



Project Zip Code

Version 12.0

CUNA's Powerful Grassroots Program

User Manual

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About Project Zip Code 12.0:

Project Zip Code is a secure and user-friendly program that counts your credit union members and matches them by state legislative district, congressional district, and county. These counts are uploaded to CUNA's Project Zip Code website and combined with data from other credit unions nationwide. Many credit union members reside in states other than the state in which their credit union is domiciled. This is why it's so important that all credit unions participate; only with full participation in Project Zip Code can we get a clear picture of credit unions' grassroots strength.

Participation in Project Zip Code will also provide operational benefits for your credit union. You will be able to view the number of credit union members by geographic area, which may be useful in ATM placement and shared branching. Additionally, your data will be matched with the most accurate legislative district information available which will aid in your federal and state advocacy efforts. Project Zip Code software provides you with powerful tools to search and download this useful information.

Project Zip Code software is compatible with most databases and will not damage your existing data. Your members' personal information is secure with Project Zip Code. When running PZC you will be required to create a secure log-in and password. After creating these, you will upload your data to the secure server. On the secure server your data will be matched by legislative district and county and encrypted. Once the data is matched, you will receive a notification email and be asked to securely login and download your encrypted data. After you have downloaded your totals, only the number of credit union members per legislative district and county will remain in the national database. The resulting master census demonstrates the strength of credit union membership across the nation.

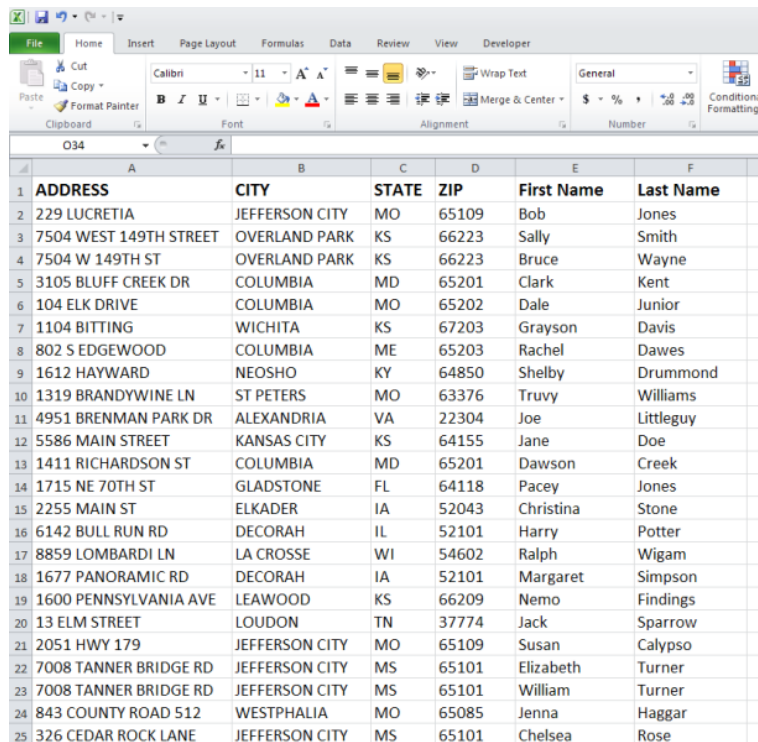
Thank you for your participation in Project Zip Code.

Before Running Project Zip Code

Before you install and run Project Zip Code there are a few things you will need to do in order to upload your data. You may need to consult with your database service provider, database manager or Information Technology personnel to obtain some of the necessary information for running Project Zip Code.

The first step is to export the correct membership data. The information needed to run Project Zip Code is member address including street address, city, state, and, preferably, zip code.

- Each portion of the address must be broken down into separate, labeled columns. For example, column A will list the street address, column B will list the city, and column C the state.
- After you have created the membership database file, please save the file in a convenient location as you will have to direct PZC to the location of the file.
- The most common files used with PZC are CSV (comma delimited text), Access, and Excel. However, PZC will also work with Oracle, SQL Servers, FoxPro, dBase, and Paradox.
 - If your database is Oracle or SQL Server, you will need the database server name as well.
- An example of an Excel membership file is below for your reference. Please note, that this example contains more fields than are necessary to run PZC. To maximize the usefulness of PZC in marketing activities, you may wish to include names or account types. No information beyond the street address, city, and state will ever be transferred to the Project Zip Code secure server.

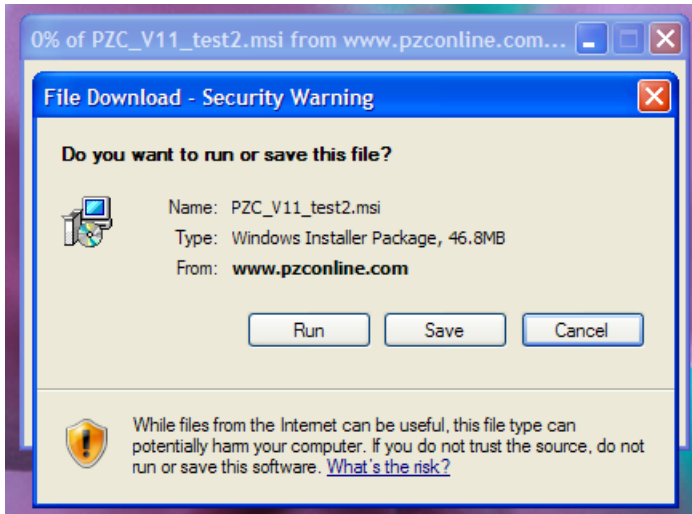


	A	B	C	D	E	F
1	ADDRESS	CITY	STATE	ZIP	First Name	Last Name
2	229 LUCRETIA	JEFFERSON CITY	MO	65109	Bob	Jones
3	7504 WEST 149TH STREET	OVERLAND PARK	KS	66223	Sally	Smith
4	7504 W 149TH ST	OVERLAND PARK	KS	66223	Bruce	Wayne
5	3105 BLUFF CREEK DR	COLUMBIA	MD	65201	Clark	Kent
6	104 ELK DRIVE	COLUMBIA	MO	65202	Dale	Junior
7	1104 BITTING	WICHITA	KS	67203	Grayson	Davis
8	802 S EDGEWOOD	COLUMBIA	ME	65203	Rachel	Dawes
9	1612 HAYWARD	NEOSHO	KY	64850	Shelby	Drummond
10	1319 BRANDYWINE LN	ST PETERS	MO	63376	Truvy	Williams
11	4951 BRENMAN PARK DR	ALEXANDRIA	VA	22304	Joe	Littleguy
12	5586 MAIN STREET	KANSAS CITY	KS	64155	Jane	Doe
13	1411 RICHARDSON ST	COLUMBIA	MD	65201	Dawson	Creek
14	1715 NE 70TH ST	GLADSTONE	FL	64118	Pacey	Jones
15	2255 MAIN ST	ELKADER	IA	52043	Christina	Stone
16	6142 BULL RUN RD	DECORAH	IL	52101	Harry	Potter
17	8859 LOMBARDI LN	LA CROSSE	WI	54602	Ralph	Wigam
18	1677 PANORAMIC RD	DECORAH	IA	52101	Margaret	Simpson
19	1600 PENNSYLVANIA AVE	LEAWOOD	KS	66209	Nemo	Findings
20	13 ELM STREET	LOUDON	TN	37774	Jack	Sparrow
21	2051 HWY 179	JEFFERSON CITY	MO	65109	Susan	Calypso
22	7008 TANNER BRIDGE RD	JEFFERSON CITY	MS	65101	Elizabeth	Turner
23	7008 TANNER BRIDGE RD	JEFFERSON CITY	MS	65101	William	Turner
24	843 COUNTY ROAD 512	WESTPHALIA	MO	65085	Jenna	Haggar
25	326 CEDAR ROCK LANE	JEFFERSON CITY	MS	65101	Chelsea	Rose

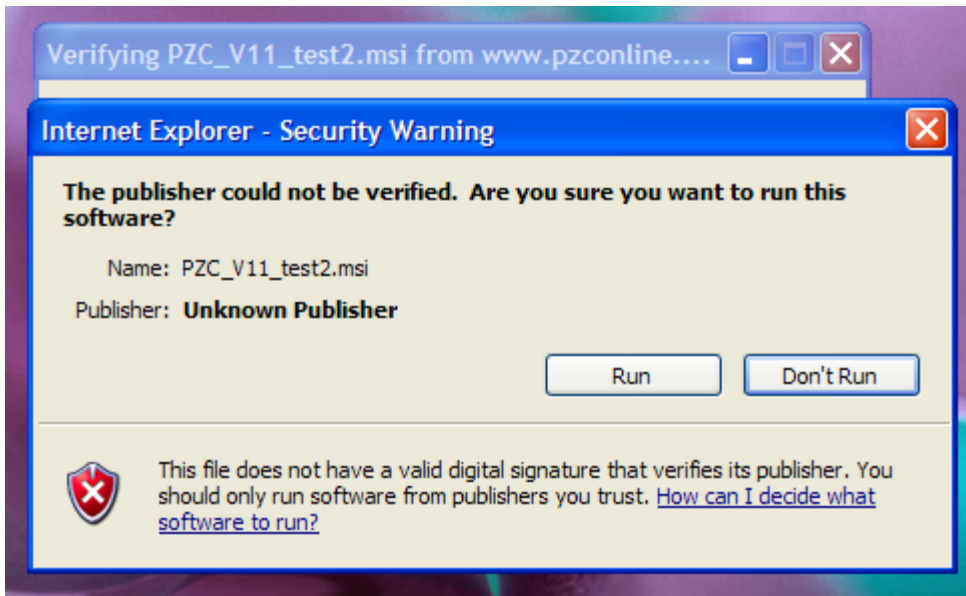
Once you have created your membership file, you are ready to install Project Zip Code!

Step One: Initializing the Installation Software

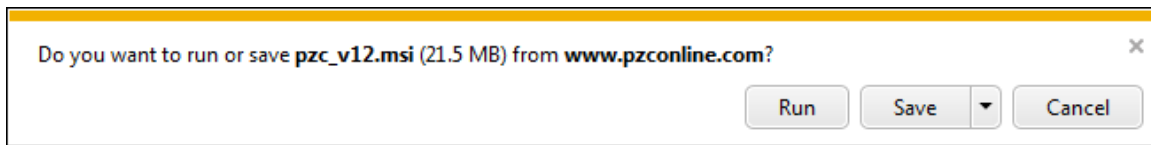
To install Project Zip Code please click on the following link: <http://www.pzconline.com/install/> and select the “Download PZC 12.0” icon. Do this by clicking [Run]. If you are running Internet Explorer 9.0 please continue to page 6 for installation instructions.



Once the program has downloaded to your computer, you will be asked to finish installing the program. Please click [Run] again.



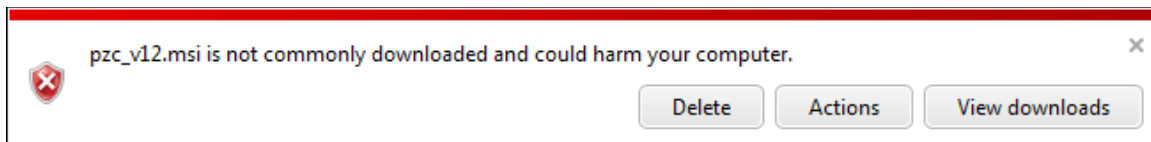
If you are running Internet Explorer 9.0, the following screen will appear at the bottom of your browser. Please click [Run].



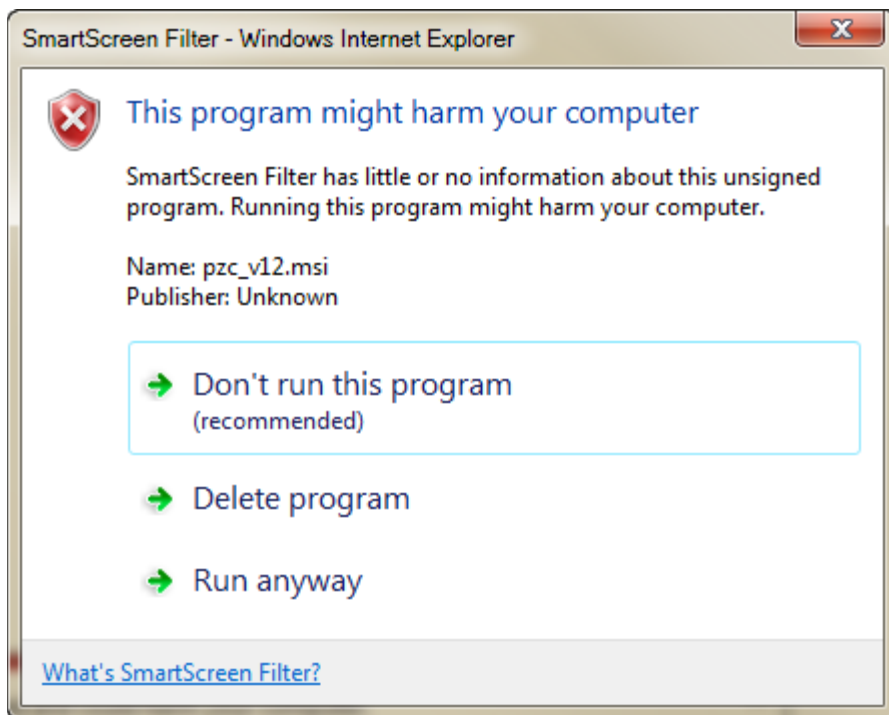
IE 9.0 will then run a security scan.



Once the scan is completed, you will be asked to approve the download. Click [Actions].

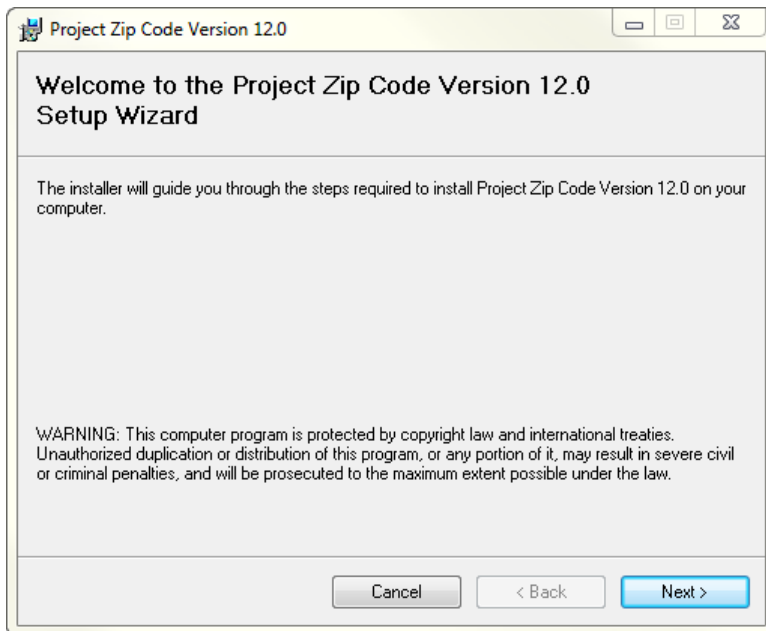


As Project Zip Code was created prior to Microsoft developing SmartScreen Filter, you will receive the message below. To finish downloading Project Zip Code, please click on [Run Anyway].

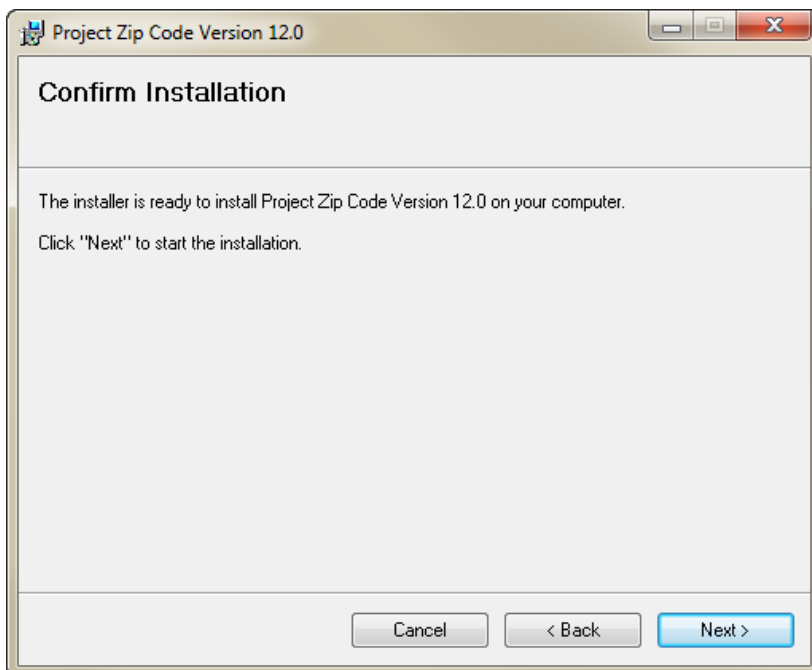


Step Two: Installing Project Zip Code

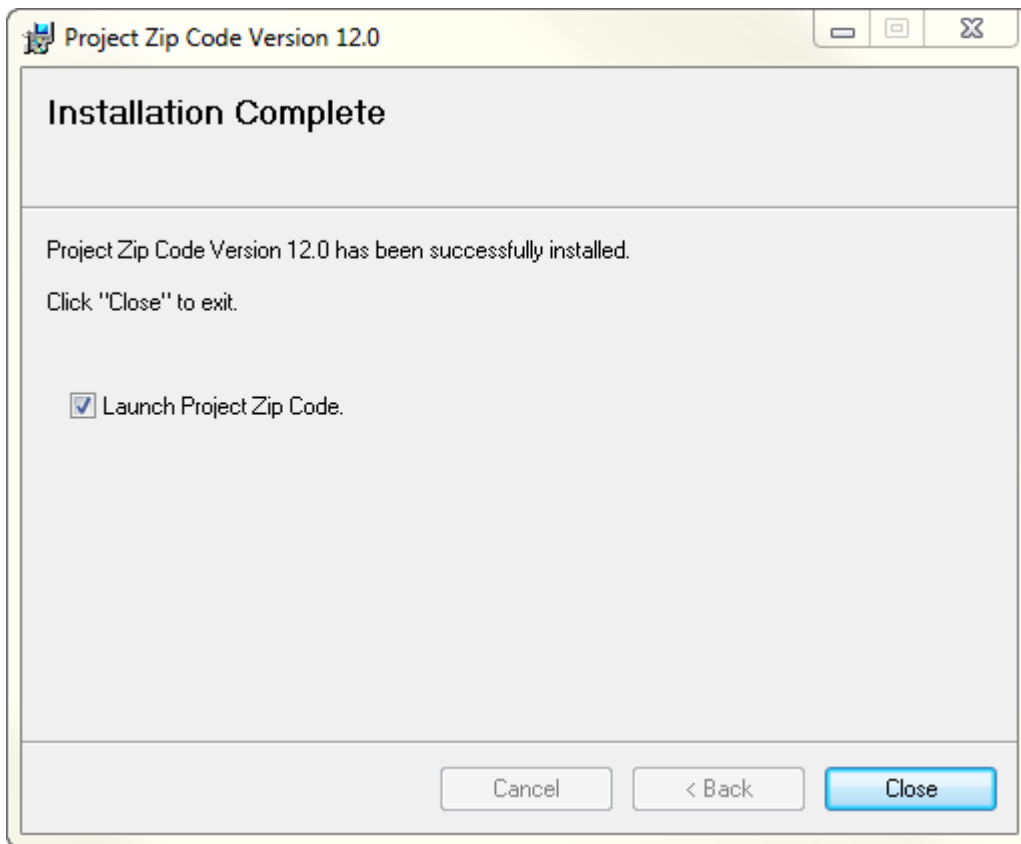
After the installation software has completed running, you are ready to install Project Zip Code 12.0 onto your computer. Please Click [Next].



Complete your installation of Project Zip Code by clicking [Next].



Congratulations, you have successfully installed Project Zip Code onto your computer! Click [Close] to automatically start Project Zip Code 12.0 so you can upload your data.

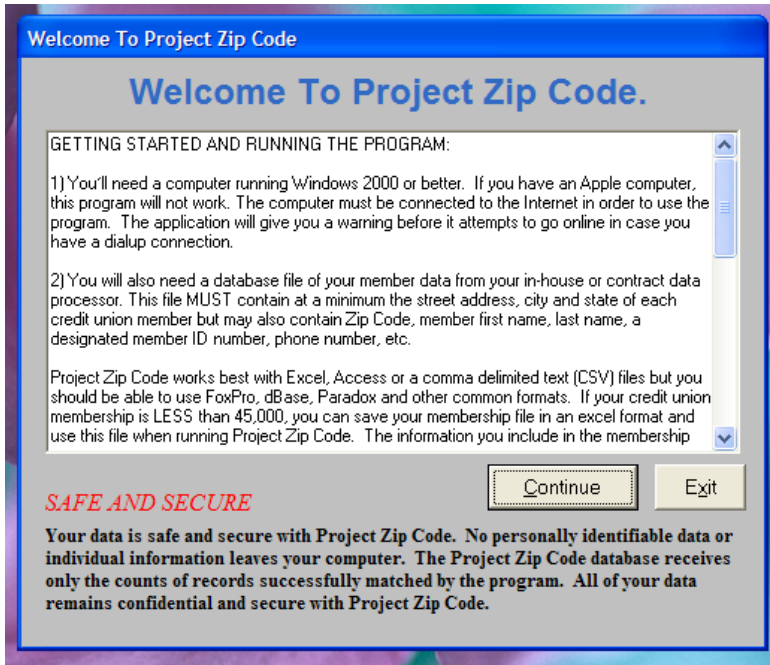


In addition to the screen above, an American flag icon will appear on your desktop. If the upload process does not immediately start, please double click on this icon to begin the upload.

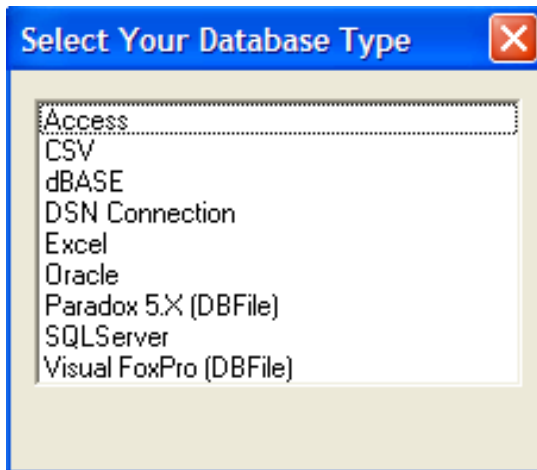


Step Three: Locating and Mapping Your Membership Data to Project Zip Code

Click [Continue] after you have reviewed the User Agreement.



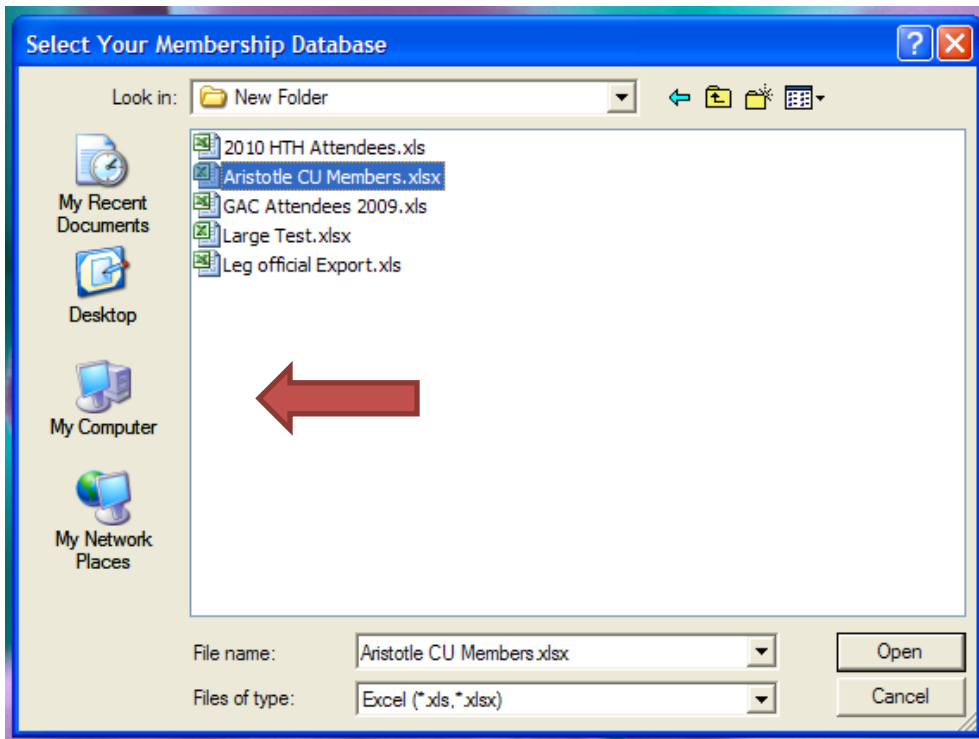
You will then be asked to select your database type. This is the database you created or exported prior to installing PZC. The most commonly used formats are Excel and CSV.



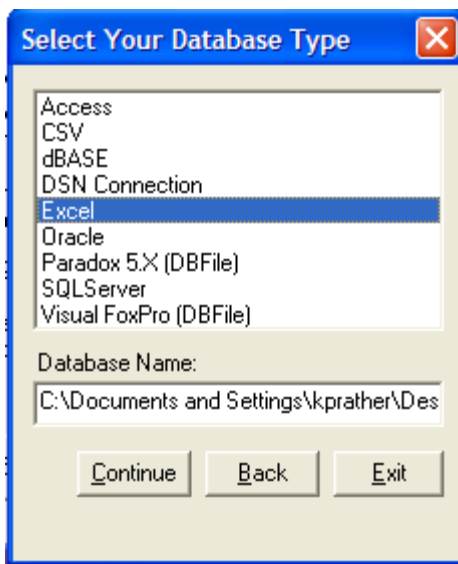
If you are uploading an Access or Excel file, PZC can accept Office 1998 – 2010 (or XLS and XLSX Excel files).

After you have selected the type of database you are uploading, you will need to tell PZC where the database is saved. In the example below the database is saved in “New Folder.” You can browse through your computer to find where the database is saved using the buttons on the left hand side of this screen.

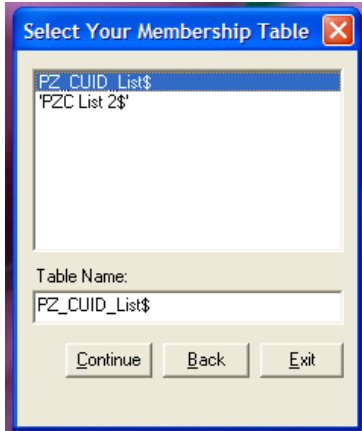
Once you have located your database please click “Open.”



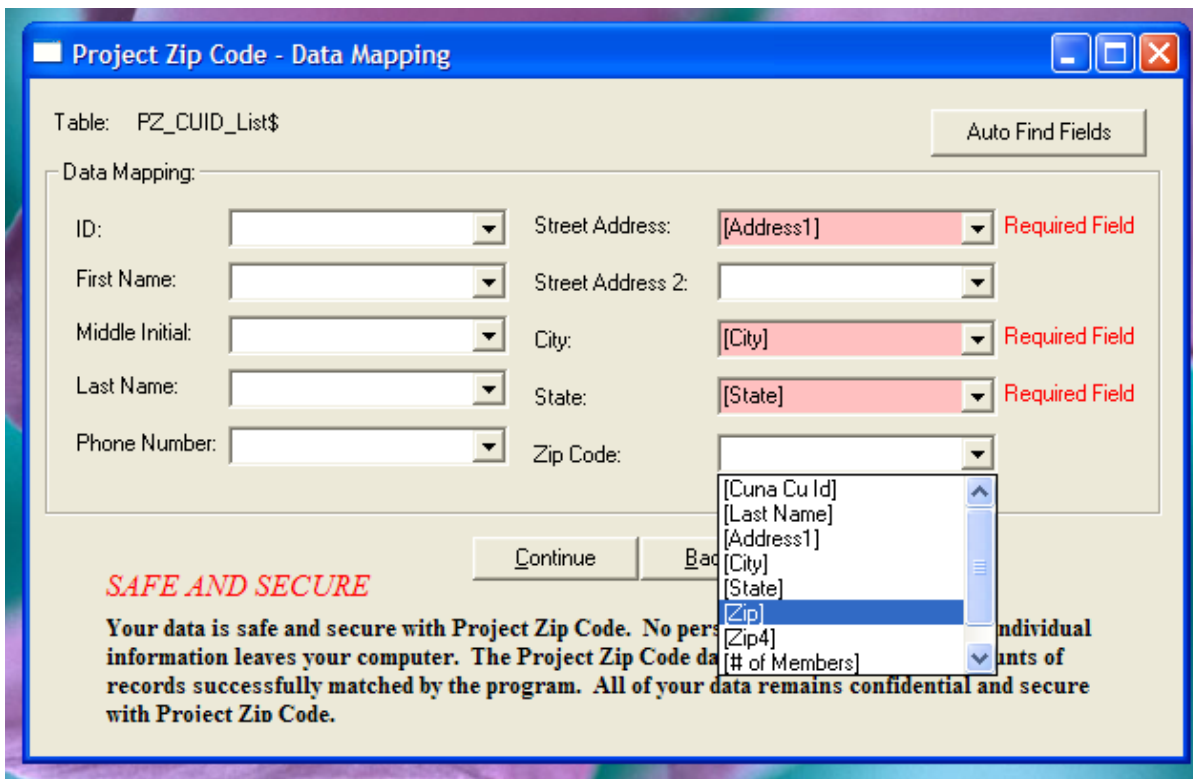
After you have selected where the membership data is saved, please confirm that the database type and location are correct it by clicking [Continue] on the screen below.



You will now select your Membership Table. If you are using an Excel or CSV document with multiple sheets, please note ahead of time which sheet contains your membership database. Click to highlight the correct sheet so that it displays at the bottom under “Table Name” and click [Continue].



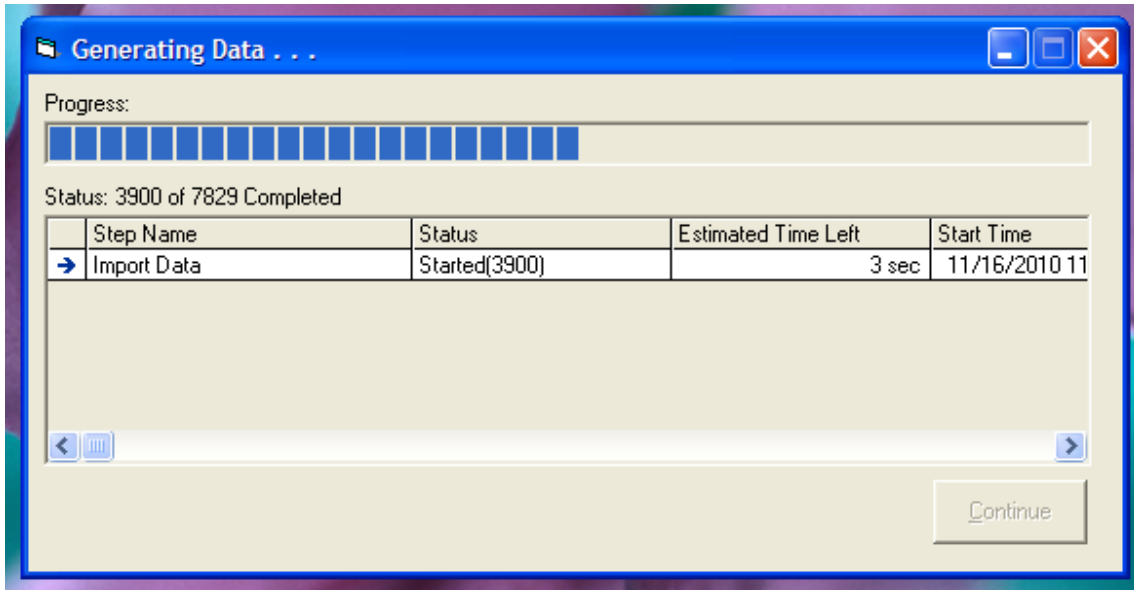
In Data Mapping you must tell Project Zip Code the names of the columns that contain your member addresses. The fields labeled “Required Field” and that appear in pink are mandatory fields. The easiest way for PZC to map these fields is by clicking “Auto Find Fields” in the top right-hand corner. Or, you can select from the pull-down menu which column names match the appropriate PZC fields. PZC will not map to the columns if you type in the column names. You must use the “Auto Find Fields” button or the pull down menus. Additionally, you may wish to include any other fields listed beside the white boxes to aid in your credit union marketing activities. None of the white fields will be transferred to the PZC secure server. These fields will be matched up after you download your encrypted PZC totals data table.



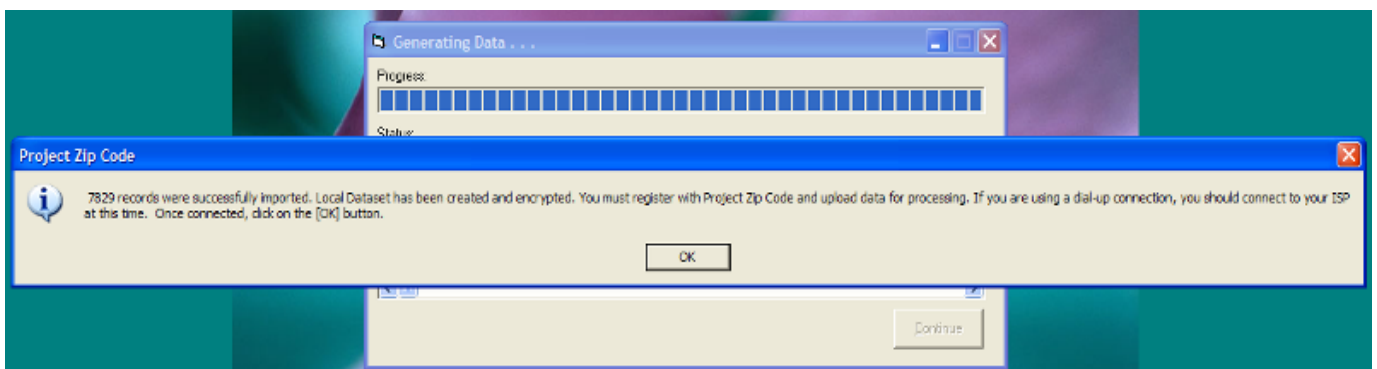
Once you have correctly mapped to the required fields and any others you choose, please click [Continue].

Step Four: Creating the Preliminary Data Set

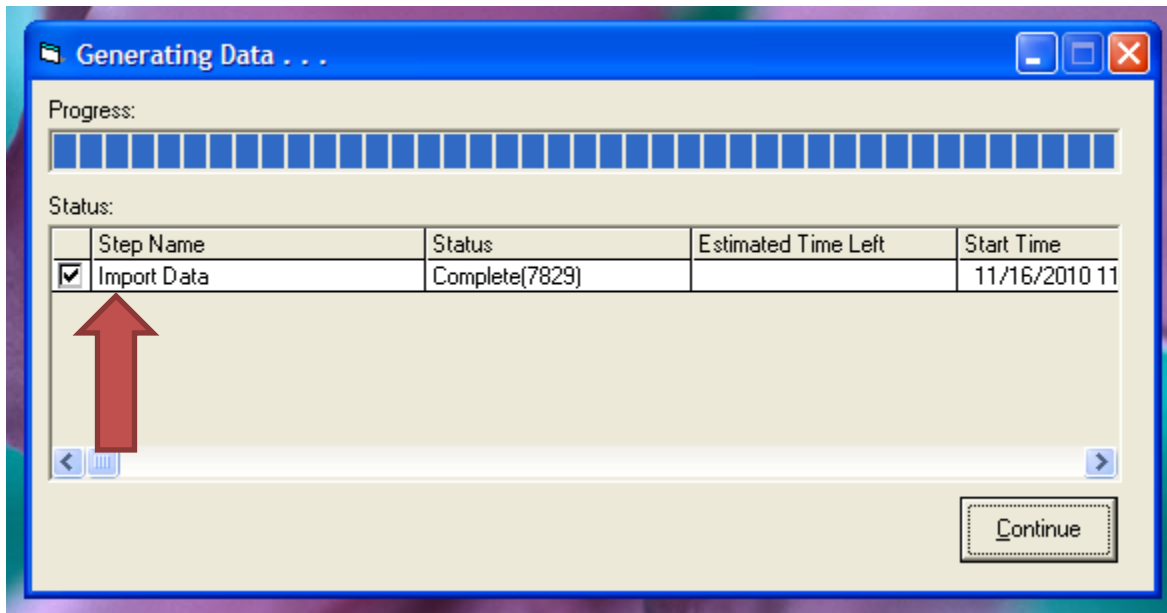
While PZC is generating data, it is simply counting the number of records in the database and creating a preliminary dataset that will be imported to the PZC Secure server. For larger databases this portion may take a minute or two.



Once the preliminary dataset has been created, you will be notified how many records were matched and asked to register with Project Zip Code to complete the upload. Click [OK] to continue.

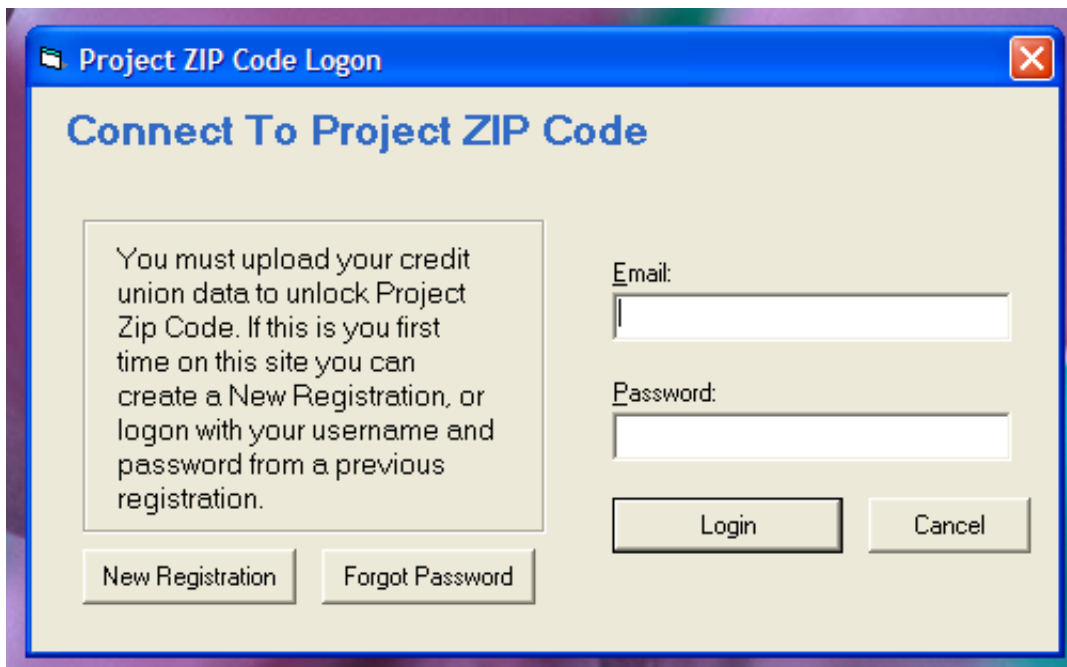


Be sure that the “Import Data” box is checked and click [Continue] to register and upload your data to PZC.

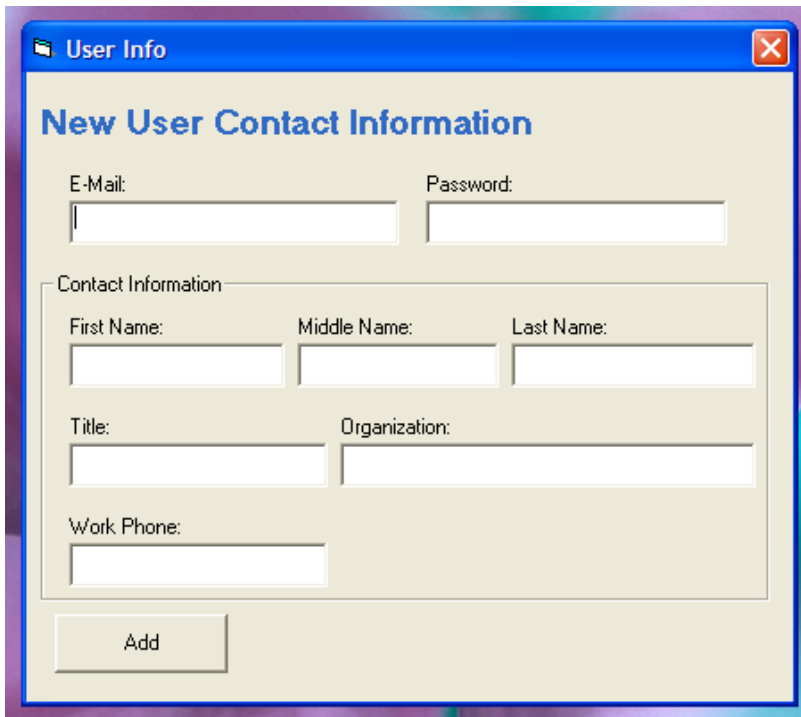


Step Five: Registering with Project Zip Code

You will now be asked to log-in to PZC. If you know your PZC email and password please enter it here and click [Login]. If you are a new user, please click on [New Registration]. If you have forgotten your PZC password, you may click on [Forgot Password] or simply register again under [New Registration].

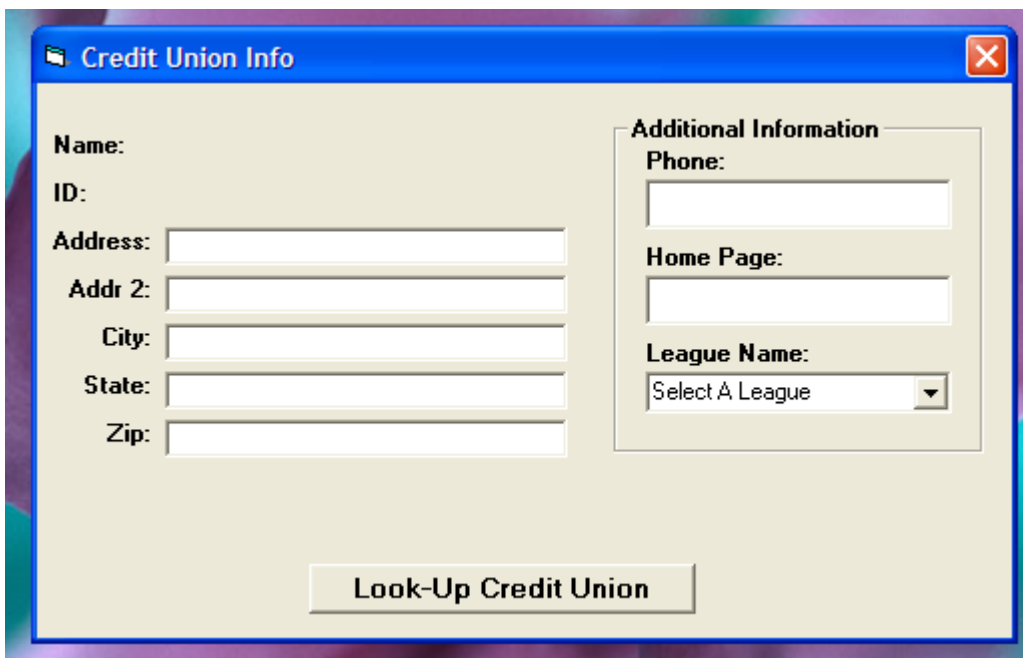


Please fill out the New User Contact Information completely. Also remember to keep a record of your password for when you download your encrypted PZC data table. Click [Add] when finished to continue.



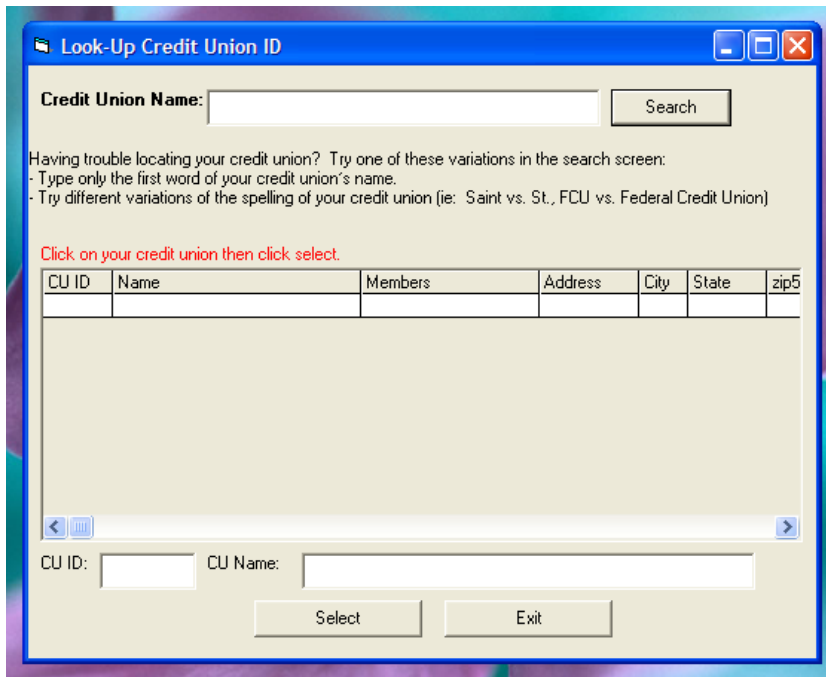
The screenshot shows a window titled "User Info" with a close button in the top right corner. The main heading is "New User Contact Information". Below the heading are two input fields: "E-Mail:" and "Password:". Underneath these is a section titled "Contact Information" which contains several more input fields: "First Name:", "Middle Name:", "Last Name:", "Title:", "Organization:", and "Work Phone:". At the bottom left of the window is a button labeled "Add".

After you have personally registered with PZC, you will be asked to register your credit union as well. Click on [Look-Up Credit Union].

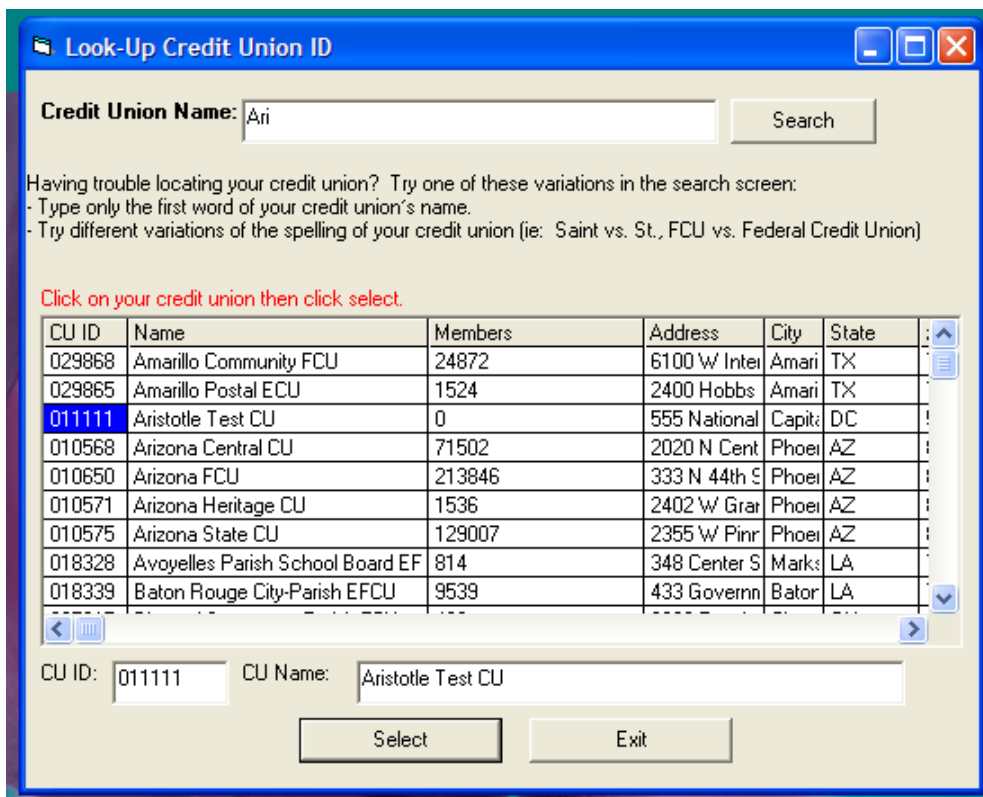


The screenshot shows a window titled "Credit Union Info" with a close button in the top right corner. On the left side, there are input fields for "Name:", "ID:", "Address:", "Addr 2:", "City:", "State:", and "Zip:". On the right side, there is a section titled "Additional Information" which includes input fields for "Phone:" and "Home Page:", and a dropdown menu for "League Name:" with the text "Select A League" and a downward arrow. At the bottom center of the window is a button labeled "Look-Up Credit Union".

To look up your credit union, please type in the first few letters of your credit union name into the “Credit Union Name” text box. Then you can click the [Search] button or simply press the [Enter] key.



Once the list of credit unions appears, highlight your credit union by clicking on the name. Then click the [Select] key to continue.



On this screen make sure all your credit union information is correct and be sure to select which League your credit union is affiliated with under “League Name.” If your information is correct and your League properly selected, click [Add Credit Union] to continue.

Credit Union Info

Name: Aristotle Test CU
ID: 011111
Address: 555 Nationals Way
Addr 2:
City: Capitals
State: DC
Zip: 55555

Additional Information
Phone:
Home Page:

League Name:
Select A League
Connecticut Credit Union As
Delaware Credit Union Leac
D.C. Credit Union League
Florida Credit Union League
Georgia Credit Union Affiliate
Hawaii Credit Union League
Idaho Credit Union League
Illinois Credit Union League

Add Credit Union

If this is not your credit union C)

Click [Upload] to initialize the connection to the PZC secure server.

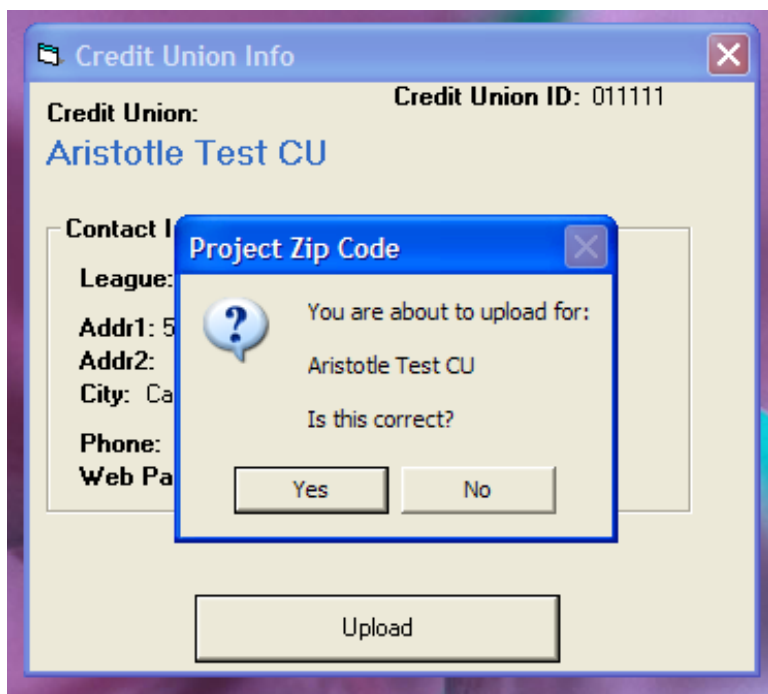
Credit Union Info

Credit Union: Aristotle Test CU
Credit Union ID: 011111

Contact Information
League: D.C. Credit Union League
Addr1: 555 Nationals Way
Addr2:
City: Capitals **State:** DC **Zip:** 55555
Phone:
Web Page:

Upload

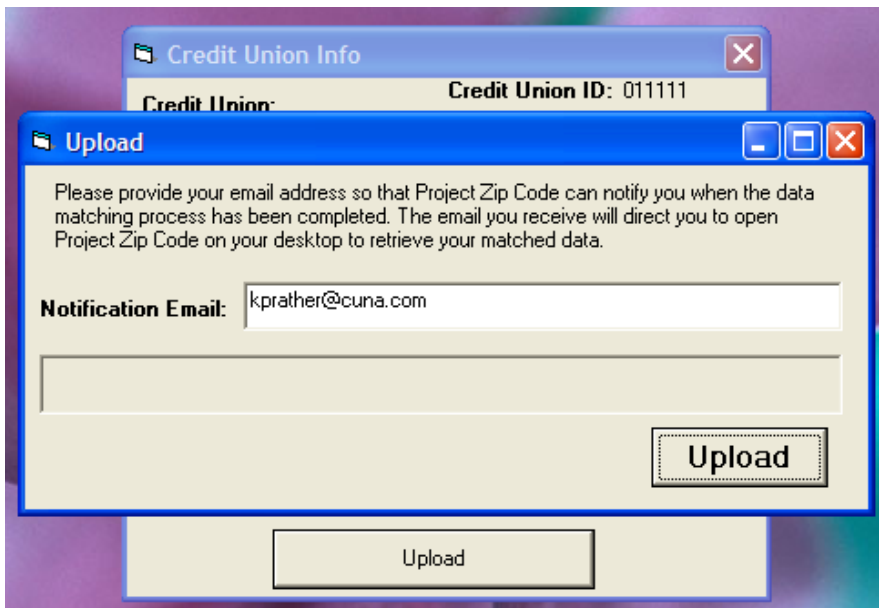
Click [Yes] to confirm connection to the PZC secure server and upload your membership data to the server.



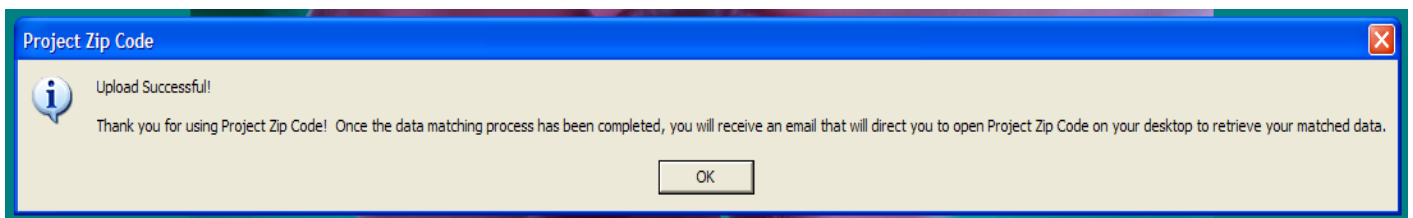
Step Six: Uploading you Data to Project Zip Code

Now that you have securely connected to the Project Zip Code server, you will be asked to upload your membership data. The only information being sent to the server is the preliminary dataset which contains member addresses and nothing else. This is a secure server and the data will be encrypted. The only thing that will remain in the Project Zip Code database is the membership counts per legislative district and county. Your data is safe and secure with Project Zip Code.

Since your membership dataset is being matched on the secure server, PZC will notify you when your encrypted membership information is ready for download. Please provide a working email address so we can notify you when the encryption is complete and you can download your totals. After entering the “Notification Email” please click [Upload] to send you totals to the PZC Secure server.



The message below will confirm your membership dataset has been sent to the secure server and is in the process of being matched to legislative districts and counties and encrypted. Please click [OK] to continue.



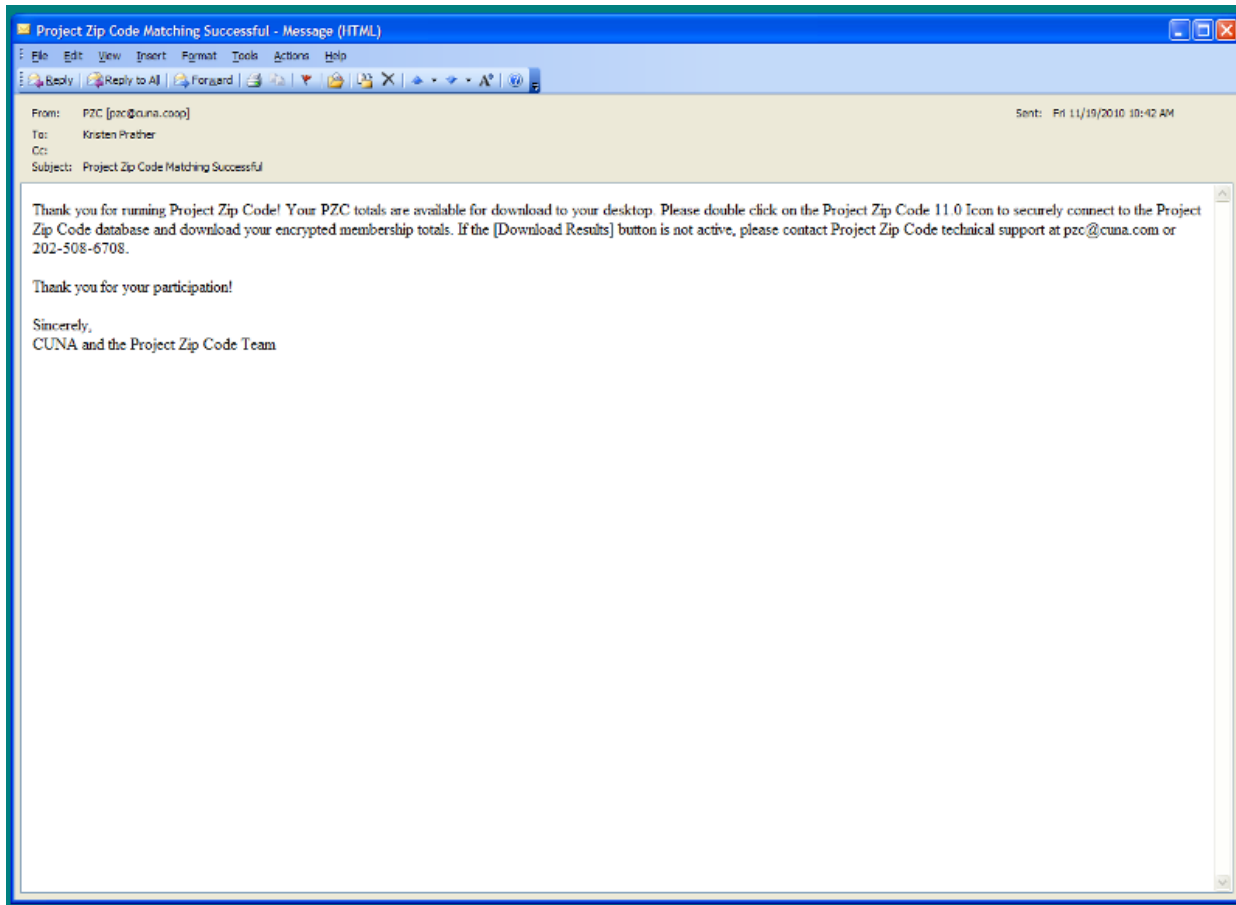
Once your data has finished the encryption and matching process, you will receive an email from Project Zip Code (PZC@aristotle.com) asking you to retrieve the encrypted data. The larger the uploaded file, the longer the process will take. For files containing 65,000 members, the encryption process takes around 5 minutes. For files containing over 1.5 million members, the process is around an hour. Please mind your inbox for the matching completed email from Project Zip Code. If you try to open Project Zip Code before the encryption process is completed, you will see the screen below and be unable to download your results until the process is finished.



Step Seven: Downloading your Encrypted Data

After your membership data has been encrypted and matched to the legislative districts and counties you will receive the email pictured on page 20.

Project Zip Code Matching Successful Email



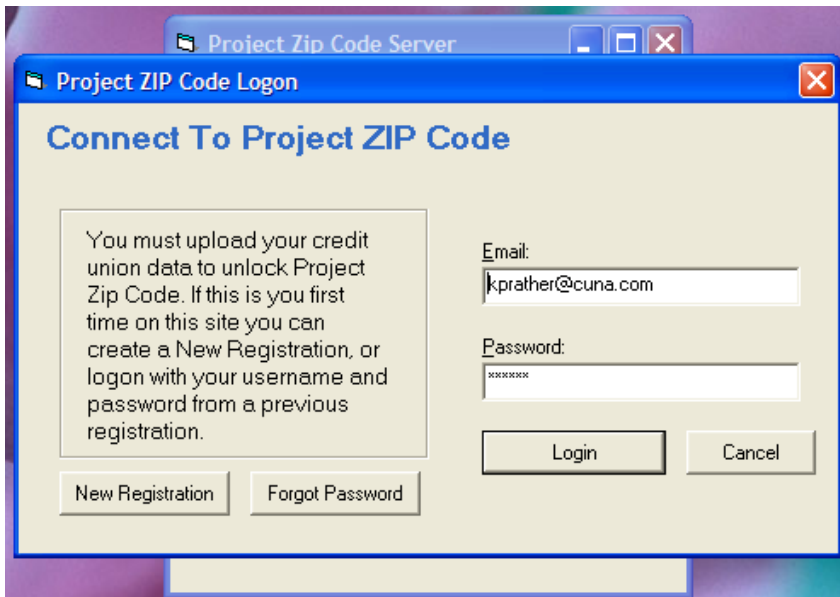
Please double click on the PZC icon on your desktop after receiving the email above.



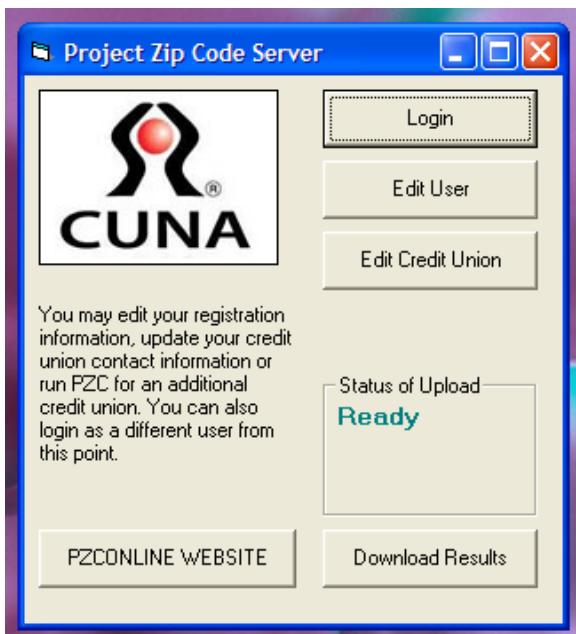
When this screen appears please click [Login].



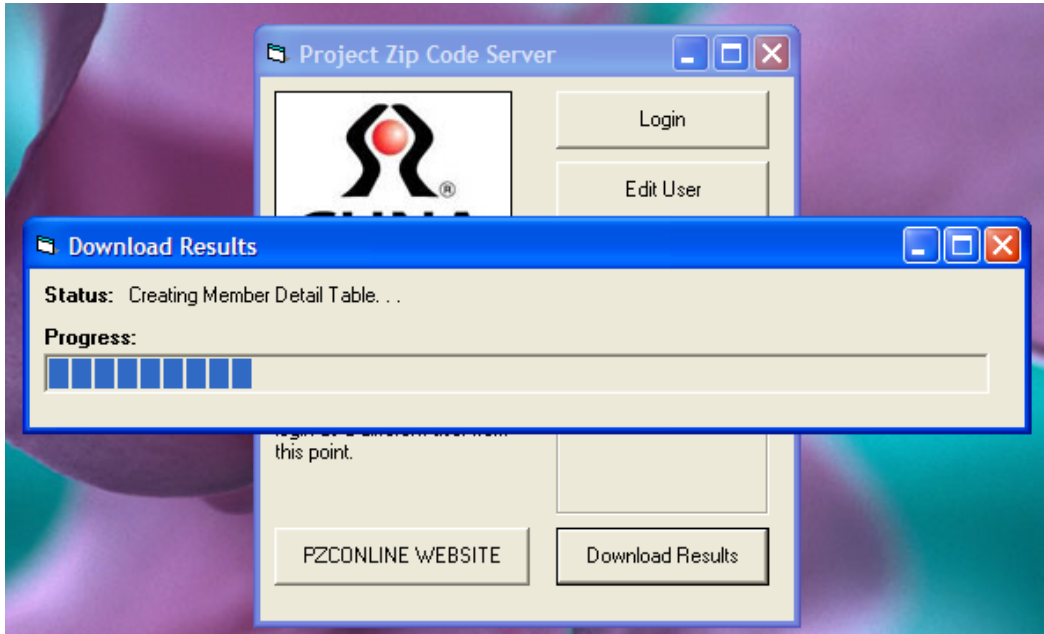
To log-in and download your membership data, please enter the email and password you used when registering with Project Zip Code. If you are only running PZC for one credit union, this information should appear in the “Email” and “Password” sections automatically. Once they are entered click [Login].



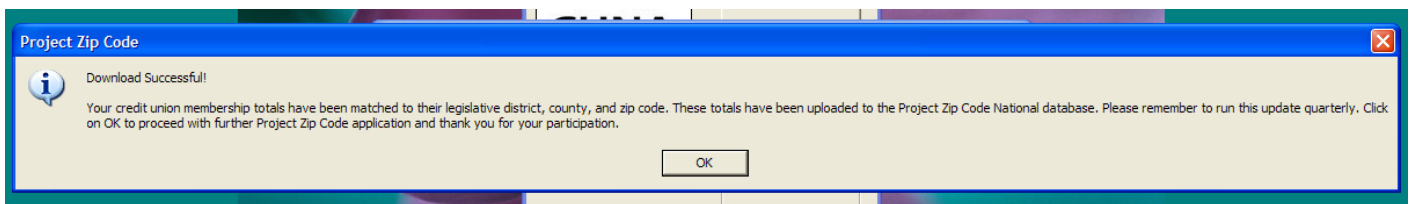
Underneath “Status of Upload” it should read “Ready” and you will be able to download your data. Click on [Download Results] to retrieve your data.



Depending on the size of the dataset uploaded to the PZC Secure server, it may take a few minutes to download your encrypted member table. The progress bar in the screen below will notify of the download status.



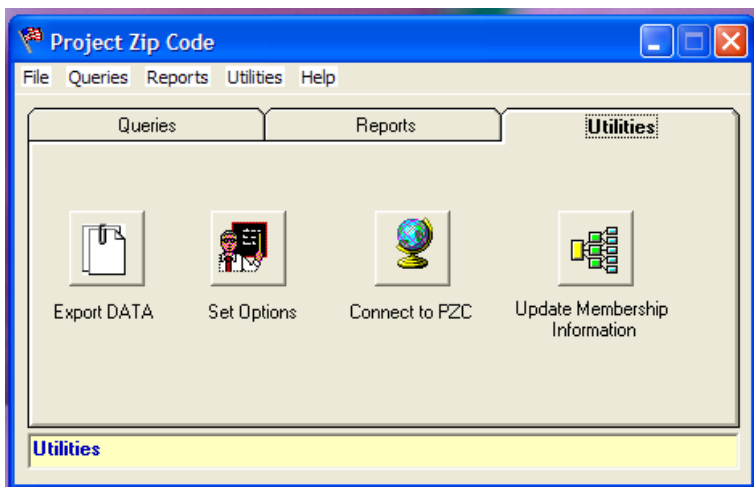
Once your encrypted member table has finished downloading you will receive a “Download Successful” message. Please click [OK] to continue.



Congratulations! You have successfully uploaded your totals to the PZC Secure server and PZC database and have successfully downloaded your encrypted member table. You are now able to use the PZC program to run queries and reports on your membership. The queries can be exported into CSV and Excel files and can aid your credit union in ATM placement and shared branching among many other marketing activities.



When it is time to update your membership information click on the “Utilities” tab and then click on [Update Membership Information].



For more information, please visit the Project Zip Code website at www.pzconline.com. There you will find detailed instructions on how to build queries and reports as well as updates on FAQs. If you have any questions or need technical assistance, please contact us at pzc@cuna.com or 202-637-7734.

Thank you for your participation in Project Zip Code!

PZC 12.0 Frequently Asked Questions

Q. If I have already run a previous version of Project Zip Code and I get an updated version, do I need to uninstall the previous version of PZC?

A. No, PZC version 12.0 will automatically uninstall prior version of Project Zip Code from your computer.

Q. What format does my membership file need to be in?

A. Your membership file can be saved in a number of formats. We recommend excel if you have less than 45,000 credit union members or comma delimited (.csv) if you have more than 45,000 credit union members. However, PZC works with several different formats.

Q. What information needs to be included in the membership file?

A. You must include the address, city, state, and zip in separate fields (or columns).

Q. When I am in the Data Mapping field there is nothing to select in the required fields, what should I do?

A. This means your database does not have the columns properly labeled. Go into your database and make sure that the first row lists the column names, i.e. address, state, city, etc. If it doesn't list the column labels, please add the labels in the first row, save your document, and go back to Select Your Database Type within the PZC program.

Q. Where do I find my database or membership file?

A. You should be able to get this information from your data processor (if applicable), or do a simple export from your system of a file that contains the required information (street address, city, state, zip).

Q. When I try to open up the PZC program after installation I am receiving an error message saying I am not connected to the internet, or that I need to install and XP patch?

A. This error most likely means a firewall or proxy setting is blocking PZC from connecting to the internet and allowing you to upload. First, please make sure that <https://www.pzconline.com/> is added to the list of "safe sites."

If adding the PZC site to your "safe sites" does not work, you may have to adjust your proxy settings. For Proxy settings make sure it is allowed to connect to the URL of www.pzconline.com. Port 80 and Port 443 will also have to be open. For the URL, the IP addresses you will need to use are 4.79.29.207 and 199.85.213.30

Q. How often should member data be uploaded?

A. You should upload data at least twice a year. You may want to do it on a quarterly basis.

Q. What do I do if the member database has active and non-active members?

A. You should export your member table as a .CSV or excel file with only the active members selected. Then you can use that file to match your member database.

Q. When I click on the PZC Icon after uploading to the secure server, I am unable to download my data.

A. Your data is still being processed and matched on the secure server. Wait to receive an email from pzc@cuna.com confirming your data has been matched and is available for download. If you do not receive an email within 24 hours please check your spam filter. If the notification email is not there, please contact pzc@cuna.com for assistance.

Q. Is Project Zip Code still available on CD if I have a slower internet connection?

A. Yes. You can obtain a Project Zip Code 12.0 CD by contacting your league or CUNA.

Q. Where can I go to find information on how PZC can help my credit union in our grassroots and marketing activities?

A. Please go to www.pzconline.com and click on “Support.” Here you will find additional user manuals and webinars designed specifically for PZC Queries and Reports which are beneficial in helping credit unions with grassroots and marketing.

Q. I have not received the latest CD of Project Zip Code, can I still run the program?

A. Yes, you can run PZC 12.0! Please go to <http://www.pzconline.com/install/> and click on Download Project Zip Code Version 12.0.

Contact Us:

CUNA
601 Pennsylvania Ave., NW South Building, Suite 600
Washington, DC 20004-2601
202-638-5777

Email: pzc@cuna.com