



Location Intelligence

Auxiliary File Editor

Version 1.0

User's Guide

April 2018



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Introduction

This document provides information on the Auxiliary File Editor, which creates User Auxiliary files for use in GeoTAX. For information on matching against a User Auxiliary file, see the GeoTAX manuals for your platform.

Installation

The Auxiliary File Editor resides on the GeoTAX Utilities installation media delivered to all GeoTAX customers. To install the editor, click **Setup.exe** located in the *AuxFileEditor* folder on the GeoTAX Utilities media and follow the installation wizard instructions.

Important: Pitney Bowes provides the Auxiliary File Editor only on Windows. All GeoTAX users can use the Auxiliary File Editor on Windows and use the resulting file on the platform for which they have licensed GeoTAX.

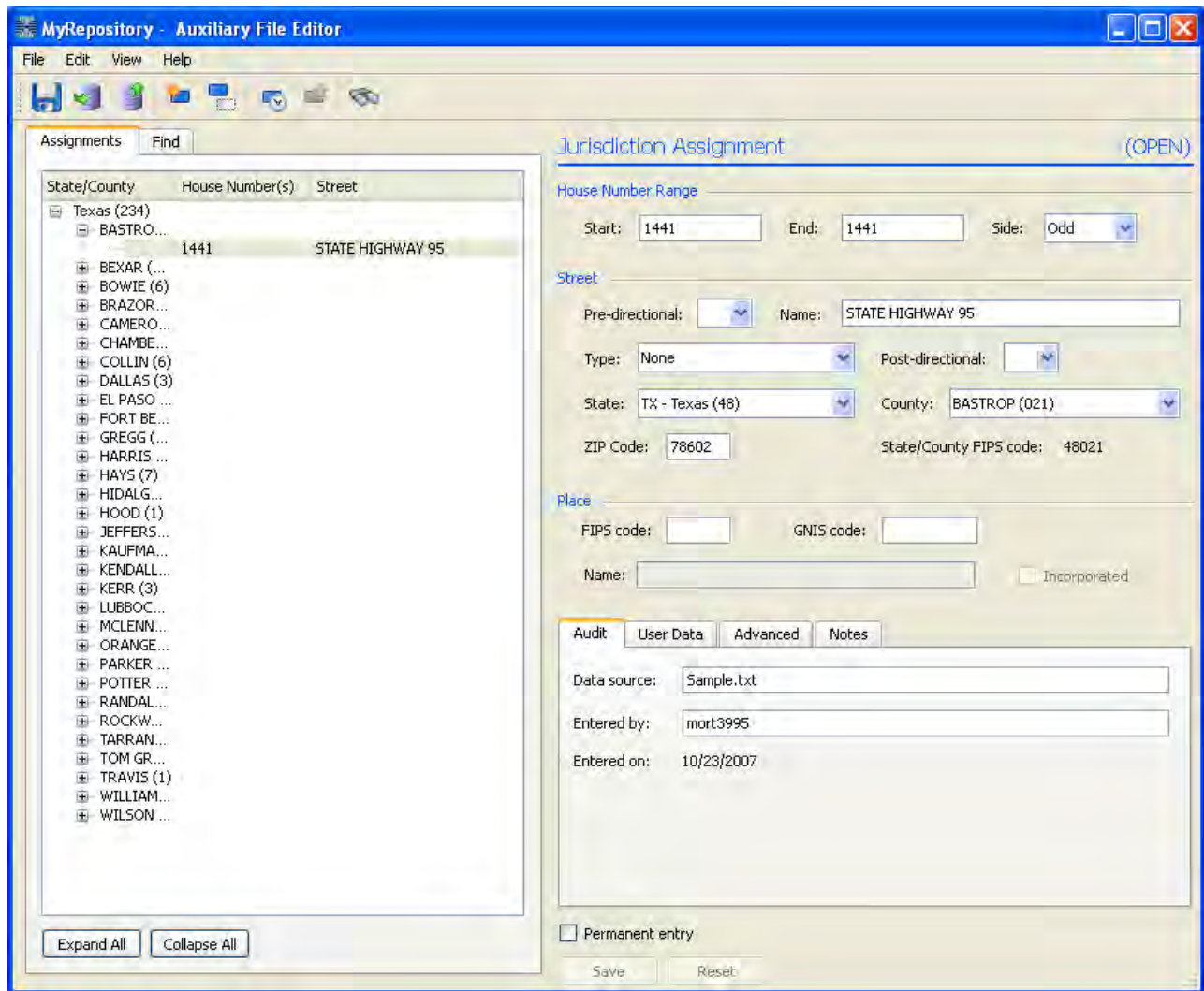
Overview

Using the Auxiliary File Editor you can:

- Export records into a User Auxiliary file
- Save multiple User Auxiliary files for different runs
- Resolve conflicts in record information
- Search for specific records
- Archive records no longer needed
- Import data

The editor uses repositories to store information. A repository is similar to a database and contains user-defined auxiliary records along with status and audit information for the records.

The editor contains two main sections, a navigation pane on the left and an entry form on the right.



The navigation pane contains the columns State/County, House Number(s), and Street. The number in parentheses after the state and county indicate the number of records associated with the state and county. This list is alphabetical by state, county, then street. When you click and highlight a record in the navigation tree, the details of that record display on the right side of the editor in the entry form.

Importing a User Auxiliary File

If you have an existing User Auxiliary file you can import this file and do not need to enter each record individually into the editor. The Import Wizard will recognize the file as an Auxiliary file and it is automatically imported.

The editor supports data (.dat), ascii (.asc), and text (.txt) files. The file you are importing must follow the layout described in “User Auxiliary File Format” on page 20.

To import a User Auxiliary file:

1. Open the repository in which to import the file by selecting **File > Repository > Open** and browsing to the repository.

If you are using the editor for the first time, it opens to the default MyRepository. If you have previously used the editor, it opens to the repository you last used. To create a new repository, select **Repository > New**.

2. Choose the file to import by selecting **File > Import** and browsing to the file.
3. Resolve any conflicts displayed in the Data Conflicts Found dialog. See “Importing a User Auxiliary File” on page 5.

Importing from Multiple Formats

If you have a data file containing the address you want in your Auxiliary file you can import this file and do not need to enter each record individually into the editor.

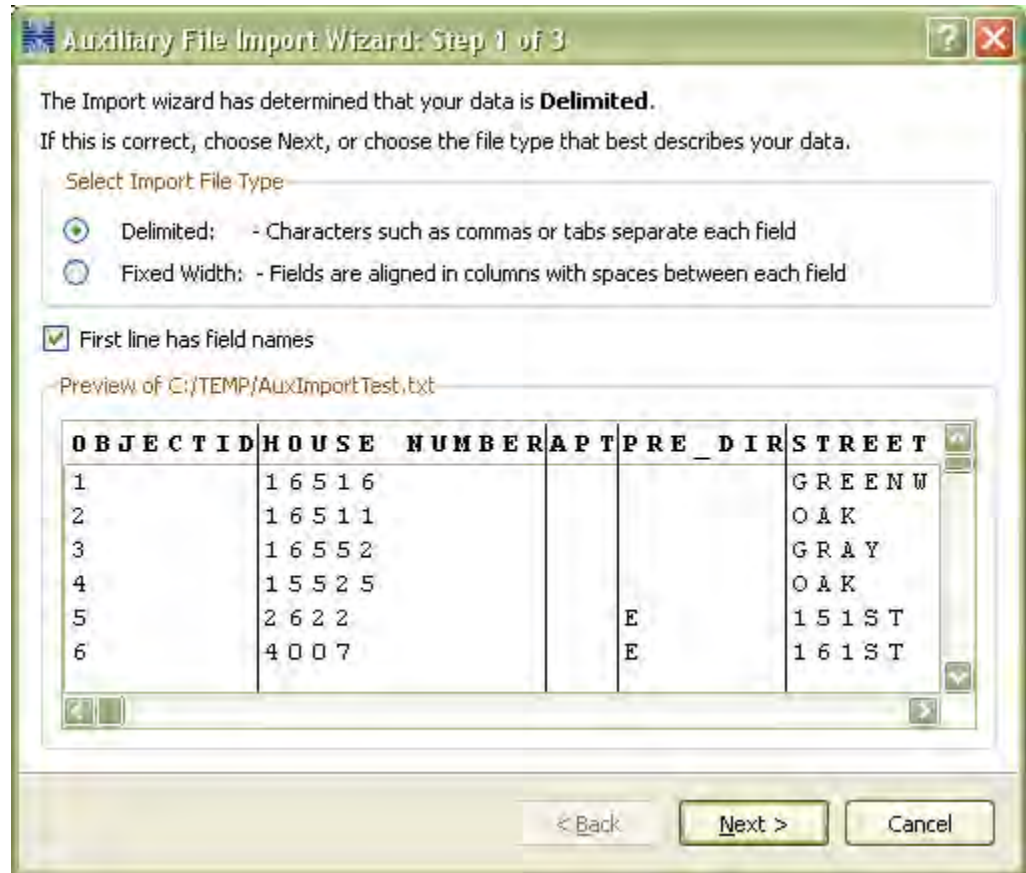
The import wizard supports data (.dat), ascii (.asc), delimited (.csv) and text (.txt) files. The data in the file you are importing must have all of the elements to be imported separated into individual fields. If the address is not imported as individual elements, GeoTAX will not return the expected Auxiliary File jurisdiction assignments.

A full list of fields is described in “User Auxiliary File Format” on page 20.

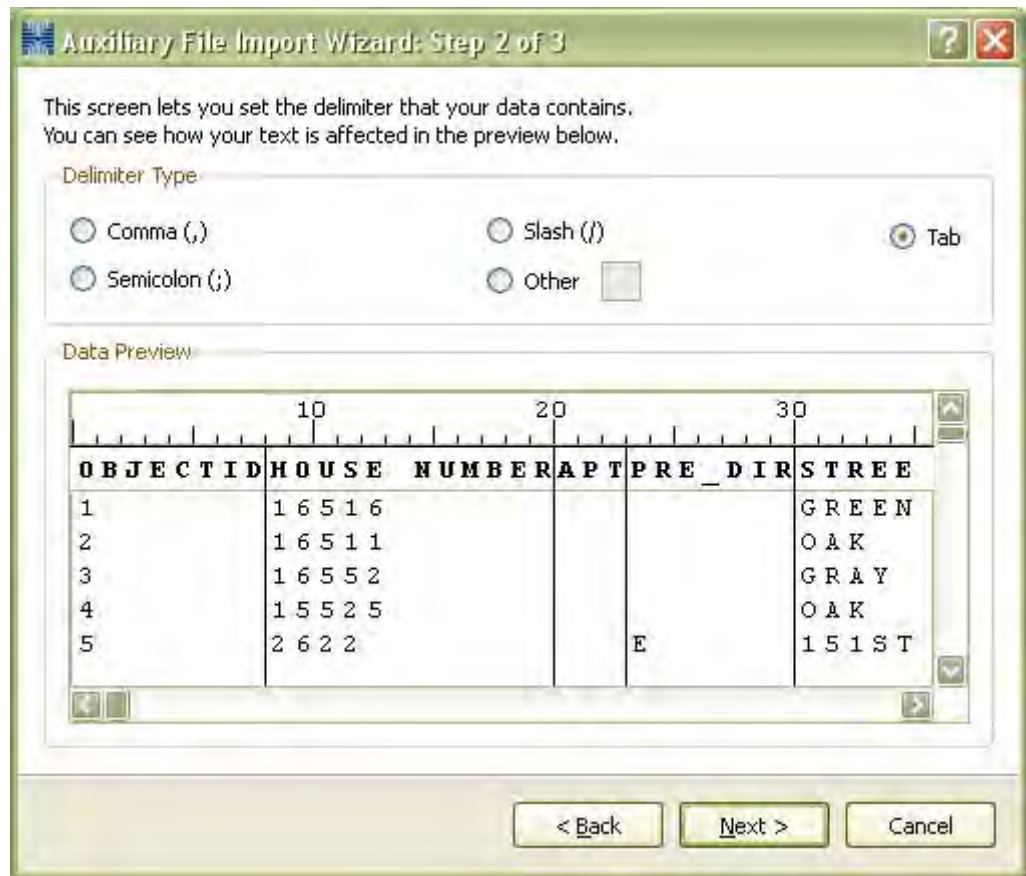
Importing from a Delimited Field File

When importing a file, if the Auxiliary File Import Wizard determines the selected file is Delimited, the window displays the results and provides the option of changing the format to Fixed Width.

1. When the Auxiliary File Import Wizard opens, check the box for First line has field names, if needed, and click **Next**.



2. Change the Delimiter Type if needed for the window to display the data correctly and click **Next**.



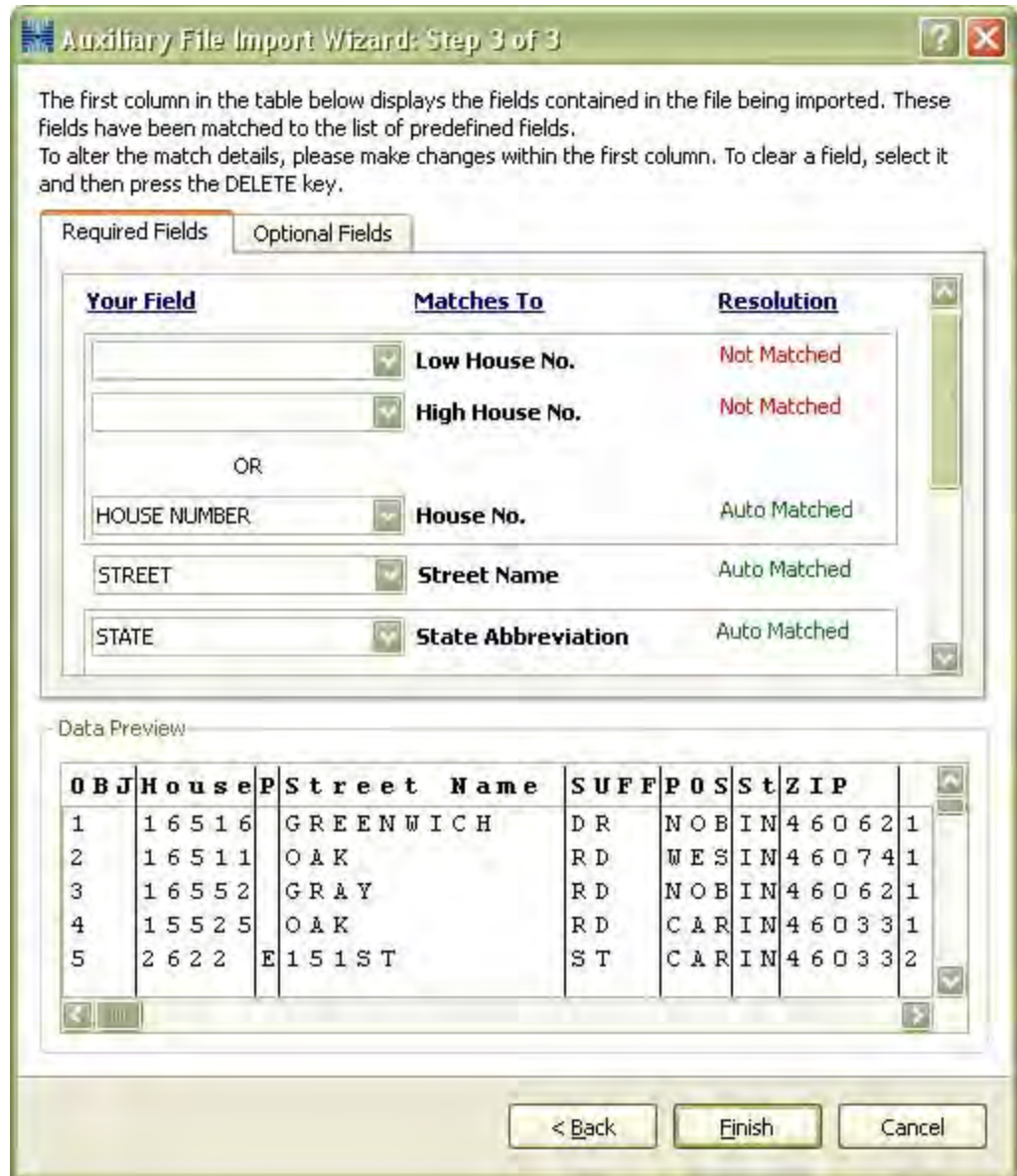
If the data being imported contains field name information, the Auxiliary File Import Wizard attempts to automatically map the input data to the Auxiliary File data.

Note: For data not automatically mapped or mapped incorrectly, click the down arrow in the field name and select the appropriate data field name.

Once an input data field has been matched to an Auxiliary File data field, the field name in the Data Preview is changed to the Auxiliary field name.

The Required Fields tab displays the minimum data fields needed to create an Auxiliary File, all other data fields are available on the Optional Fields tab. It is not mandatory that both the low and high house numbers be in the import file, if only one house number is available it will be used for both in the Auxiliary File.

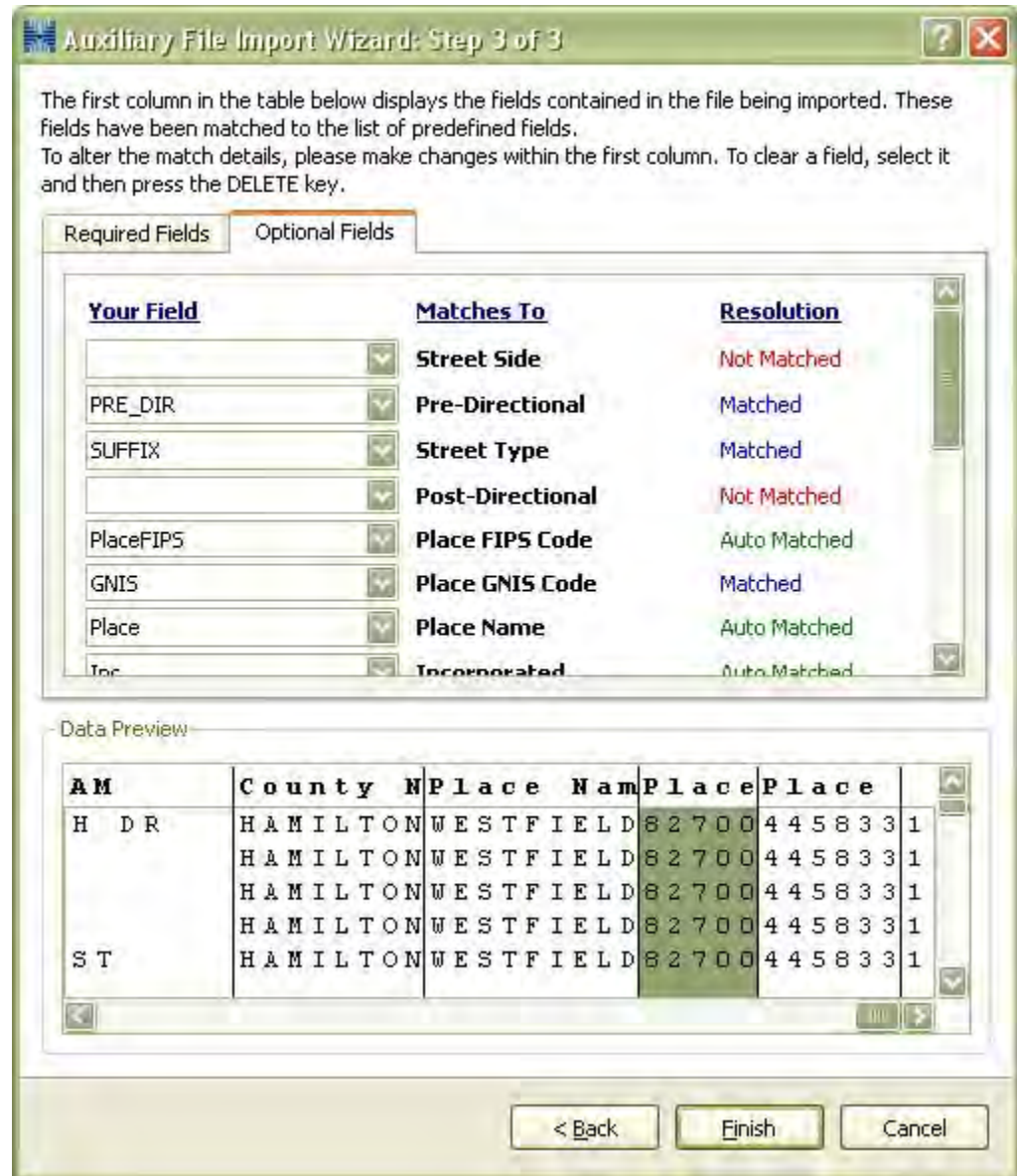
Similarly for the State Abbreviation/State FIPS Code and County Name/County FIPS combinations, if only one field is available, the other will be determined by the Auxiliary File Import Wizard.



Note: Hovering the cursor over the field name in the Data Preview displays the full field name.

Data imported into the Place (municipal) fields of Place FIPS Code, PLACE GNIS Code, Place Name and Incorporated are based on your system requirements. See "User Auxiliary File Format" on page 20 for definitions and allowed entries for the Optional Fields.

1. Click **Finish** when complete.

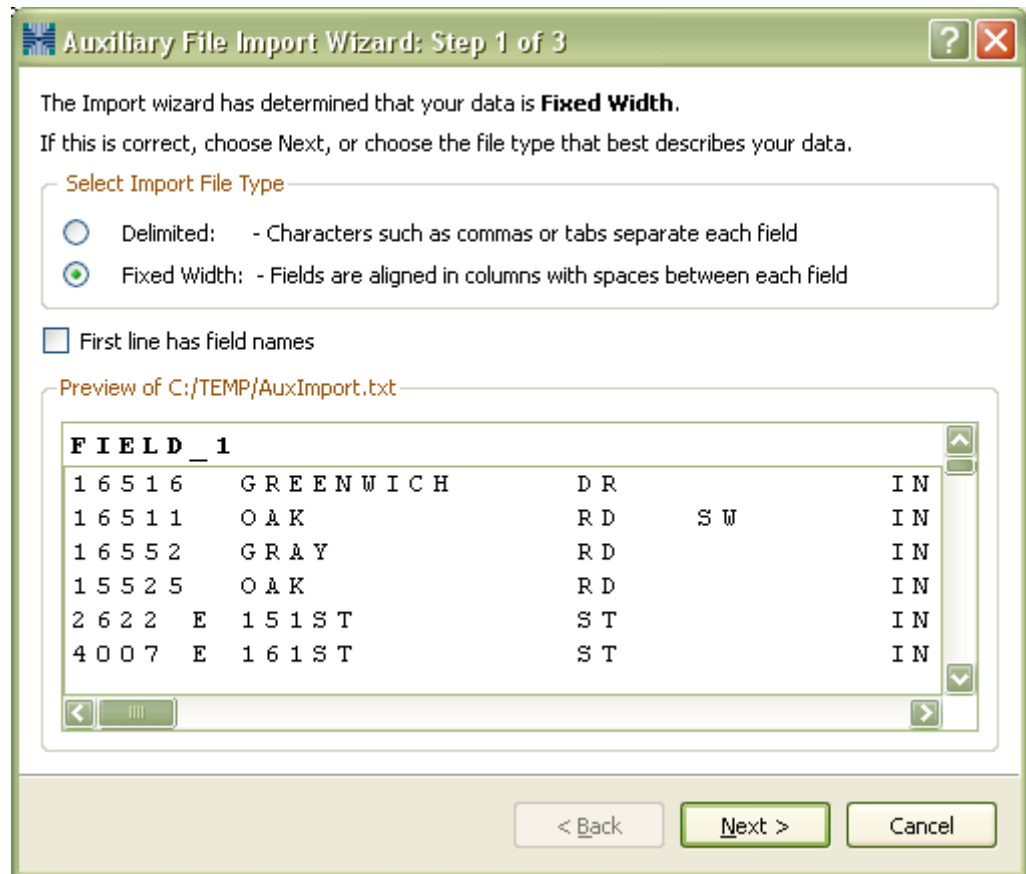


2. Resolve any conflicts displayed in the Data Conflicts Found dialog. See “Conflict Resolution” on page 14.

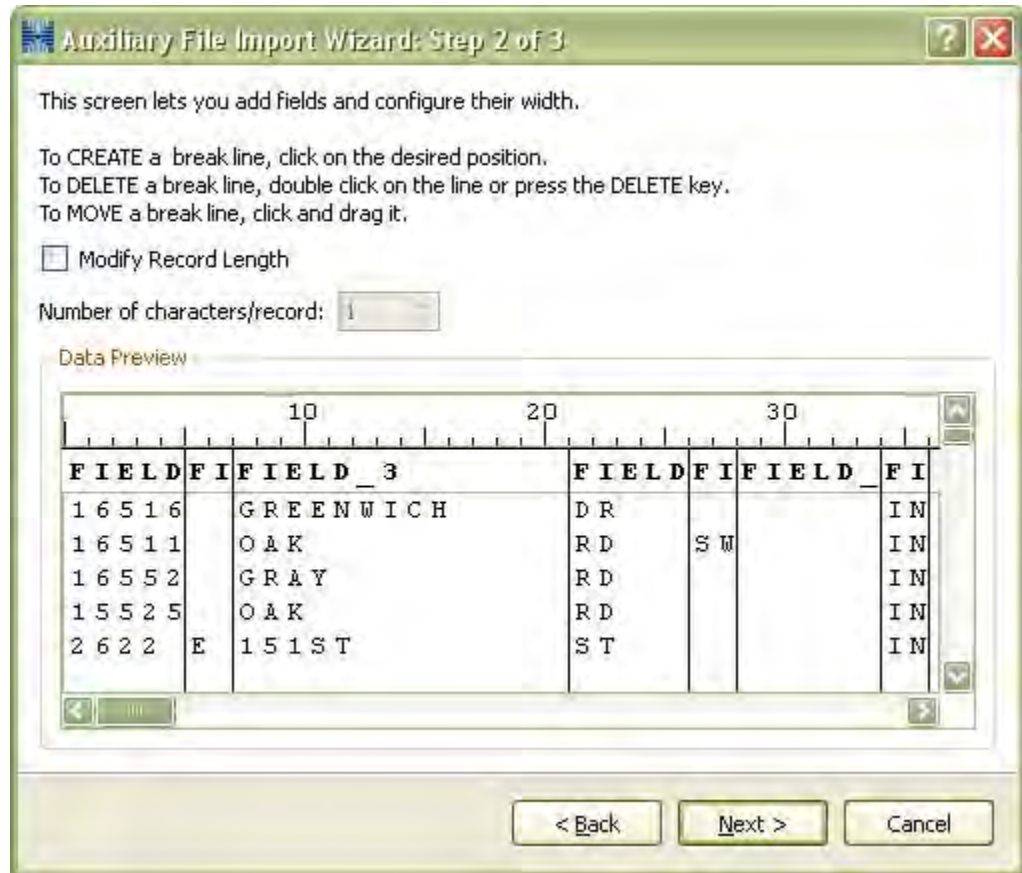
Importing from a Fixed Width File

When importing a file, if the Auxiliary File Import Wizard determines the selected file is Fixed Width, the window displays the results and provides the option of changing the format to Delimited.

1. When the Auxiliary File Import Wizard opens, select the box for First line has field names, if needed, and click **Next**.



2. Modify the length of data record if necessary and define the length of each field by clicking on the desired position in the Data Preview. Click **Next**.



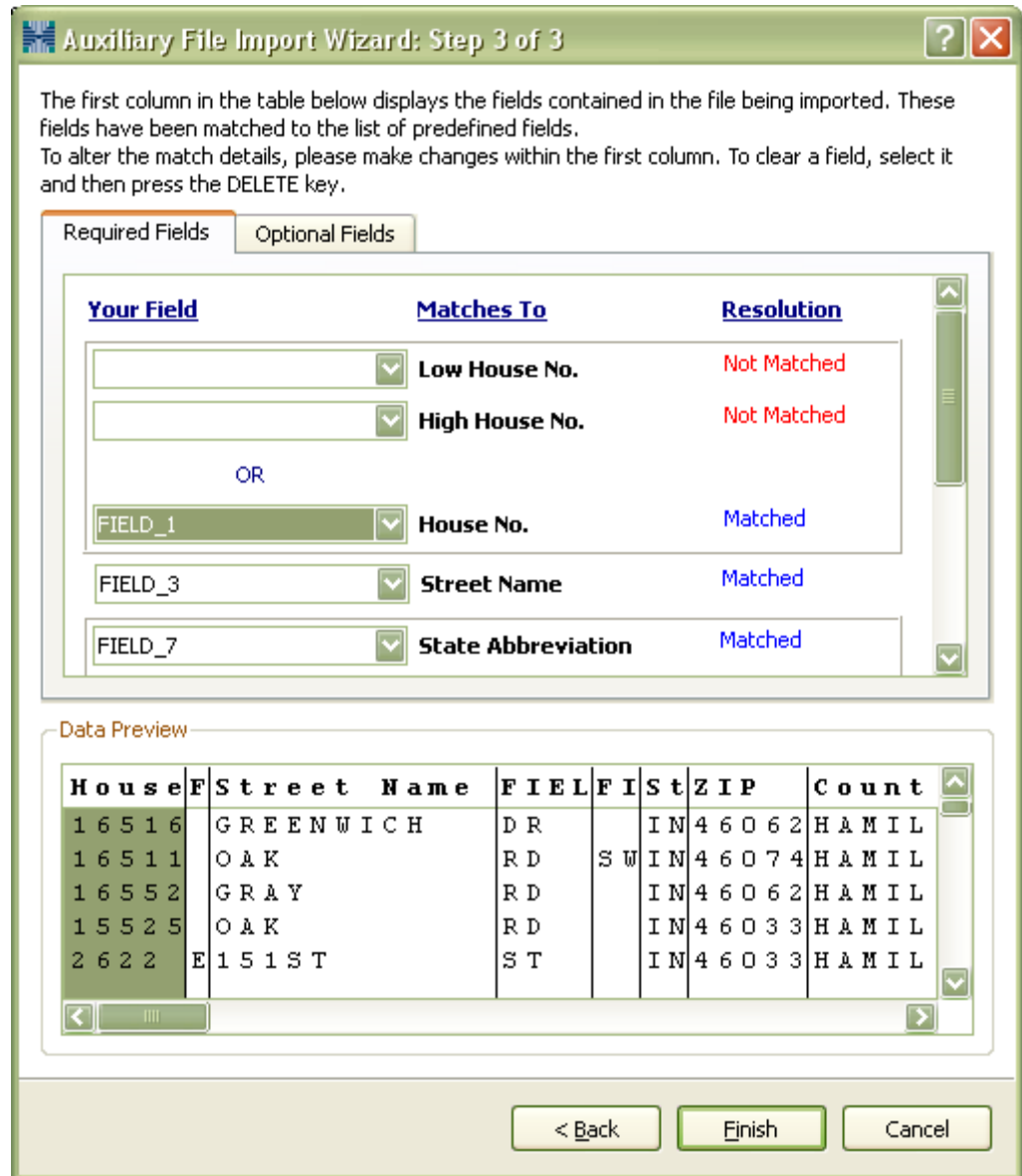
If the data being imported contains field name information, the Aux File Import Wizard attempts to automatically map the input data to the Auxiliary File data.

Note: For data not automatically mapped or mapped incorrectly, click the down arrow in the field name and select the appropriate data field name.

Once an input data field has been matched to an Auxiliary File data field, the field name in the Data Preview is changed to the Auxiliary field name.

The Required Fields tab displays the minimum data fields needed to create an Auxiliary File, all other data fields are available on the Optional Fields tab. It is not mandatory that both the low and high house numbers be in the import file, if only one house number is available it will be used for both in the Auxiliary File.

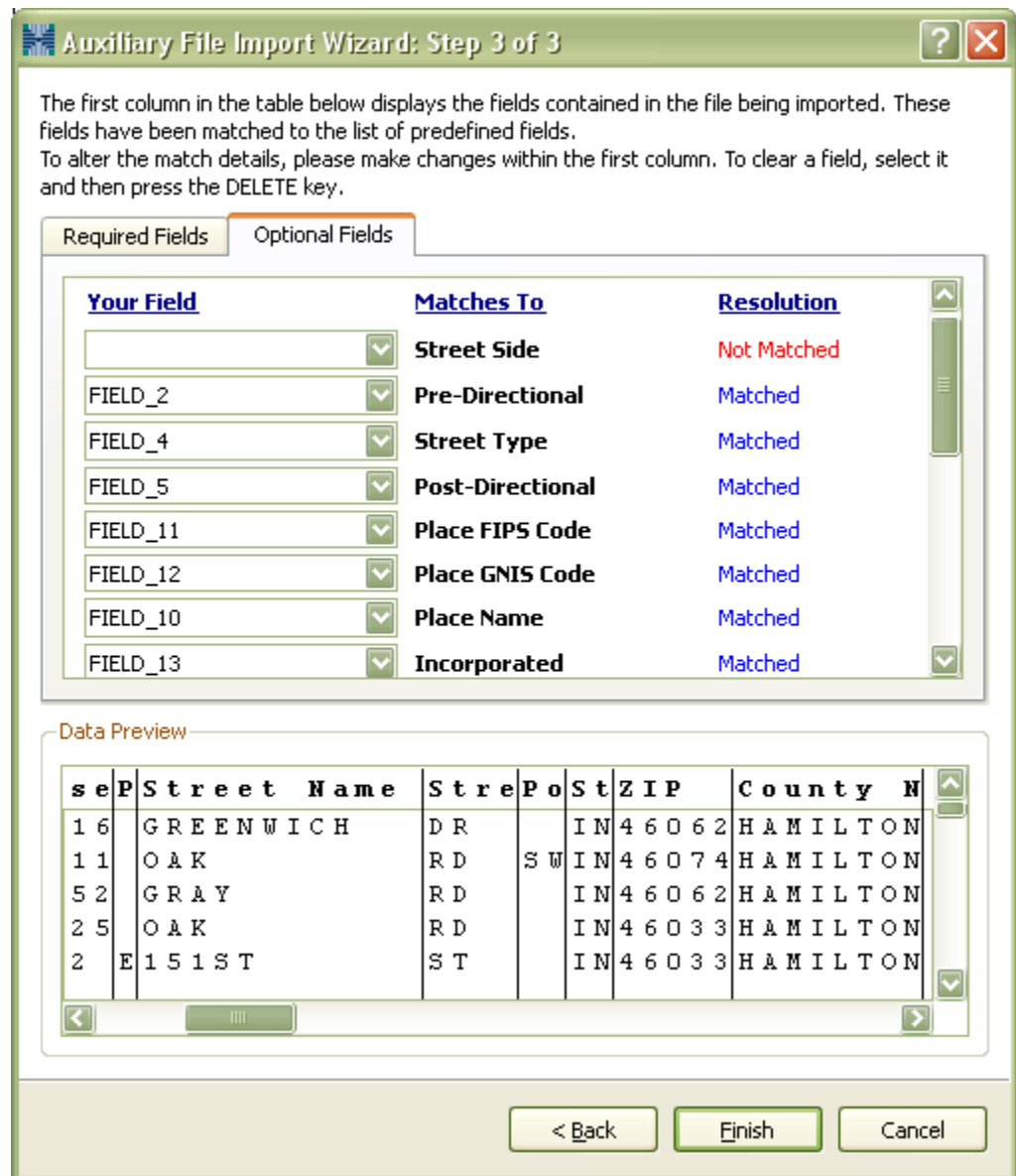
Similarly for the State Abbreviation/State FIPS Code and County Name/County FIPS combinations if only one field is available the other will be determined by the Auxiliary File Import Wizard.



Note: Hovering the cursor over the field name in the Data Preview displays the full field name.

Data imported into the Place (municipal) fields of Place FIPS Code, PLACE GNIS Code, Place Name and Incorporated are based on your system requirements. See “User Auxiliary File Format” on page 20 for definitions and allowed entries for the Optional Fields.

1. Click **Finish** when complete.



2. Resolve any conflicts displayed in the Data Conflicts Found dialog. See “Conflict Resolution” on page 14.

Conflict Resolution

While importing the file, the editor checks for the following conflicts within the data:

- State abbreviations that do not match the state FIPS code field
- County names that do not match the county FIPS code field
- House number range ascending/descending flags that do not match the house number from and to range values

- Records that already exist in the repository (same house number, address, state, and ZIP Code)

Note: These are the ONLY validations performed by the editor.

The editor groups records with the same type of conflict on the same page. When you resolve the conflicts, the editor moves to a new page and populates the page with records with the next type of conflict. This continues until you have removed all of the conflicts. If the editor encounters a conflict with the Street Range Ascend/Descend and the Start/End Range fields, the editor displays a page indicating it automatically corrected the conflicts.

To finish importing the file you must either resolve or skip the conflicts. You skip conflicts by highlighting the conflict and selecting the Skip button. If you skip the conflicts the editor does not import the record.

Note: You can export skipped files into an exception file for future processing. For more information, see “Exporting Records” on page 19.

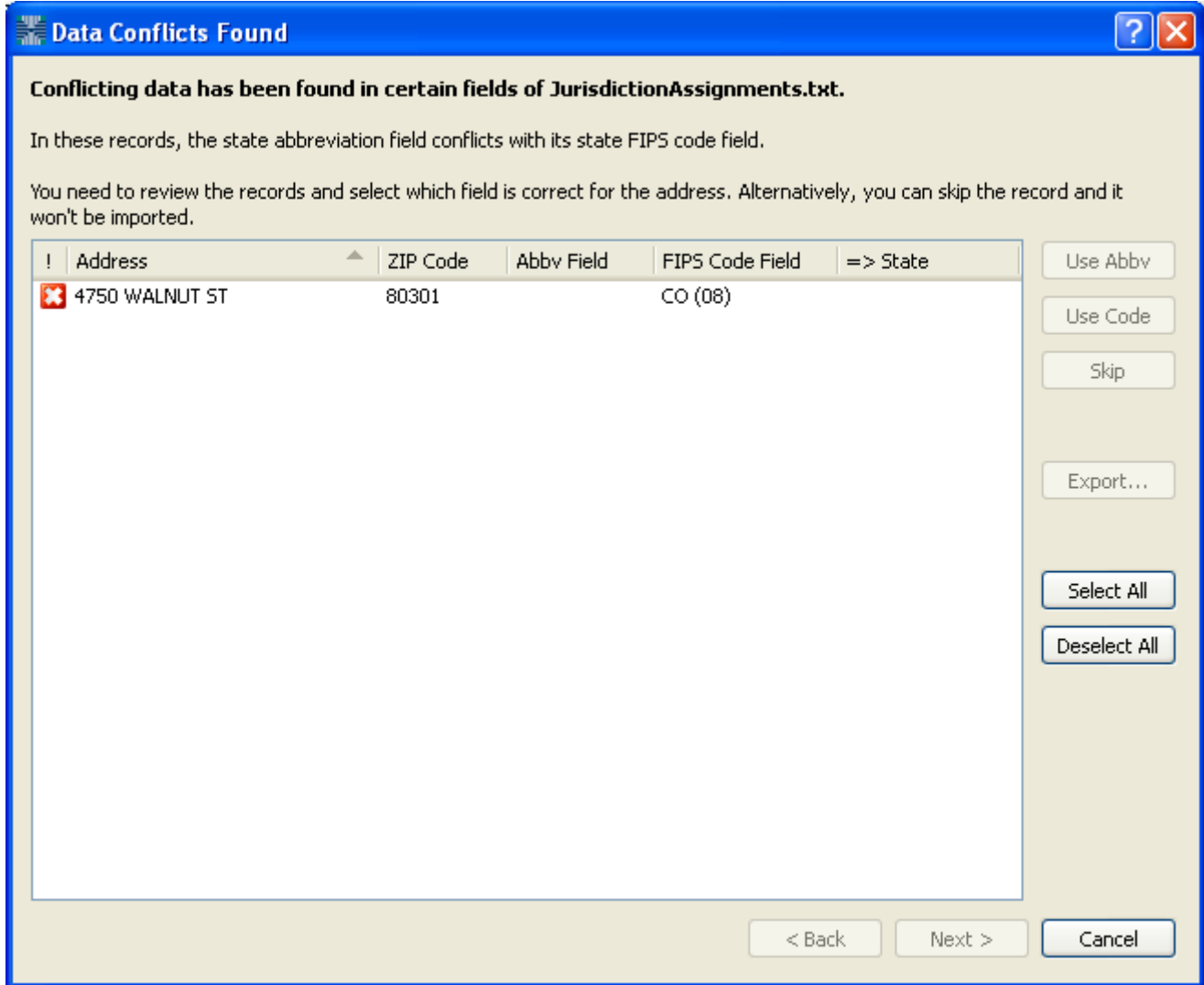
To resolve conflicts:

1. Click on the record you want to resolve.

If the action needed on multiple records is the same, such as skipping the record, you can select more than one record at a time by holding down the Shift or Ctrl keys and clicking on the individual records.

2. Choose the field to use by selecting the appropriate button on the right.

Two options display based on the type of error you are resolving. For example, a conflict with the state abbreviation and state FIPS code displays the buttons Use Abbv and Use Code.



3. After you resolve the conflict, the X at the front of the address turns into a check mark and the final column in the window indicates the selection made.
4. Click **Next** to move to the next conflict page and repeat the conflict resolution process until you reach the final conflicts page.
5. Click **Finish** on the final conflicts page.

The imported records display on the left side of the editor in the navigation pane.

6. Save the records in the repository by selecting **Repository > Save** or **Repository > Save As**.

Entering a New Record

You can input user-defined records directly into the User Auxiliary File Editor.

To enter a new record:

1. Open the repository in which to add the record by selecting **File > Repository > Open** and browsing to the repository.

If you are using the editor for the first time, it opens to the default MyRepository. If you have previously used the editor, it opens to the repository you last used. To create a new repository, select **Repository > New**.

2. Select **Edit > New Assignment**.

The fields in the entry form are empty and the navigation pane is grayed out.

3. Enter information in the fields in the entry form.

Note: If a new record is similar to an existing record in the repository, you can select **Edit > Duplicate Assignment** to populate the entry form.

The following table describes the fields in the entry form.

Field	Description
House Number Range	
Start	<i>(Required)</i> First number in the house number range.
End	<i>(Required)</i> Last number in the house number range.
Side	<i>(Required)</i> Side of the street; either Odd or Even. If you select Odd, the Start and End values must be odd. If you select Even, the Start and End values must be even.
Street	
Pre-directional	Pre-directional of street name (N, S, E, W, NE, SE, NW, SW).
Name	<i>(Required)</i> Street name.
Type	Street type. Selecting Other from the drop-down box displays the Other Street Type dialog where you can define an alternative street type. Note: User-defined street types are not valid USPS types. They should not be included in mailing addresses and should only be used for informational purposes for tax jurisdiction assignment.
Post-directional	Post-directional of street name (N, S, E, W, NE, SE, NW, SW).
State	State abbreviation. The state FIPS code displays in parentheses following the abbreviation.
County	List of counties based on state selection. The county FIPS code displays in parentheses following the abbreviation.
ZIP Code	<i>(Required)</i> USPS ZIP Code.
State/County FIPS code	Read-only. Contains the 5-digit FIPS code for the address based on the state and county values.
Place	

Field	Description
FIPS code	Place FIPS code.
GNIS code	GNIS code.
Name	Place name. Enabled when you enter data in the FIPS code or GNIS code fields.
Incorporated	If seelcted, the place name is incorporated. Enabled when you enter data in the Name field.
Audit (tab) ^a	
Data source	Data source of the Jurisdiction Assignment.
Entered by	Name of the person who entered the record. Defaults to the login ID.
Entered on	Read-only. Date and time the record was created or imported into the repository.
Closed on	Read-only. Date and time the record was closed. Only displays if a record is marked as closed.
User data (tab)	
User data	User-defined data. Up to 300 characters.
Position	Read-only. Position of the cursor in the User data field. Helps monitor the remaining space of the User data field.
Advanced (tab)	
Census tract	Census tract number.
Block group	Block group number.
MCD Code	Minor Civil Division (MCD) code.
MCD Name	MCD name.
MSA Code	Metropolitan Statistical Area (MSA) code.
MSA Name	MSA name.
Class code	Place class code.
Last annexed	Date the place was lasted annexed. When selected, you must specify a date.
Last updated	Date the place was last updated. When selected, you must specify a date.
Last verified	Date the place was last verified. When selected, you must specify a date.
Notes (tab) ^a	Notes in text format about the current record. Stored with the record in the repository but not exported to the User Auxiliary file. Note: This field is limited to 255 characters.
Permanent entry ^a	Selecting indicates the record is a permanent entry. Once permanent, you cannot close the item until you deselect this option. (Any record marked as closed is not included in the User Auxiliary file.)

a. These fields are not exported and will be lost if the previously exported file is re-imported.

4. Click **Save**.

Finding Records

You can search for different attributes of a record using the Find tab in the navigation pane. You select the record element for which you want to search, then type the search criteria in the Find field.

As you type the criteria, the results tree displays all the matching records. As you continue typing, the editor continues to eliminate records from the results tree that do not meet your criteria.

Closing Records

You can close a record once you know that it is no longer needed.

To close the record:

1. Select the record to close in the navigation pane.
2. Select **Edit > Close Assignment**.

The text (Closed) appears in the upper right corner of the entry form.

Note: If you cannot close the record, verify the Permanent entry checkbox on the entry form is not checked.

You may wish to keep closed records for archival purposes. If you do not wish to keep closed records, you can delete the records by selecting **Edit > Delete All Closed Assignments**.

You can reopen a closed record by selecting **Edit > Reopen Assignment**.

Exporting Records

Once you have entered records into the editor, you can export the records into the User Auxiliary file format.

Note: You can also export records with conflicts when importing a file. This allows you to resolve the conflicts at a later time and continue the import process.

1. Select **File > Export** (or the Export button in a conflict page).

The Export Options dialog opens.

2. If needed, change the type of records you want to export and click **OK**.
3. Browse to the file in which to export the files, or create a new file, and click **OK**.

User Auxiliary File Format

The following table describes the layout of the User Auxiliary file. Sort records in ascending order for the ZIP Code, street name, street type, directional, and low house range; and descending order for high house range. This sorting minimizes the time required for street-level matching. The User Auxiliary file has a block size of 8K, a key length of 47 bytes, and a record length of 800 bytes. A sample file named SEQAUX is in the GeoTAX data directory created when you installed GeoTAX.

Position	Field Name	Description	Length
<i>Input Key Area (Must be unique)</i>			
1-5	G1GTAUX-ZIP-CODE	ZIP Code.	5
6-35	G1GTAUX-STREET-NAME	Street name.	30
36-39	G1GTAUX-STREET-TYPE	Street type.	4
40-41	G1GTAUX-PRE-DIR	Pre-directional.	2
42-43	G1GTAUX-POST-DIR	Post-directional.	2
44-47	G1GTAUX-SEQ	Sequence number. Range is 0001-9999.	4
<i>Output Area</i>			
48-58	G1GTAUX-OUTPUT-RANGE-FROM	First number in the house number range (right adjusted, blank-filled).	11
59-69	G1GTAUX-OUTPUT-RANGE-TO	Last number in the house number range (right adjusted, blank-filled).	11
70	G1GTAUX-OUTPUT-ODD-EVEN	Side of the street. O=Odd E=Even	1
71	G1GTAUX-OUTPUT-ASC-DESC	Ascending or descending order. A=Ascending D=Descending	1
72	Reserved		1
73-74	G1GTAUX-STATE-CODE	FIPS State code.	2
75-77	G1GTAUX-COUNTY-CODE	FIPS County code.	3
78-83	G1GTAUX-CENSUS-TRACT	6-digit Census Tract number.	6
84	G1GTAUX-BLOCK-GROUP	1-digit Block Group.	1
85-92	Reserved		8
93-94	G1GTAUX-STATE-ABBV	USPS state abbreviation.	2
95-119	G1GTAUX-COUNTY-NAME	County name.	25
120-124	G1GTAUX-MCD-CODE	5-digit MCD code.	5

Position	Field Name	Description	Length
125-164	G1GTAUX-MCD-NAME	MCD name.	40
165-168	G1GTAUX-MSA-CODE	4-digit MSA code.	4
169-218	G1GTAUX-MSA-NAME	MSA name.	50
219-223	G1GTAUX-PLACE-CODE	5-digit Place Code.	5
224-263	G1GTAUX-PLACE-NAME	Place name.	40
264-265	G1GTAUX-PLACE-CLASS-CODE	2-digit Place Class Code.	2
266	G1GTAUX-PLACE-INC-FLAG	Place incorporation flag. 0 = Unincorporated 1 = Incorporated	1
267-273	G1GTAUX-PLACE-LAST-ANNEXED	Place last annexed date, in the format MM/YYYY.	7
274-280	G1GTAUX-PLACE-LAST-UPDATED	Place last updated date, in the format MM/YYYY.	7
281-287	G1GTAUX-PLACE-LAST-VERIFIED	Place last verified date, in the format MM/YYYY.	7
288-296	G1GTAUX-PLACE-GNIS	GNIS code.	9
297-500	Reserved		204
501-800	G1GTAUX-AUX-AREA	User-defined data.	300



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