

portal

MOBILE USER GUIDE



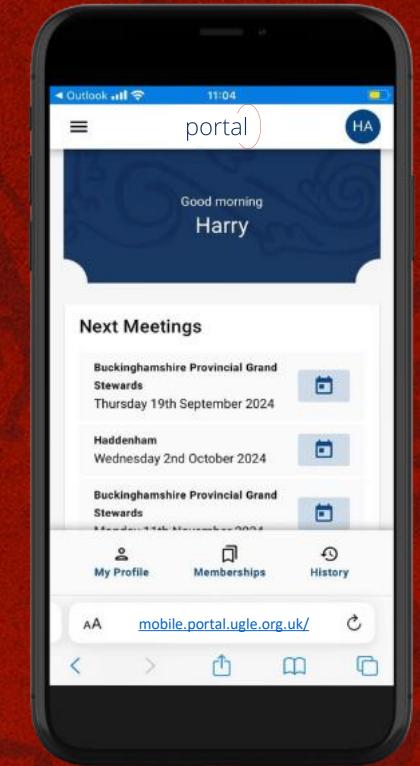
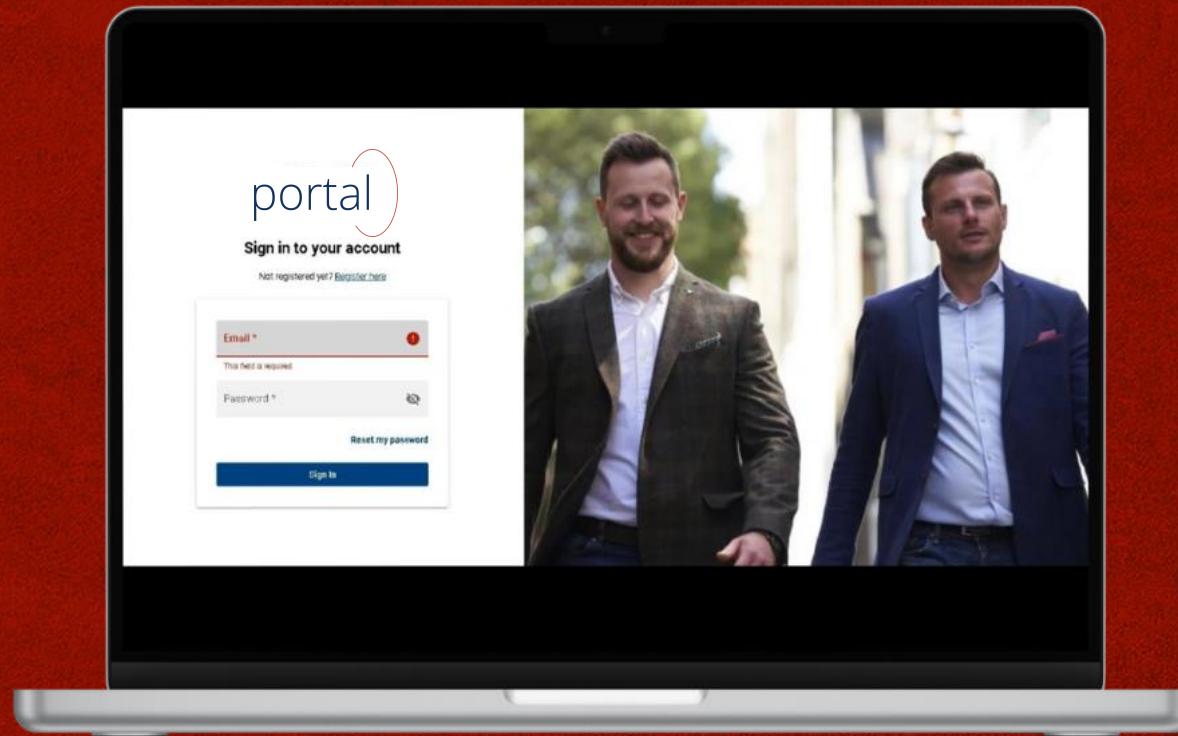
Join us in revolutionising Freemasonry for the digital age
with our membership app!

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.



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.

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

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>

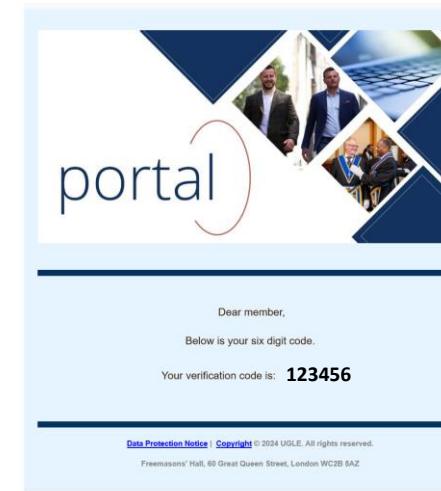
Or scan the **QR code** below:



Creating your Portal account in 6 steps

1. Use your email address* to register

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



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



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

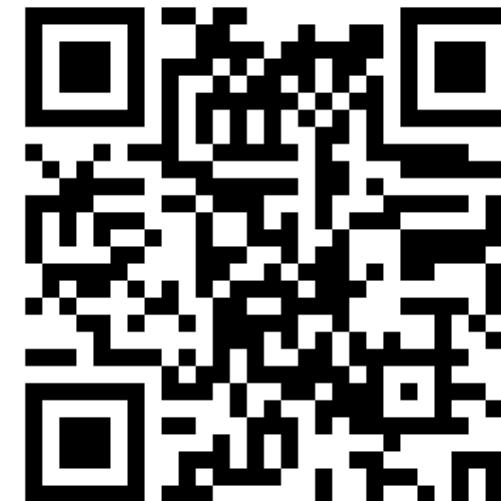
Logging into Portal



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

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

Or scan the **QR code** below:



Logging into Portal



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

The form contains the following fields and buttons:

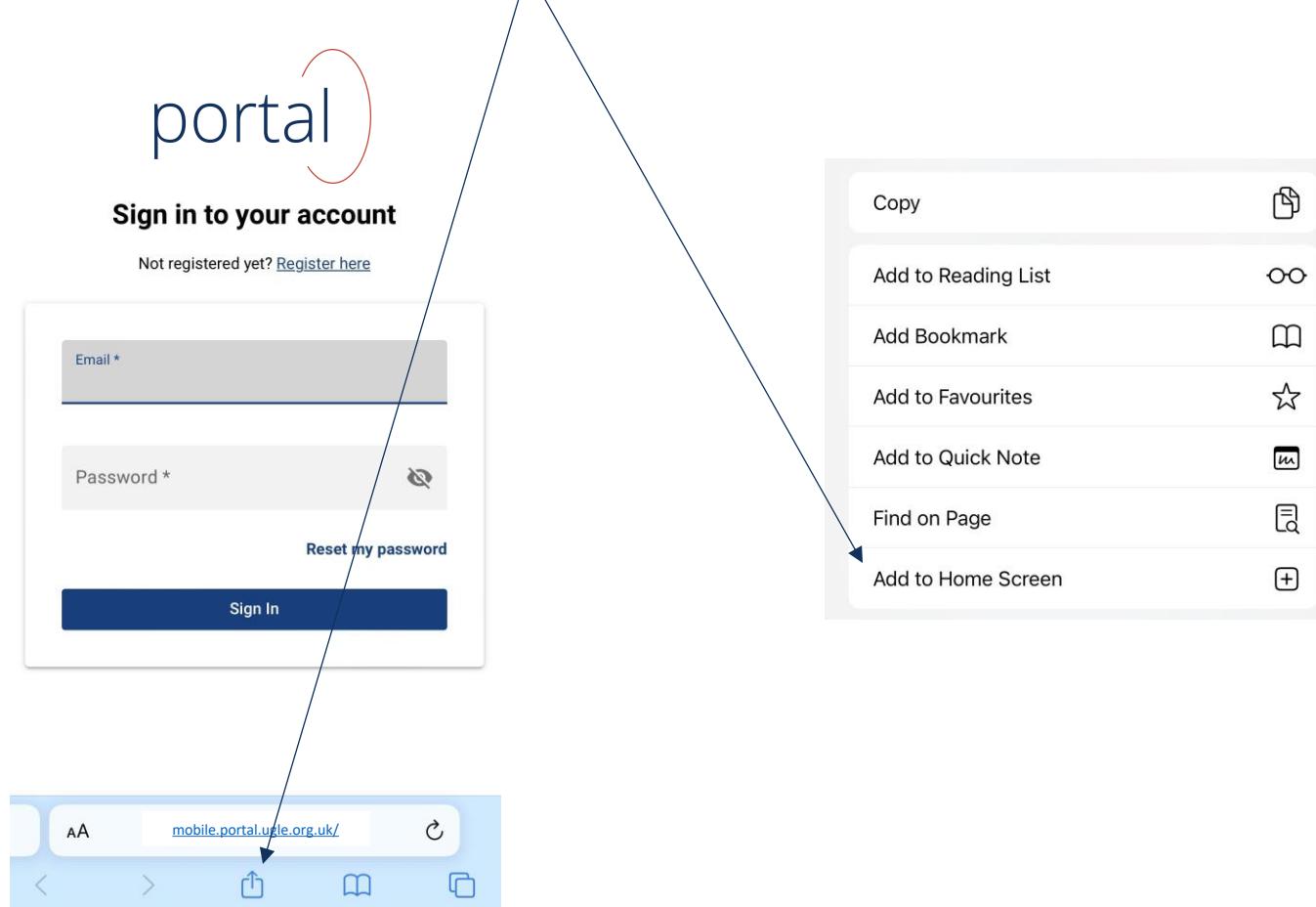
- Email *
- Password *
- Reset my password
- Sign In

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.'**



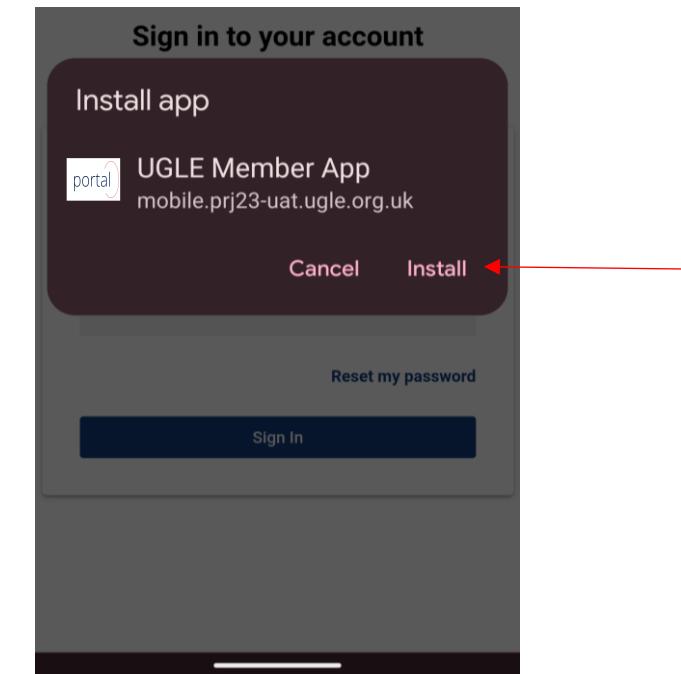
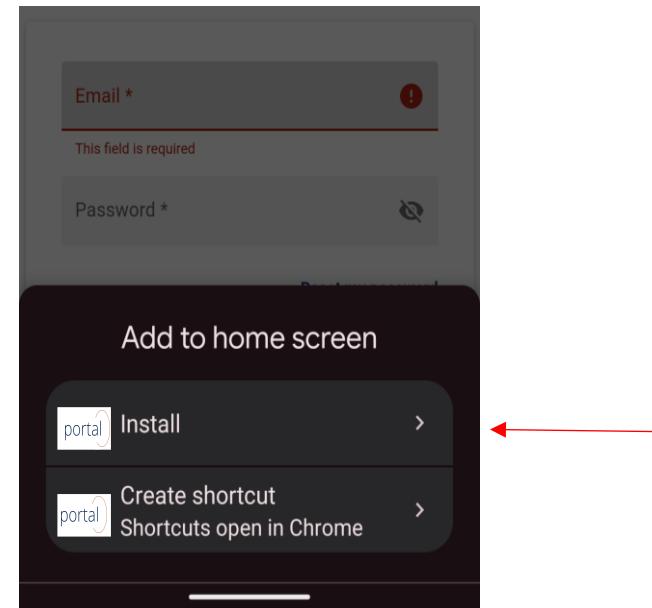
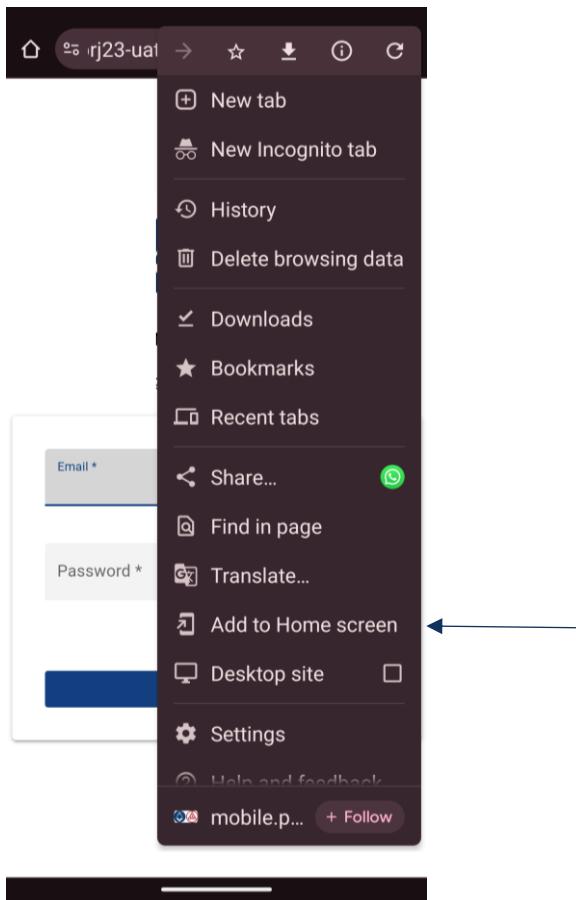
iPhone version

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

Android version

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

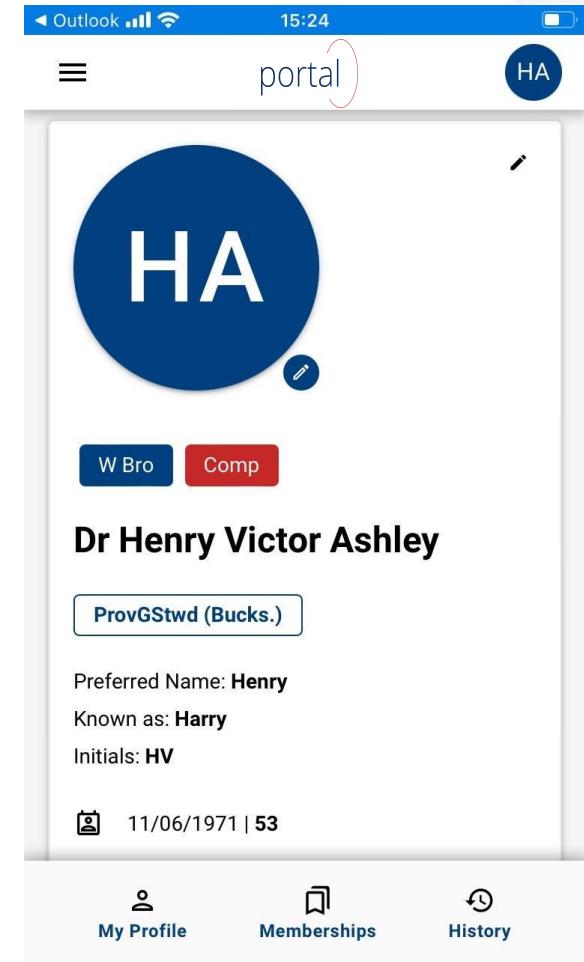


Features and functionality in Portal

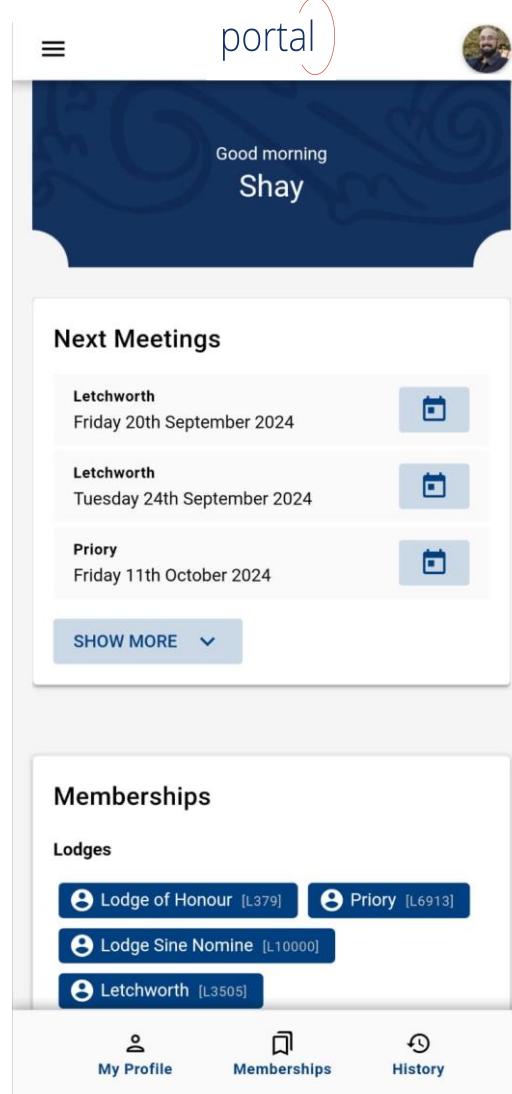
This is what your profile page will look like on mobile.

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 screenshot shows the portal homepage. At the top, it says "Good morning Shay". Below that is a "Next Meetings" section listing three events:

- Letchworth, Friday 20th September 2024
- Letchworth, Tuesday 24th September 2024
- Priory, Friday 11th October 2024

Each event has a small calendar icon to its right. Below this is a "SHOW MORE" button. Further down is a "Memberships" section titled "Lodges" with four entries: "Lodge of Honour [L379]", "Priory [L6913]", "Lodge Sine Nomine [L10000]", and "Letchworth [L3505]". At the bottom are three navigation links: "My Profile", "Memberships", and "History".

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.

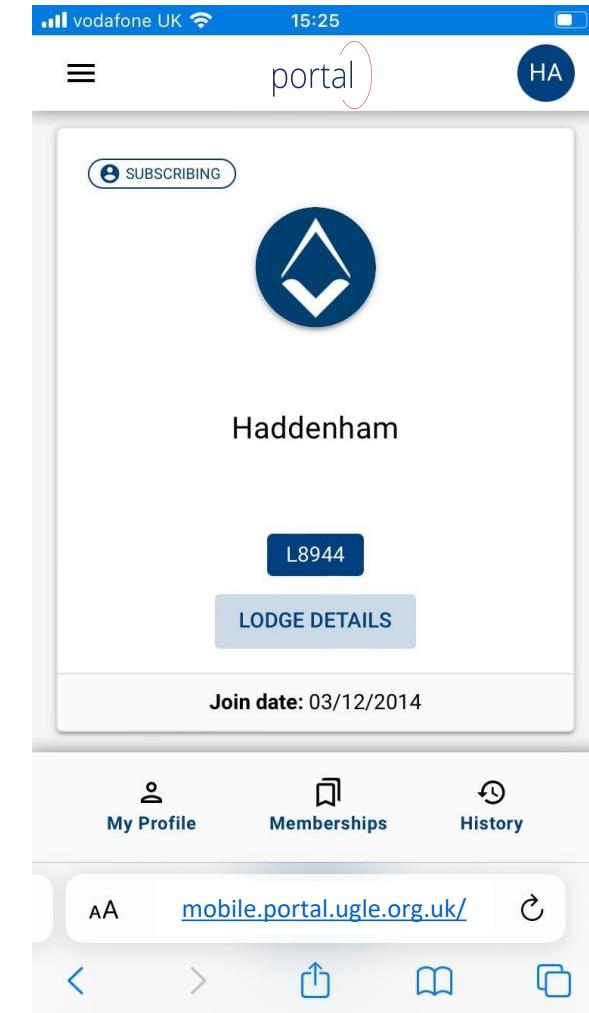


The screenshot shows a mobile application interface with the following details:

- Contact Information:**
 - Email: mzandri@ugle.org.uk
 - Phone: 020 7395 9373
 - Phone: 020 7831 9811
 - Address: Freemasons Hall WC2B 5AZ
- Grand Lodge Certificate Number(s):**
 - Cert Number: 5517/16
 - Cert Number: 3511/23
- Province/District:**
 - Provincial Grand Lodge of Buckingha...
 - Provincial Grand Chapter of Buckingha...
- Navigation:** My Profile, Memberships, History

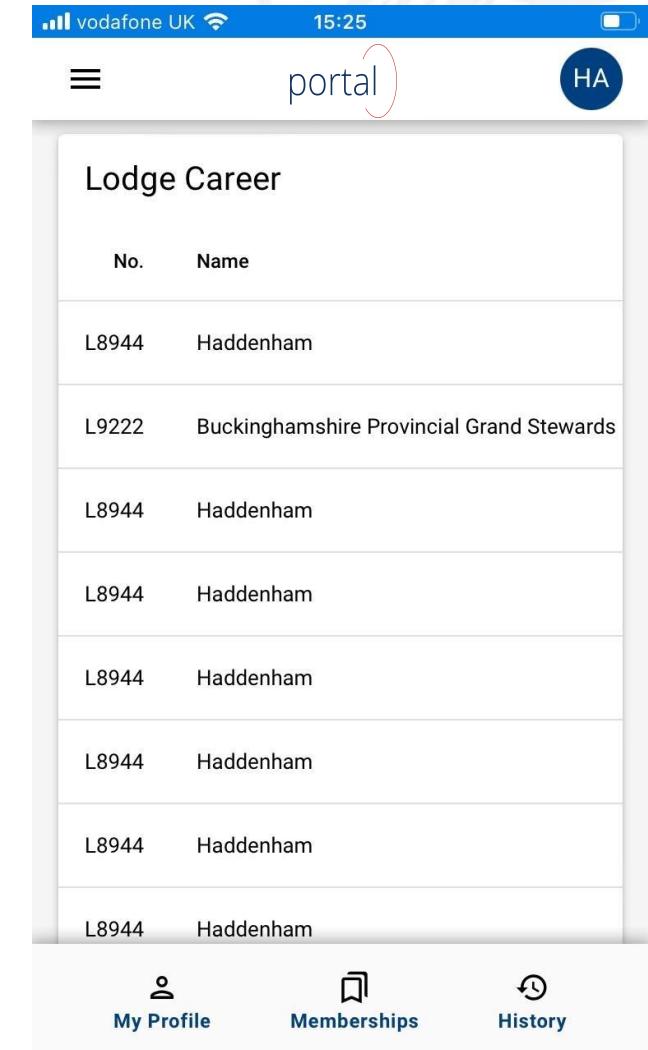
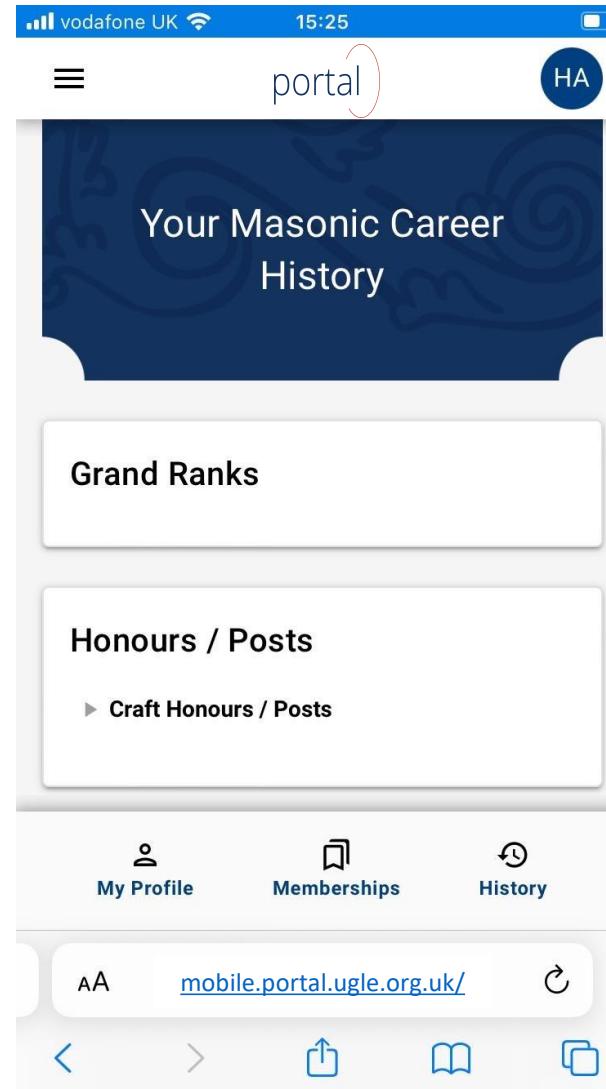
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Your **Lodges** and
Chapters
memberships are
detailed here.



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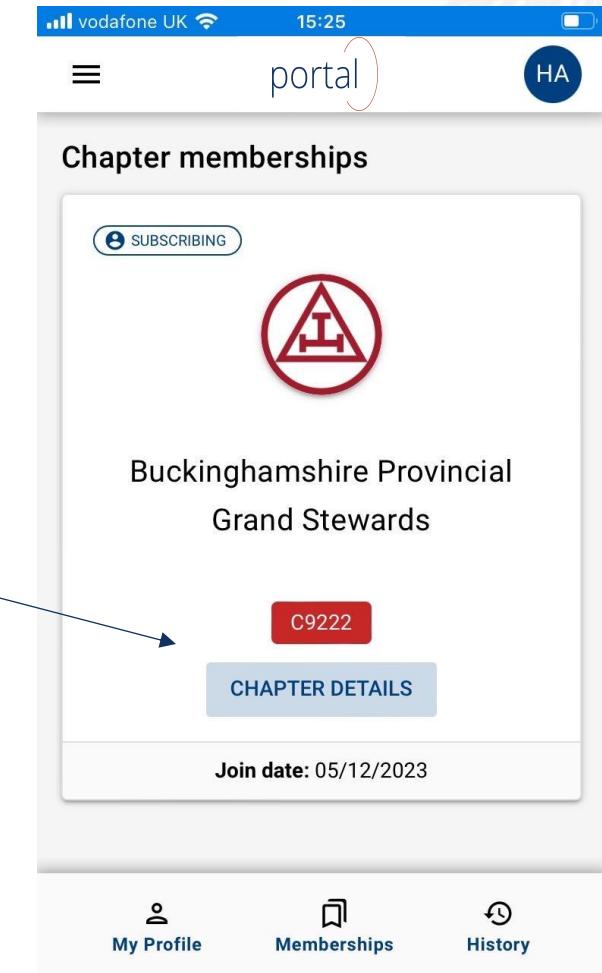
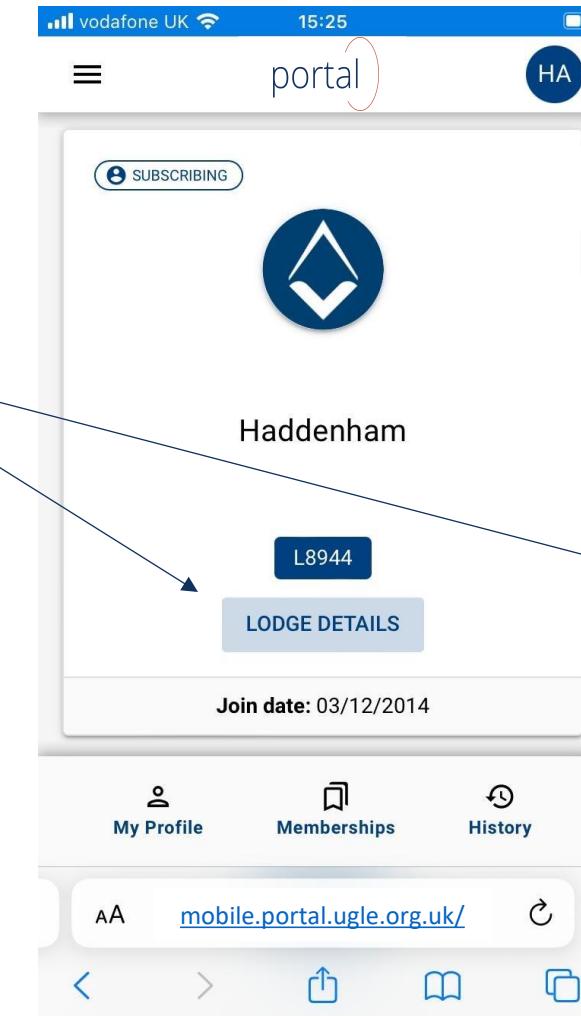
Review the details
of your Masonic
Career History...

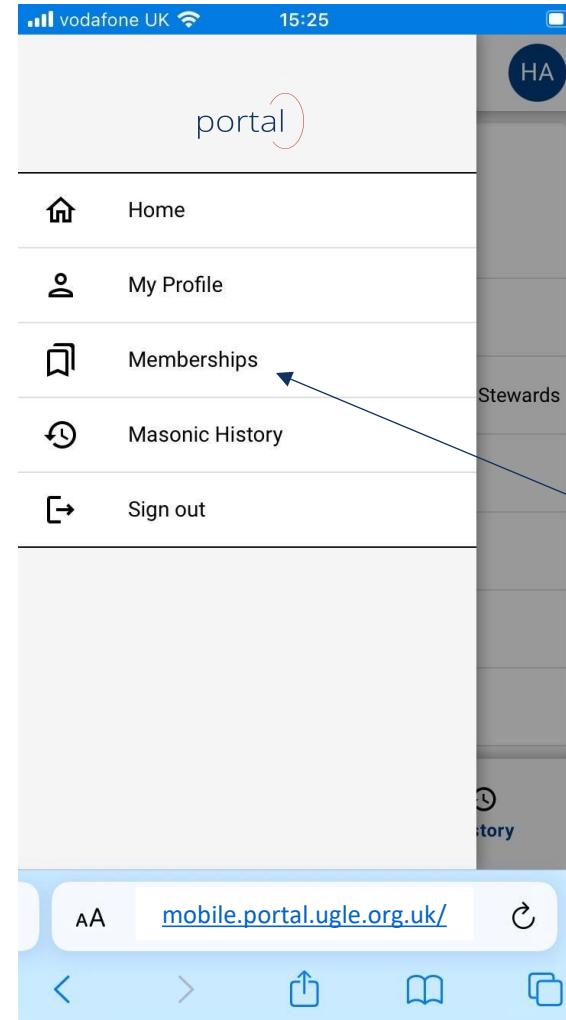


portal

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.

portal

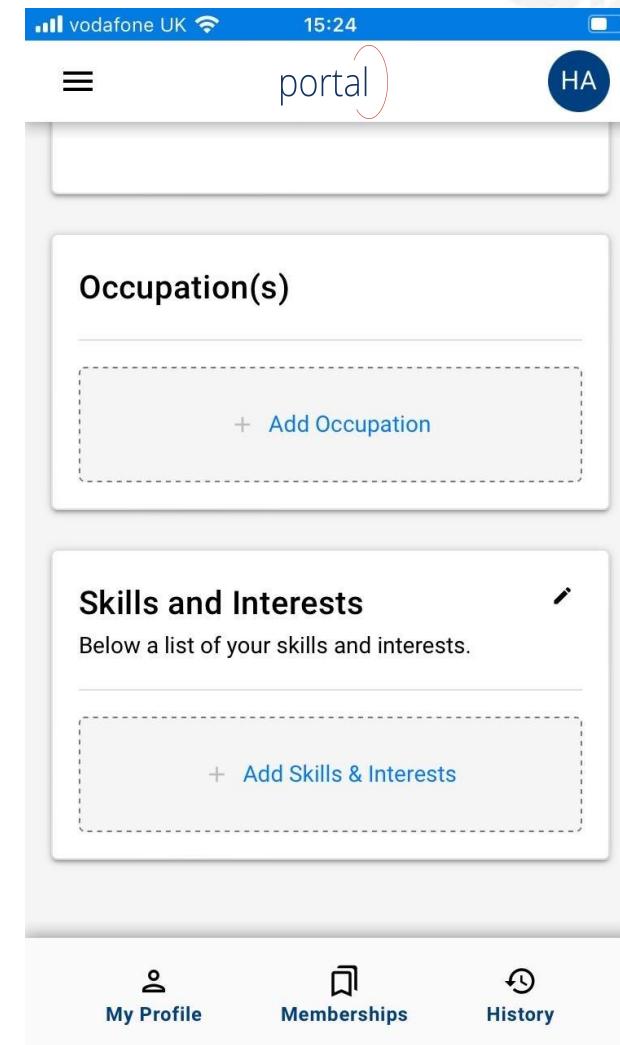




All members details are also easily accessible by clicking on the 'Members' icon located on the left side of your screen.

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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.

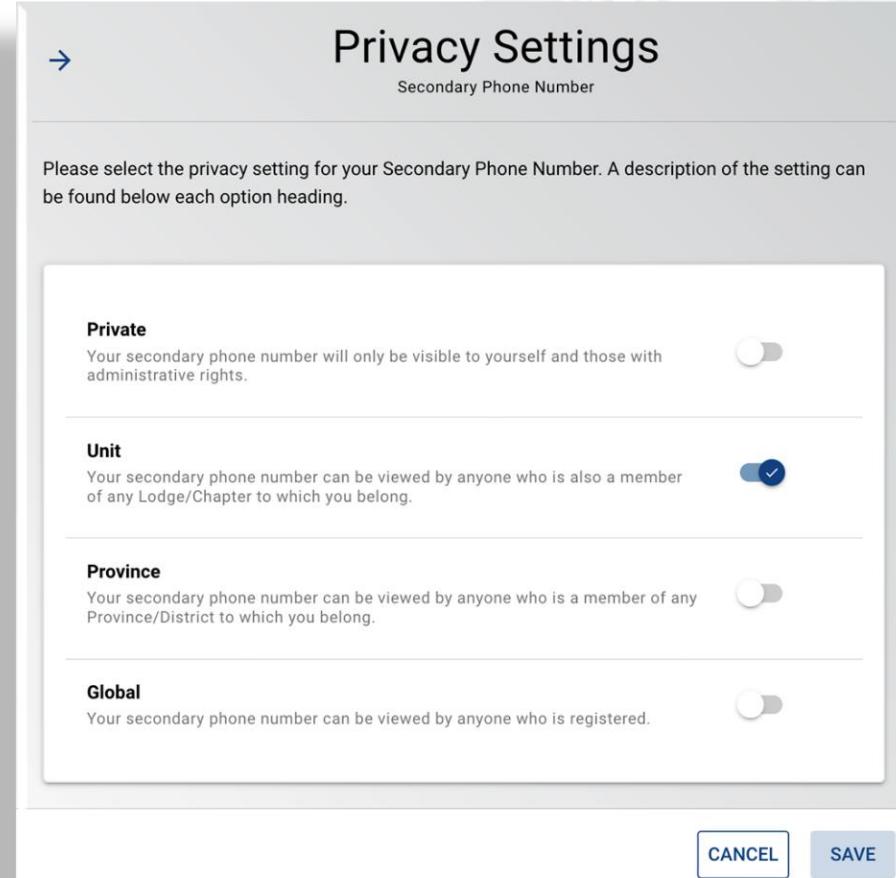


Privacy settings

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' page for a 'Secondary Phone Number'. At the top, there is a header with an arrow icon and the title 'Privacy Settings'. Below the header, a sub-header reads 'Secondary Phone Number'. A descriptive text at the top of the page says: 'Please select the privacy setting for your Secondary Phone Number. A description of the setting can be found below each option heading.' The page contains four privacy setting sections, each with a toggle switch:

- Private**: Your secondary phone number will only be visible to yourself and those with administrative rights. The toggle switch 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. The toggle switch is on.
- Province**: Your secondary phone number can be viewed by anyone who is a member of any Province/District to which you belong. The toggle switch is off.
- Global**: Your secondary phone number can be viewed by anyone who is registered. The toggle switch is off.

At the bottom right of the page 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**

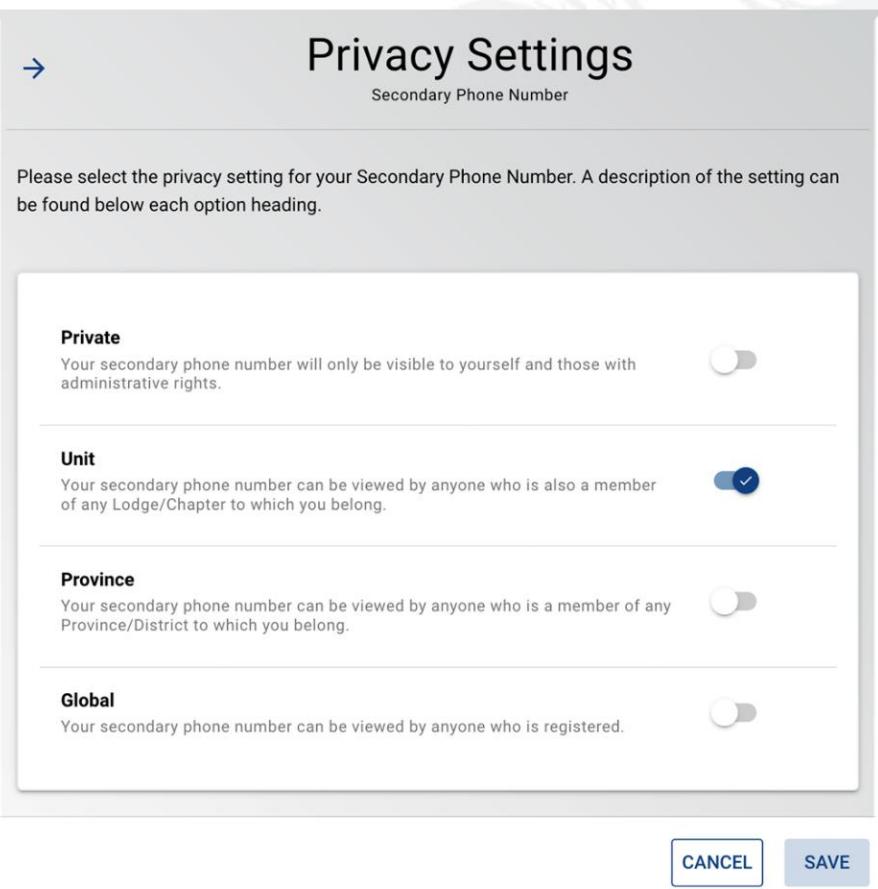
In this instance the data is accessible to the member, any admin user and any member of a Lodge/Chapter in which the member is also a member

- **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



The screenshot shows a 'Privacy Settings' page for a 'Secondary Phone Number'. At the top, there is a header with the title 'Privacy Settings' and a sub-header 'Secondary Phone Number'. Below the header, a message instructs the user to 'Please select the privacy setting for your Secondary Phone Number. A description of the setting can be found below each option heading.' The page contains four settings, each with a toggle switch:

- Private**: Your secondary phone number will only be visible to yourself and those with administrative rights. The toggle switch 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. The toggle switch is on.
- Province**: Your secondary phone number can be viewed by anyone who is a member of any Province/District to which you belong. The toggle switch is off.
- Global**: Your secondary phone number can be viewed by anyone who is registered. The toggle switch is off.

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

Thank you!



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