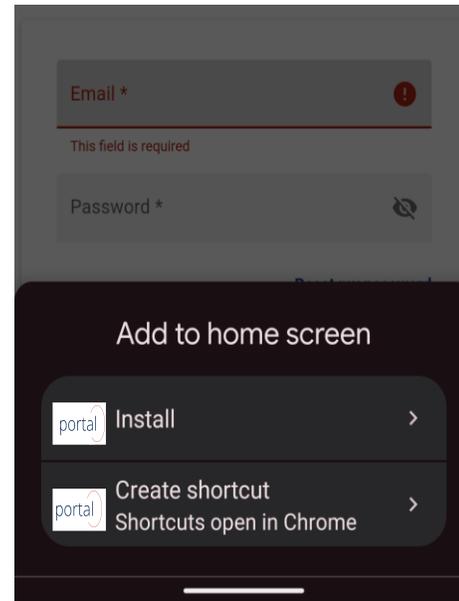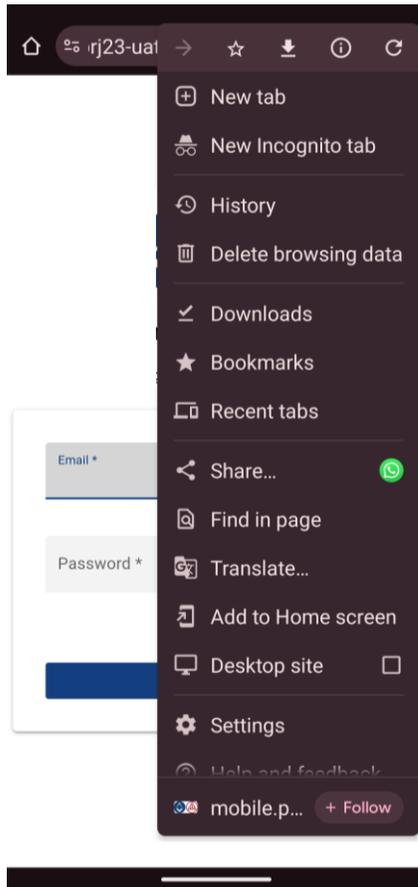
Features and functionality in Portal

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

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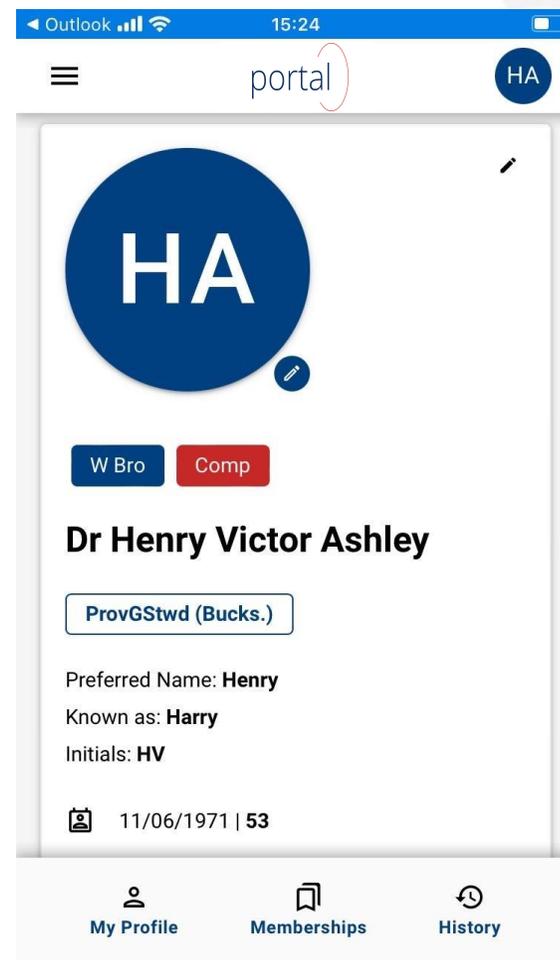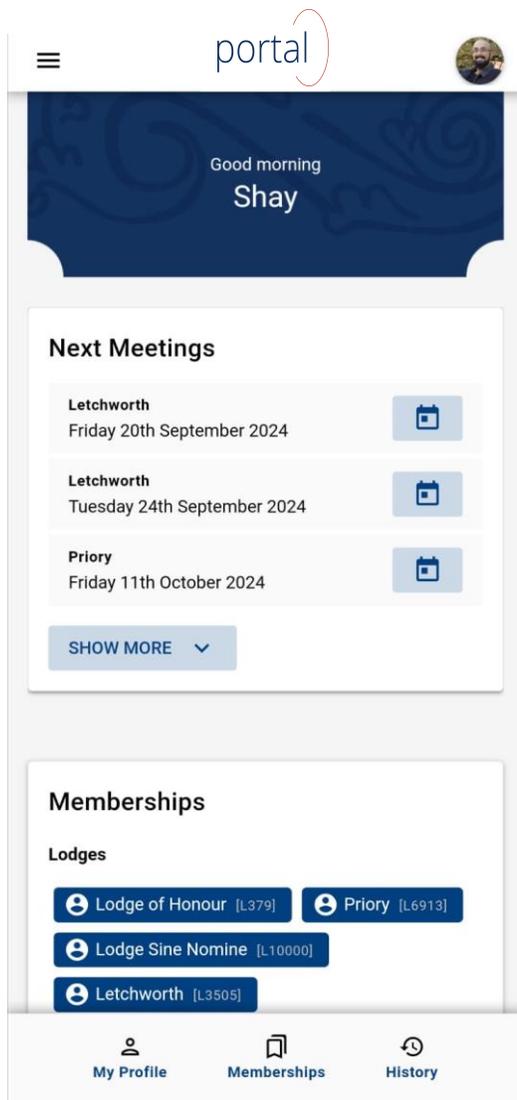
The **'Next Meetings'** section allows easy access to information about upcoming Lodge and Chapter meetings. By clicking on the small calendar icon on the right, you can **download an .ics file** that automatically adds the event to your personal calendar.

In this section, you'll find information about your **Lodge Certificate Number** and **Provincial/District membership**.
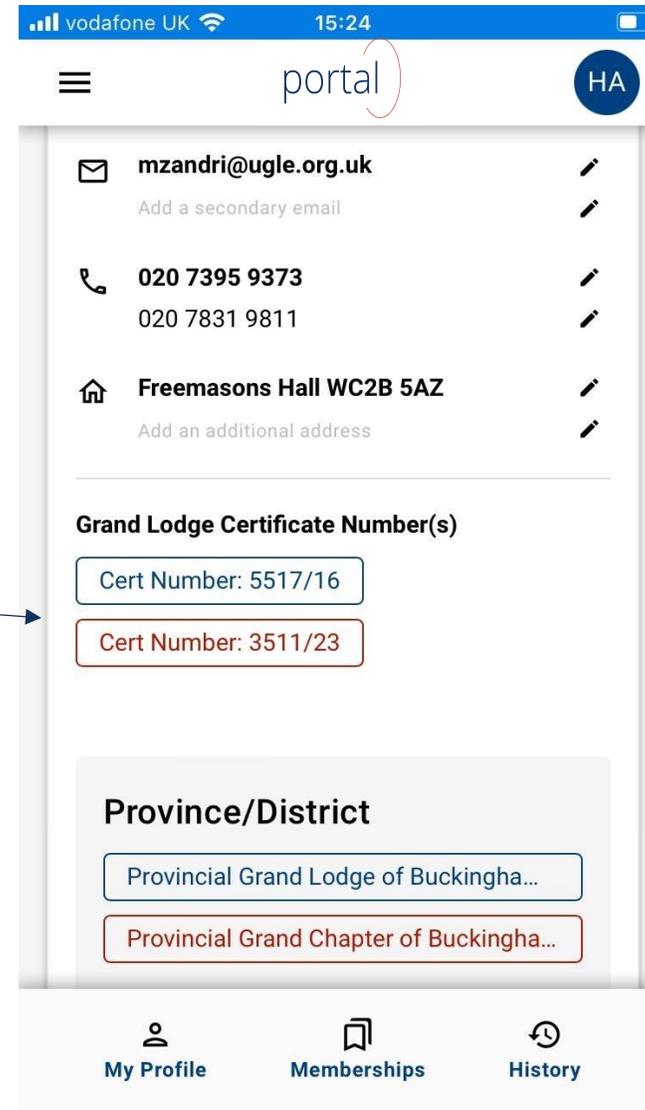
Your **Lodges** and **Chapters memberships** are detailed here.
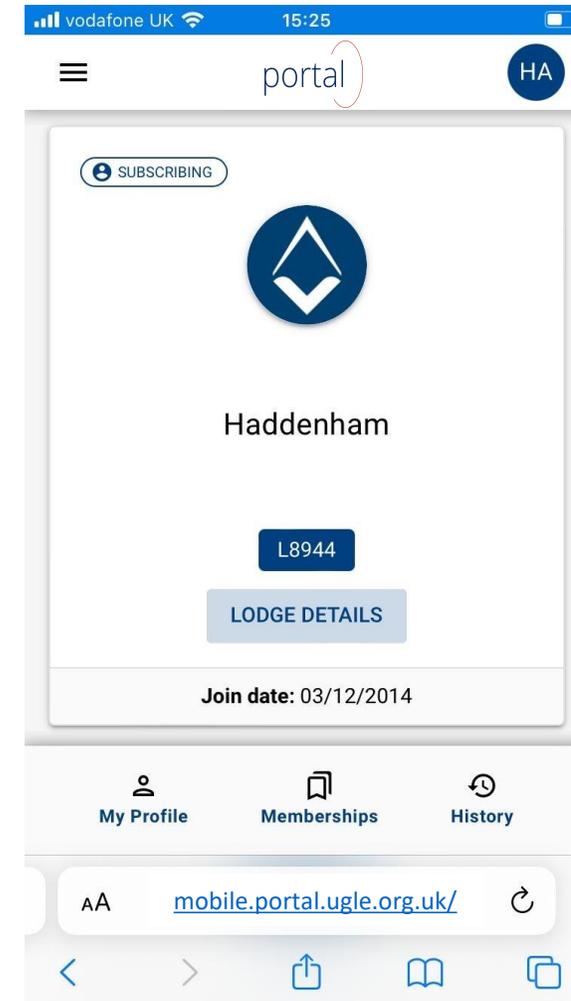
Review the details of your **Masonic Career History…**
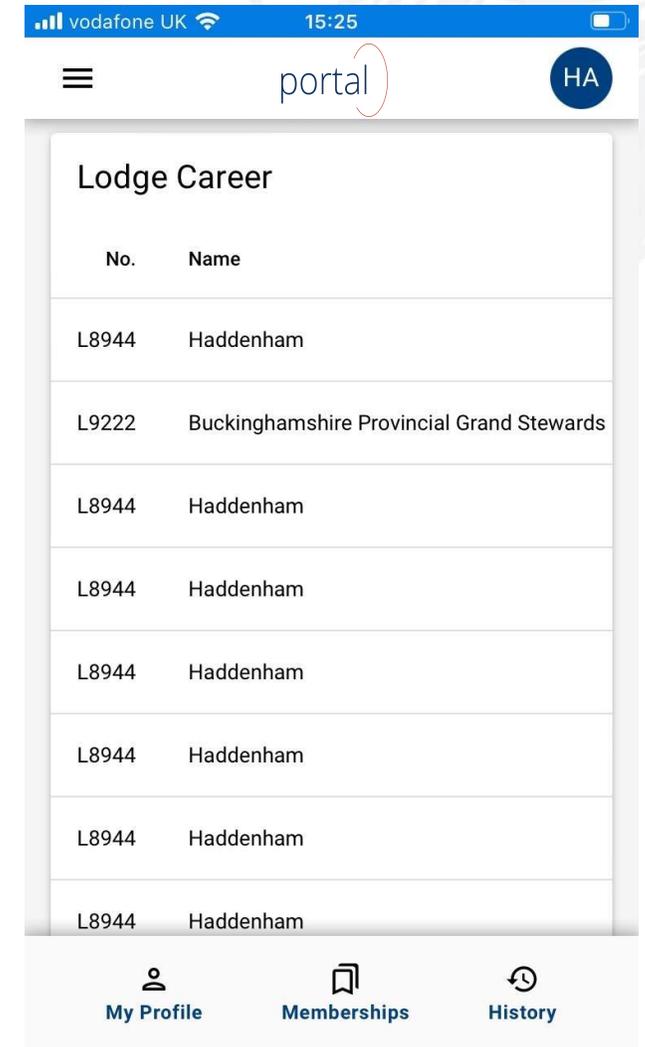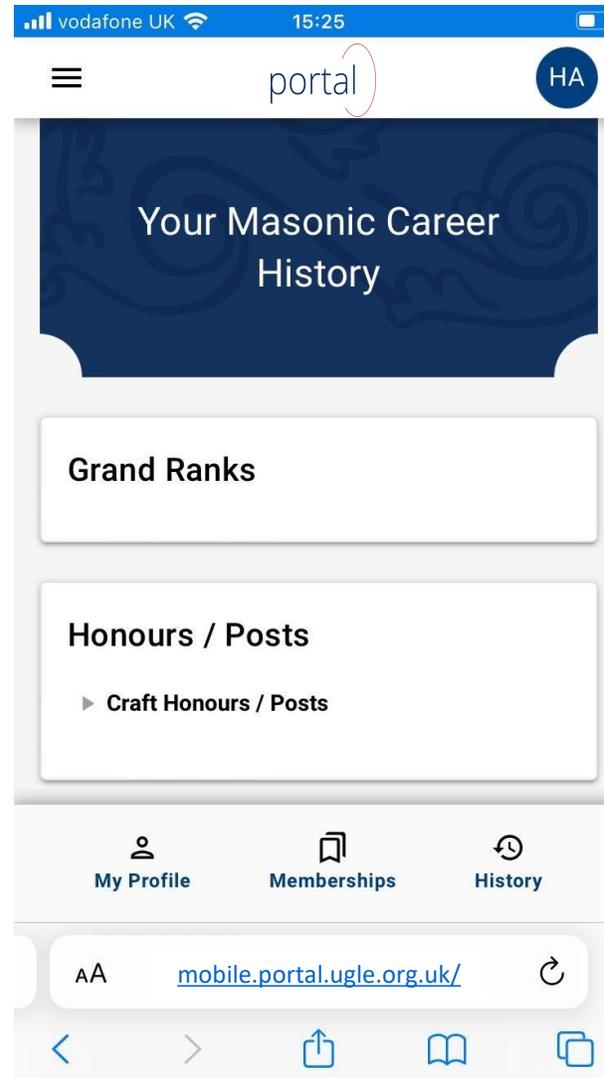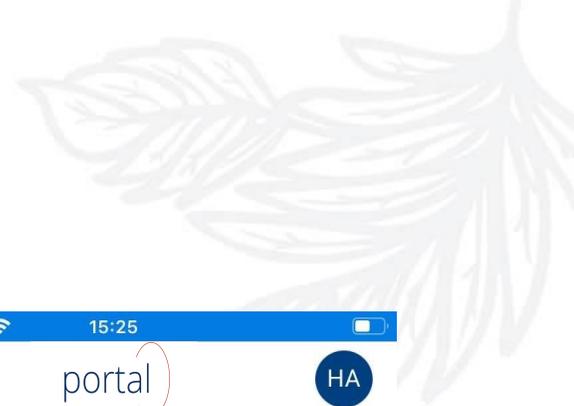
By clicking on your Lodges and Chapters Memberships you'll be able to access information on the **upcoming meetings** and details such as the consecration day and your Lodge/Chapter Officers.
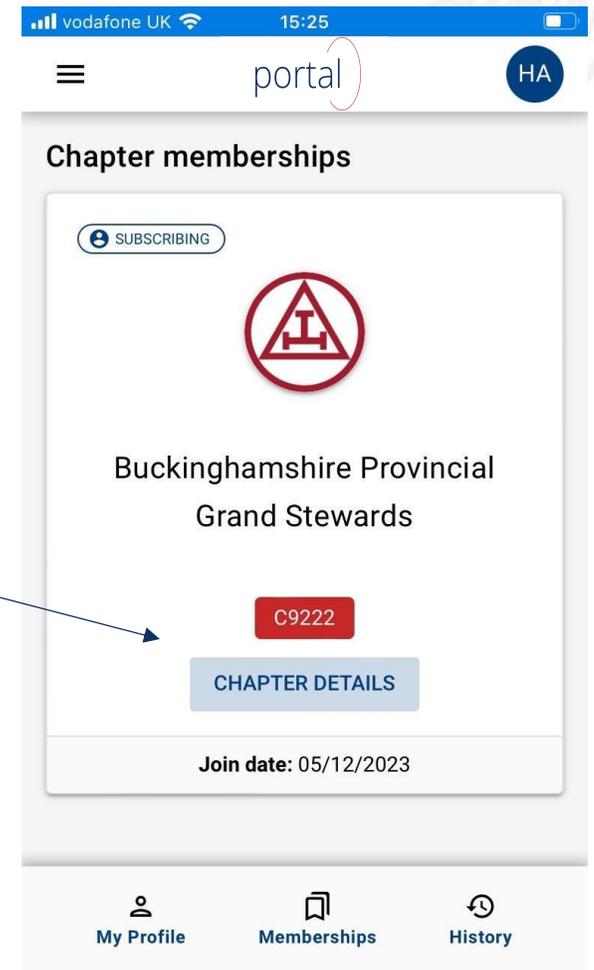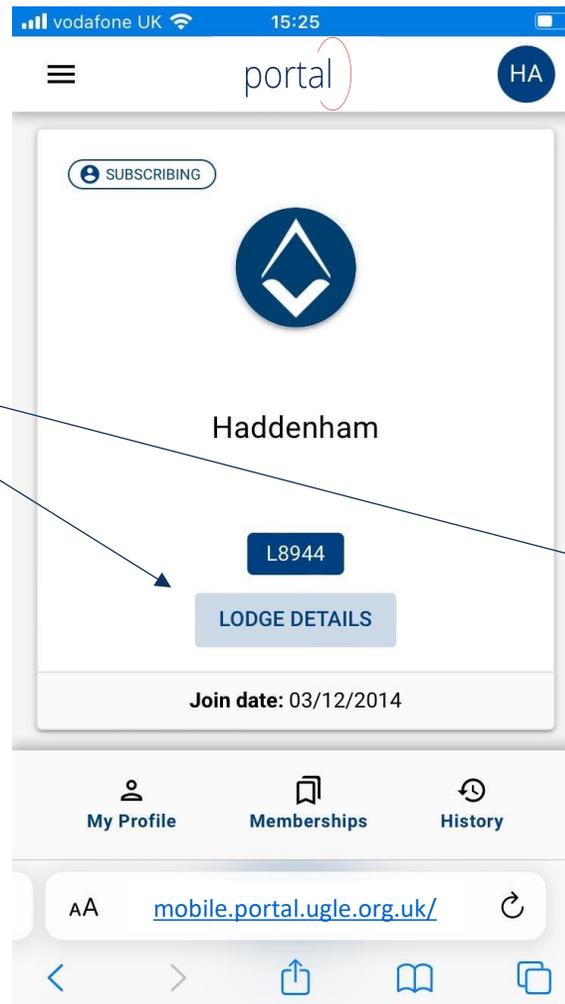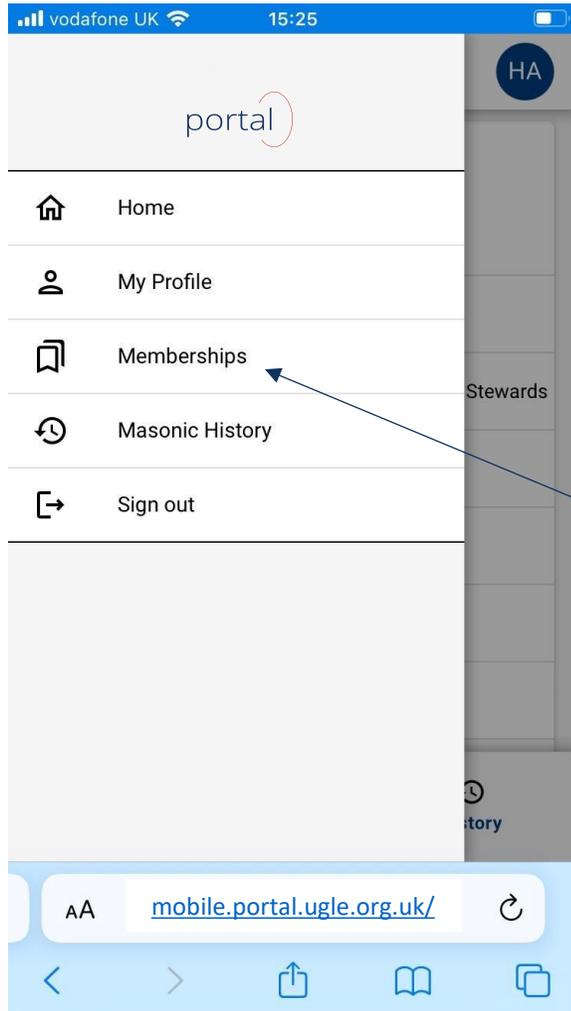
All members details are also easily accessible by clicking on the 'Members' icon located on the left side of your screen.

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.
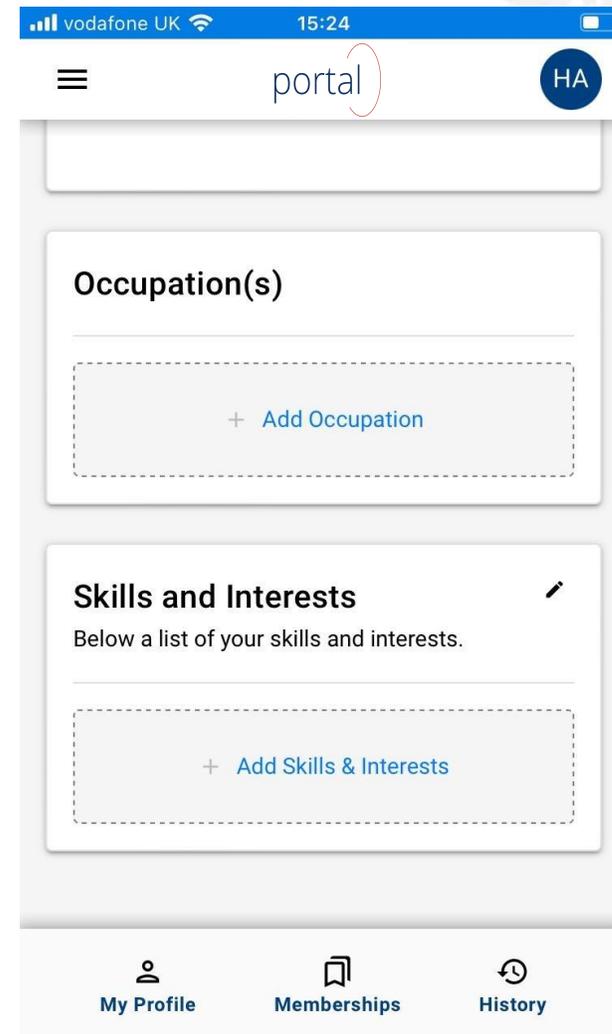
Privacy settings

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.

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.

Unit
Your secondary phone number can be viewed by anyone who is also a member of any Lodge/Chapter to which you belong.

Province
Your secondary phone number can be viewed by anyone who is a member of any Province/District to which you belong.

Global
Your secondary phone number can be viewed by anyone who is registered.

CANCEL   SAVE

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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!

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

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Or scan the **QR code** below:

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