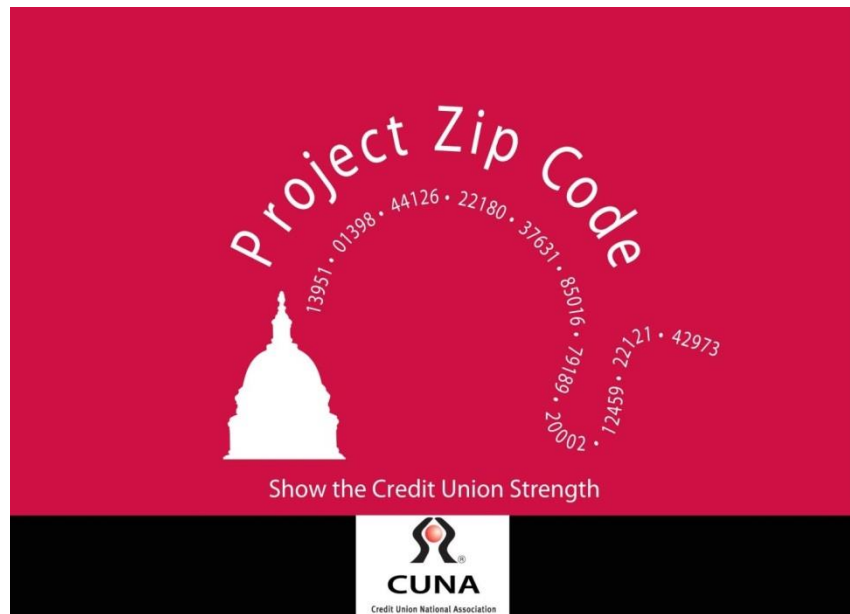


PROJECT ZIP CODE

Download, Install, Run & Update Instructions
- Quick Reference Instructions
2020



Project Zip Code Download, Install, Run & Update

Quick Reference Instructions

First time running PZC: Start at "A"
Updating PZC: Start at "F"

A. Before installing and running PZC:

1. Export membership data to CSV, Access or Excel (CSV works best). Each of the following should be in separate labeled columns:

Street Address	City	State	Zip Code
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2. Please make sure that the column headers are in the first row of the file you are uploading. Also, please make sure the street address, City, State, and Zip code are each in their own column. Remove ALL sort functionality from the cells themselves. The column headers should be text only.
3. Save the file to a convenient location where you can find it. Remember or write down the file name and directory path.

B. Download & Install Software

1. Go to <http://www.pzconline.com/install> and select "Download PZC".
2. Click either [Save file] or [run] (depends on browser).
3. If you get a warning "this program might harm your computer" click "Run Anyway"
4. When PZC setup wizard starts, click [next]
5. PZC will default save to your C: drive. Click [browse] to save elsewhere.
6. Click [next]
7. Confirm Install [next]
8. Installation Complete. Click [close] to automatically start PZC so you can upload data. (note: If you want to upload later, uncheck the "Launch Project Zip Code" box. Double click the American Flag icon to begin upload of data).
9. An American flag PZC icon will appear on your desktop.

C. Matching Data to Districts

If you are running a newer version of Excel and encounter compatibility issues, please save the file in an older version of Excel. Or, save the file as a CSV.

1. Review user agreement and click [continue].
2. **Select data base type** (format selected during data export in "A" above, i.e. Excel, CSV, Access).
3. Locate the data base file name (as saved in "A" above). Click/Highlight file name and click [open]
4. Confirm database name and path appear in the {database name} box. Click [continue].
5. **Select your membership table*** (may not apply to all instances). Click to highlight and select. Confirm table name appears in the {table name} box. click [continue]
6. **Data Mapping.** Click [auto find fields] at upper right corner or use the pull down menu in the required fields to map the appropriate field. Only required fields will be transferred to the PZC secure server. After mapping the required fields, click [continue]
7. PZC is counting the number of records and creating a preliminary dataset. This may take 1-2 minutes.
8. You will be notified how many records were matched (total may not equal your total membership).
9. Click [ok]. **YOU ARE NOT DONE. Now you need to UPLOAD the data for processing.**

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D. Upload Data to PZC

1. Log in or register with your PZC email and password (you must be connected to the internet). If you forgot log in information, click [forgot password] or just register again [new registration]. Also register the credit union. When all data correct, click [continue].
2. Click [update membership information] to initialize the connection to PZC secure server.
3. Click [yes] to confirm upload data for your credit union.
4. Enter a working email address so you can be notified when encryption is complete and you can download your totals. Click [upload].
5. Upload successful. Click [ok]. (note: Only encrypted member address data is sent to be matched. Only information remaining in the PZC database is the total COUNTS per legislative districts.)

You will receive an email from PZC asking you to retrieve the encrypted data. If you do not want to use your data for internal queries or reports, you are done! If you want to use the data, continue.

E. Downloading Data to your Computer

1. Double click the American Flag Icon and login to PZC.
2. Click [login]
3. Login
4. Click [download results]
5. Download successful [ok]
6. You can now use the PZC program to run queries and reports.

F. Updating Data - (every 6-12 months or after a major membership change)

1. Follow steps in (A) above.
2. Double click the American Flag Icon and login to PZC.
3. Click the "Utilities" tab and click [Update Membership Information]
4. Follow steps in (C-E) above.

Thank you!