

# GeoTAX<sup>®</sup> Premium

Version 7.4

## Technical Notes



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# Introduction

Pitney Bowes is pleased to announce the GeoTAX Premium 7.4 release. This release is available for Internet download. This document provides an overview of release documentation, release highlights, product updates, database compatibility and platform-specific changes for this release.

**Note:** Although we will continue to provide Level 1 technical support for release versions of GeoTAX prior to 7.4, any future product updates will only be provided for the 7.4 version of this product.

## Release Documentation

The technical notes, release announcement and User's Guide for GeoTAX Premium 7.4 are available for viewing and download from the Pitney Bowes Software Support Web site, <http://www.q1.com/support>. To access these documents, log into the Support site and select **Documentation**. Then, select **Technical Product Info** for the technical notes, **Customer Communications** for the release announcement or **User Documentation** for the User's Guide.

## Highlights and General Enhancements

The enhancements and new features introduced in GeoTAX Premium 7.4 include:

- **New PBKey Output Field for Matches to Master Location Data**  
A new output field, PBKey, is now available for addresses that return a match to Master Location Data. The pbKey™ unique identifier is a persistent, unique address identifier.
- **Extended Match Code for House Number, Unit Number and Unit Type Matching**  
A new Extended Match Code has been added that appends a 3<sup>rd</sup> hex digit to the match code. The Extended Match Code returns additional information about any changes in the matched address from the input address for house number, unit number and unit type. In addition, it includes when input information in the input address line has been ignored. This is particularly useful in identifying whether or not the input unit number was specifically matched, or just the main address was matched, for a multi-unit address.
- **New Landmark Auxiliary file template**  
A new file template for Windows and UNIX/Linux systems is available to more easily create a Landmark Auxiliary file.
- **Improved Matching of Alphanumeric House Numbers**  
Improvements have been made in cases where the input address has an alphanumeric house number.
- **Enhancements to Intersection Matching**  
Enhancements have been made to provide a single, best match when either multiple intersection candidates are returned or when there is an interpolated intersection match.
- **Enhanced Matching to Landmark Auxiliary file**  
Various enhancements have been made when matching to a Landmark Auxiliary file.
- **Extreme Performance Improvement for Landmark Auxiliary File**  
Improved performance when matching to a Landmark Auxiliary file. Using a 300,000 record Landmark Auxiliary file, the startup time improved by 99% and the runtime performance improved by 98%.
- **Return full Insurance Premium Districts (IPD) name**  
The IPD data has been modified in order to return the full district name instead of the abbreviations that were sometimes returned. This data is not compatible with previous versions.

- **Match Mode Option added to Standard GeoTAX Matcher**

The interactive Standard GeoTAX Matcher now offers the capability to set the match mode. The match mode sets the leniency to use when making a match between your input and the reference data sets. The range of leniency runs from Relax match mode, which is the most lenient and allows a loose match; Close, which requires a close match; and, Exact, which is the most restrictive and requires a very tight match.

## Product Updates

### New PBKey Output Field for Matches to Master Location Data

A new output field, PBKey, is now available for addresses that return a match to Master Location Data. This field is a persistent identifier for an address. The pbKey™ unique identifier serves as a lookup key with Pitney Bowes GeoEnrichment datasets to add attribute data for an address location. The leading character is a 'P'. For example, P00001XSF1IF. The following sections describe the PBKey output field for the GeoTAX APIs.

#### Batch processing

##### GEOOUT parameter record

Position	Name	Description	Comments
64-66	Location to store 13-byte PB Key	The pbKey™ unique identifier is returned when a match is made to the Master Location Dataset (MLD). This field is a persistent identifier for an address. The pbKey™ unique identifier serves as a lookup key with Pitney Bowes GeoEnrichment datasets to add attribute data for an address location.  The leading character is a 'P'. For example, P00001XSF1IF.	Optional

#### Integrator Series API

Data Structure	Element	Data Type
GTXOUTPUT	szAMPBKey	Char [13+1]

#### Callable Functions Matcher Output Area

Position	Name	Length	Contents
5673-5685	MOA-ADDR-PB-KEY	13	The pbKey™ unique identifier is returned when a match is made to the Master Location Dataset (MLD). This field is a persistent identifier for an address. The pbKey™ unique identifier serves as a lookup key with Pitney Bowes GeoEnrichment datasets to add attribute data for an address location.  The leading character is a 'P'. For example, P00001XSF1IF.

## Extended Match Codes

Extended Match Codes return additional information about any changes in the house number, unit number and unit type fields. In addition, it can indicate whether there was address information that was ignored. The Extended Match Code is only returned for address-level matches (match codes that begin with A, G, H, J, Q, R, S, T or U), in which case a 3rd hex digit is appended to the match code.

When available, the Extended Match Code is returned automatically. Since it is an extension to the Match Code, it is returned in the same location currently used for the Match Code as indicated in the table below.

Batch processing	The <b>Location for 4-byte Address Match Return Code</b> field specified in the ALOUT parameter card.
Integrator Series API	The <b>szAMMatchCode</b> element in the GTXOUTPUT Output Structure.
Callable Functions	The <b>MOA-ADDR-MATCH-CODE</b> field in the Matcher Output Area (MOA).

**NOTE:** A typical match code contains up to 4 characters: a beginning alpha character followed by 2 or 3 hex digits. The third hex digit is only populated for intersection matches or as part of the Extended Match Code.

“Address information ignored” is specified when any of the following conditions apply:

- The output address has extra information; for example, a mail stop.
- The output address has a second address line (**Address Line 2**).
- The input address is a dual address (two complete addresses in the input address). For example, “4750 Walnut St. P.O Box 50”.
- The input last line has extra information that is not a city, state or ZIP Code, and is ignored. For example, “Boulder, CO 80301 USA”, where “USA” is ignored when matching

Input Addressline	Output Addressline	Extended Code	Description
4750 WALNUT ST STE 200	4750 WALNUT ST STE 200	0	Matched on all address information on line, including Unit Number and Unit Type if included.
4750 WALNUT ST C/O JOE SMITH	4750 WALNUT ST	1	Matched on Unit Number and Unit Type if included. Extra information on address line ignored. Extra information not considered for matching moved to <b>Address Line 2</b> .
4750 WALNUT ST UNIT 200	4750 WALNUT ST STE 200	2	Matched on Unit Number. Unit Type changed.

4750 WALNUT ST UNIT 200 C/O JOE SMITH	4750 WALNUT ST STE 200	3	Matched on Unit Number. Unit Type changed. Extra information on address line ignored. Extra information not considered for matching moved to <b>Address Line 2</b> or Mail Stop field.
4750 WALNUT ST STE 2-00	4750 WALNUT ST STE 200	4	Unit number changed or ignored.
4750 WALNUT ST STE 2-00 C/O JOE SMITH	4750 WALNUT ST STE 200	5	Unit Number changed or ignored. Extra information on address line ignored. Extra information not considered for matching moved to <b>Address Line 2</b> .
4750 WALNUT ST STE 400	4750 WALNUT ST STE 400	6	Unit Number changed or ignored. Unit Type changed or ignored. In this example, Suite 400 is not valid for the input address, but the address match is not prevented because of an invalid unit number.
4750 WALNUT ST UNIT 2-00 C/O JOE SMITH	4750 WALNUT ST STE 200	7	Unit Number changed or ignored. Unit Type changed or ignored. Extra information on address line ignored. Extra information not considered for matching moved to <b>Address Line 2</b> .
47-50 WALNUT ST STE 200	4750 WALNUT ST STE 200	8	Matched on Unit Number and Unit Type if included. House Number changed or ignored.
47-50 WALNUT ST STE 200 C/O JOE SMITH	4750 WALNUT ST STE 200	9	Matched on Unit Number and Unit Type if included. House Number changed or ignored. Extra information not considered for matching moved to <b>Address Line 2</b> .
47-50 WALNUT ST UNIT 200	4750 WALNUT ST STE 200	A	Matched on Unit Number. Unit Type changed. House Number changed or ignored.
47-50 WALNUT ST UNIT 200 C/O JOE SMITH	4750 WALNUT ST STE 200	B	Matched on Unit Number. Unit Type changed. House Number changed or ignored. Extra information on address line ignored. Extra information not considered for matching moved to <b>Address Line 2</b> .
47-50 WALNUT ST STE 20-0	4750 WALNUT ST STE 200	C	House Number changed or ignored. Unit Number changed or ignored.
47-50 WALNUT ST STE 20-0 C/O JOE SMITH	4750 WALNUT ST STE 200	D	House Number changed or ignored. Unit number changed or ignored. Extra information on address line ignored. Extra information not considered for matching moved to <b>Address Line 2</b> .
47-50 WALNUT ST UNIT 20-0	4750 WALNUT ST STE 200	E	House Number changed or ignored. Unit Number changed or ignored. Unit Type changed or ignored.

---

47-50 WALNUT ST UNIT 2-00 C/O JOE  
SMITH

4750 WALNUT ST STE 200

F

House Number changed or ignored. Unit  
Number changed or ignored. Unit Type  
changed or ignored. Extra information on  
address line ignored. Extra information  
not considered for matching moved to  
**Address Line 2.**

---

### ***New 3<sup>rd</sup> hex digit Extended Match Code return values***

The following table contains the description of the 3<sup>rd</sup> hex digit Extended Match Code return values:

**NOTE:** For Auxiliary file matches, the 3rd hex digit is always "0".

<b>Code</b>	<b>In 3rd hex position means:</b>
0	Matched on all address information on line, including Unit Number and Unit Type if included.
1	Matched on Unit Number and Unit Type if included. Extra information on address line ignored. Extra information not considered for matching moved to <b>Address Line 2.</b>
2	Matched on Unit Number. Unit Type changed.
3	Matched on Unit Number. Unit Type changed. Extra information on address line ignored. Extra information not considered for matching moved to <b>Address Line 2.</b>
4	Unit Number changed or ignored.
5	Unit Number changed or ignored. Extra information on address line ignored. Extra information not considered for matching moved to <b>Address Line 2.</b>
6	Unit Number changed or ignored. Unit Type changed or ignored.
7	Unit Number changed or ignored. Unit Type changed or ignored. Extra information on address line ignored. Extra information not considered for matching moved to <b>Address Line 2.</b>
8	Matched on Unit Number and Unit Type if included. House Number changed or ignored.
9	Matched on Unit Number and Unit Type if included. House Number changed or ignored. Extra information on address line ignored. Extra information not considered for matching moved to <b>Address Line 2.</b>
A	Matched on Unit Number. Unit Type changed. House Number changed or ignored.
B	Matched on Unit Number. Unit Type changed. House Number changed or ignored. Extra information on address line ignored. Extra information not considered for matching moved to <b>Address Line 2.</b>
C	House Number changed or ignored. Unit Number changed or ignored.
D	House Number changed or ignored. Unit Number changed or ignored. Extra information on address line ignored. Extra information not considered for matching moved to <b>Address Line 2.</b>
E	House Number changed or ignored. Unit Number changed or ignored. Unit Type changed or ignored.
F	House Number changed or ignored. Unit Number changed or ignored. Unit Type changed or ignored. Extra information on address line ignored. Extra information not considered for matching moved to <b>Address Line 2.</b>



## New Landmark Auxiliary file template

A new file template for Windows and UNIX/Linux systems is available to more easily create a Landmark Auxiliary file.

The template file is available in the data installation folder delivered with GeoTAX:

- **On Windows:** <InstallationDirectory>\data\LANDMARK.GAX
- **On UNIX/Linux:** <InstallationDirectory>/data/landmark.gax

Where <InstallationDirectory> refers to the folder where you installed GeoTAX.

## Improved Matching of Alphanumeric House Numbers

Improvements have been made in cases where the input address has an alphanumeric house number. There have also been improvements in the handling of alphanumeric house numbers input with a space between numeric and alpha characters.

Input Address	New match results	Old match results
4111 B BAKER LN, NOTTINGHAM, MD 21236  <i>Input address with a space between 4111 and B.</i>	4111B BAKER LN, NOTTINGHAM, MD 21236  Match Code: T80 Location Code: AP02  <i>Now able to match.</i>	Match Code: E020 – street not found.
160 A W HOLLIS ST, NASHUA, NH 03060  <i>Input address with a space between 160 and A.</i>	160A W HOLLIS ST, NASHUA, NH 03060  Match Code: T80 Location Code: AP02  <i>Now able to match.</i>	Match Code: E020 – street not found.

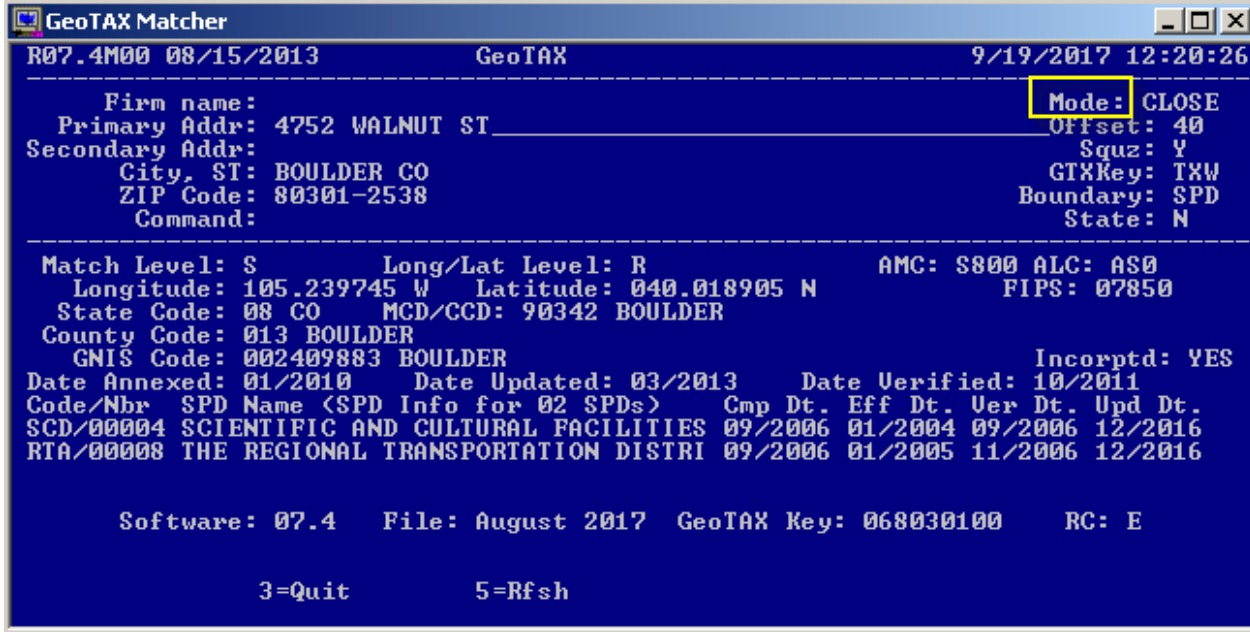
## Enhanced Matching to Landmark Auxiliary file

Various enhancements have been made when matching to a Landmark Auxiliary file:

- Corrected file matching to be consistent for all address fields, now requiring a match on city and state.
- Changed file matching to permit the use of abbreviated or spelled out street types without modification.
- Modified file matching to ignore punctuation differences.

## Match Mode Option added to Standard GeoTAX Matcher

The interactive Standard GeoTAX Matcher now offers the capability to set the match mode (Mode).



```
GeoTAX Matcher
R07.4M00 08/15/2013          GeoTAX          9/19/2017 12:20:26
-----
Firm name:
Primary Addr: 4752 WALNUT ST
Secondary Addr:
City, ST: BOULDER CO
ZIP Code: 80301-2538
Command:
Mode: CLOSE
Offset: 40
Sqz: Y
GTKey: TXW
Boundary: SPD
State: N
-----
Match Level: S      Long/Lat Level: R      AMC: S800 ALC: AS0
Longitude: 105.239745 W  Latitude: 040.018905 N      FIPS: 07850
State Code: 08 CO      MCD/CCD: 90342 BOULDER
County Code: 013 BOULDER
GNIS Code: 002409883 BOULDER      Incorp'd: YES
Date Annexed: 01/2010      Date Updated: 03/2013      Date Verified: 10/2011
Code/Nbr  SPD Name (SPD Info for 02 SPDs)  Cmp Dt.  Eff Dt.  Ver Dt.  Upd Dt.
SCD/00004 SCIENTIFIC AND CULTURAL FACILITIES 09/2006 01/2004 09/2006 12/2016
RTA/00008 THE REGIONAL TRANSPORTATION DISTRI 09/2006 01/2005 11/2006 12/2016

Software: 07.4  File: August 2017  GeoTAX Key: 068030100  RC: E

3=Quit      5=Rfsh
```

The match mode sets the leniency to use when making a match between your input and the reference data sets. Select a match mode based on the quality of your input and your desired output:

- **RELAX** - Allows a loose match and generates the most match candidates. Use this mode if you are not confident that your input is clean. This is the only mode that does not respect the street parity when making an address match.
- **CLOSE** (default) - Requires a close match and generates a moderate number of match candidates.
- **EXACT** - Requires a very tight match and generates the fewest match candidates. Ensure that your input is very clean, i.e., free of misspellings and incomplete addresses.

# Parameter Record Changes

For additional information on parameters, please refer to the *GeoTAX Premium 7.4 User's Guide*.

## Modified Parameter Records

The following parameter records have been modified in GeoTAX release 7.4. Only the changed fields are shown in the tables. For the complete parameter record definition, please refer to the *GeoTAX Premium 7.4 User's Guide*.

### GEOOUT – Geographic Code Output Record

GEOOUT posts geographic codes to your name-and-address records. The 7.4 release adds the new PBKey output field.

GEOOUT Parameter Record Change Description		
<b>Added Fields:</b>		
Position	Field Name	Description
64-66	Location to store 13-byte PB Key	The pbKey™ unique identifier is returned when a match is made to the Master Location Dataset (MLD). This field is a persistent identifier for an address. The pbKey™ unique identifier serves as a lookup key with Pitney Bowes GeoEnrichment datasets to add attribute data for an address location.  The leading character is a 'P'. For example, P00001XSF1IF.

# Callable Functions Changes

## GTMATCH – GeoTAX Matcher Program

### Matcher Output Area (MOA) Changes

- No fields were removed in the 7.4 release.

#### New Fields

Matcher Output Area (MOA):			
<b>New fields:</b>			
Position	Field Name	Length	Contents
5673-5685	MOA-ADDR-PB-KEY	13	The pbKey™ unique identifier is returned when a match is made to the Master Location Dataset (MLD). This field is a persistent identifier for an address. The pbKey™ unique identifier serves as a lookup key with Pitney Bowes GeoEnrichment datasets to add attribute data for an address location.  The leading character is a 'P'. For example, P00001XSF1IF.

### **Modified Fields**

<b>Matcher Output Area (MOA)</b>			
<b>Modified fields:</b>			
<b>Position</b>	<b>Field Name</b>	<b>Length</b>	<b>Contents</b>
5685-5799	Reserved	114	

## Integrator Series Changes

[geotax.h](#)

### **Modified GTXOUTPUT data structure**

#### ***New element:***

```
char szAMPBKey[13+1];          /* PBKey */
```

# Fixed Change Requests and Known Issues

## Fixed Change Requests

The list below represents all of the change requests addressed in this release. Please review this list carefully to determine whether the following corrections apply to your situation.

Item Number	Change Request	Description
CENTRUS-10361 MMCUSTSUP-884	Case 07633466	Fixed an issue with a singleline input address without lastline information returning incorrect results.
CENTRUS-10407		Resolved an issue with USPS-only records tagged as MLD data causing a crash.
GEOTAX-1711		Corrected an issue where the Lat/Long Level indicator was blank on a multimatch.
GEOTAX-1761		Modified the IPD.txb file to return the full name of an Insurance Premium District.
GEOTAX-1783		Fixed an issue with installing GeoTAX on Windows 7 where the G1GTX and G1DB variables were no longer defined after the installation.
SGI-2302		Fixed crash occurring in multithreaded processing caused by forward and reverse geocoding using the same handle.

## Known Issues

There are no known issues for this release.

# GeoTAX Premium Installation – Uninstall Recommended

**NOTE:** You will need to uninstall existing versions of the software prior to installing the new release for best results. This will ensure that all software components are installed correctly for the new release. Failure to uninstall prior to installing the new release may produce unpredictable results.

## Upgrade Path

While we strive to maintain backwards compatibility, the change to a single-step process will require some minor changes to existing processes. This section is intended for users that are upgrading from GeoTAX version 6.1.4 or older.

For batch processing, change the input file in the GeoTAX batch driver to what was being used as input to Code-1 Plus. The next step is to copy the address output storage locations from your Code-1 Plus parameter card to create the new ALOUT parameter card in GeoTAX Premium as illustrated in the following examples.

### Code-1 Plus

```
*          1          2          3          4          5          6          7          8
*2345678901234567890123456789012345678901234567890123456789012345678901234567890
FILEDF C1BMNAM  L00874 00874
FILEDF C1BMCOK  L00874 00874
CONFIG M M M N 1          P          S          Y
PGMNAM C1MATCHB C1MATCHL
CONTRL
ADDRDF L 041 40 001 40
CS ZIP S 111 C 081 28 109 02          116 C
AM OUT          120
SA OUT          001 40 041 40
CS OUT          081 28 I          109 I          C
Z5 OUT          111
Z4 OUT          116
HEADER
REPORT Y N N N N N N Y N N N N N N N N N N          Y
```

### GeoTAX

```
*          1          2          3          4          5          6          7          8
*2345678901234567890123456789012345678901234567890123456789012345678901234567890
FILEDF GTBMPRM  00080 08000
FILEDF GTBMNAM  L02000 02000
FILEDF GTBMCOK  L02000 30000
ADDRDF L 041 40 001 40
CS ZIP S 111 C 081 28 109 02          116 C
GEOOUT 124          129 131          148          127
LLOUT 125          400 C C Y
SPDOUT 208          210 215
SPDOUT          255 260
SPDOUT          300 305
SPDOUT          345 350
PCOUT 134 168          126          128          139
REPORT N N
HEADER
```

## New GeoTAX Premium

```

*           1           2           3           4           5           6           7           8
*234567890123456789012345678901234567890123456789012345678901234567890
FILEDF GTBMPRM   00080 08000
FILEDF GTBMNAM   L02000 02000
FILEDF GTBMCOK   L02000 30000
ADDRDF L 041 40 001 40
CS ZIP S 111 C 081 28 109 02          116 C
ALOUT 120 001 40 041 40 081 28 109 111 116
GEOOUT 124          129 131          148          127
LLOUT 125          400   C C Y
SPDOUT 208          210 215
SPDOUT          255 260
SPDOUT          300 305
SPDOUT          345 350
PCOUT 134 168          126          128          139
REPORT N N
HEADER

```

If your system relies on a custom program to process your customer data the change to single step processing is also a relatively simple change. The simplified COBOL code examples below provide an example of the needed changes. Any references to Code-1 Plus can be removed and the input address elements are then moved directly to the GeoTAX calling area.

## Existing two-step processing

```

*** CODE 1 PLUS SETTINGS AND CALL

    MOVE INPUT-STREET-INFO TO P9IAD1.
    MOVE INPUT-CITY-STATE  TO P9ICST.
    MOVE INPUT-ZIP-CODE    TO P9IZIP.
    MOVE INPUT-ZIP-4       TO P9IZIP4.

    CALL "C1MATCHL" USING P9IN P9OUT P9AUDIT.

* Optional logic for handling of cleansed address

*** GEOTAX SETTINGS AND CALL

    MOVE "N"                TO MCA-BMN.
    MOVE "N"                TO MCA-GTX.
    MOVE "B"                TO MCA-LATLONG-OFFSET.
    MOVE SPACES              TO MIA-STREET-1.
    MOVE P9OSAD              TO MIA-STREET-1.
    MOVE SPACES              TO MIA-CITY.
    MOVE P9OCTL              TO MIA-CITY.
    MOVE P9OSTA              TO MIA-STATE.
    MOVE P9OCZP              TO MIA-ZIP.
    MOVE P9OZP4              TO MIA-Z4.
    MOVE SPACES              TO MATCHER-OUTPUT-AREA.

    CALL "GTMATCH" USING MATCHER-PARAMETERS.

* Optional logic for handling of jurisdiction assignments

```

## GeoTAX Premium one-step processing

```
*** GEOTAX SETTINGS AND CALL

MOVE "N"           TO MCA-BMN.
MOVE "N"           TO MCA-GTX.
MOVE "B"           TO MCA-LATLONG-OFFSET.
MOVE SPACES        TO MIA-STREET-1.
MOVE INPUT-STREET-INFO TO MIA-STREET-1.
MOVE INPUT-CITY-STATE TO MIA-STREET-3. * Use if City and State are in the same input field
MOVE SPACES        TO MIA-CITY.
MOVE INPUT-CITY     TO MIA-CITY.
MOVE INPUT-STATE    TO MIA-STATE.
MOVE INPUT-ZIP-CODE TO MIA-ZIP.
MOVE INPUT-ZIP-4    TO MIA-Z4.
MOVE SPACES        TO MATCHER-OUTPUT-AREA.

CALL "GTMATCH" USING MATCHER-PARAMETERS.

* Optional logic for handling of cleansed address
* Optional logic for handling of jurisdiction assignments
```

This same logic applies to applications that utilize the Enterprise Tax Module on the Spectrum Platform. Custom programs or data flows that use the ValidateAddress service can now pass their input records directly to the AssignGeoTAXInfo service.

## Database Compatibility

The following information should be noted for database compatibility for the GeoTAX Premium 7.4 release:

- There are no data format changes to the street and point data sets for this release.
- The Insurance Premium Districts (IPD) data has been modified in order to return the full district name instead of the abbreviations that were sometimes returned. This data is not compatible with previous versions.

## Platform-specific Changes

### Retired and Unsupported Platforms

Please note that we are no longer supporting:

- Windows 7 32-bit
- HP-UX 11.i 32-bit
- HP-UX 11.23 Itanium 32-bit
- Solaris 10 32-bit
- RedHat Enterprise Linux 4.0 32-bit and 64-bit
- RedHat Enterprise Linux 5.0 32-bit

GeoTAX Premium 7.4 is currently not supported on the following platform:

- IBM i



## AIX

By default, AIX processes use 256 MB of memory. To avoid encountering memory problems using GeoTAX, please update your environment with the variable list below prior to starting your daemon:

```
export LDR_CNTRL=MAXDATA=0xN0000000  
rc.osseal start
```

**NOTE:** where N is in 0xN0000000, N can be any number 1 through 8.

## For Further Assistance

If you have any questions about this release, please contact us via the web, email, or phone for further assistance:

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

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