Project Zip Code 14.0

Queries and Reports



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Table of Contents

Topic	Page
Using Your Data	3
Queries	4
Reports	10
Utilities	14

Using Your Data

At the conclusion of the file upload, you will have various options for searching and viewing your credit union data. While the required fields are all that is needed to complete the Project zip Code district matching process, most users find it helpful in their marketing activities to include additional fields. One of the most common is names so that mail merge tables and reports can be quickly created.



Queries

Queries were designed specifically for exporting the data from your Project Zip Code upload into several formats including Excel and .csv.

Searching by Geographic Area

Clicking on the geographic area icon produces the following window. By selecting a state, the number of zip codes within that state present in the database will appear. You can search multiple states and zip codes within one query and choose how the data is displayed.

🏁 Project Zip Code - Query By Geograph	ic Area
States:	State Zip5 Codes:
Arkansas 🔺	Select All Clear
Florida	
Illinois	AR - 71602
Indiana	AR - 71603
lowa	AR - 71660
Kansas	AR - 71961
Nebraska	AR - 72110
Nebrusku	AR - 72113
	AR - 72114 AD 72115
SelectAll	AR - 72115 AP - 72116
	AR - 72117
	AR - 72118
Query Options	AR - 72120
Query	AR - 72370
ubery	AR - 72450
Member Address	AR - 72560
Member Address	AR - 72949 👻
Member Counts	
Last Name 👻	Query Selected Zip5

Click on the [Query Selected Zip5] button when the selections meet your requirements. The program will process the data and a browse table will show the results.

Searching By County

You will also be able to search by county and see the number of members listed in each county you select. This query may be sorted by fields that were originally mapped including last name, city, state, and zip code.

States:	Counties
Arkansas	Select All Clear
Florida	
Illinois	AR - Cleveland County
Indiana	AR - Conway County
lowa	AR - Franklin County
Kansas	AR - Greene County
Missouri	AR - Jefferson County
Nebraska	AR - Mississippi County
	AR - Montgomery County
Select All Clear	AR - Pulaski County
	AR - Stone County
Query Options	IN - Adams County
Query Options	IN - Allen County
Query	IN - Bartholomew County
Member Counte	IN - Benton County
weinber counts 👻	IN - Blackford County
Sort	IN - Boone County
Last Name 👻	OK

Searching By Legislative District

You will also be able to search by legislative district and see legislator names in the selection windows (depending on query option). In addition users are now able to search multiple levels of legislators. In the query below US House and State Senate legislators are queried.

States:	Districts
Arkansas 🔺	Select All Clear
Florida	
Illinois	AR - Congressional District 1
Indiana 😑	AR - Congressional District 2
lowa	AR - Congressional District 3
Kansas	AR - Congressional District 4
Missouri	AR - Senate District 3
Nebraska 🔻	AR - Senate District 5
	AR - Senate District 10
Select All Clear	AR - Senate District 11
	AR - Senate District 15
	AR - Senate District 18
	AR - Senate District 23
Levels:	AR - Senate District 27
U.S. Senate	AR - Senate District 31
U.S. House	AR - Senate District 34
State Senate	FL - Congressional District 1
State House	FL - Congressional District 2
	FL - Congressional District 3
	FL - Congressional District 4
Select All Clear	FL - Congressional District 5
	FL - Congressional District 6
	FL - Congressional District 7
Query Options	FL - Congressional District 8
Quepr	FL - Congressional District 9
aucry	FL - Congressional District 10
Member Address +	FL - Congressional District 11
	FL - Congressional District 12
Sort	

Click on the [OK] button when all the selections meet your requirements.

A report showing total "Member Counts" is now generated.

By: Last 1 rds: 235	a Query: lame AR - Congre District 10, A	ssional District 1, AR - Cor R - Senate District 11, AR	ngressional District - Senate District 15	2, AR - Congressional District 3, AR - Congressional District 4, AR - Senate District 3, AR - Senate District 5, AR - Senate 5, AR - Senate District 18, AR - Senate District 23, AR - Senate District 27, AR - Senate District 31, AR - Senate District 30, AR - Senate Distri
State	StateCode	District	totals	
Arkansas	AR	Congressional Di	4	
Arkansas	AR	Congressional Di	36	
Arkansas	AR	Congressional Di	2	
Arkansas	AR	Congressional Di	18	
Arkansas	AR	Senate District 3	2	
Arkansas	AR	Senate District 5	1	
Arkansas	AR	Senate District 10	1	
Arkansas	AR	Senate District 11	2	
Arkansas	AR	Senate District 15	1	
Arkansas	AR	Senate District 18	2	
Arkansas	AR	Senate District 23	15	
Arkansas	AR	Senate District 27	1	
Arkansas	AR	Senate District 31	25	
Arkansas	AR	Senate District 34	8	
Florida	FL	Congressional Di	441	
Florida	FL	Congressional Di	449	
Florida	FL	Congressional Di	116	
Florida	FL	Congressional Di	274	
Florida	FL	Congressional Di	800	
Florida	FL	Congressional Di	386	
Florida	FL	Congressional Di	384	
Florida	FL	Congressional Di	164	
Florida	FL	Congressional Di	624	
Florida	FL	Congressional Di	307	
Florida	FL	Congressional Di	441	
Florida	FL	Congressional Di	446	
Florida	FL	Congressional Di	228	
Florida	FL	Congressional Di	413	
Decide				

From here, or from any of the Queries you choose to create, you can export this information to a CSV or other program of your choice. Simply click on the [Export Query] button (indicated by the red arrow).

ery rt E cor	District By: Last Name (ds: 235	Query: AR - Congres District 10, A	ssional District 1, AR - Co R - Senate District 11, Al	ongressional District 2, AR - Congressional District 3, AR - Congressional District 4, AR - Senate District 3, AR - Senate District 5, AR - Senate District 34, IAR - Senate Distric
	State	StateCode	District	totals
	Arkansas	AR	Congressional Di	4
	Arkansas	AR	Congressional Di	36
	Arkansas	AR	Congressional Di	2
	Arkansas	AR	Congressional Di	18
	Arkansas	AR	Senate District 3	🖳 Export Data
	Arkansas	AR	Senate District 5	
	Arkansas	AR	Senate District 10	Step 1 - Select Output Data
	Arkansas	AR	Senate District 11	User Defined Query
	Arkansas	AR	Senate District 15	
	Arkansas	AR	Senate District 18	
	Arkansas	AR	Senate District 23	Alexander Constantia Ella
	Arkansas	AR	Senate District 27	Step 2 - Create Output File
	Arkansas	AR	Senate District 31	Create File
	Arkansas	AR	Senate District 34	
	Florida	FL	Congressional Di	Step 3 - Export Data
	Florida	FL	Congressional Di	Output Progress
	Florida	FL	Congressional Di	
	Florida	FL	Congressional Di	
	Florida	FL	Congressional Di	
	Florida	FL	Congressional Di	Export Cancel
	Florida	FL	Congressional Di	
	Florida	FL	Congressional Di	1164
	Florida	FL	Congressional Di	624
	Florida	FL	Congressional Di	307
	Florida	FL	Congressional Di	441
	Florida	FL	Congressional Di	446
	Florida	FL	Congressional Di	228
	Florida	FL	Congressional Di	413
	R . 11			736

This Screen will then appear and ask you where you would like to save the file and what you would like to save the file as. Click on [Create File] or in the white text box.

10	StateCode	District	totals			
ama	AL	Congressional Di	2			
ima	AL	Congressional Di	2			
ama	AL	Congressional Di	1			
ama	AL	Congressional Di	4			
ama	AL	Congressional Di	1			
ona	AZ	Congressional Di	4			
na	AZ	Congressional Di	3			
ona	AZ	Congressional Di	3			
ona	AZ	Congressional Di	7			
ona	AZ	Congressional Di	18			
ona	AZ	Congressional Di	2		🖳 Export Data	
ona	AZ	Congressional Di	3			
ona	AZ	Congressional Di	15		Step 1 - Select	Output
ona	🖳 Save As	in succession.				
nsas		PZC 14.0			✓ ▲ Search PZC 14.	0
ansas			-			-
ansas	Organize 🔻	New folder				
ado	📃 Desktop	•		AL 20 1.1		
orado	🚺 🚺 Downlo	ads		No items match your search.		
orado	🗘 💔 Dropbo	κ E				
orado	📃 Recent	Places				
orado						
orado	📜 📜 Libraries					
	Docum	ents				
	J Music					
	Pictures	Ŧ				
	Filer	ame: Legislator Re	pot 1-3-2014			
	Save as	type: CSV Comma	delimited (*.csv)			
	001005					

When this screen appears, select where you want to save the file, the type of program you want to save it as, and give the file a name. (In this example the file has been named Legislator Report 1-3-2014.csv.")

🖳 Export Data	
Step 1 - Select Output Data	
User Defined Query	_
Step 2 - Create Output File	
C:\Users\kprather\Desktop\PZC 14.0\Legislator	Create File
Step 3 - Export Data	
output Progress	
Export	Cancel

Click on the [Export] button to finalize the export of your data.

Σ	
Export to C:\Users\kprather\Desktop\PZC 14.0\Legislator Report.csv Complete	
ОК	

Click [OK] in the new window that tells you where your Export file has been saved. Click [Close] to exit the Export window and continue creating new Queries.



Searching By Legislative Official

In this example the states selected are Arkansas and South Dakota. The legislator levels selected are the U.S. Senate and the U.S. House. You can then select the members that you want to query and the sort order that you want to see the information reported. Click on the [OK] button and the information will be displayed.

Project Zip Code - Query By Leg	islative District	
States: Arkansas Florida Illinois Indiana Iowa Kansas Missouri Nebraska Select All Clear Level: U.S. Senate U.S. House State Senate State Senate State House Select All Clear Query Options Query Member Address	Districts AR - U.S. Senator John Boozman AR - U.S. Senator Mark L. Pryor AR - U.S. Representative Rick A. Crawford AR - U.S. Representative Tim Griffin AR - U.S. Representative Steve Womack AR - U.S. Representative Mike Ross SD - U.S. Senator Tim Johnson SD - U.S. Senator John Thune SD - U.S. Representative Kristi Lynn Noem	Select All Clear
Sort Last Name	ОК	

Reports

Reports are similar to queries except that they are already formatted for easier printing and they can be exported into Excel, PDF, or Word files. To close the query window for reports, click on the [X] button in the upper right-hand corner of the screen.

Four types of reports are available with Project Zip Code:

The District Report

This Report allows you to select specific state, district and sort options. This report can be customized for multiple districts.

Clicking on the [Create Report] button will produce a preview of the report that can then be printed, discarded, or exported into a different format.

Project Zip Code - Query By Geograp	hic Area
States: Arkansas Florida Illinois Indiana Iowa Kansas Missouri Nebraska Select All Clear Levels: U.S. Senate U.S. House State Senate State House	Districts Select All Clear
Select All Clear	Create Report

The County Report

County Reports allow you to select specific state, county and sort options. This report can be customized for multiple counties.

The Official Strength Report

An Official Strength Report generates information about your credit union that is specific to each legislator. By choosing the state from the left column, the correct legislator information for that state is shown. This can be printed or discarded.

The District Strength Report

This report shows a similar screen to the Official Strength Report. However, the information is provided by district rather than by an elected official's name. This report is particularly handy if an elected official changes during the course of a term.

😔 District Strength Report				
of 2? ▶ ▶	🗢 🛞 🚱 🌐 🛄 🔍 🔍 🔹 100% 🔹 🛛 Fir	nd Next		
Strength Report Arkanass Arkanass Flonda Illinois Indiana Aranas Aranas Mova Masouri Nebraska North Dakota Okitaberga	Project Zip Code - District St Date: 01/02/2013 Arkansas U.S. Senate	rength Anal	ysis	
	U.S. Senate	60		
	Total Members:	60		
	U.S. House			
	District Name	Members		
	Congressional District 1	4		
	Congressional District 2	36		
	Congressional District 3	2		
	Congressional District 4	18		
	Total Members:	60		
	State Senate			
	District Name	Members		
	Senate District 3	2		
	Senate District 5	1		
	Senate District 10	1		
	Senate District 11	2		
	Senate District 15	1		
	Senate District 18	2		
	Senate District 23	15		
	Senate District 27	1		
	Sanata District 31	25		

As mentioned previously, the District Strength Report can be exported into Excel, PDF, and Word. Just click on the floppy disk icon to begin the export.

District Strength Report	
🗐 🖣 1 of 2? 🕨 🕅	Find Next
Strength Report Arkansas Arkansas Florida F	Project PDF Date: 01/02/2 Word - District Strength Analysis
	Arkansas
ter Missoun ter Nebraska ter Nebraska	U.S. Senate
• Oklahoma	District Name Members
⊞. South Dakota	U.S. Senate 60
	Total Members: 60
	U.S. House
	District Name Members
	Congressional District 1 4
	Congressional District 2 36
	Congressional District 3 2
	Congressional District 4 18
	Total Members: 60
	State Senate

When exporting, you will be asked to save the file to a location of your choice.

E District Strength Report				1.				x
≪	H + 🛞 🕲 🖨	🔲 💷 🔍 - 100%	•	Find Next				
Strength Report Arkansas Florida Florida Florida Florida Florida Florida	Project Z Date: 01/02/201	ip Code - Dis 13	strict Strer	ngth Analysis				×
€ · Iowa € · Kansas	Save As							x
	00 - 1 + PZ	C13.0 >			▼ 4 ₇	Search PZC 13.0		٩
i North Dakota i Oklahoma	Organize 🔻 New	w folder					••• •	0
tei-South Uakota	★ Favorites Desktop Downloads Downloads Recent Places Documents Music Pictures Videos Videos Computer Local Disk (C:)	Cueries		Strength Report 1-2-2013				
	File name:	Strength Report						•
	Save as type:	PDF (*.pdf)						•
	Aide Folders					Save	Cancel	

Once you have clicked [Save] to finalize the export from PZC, you will need to go to the location where you saved the file to open it. Below is an example of the PDF District Strength Report.

🏂 Stre	rength Report 1-2-2013.pdf - Adobe Acrobat						
File	Edit View Window Help				×		
1	🔁 Create 🗸 🛛 🚰 🚍 🖾 🖗 🕫 🕼 🕼 🚺 🛃						
	1 / 46 I 🖑 - + 70.7%	-	Tools	Comment	Share		
	Project Zip Code - District St Date: 01/02/2013 Arkansas U.S. Senate	rength Analysis			^ 		
1.4	District Name	Members					
-y-	U.S. Senate	60					
	Total Members	: 60					
	U.S. House						
	District Name	Members					
	Congressional District 1	4					
	Congressional District 2	36					
	Congressional District 3	2					
	Congressional District 4	18					
	l otal Members	60					
	State Senate						
	District Name	Members					
	Senate District 3	2					
	Senate District 5	1					
	Senate District 10	1					
	Senate District 11	2					
	Senate District 15	1					
	Senate District 18	2					
	Senate District 23	15					
	Senate District 27	1					
	Senate District 31	25					
	Senate District 34	- 58					
		··					
					-		

In the Word export of the District Strength Report you will be able to make changes to the text and change the appearance of the report from the standard PZC version.

🔟 🗔 🕫 o 🔮 这 🖑 🕼 🔻	Strength Report 1-2-2013 [Compatibility Mode] - Microsoft Word	Table Tools
File Home Insert Pag	ge Layout References Mailings Review View Developer Add-Ins	Acrobat Design Layout 🛆 ?
Arial - 10	▲ A* Aar 奥 田 · 田 · 田 · 田 · 田 · 田 · 田 · 田 · 田 · 田	
Paste _ B Z U ~ abe X.		Spaci Heading 1 Heading 2 Title Change
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L	······································	# · · · 5 · · · · · · · 6 · · · · · · · 7 · · · ·
	Project Zip Code - District Strength Anal	vsis
		,
:	Date: 01/02/2013	
-	Arkansas	
:	U.S. Senate	
	o.o. ochate	
·	District Name Members	
	Total Members: 6	n
i 🗄		
	U.S. House	
	District Name	
	Congressional District 1	a de la companya de la
	Congressional District 2 31	6
4	Congressional District 3	2
:	Congressional District 4	8
-	Total Members: 6	D
	State Senate	
μn -		
:	District Name Members	
-	Senate District 5	1
	Senate District 10	1
	Senate District 11	2
-	Senate District 15	1
Page: 1 of 19 Words: 6,133		

In the Excel version of the report, you can click on the hyperlinked state names to access the data from that state, or click on the different sheets below.



Utilities

The Utilities tab allows you to export your membership data for corrections as well as upload new or updated data to the Project Zip Code website. Additionally, you can personalize options and change user names and passwords through this tab.

Export Data

The export function allows you to pull data from the application for use in other programs. This option can be selected by clicking on the [Export DATA] button under the Utilities tab.



Step 1: Select Output Data

Choose the information you want to export from the Select Output Data tab. There are several exports available to users listed below. These include: 'Legislator Table', a complete list of state and federal lawmakers including contact information for each lawmaker and the number of credit union members in each lawmakers' district. 'Members Totals by District' identifies member counts by each state and federal district, whereas 'Member Totals by Official' identifies member counts by each state and federal lawmaker. 'Member Totals by Zip5' and 'Member Totals by Zip9' identifies member counts by each state member counts by each five digit and nine digit zip code respectively. The 'State Totals' export identifies member counts by state. Finally, 'Unmatched Members' creates a list of all unmatched records from the upload.

ſ	📲 Export Data	
🗱 Pro File	Step 1 - Select Output Data Select Export Data	×
ſ	Step 2 - Create Output File Create File Create File	
Ex	Step 3 - Export Data Output Progress	
Read	Export Cancel	

In the example below, a user selects 'Unmatched Members'. This allows the user to identify and fix any incorrect data from the unmatched records. Once the data is corrected, the user may re-run the program by clicking on the [Import Member Data] button above and then using the updated membership file.

	eg Export Data	
Pro Pro	Step 1 - Select Output Data	x
File	Unmatched Members -	
F	Step 2 - Create Output File Create File	
Ex	Step 3 - Export Data Output Progress	
Read	Export Cancel	

Step 2: Create Output File

Click on the [Create File] button. Select the type of file you wish to create using the "Save as Type" pull down menu at the bottom of the form. When you have selected the type of file, choose a file name and click on the [Save] button. The program provides you with the option to produce the data in a number of common formats for use in database and word processing programs.

해 Pro File Unmatched Memb	ct Output Data	x		
📴 Save As				×
O → PZC 13.0 →		- 4	Search PZC 13.0	Q
Organize 🔻 New folder				••• • 🕡
Favorites Desktop Downloads Recent Places Documents Music Dicturer Dicturer Control	码 Legislator / Leport 函 PZC File	Report 1-2-2013		
File name: Unmatched Members 1	-2-2013			•
Save as type: CSV Comma delimited (CSV Comma delimited (Text (*.txt) Excel (*.xls)	*.csv) *.csv)			•
Hide Folders			Save	Cancel

Step 3 - Export Data

Once you have completed Steps 1 & 2 in exporting your data, click on the [Export] button.

	en Export Data	
Pro Pro	Step 1 - Select Output Data	×
File	Unmatched Members 🗸	
e	Step 2 - Create Output File	
	C:\Users\kprather\Desktop\PZC 13.0\Unmatcher Create File	
Ex	Step 3 - Export Data	
	Output Progress	
Read		
	Export Cancel	
and the second		



When the export is complete the [OK] button will be highlighted. Click on the [OK] button. The data will then be available in the file and format you saved it under.

Set Options

This screen allows you to manually set up the paths that the program uses to access the matching data.

Project Zip Code - Options	
Client Database Connectionstring: Driver={Microsoft Excel Driver (*.xls, *.xlsx, *.xlsm, *.xlsb)};Dbq=C:\Users\kprather\Desktop\PZC 13.0\Credit Union Membership.xlsx;DefaultDir=CREDIT UNION	Field Mappings:
Client Membership Table Name: Sheet1\$	
Local Output Table Name:	
Data Mapped = True Dataset Generated = True	Application Lock Application Locked = False
Project Zip Code Startup URL: http://www.pzconline.com/	
	Apply

Connect to PZC

This option connects you with the Project Zip Code website. You can also edit the contact and supporting information for the user and password that you have supplied to Project Zip Code.



Import Member Data

This option starts the process of matching data to legislative districts and also replaces the district count data that you have previously uploaded to the Project Zip Code website.

File Queries	Reports Ut	citation -		
		tilities	Help	
Queries		Re	ports	Utilities
Export DATA	Set Option	IS	Connect to PZC	Update Membership Information

This screen will appear after selecting "Import Member Data." Click [Yes] if you wish to upload newer data in Project Zip Code.



After clicking [Yes], simply follow the steps in the PZC User Manual to update your credit union member count in Project Zip Code.