Project Zip Code

13951 • 01398 • 44126 • 22180 • 37631 • 85016 • 79189 • 20002 • 12459 • 22121 • 42973

Every Member Counts

Show the Credit Union Strength

Version 23.0

Table of Contents

About Project Zip Code:

What is Project Zip Code?

Project Zip Code (PZC) is a secure program created by CUNA and the Leagues to compile a national census of credit union members. Aiding in both federal and state advocacy efforts, PZC shows legislators the presence of credit unions across the country. Credit Unions provide the most essential piece to this tool: the data necessary to build it.

How does it work?

To participate in PZC, all you need is your members' street address, city, and state. On a secure, encrypted server, PZC will sort the addresses by Congressional district, state legislative district, and county, then transmit **only** these totals to the national database to be combined with the data from other CUs across the country.

Is my members' data secure?

Absolutely! Because individual information is never stored in the national database, you can be sure that no one outside of your organization will be able to view specific member data.

How will my members' information be used?

Member data will not be used any further than being counted and stored on the secure server. Once PZC calculates your CU's totals, they will be added to the existing database.

How does PZC help the CU movement?

PZC allows us to show legislators, in real numbers, how many of their constituents are CU members. Additionally, many CU members reside in states other than the state in which their credit union is domiciled, which is why it's so important that all credit unions participate.

Participation in PZC 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. The PZC software provides you with powerful tools to search and download this information.

To view the national database information please visit www.pzconline.com

THANK YOU for your participation in Project Zip Code!

Part 1

Create and Format Your Dataset

To run PZC, the street address, city, state, and, preferably, zip code of each member is required. You may need to consult with your database service provider, database manager or IT personnel to obtain this data.

Saving Your Data

step 1) After opening your dataset in excel, click [File] in the top left corner of the program. Select the [Save As] option

*step 2)* Click [Browse] and choose an easily accessible location to save your data

step 3) Type in a name for your file

step 4) Save file as .CSV (comma delimited text) by clicking the drop-down arrow below the file name

- o Other acceptable file types are: Access, Excel, SQL Servers, and Visual FoxPro (DBFile).
- o If your database is SQL Server, you will need the database server name as well

step 5) Click [Save]

- o Make sure to remember the name and location of your file for part two
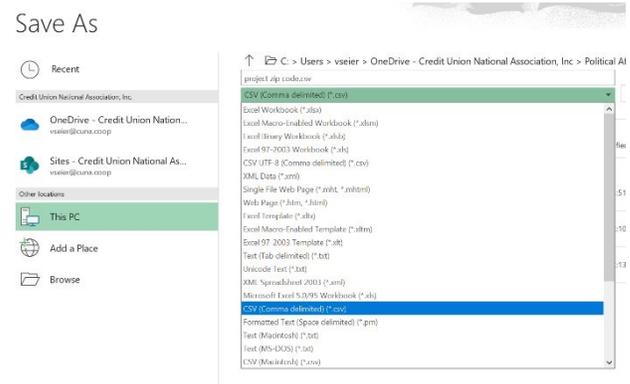
NOTE: special characters in the file name will interfere with the datamapping step. Use only letters and numbers when saving.
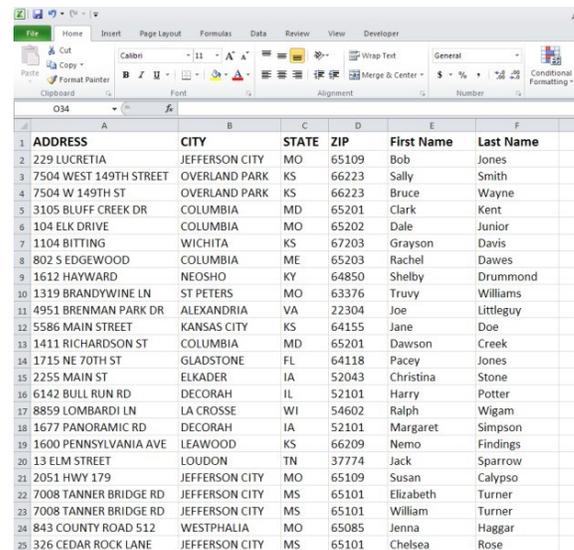
*No information beyond the street address, city, and state will ever be transferred to the Project Zip Code secure server.

Formatting Your Data

step 6) Each portion of the address must be broken down into separate, labeled columns, which should correspond to the data in each column.

	A	B	C	D
1	Street	City	State	Zip
2	123 Main St	Beverly Hills	CA	90210
3	12 3rd St	Plymouth	PA	18651
4	221 Candy Ave	Isanti	MN	55040

- o If you attempt to upload without column headers, PZC will not be able to sort your data
- o The number of digits in each zip code must remain consistent throughout the column (either all 5 digit or all 9 digits)
- o Note: sometimes files will have a second street address column, with information in only some of the column's cells. This is usually for apartment numbers. Delete this column – empty cells will prevent PZC from being able to process your data

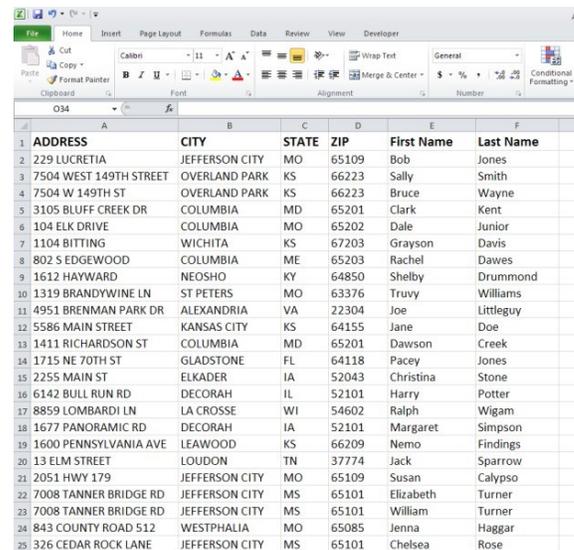|	A	B	C	D	E	F
1	ADDRESS	CITY	STATE	ZIP	First Name	Last Name
2	229 LUCRETIA	JEFFERSON CITY	MO	65109	Bob	Jones
3	7504 WEST 149TH STREET	OVERLAND PARK	KS	66223	Sally	Smith
4	7504 W 149TH ST	OVERLAND PARK	KS	66223	Bruce	Wayne
5	3105 BLUFF CREEK DR	COLUMBIA	MD	65201	Clark	Kent
6	104 ELK DRIVE	COLUMBIA	MO	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

*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.

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*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.

Part 2
Download and Install PZC

Windows Version 23

Download Project Zip Code

User Manual

Download Office 2007/2010 runtime files

Note: This is only required if you don't have Office 2007 or 2010 installed and you are going to import files in Office 2007/2010 formats (for example, import.xlsx or import.accdb).
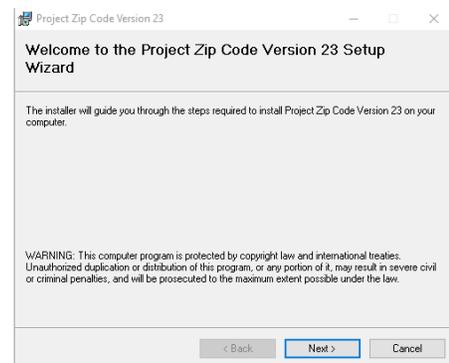
Download Office 2016 runtime files

Mac OS X

Download Project Zip Code

User Manual (Coming Soon)

Frequently Asked Questions

Privacy Statement

step 1) Click on the following link:
http://www.pzconline.com/install

step 2) Click the "Download PZC 23.0" under the header that corresponds to your operating system (PC or Mac)

step 3) Select [Next]

Project Zip Code Version 23

Welcome to the Project Zip Code Version 23 Setup Wizard

The installer will guide you through the steps required to install Project Zip Code Version 23 on your computer.

WARNING: This computer program is protected by copyright law and international treaties. Unauthorized duplication or distribution of this program, or any portion of it, may result in severe civil or criminal penalties, and will be prosecuted to the maximum extent possible under the law.

< Back   Next >   Cancel

step 4) PZC will default save to your C drive as shown. If you would like to save it elsewhere you can by clicking [Browse]. Once you've selected where to save PZC click [Next]

Project Zip Code Version 23

Select Installation Folder

The installer will install Project Zip Code Version 23 to the following folder.

To install in this folder, click "Next". To install to a different folder, enter it below or click "Browse".

Folder:
C:\Program Files (x86)\Aristotle\Project Zip Code Version 23\   Browse...

Disk Cost...

< Back   Next >   Cancel
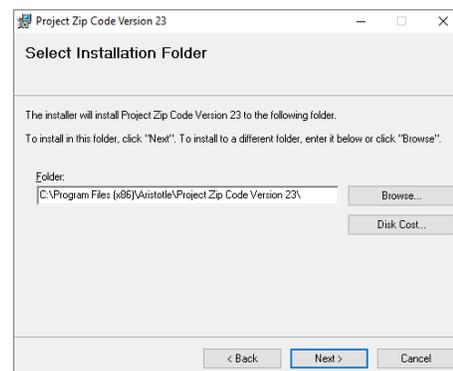
step 5) Click [Next] to complete the installation of PZC to your computer.
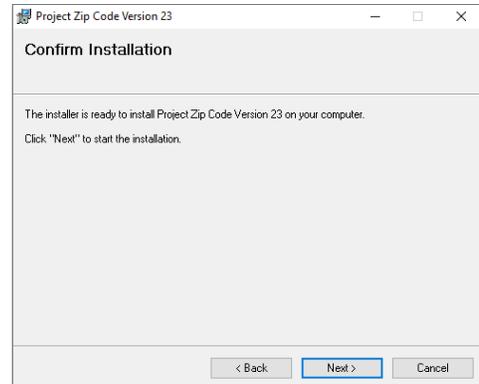
Once you see this message, you have successfully installed PZC!

- o If you would like to upload your data right away, and have your spreadsheet ready, click [Close] to automatically start PZC
- o If you would like to upload your data later, or still need to format your spreadsheet (part2) uncheck the box that says "launch Project Zip Code"
- o You can easily access and start PZC by clicking the American flag icon that automatically saved onto your desktop
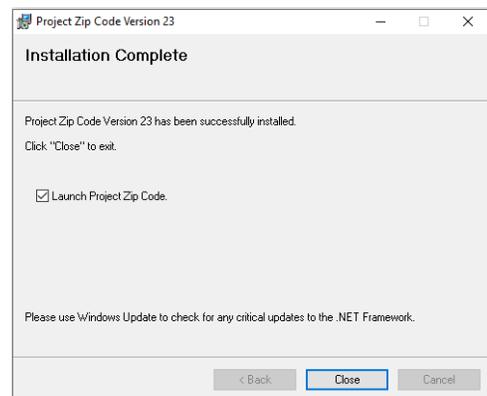
Part 3

Locate, Data Map, and Generate the Preliminary Dataset

Locate Your File

step 1) After opening PZC and reviewing the User Agreement click [Continue]
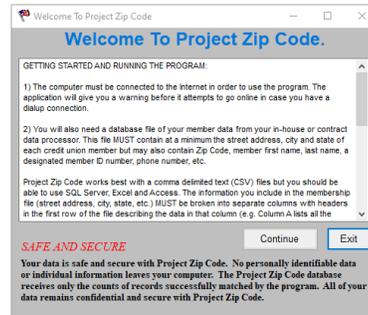
step 2) Choose .CSV (or whichever file type you saved your data as in Part 1)

o Only documents saved as the file type you select here will appear in the next step
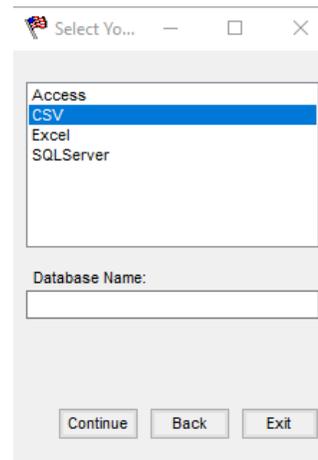
step 3) The file explorer dialogue box will open. Navigate to and select the file you created in part 1. Select [Open]

o If you do not see your file, click cancel to go back and select the correct file type option
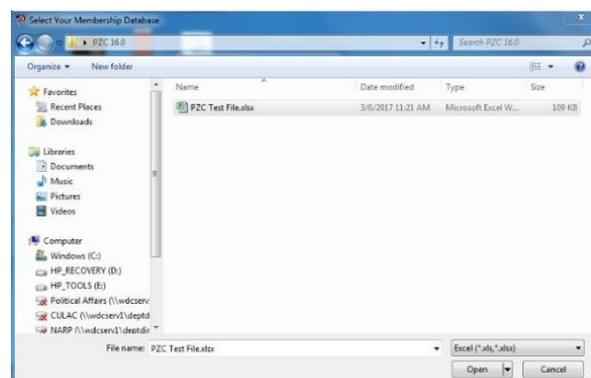
step 4) The location of the file you selected should appear under "Database Name," Click [Continue]
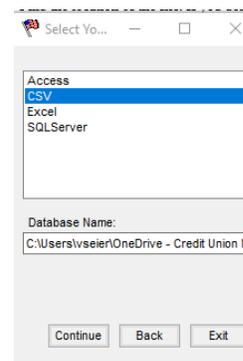
Data Mapping

In this step, you need to tell PZC what information each column contains so the program can accurately sort through your membership.

step 5) Follow one of the two steps below to fill in the required fields

- Click [Auto Find Fields] and your column headers should populate in the boxes

  OR

- Click the drop-down arrow on the right side of each field and select the corresponding column title

*If you try both options and neither displays text in the fields, your spreadsheet is likely missing column headers. Return to Part 1 to add them.

*Manually typing in each column name will result in error
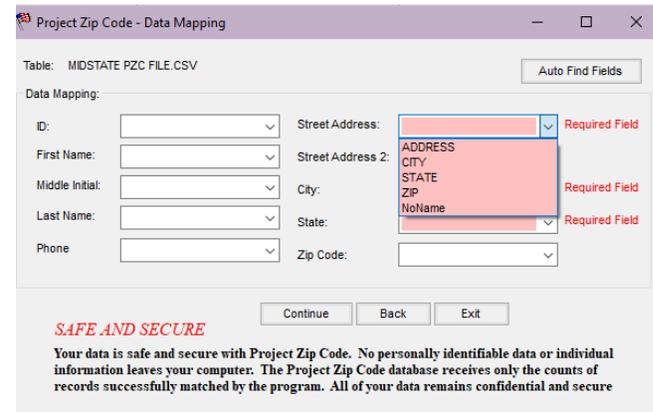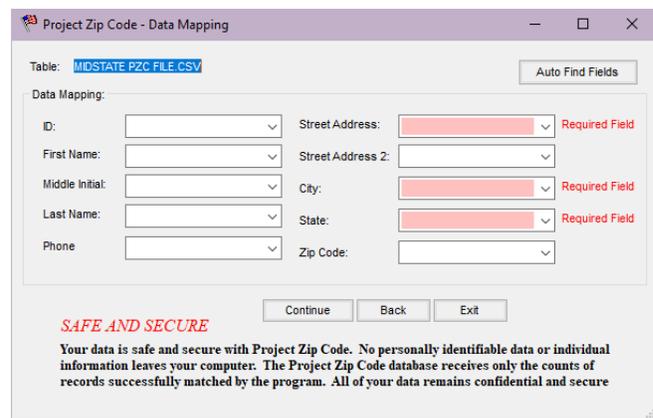
step 6) Once all the required fields are filled in, click [Continue]. A green progress bar will pop up

     o In this step PZC is sorting through your data and generating a preliminary dataset for you to upload to the PZC secure server

     o It may take 1-2 minutes for PZC to count and generate the data. Larger files may take longer.
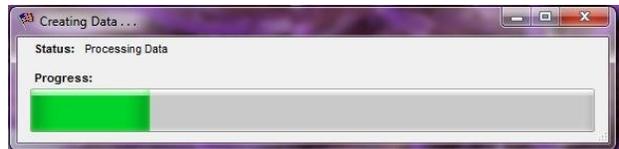
step 7) When PZC has finished generating the preliminary dataset, a confirmation window will pop up with the record count. Click [OK], and the PZC log in screen will appear
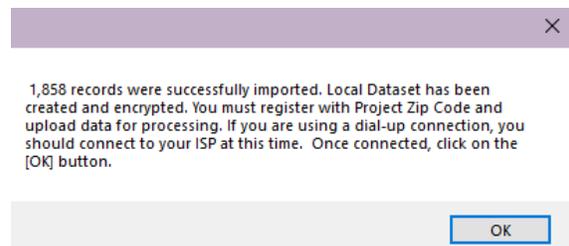
*This step will not count any records if your data doesn't contain headers

Part 4
Sign in and Upload

Logging into PZC

Existing Users:

o If you're able to log in to your previously used PZC account, do so, and move on to part 4/step 6

o Forgotten password- If you still have access to the email address associated with this PZC account, click [Forgot Password] and your log in information will be sent to that email

o Still not working- If you no longer have access to the email address associated with this PZC account or are unable to log in for any other reason, follow the steps to register as a new user.
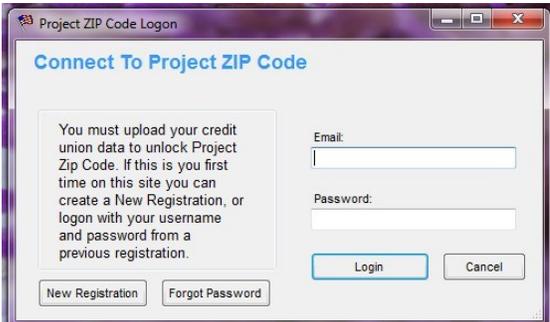
New Users/Users Unable to Log In:

o Select [New Registration] and fill out the New User Contact Info completely. Click [add] and then log in

o Make sure you keep record of your log in information. You will need it to download your encrypted PZC data table
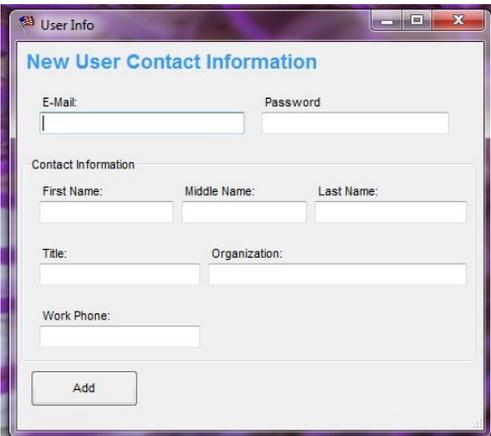
Find/Add Credit Union

Existing Users: If you are uploading a CU's membership data for the first time, you must add it to your account. Select [NEW] and then follow from step 2.

*Note: use the arrows to scroll through CUs you have previously run PZC for

step 1) Select [Look up Credit Union]

step 2) Type in the first few letters of your CU's name, click [search]

step 3) Find and click your CU to highlight, press [select]

step 4) All fields will auto populate EXCEPT the league field. Please make sure to click the league drop down and select appropriately

step 5) Once you've checked over that information for accuracy, click [Add Credit Union]
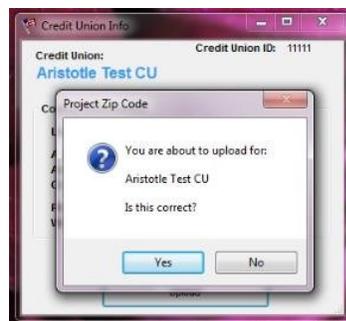
Upload Data to Secure Server

Next, you will connect to the PZC secure server and upload the dataset created in Part 3
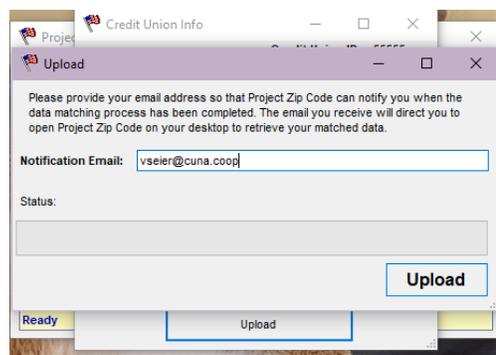
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step 6) Select [Upload] to initialize connection to the PZC server

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step 7) Click [Yes] to confirm connection to the PZC secure server and upload your membership data


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step 8) Enter the email address you would like PZC to notify once the encryption is complete and your totals are be available for download. Select [Upload]

step 9) Select [OK] once your upload has been sent to the secure server

*Note: this message is only confirming that your upload was received. Now PZC will take some time to match it to legislative districts and counties, encrypt the data, and THEN you will receive the email that it's ready to download.
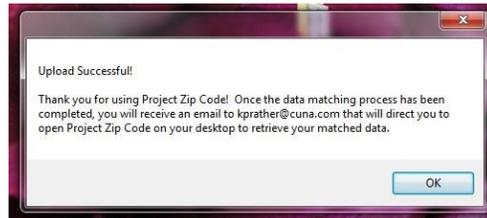
If you try to open the desktop version of PZC before the encryption process is completed, your screen will show the status of upload as "processing." Please wait to receive the email confirming encryption was successful. If several hours pass with no email, please reach out to pzc@cuna.coop for assistance.

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

Part 5
Downloading Your Encrypted Data

Congratulations! Once you receive this email, your totals have successfully uploaded to the PZC secure server. Follow the steps below to download your data.

Thank you for running Project Zip Code! Your PZC totals are available for download to your desktop. Please double click on the Project Zip Code icon on your desktop to securely connect to the Project Zip Code database and download your encrypted membership totals.
If the [Download Results] button is not active, please contact Project Zip Code technical support at pzc@cuna.com or 202-508-6708.

Thank you for your participation!

Sincerely,
CUNA and the Project Zip Code Team

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step 1) Open PZC by double clicking on the American flag desktop icon and log in
   o The status of upload should have updated from "processing," to "ready"

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step 2) Select [Download Results] in the bottom left corner of the screen

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step 3) This will take a few minutes; the progress bar will track the status. Larger files will have longer download times

step 4) Once your encrypted member table has finished downloading you will receive a "Download Successful" message. Click [OK] to continue.
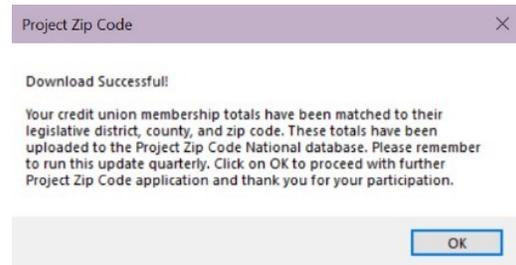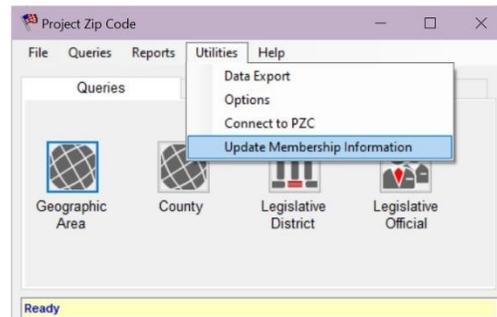
step 5) You can now use the PZC program to run and export queries and reports on your membership.
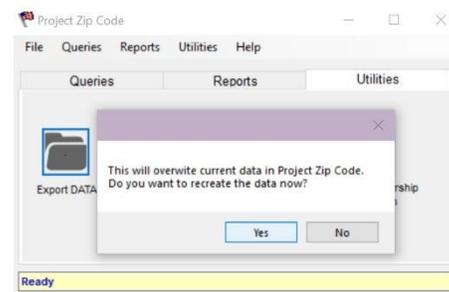
step 6) When it is time to update you CU membership information again click on the Utilities tab and then select [Update Membership Information]
  o We recommend updating annually

step 7) Select [Yes]. Each time you update member information, the previous uploaded data will be overwritten.

PZC 23.0 Troubleshooting / 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 23.0 will automatically uninstall any prior versions of Project Zip Code from your computer.

Q. When I try to open 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 address you will need to use is 199.85.213.30

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

A. PZC works best with a comma delimited text (CSV) files but you should be able to use SQL Server, Excel and Access.

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. 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. I have received the preliminary dataset, but the number of records is much higher than what I know to be our membership to be.

A. Make sure when exporting your member table, you are only exporting MEMBERS, not ACCOUNTS, as members can have multiple accounts.

Q. What if our CU changes names or merges?

A. Email CUNA staff or pzc@cuna.coop with any name changes or mergers.

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. How often should member data be uploaded?

A. You should upload data at least once per year to maintain up-to-date membership counts.

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 23.0 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 https://www.pzconline.com/support Here you will find additional user manuals designed specifically for PZC Queries and Reports which are beneficial in helping credit unions with grassroots and marketing.