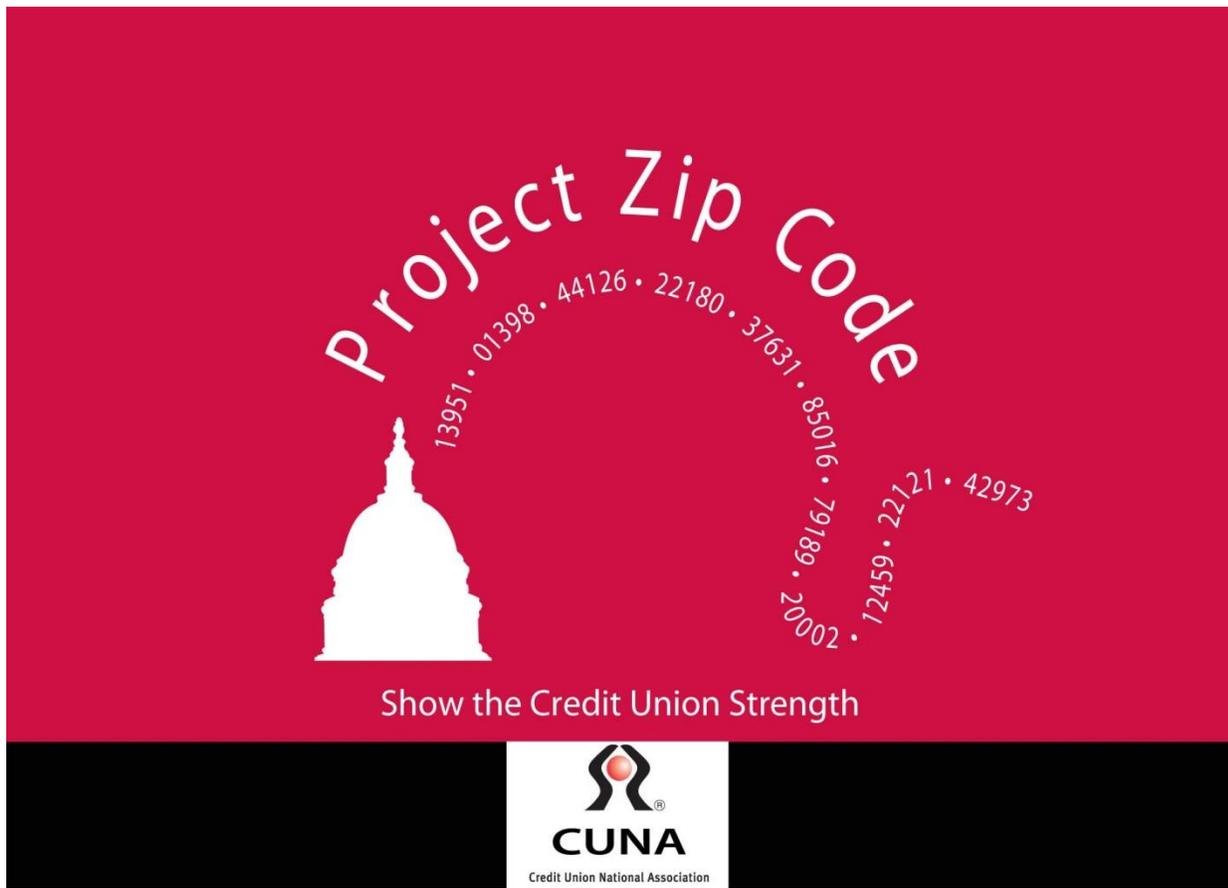


# Project Zip Code 14.0

## Queries and Reports



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## 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.

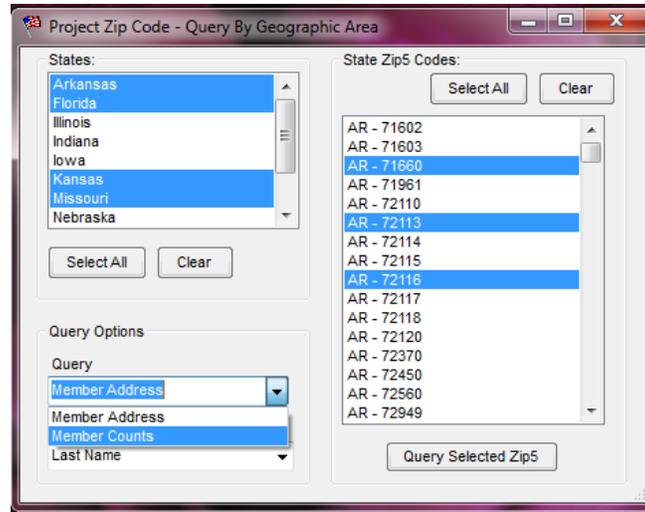


## Queries

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

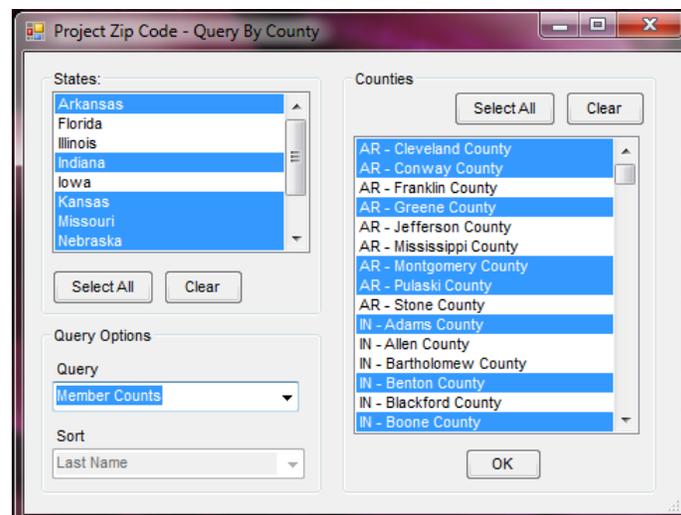
Clicking on the geographic area icon produces the following window. By selecting a state, the number of zip codes within that state present in the database will appear. You can search multiple states and zip codes within one query and choose how the data is displayed.



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.

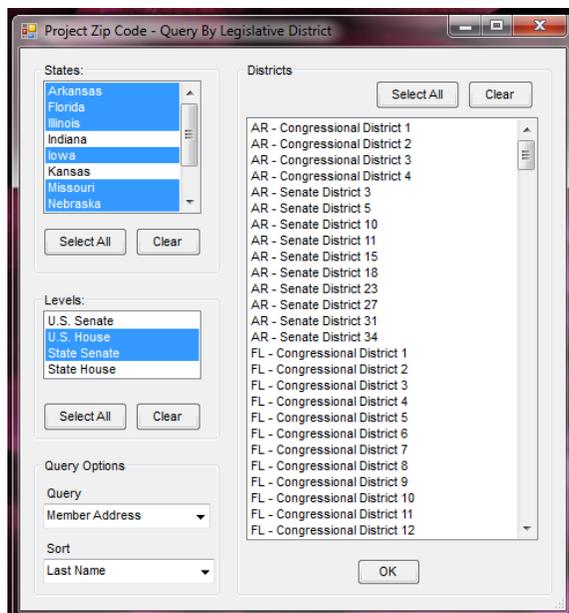
### Searching By County

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.



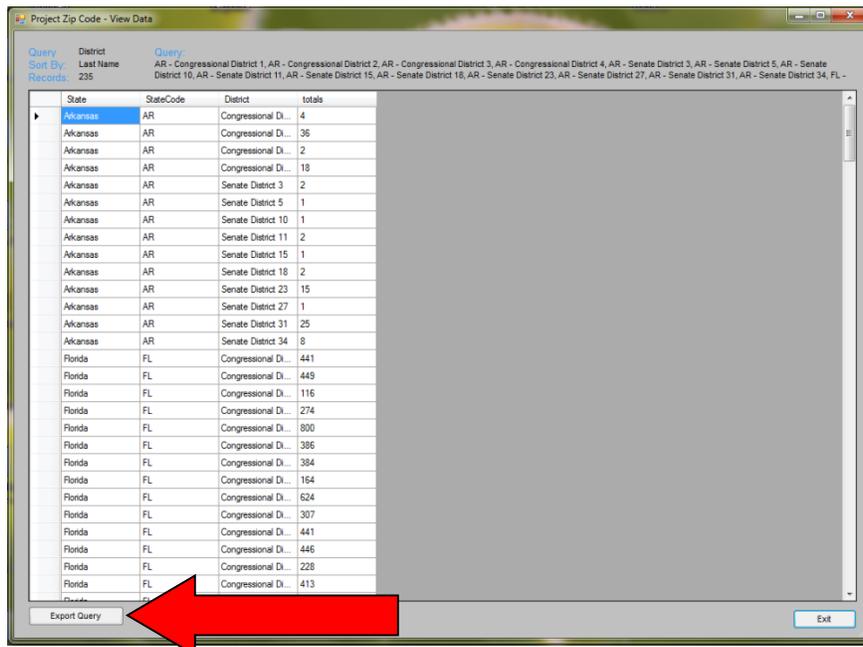
## Searching By Legislative District

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.



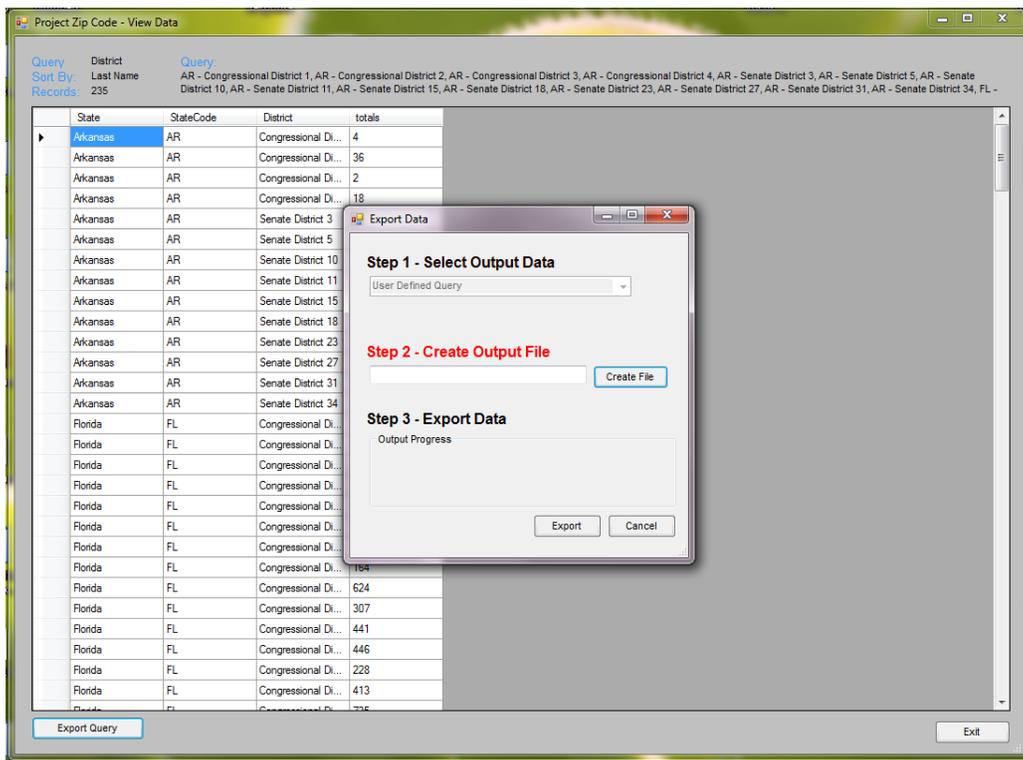
Click on the [OK] button when all the selections meet your requirements.

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

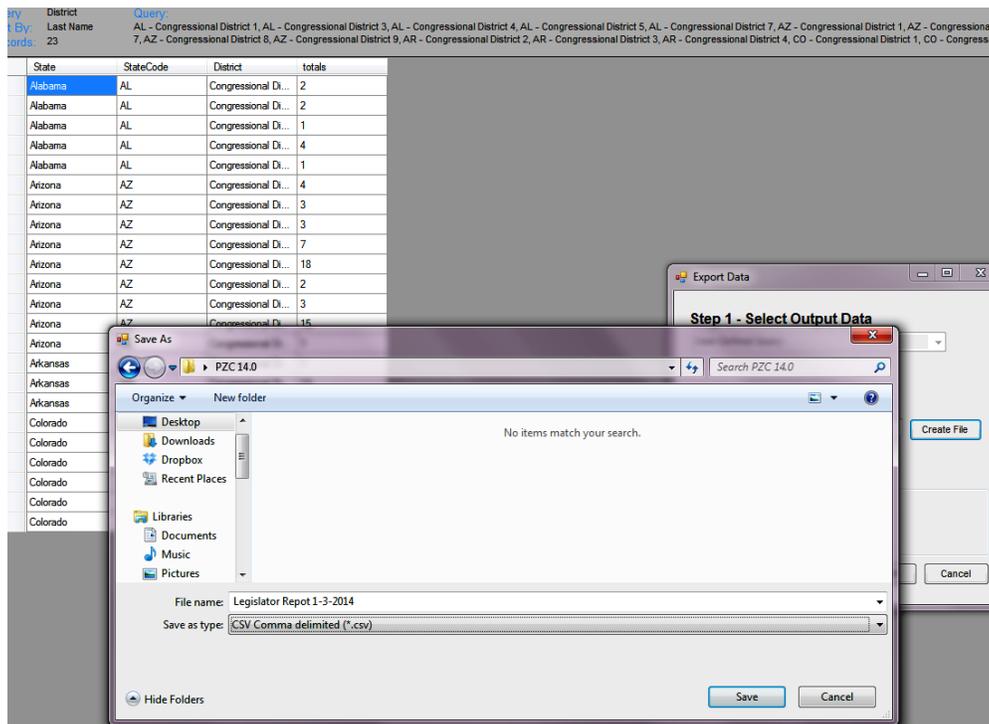


| State    | StateCode | District            | totals |
|----------|-----------|---------------------|--------|
| Arkansas | AR        | Congressional Di... | 4      |
| Arkansas | AR        | Congressional Di... | 36     |
| Arkansas | AR        | Congressional Di... | 2      |
| Arkansas | AR        | 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    |

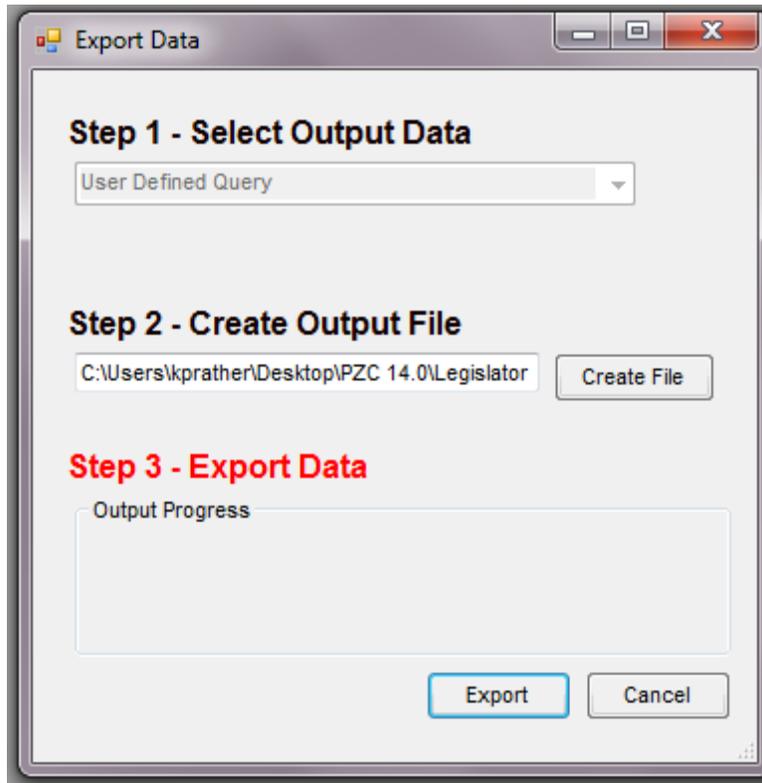
From here, or from any of the Queries you choose to create, you can export this information to a CSV or other program of your choice. Simply click on the [Export Query] button (indicated by the red arrow).



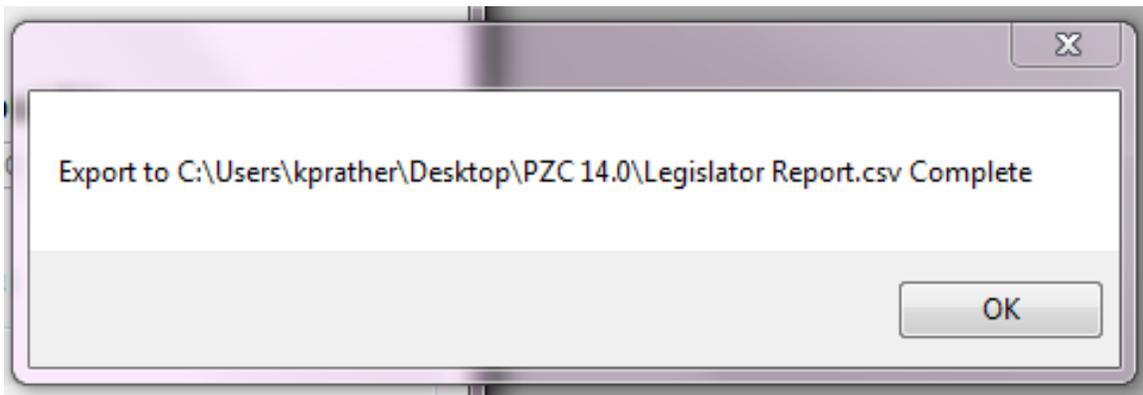
This Screen will then appear and ask you where you would like to save the file and what you would like to save the file as. Click on [Create File] or in the white text box.



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.)



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



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.

Query: District  
Sort By: Last Name  
Records: 16

Query: AL - Congressional District 1, AL - Congressional District 3, AL - Congressional District 4, AL - Congressional District 5, AL - Congressional District 3, CO - Congressional District 4, CO - Congressional District 5, CO - Congressional District 6, DE - Congressional District 1

| State    | StateCode | District            | totals |
|----------|-----------|---------------------|--------|
| Alabama  | AL        | Congressional Di... | 2      |
| Alabama  | AL        | Congressional Di... | 2      |
| Alabama  | AL        | Congressional Di... | 1      |
| Alabama  | AL        | Congressional Di... | 4      |
| Alabama  | AL        | Congressional Di... | 1      |
| Alaska   | AK        | Congressional Di... | 4      |
| Arkansas | AR        | Congressional Di... | 1      |
| Arkansas | AR        | Congressional Di... | 13     |
| Arkansas | AR        | Congressional Di... | 1      |
| Colorado | CO        | Congressional Di... | 3      |
| Colorado | CO        | Congressional Di... | 5      |
| Colorado | CO        | Congressional Di... | 2      |
| Colorado | CO        | Congressional Di... | 7      |
| Colorado | CO        | Congressional Di... | 2      |
| Colorado | CO        | Congressional Di... | 6      |
| Delaware | DE        | Congressional Di... | 1      |

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

**Complete**

Export Close

## 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 Legislative District

States:

- Arkansas
- Florida
- Illinois
- Indiana
- Iowa
- Kansas
- Missouri
- Nebraska

Select All Clear

Level:

- U.S. Senate
- U.S. House
- State Senate
- State House

Select All Clear

Query Options

Query  
Member Address

Sort  
Last Name

Districts

Select All Clear

- 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

OK

## Reports

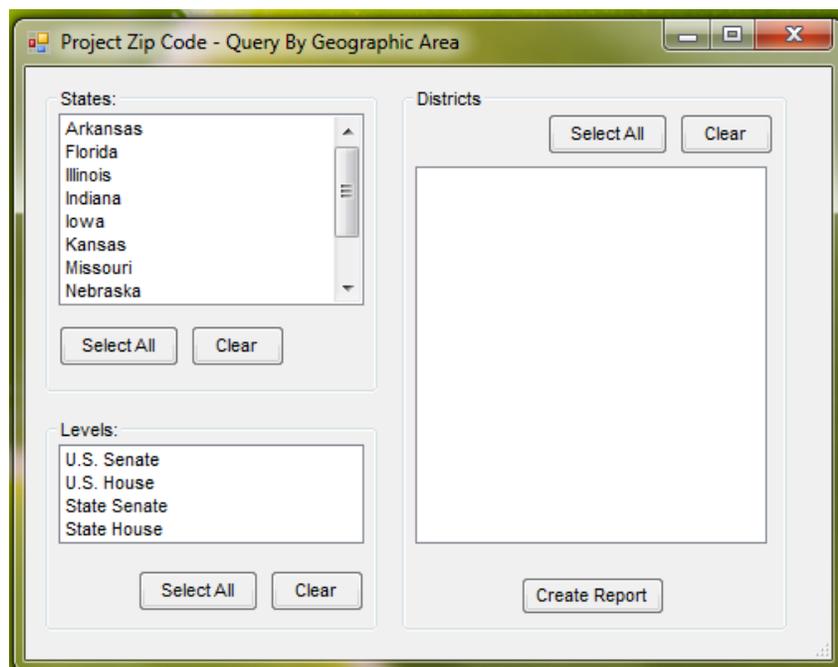
Reports are similar to queries except that they are already formatted for easier printing and they can be exported into Excel, PDF, or Word files. To close the query window for reports, click on the [X] button in the upper right-hand corner of the screen.

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.



### The County Report

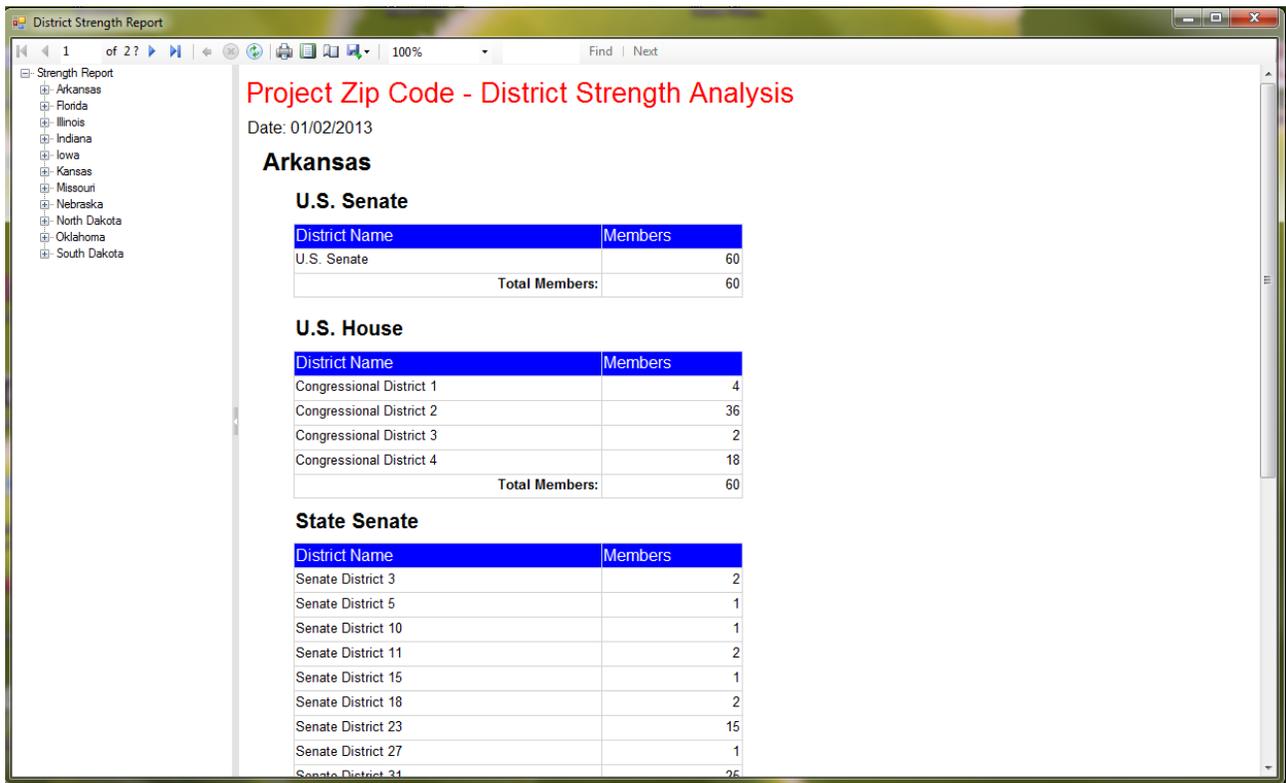
County Reports allow you to select specific state, county and sort options. This report can be customized for multiple counties.

### 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.



The screenshot shows a web browser window titled "District Strength Report". The main content area displays "Project Zip Code - District Strength Analysis" for the date 01/02/2013, specifically for the state of Arkansas. The report is organized into three sections: U.S. Senate, U.S. House, and State Senate. Each section contains a table with "District Name" and "Members".

| U.S. Senate           |           |
|-----------------------|-----------|
| District Name         | Members   |
| U.S. Senate           | 60        |
| <b>Total Members:</b> | <b>60</b> |

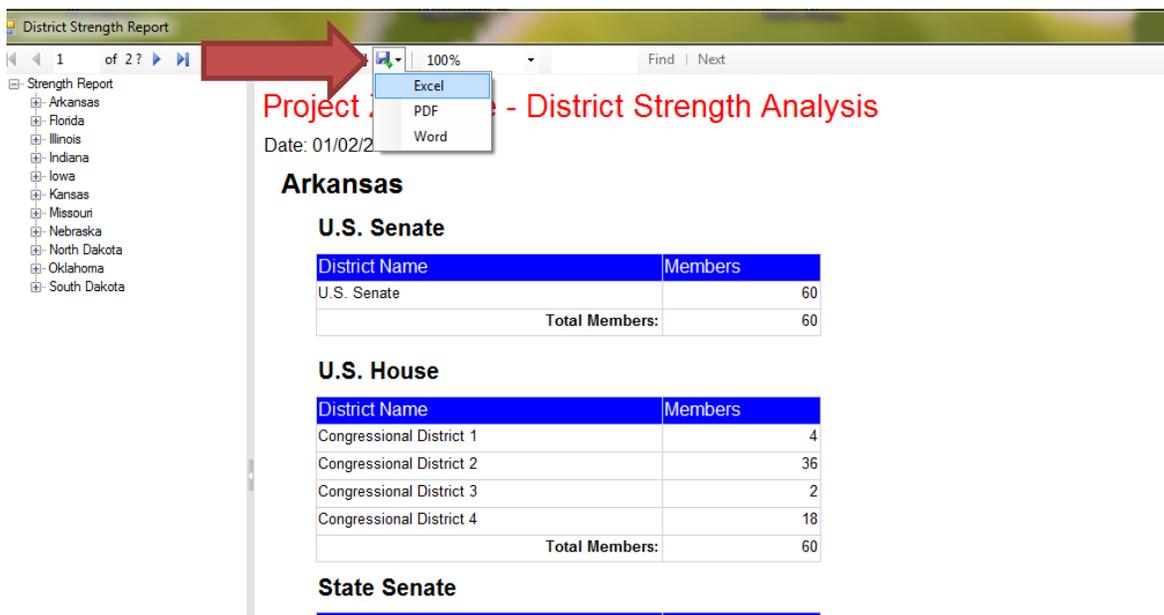
  

| U.S. House               |           |
|--------------------------|-----------|
| District Name            | Members   |
| Congressional District 1 | 4         |
| Congressional District 2 | 36        |
| Congressional District 3 | 2         |
| Congressional District 4 | 18        |
| <b>Total Members:</b>    | <b>60</b> |

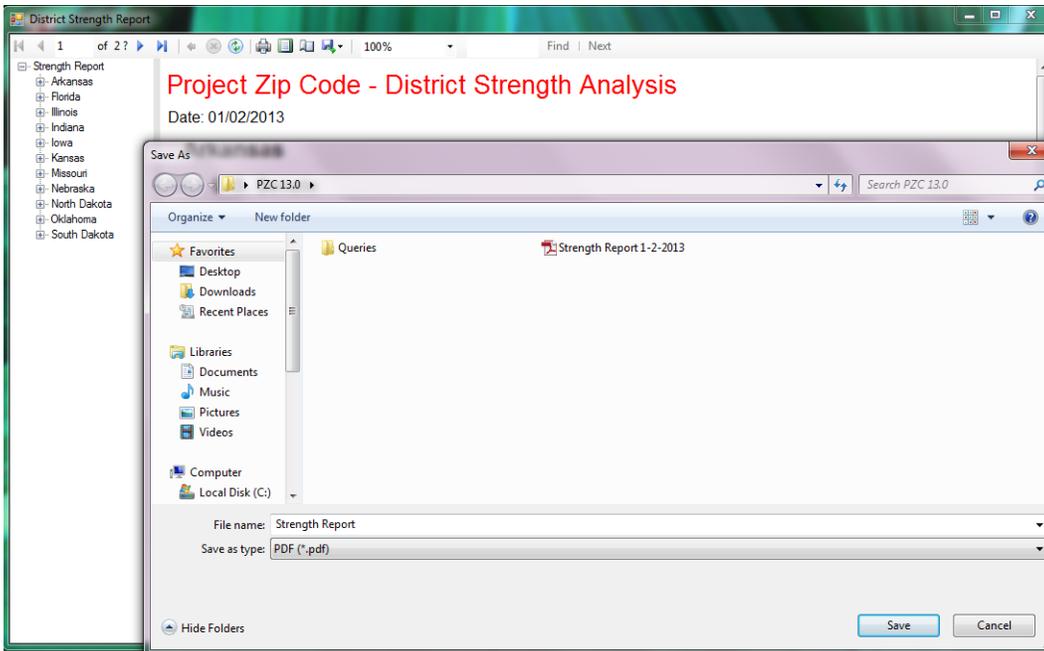
| State Senate       |         |
|--------------------|---------|
| District Name      | Members |
| Senate District 3  | 2       |
| Senate District 5  | 1       |
| Senate District 10 | 1       |
| Senate District 11 | 2       |
| Senate District 15 | 1       |
| Senate District 18 | 2       |
| Senate District 23 | 15      |
| Senate District 27 | 1       |
| Senate District 31 | 25      |

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.

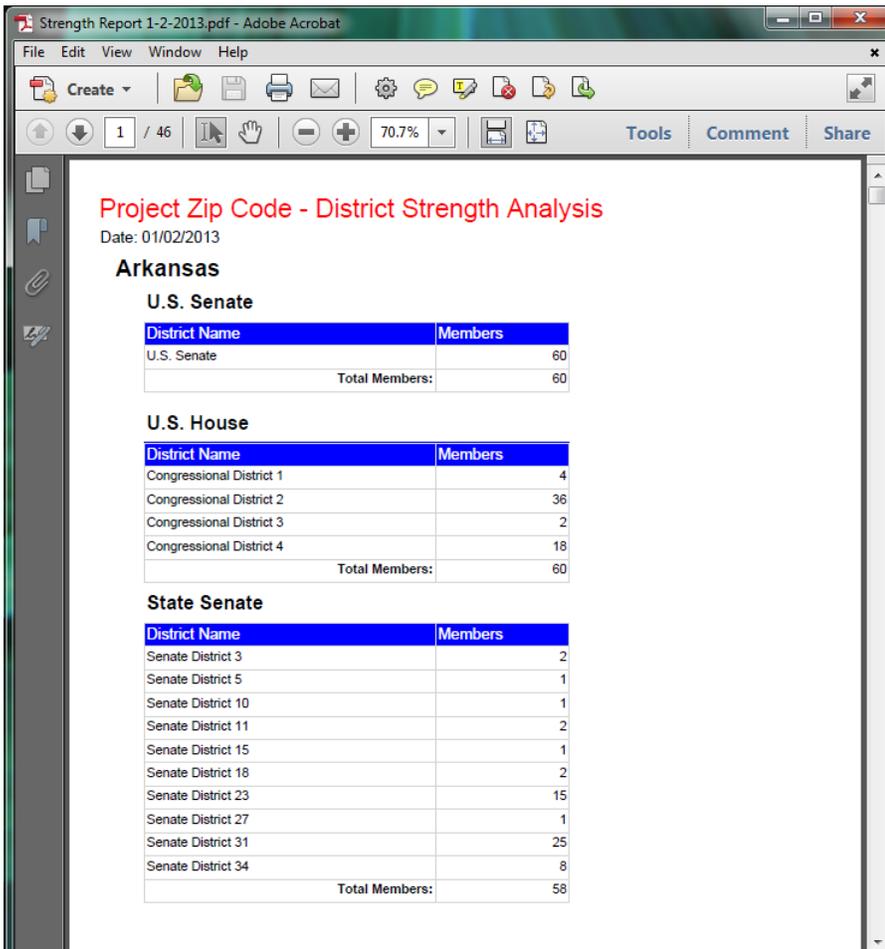


This screenshot is similar to the one above but shows the export options. A red arrow points to the floppy disk icon in the browser's toolbar, which has opened a dropdown menu with three options: "Excel", "PDF", and "Word".

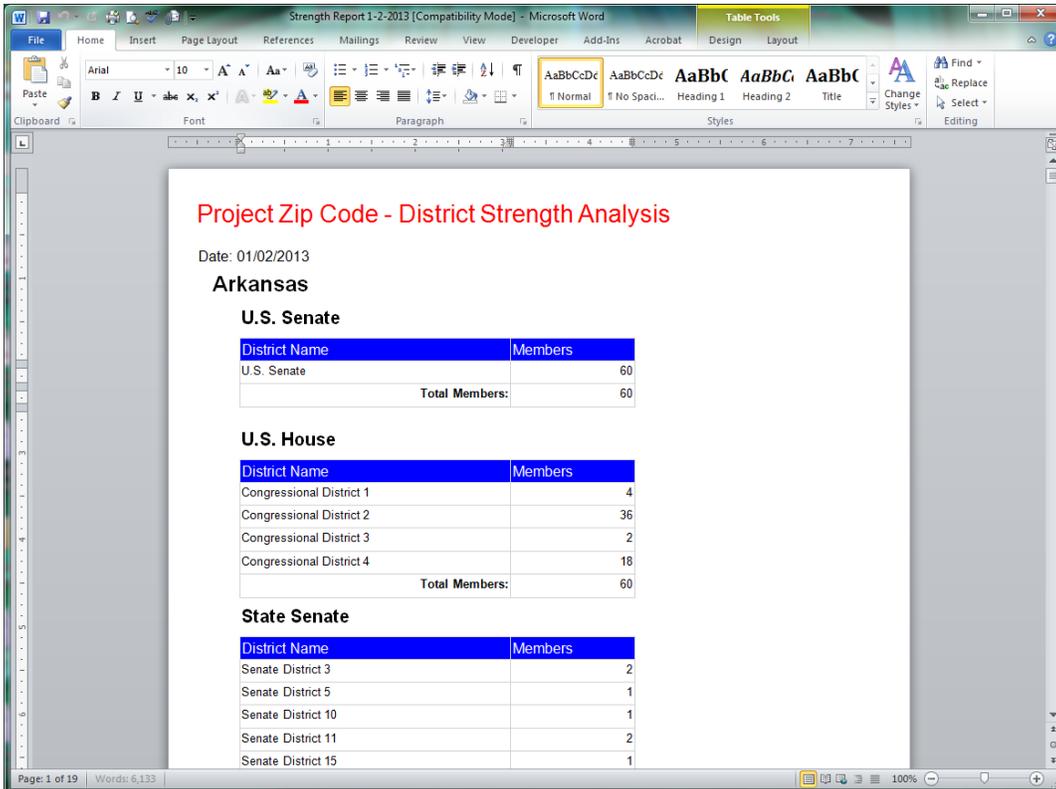
When exporting, you will be asked to save the file to a location of your choice.



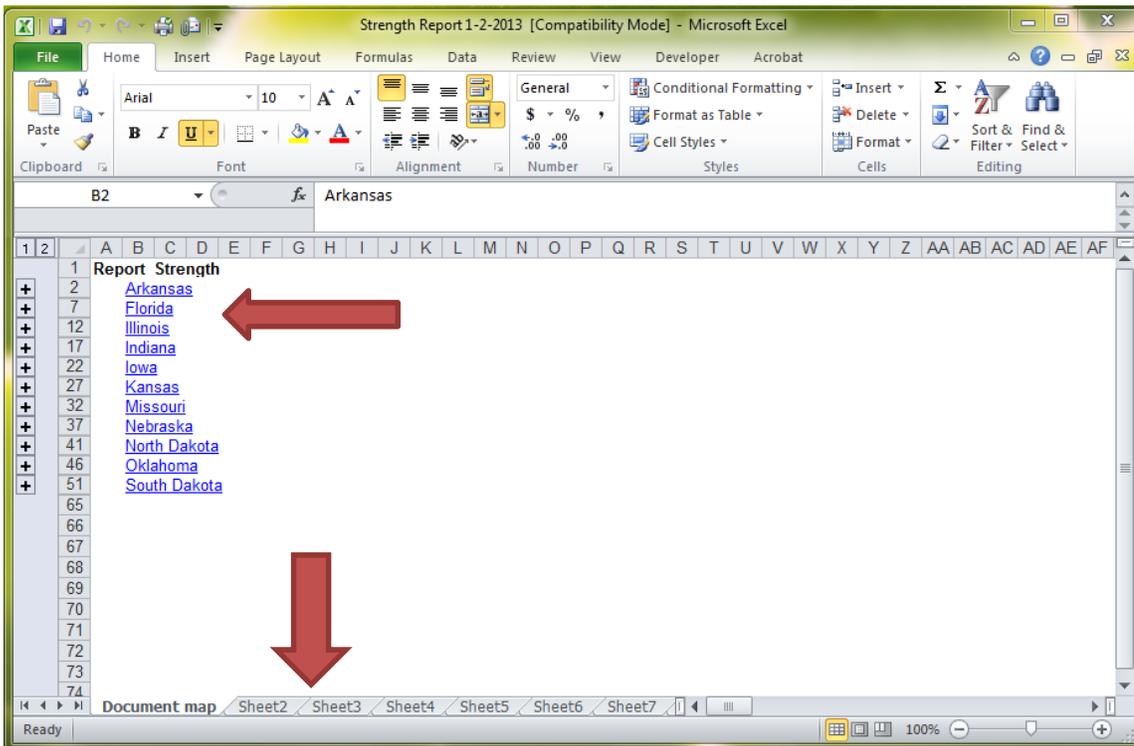
Once you have clicked [Save] to finalize the export from PZC, you will need to go to the location where you saved the file to open it. Below is an example of the PDF District Strength Report.



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.



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.

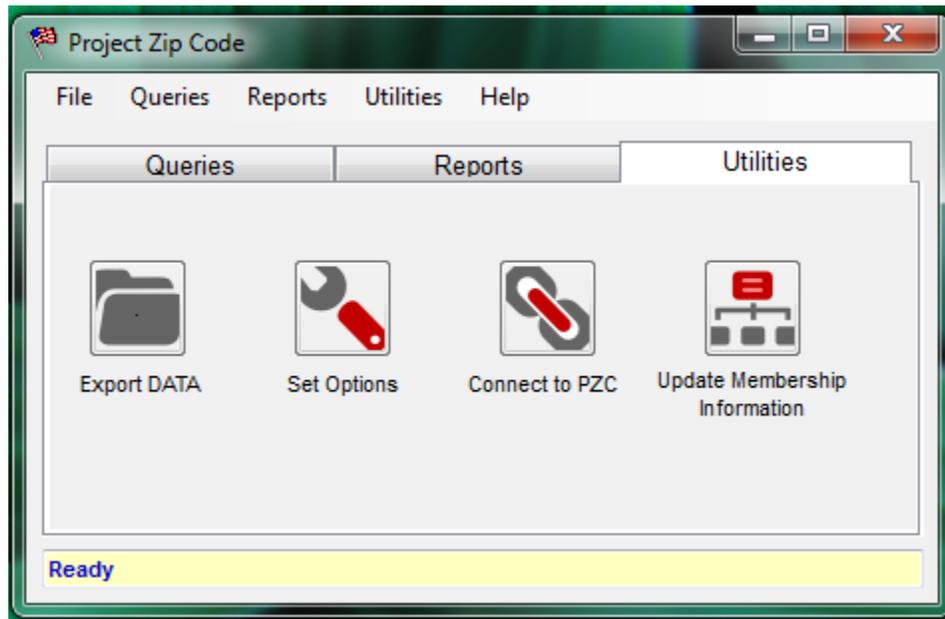


## Utilities

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.

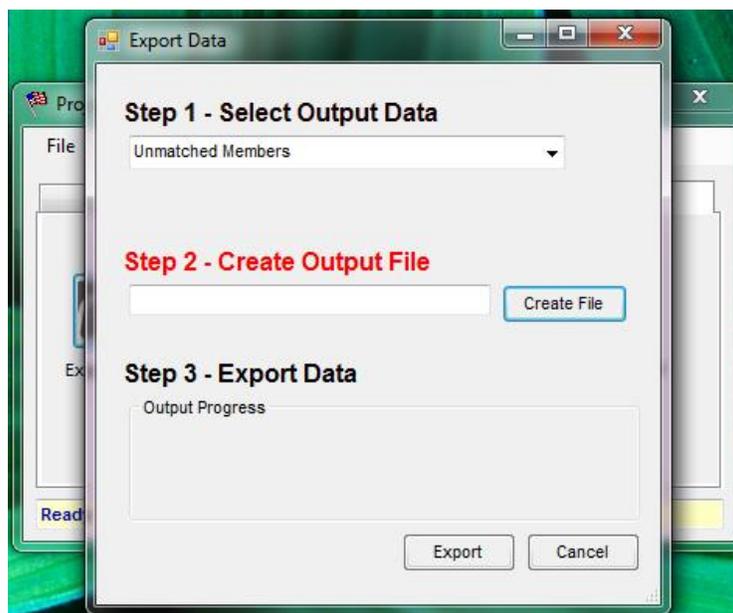


## Step 1: Select Output Data

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 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.

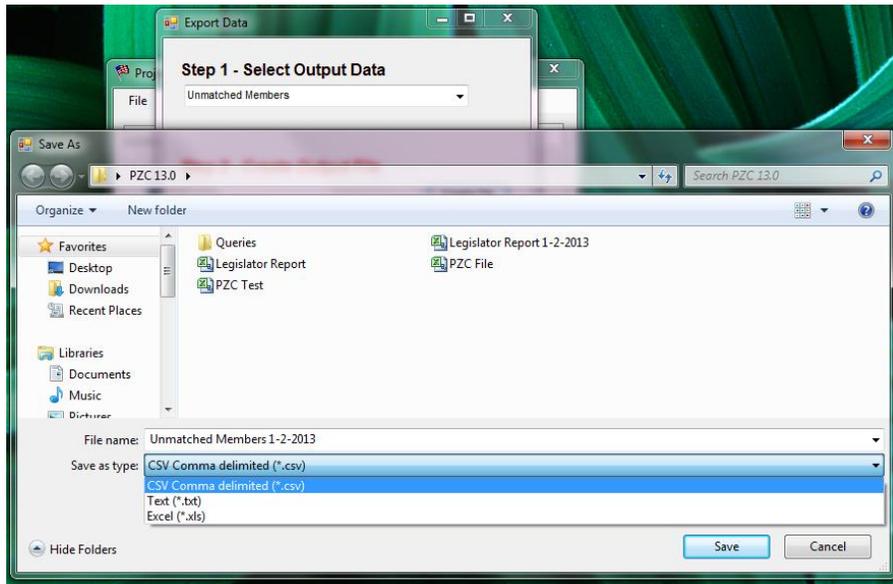


In the example below, a user selects 'Unmatched Members'. This allows the user to identify and fix any incorrect data from the unmatched records. Once the data is corrected, the user may re-run the program by clicking on the [Import Member Data] button above and then using the updated membership file.



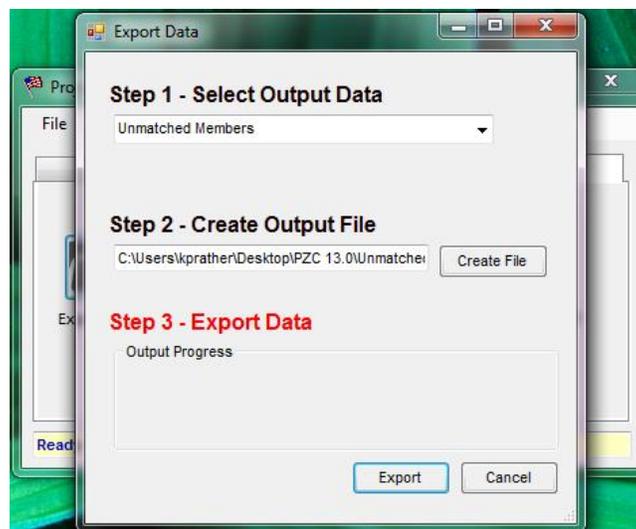
## Step 2: Create Output File

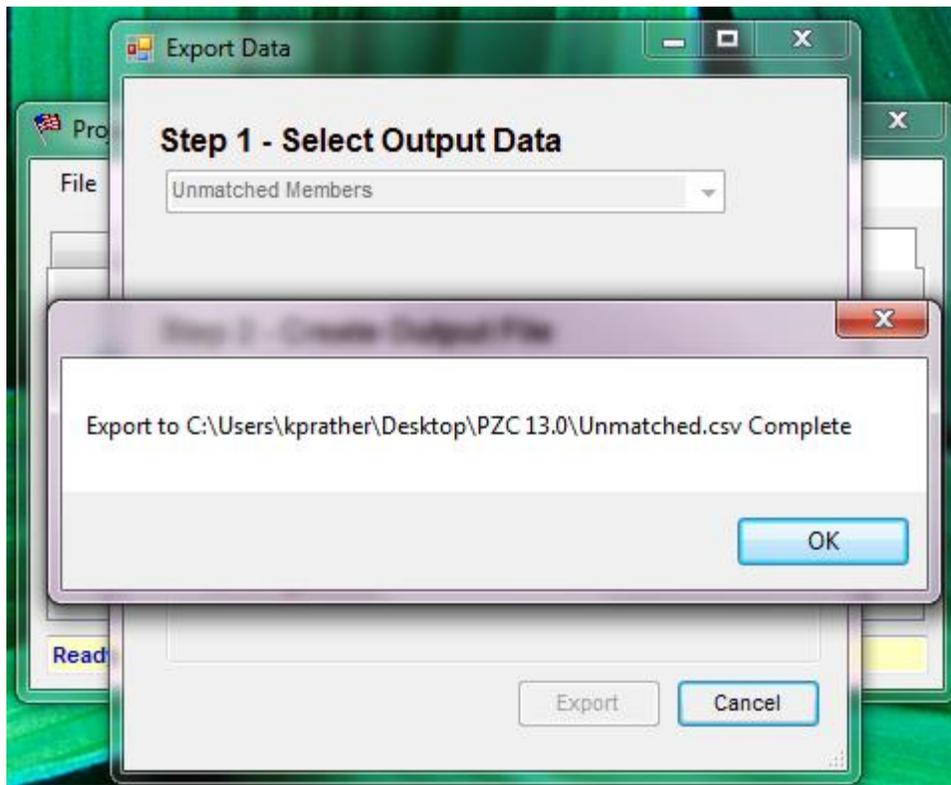
Click on the [Create File] button. Select the type of file you wish to create using the “Save as Type” pull down menu at the bottom of the form. When you have selected the type of file, choose a file name and click on the [Save] button. The program provides you with the option to produce the data in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



## Step 3 – Export Data

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

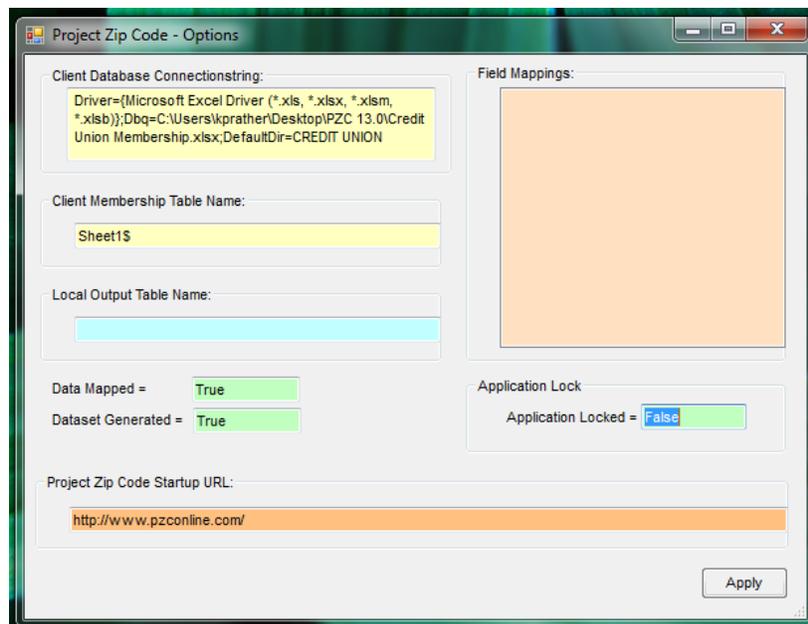




When the export is complete the [OK] button will be highlighted. Click on the [OK] button. The data will then be available in the file and format you saved it under.

### Set Options

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



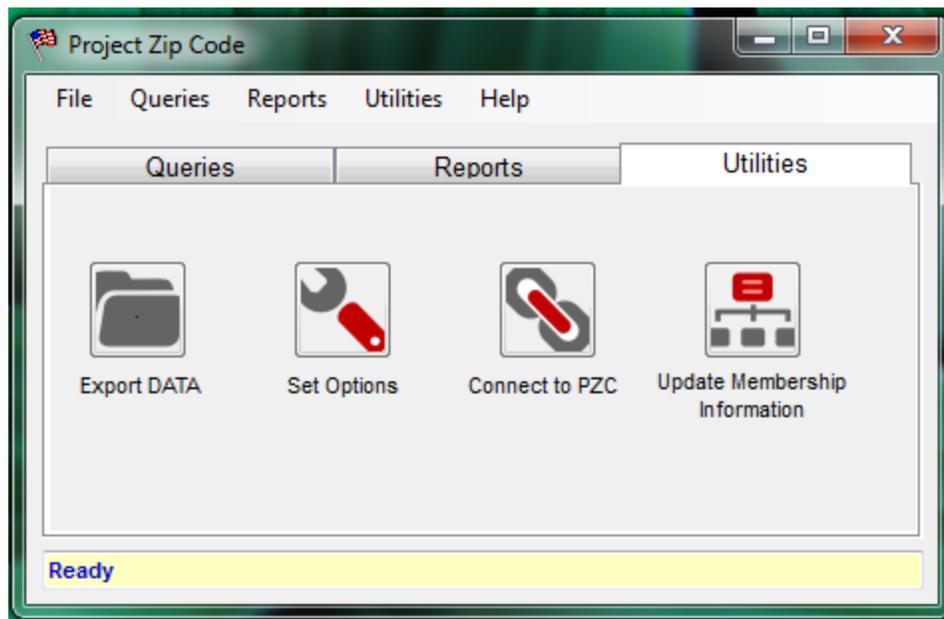
## Connect to PZC

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.

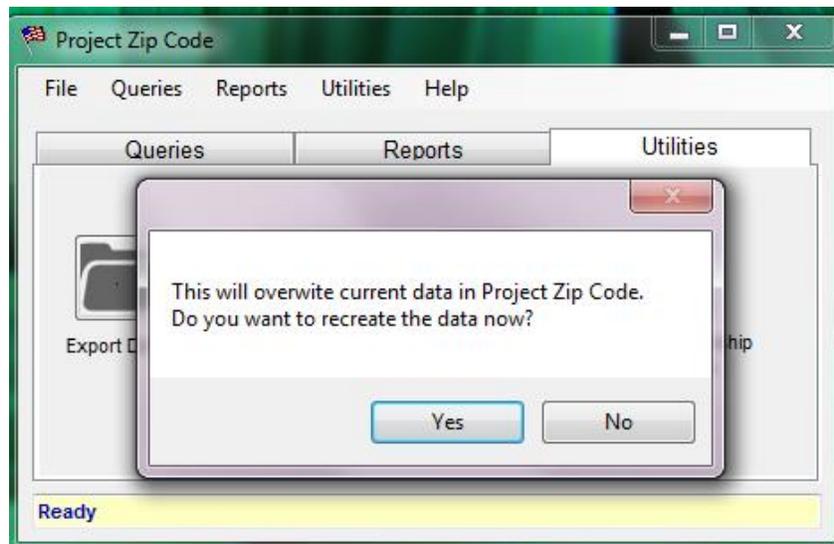


## Import Member Data

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.



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.