

Centrus[®] Desktop

Quick Start

Version 6.07.00.N

Centrus Desktop correctly parses, cleanses, standardizes, geocodes, spatially codes, and demographically codes your data *in a single pass*. You can also include your own data by using attributes, such as population counts, demographic characteristics, or other information specific to a region or location.

This document accompanies Centrus Desktop and provides information on the following topics:

- [Key Features](#)
- [Modular Design](#)
- [Installing and Configuring Centrus Desktop](#)
- [Using the Menus and Toolbar](#)
- [Setting the Processing Options](#)
- [Processing Records](#)
- [Using Quick Find](#)
- [Using Map Viewer](#)

For in-depth information on using Centrus Desktop, see the *Centrus Desktop User Guide*. If you are unable to resolve a problem, Pitney Bowes Technical Support Representatives can help guide you to a solution. You may contact a support representative via the web, email, or phone:

- Create a case in our [Online Case Management System](#)
- Send an email to software.support@pb.com
- Call our toll-free number, +1 800.367.6950.

Pitney Bowes

4750 Walnut Street, Suite 200
Boulder, CO 80301

© 2019 Pitney Bowes Software Inc.

All rights reserved.

Key Features

Centrus Desktop offers the following main features:

- **Modular approach** – Centrus Desktop uses a flexible modular design that lets you license any or all of the components your organization needs.
- **Easy to configure** – All you need is a single data path to prepare Centrus Desktop for processing. Centrus Desktop automatically sets this path if you follow the installation recommendations.
- **Save map options** – You can save settings for Centrus Desktop to use every time it draws a map.
- **Oracle and SQL Server support** – Centrus Desktop has native Oracle and SQL Server support for reading and writing to tables.
- **Visual data icons** – Centrus Desktop provides icons for output fields to visually distinguish the originating module for the data element.
- **Easy to configure business geographics modules** – An alert appears when you need to complete additional configuration, and includes information on the type of configuration needed.
- **User-friendly menus and navigation** – Centrus Desktop provides easy to navigate menus for accessing tools and information.
- **Log file report** – Centrus Desktop provides the ability to record processing statistics and data file information to a log file report.
- **Data Viewer** – Using Data Viewer you can validate the correct interpretation of the information in your input file.
- **Verify option** – Using the Verify option you can confirm the configuration of each module before processing.
- **Import option** – Using the Import option, you can add your own data and attributes, such as population counts, demographic characteristics, or other information specific to a region or location.
- **CASS Certified** – The Centrus Desktop address correction and standardization technology meets USPS Coding Accuracy Support System (CASS) standards.
- **LACSLink Support** – Centrus Desktop includes support for the USPS Locatable Address Conversion System (LACSLink), which provides you with an automated process to correct address lists for areas that have undergone permanent address conversions.
- **DPV Support** – Centrus Desktop includes support for the USPS Delivery Point Validation (DPV) data, which provides the ability to validate the accuracy of address information down to the physical delivery point.

Modular Design

Centrus Desktop uses a modular design that provides you with the flexibility to license any or all of the components your organization needs. You can expand Centrus Desktop by adding one or more of the following modules:

- Address Coding

This module cleanses addresses to the highest level, exceeding the USPS CASS and Canada Post Corporation's (CPC) Software Evaluation and Recognition Program (SERP) standards. As Centrus Desktop corrects addresses, it incorporates a comprehensive address-level geographic coding function specifically designed to spatially enable your data. This process adds key components to each database record including latitude, longitude, Census Tract, and Block Group.

- Demographics Coding

This module appends neighborhood-level demographics to each record, giving you the information you need to understand your best customers and target prospects with similar habits and lifestyles.

- Spatial Coding

This module performs a variety of geospatial analyses that helps organizations locate a specific set of points within a boundary (point-in-polygon), determine distance between two points, estimate distance between two locations, or identify a set of points within a given mileage of a location.

- Geographic Determination

This module provides a confidence level assignment for each spatial comparison, which you can use to determine the likelihood that a given address falls within a targeted area. The technology provides a confidence score to every geographic assignment at all levels: address-level, ZIP+4, ZIP+2, or ZIP Code. This technology can also determine minimum and maximum distances from the input address to a line or point feature or to determine the polygons in which the address falls.

Contact your sales representative for additional information on expanding your Centrus Desktop capabilities.

Installing and Configuring Centrus Desktop

When you install and configure Centrus Desktop you need to:

1. Install the Centrus Desktop software
2. Install the data files
3. Start Centrus Desktop
4. Configure the data path

Step 1 – Installing the Centrus Desktop software

The Centrus Desktop software includes an easy to use installation wizard. You can find detailed installation steps in the *Centrus Desktop Installation Guide*.

Writing log entries

By default, Centrus Desktop is installed to C:\Program Files (x86)\Centrus\Desktop. On Windows Server 2012 and later, there are restrictions writing to the Program Files directory. As a result, customers should write log entries to a file location other than the default install location.

Step 2– Installing the data files

After you install the Centrus Desktop software, you need to install the data files.

Data files required for processing must reside on your system, or your system must have direct access to the installation media. You can find detailed steps for installing the data in the *Centrus Desktop User Guide*. You can find additional information about the data supplied by Pitney Bowes in the *Release Notes for the Centrus Data Product Suite*.

Pitney Bowes recommends that you install all the data files into the single default directory specified during the installation of the data. This eliminates additional data path configuration.

Step 3 – Starting Centrus Desktop

To Start Centrus Desktop:

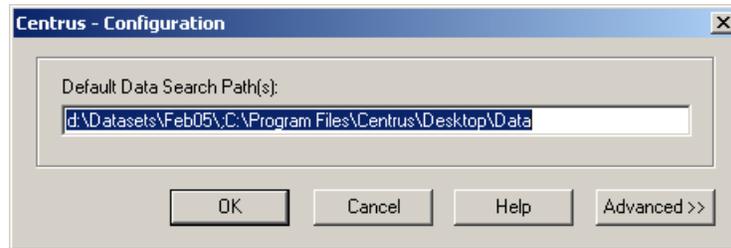
- Select **Programs > Centrus > Centrus Desktop** from the Windows Start menu.

Step 4 – Configuring the data path

If you installed all of your data files in the single default directory specified during the installation of the data, the data paths on the **Advanced Configuration** dialog should update automatically.

To verify or change the data path:

- Select **File > Configuration** from the menu options in the Centrus Desktop application. The following dialog appears:



Tips/Tricks

- You can specify additional directories by separating the directories with a semi-colon (;).
- You can browse to files located in other directories by clicking the **Advanced** button in the Centrus Configuration dialog.

Using the Menus and Toolbar

Centrus Desktop provides easy to navigate menus and toolbars for accessing functionality.

Menus

The following menu options are available at the top of the Centrus Desktop application:

File

- | | |
|-------------------------------|--|
| <i>New Task</i> | Dismisses the current task and opens a new task, which clears the input file, any spatial attribute files, and sets the options and preferences to their default selections. |
| <i>Open Task</i> | Opens a saved task, which includes saved input files, attribute files, and preferences. |
| <i>Save Task/Save Task As</i> | Saves the current input files, attribute files, and processing options. |
| <i>Configuration</i> | Displays a dialog box where you can set the location of the data files. |

Edit

- | | |
|--|---|
| <i>Clear Outputs for...</i> | Clears the outputs for the selected tab. |
| <i>Clear All Outputs</i> | Clears all of the outputs. |
| <i>Clear All Outputs Except....</i> | Clears all of the outputs except for the tab selected. |
| <i>Standardization Defaults/Geocode Defaults</i> | Provides a way to automatically configure output fields. Selecting <i>Existing Fields</i> matches inputs to outputs. Selecting <i>New Fields</i> creates new fields and matches the output to these fields. |

Tools

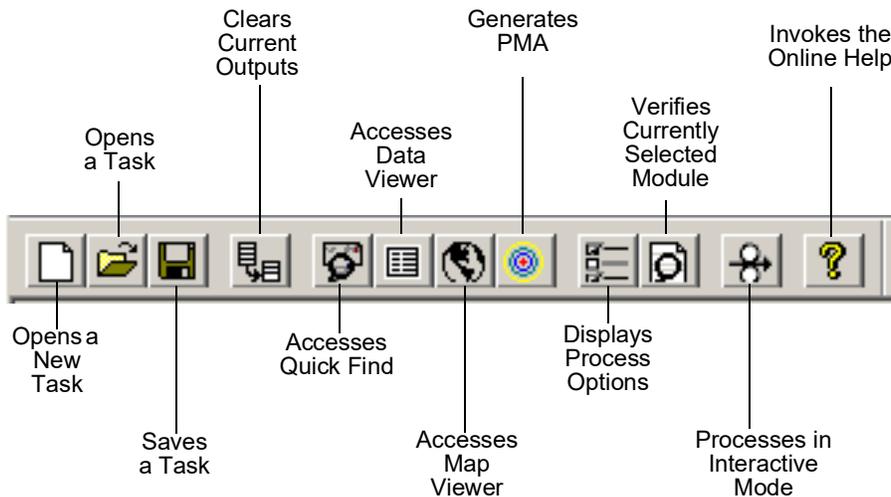
- | | |
|---------------------|---|
| <i>Quick Find</i> | Provides access to information about a single address. |
| <i>Data Viewer</i> | Provides access to view the contents of the input file. |
| <i>Map Viewer</i> | Creates a map based on your input information. |
| <i>Shape Layers</i> | Provides a way to create and export .gsb files and to generate a Primary Market Area (PMA). |

Process

- Options* Displays a dialog where you can configure processing options for each module.
- Verify.../Verify All* Confirms the configuration of the selected module, or all of the modules, before processing.
- Process Task* Interactively processes data records located in the input file, providing a way to view the results for each record.
- Batch Process Task* Processes the data records loaded in the input file in a batch. You must view the output file to see the results.

Help

- Help Topics* Provides an interactive help system for Centrus Desktop.
- About Centrus* Provides Centrus Desktop version and license information.

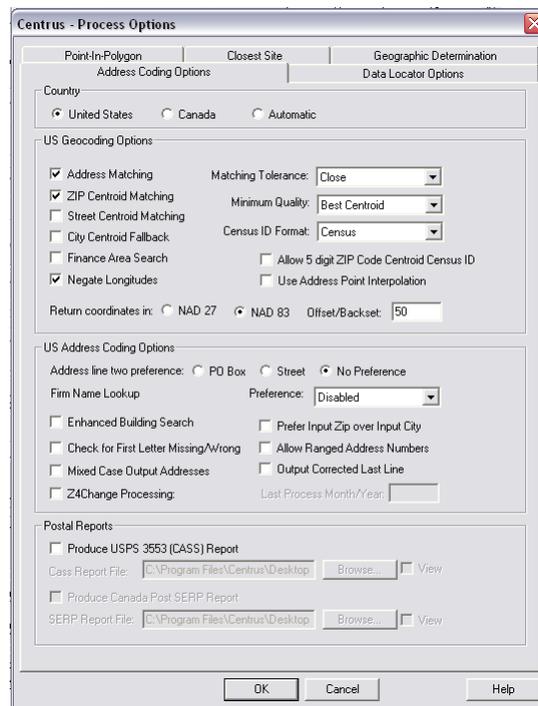
Toolbar

Setting the Processing Options

For each module, you can configure options that control how Centrus Desktop processes records. These options are applicable regardless of the type of processing you select, and affect information available using Quick Find.

To change or review the process options:

1. Select **Process > Options**. The Centrus - Process Options window appears.



2. Select the tab for the module you want to configure.

Tabs available in the Centrus - Process Options dialog contain the following type of information:

- **Address Coding Options**
Determines how Centrus Desktop matches addresses, and the format of the information returned.
- **Data Locator Options**
Contains settings that determine how the Data Locator Module assigns gender information to names, as well as the format of the returned names.
- **Point in Polygon, Closest Site, and Geographic Determination**
Provide the ability to add spatial object files in the Centrus proprietary GSB format and import popular GIS formats.

For detailed information on the tabs and the different tab options, see the *Centrus Desktop User Guide*.

Processing Records

When you process records you must:

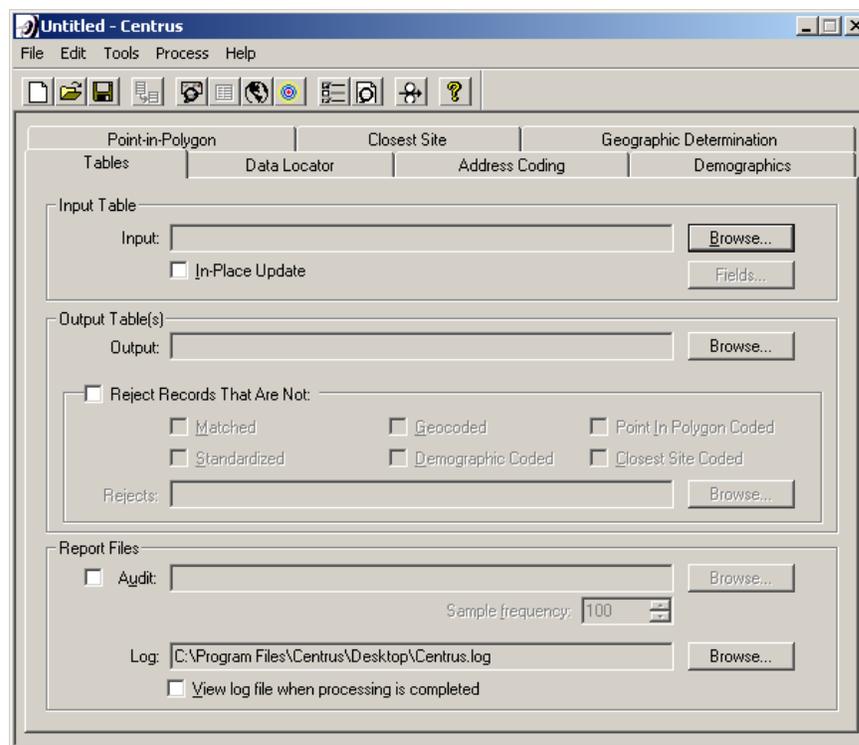
1. Specify the input and output tables
2. Select input and output fields
3. *(Optional)* Verify your processing options
4. *(Optional)* Save the job file
5. Process the records

Step 1 – Specifying input and output tables

Using the Tables tab you can set the input file that contains record information and determine the output file, if desired, for reviewing processed records.

To specify input and output tables:

1. Select the **Tables** tab. The following appears:



2. Click **Browse** in the Input Table section to select an input file containing records.

3. Optionally, set the Output Table options:

Note: If you select the **In-Place Update** checkbox in the Input Options section, you do not need to identify an output table file and location. In-Place Update overwrites the input file with the processed record results. With this method you cannot retrieve your records in their original format unless you saved the file in an alternate location. In-Place Update is not available for the following data table types: SQL, Excel, ODBC, and Oracle.

- Click **Browse** in the Output Table(s) section to select or create an output table.
- Optionally, select the **Reject Records that are Not** check box and identify the rejection criteria.

<i>Matched</i>	Cannot find an address match for the record.
<i>Geocoded</i>	Cannot find latitude and longitude.
<i>Point In Polygon Coded</i>	Point does not fall within any available polygon.
<i>Standardized</i>	Cannot standardize record to USPS data.
<i>Demographic Coded</i>	Cannot find a demographic code for the record.
<i>Closest Site</i>	Record does not fall within range specified on the Closest Site tab.

4. Optionally, set an audit file for a snapshot of the processing performed by Centrus Desktop:

- Select the **Audit** checkbox.
- Browse to the location where you want to save the audit file.

5. Verify or change the Log file location.

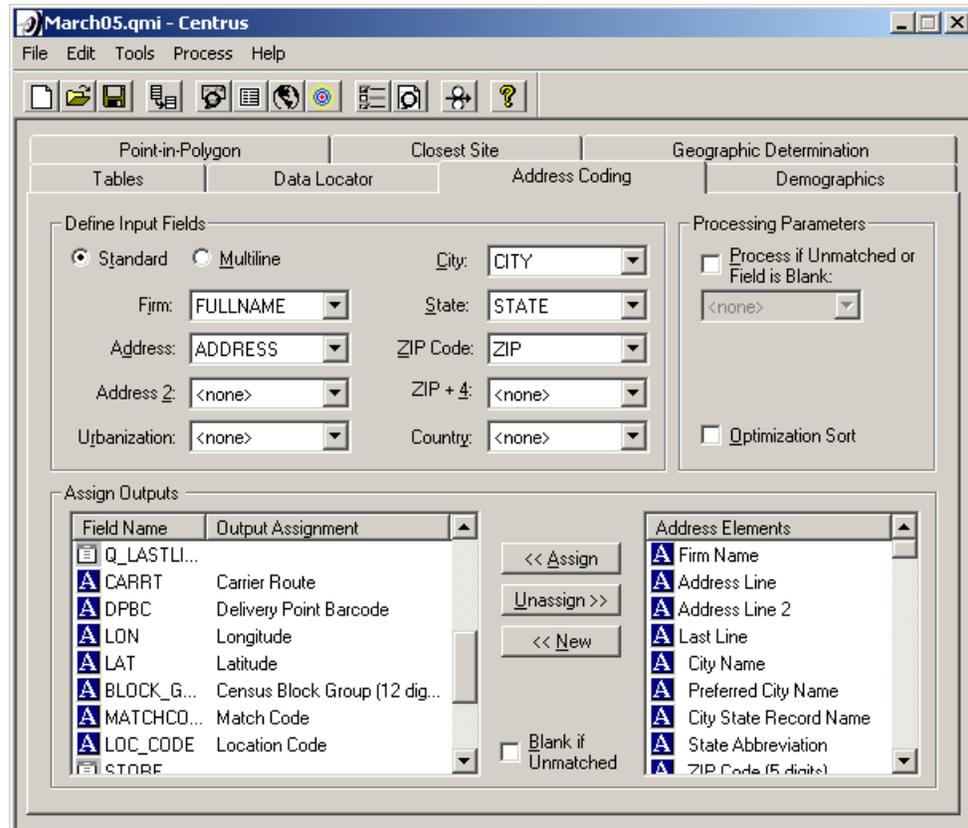
Step 2 – Selecting input and output fields

In the individual module tabs, you assign input fields from your input file to preset fields in Centrus Desktop. You also assign address elements to a corresponding output field. You assign input and output fields using the same process, regardless of the module.

To select inputs and outputs in any module tab:

1. Select the appropriate tab for the module you want to configure.

The following is an example of a module tab with input and output selections.



2. Match fields in the input file to the Centrus Desktop data element in the Define Input Fields section.

You assign input fields by selecting a field from the drop-down menu. The address elements available for mapping depend on the input file

3. Assign Centrus Desktop output data elements to output file fields in the Assign Outputs section.

You assign output data elements by selecting an element and a corresponding output field name and clicking **Assign**. The output field appears next to the data element.

Assigned elements contain a letter icon indicating from which module you assigned the output field: P (Point-in-Polygon), A (Address Coding), D (Demographics), C (Closest Site), G (Geographic Determination), and L (Data Locator).

If an appropriate output field does not exist (it is not shown in the Field Name list), select the output data element and click **New** to add a new field to the output table. A dialog appears where you enter specifics about the new field.

Tips/Tricks

- You can assign output fields by selecting a field name and double-clicking the output data element you wish to assign to that field, or by dragging and dropping the element next to the field name you wish to assign.
- Double-clicking an element without first selecting a field name creates a new field.
- You can unassign a field name by double-clicking the field name. Double-clicking removes the field from the output list if the field is a new field.

Step 3 – Verifying your processing options

Before you process records, you can verify you have configured Centrus Desktop properly for processing.

To verify the configuration:

- Select **Process > Verify All**.

If you have configured Centrus properly, a message appears indicating Centrus Desktop did not find any errors. If you have not configured Centrus Desktop properly, a message appears indicating what action you need to take to successfully configure Centrus Desktop for processing.

Step 4 – Saving the job file

Once you have specified the input and output information, you can save the job settings for future use. This minimizes setup time and ensures that you process all address information in the same manner.

To save your job settings:

- Select **File > Save Task As** from the File menu.

Tips/Tricks

Saving your task can help Centrus Technical Support answer questions regarding processing.

Step 5 – Processing the records

After selecting input and output files, assigning the input and output fields, and setting the processing options, you are ready to process records.

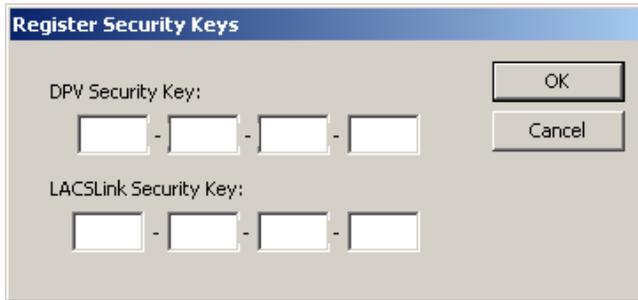
There are two types of processing: batch processing and interactive processing. Batch processing provides you with a way to process all of the records in one quick pass. You then view the results in the output file. With interactive processing, you can view the processing results of each record as Centrus Desktop processes the record. You can still view the results in the output file when processing interactively.

Batch Processing

To process in batch:

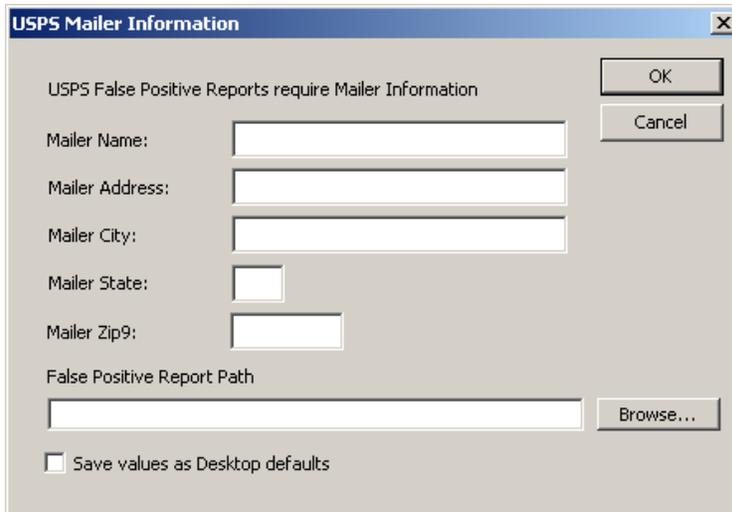
1. Select **Process > Batch Process Task**.
2. Optionally, configure your DPV and LACSLink processing information.

The Register Security Keys window only appears the first time you process records using DPV or LACSLink information.



The Register Security Keys dialog box has a blue title bar with the text "Register Security Keys". It contains two sections for security keys. The first section is labeled "DPV Security Key:" and has four empty text boxes separated by hyphens. The second section is labeled "LACSLink Security Key:" and also has four empty text boxes separated by hyphens. On the right side of the dialog, there are two buttons: "OK" and "Cancel".

The USPS Mailer Information window appears if you have selected address elements that contain DPV or LACSLink information



The USPS Mailer Information dialog box has a blue title bar with the text "USPS Mailer Information" and a close button (X). It contains several fields and buttons. At the top, it says "USPS False Positive Reports require Mailer Information". Below this are five text input fields: "Mailer Name:", "Mailer Address:", "Mailer City:", "Mailer State:", and "Mailer Zip9:". Below these is a "False Positive Report Path" field with a "Browse..." button next to it. At the bottom left, there is a checkbox labeled "Save values as Desktop defaults". On the right side, there are two buttons: "OK" and "Cancel".

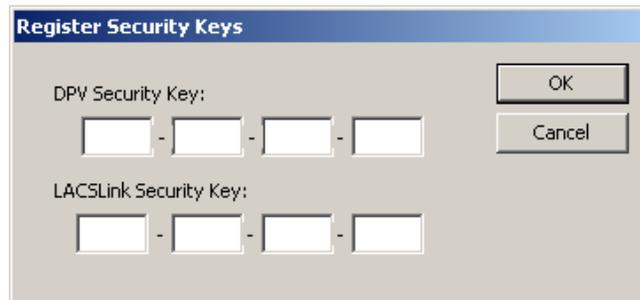
For more information on DPV or LACSLink, see the *Centrus Desktop User Guide*.

Interactive Processing

To process interactively:

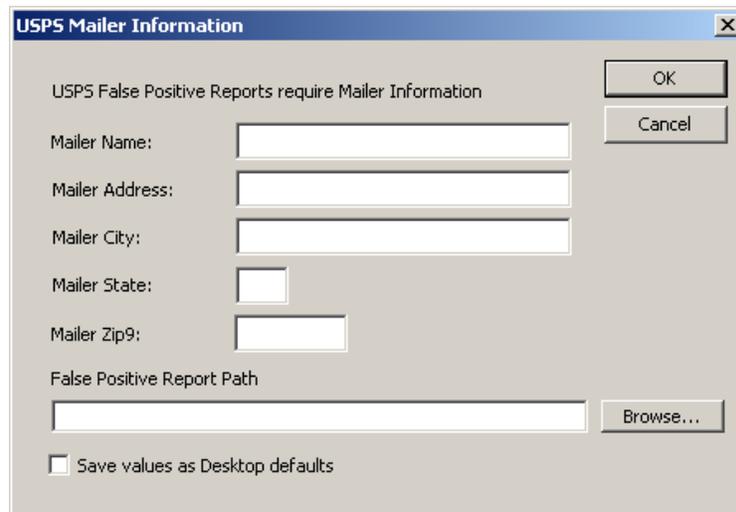
1. Select **Process > Process Task**.
2. Optionally, configure your DPV and LACSLink processing information.

The Register Security Keys window only appears the first time you process records using DPV or LACSLink information.



The Register Security Keys dialog box has a blue title bar with the text "Register Security Keys". It contains two sections for security keys. The first section is labeled "DPV Security Key:" and has four empty text boxes separated by hyphens. The second section is labeled "LACSLink Security Key:" and also has four empty text boxes separated by hyphens. On the right side of the dialog, there are two buttons: "OK" and "Cancel".

The USPS Mailer Information window appears if you have selected address elements that contain DPV or LACSLink information.

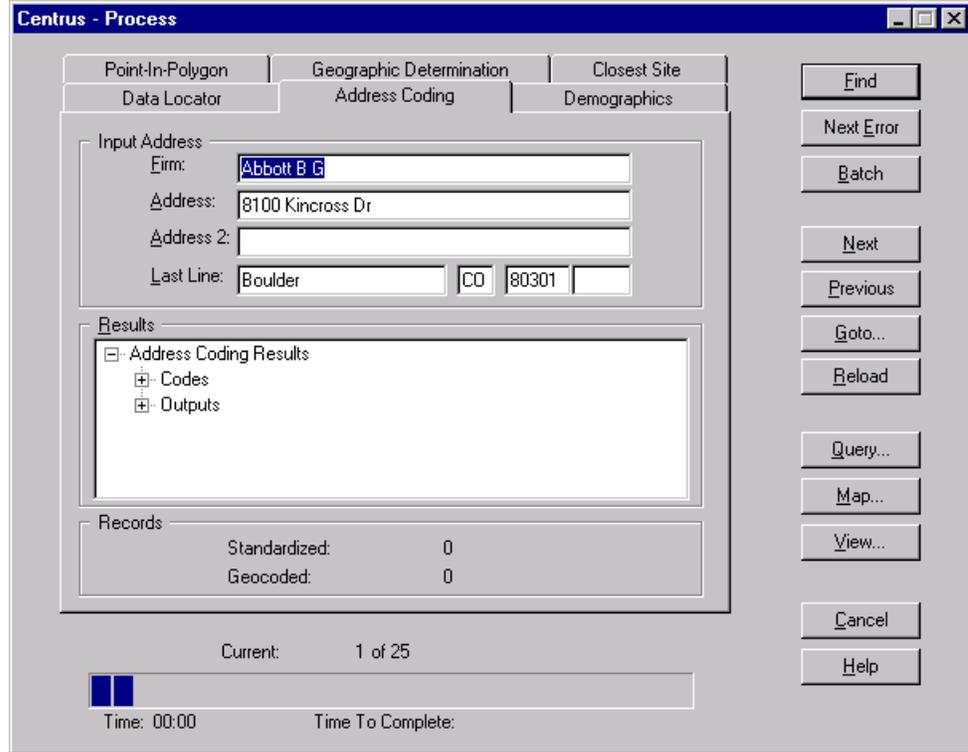


The USPS Mailer Information dialog box has a blue title bar with the text "USPS Mailer Information" and a close button (X). It contains a message: "USPS False Positive Reports require Mailer Information". Below this message are several input fields: "Mailer Name:", "Mailer Address:", "Mailer City:", "Mailer State:" (with a dropdown arrow), and "Mailer Zip9:". There is also a "False Positive Report Path" label followed by a text box and a "Browse..." button. At the bottom, there is a checkbox labeled "Save values as Desktop defaults". On the right side, there are "OK" and "Cancel" buttons.

For more information on DPV or LACSLink, see the *Centrus Desktop User Guide*.

3. Click **OK**.

The first processed record appears. You can expand information in the Results section by clicking the plus sign (+). You can click on individual modules, if you have purchased that functionality, to see additional information.



4. Click **Next** to view additional records.

A message appears when Centrus Desktop finishes processing the records.



5. Click **OK**, to close the message window.
6. Click **Done** to dismiss the processing window.

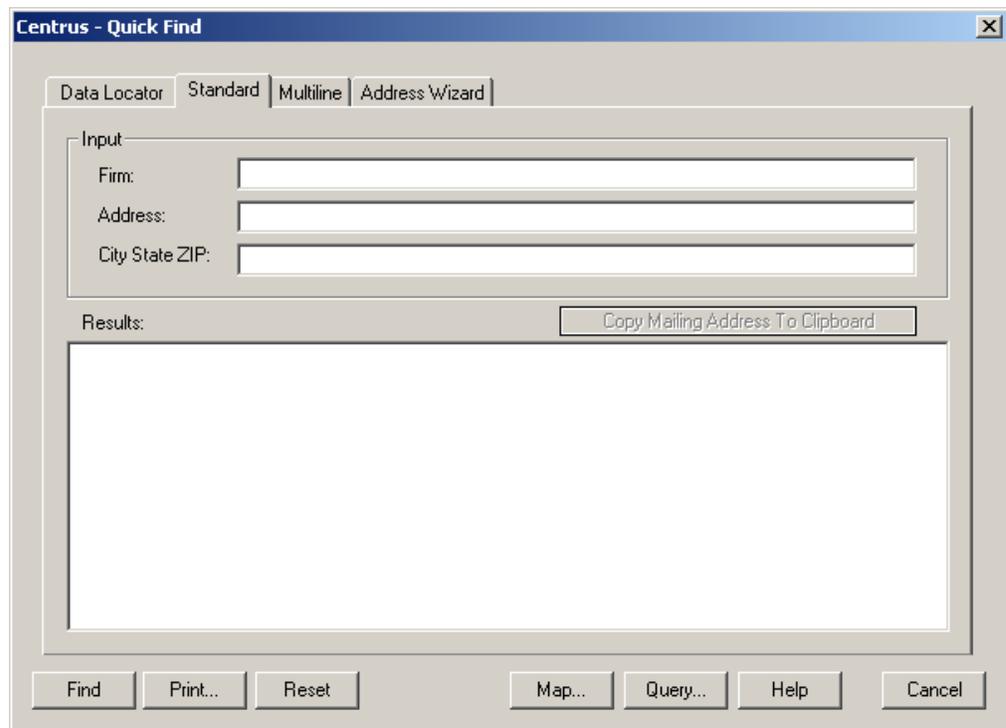
Using Quick Find

Quick Find provides access to a variety of information about a singular address. Quick Find uses the Negate Longitudes, Census ID Content, Census ID Format, and NAD settings specified in the Centrus Process Options dialog box. Quick Find also includes a comprehensive Query function, which provides complete access to the address standardization and geocoding database.

Note: For information on using QuickFind in a mode other than Standard mode, see the *Centrus Desktop User Guide*.

To use Quick Find in Standard Mode:

1. Click the Quick Find button  or select **Tools > Quick Find** to start Quick Find. The Centrus - Quick Find window appears:

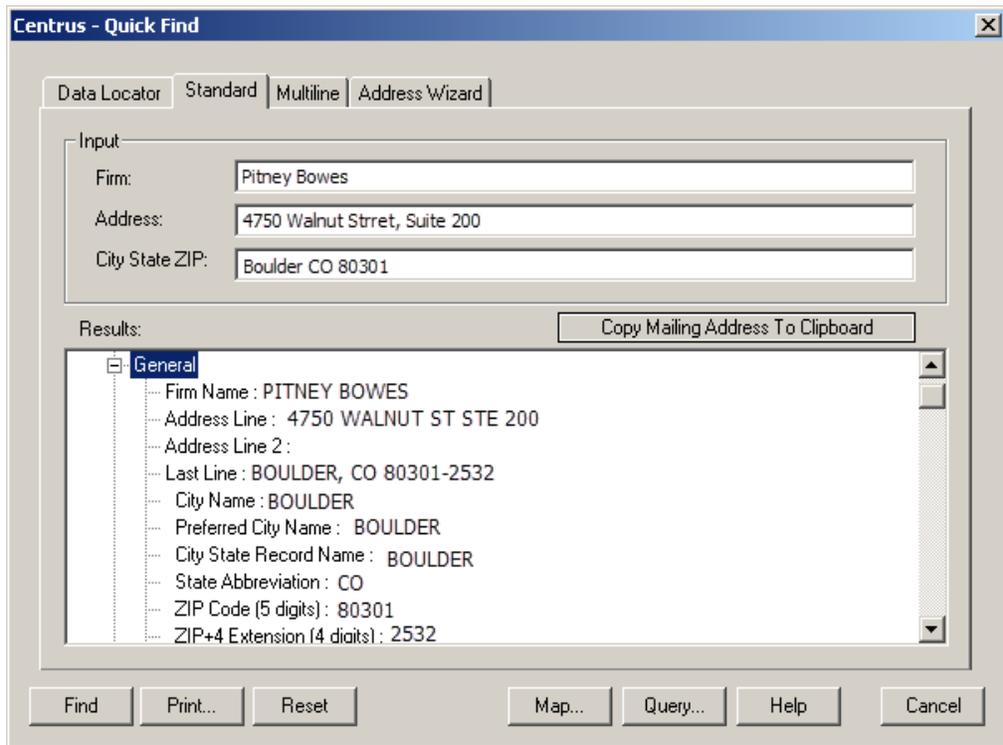


2. Enter address information in the fields provided.

Note: You can enter a complete or partial address.

3. Click **Find** to process the address.

The processed information appears in the **Results** section of the dialog box. Click an item to expand or collapse the information.



Tips/Tricks

- Use the Multiline tab to paste multiple lines of text into **Quick Find**.
- You can copy individual elements to the clipboard by right-clicking and selecting **Copy**.
- Click the **Copy mailing address to clipboard** button to copy the Firm Name (if available), Address Line, and Last Line to another application. The copied information is from the results tree, not the input boxes. Therefore, the information is only available after a successful match.
- Click **Map** at the bottom of the Standard tab to map the current address after a successful match.
- If a match is not made, you can click **Query** to view possible match scenarios.
- Click **Print** to display the output in Notepad.

Using Map Viewer

Map Viewer provides you with a way to see the location of the geocoded address, as well as street layers and other spatial layers you defined.

To use Map Viewer:

1. Select **Tools > Map Viewer**. The Locator window appears:



2. Locate a street by entering the street address, city, state, and ZIP Code (if known). Click the **Zoom Street** button to display all street segments in the specified city with a matching street name.

– or –

Locate a city by entering either the city name and the state abbreviation, or a ZIP Code. Click the **Zoom City** button to display the streets in the city or ZIP Code within the map window.

Note: When using the Zoom Street function, enter only the street name in the Street field. For example, enter *West Louisiana Avenue as Louisiana*.

The following are descriptions of the Map Viewer buttons, and the actions you can complete by using each button:

	Redraw	Redraws the map at the same scale.
	Zoom In	Zooms in on the current map view, increasing the magnification while showing a smaller area.
	Zoom Out	Zooms out on the current map, decreasing the magnification while showing a larger area.
	Center	Centers the map on the point that you click.
	Select	Manually places a point on the map.
	Info	Provides information about a street segment.
	Locator	Opens the Locator dialog box, where you can enter an address or city to locate.
	Layers	Opens the Layers dialog box, where you can set the different layers and attributes that appear on the map.
	Zoom to Extent	Provides a way to choose a geographic layer (point, line, or polygon) and zoom out to the smallest zoom that contains all of the features.



Help

Opens the online help where you can find more information on the active window.



OK

Accepts the most recently geocoded location and closes the Map Viewer.

Tips/Tricks

Centrus Desktop automatically includes spatial layers added with the Point-in-Polygon, Closest Site, and Geographic Determination modules.

Updated 04-19.

Information in this document is subject to change without notice. Companies, names and data used in examples herein are fictitious unless otherwise noted. No part of this document may be reproduced or transmitted in any form or by any means, electronic or mechanical, for any purpose, without the express written permission of Pitney Bowes Software.

Copyright © 2019 Pitney Bowes Software Inc.

Centrus and Pitney Bowes Software are registered trademarks of Pitney Bowes Inc. The Pitney Bowes Software Logo and the Centrus Logo are trademarks of Pitney Bowes Software. All other trademarks are property of their respective companies.