

# Membership Software - Sample Screens

## Select Member Screen

First Nation Membership Database V1.2.7 - [Membership Listing]

File Membership Reports Tools Window Help

Search For:  Age Range: All Membership Gender: All

Name	Band #	CIS Serial	Address	Home Phone	Age As Of Today
Apple, Judy	146001		123 Sugar Lane, Anywhere, Ontario, A1A 1A1	888-888-8888	7 yrs
Apple, Mavis, Wanda	14600		123 Sugar Lane, Anywhere, Ontario, A1A 1A1	888-888-8888	65 yrs
Bird, Fred	14668		1 Sesame St., Anywhere, Ontario, A1A 1A1	333-3333	49 yrs
Bird, Joey	146223		1 Sesame St., Anywhere, Ontario, A1A 1A1	333-3333	30 yrs
Bond, James	146007		R.R. # 007, Arva, Ontario, N0R 0E7	777-0077	68 yrs
Cheap, Alex	146445		1 Penny Pinch Place, Anywhere, Ontario, A1A 1A1	1-800-686-5565	76 yrs
Chretien, Aline	146987		R.R. #1000, Anywhere, Ontario, A1A 1A1	999-9999	77 yrs
Chretien, Jean	146236		R.R. #1000, Anywhere, Ontario, A1A 1A1	999-9999	80 yrs
Clinton, Bill	14611		R.R. # 3, Arkona, Ontario, P1A 0G2	222-2222 ext. 2	72 yrs
Clinton, Chelsea	146887		R.R. # 3, Arkona, Ontario, P1A 0G2	222-2222 ext. 2	39 yrs
Dough, John, Joe	14200		129 Baker's Cres., Anywhere, Ontario, A1A 1A1	444-4444	44 yrs
Fishbowl, Jessie, Alba	14602		46 Slow Rd., Anywhere, Ontario, A1A 1A1	1-888-555-5555	23 yrs
Fishbowl, Thelma, Annie	14601		46 Slow Rd., Anywhere, Ontario, A1A 1A1	1-888-555-5555	46 yrs
French, Jack, John	1461234504		25 Wellington Rd., Anywhere, Ontario, A1A 1A1	444-4444	41 yrs
French, Jemima, Jenny	1461234505		25 Wellington Rd., Anywhere, Ontario, A1A 1A1	444-4444	34 yrs
French, Jeremiah, Paul	1461234503		25 Wellington Rd., Anywhere, Ontario, A1A 1A1	444-4444	37 yrs
French, Jolene, Wanda	1461234502		25 Wellington Rd., Anywhere, Ontario, A1A 1A1	444-4444	70 yrs
French, Jose, Georges	1461234501		25 Wellington Rd., Anywhere, Ontario, A1A 1A1	444-4444	70 yrs
French, Lucille	1461234598		33 Cloverleaf Cres., Anywhere, Ontario, A1A 1A1	633-3366	91 yrs
French, Patrice	1461234599		55 Yellow Brick Rd., Anywhere, Ontario, A1A 1A1	222-3333	92 yrs
Giraffe, Jerome, Spotted	147789		44 Zoo Way, Anywhere, Ontario, A1A 1A1	666-6666	53 yrs
Giraffe, Lucy	146558		44 Zoo Way, Anywhere, Ontario, A1A 1A1	666-6666	50 yrs
Hoot Hoover, H.	146133		22 Owl House Rd., Whootsville, Ontario, H1H 1H1	519-111-1111	43 yrs
Jones, Bill	14612		25 Petticoat Lane, Anywhere, Ontario, A1A 1A1	222-4444	39 yrs
Little, Sarah	14678		25 Petticoat Lane, Anywhere, Ontario, A1A 1A1	222-4444	39 yrs
Melrose, Mabel, Missy	14604		99 Nowhere Ave., Anywhere, Ontario, A1A 1A1	666-5555	48 yrs
Melrose, Mart, Art	14603		77 Chickadee Ct., Anywhere, Ontario, A1A 1A1	111-1111	73 yrs
Melrose, Merla, Mae	146555		77 Chickadee Ct., Anywhere, Ontario, A1A 1A1	111-1111	69 yrs
Prolific, Machatto	14699		789 Excess Rd., Anywhere, Ontario, A1A 1A1	777-7777	39 yrs
Prolific, Madison	1460989		789 Excess Rd., Anywhere, Ontario, A1A 1A1	777-7777	38 yrs
Prolific, Marty	14986		789 Excess Rd., Anywhere, Ontario, A1A 1A1	777-7777	63 yrs

Buttons on the right: Edit, Add New, Delete, Family Profile Report, Member Profile Report, Files, Close

You can quickly search for a person by using the **Search For** field at the top of the window.

You can filter your main list by:

- **Age Range:**
  - o All Membership
  - o Adults (18+)
  - o Children (0-17)
- **Gender:**
  - o All
  - o Male
  - o Female

Clicking the **Reset Filters** button displays the entire membership list again.

Clicking the **Family Profile Report** button on the right side of the window will generate the report for the highlighted person, including any family members that are linked to this person's profile.

Clicking the **Member Profile Report** button on the right side of the window will generate the report for the highlighted person only. Information about any linked family members will not be included.

## Member's File – Basic Information Tab

Merla Melrose

Basic Information | Employment History | Education History | Children - 1

Band Number: 146555  Attach Photo  Active:

Previous Band Number:  Eligible Via:  Bill C-31  
 Bill S-3

Current CIS Serial:  Registry Category: 6(2)()

Last Name: Melrose Residence Code:

Birth Name:  Lives On The Reserve:

Given Name: Merla Lives On A Different Reserve:

Middle Name: Mae Band Member:

Alias:  Non-Status:

Address: 77 Chickadee Cr. Resident In A Nursing Home:

Town / City: Anywhere Requires Homemaker:

Province / State: Ontario Do Not Include In Mailings:

Postal / Zip Code: A1A 1A1 Employment Status:  Currently Employed  
 Seeking Employment  
 Retired

Home / Work Phone: 111-1111 /  Attending School:

Emergency Phone: 222-3333 Highest Education Level Completed: College

Birth / Deceased Date: Aug 8, 1950 / Apr 16, 2020 Power Of Attorney:

Gender:  Male  Female Will Location:

Social Insurance Number: 888 999 777 Notes:

Health Card Number: 1234578956 Anniversary: Apr 16, 2020

Driver's Licence: G

Marital Status / Date: Married Mar 1, 1979

Spouse's Information:  14603 Mart Melrose

Father's Information:

Mother's Information:

## Member's File - Employment History Tab

Merla Melrose

Basic Information | Employment History | Education History | Children - 1

Start Date	End Date	Position	Employer	Province	Years
9/5/1998	9/23/2009	Store Manager	Flo's Fabrics & Crafts	Ontario	11.1
8/14/1995	8/10/1998	Department Mgr	Wendy's Window Dre	Ontario	3.
7/3/1970	8/10/1995	Store Associate	Eaton's	Ontario	25.1

**Employment Details**

Start Date: September 05, 1998

End Date:  September 23, 2009

Position: Store Manager

Employer: Flo's Fabrics & Crafts

Province/State: Ontario

Notes/Comments:

## Member's File – Education History Tab

Merla Melrose

Basic Information | Employment History | **Education History** | Children - 1

Achievement	School	Date	Notes
Diploma in Retail Man	Fanshawe College	4/30/1970	
High School Diploma	Beal Secondary Schoo	6/20/1967	

**Add New** **Delete**

**Education Details**

Achievement:

School/Location:

Date:

Notes/Comments:

**Close**

## Member's File – Children Tab

Merla Melrose

Basic Information | Employment History | Education History | **Children - 1**

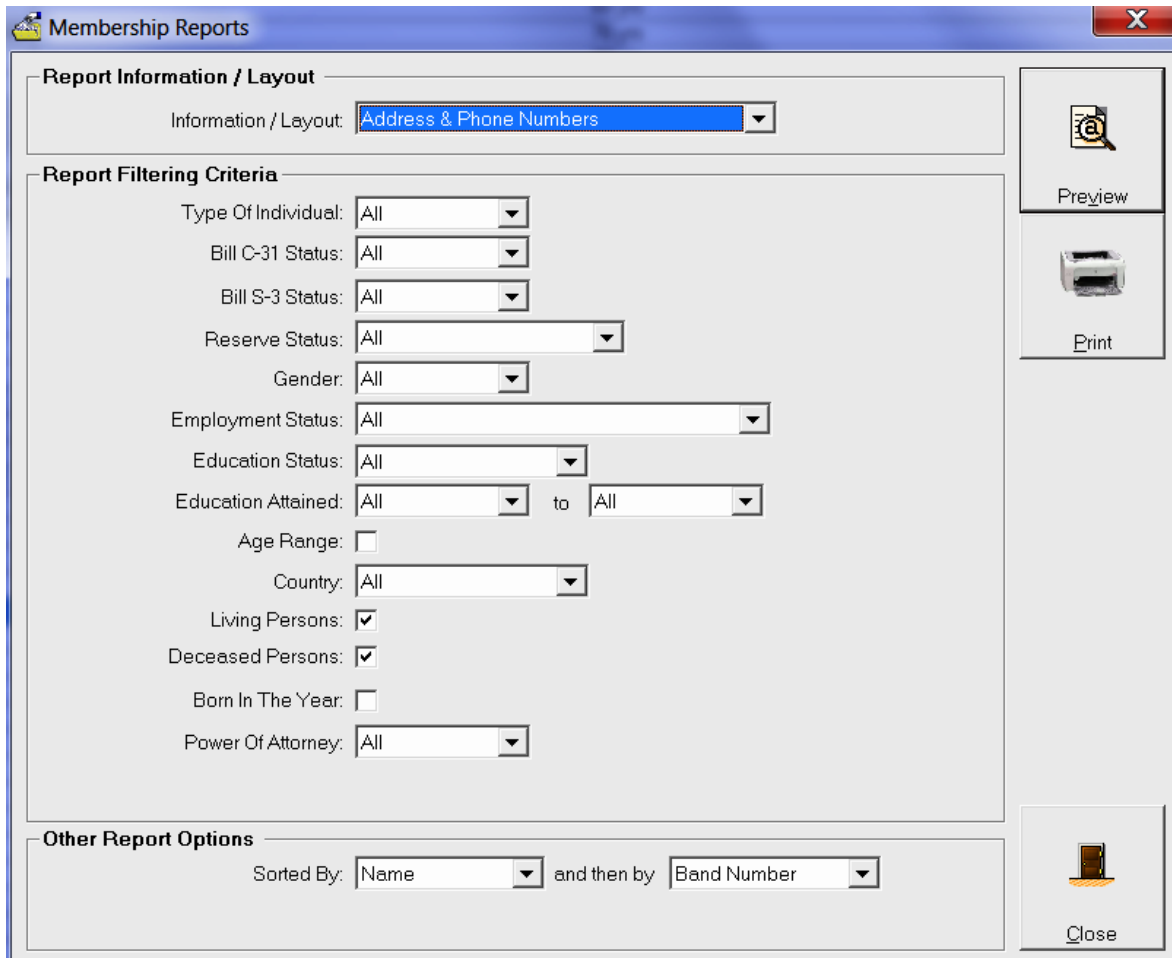
Last	First	Band Number	Age As Of Today
Melrose	Mabel	14604	42 yrs

**Add New**  
**Select**  
**Remove**  
**Refresh List**

**Photo of Child:**

**Close**

## Membership Reports – Report Setup Screen



**Membership Reports**

**Report Information / Layout**  
Information / Layout: **Address & Phone Numbers**

**Report Filtering Criteria**

Type Of Individual: All  
Bill C-31 Status: All  
Bill S-3 Status: All  
Reserve Status: All  
Gender: All  
Employment Status: All  
Education Status: All  
Education Attained: All to All  
Age Range:   
Country: All  
Living Persons:   
Deceased Persons:   
Born In The Year:   
Power Of Attorney: All

**Other Report Options**  
Sorted By: Name and then by Band Number

Preview  
Print  
Close

You can generate the following reports:

- **Address & Phone Numbers Report**
- **Health Card & Social Insurance Numbers Report**
- **Mailing Labels Report**
  - o Option to skip persons with no address information on file
  - o Option to generate labels for all persons regardless of “Keep Off Mailing List” option
- **Ages Report**
- **Education Report**
  - o Option to show ages on the report
- **Employment Report**
- **Family Profile Report**
  - o Option to show ages on the report
- **Statistics Report**
- **Names Only Report**
- **Member Profile Report**
- **Educational Achievements Report**
- **Employment Positions Report**

Every report can be previewed, printed, or saved as a PDF file.

With the exception of the *Statistics Report*, all other reports can be filtered by the following parameters:

- **Member Status:** Members, Non-Members, or All
- **Bill C-31 Status:** C-31, Non C-31, or All
- **Bill S-3 Status:** S-3, Non S-3, or All
- **Reserve Status:** On Reserve, on a Different Reserve, or Off Reserve
- **Gender:** Male, Female, or All
- **Employment Status:**
  - o Employed
  - o Not Employed
  - o Not Employed: Seeking Employment
  - o Not Employed: Not Seeking Employment
  - o Employed: Seeking Employment
  - o Employed: Not Seeking Employment
  - o All
- **Education Status:** Attending School, Not Attending School, or All
- **Education Attained:** Choose from any education level to any other education level
- **Age Range:** Choose a starting and an ending age range as of a particular date (e.g. election date)
- **Country:** Canada Only, Outside Canada, or All
- **Living Persons**
- **Deceased Persons**
- **Born in a Certain Year**
- **Power of Attorney:** Yes or No

When you preview or print the report, the filters that you selected for the report will appear beneath the report's heading so that you will know what filters were used.

You can also choose how the report will be sorted by first by selecting one of the following:

- By Name
- By Band Number
- By Age
- By Gender

You can then choose how the report will be sorted by second by choosing one of the following that was not selected for the first sortation option:

- By Name
- By Band Number
- By Age
- By Gender

The ***Statistics Report*** allows you to generate statistics as of a specific date (e.g. today, the date of an upcoming election, etc.). You can also filter the report by including Living Persons and/or Deceased Persons. The report will provide you with a full breakdown of the following information:

- **Members - Adults:** Females, Males, Total Membership, Bill C-31, Bill S-3, On/Off/Different Reserve
- **Members - Children:** Females, Males, Total Membership, Bill C-31, Bill S-3, On/Off/Different Reserve

- **Members - Sub-Total:** Females, Males, Total Membership, Bill C-31, Bill S-3, On/Off/Different Reserve
- **Non-Members - Adults:** Females, Males, Total Membership, Bill C-31, Bill S-3, On/Off/Different Reserve
- **Non-Members - Children:** Females, Males, Total Membership, Bill C-31, Bill S-3, On/Off/Different Reserve
- **Non-Members - Sub-Total:** Females, Males, Total Membership, Bill C-31, Bill S-3, On/Off/Different Reserve
- **Non-Status - Adults:** Females, Males, Total Membership, On/Off/Different Reserve
- **Non-Status - Children:** Females, Males, Total Membership, On/Off/Different Reserve
- **Non-Status - Sub-Total:** Females, Males, Total Membership, On/Off/Different Reserve
- **Grand Totals for All:** Females, Males, Total Membership, Bill C-31, Bill S-3, On/Off/Different Reserve
- **Marital Statistics for Adults**
- **Employment Statistics for Adults Only**
- **Miscellaneous Statistics:**
  - Under 18 and attending school
  - Adults residing in a nursing home
  - Adults requiring a Homemaker
- **Age Demographics:**
  - **Age Ranges:**
    - 0-4, 5-9, 10-14, 15-19, 20-24, 25-29, 30-34, 35-39, 40-44, 45-49, 50-54, 55-59, 60-64, 65-69, 70-74, 75-79, 80-84, 85-89, 90 and older
  - **Number Of Persons:**
    - Members
    - Non-Members
    - Non-Status
    - Total for all
  - **Percentage (%) of total of each group:**
    - Members
    - Non-Members
    - Non-Status
    - Total for all

## Software Settings Screen

The screenshot shows a window titled "Software Settings" with a close button (X) in the top right corner. The window contains three sections of settings:

- System Configuration Settings:**
  - Name Of First Nation: Sample First Nation
  - Server Address: updates.admorrison.com
- Default settings (when adding new members):**
  - Town/City: Anywhere
  - Province: Ontario (dropdown menu)
  - Postal Code: N0N 1N0
  - Band Number Prefix: 14600
  - Registry Category: 6(2)() (dropdown menu)
- Access Control settings:**
  - Security Password: [password field]

Up to 20 characters long, case sensitive. Leave blank if you do not want to use a password.

An "OK" button is located at the bottom right of the window.

The **Software Settings** screen is where you will configure your First Nation's name, along with the default settings for the city, province, postal code, band number prefix and registry category to save you from entering this information whenever you add a new individual to the software. You will be able to typeover the autopopulated default information fields within clients' files to adjust the information, if needed.

If desired, you can also set up a login password for the software on this screen.