
Personator User's Guide

MELISSA DATA

Your Data Superstore

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MELISSA DATA CORPORATION

22382 Avenida Empresa
Rancho Santa Margarita, CA 92688

Phone: 1-800-MELISSA (1-800-635-4772)

Fax: 949-589-5211

E-mail: info@MelissaData.com

Internet: www.MelissaData.com

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1 Installation & Requirements

1.1 Introduction

Welcome to Personator for Windows™. We hope you find it useful and it saves you time, money, and hassle. Call us! We welcome your questions and feedback.

Personator is a data management tool that performs these four functions:

- **Splits Names** Personator parses name fields into their components and deposits them into separate fields.
- **Splits Addresses** Personator parses city/state/zip fields and up to three address lines using the very same street splitter engine found in MatchUp.
- **Genderizes Names** Personator analyzes first names in your data against a first name table and adds a gender prefix (which you can specify). You specify whether the prefix should be put into a separate field or inserted into the First Name.
- **Makes Salutations** Personator creates both Formal ("Dear Prefix LastName") and Informal ("Dear FirstName") salutation fields. The logic is much better than any word processor when dealing with incomplete data. For example, if you specify Informal but a given record's First Name contains initials or is blank, the program will switch to Formal for that record.

Personator 4's new features include direct reading and writing of Excel, Access, dBASE, FoxPro, ASCII, SQL Server, Oracle and DB/2 tables.

For a specific list of changes, see What's New.

1.2 What's New

The following is a short list of new features. You will find many more as you read the manual.

General:

- Directly handle Excel, Access, dBASE, FoxPro and ASCII tables.
- Optional add-ons provide direct handling of SQL Server, Oracle and DB/2 tables.
- Drag and drop interface for files, databases, setups and fields.
- Intelligent guessing of field contents for quicker setups.

Main Window:

- Now has a toolbar for commonly-used commands.
- Customize the look (right-click) with 4 toolbar settings and 3 background settings.

Name Splitter:

- Better determination of name types (Full, Inverse, Government Inverse, etc).
- Better recognition and splitting of dual names.
- User-modifiable dual name connector table.

Address Splitter:

- More accurate address splitting.
- Validation of 5-digit US Zip codes when City/State/Zip splitting.

Processing:

- Added several new error code formats (ASCII, Binary, Hexadecimal and Decimal).

Analyzing:

- The error code field is no longer required to analyze.
- The analyzer has been completely re-tooled into an interactive browser with satellite result windows.
- User-defined colors are used to indicate errors.
- Selected errors can be filtered from the browser.
- Additional columns can be added or removed.
- Manually edit or drag and drop data to make corrections.

Browsing and Tools:

- Updated to MatchUp's technology.

1.3 System Requirements

Personator requires:

- Microsoft® 2000, XP or Vista.
- Intel Pentium III® or better.
- 64 MB of RAM minimum, 128 MB is recommended.
- 10 MB of available hard disk space.

1.4 Installation

It is recommended that you exit all programs before installing Personator.

To Install from a CD:

1. Load the installation CD into your CD-ROM drive.
2. The installation program should start automatically and the install program will start.
3. Follow the on-screen instructions.

If Installation does not Start Automatically:

1. Click **Start** on the Task Bar.
2. Click **Run...**
3. Type **d:\setup.exe** (where **d:** is your CD-ROM's drive letter).
4. Follow the on-screen instructions.

To Install from an Activation E-Mail:

To purchase Personator via an electronic download, Melissa Data must be provided with a valid e-mail address. Electronic orders are followed by a ground shipment of the CD and manual, which are your proof of ownership.

1. Download and save the Personator Demo from <http://www.melissadata.com/personator.htm>.
2. Run the downloaded file to install the demo version.
3. Once it is installed, run Personator.
4. Go to **Help | Activate Personator**.
5. Enter the activation code that was provided in the e-mail sent to you (use cut and paste to save some tedious typing).

1.5 File Requirements

Personator processes tables in .DBF format (dBASE III+/IV, FoxPro), Access, Excel, Oracle, SQL Server, DB2 and ASCII fixed field.

If you haven't purchased these add-ons, you can still process these formats (as well as others not listed here) through Open Database Connectivity (ODBC). Direct processing is usually recommended for large runs, as it is considerably faster than ODBC.

Visual FoxPro databases can be processed directly by Personator. However, do not use Personator to modify the structure of a Visual FoxPro database. The additional header information (structure indexes, catalogs, etc.) will be stripped.

Personator can process dBASE as FoxPro tables containing memo fields. However, it cannot process memo fields themselves. Additionally, you should never try to modify the structure of a database containing memo fields. Also, don't use Personator's utilities to sort, copy, append from or pack records in databases containing memo fields.

1.5.1 ODBC

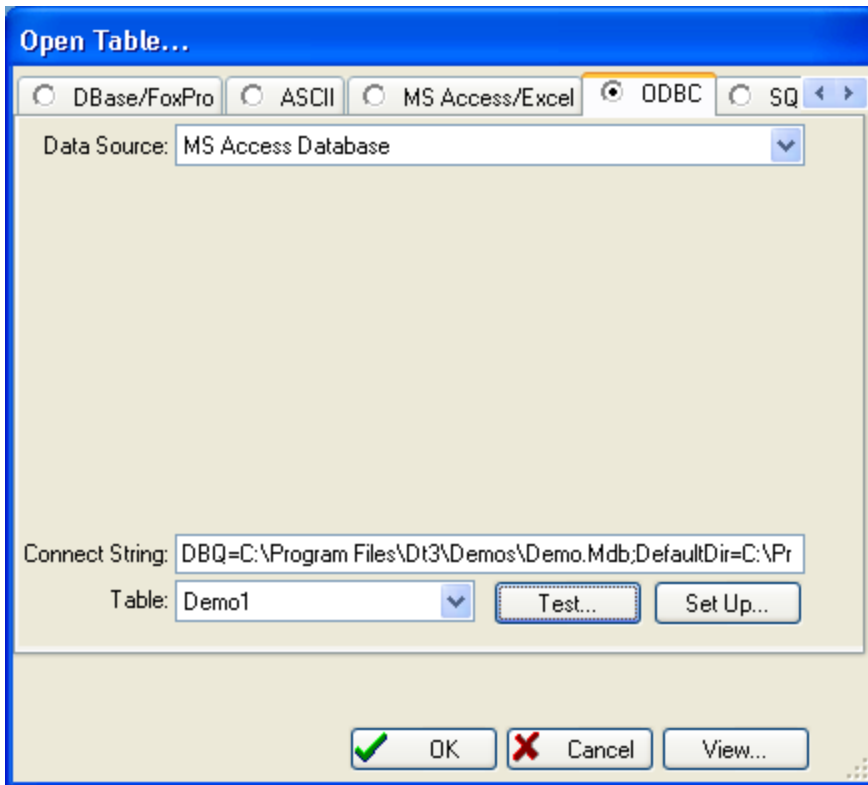
ODBC is a database-neutral interface. That means an application like Personator can access a table through ODBC without any knowledge of the table's method of data storage, location of data, or knowledge of how the data access is being done. For developers, ODBC functions as a 'Rosetta stone' that translates a table's contents into a universal format.

With ODBC, we can process tables that we would otherwise be unable to access. This ability comes at a cost, however. Read operations (building keys) typically take 10% longer to perform. Write operations (updating status fields, and scattering) can take between 20% and 50% longer. With such a decrease in performance, one may wonder why we use ODBC. There are three reasons:

1. The alternative, accessing the data directly, is often difficult or impossible, as the internal workings of many databases are proprietary.
2. Changes made to a database format by its vendor make maintaining custom database drivers difficult.
3. Using a vendor's ODBC driver is a (nearly) guaranteed way of ensuring that a database's integrity is maintained (particularly with multi-user databases).

How to Open an ODBC Table:

Go to **File | Open Existing Table**. Click the **ODBC** tab:



At this point, you can select a table in one of three ways.

Method 1:

1. Select the **Data Source** (depending on the data source, additional prompts may appear).
2. Answer any additional prompts appropriately.
3. Select the **Table**. The ODBC driver may ask some additional questions and there may be a small delay while the list of tables is being retrieved.

Method 2:

1. Click **Set Up**.
2. Click **File Data Source** or **Machine Data Source**.
3. Select the desired source from the list.
4. Click **Ok**. The ODBC driver may ask some additional questions and there may be a small delay while the list of tables is being retrieved.
5. Select the **Table**.

Method 3:

1. Instead of going to **File | Open Existing Table**, simply drag and drop the desired **.dsn** file onto the main window.

2. The ODBC driver may ask some additional questions and there may be a small delay while the list of tables is being retrieved.
3. Select the **Table**.

Method 2 will often work if Method 1 has difficulties connecting to a data source.

Personator's ODBC Requirements:

Not all ODBC drivers are created equal. Some provide more functionality than others. When you try to use an ODBC driver, Personator retrieves the driver's capabilities. The following capabilities must exist to read from a table:

- Conformance Level 1 or above
- SQLGetData() support
- SQLFetchScroll() support
- SQLTables() support
- Read access

If the above conditions are not met, Personator will display an appropriate message when you try to open a table with such a driver. The following conditions are required if Personator is to write to a table:

- SQLSetPos() support
- Absolute Fetching
- Write access

If these last three conditions are not met, Personator will still allow you to open a table, but you will not be allowed to write to the table. You can check these capabilities in **Help | Test ODBC Connection**.

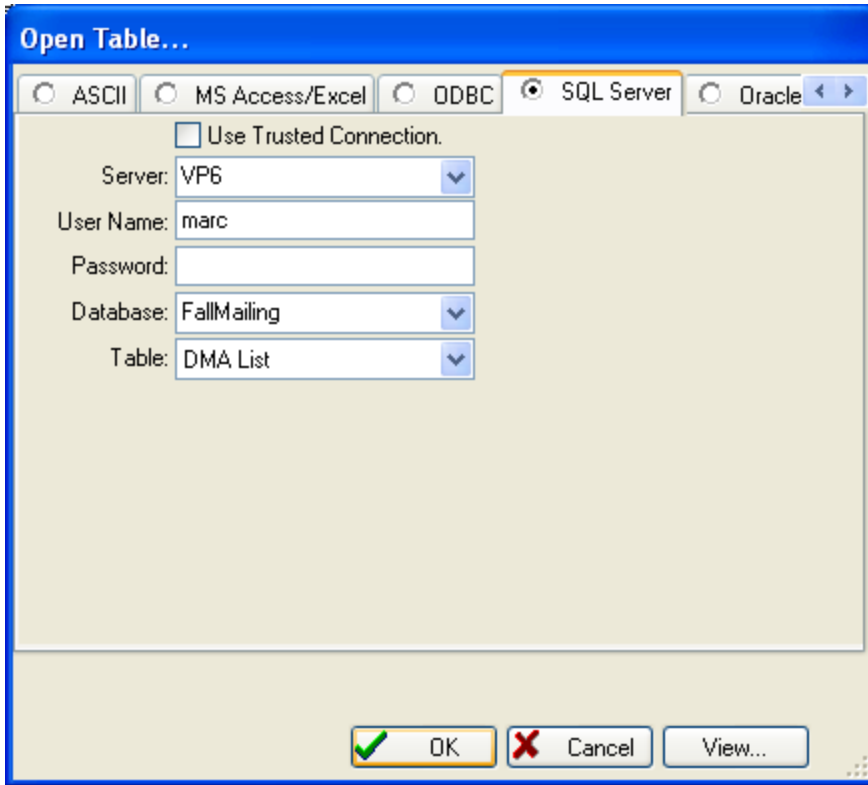
Be sure to use the most recent version of a driver (usually available on the vendor's website), as an older version often lacks capabilities or is much slower than a newer version. Often the DBMS driver vendor provides a much more complete driver than the stock Microsoft driver that comes with Windows.

1.5.2 SQL Server

SQL Server access is an optional add-on module that must be purchased separately.

How to Open a SQL Server Table:

1. Go to **File | Open Existing Table**. Click the **SQL Server** tab:



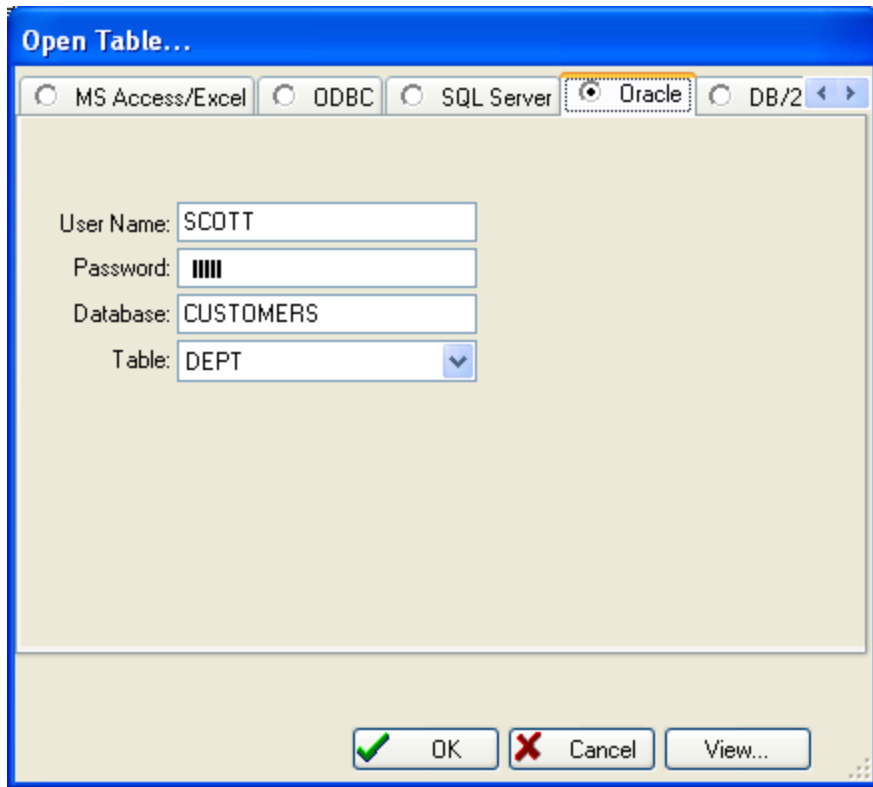
2. Check **Use Trusted Connection** if your SQL Server connection uses this technology. If unchecked, the standard login security is used (a **User Name** and **Password** must be entered).
3. Select or type the name of the **Server**.
4. Select or type the name of the **Database**.
5. Select the Table or View that you want to use. There may be a short delay while this list is being retrieved.

1.5.3 Oracle

Oracle access is an optional add-on module that must be purchased separately.

How to Open an Oracle Table:

1. Go to **File | Open Existing Table**. Click the **Oracle** tab:

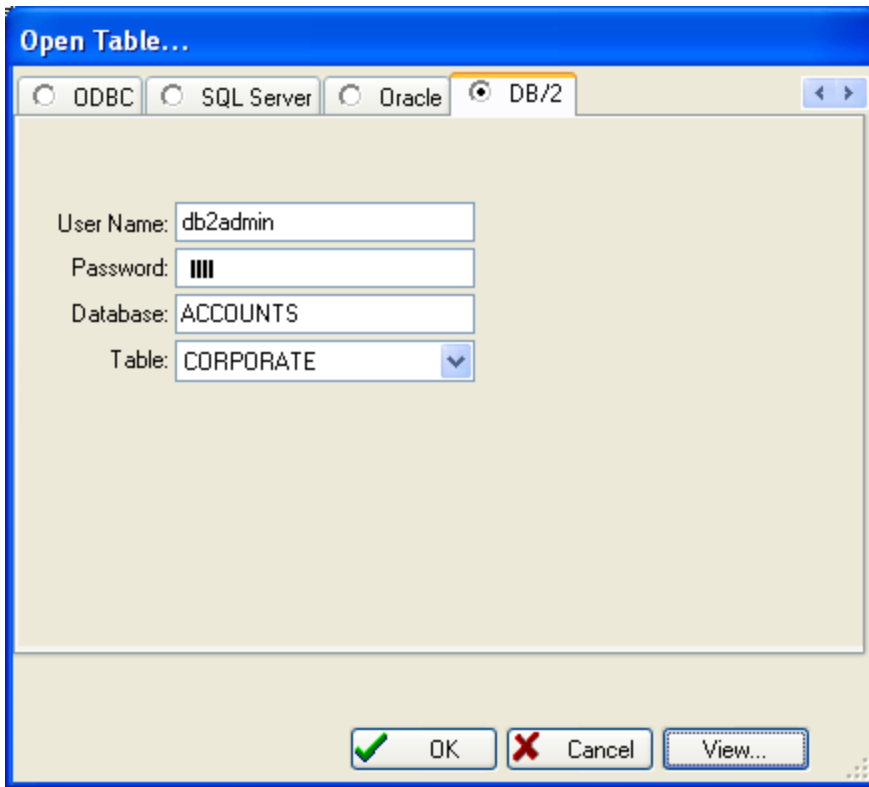


2. Enter the **User Name** and **Password**.
3. Enter the name of the **Database**
4. Select the Table or View that you want to use. There may be a short delay while this list is being retrieved.

1.5.4 DB/2

How to Open an DB/2 Table:

1. Go to **File | Open Existing Table**. Click the **DB/2** tab:

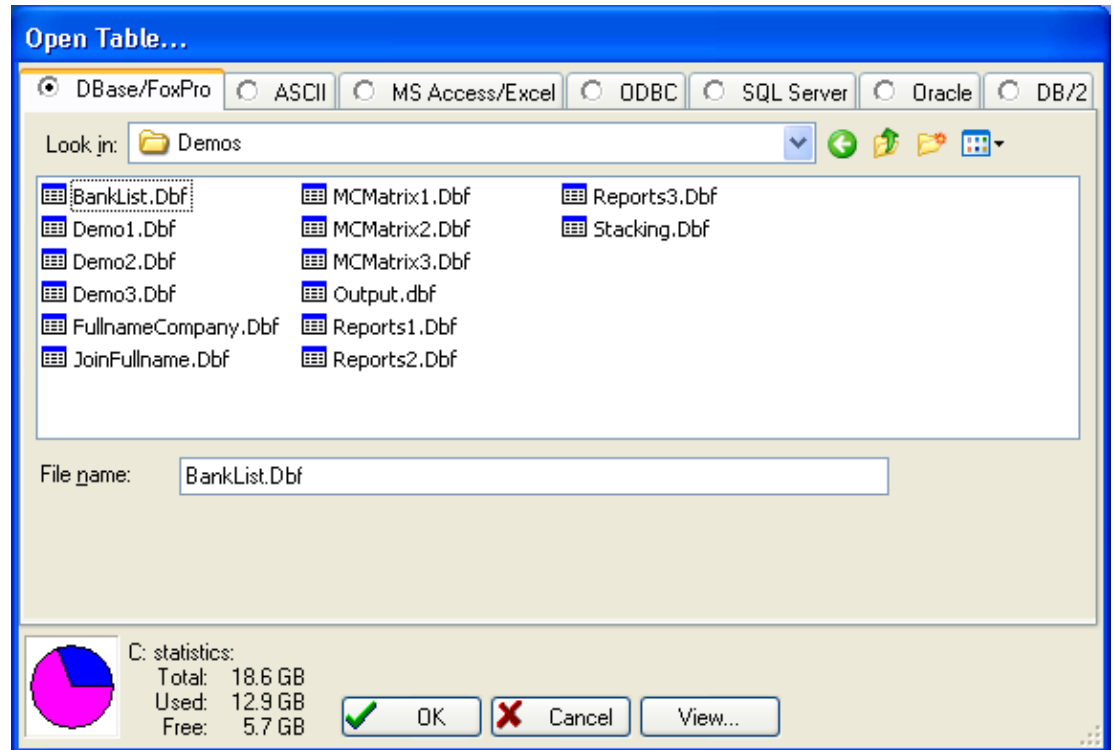


2. Enter the **User Name** and **Password**.
3. Enter the name of the **Database**
4. Select the Table or View that you want to use. There may be a short delay while this list is being retrieved.

2 File

2.1 Open Existing Table

Use **File | Open Existing Table** to open the table you want to process:



dBASE or FoxPro:

1. Click **DBase/FoxPro**.
2. Navigate to the folder containing the target database.
3. Select the database.

ASCII:

1. Click **ASCII**.
2. Navigate to the folder containing the target database.
3. Select the database.
4. You will then be guided through an ASCII Import.

MS Access or Excel:

1. Click **MS Access/Excel**.

2. Navigate to the folder containing the target database.
3. Select the database (an .mdb or .xls file).
4. Select the Table from the list. In Excel, tables are defined as either: Sheets (the series of tabs in the lower left) or Named Ranges (a cell range added to the drop-down list in the upper left).

ODBC:

See ODBC.

SQL Server:

See SQL Server.

DB/2:

See DB/2.

Once you have opened a table, you can create or open an existing setup.

For dBASE/FoxPro, ASCII, Access and Excel, you can alternately open a table by dragging and dropping the database onto Personator's main window. If necessary, you will be prompted to select a table.

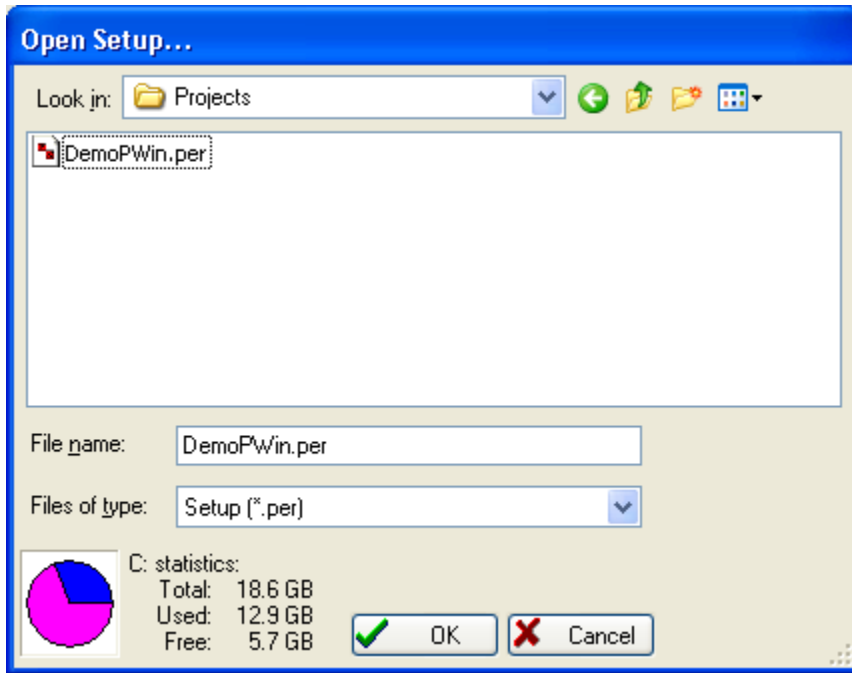
2.2 New Setup

Use **File | New Setup** to specify a process that you want to use on your table:

- Name Splitter
- Genderizer
- Salutation Maker
- Address Splitter

2.3 Open Setup

Use **File | Open Setup** to specify a process that you want to use on your table:



Once you have opened a setup, you can edit the setup and/or process the currently opened table.

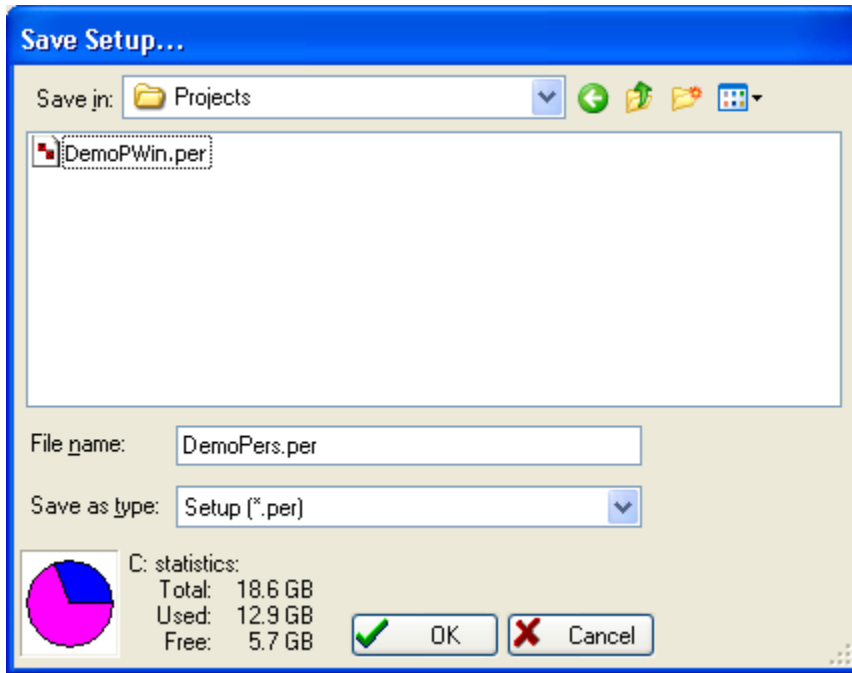
You can alternately open a setup by dragging and dropping the setup file onto Personator's main window.

2.4 Save Setup

Use **File | Save Setup** to save a setup that you have created or modified. If you have never saved this setup before, you will be prompted for a file name. You can give a setup a new name by using **Save Setup As**. The settings you save are available for future use through **Open Setup**.

2.5 Save Setup As

Use **File | Save Setup As** to save a setup with a new file name:



This allows you to slightly modify an existing setup without losing the old setup and without having to completely recreate a new setup.

2.6 Exit

Use **File | Exit** to exit Personator. If you've made changes to the setup, you will be prompted to save the changes.

3 Setup

There are four different operations that Personator can perform on a table:

Name Splitter:

Splits name fields into their components. You can specify which components go into which fields. (See Name Splitter).

Genderizer:

Personator looks up first names in a genderized first name table and adds a prefix (which you specify). (See Genderizer).

Salutation Maker:

Personator creates salutations in several different formats. You can specify in what situation a particular salutation should be used. (See Salutation Maker).

Address Splitter:

Personator splits City/State/Zip fields and parses up to three street address lines. (See Address Splitter).

3.1 Name Splitter

Setup

Name Splitter

Genderizer

Salutation Maker

Address Splitter

Name Splitter

Input:
 Name:

Mainly Contains:
 Full Names
 Inverse Names
 Gov't Inverse Names
 Mixed First Names
 Mixed Last Names

Also Contains:
 Full Names
 Inverse Names
 Gov't Inverse Names
 Mixed First Names
 Mixed Last Names

Double Name Options:
 Two Names per Field
 Handle 2nd name how?
 Remove 2nd name from Input Name field

Output Name 1:

	Size
Prefix: <input type="text" value="PREFIX1"/>	10
First: <input type="text" value="FIRST1"/>	20
Middle: <input type="text" value="MIDDLE1"/>	20
Last: <input type="text" value="LAST1"/>	20
Suffix: <input type="text" value="SUFFIX1"/>	10

Output Name 2:

	Size
Prefix: <input type="text" value="PREFIX2"/>	10
First Name: <input type="text" value="FIRST2"/>	20
Middle Name: <input type="text" value="MIDDLE2"/>	20
Last Name: <input type="text" value="LAST2"/>	20
Suffix: <input type="text" value="SUFFIX2"/>	10
Full Name: <input type="text" value="FULL2"/>	30

Splitter Options:
 Put "," before the Suffix
 Split by: Logic Delimiter (Advanced!)
 Error Code:

View Table

Field List

OK

Cancel

Help

What's in a Name?

Dr.	Anthony	John	De	Angelo	III
Prefix	First Name	Middle Name	Last Name Prefix	Last Name	Suffix

- **Prefix** Mrs., Mr., Ms., Dr., Rev., Captain, The Honorable
- **First Name** Marilyn, Lindsay, Marc, Matt, A., L., Chas., TK
- **Middle Name** Middle Names and/or initials
- **Last Name Prefix** Certain last names like "Mac Donald" or "de la Fevre" contain what we call a last name prefix. When the last name is identified, Personator looks at the word immediately to its left. If that word is in the Last Name Prefix lookup table, both parts will constitute the last name.
- **Last Name** Smith, Jones, Millard, Bernier, Stark, Bild
- **Suffix** Jr., III, PhD, LLD

3.1.1 Input

The screenshot shows a form with the following elements:

- Input:** A label followed by a text input field containing "NAME" and a dropdown arrow.
- Mainly Contains:** A column of five radio button options:
 - Full Names
 - Inverse Names
 - Gov't Inverse Names
 - Mixed First Names
 - Mixed Last Names
- Also Contains:** A column of five radio button options:
 - Full Names
 - Inverse Names
 - Gov't Inverse Names
 - Mixed First Names
 - Mixed Last Names

Input Name The name of the field you wish to split.

Mainly Contains/Also Contains Select the options that most accurately describe the data in the **Name** field. It is very important that you enter accurate information here. If the **Input** field only contains one type of name data, use the same field description for both.

Ideally, your names will be in the same format. Since this isn't a perfect world, you can specify that there might be more than one format by selecting a different format under "Also Contains". This will slow processing slightly and possibly introduce errors (for example, processing "John Wayne" as "Wayne John").

Name Types:

- **Full Names** Field holds (potentially) all name parts: prefix, first name, middle name or initials, last name, and sometimes a suffix or title. Some records may not have all these components, and that's all right.
- **Inverse Names** Same as full name except this is a last name, first name database (like "Doe, John"). In order for Personator to work correctly, the sequence of the name parts must be: last name, suffix(es) (if any), prefix(es) (if any), first name, middle name.
- **Gov't Inverse Names** Same as Inverse except the sequence is different. Normally, there are no prefixes: last name, prefix(es) (if any), first name, middle name, suffix(es) (if any).
- **Mixed First Names** In addition to the first name, some or all records may have preceding prefix(es). Some or all records may have following middle names(s) or initial(s). The first name may also have a leading initial as in "J. Edgar".
- **Mixed Last Names** In addition to the last name, some or all records may have following suffix(es) or title(s). If a suffix/title is present, a comma may or may not separate them.

3.1.2 Double Name Options

Double Name Options:

Two Names per Field Handle 2nd name how? Split it

Remove 2nd name from Input Name field

Two Names per Field Check this box if your name field sometimes contains two names (i.e., "Mr. John and Mary Smith" or "John Smith and Mary Jones", etc.). Not every record has to have two names - Personator is smart enough to know when to use the dual name splitter.

Handle 2nd Name How? What do you want Personator to do with that second name? You have four choices:

- **Move to another field** Move the entire name to a specified field. You will notice that if you choose this option, Personator will activate the "Full" box on the right side of the dialog. You must enter a field name for the second name here.
- **Split it** Split the output data into two separate sets of output fields. When you choose this option, an entire second set of output components appear on the right side of the dialog.
- **Create duplicate record** Creates a second record with the identical information, but the second name split out in place of the first name. In other words, you get two records for the price of one.
- **Ignore it** Pretend it's not even there.

Remove it from Input Name field Check this box if you want to eliminate the second name from the "Input Name" field.

Editing Dual Name Connectors:

As you may have guessed, you have complete control over the words and phrases that connect double names. All you need to know is in Tools | Lookup Tables | Dual Name Connector Table

3.1.3 Output Names 1 & 2

Output Name 1:			Output Name 2:		
		Size			Size
Prefix:	<input type="text" value="PREFIX1"/>	<input type="text" value="10"/>	Prefix:	<input type="text" value="PREFIX2"/>	<input type="text" value="10"/>
First:	<input type="text" value="FIRST1"/>	<input type="text" value="20"/>	First Name:	<input type="text" value="FIRST2"/>	<input type="text" value="20"/>
Middle:	<input type="text" value="MIDDLE1"/>	<input type="text" value="20"/>	Middle Name:	<input type="text" value="MIDDLE2"/>	<input type="text" value="20"/>
Last:	<input type="text" value="LAST1"/>	<input type="text" value="20"/>	Last Name:	<input type="text" value="LAST2"/>	<input type="text" value="20"/>
Suffix:	<input type="text" value="SUFFIX1"/>	<input type="text" value="10"/>	Suffix:	<input type="text" value="SUFFIX2"/>	<input type="text" value="10"/>
			Full Name:	<input type="text" value="Full2"/>	<input type="text" value="30"/>

Output Name 1 & 2 Enter the field names into which the various name parts should be placed.

Combination Fields:

Sometimes you will want to combine certain name parts into one field. For example, you might wish to split a Full Name field into two "combination" fields, the first holding Prefix/First Name/Middle Name, and the second holding Last Name/Suffix. To do this, enter the same field name for **Prefix**, **First** and **Middle**. Personator will put the appropriate name parts (separated by a space) in that field.

The **Handle 2nd Name How?** Option (under Double Name Options) determines which prompts are available under **Output Name 2**.

NOTE:

If you leave an entry blank, that name part will be ignored.

3.1.4 Splitter Options

Splitter Options:

Put ", " before the Suffix Split by: Logic Delimiter (**Advanced!**):

Error Code:

Put ", " before Suffix?

- **With combination LN+Suffix field** If you are placing both the last name and suffix into the same field and check this box, a comma-space will be inserted between the last name and suffix (unless one already exists). If you don't check this box, only a space will separate them.
- **With a separate Suffix field** If you check this box, Personator will place a comma-space as the first two characters of the suffix field (if a suffix/title exists in the record). If placing the comma will cause a truncation, the comma is not placed.

Split by:

- **Logic** Uses Personator's built in logic to determine how to split names.
- **Delimiter** Split names based on a delimiter you specify.

Error Code Specify the field that Personator should use to store splitting error marks.

3.2 Genderizer

Setup

Name Splitter Genderizer Salutation Maker Address Splitter

Genderizer

Input:

First Name: FIRST Contains: Only First Names
 Mixed First
 Full Names
 Inverse Names
 Gov't Names

Last Name: LAST Contains: Only Last Names
 Mixed Last

Suffix: SUFFIX Transform Suffixes (MD to Dr., Jr to Mr., etc)
 Remove transformed suffixes

Output Gender:

Prefix: PREFIX Size: 10 Contains: Only Prefixes
 Mixed First
 Full Names
 Inverse Names
 Gov't Names

Gender code
 Override existing Prefixes
 Put "," before the Suffix

Male Prefix: Mr.
Female Prefix: Ms.
Neutral Prefix:

Genderizer Options:

Precision: Aggressive Average Conservative
Population: Mostly Male Mixed Mostly Female
Table: Standard Genderbase 100 Genderbase & Correction

Error Code: <None>

View Table Field List OK Cancel Help

NOTE:

If all you want to do is genderize a file based on a combined full name field, it is not necessary to split the file first. Personator will analyze the full name field for you and place the prefix where you tell it to. On the other hand, the genderize function will run faster if the database is already split into separate prefix, first name, and last name fields.

3.2.1 Input

Input:

First Name:

Contains: Only First Names
 Mixed First
 Full Names
 Inverse Names
 Gov't Names

Last Name:

Contains: Only Last Names
 Mixed Last

Suffix:

Transform Suffixes (MD to Dr., Jr to Mr., etc)
 Remove transformed suffixes

First Name Enter the name of the field that contains the first name that you want genderized.

Contains Click on the type of data that **First Name** contains:

- **Only First Names** There are only first names or initials in this field.
- **Mixed First** In addition to the first name, some or all records may have preceding prefix(es). Some or all records may have following middle name(s) or initial(s). The first name may also have a leading initial as in "J. Edgar".
- **Full Names** Field holds (potentially) all name parts: prefix, first name, middle name or initials, last name, and sometimes a suffix or title. Some records may not have all these components, and that's okay.
- **Inverse Names** Same as full name except this is a last name, first name database (like "Doe, John"). In order for Personator to work correctly, the sequence of the name parts must be: last name, suffix(es) (if any), prefix(es) (if any), first name, middle name.
- **Gov't Names** Same as Inverse except the sequence is different. Normally, there are no prefixes: last name, prefix(es) (if any), first name, middle name, suffix(es) (if any).

Last Name (optional) Enter the name of the field that contains the last name. You may wonder why you need a last name to genderize. The answer is, you don't. However, you wouldn't want Personator to enter a prefix when neither a first name nor a last name exists. This could happen if you chose a prefix for a neutral error.

Contains Click on the type of data that **Last Name** contains:

- **Only Last Names** There are only last names in this field.
- **Mixed Last** In addition to a last name, some or all records may have following suffix(es) or title(s). If a suffix/title is present, a comma may or may not separate them.

Suffix (optional) If you would like a prefix of "Dr." for "John Smith, MD", specify the field containing the suffix here. This suffix will be used if the "Transform Suffixes" option below is checked.

Transform Suffixes (MD to Dr., Jr to Mr., etc.) If you would like a prefix of "Dr." for "John

Smith, MD", then check this box. The suffix will be taken from the suffix field, extracted from the last name field (if you've specified that it is a mixed last), or extracted from the first name field (if you've specified that it is a full name, inverse, or government inverse). In addition to doctoral suffixes, transformations are also performed for suffixes like "Jr.", "Senior", and "III" (as they indicate a male).

Remove transformed suffixes If you specified to transform suffixes (above), you can check this box to remove the transformed suffix. Usually, you will want to do this if you are preparing names for envelope addressing. For example, "John Smith, PhD" gets transformed into "Dr. John Smith, PhD". The "PhD" should be removed (using this option) to obtain the desired addressing of "Dr. John Smith". Not all transformed suffixes are removed, as 'generational' indicators such as "Junior", "Sr.", and "II" remain untouched (like "Mr. Thurston Howell, III").

Editing Transformed Suffixes:

As you may have guessed, you have complete control over the suffix transformation table. All you need to know is in Tools | Lookup Tables | Suffix Table.

3.2.2 Output Gender

Output Gender: Prefix: PREFIX Size: 10

Contains: Only Prefixes
 Mixed First
 Full Names
 Inverse Names
 Gov't Names

Gender code
 Override existing Prefixes
 Put ", " before the Suffix

Male Prefix: Mr.
 Female Prefix: Ms.
 Neutral Prefix:

Prefix Enter the name of the field you want to put the prefix in. This can be an existing field with data in it, or a newly created field. If you create a new field, enter the size of the new prefix field in the **Size** box.

Contains Click on the type of name structure you would like to put your prefix in. These choices are determined to some extent by the **Input** section of the dialog. For example: if you didn't specify a last name, Personator will only offer the first two choices on this list. Your choices are:

- **Only Prefixes** The output field will contain the resultant prefix.
- **Mixed First** The output field will contain the resultant prefix joined with the first name and middle name (if any).
- **Full Names** The output field will contain a full name complete with new prefix.
- **Inverse Names** The output field will contain a full name formatted in the inverse

sequence: last name, suffix, prefix, first name, middle name.

- **Gov't Names** The output field will contain a full name formatted in the sequence: last name, prefix, first name, middle name, suffix.

Gender Code Instead of determining a name's prefix, Personator can also output a Gender Code. The difference can be shown with two examples: When using Gender Codes, "Mrs. John Smith" gets an "F" and "Dr. John Smith" gets an "M". This can give you useful demographic information but it is generally not a good way of getting addressable prefixes.

Note that when you are using Gender Codes, the Male, Female, and Neutral prefixes are forced to "M", "F", and "N", respectively. But, if you want to use some other indicators, specify them before checking this box. Indicators must be a single character.

The differences between genderizing for demographics and regular genderizing are subtle, and are best shown in the following examples:

Name	'Normal' Prefix	Gender Code
Mrs. John Smith	Mrs.	F
Dr. Mary Smith	Dr.	F
Dr. Pat Smith	Dr.	N
Dr. Smith (No first name)	Dr.	(none)
Mrs. Mary Smith, PhD.	Dr.	F

Overwrite Existing Prefixes If there is already a prefix in this field, do you want Personator to replace it? Check here for yes.

Put "," before Suffix If you have specified that the output prefix field should contain full names, inverse names, or government inverse names, then you can check this box to put a comma before suffixes. Normally, Personator will output these name types without the comma separator, even if they had one originally.

Male Prefix What do you want Personator to use as a prefix for men's names? The default is "Mr.", "M" if sexing.

Female Prefix What do you want Personator to use as a prefix for women's names? The default is "Ms.", "F" if sexing.

Neutral Prefix What do you want Personator to use as a prefix for neutral names? The default is to leave the field empty ("N" if sexing). In previous versions of Personator, we suggested that if you were mailing to a women's magazine list (for example), you may decide to use "Ms." here. With the new Precision and Population options (see Genderizer Options), you will probably want to set those options instead.

3.2.3 Genderizer Options

Genderizer Options:

Precision:	Population:	Table:
<input type="radio"/> Aggressive	<input type="radio"/> Mostly Male	<input checked="" type="radio"/> Standard
<input checked="" type="radio"/> Average	<input checked="" type="radio"/> Mixed	<input type="radio"/> Genderbase 100
<input type="radio"/> Conservative	<input type="radio"/> Mostly Female	<input type="radio"/> Genderbase & Correction

Error Code:

Precision This setting controls how you want Personator to use the First Name lookup table. When the Precision is combined with the Population setting below, Personator can make intelligent decisions about names that appear to be neutral.

- **Aggressive** Aggressively assign genders to names (but not haphazardly!).
- **Average** Assign a gender to a name using discretion.
- **Conservative** Assign a gender only if absolutely certain.

Population This setting controls the gender that Personator prefers (particularly when using an Aggressive Precision). Notice that we don't give statistical recommendations for the populations mentioned below.

- **Mostly Male** When the database's population is chiefly male.
- **Mixed** When the database's population is about split between males and females.
- **Mostly Female** When the database's population is chiefly female.

Table Determines which name lookup table Personator uses for this genderizing run:

- **Standard** The standard 10,000 name list that comes with Personator.
- **GenderBase** Our optional 100,000+ name genderizing table.
- **GenderBase with Correction** In addition to the 100,000 name list, use the correction file to fix abbreviations and typos like "Wm" and "AHRRY".

Error Code Specify the field that Personator should use to store genderizing error marks.

See [A Short Discussion on Gender](#) for more information on how **Precision** and **Population** drive genderization.

3.3 Salutation Maker

Setup

Name Splitter Genderizer Salutation Maker Address Splitter

Salutation Maker

Input:

Prefix: PREFIX **Contains:** Only Prefix
First Name: FIRST Mixed First
Last Name: LAST Full Names
Suffix: SUFFIX Inverse Names
Contains: Only Last Names
 Mixed Last

Output Salutation: **Size**

Salutation: SALUTATION 30 Override existing Salutations
Error Code: <None> Salutation Prefix: Dear
Salutation Terminator: :
Salutation Slug: Dear Customer:

Salutation Options:

- Create Informal Salutation ("Dear John:")
- Create Formal Salutation ("Dear Mr. Smith:")
- Create FN-LN Salutation ("Dear John Smith:")
- Use Neutral Slug ("Dear Customer:")
- Leave Blank

<- Click and drag these options to arrange these formats from most desirable (top) to least (bottom).

Householding

Count: COUNT Household records with counts over 1
Salutation Prefix: Dear Salutation Terminator: Family:

View Table Field List OK Cancel Help

3.3.1 Input

Input:

Prefix:	<input type="text" value="PRE1"/>	Contains:	<input checked="" type="radio"/> Only Prefix
First Name:	<input type="text" value="FN1"/>		<input type="radio"/> Mixed First
			<input type="radio"/> Full Names
			<input type="radio"/> Inverse Names
			<input type="radio"/> Gov't Names
Last Name:	<input type="text" value="LN1"/>	Contains:	<input checked="" type="radio"/> Only Last Names
Suffix:	<input type="text" value="SUF1"/>		<input type="radio"/> Mixed Last

Prefix Select the field that contains (or will contain) prefixes.

Contains Select the type of data contained in **Prefix**. Your choices are:

- **Only Prefix** The field contains only prefixes.
- **Mixed First** In addition to first name, records may have prefix(es), middle name(s) or initial(s). First name may also have a leading initial as in "J. Edgar".
- **Full Names** Field holds (potentially) all name parts: prefix, first name, middle name or initials, last name, and sometimes a suffix or title. Some records may not have all these components, and that's all right.
- **Inverse Names** Same as full name except this is a last name, first name database (like "Doe, John"). The sequence must be: last name, suffix(es) (if any), prefix(es) (if any), first name, middle name.
- **Gov't Names** Same as inverse except the sequence is different. Normally, there are no prefixes: last name, prefix(es) (if any), first name, middle name, suffix(es) (if any).

First Name Enter the name of the field containing the first name. If **Prefix** contains Full Names, Inverse Names or Gov't Names, you won't be prompted for a first name.

Last Name Enter the name of the field containing the last name.

Contains Select the type of data contained in **Last Name**.

- **Only Last Names** The field contains only last names.
- **Mixed Last** In addition to a last name, some or all records may have suffix(es) or title(s). If a suffix/title is present, a comma may or may not separate them.

Suffix If your file contains a separate suffix field, you may specify it here. If Personator comes across "MD" it will use "Dr." in the salutation. If you don't like this behavior, simply leave this entry blank.

3.3.2 Output Salutation

The screenshot shows a configuration form for 'Output Salutation'. It includes a dropdown for 'Salutation' with 'SALUTATION' selected, a 'Size' input field with '30', an unchecked checkbox for 'Override existing Salutations', a dropdown for 'Error Code' with '<None>' selected, and three text input fields for 'Salutation Prefix' (containing 'Dear'), 'Salutation Terminator' (containing ':'), and 'Salutation Slug' (containing 'Dear Customer:').

Salutation Specify the name of the field that will receive the salutation. This can be an existing field with data in it, or a newly created field. If you create a new field, enter the size of the new salutation field in the **Size** box.

Override existing Salutations If there is already a salutation in this field, do you want Personator to replace it? Check here for yes.

Salutation Prefix Enter the word or phrase you want to start your salutation. "Dear" is the default.

Salutation Terminator Enter the punctuation, word or phrase that you want your salutation to end with. The default is ":".

Neutral Slug Enter the phrase to use if Personator cannot make an appropriate salutation.

Error Code Specify the field that Personator should use to store salutation making error marks.

3.3.3 Salutation Options

The screenshot shows a configuration form for 'Salutation Options'. It features a list of five options: 'Create Informal Salutation ("Dear John:");', 'Create Formal Salutation ("Dear Mr. Smith:");', 'Create FN-LN Salutation ("Dear John Smith:");', 'Use Neutral Slug ("Dear Customer:");', and 'Leave Blank'. To the right of the list is a text instruction: '<- Click and drag these options to arrange these formats from most desirable (top) to least (bottom).'

Sometimes Personator doesn't have all of the name components it needs to build the desired salutation; or sometimes the resulting salutation would cause a truncation. This option allows you to assign priority to the salutation types. When processing a record, Personator will try to make the top option. If it cannot, it will try the second. And so on.

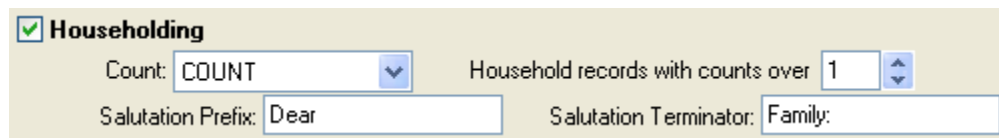
Using the mouse, you can put these options in order of preference by clicking on an option and dragging it to its desired position.

Salutation Options:

- **Create Informal Salutation** ("Dear John")
- **Create Formal Salutation** ("Dear Mr. Smith")
- **Create FN-LN Salutation** ("Dear John Smith")
- **Use Neutral Slug** ("Dear Customer")
- **Leave Blank**

Note that the bottom salutation option(s) will never be attempted during processing. For example, if the options are in the same order as pictured above, the "Leave Blank" option will never be reached because the "Use Neutral Slug" option will always succeed. You can use this to your advantage. Say you never want to create FN-LN Salutations. Simply drag that option to the very bottom.

3.3.4 Householding



Householding

Count: Household records with counts over

Salutation Prefix: Salutation Terminator:

Householding Check this box if you want a household salutation instead of an individual salutation. A household salutation looks like: salutation prefix, last name, salutation terminator. For example, "Dear Smith family:".

Count Personator does not dedupe, so you must use a previously de-duped list. MatchUp (and other merge/purge products) allow you to create a count field so that you know how many times an address appeared on a list. Enter that field name here.

Household records with counts over Personator will create a household salutation for any record that has a count field that is greater than the number you enter here. The default is "1".

Salutation Prefix Enter the word or phrase you want to use as the start to your salutation. "Dear" is the default.

Salutation Terminator Enter the punctuation, word or phrase that you want your salutation to end with. The default is "family:".

3.4 Address Splitter

Setup

Name Splitter

Genderizer

Salutation Maker

✓ Address Splitter

Address Splitter

Input:

Address Line 1:

Address Line 2:

Address Line 3:

City/State/Zip:

Country of Origin:

US only

Canada only

US & Canada

Country of origin will be determined by the **Input City/State/Zip**. If the City/State/Zip are already split, specify the field containing just the Zip/Postal Code.

Output:

	Size		Size
Address Line 1: <input type="text" value="OUT1"/> <input type="button" value="v"/>	30	Number: <input type="text" value="SNUMBER"/> <input type="button" value="v"/>	10
Address Line 2: <input type="text" value="OUT2"/> <input type="button" value="v"/>	30	Pre-Directional: <input type="text" value="SPREDIR"/> <input type="button" value="v"/>	2
Address Line 3: <input type="text" value="OUT3"/> <input type="button" value="v"/>	30	Name: <input type="text" value="SNAME"/> <input type="button" value="v"/>	40
City: <input type="text" value="CITY"/> <input type="button" value="v"/>	30	Suffix: <input type="text" value="SSUFFIX"/> <input type="button" value="v"/>	10
State: <input type="text" value="STATE"/> <input type="button" value="v"/>	2	Post-Directional: <input type="text" value="SPOSTDIR"/> <input type="button" value="v"/>	2
Zip/Postal Code: <input type="text" value="ZIP"/> <input type="button" value="v"/>	10	PO Box: <input type="text" value="POBOX"/> <input type="button" value="v"/>	20
Plus 4: <input type="text" value="ZIP"/> <input type="button" value="v"/>	4	Secondary: <input type="text" value="SECONDARY"/> <input type="button" value="v"/>	20

Splitter Options:

Error Code:

Option Set:

Address Components:

Based on the USPS specifications, street addresses can consist of up to seven parts:

- **Street Number** The house or building number. Personator's Street Smart also considers most numeric modifiers (such as "10-2") to represent the secondary number (i.e., the "2" is the equivalent of "Apt. 2"). Most alphabetic modifiers (such as "10-A" and "2 B") are seen as part of the street number.

- **Street Pre-Directional** A directional occurring before the street name. Unless directly attached to the Street Number, directionals are never assumed to be part of the Street Name (i.e. "3E" and "3-E" would be street numbers, but "3 E" would have a street number of "3" and a pre-directional of "E").
- **Street Name** Directionals can be considered the street's name in cases where a conflicting pre-directional has already been found (such as 10 North South Main Street). In cases when there are two (or more) street suffixes, all but the last suffix is considered to be part of the street name (In "789 Main Avenue Drive", the street name is "Main Avenue").
- **Street Post-Directional** A directional occurring after the street name.
- **Street Suffix** The USPS recognizes many unusual suffixes (See Utilities, Lookup Tables, Street Smart for a list). Because of the popularity of "Street", many list publishers will omit this suffix. If you have a list with lots of missing suffixes, this is probably the reason.
- **PO Box** The Post Office Box, Rural Route, Star Route, Farm Route, Highway Contract, etc.
- **Secondary** Extra addressing information like Apt., Floor, Room, etc.

Special Cases:

When in doubt, refer to the USPS's "Postal Addressing Standards" (a.k.a. "Publication 28").

3.4.1 Input

Input:

Address Line 1:	<input type="text" value="ADDRESS1"/>	<input type="button" value="v"/>	Country of Origin: <input type="radio"/> US only <input type="radio"/> Canada only <input checked="" type="radio"/> US & Canada Country of origin will be determined by the Input City/State/Zip . If the City/State/Zip are already split, specify the field containing just the Zip/Postal Code.
Address Line 2:	<input type="text" value="<None>"/>	<input type="button" value="v"/>	
Address Line 3:	<input type="text" value="<None>"/>	<input type="button" value="v"/>	
City/State/Zip:	<input type="text" value="CITYSTZIP"/>	<input type="button" value="v"/>	

Address Line 1 Primary Address Line.

Address Line 2 Secondary Address Line.

Address Line 3 Tertiary Address Line.

City/State/Zip City/State/Zip. If you are splitting mixed US/Canada street addresses, this field should be specified. If your City/State/Zip has already been split, then specify the field containing the zip.

Country of Origin Personator gives you three choices for the kind of addresses that are in your file: US Only, Canada Only, and Mixed US/Canada. Personator will use this input in some decisions. If you specify **US & Canada**, you should also specify a **City/St/Zip**, as this data will be used to determine an address's origin.

3.4.2 Output

Output:		Size		Size	
Address Line 1:	OUT1	30	Number:	SNUMBER	10
Address Line 2:	OUT2	30	Pre-Directional:	SPREDIR	2
Address Line 3:	OUT3	30	Name:	SNAME	40
City:	CITY	20	Suffix:	SSUFFIX	10
State:	STATE	2	Post-Directional:	SPOSTDIR	2
Zip/Postal Code:	ZIP	10	PO Box:	POBOX	20
Plus 4:	ZIP	4	Secondary:	SECONDARY	30

Personator reorganizes the components from the parsed address to create a more desirable address. If you are using the Address Splitter solely to parse your address information, you do not need to enter field names for the Output Address Line fields. If you are using the Address Splitter to reformat your data, you should enter field names for all or some of the following:

Address Line 1 Primary Address.

Address Line 2 Secondary Address.

Address Line 3 Tertiary Address.

The following fields will receive split City/State/Zip information:

City Full city spelling.

State If the size of the state field is 2, the two letter abbreviation will be used.

Zip/Postal Code Zip Code or (foreign) Postal Code.

Plus 4 If you would like the 5 digit Zip and the Zip+4 in the same field, specify the same name for both **Zip/Postal Code** and **Plus 4**.

The following fields are used to store parsed address information. If you do not need to access the parsed information, you don't need to enter field names:

Street Number The house or building number.

Street Pre-Directional A directional occurring before the street name.

Street Name The name of the street.

Street Post-Directional A directional occurring after the street name.

Street Suffix The street suffix.

PO Box The Post Office Box, Rural Route, Star Route, Farm Route, Highway Contract, etc.

Secondary Extra addressing information like Apt., Floor, Room, etc.

3.4.3 Splitter Options

Splitter Options:
Error Code: <None> Option Set: Custom Settings

Error Code Specify the field that Personator should use to store address splitting error marks.

Option Set:

Default Settings The Default settings are based on what we think gives the best appearance.

Custom Settings A custom set of settings that you specify by clicking **Custom Options**.

USPS Settings The USPS settings are strictly based on USPS Publications.

Optimal CASS Settings The Optimal CASS setting is based on what works well with CASS software.

The Custom Options section lists the exact differences between each option set.

Splitter Options: Custom Options

Address Splitter: Custom Options		
	Before:	After:
<input checked="" type="checkbox"/> Abbreviate Pre-Directionals	32 North Main St	32 N Main St
<input checked="" type="checkbox"/> Abbreviate Post-Directionals	32 Main St North	32 Main St N
<input checked="" type="checkbox"/> Abbreviate Suffixes	32 Main Street	32 Main St
<input checked="" type="checkbox"/> Expand Suffixes appearing in Name	32 Ave Q	32 Avenue Q
<input checked="" type="checkbox"/> Abbreviate or Expand Numerics appearing in Name:		
<input checked="" type="radio"/> Abbreviate Numerics	32 Sixteenth St	32 16th St
<input type="radio"/> Expand Numerics	32 16th St	32 Sixteenth St
<input checked="" type="checkbox"/> Standardize Number	32 1/2 Main St	32.5 Main St
<input checked="" type="checkbox"/> Standardize PO Box	POB 212	PO Box 212
<input checked="" type="checkbox"/> Standardize Secondary	3rd Floor	Fl 3
<input type="checkbox"/> Convert hyphenated Number into Secondary	10-5 Main St	10 Main St Apt 5
<input type="checkbox"/> Remove Street Address if PO Box is present	10 Main St PO Box	10 Main St

Abbreviate Pre-Directionals Before: 32 North Main St, After: 32 N Main St (*USPS recommended*).

Abbreviate Post-Directionals Before: 32 Main St North, After: 32 Main St N (*USPS recommended*).

Abbreviate Suffixes Before: 32 Main Street, After: 32 Main St

Expand Suffixes appearing in Name Before: 32 Ave B, After: 32 Avenue B (*USPS recommended*).

Abbreviate or Expand Numerics appearing in Name This setting only applies when numbers are actually part of Street Name. For example, it will not change "6 Main Street", because "6" is the Street Number. But, depending on the setting you choose, it may change "145 6th Avenue":

- **Abbreviate Numerics** Before: 32 Sixteenth St, After: 32 16th St
- **Expand Numerics** Before: 32 16th St, After: 32 Sixteenth St

Standardize Number Convert "12 1/2 Main St" to "12.50 Main St". You want to be careful because sometimes ranges of street numbers are expressed with a slash. For example, "12/14 Main Street" is a valid address even though it should have been expressed "12-14 Main Street". Personator will try to convert this to a Decimal unless you have checked "Convert hyphenated Numbers into Apts." (below).

Standardize PO Box Convert "POB 12" to "PO Box 12", "RR 1" to "RFD 1", "Star Route" to "HC", etc.

Standardize Secondary Convert "3rd Floor" to "Fl 3", "Apartment" to "Apt", "Room" to "Rm", Etc. "Floor" gets special treatment: both "1st Floor" and "Floor 1" go to "Fl 1".

Convert hyphenated Numbers into Secondary Convert "12-1 Main St" to "12 Main St Apt 1". This rule is only applied when the two numbers are more than four numbers apart. This is done so that if the Street Number represents a range of Street Numbers (12-14 Main St), the Street Splitter won't change the second number to an apartment number. In the case of ranges, the second number is dropped ("12-14" becomes "12").

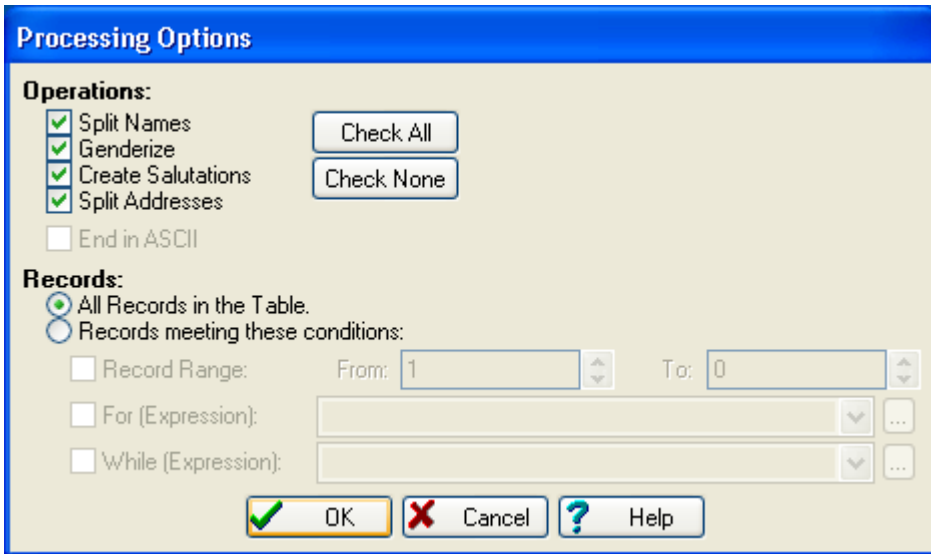
Remove Street Address if a PO Box is present Don't output 'extra' address if there is a PO Box/RFD. In other words, if you have "32 N Main St/PO Box 14", the address will become "PO Box 14".

If you choose Default, USPS, or Optimal Zip+4, Personator will use the following settings:

	Default	USPS	Optimal CASS
Abbreviate Pre-Directionals	Yes	Yes	Yes
Abbreviate Post-Directionals	Yes	Yes	Yes
Abbreviate Suffixes	Yes	Yes	Yes
Expand Suffixes appearing in Name	Yes	Yes	Yes
Abbreviate or Expand Numerics appearing in Name	Abbrev	Abbrev	Abbrev
Standardize Number	Yes	No	No
Standardize PO Box	Yes	Yes	Yes
Standardize Secondary	Yes	Yes	Yes
Convert hyphenated Numbers into Secondary	No	No	Yes
Remove Street Address if PO Box is present	No	Yes	Yes

4 Process

4.1 Processing Options



Operations Check the process(es) that you want Personator to perform:

- Split Names
- Genderize
- Create Salutations
- Split Addresses

End in ASCII Check this option if want to end in ASCII (available if you are processing an ASCII table).

Records You can process all or only part of the table:

- **All Records in the Table** To process all records.
- **Records meeting these conditions** To process only certain records:
 - **Record Range** Process records between the **From** and **To** range. To process from a specific record all the way to the end of the file, specify "0" as the **To** record.
 - **For (Expression)** Restrict processing to only records that meet the specified criteria. The For expression must be entered in dBASE syntax. You can use the Expression Builder if you need help.
 - **While (Expression)** Stop processing when records no longer meet the specified criteria. The While expression must be entered in dBASE syntax. You can use the Expression Builder if you need help.

4.2 Processing

The screenshot shows a 'Processing' dialog box with a blue title bar. It contains several sections of statistics and a progress bar. The 'Processing Statistics' section shows elapsed time, estimated time remaining, and completion time, along with total records, records processed, and records per hour. The 'Name Splitting Statistics' section shows two names and truncations. The 'Genderizing Statistics' section shows multiple first names, name not in table, misspelled first names, first name not found, and truncations, along with males, females, and neutrals. The 'Salutation Making Statistics' section shows blank or slug used and truncations. The 'Address Splitting Statistics' section shows no zip/postal code, foreign zip/postal code, incorrect zip/postal code, and unknown pattern and truncations. The 'Progress' section shows a progress bar at 92.6%. At the bottom, there is a 'Ratio: Screen Updates vs. Processing Speed' slider, an 'Analyze...' button, a 'Pause' button, and a 'Cancel' button.

Processing Statistics:			
Elapsed Time:	0:00:23.0	Total Records:	250000
Estimated Time Remaining:	0:00:01	Records Processed:	231511
Estimated Completion:	11:49:17 am	Records per Hour:	36168884

Name Splitting Statistics:			
Two Names:	0	Truncations:	19

Genderizing Statistics:			
Multiple First Names:	309	Truncations:	0
Name not in Table:	7896	Males:	26218
Misspelled First Names:		Females:	180862
First Name Not Found:	5463	Neutrals:	11124

Salutation Making Statistics:			
Blank or Slug used:	349	Truncations:	0

Address Splitting Statistics:			
No Zip/Postal Code:	0	Unknown Pattern:	0
Foreign Zip/Postal Code:	2405	Truncations:	67
Incorrect Zip/Postal Code:	336		

Progress: Total Progress
92.6%

Ratio: Screen Updates vs. Processing Speed
Updates Speed

Analyze...
Pause
Cancel

Processing Statistics:

Elapsed Time How much time has elapsed during processing.

Estimated Time Remaining Approximately how much longer processing will take.

Estimated Completion Approximately when the job will be done.

Total Records Total number of records in the table being processed.

Records Processed Number of records that have been processed.

Records per Hour Number of records processed per hour (your mileage may vary).

Name Splitting Statistics:

Two Names Number of records with dual names.

Truncations Number of records with truncations.

Genderizing Statistics:

Multiple First Names Number of records with multiple first names.

Name not in Table Number of records with a first name that could not be found in the lookup table.

Misspelled First Names Number of records with misspelled first names (only if GenderBase with spelling correction is used).

First Name Not Found Number of records with no first name.

Truncations Number of records with truncations.

Males Number of records with male first names.

Females Number of records with female first names.

Neutrals Number of records with neutral first names.

Salutation Making Statistics:

Blank or Slug Used Number of records with a blank or slug salutation.

Truncations Number of records with truncations.

Address Splitting Statistics:

No Zip/Postal Code Number of records without a Zip or Postal Code.

Foreign Zip/Postal Code Number of records having a foreign (not US or Canada) Postal Code.

Questionable Zip Code Number of records having a questionable Zip code (US records only).

Unknown Pattern Number of records without a detectable street pattern.

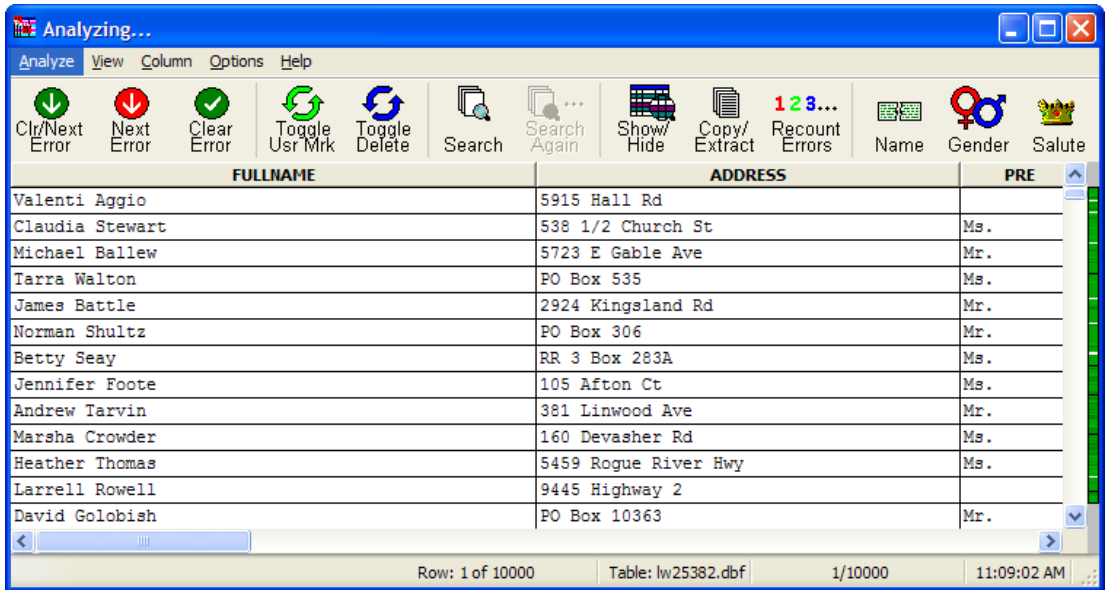
Truncations Number of records with truncations.

Ratio: Screen Updates vs. Processing Speed:

Adjust the slider to your preference. You can also adjust this setting under **Tools/User Settings/Processing/General**.

5 Analyze

Analyze gives you the chance to view and correct any errors that occurred during processing:



The Browse Window:

The center window (the browser) gives you an overall listing of the records processed. The satellite windows (Name Splitter, Genderizer, Salutation Maker and Address Splitter) give you specific information about the currently highlighted record. If you didn't select a certain process(es) when processing, that process window will not be displayed.

Editing Records:

- In the browser, double-click (or hit SPACE or ENTER) the desired field to edit. Hit TAB, ENTER or an arrow key to save changes, ESC to cancel. ENTER or TAB will keep you in a continuous editing state.
- In a satellite window, change the desired field's contents.
- In a satellite window, drag the contents of one field to another.

Colors:

The background color of a record's fields indicates what kind of error (if any) was detected during processing. The Options | Settings command lists these colors (and allows you to change them).

Analyze:

Clear & Locate Next Error Clear all errors on the current record and highlight the next record with an error.

Locate Next Error Leave errors intact on the current record and highlight the next record with an error.

Clear Record's Errors Clear all errors on the current record.

Toggle User Mark Mark (or unmark) the "User Flag" error for the current record.

Toggle Delete Mark (or unmark) the current record for deletion (dBASE files only).

Goto Record Jump to a user specified record number.

Find Record Locate a record fitting a specified criteria.

Find Again Locate the next record fitting the previously specified search criteria.

Show/Hide Records Filter the type of records (and errors) that should be displayed in the browser.

Copy/Extract Records Copy all or some records to another file, optionally removing them from the current file.

Recount Errors Recalculate the error counts.

View:

Name Splitter Toggle the Name Splitter satellite window.

Genderizer Toggle the Genderizer satellite window.

Salutation Maker Toggle the Salutation Maker satellite window.

Address Splitter Toggle the Address Splitter satellite window.

Column:

Add Column Display a new column in the browser.

Remove Column Remove an existing column from the browser.

Change Column Change what data is displayed in a column.

Auto-Size Column Change the width of a column to fit the longest string.

Auto-Size All Columns Change the width of each column to fit its longest string.

All Columns This Size Change the width of each column to the size of a column.

Reset Columns Reset all column widths to their original sizes. Show/Hide settings are also reset to show all records.

Options:

Settings Modify the Analyzer's display settings.

No Toolbar Hide the browser's toolbar.

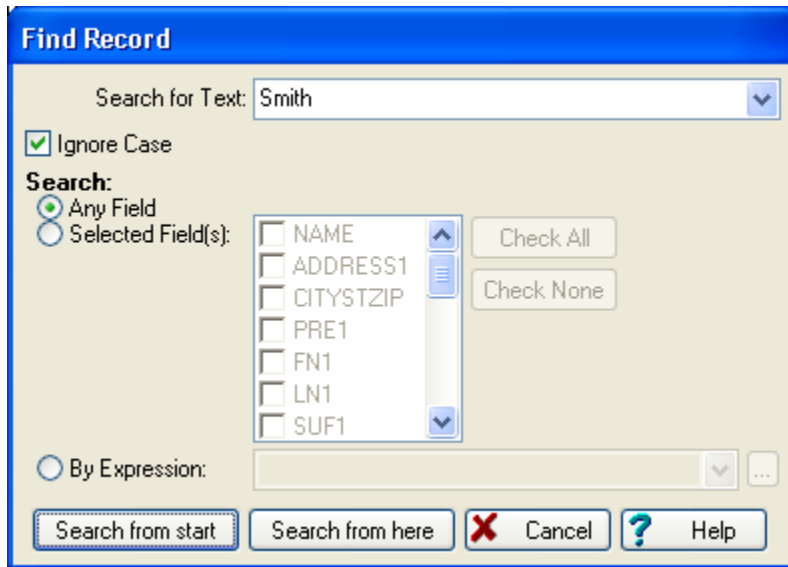
Small Toolbar Display the small toolbar.

Medium Toolbar Display the medium toolbar.

Large Toolbar Display the large toolbar.

Overview Toggle the narrow browser overview band that appears just to the right of the vertical scroll bar.

5.1 Find Record



Find Record

Search for Text:

Ignore Case

Search:

Any Field

Selected Field(s):

- NAME
- ADDRESS1
- CITYSTZIP
- PRE1
- FN1
- LN1
- SUF1

By Expression:

Search for Text The word or phrase that you want to locate.

Ignore Case Check if you want to locate the text regardless of the case.

Search Select how you would like to search:

- **Any Field** Every field will be searched for the specified text.
- **Selected Field(s)** The checked fields will be searched for the specified text.
- **By Expression** Search until a record matches the specified criteria. The For expression must be entered in dBASE syntax. You can use the Expression Builder if you need help.

Search from Start Start searching from the first record.

Search from Here Start searching from the current record.

Note:

Only rows that are currently being displayed are searched. If you have used Show/Hide to hide some of the rows, you may not find what you're looking for.

5.2 Show/Hide Records

Show/Hide Records

Name Splitter:

<input checked="" type="checkbox"/>	Two Name	0
<input checked="" type="checkbox"/>	Truncation	0

Genderizer:

<input checked="" type="checkbox"/>	Multiple First Name	0
<input checked="" type="checkbox"/>	No First Name	0
<input checked="" type="checkbox"/>	First Name Not Found	66
<input checked="" type="checkbox"/>	Neutral First Name	36
<input checked="" type="checkbox"/>	Misspelled First Name	0
<input checked="" type="checkbox"/>	Truncation	0

Salutation Maker:

<input type="checkbox"/>	Blank/Slug Salutation	
<input type="checkbox"/>	Truncation	

Address Splitter:

<input checked="" type="checkbox"/>	Unknown Pattern	0
<input checked="" type="checkbox"/>	No Zip/Postal Code	0
<input checked="" type="checkbox"/>	Foreign Postal Code	0
<input checked="" type="checkbox"/>	Questionable Zip Code	500
<input checked="" type="checkbox"/>	Truncation	0

Show User-Marked records 0

Show records having no errors 0

OK Cancel Help

Name Splitter:

Two Name Show records with dual names.

Truncation Show records with truncations.

Genderizer:

Multiple First Name Show records with multiple first names.

No First Name Show records with no first name.

First Name not Found Show records with a first name that could not be found in the lookup table.

Neutral First Name Show records with neutral first names.

Misspelled First Name Show records with misspelled first names (only if GenderBase with spelling correction is used).

Truncation Show records with truncations.

Salutation Maker:

Blank/Slug Salutation Show records with a blank or slug salutation.

Truncation Show records with truncations.

Address Splitter:

Unknown Pattern Show records without a detectable street pattern.

No Zip/Postal Code Show records without a Zip or Postal Code.

Foreign Postal Code Show records having a foreign (not US or Canada) Postal Code.

Questionable Zip Code Show records having an incorrect Zip code (US records only).

Truncation Show records with truncations.

Show User-Marked records Show records that have been marked with the "User Flag".

Show records having no errors Show records that don't have any errors at all.

5.3 Copy/Extract Records

Copy/Extract Records

Name Splitter:

<input checked="" type="checkbox"/>	Two Name	0
<input checked="" type="checkbox"/>	Truncation	0

Genderizer:

<input checked="" type="checkbox"/>	Multiple First Name	0
<input checked="" type="checkbox"/>	No First Name	0
<input checked="" type="checkbox"/>	First Name Not Found	66
<input checked="" type="checkbox"/>	Neutral First Name	36
<input checked="" type="checkbox"/>	Misspelled First Name	0
<input checked="" type="checkbox"/>	Truncation	0

Salutation Maker:

<input type="checkbox"/>	Blank/Slug Salutation	
<input type="checkbox"/>	Truncation	

Address Splitter:

<input checked="" type="checkbox"/>	Unknown Pattern	0
<input checked="" type="checkbox"/>	No Zip/Postal Code	0
<input checked="" type="checkbox"/>	Foreign Postal Code	0
<input checked="" type="checkbox"/>	Questionable Zip Code	500
<input checked="" type="checkbox"/>	Truncation	0

Copy User-Marked records 0
 Copy records having no errors 0
 Clear errors from copied records
 Remove copied records from table

OK Cancel Help

Name Splitter:

Two Name Copy records with dual names.

Truncation Copy records with truncations.

Genderizer:

Multiple First Name Copy records with multiple first names.

No First Name Copy records with no first name.

First Name not Found Copy records with a first name that could not be found in the lookup table.

Neutral First Name Copy records with neutral first names.

Misspelled First Name Copy records with misspelled first names (only if GenderBase with spelling correction is used).

Truncation Copy records with truncations.

Salutation Maker:

Blank/Slug Salutation Copy records with a blank or slug salutation.

Truncation Copy records with truncations.

Address Splitter:

Unknown Pattern Copy records without a detectable street pattern.

No Zip/Postal Code Copy records without a Zip or Postal Code.

Foreign Postal Code Copy records having a foreign (not US or Canada) Postal Code.

Questionable Zip Code Copy records having an incorrect Zip code (US records only).

Truncation Copy records with truncations.

Copy User-Marked records Copy records that have been marked with the "User Flag".

Copy records having no errors Copy records that don't have any error at all.

Clear errors from copied records Any of the error conditions checked above will be removed from the records.

Remove copied records from table Copied records will be marked for deletion. After copying, you will be asked if you want to permanently remove (pack) these records. This option is only available for dBASE files.

5.4 Recount Records

Why would you ever need to do this? Normally, Personator does a pretty good job of keeping error counts up to snuff.

If you've done some File Control options that modified some records' error codes (or deleted some records).

Since error counts are stored in the setup (.per) file, you can load one database, and the counts for an entirely different database. If your counts look suspicious, then this option can straighten things out.

Recount Errors	
Name Splitter:	
Two Names	0
Truncation	0
Genderizer:	
Multiple First Names	0
No First Name	0
First Name Not Found	66
Neutral First Name	36
Misspelled First Name	0
Truncation	0
Male	258
Female	140
Neutral	36
Salutation Maker:	
Blank/Slug Salutation	
Truncation	
Address Splitter:	
Unknown Pattern	0
No Zip/Postal Code	0
Foreign Postal Code	0
Questionable Zip Code	500
Truncation	0
Other:	
User-Marked Records	0
Records having no errors	0
100.0%	

Name Splitter:

Two Name Number of records with dual names.

Truncation Number of records with truncations.

Genderizer:

Multiple First Name Number of records with multiple first names.

No First Name Number of records with no first name.

First Name not Found Number of records with a first name that could not be found in the lookup table.

Neutral First Name Number of records with neutral first names.

Misspelled First Name Number of records with misspelled first names (only if GenderBase with spelling correction is used).

Truncation Number of records with truncations.

Salutation Maker:

Blank/Slug Salutation Number of records with a blank or slug salutation.

Truncation Number of records with truncations.

Address Splitter:

Unknown Pattern Number of records without a detectable street pattern.

No Zip/Postal Code Number of records without a Zip or Postal Code.

Foreign Postal Code Number of records having a foreign (not US or Canada) Postal Code.

Questionable Zip Code Number of records having an incorrect Zip code (US records only).

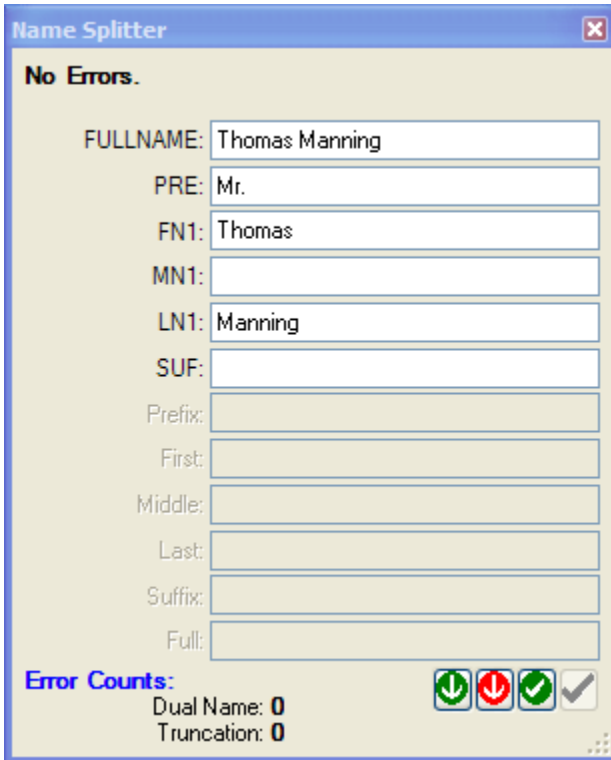
Truncation Number of records with truncations.

User-Marked records Number of records that have been marked with the "User Flag".

Records having no errors Number of records that don't have any error at all.

5.5 Name Splitter

The Name satellite window shows the Name Splitter results for the currently selected record. This view also displays the number of errors and their types for the current database. You can also use this view to edit the record and scan the list for errors.



Name Splitter

No Errors.

FULLNAME: Thomas Manning

PRE: Mr.

FN1: Thomas

MN1:

LN1: Manning

SUF:

Prefix:

First:

Middle:

Last:

Suffix:

Full:

Error Counts:

Dual Name: 0

Truncation: 0

Four action buttons: a green down arrow, a red down arrow, a green checkmark, and a grey checkmark.

The three buttons at the bottom allow you to mark the error as cleared and scan for the next error.



This button clears the error from the current record and selects the next record with a Name Splitter error.



This button selects the next record with a Name Splitter error.



This button clears the error from the current record.

5.6 Genderizer

The Gender satellite window shows the Genderizer results for the currently selected record. This view also displays the number of errors and their types for the current database. You can also use this view to edit the record and scan the list for errors.

The screenshot shows a window titled "Genderizer" with a close button in the top right. The main text reads "Genderizer: First Name not in Table." Below this are four input fields: "FN1:" containing "Domenika" (highlighted in green), "LN1:" containing "Picinic", "SUF:" (empty), and "PRE:" (empty with a dropdown arrow). Below the fields are two sections: "Error Counts:" and "Statistics:". The "Error Counts:" section lists: Multiple First Names: 0, No First Name: 64, First Name not Found: 660, Neutral First Name: 475, Misspelled First Name: 0, and Truncation: 0. The "Statistics:" section lists: Male: 7496, Female: 1305, and Neutral: 475. At the bottom right of the statistics section are four icons: a green circle with a white downward arrow, a red circle with a white downward arrow, a green circle with a white checkmark, and a white checkmark icon.

The three buttons at the bottom allow you to mark the error as cleared and scan for the next error.



This button clears the error from the current record and selects the next record with a Genderizer error.



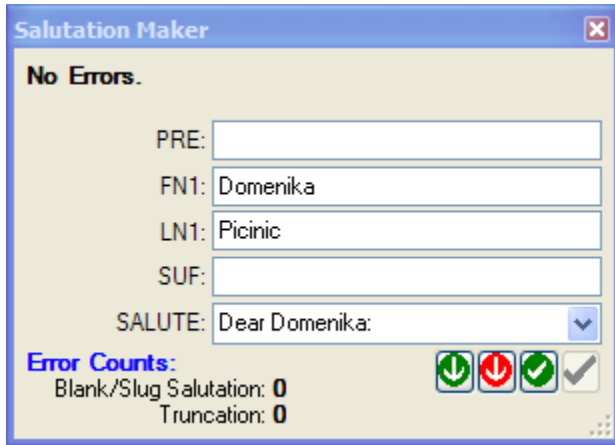
This button selects the next record with a Genderizer error.



This button clears the error from the current record.

5.7 Salutation Maker

The Salutation satellite window shows the Salutation Maker results for the currently selected record. This view also displays the number of errors and their types for the current database. You can also use this view to edit the record and scan the list for errors.



The screenshot shows a window titled "Salutation Maker" with a close button (X) in the top right corner. The main area displays "No Errors." Below this are several input fields: "PRE:" (empty), "FN1: Domenika", "LN1: Picinic", and "SUF:" (empty). Below these is a dropdown menu for "SALUTE:" with the text "Dear Domenika:" and a downward arrow. At the bottom left, under "Error Counts:", it shows "Blank/Slug Salutation: 0" and "Truncation: 0". To the right of the error counts are four icons: a green circle with a white downward arrow, a red circle with a white downward arrow, a green circle with a white checkmark, and a grey checkmark icon.

The three buttons at the bottom allow you to mark the error as cleared and scan for the next error.



This button clears the error from the current record and selects the next record with a Salutation Maker error.



This button selects the next record with a Salutation Maker error.



This button clears the error from the current record.

5.8 Address Splitter

Address Splitter ✕

Address Splitter: Unknown Pattern.

ADDRESS:

Address Line 2:

Address Line 3:

City/State/Zip:

ADD1:

ADD2:

ADD3:

City:

State:

Zip5: Plus 4:

NUMBER:

PREDIR:

NAME:

SUFFIX:

POSTDIR:

POBOX:

SECONDARY:

Error Counts:

Unknown Pattern: **15**

No Zip/Postal Code: **0**

Foreign Postal Code: **0**

Questionable Zip Code: **0**

Truncation: **10**

The three buttons at the bottom allow you to mark the error as cleared and scan for the next error.



This button clears the error from the current record and selects the next record with an Address Splitter error.



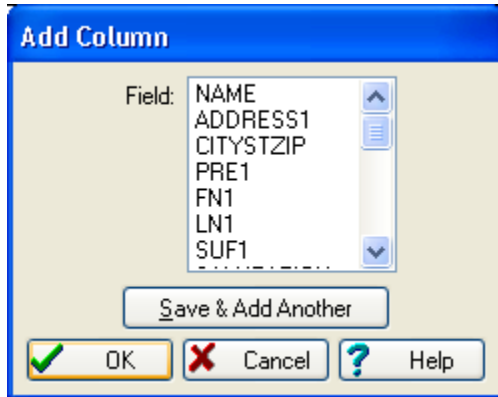
This button selects the next record with an Address Splitter error.



This button clears the error from the current record.

5.9 Add Column

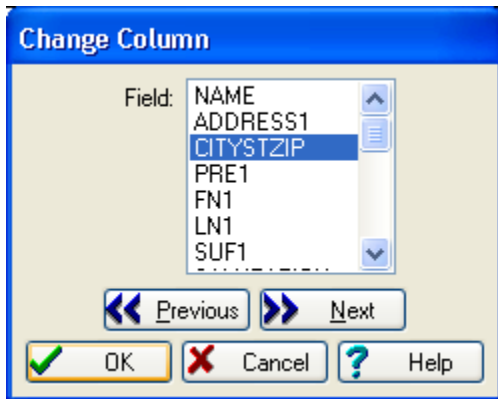
A column will be added to the browser at the highlighted column position. Its contents will be what you specify below:



Field Displays the contents of an existing field.

Save & Add Another Allows you to add another column without returning to the browser.

5.10 Change Column



Field Displays the contents of an existing field.

Previous Change the next column to the left (without having to return to the browser).

Next Change the next column to the right (without having to return to the browser).

5.11 Settings

Analyzer Settings

Display Font: Size:

	Foreground	Background	Sample
Name Split Dual Name Errors:	<input type="text" value="Black"/>	<input type="text" value="Gold"/>	<input type="text" value="Sample"/>
Genderize Multiple First Name Errors:	<input type="text" value="Black"/>	<input type="text" value="Bright Green"/>	<input type="text" value="Sample"/>
Genderize No First Name Errors:	<input type="text" value="Light Yellow"/>	<input type="text" value="Other"/>	<input type="text" value="Sample"/>
Genderize First Name Not Found Errors:	<input type="text" value="Light Yellow"/>	<input type="text" value="Other"/>	<input type="text" value="Sample"/>
Genderize Neutral First Name Errors:	<input type="text" value="Light Yellow"/>	<input type="text" value="Other"/>	<input type="text" value="Sample"/>
Genderize Misspelled First Name Errors:	<input type="text" value="Light Yellow"/>	<input type="text" value="Other"/>	<input type="text" value="Sample"/>
Salutation Maker Bad Salutation Errors:	<input type="text" value="Light Yellow"/>	<input type="text" value="Other"/>	<input type="text" value="Sample"/>
Address Split Unknown Pattern Errors:	<input type="text" value="Black"/>	<input type="text" value="Other"/>	<input type="text" value="Sample"/>
Address Split No Zip/Postal Code Errors:	<input type="text" value="Black"/>	<input type="text" value="Other"/>	<input type="text" value="Sample"/>
Address Split Foreign Postal Code Errors:	<input type="text" value="Black"/>	<input type="text" value="Other"/>	<input type="text" value="Sample"/>
Address Split Questionable Zip Code	<input type="text" value="Black"/>	<input type="text" value="Other"/>	<input type="text" value="Sample"/>
Truncation Errors:	<input type="text" value="White"/>	<input type="text" value="Red"/>	<input type="text" value="Sample"/>
User-Marked Records:	<input type="text" value="Black"/>	<input type="text" value="Other"/>	<input type="text" value="Sample"/>

When editing...

ENTER moves to the next field to the right
 ENTER moves to the next row down

When not editing, at the rightmost column...

TAB moves to the leftmost column, one row down
 TAB moves to the leftmost column, same row

Display Font/Size The browser's font.

Colors The list of color entries allow you to customize the look of the Analyze browser. You can change the foreground (text) and background colors.

When editing... Control the behavior of the ENTER key:

- **ENTER moves to the next field to the right** When editing a field, the ENTER key will

move the cursor to the next field to the right.

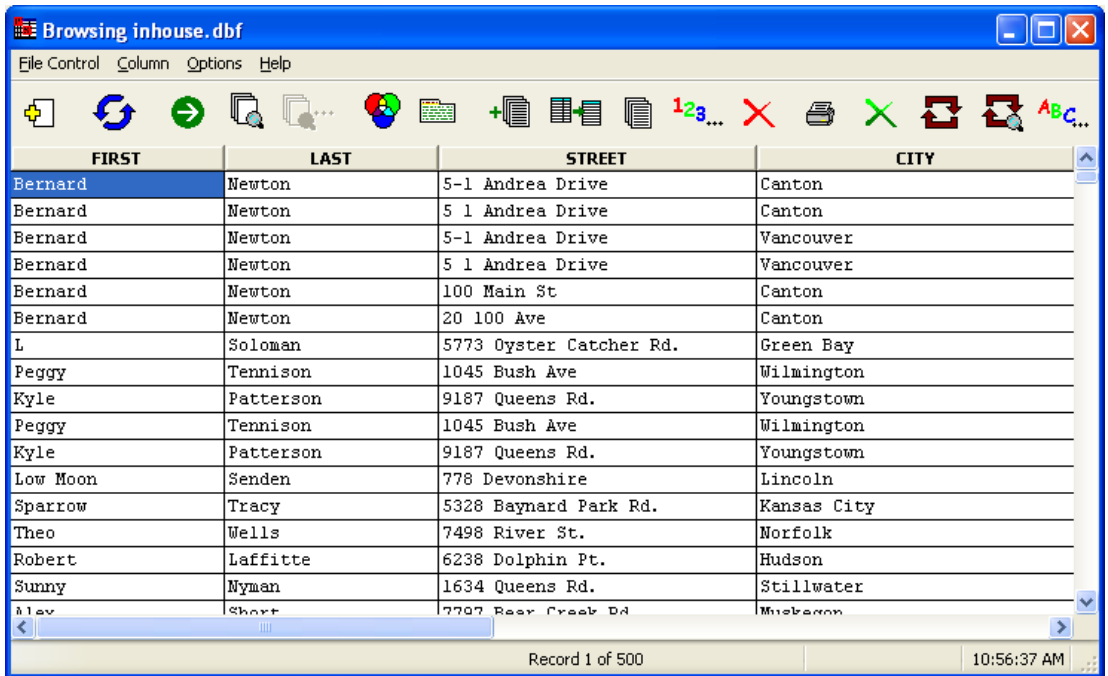
- **ENTER moves to the next row down** When editing a field, the ENTER key will move the cursor to the same field, next row down.

When not editing, at the rightmost column... Control the behavior of the TAB key:

- **TAB moves to the leftmost column, one row down** When in the rightmost column, the TAB key will move the cursor one row down and circle to the first column.
- **TAB moves to the leftmost column, same row** When in the rightmost column, the cursor will circle back to the first column of the same row.

6 Tools

6.1 Browse



FIRST	LAST	STREET	CITY
Bernard	Newton	5-1 Andrea Drive	Canton
Bernard	Newton	5 1 Andrea Drive	Canton
Bernard	Newton	5-1 Andrea Drive	Vancouver
Bernard	Newton	5 1 Andrea Drive	Vancouver
Bernard	Newton	100 Main St	Canton
Bernard	Newton	20 100 Ave	Canton
L	Soloman	5773 Oyster Catcher Rd.	Green Bay
Peggy	Tennison	1045 Bush Ave	Wilmington
Kyle	Patterson	9187 Queens Rd.	Youngstown
Peggy	Tennison	1045 Bush Ave	Wilmington
Kyle	Patterson	9187 Queens Rd.	Youngstown
Low Moon	Senden	778 Devonshire	Lincoln
Sparrow	Tracy	5328 Baynard Park Rd.	Kansas City
Theo	Wells	7498 River St.	Norfolk
Robert	Laffitte	6238 Dolphin Pt.	Hudson
Sunny	Nyman	1634 Queens Rd.	Stillwater
Alex	Short	7707 Bear Creek Rd	Waubesaun

Tools | Browse allows you to view and modify a table's contents. Each row of the table represents one record.

Depending on the type of table you are browsing, you may or may not be allowed to edit its contents. If Personator cannot allow you to edit records, you will be warned when the browser window is first displayed.

Many of the Browse commands use a dBASE expression in one way or another. Even if your table is not a dBASE formatted table (i.e. Access, Excel, ASCII, etc), a dBASE expression should be used. Personator "corrects" the statement appropriately.


Keyboard Shortcuts:

LEFT, RIGHT	Move the highlight left/right one column.
CTRL+LEFT, CTRL+RIGHT	Pan the browser left/right one column.
HOME, END	Move the highlight to the first/last column.
UP, DOWN	Move the highlight up/down one row.
CTRL+UP, CTRL+DOWN	Pan the browser up/down one row.
CTRL+HOME, CTRL+END	Move the highlight to the first/last row.
PAGEUP, PAGEDOWN	Move the highlight up/down one screen.
CTRL+PAGEUP,CTRL+PAGEDOWN	Pan the browser up/down one screen.

Editing Records:

In the browser, double-click (or hit SPACE or ENTER) the desired field to edit. Hit TAB, ENTER or an arrow key to save changes, ESC to cancel. ENTER or TAB will keep you in a continuous editing state (see [Options | Settings](#) to modify this behavior).

Resizing a Column:

Move the pointer between the gray column headings until it becomes a , then drag the column's edge to the desired size.

Moving a Column:

Click the column's gray heading area, then drag it to a new location.

Changing what a Column Displays:

You can change what data is displayed in a column by double-clicking its gray heading area. You will then have the option to display a specific field or the result of a dBASE expression (see [Column | Change Column](#)). Note that the same field can appear multiple times.

Adding Records:

Select [File Control | New Record](#) or hit CTRL+N. You don't have to be at the bottom of the table to add records (but the record *will always* be added to the end). This option is not available for all database types.

Deleting Records:

To mark (or unmark) a dBASE record for deletion, either select [File Control | Toggle Delete](#) or hit CTRL+T. Records marked for deletion can be permanently removed with [File Control | Pack Table](#).

File Control:

New Record Add a new empty record to the end of the table (dBASE files only).

Toggle Delete Mark (or unmark) the current record for deletion (dBASE files only).

Goto Record Jump to a user specified record number.

Find Record Locate a record fitting a specified criteria.

Find Again Locate the next record fitting the previously specified search criteria.

Set Filter View only records that meet a specified criteria.

Set Index View records in a specified sequence.
Append Records Add records from one table into the current table.
Concatenate Fields Join up to eight fields into a single field.
Copy Records Copy records fitting a specified criteria to a new file.
Count Records Count the number of records that meet a specified criteria.
Delete Records Mark for deletion records that meet a specified criteria.
Print Records Print records fitting a specified criteria.
Recall Records Unmark for deletion records that meet a specified criteria.
Replace/With Replace the contents of a field with the result of a specified expression.
Search & Replace Search for text and replace it with something else.
Sort Records Sort the table by a specified criteria (dBASE files only).
Pack Table Physically and permanently remove records that have been marked for deletion (dBASE files only).
Split Table Split the table in a variety of ways.
Vertical Display Display the columns of the currently highlighted record in a vertical window.

Column:

Add Column Display a new column in the browser.
Remove Column Remove an existing column from the browser.
Change Column Change what data is displayed in a column.
Auto-Size Column Change the width of a column to fit the longest string.
Auto-Size All Columns Change the width of each column to fit its longest string.
All Columns This Size Change the width of each column to the size of a column.
Reset Columns Reset all column widths to their original sizes. Filter and Index settings are also reset.

Options:

Settings Modify the browser's display settings.
No Toolbar Hide the browser's toolbar.
Small Toolbar Display the small toolbar.
Medium Toolbar Display the medium toolbar.
Large Toolbar Display the large toolbar.

6.1.1 Find Record

Find Record

Search for:

Ignore Case

Search:

Any Field

Selected Field(s):

- NAME
- STREET
- CITYSTZIP
- LASTCALL
- AGE
- SALARY

By Expression:

Search for Text The word or phrase that you want to locate.

Ignore Case Check if you want to locate the text regardless of the case.

Search Select how you would like to search:

- **Any Field** Every field will be searched for the specified text.
- **Selected Field(s)** The checked fields will be searched for the specified text.
- **By Expression** Search until a record matches the specified criteria. The For expression must be entered in dBASE syntax. You can use the Expression Builder if you need help.

Search from Start Start searching from the first record.

Search from Here Start searching from the current record.

Note:

Only rows that are currently being displayed are searched. If you have used Set Filter to hide some of the rows, you may not find what you're looking for.

6.1.2 Set Filter



Allows you to view records that meet certain criteria. A filter works just like a "for" condition except that it remains active until you either change or remove the filter. If you Copy, Sort, etc. once a filter has been set, the program will perform those actions only on the records that meet your filter criteria. You'll notice that subsequent File Control options will have the current filter condition listed in the "for" condition box. When a filter is set, the Set Filter tool will have a check next to its icon on the toolbar:



Show All Records (no filter) Removes the current filter.

Filter by Expression Sets the filter to the expression specified to the right. The filter expression must be entered in dBASE syntax. You can use the Expression Builder if you need help.

Use currently activated index If an index has been set, you can check this box to keep that index in effect. If not checked, the index will be reset to the table's natural order.

Display Filtered Records In what manner filtered records should be shown:

- **Don't Display Filtered Records** When browsing, only records meeting the filter expression will be displayed.
- **Show Filtered Records in an Alternate Color** When browsing, records not meeting the filter expression will be displayed in the selected color.

6.1.3 Set Index

Set Index

Index Records:

'Natural' Order (no index).

Index by Field(s):

First by:	Second by:	Third by:	Fourth by:
<None>	<None>	<None>	<None>
NAME	NAME	NAME	NAME
STREET	STREET	STREET	STREET
CITYSTZIP	CITYSTZIP	CITYSTZIP	CITYSTZIP
LASTCALL	LASTCALL	LASTCALL	LASTCALL
AGE	AGE	AGE	AGE
SALARY	SALARY	SALARY	SALARY

Index by Expression:

Order:

Ascending

Descending

Use currently activated filter

Allows you to view records in a certain sequence. This only effects the order that records are displayed and not the physical record order. If you want to change the physical order of a table, use **File Control | Sort Records**. When an index is set, the Set Index tool will have a check next to its icon on the toolbar:



Index Records How you would like to order the records:

- **'Natural' Order (no index)** Removes the active index.
- **Index by Field(s)** Indexes by the field(s) you select.
- **Index by Expression** Indexes the file according to the expression specified to the right. The index expression must be entered in dBASE syntax. You can use the Expression Builder if you need help.

Order Sequencing order:

- **Ascending** "A" before "B", "1" before "2", "03/10/68" before "04/10/68".
- **Descending** "C" before "B", "3" before "2", "05/10/68" before "04/10/68".

Use currently activated index If a filter has been set, you can check this box to keep that filter in effect. If not checked, the filter will be reset to show all records.

6.1.4 Append Records

Append records from another table onto the end of the current table. This option is not available for all table types.

When you first select this option, you are prompted for an input table. Once you have selected an input table, you will see the Append Records dialog:



The image shows a dialog box titled "Append Records" with a blue header. Below the title, the text "Append Records:" is followed by two red notes. The first note states: "Note: Field names and field lengths should match between the two files." The second note states: "Note: The settings below apply to the *Input Table*, not the table currently being browsed. This is unlike any of the other File Control functions." Below the notes, there are two radio buttons. The first is selected and labeled "All Records in the Table." The second is labeled "Records meeting these conditions:" and is followed by three options, each with a checkbox: "Record Range:" with "From:" and "To:" spinners (values 1 and 0 respectively); "For (Expression):" with a text field and a dropdown arrow; and "While (Expression):" with a text field and a dropdown arrow. At the bottom of the dialog are three buttons: "OK" with a green checkmark, "Cancel" with a red X, and "Help" with a blue question mark.

Note: Unlike any other File Control tool, the Record Range settings apply to the *input table*, not the current table.

Note: Field names and lengths should match between the two tables. Data in fields from the input table that don't have a matching field (ie, a field with the same name) in the current table *will not* be added.

All Records in the Table All records in the input table will be appended.

Records meeting these conditions Only append records meeting the conditions:

- **Record Range** Append records between the **From** and **To** range. To process from a specific record all the way to the end of the file, specify "0" as the **To** record.
- **For (Expression)** Restrict appending to only records that meet the specified criteria. The **For** expression must be entered in dBASE syntax. You can use the Expression Builder if you need help.

- **While (Expression)** Stop appending when records no longer meet the specified criteria. The **While** expression must be entered in dBASE syntax. You can use the Expression Builder if you need help.

6.1.5 Concatenate Fields

'Concatenate' is just a fancy word for 'join'. It makes us feel superior when we use it.

Concatenate Fields

Input Fields:

Input Field 1: <None> Input Field 5: <None>
 Input Field 2: <None> Input Field 6: <None>
 Input Field 3: <None> Input Field 7: <None>
 Input Field 4: <None> Input Field 8: <None>

Output Fields:

Output Field: []

If data exists in the output field:

Append new data to the existing data
 Overwrite the existing data

Remove leading/trailing spaces:

Trim leading spaces
 Trim trailing spaces

Records:

All Records in the Table.
 Records meeting these conditions:

Record Range: From: 1 To: 0

For (Expression): [] ...

While (Expression): [] ...

Separate fields with:

Single space
 No separator
 This separator: []

OK Cancel Help

Input Fields Select the fields that you want to join together, in the order you want them joined.

Output Fields Select the field that will receive the joined result.

If data exists in the output field Select what should happen if there's already something in the **Output Field**:

- **Append new data to the existing data** The joined result will be tacked onto the end of the existing data.
- **Overwrite the existing data** The joined result will replace any existing data.

Separate fields with Select what should be inserted between the joined data:

- **Single space** "John" and "Smith" will become "John Smith".
- **No separator** "John" and "Smith" will become "JohnSmith".
- **This separator** "John" and "Smith" will become "John<your connector>Smith".

Remove leading/trailing spaces Select whether spaces should be trimmed:

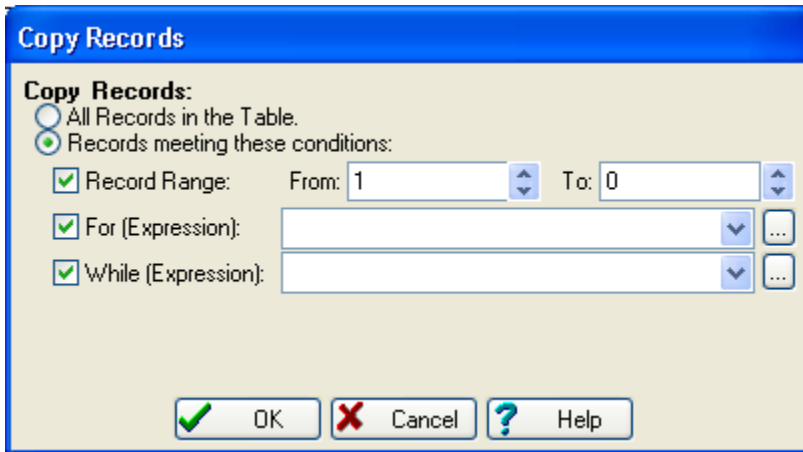
- **Trim leading spaces** Remove spaces from the beginning of the field.
- **Trim trailing spaces** Remove spaces from the end of the field.

Records You can process all or only part of the table:

- **All Records in the Table** To process all records.
- **Records meeting these conditions** To process only certain records:
 - **Record Range** Process records between the **From** and **To** range. To process from a specific record all the way to the end of the file, specify "0" as the **To** record.
 - **For (Expression)** Restrict processing to only records that meet the specified criteria. The **For** expression must be entered in dBASE syntax. You can use the Expression Builder if you need help.
 - **While (Expression)** Stop processing when records no longer meet the specified criteria. The **While** expression must be entered in dBASE syntax. You can use the Expression Builder if you need help.

6.1.6 Copy Records

Copy records fitting a specified criteria to a new table.



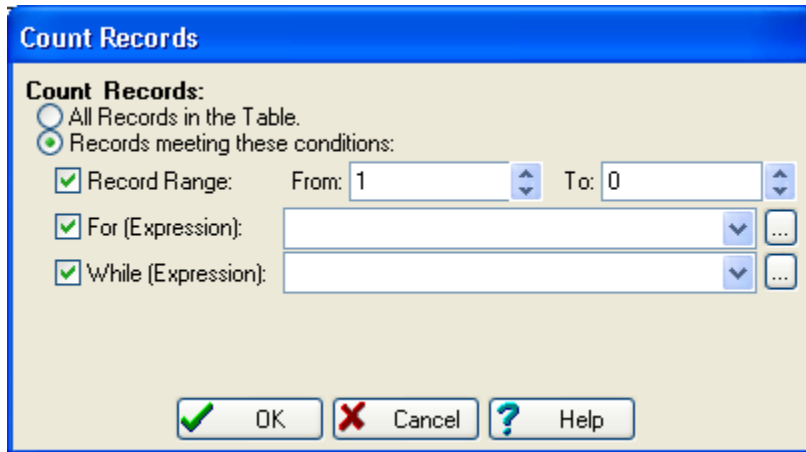
Copy Records You can copy all or only part of the table:

- **All Records in the Table** To copy all records.
- **Records meeting these conditions** To copy only certain records:
 - **Record Range** Copy records between the **From** and **To** range. To copy from a specific record all the way to the end of the file, specify "0" as the **To** record.
 - **For (Expression)** Restrict copying to only records that meet the specified criteria. The **For** expression must be entered in dBASE syntax. You can use the Expression Builder if you need help.
 - **While (Expression)** Stop copying when records no longer meet the specified criteria. The **While** expression must be entered in dBASE syntax. You can use the Expression Builder if you need help.

When you have completed this dialog and hit **OK**, you are prompted for the name of an output table.

6.1.7 Count Records

Count the number of records meeting a specified criteria.

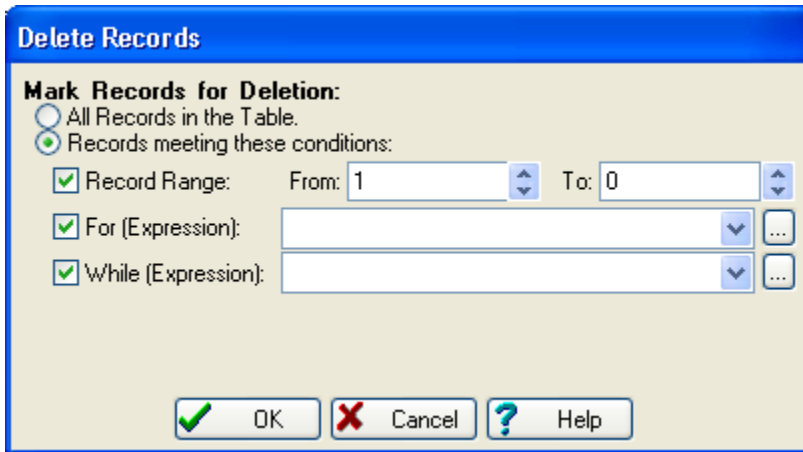


Count Records You can count all or only some of the records:

- **All Records in the Table** To count all records. Not particularly useful when counting.
- **Records meeting these conditions** To count only certain records:
 - **Record Range** Count records between the **From** and **To** range. To count from a specific record all the way to the end of the file, specify "0" as the **To** record.
 - **For (Expression)** Restrict counting to only records that meet the specified criteria. The **For** expression must be entered in dBASE syntax. You can use the Expression Builder if you need help.
 - **While (Expression)** Stop counting when records no longer meet the specified criteria. The **While** expression must be entered in dBASE syntax. You can use the Expression Builder if you need help.

6.1.8 Delete Records

Mark for deletion records meeting a specified criteria. This option is only available for dBASE files.

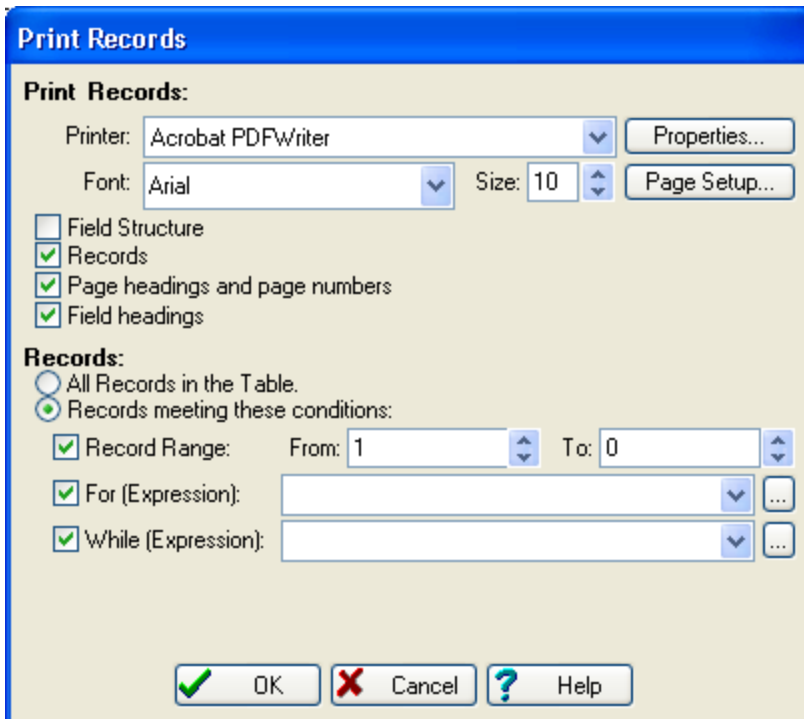


Count Records You can delete all or only some of the records:

- **All Records in the Table** To delete all records.
- **Records meeting these conditions** To delete only certain records:
 - **Record Range** Delete records between the **From** and **To** range. To count from a specific record all the way to the end of the file, specify "0" as the **To** record.
 - **For (Expression)** Restrict deleting to only records that meet the specified criteria. The **For** expression must be entered in dBASE syntax. You can use the Expression Builder if you need help.
 - **While (Expression)** Stop deleting when records no longer meet the specified criteria. The **While** expression must be entered in dBASE syntax. You can use the Expression Builder if you need help.

6.1.9 Print Records

Print records meeting a specified criteria. The printed output will match the current browser's appearance: column contents, positions, sizes, filtering and ordering.



Printer Select the printer to output to.

Font/Size The font to be used for printing.

Properties Displays the printer's **Printer Setup** dialog. You can usually change settings such as Paper Orientation, Paper Size and Print Quality. This dialog is dependant on your printer driver, so your mileage may vary.

Page Setup Displays the Windows **Page Setup** dialog. You can change the Paper Size, Orientation and Margins.

Field Structure Check this box to print the table's structure.

Records Check to print the table's contents.

Page headings and page numbers Check to print each page with a title indicating the name of the table, as well as a page number.

Field headings Check this box to print field names at the top of each page.

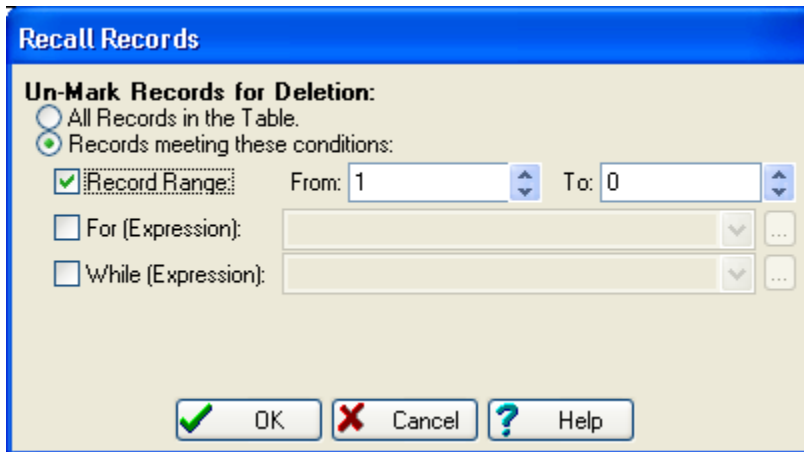
Records You can print all or only some of the records:

- **All Records in the Table** To print all records.

- **Records meeting these conditions** To print only certain records:
 - **Record Range** Print records between the **From** and **To** range. To count from a specific record all the way to the end of the file, specify "0" as the **To** record.
 - **For (Expression)** Restrict printing to only records that meet the specified criteria. The **For** expression must be entered in dBASE syntax. You can use the Expression Builder if you need help.
 - **While (Expression)** Stop printing when records no longer meet the specified criteria. The **While** expression must be entered in dBASE syntax. You can use the Expression Builder if you need help.

6.1.10 Recall Records

Remove deletion marks from records meeting a specified criteria. This option is only available for dBASE files.

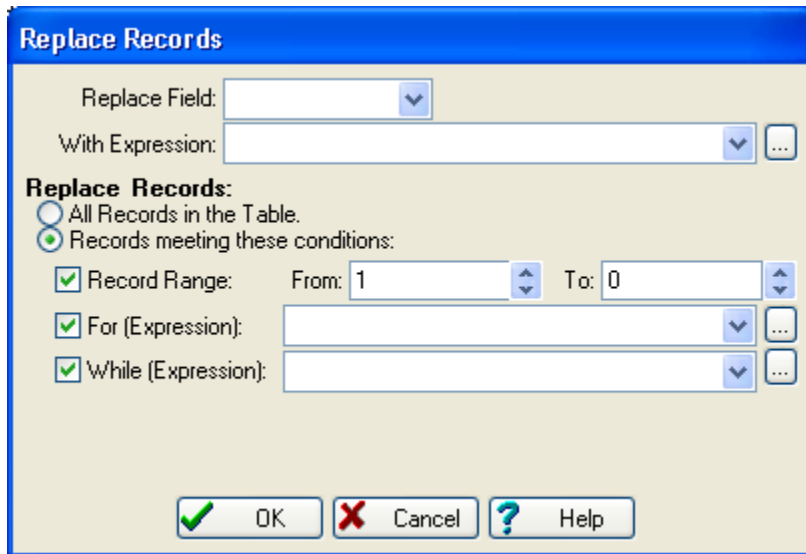


Un-Mark Records for Deletion You can unmark all or only some of the records:

- **All Records in the Table** To unmark all records.
- **Records meeting these conditions** To unmark only certain records:
 - **Record Range** Unmark records between the **From** and **To** range. To count from a specific record all the way to the end of the file, specify "0" as the **To** record.
 - **For (Expression)** Restrict unmarking to only records that meet the specified criteria. The **For** expression must be entered in dBASE syntax. You can use the Expression Builder if you need help.
 - **While (Expression)** Stop unmarking when records no longer meet the specified criteria. The **While** expression must be entered in dBASE syntax. You can use the Expression Builder if you need help.

6.1.11 Replace/With

Replace the contents of a field with the result of a specified expression.



Replace Field Select the field that will receive the result of the **With Expression**.

With Expression Specify the dBASE expression that will determine the new contents of the **Replace Field**. The contents must be of the same type of data as the **Replace Field**. For example, if the **Replace Field** is a Numeric field, then this expression must result in a number. You can use the Expression Builder if you need help.

Replace Records You can process all or only some of the records:

- **All Records in the Table** To process all records.
- **Records meeting these conditions** To process only certain records:
 - **Record Range** Process records between the **From** and **To** range. To count from a specific record all the way to the end of the file, specify "0" as the **To** record.
 - **For (Expression)** Restrict processing to only records that meet the specified criteria. The **For** expression must be entered in dBASE syntax. You can use the Expression Builder if you need help.
 - **While (Expression)** Stop processing when records no longer meet the specified criteria. The **While** expression must be entered in dBASE syntax. You can use the Expression Builder if you need help.

When you have completed this dialog and hit **OK**, you are prompted for a Processing Mode.

6.1.12 Search & Replace

Search for specific text and replace it with another.

Search & Replace

Source:

Screen
 File:

Fields:

Search & Replace all fields
Search Field: Replace Field:

Delete 'Search for' string from Search Field

Search & Replace:

Search for: Blank Field
Replace with: Blank Field

Options:

Ignore case Whole word Multiple occurrences
 Any occurrence First occurrence

Search & Replace Records:

All Records in the Table.
 Records meeting these conditions:

Record Range: From: To:

For (Expression):

While (Expression):

Source How the Search & Replace should be directed:

- **Screen** The search and replace text will be entered in the **Search for** and **Replace with** prompts.
- **File** The search and replace text will be retrieved from the specified file. This file must be a dBASE database with two character fields. The first field is used as the search text, the second as the replace text.

Search & Replace all fields Every field in the table will be searched.

Search Field The field to search.

Replace Field The field to replace into. The default is to use the **Search Field**, which is usually what you want.

Delete 'Search for' string from Search Field If you chose a **Replace Field** that is different than the **Search Field**, you can remove the **Search for** text from the original by checking this box.

Search for The text to search for. If you don't elect to ignore case, then be sure to enter the data exactly as desired. Checking **Blank Field** searches for a blank **Search Field**.

Replace with The text to replace the **Search for** text with. It will be used exactly as you enter it (i.e., it is case dependant). Checking **Blank Field** will clear the **Replace Field** when the **Search for** text is found.

Ignore Case Check if you want to search regardless of the case.

Whole word/Any occurrence If **Whole word** is selected, "IT" will **not** be found in "SMITH", "SMIT" or "ITH". In order to be considered a whole word, the search text must occur as a word or a series of words. If **Any occurrence** is selected, the text may appear anywhere in a field.

Multiple occurrences/First occurrence If **Multiple occurrences** is selected, each and every occurrence of the search text in a field is replaced. If **First occurrence** is select, only the first one is replaced.

Search & Replace Records You can process all or only some of the records:

- **All Records in the Table** To process all records.
- **Records meeting these conditions** To process only certain records:
 - **Record Range** Process records between the **From** and **To** range. To count from a specific record all the way to the end of the file, specify "0" as the **To** record.
 - **For (Expression)** Restrict processing to only records that meet the specified criteria. The **For** expression must be entered in dBASE syntax. You can use the Expression Builder if you need help.
 - **While (Expression)** Stop processing when records no longer meet the specified criteria. The **While** expression must be entered in dBASE syntax. You can use the Expression Builder if you need help.

When you have completed this dialog and hit **OK**, you are prompted for a Processing Mode.

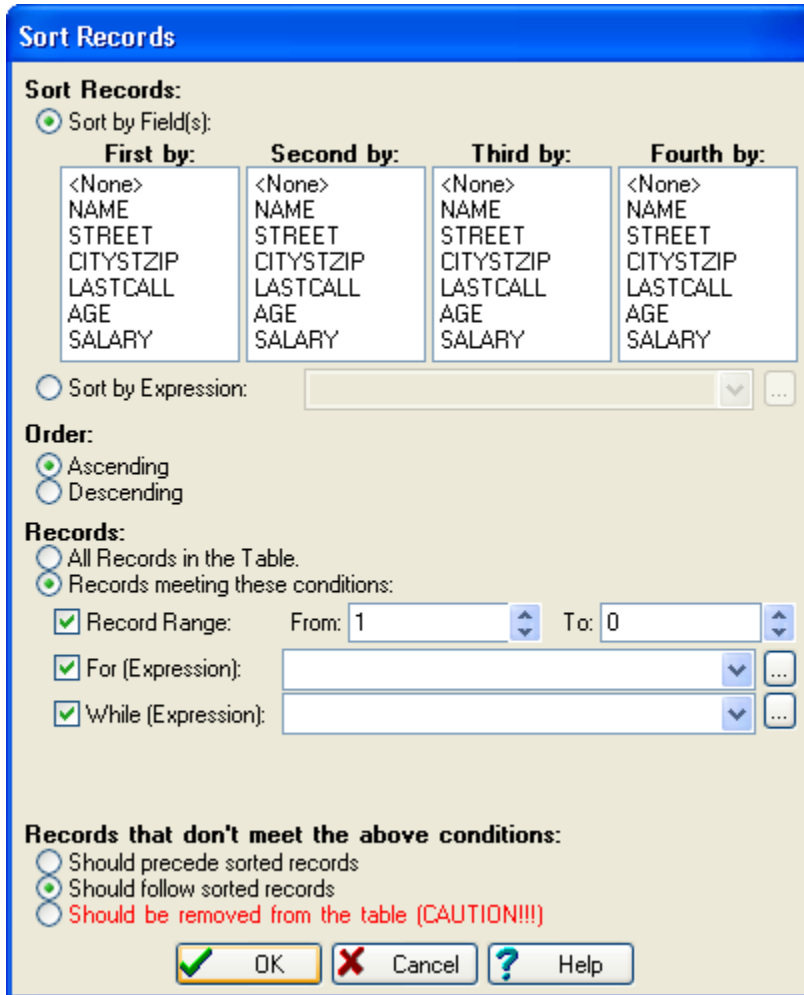
Melissa Data has gone through several different iterations of methodology to determine leading and trailing spaces (DOS users will remember the degree symbol and "plaiditer" systems). With our Windows programs, you just need to type in the phrase just as you would like it to be searched or replaced. For example, if you want to search for "and", with trailing and leading spaces, enter it as " and " (note the leading and trailing spaces; don't type the

double quotes). The trailing space(s) won't appear unless you highlight the contents of the entry (in the field, hit CTRL+A).

If you are using a Search and Replace file, you can use the original method to denote trailing spaces, the degree symbol (ASCII character 248).

6.1.13 Sort Records

Physically sorts a table by a specified criteria. This option is only available for dBASE files.



Sort Records How you would like to order the records:

- **Sort by Field(s)** Indexes by the field(s) you select.
- **Sort by Expression** Sorts the file according to the expression specified to the right. The **For** expression must be entered in dBASE syntax. You can use the Expression Builder if you need help.

Order Sequencing order:

- **Ascending** "A" before "B", "1" before "2", "03/10/68" before "04/10/68".
- **Descending** "C" before "B", "3" before "2", "05/10/68" before "04/10/68".

Records You can sort all or only some of the records:

- **All Records in the Table** To sort all records.
- **Records meeting these conditions** To sort only certain records:
 - **Record Range** Sort records between the **From** and **To** range. To count from a specific record all the way to the end of the file, specify "0" as the **To** record.
 - **For (Expression)** Restrict sorting to only records that meet the specified criteria. The **For** expression must be entered in dBASE syntax. You can use the Expression Builder if you need help.
 - **While (Expression)** Stop sorting when records no longer meet the specified criteria. The **While** expression must be entered in dBASE syntax. You can use the Expression Builder if you need help.

Records that don't meet the above conditions If **Record Range**, **For** or **While** conditions are specified, you need to indicate what to do with records that don't satisfy the conditions:

- **Should precede sorted records** Records not matching the criteria will be placed (in 'natural' order) before the sorted records.
- **Should follow sorted records** Records not matching the criteria will be placed after the sorted records.
- **Should be removed from the table** Records not matching the criteria will be **permanently removed**.

6.1.14 Split Table

Splits the table into one or more sub-tables using the method you select (indicated on the tabs at the top of the dialog):

- **<n> Records/Bytes/Files** Split the table so that the resultant tables are no larger than the specified size.
- **<n> th Select** Split the table so that every nth record is taken.
- **Random Select** Randomly select a specified number of records from the table.
- **Contents of Field** Use a source field to determine which resultant table a record should be copied. Commonly used for undoing a Merge/Purge or dividing a large table up by Zip Code or SCF.

Split Table: <n> Records/Bytes/Files

Split Table

<n> Records/Bytes/Files <n>th Select Random Select Contents of Field

Table will be split into <n> Records, Bytes, or Files.

Make files having no more than: 0 records each

Make files no larger than: 0 bytes each

Make exactly: 0 files of (nearly) equal size

Output Files:

Ask me for a file name for each file

Assign files sequential numbers; put them in this folder:

Split Records:

All Records in the Table.

Records meeting these conditions:

Record Range: From: 1 To: 0

For (Expression):

While (Expression):

OK Cancel Help

Table will be split into <n> Records, Bytes, or Files Select the splitting method:

- **Make files having no more than...records each** Each output table will have the specified number of records (the last table may have fewer).
- **Make files no larger than...bytes each** Each output table will be the same size (the last table may be smaller).
- **Make exactly...files of (nearly) equal size** Records will be evenly divided into a specified number of tables.

Output Files Select how output tables will be named:

- **Ask me for a file name for each file** Each time a file is created, you will be prompted for a name.
- **Assign files sequential numbers; put them in this folder** Files will be named

0000001.dbf, 00000002.dbf, etc, and stored in the specified folder.

Split Records You can process all or only some of the records:

- **All Records in the Table** To process all records.
- **Records meeting these conditions** To process only certain records:
 - **Record Range** Process records between the **From** and **To** range. To count from a specific record all the way to the end of the file, specify "0" as the **To** record.
 - **For (Expression)** Restrict processing to only records that meet the specified criteria. The **For** expression must be entered in dBASE syntax. You can use the Expression Builder if you need help.
 - **While (Expression)** Stop processing when records no longer meet the specified criteria. The **While** expression must be entered in dBASE syntax. You can use the Expression Builder if you need help.

Split Table: <n>th Select

Split Table

<n> Records/Bytes/Files <n>th Select Random Select Contents of Field

Take every: 0 th record from the table

Also mark selected records for deletion

Split Records:

All Records in the Table.

Records meeting these conditions:

Record Range: From: 1 To: 0

For (Expression):

While (Expression):

OK Cancel Help

Take every...th record from the table Specify the gap between each record selected. For example, "4" will select every fourth record or 25% of the table.

Also mark selected records for deletion Selected records are marked for deletion. This option is provided so that you can provide incremental selections. For example, if you later wanted to process only the records that were previously selected, you could specify a **For Expression of deleted()**. This option is only available for dBASE files.

Split Records You can process all or only some of the records:

- **All Records in the Table** To process all records.
- **Records meeting these conditions** To process only certain records:
 - **Record Range** Process records between the **From** and **To** range. To count from a specific record all the way to the end of the file, specify "0" as the **To** record.
 - **For (Expression)** Restrict processing to only records that meet the specified criteria. The **For** expression must be entered in dBASE syntax. You can use the Expression Builder if you need help.
 - **While (Expression)** Stop processing when records no longer meet the specified criteria. The **While** expression must be entered in dBASE syntax. You can use the Expression Builder if you need help.

Split Table: Random Select

The screenshot shows the 'Split Table' dialog box with the 'Random Select' tab selected. The dialog has a title bar 'Split Table' and four tabs: '<n> Records/Bytes/Files', '<n>th Select', 'Random Select', and 'Contents of Field'. The main area contains the following controls:

- 'Randomly select: 0' (spin box) 'records from the table'
- 'Also mark selected records for deletion'
- Split Records:**
 - 'All Records in the Table.'
 - 'Records meeting these conditions:'
 - 'Record Range: From: 1' (spin box) 'To: 0' (spin box)
 - 'For (Expression):' (text box with dropdown arrow and ellipsis)
 - 'While (Expression):' (text box with dropdown arrow and ellipsis)

At the bottom are three buttons: 'OK' (with a green checkmark icon), 'Cancel' (with a red X icon), and 'Help' (with a question mark icon).

Randomly select...records from the table Specify how many records should be selected.

Also mark selected records for deletion Selected records are marked for deletion. This option is provided so that you can provide incremental selections. For example, if you later wanted to process only the records that were previously selected, you could specify a **For Expression of deleted()**. This option is only available for dBASE files.

Split Records You can process all or only some of the records:

- **All Records in the Table** To process all records.
- **Records meeting these conditions** To process only certain records:
 - **Record Range** Process records between the **From** and **To** range. To count from a specific record all the way to the end of the file, specify "0" as the **To** record.

- **For (Expression)** Restrict processing to only records that meet the specified criteria. The **For** expression must be entered in dBASE syntax. You can use the Expression Builder if you need help.
- **While (Expression)** Stop processing when records no longer meet the specified criteria. The **While** expression must be entered in dBASE syntax. You can use the Expression Builder if you need help.

Split Table: Contents of Field

Split Table

<n> Records/Bytes/Files <n>th Select Random Select Contents of Field

Base split on contents of field: STREET

Start at character position: 0

Number of characters to use: 0

Output Files:

Ask me for a file name for each file

Use the contents of the field as the file name; put them in this folder:

Assign files sequential numbers; put them in this folder:

Split Records:

All Records in the Table.

Records meeting these conditions:

Record Range: From: 1 To: 0

For (Expression):

While (Expression):

OK Cancel Help

Base split on contents of field Select the field whose contents will determine to which table a record will be copied.

Start at character position Specify the point in the field at which data should be extracted for the split.

Number of characters to use Specify how many characters should be used to determine the split (counting starts at the **Start Position**, not the start of the field).

Output Files Select how output tables will be named:

- **Ask me for a file name for each file** Each time a file is created, you will be prompted for a name.
- **Use the contents of the field as the file name; put them in this folder** The contents of the field will be used as the file name (illegal characters are stripped) and stored in the specified folder.
- **Assign files sequential numbers; put them in this folder** Files will be named 0000001.dbf, 0000002.dbf, etc, and stored in the specified folder.

Split Records You can process all or only some of the records:

- **All Records in the Table** To process all records.
- **Records meeting these conditions** To process only certain records:
 - **Record Range** Process records between the **From** and **To** range. To count from a specific record all the way to the end of the file, specify "0" as the **To** record.
 - **For (Expression)** Restrict processing to only records that meet the specified criteria. The **For** expression must be entered in dBASE syntax. You can use the Expression Builder if you need help.
 - **While (Expression)** Stop processing when records no longer meet the specified criteria. The **While** expression must be entered in dBASE syntax. You can use the Expression Builder if you need help.

6.1.15 Add Column

A column will be added to the browser at the highlighted column position. Its contents will be what you specify below:



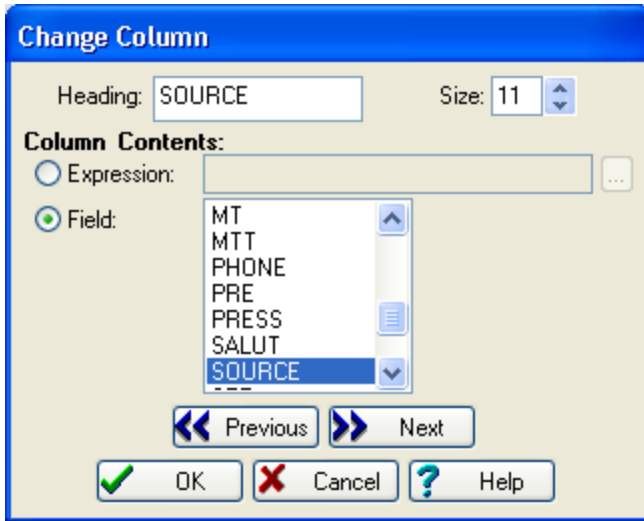
Heading/Size The name and size of the column you want to create.

Column Contents What should be displayed in the column:

- **Expression** Display the result of the specified expression as the column contents. The expression must be entered in dBASE syntax. You can use the Expression Builder if you need help.
- **Field** Displays the contents of an existing field.

6.1.16 Change Column

A column will be added to the browser at the highlighted column position. Its contents will be what you specify below:

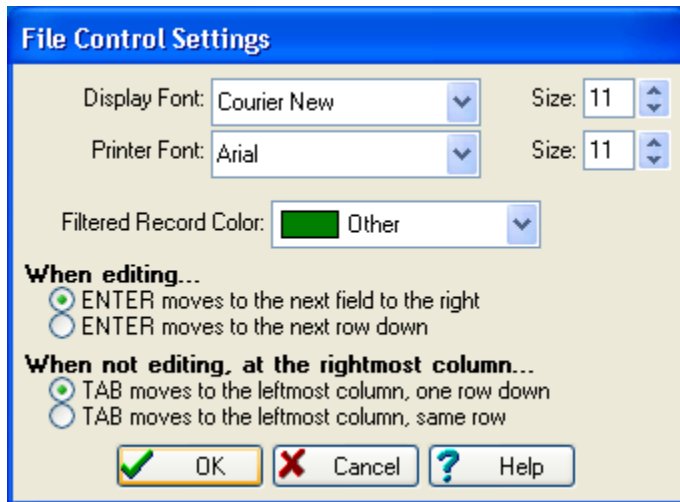


Heading/Size The name and size of the column.

Column Contents What should be displayed in the column:

- **Expression** Display the result of the specified expression as the column contents. The expression must be entered in dBASE syntax. You can use the Expression Builder if you need help.
- **Field** Displays the contents of an existing field.

6.1.17 Settings



Display Font/Size The browser's font.

Printer Font/Size The font used when printing.

Filtered Record Color The default color used for records that are being filtered.

When editing... Control the behavior of the ENTER key:

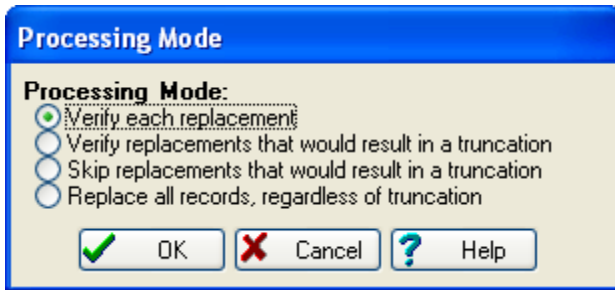
- **ENTER moves to the next field to the right** When editing a field, the ENTER key will move the cursor to the next field to the right.
- **ENTER moves to the next row down** When editing a field, the ENTER key will move the cursor to the same field, next row down.

When not editing, at the rightmost column... Control the behavior of the TAB key:

- **TAB moves to the leftmost column, one row down** When in the rightmost column, the TAB key will move the cursor one row down and circle to the first column.
- **TAB moves to the leftmost column, same row** When in the rightmost column, the cursor will circle back to the first column of the same row.

6.1.18 Processing Mode

The Processing Mode dialog appears on the Search & Replace, Replace/With and Concatenate Fields commands:



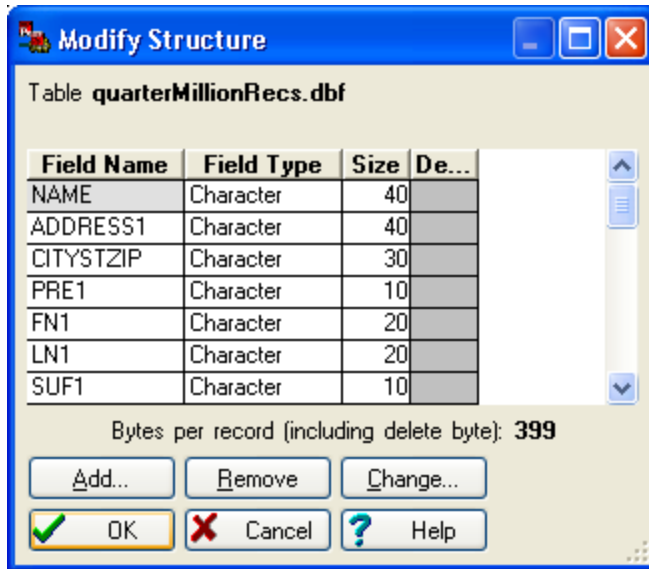
Processing Mode Specify what records should be brought to your attention for review:

- **Verify each replacement** The screen will display the current contents of the field and what it will look like after replacement. The processor will ask if you want to process the record every time.
- **Verify replacements that would result in a truncation** The field is displayed for review only when processing will result in a truncation. If the replacement string is longer than the search string (so a truncation would result), the processor will pause to verify whether or not to proceed with the replacement.
- **Skip replacements that would result in a truncation** In all cases the search string is automatically replaced with the replacement string *unless* the replacement will cause a truncation. No replacements are displayed to the screen.
- **Replace all records, regardless of truncation** In all cases, the field is automatically replaced with the replacement string or as much of the replacement string as will fit - no exceptions. These replacements are not displayed to the screen.

6.2 Modify Structure

Modify Structure allows you to change the structure of a dBASE table: to add new fields, delete fields, move fields, resize fields, and rename fields.

With the exception of renaming fields, all structure changes require enough disk space to make a copy of the current database.

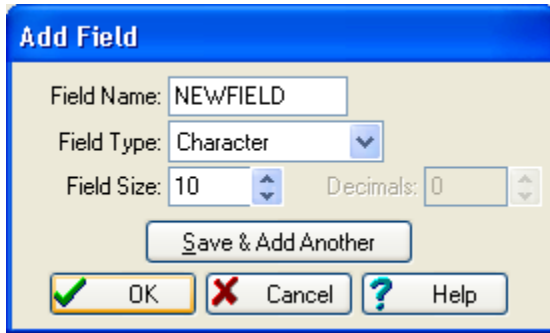


Add Add a new field at the highlight's position.

Remove Remove the currently highlighted field.

Change Modify the currently highlighted field. You can also modify fields by double-clicking the Field Name, Type, Size or Decimals entry that you want to change.

Adding Fields:



Field Name Field names must be between 1 and 10 characters. The first character must be alphabetic, but the others may be letters, numbers, or the underline (_). Embedded spaces are not allowed.

Field Type There are four options: Character, Date, Logical, and Numeric.

Field Size Date fields are automatically sized to 8 and Logical fields to 1. Character field sizes must be between 1 and 254. Numeric field sizes must be between 1 and 20. Remember that if you shorten a field, you will lose any data that exceeds the new field width.

Decimals (Numeric fields only) Decimal places must be between 0 and the field's size minus 2 (i.e., a numeric field of size 10 can have between 0 and 8 decimal places).

6.3 ASCII Conversion

6.3.1 Import from ASCII

Most database applications can convert to and from ASCII, since this is the most universal data format available. To use Personator with data in other formats, start by converting your data to ASCII.

Upon selecting this option, you are first prompted for the name and location of the ASCII file. Then, the following screen is presented:



Use the Interactive Importer Use the Interactive Importer to determine the ASCII file's structure.

Manually Enter Manually type in the ASCII file's structure.

Inherit currently selected table's structure The structure of the currently open table will be used as a starting point for the ASCII file's structure. The Interactive Importer is then displayed for you to fine-tune the results.

Append to the currently selected table The ASCII file is appended directly to the end of the current table. The ASCII file's structure must match the current or the ASCII file's records will not be imported correctly.

Copy another table's structure Use another table (that you will select) as a starting point for the ASCII file's structure. The Interactive Importer is then displayed for you to fine-tune the results.

Once the ASCII file's structure has been specified and/or reviewed (using one of the above methods), you are prompted for an output table name. The file is then imported.

Import from ASCII: Interactive Importer

Import from ASCII (C:\Dt\Projects\nonprofit.csv)

ASCII File Information
 ASCII File Type: **Delimited** Delimiter: , (44)
 Record Size: **100** Fields: **9**

Currently Selected Field
 Name: **FIRST** Size: **10**
 Type: **Fixed Character** Offset: **0**

FIRST	LAST	STREET	CITY	STA...	ZIP
FIRST	LAST	STREET	CITY	STATE	ZIP
Ronald	Robinson	306 Big Woods Dr.	Brooklyn	NC	16907-07
Phil	Scott	3391 Mockingbird Ln.	El Paso	MA	23678-98
Spencer	Lewis	5700 Mockingbird Ln.	Scarsdale	IN	09276-96
Beverly	Stewart	8624 Ketch Dr.	Hackensack	IL	54903-69
Pierre	Findley	5533 Pinto Ct.	Lowell	KY	50507-83
Emily	Harper	2672 The Greens	Urbana	OK	34781-47
Bo	Hunt	5017 Hope Rd.	Panama City	WA	47652-16
Ellis	Francois	7039 Stones Throw Dr.	Moultrie	MD	65834-14
Mercedes	Yoder	5063 Hunter Dr.	Spokane	CT	63278-78
Shirley	Hall	4219 Wisteria Lane	Los Angeles	OR	47810-56
Maxine	Brennan	5955 Ivy Court	Amarillo	AK	12729-49
Mickola	Harris	640 Cutter Ct.	Fort Dix	WA	70903-63
Mercedes	Sabo	9166 Woodbine Pl.	Staten Island	AR	92585-03

Exclude Field Clear Fields Get field names from first record.

File Info... Field Info... OK Cancel ? Help

Split Field (SDF and Flat File formats only) You can split the highlighted field into two smaller fields by clicking this button. The field will be split in half and then you can adjust the fields' sizes by dragging the dividing line to the left or right. Note that this is a positional split, not an intelligent split. You cannot use Split Field to break up a name field ("Mr. John Smith") into its parts. For this type of work, you should use the Name Splitter.

Join Field (SDF and Flat File formats only) You can join two adjacent fields into a single larger field by clicking this button. The highlighted field and its neighbor to the left will be joined.

Exclude Field You can intentionally exclude a field during importing by clicking this button. Of course, this field won't be removed from the original ASCII file, just the imported database. Excluded fields are shown in gray.


Clear Fields You can wipe out all of the fields (so you can start all over) by clicking this button.

Get field names from first record If the ASCII file's first record contains field names (as opposed to data), then check this box to use that data as field names (you can still change them to whatever you like). During the import, the first record will not be imported as data.

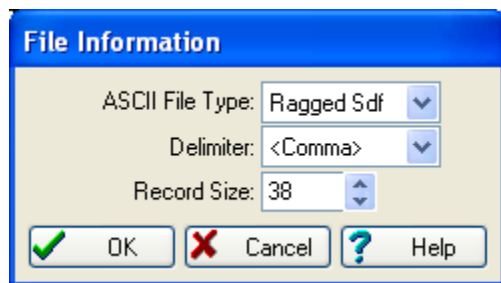
File Info Click this button if you need to change the ASCII file's type. Occasionally, the program will incorrectly guess the file's type and/or record size. Changing an ASCII file's type will cause the importer to reassign fields, so any changes made to field names, positions, etc., will be lost.

Field Info Click this button or double-click on the field's heading to change the information about the highlighted field. You can change the field's name, type, size and decimal places.

Adjusting Offsets:

(SDF and Flat File only) If the break between two fields isn't where it is supposed to be, you can move the offset by moving the pointer (in the field's heading) until it becomes a , then dragging the field's edge to the desired offset.

Interactive Importer: File Information



ASCII File Type The type of ASCII file being imported:

- **SDF** Often called "fixed field" or "standard data format". Fields are of fixed length (padded with spaces) and each record is delimited with a carriage return and a line feed.
- **Ragged SDF** A spin-off of the SDF format, usually made by custom or in-house programs. The difference is that all trailing blanks at the end of each record are trimmed off.
- **Flat File** A common mainframe format. Fields are of fixed length, just like SDF, but there are no record delimiters of any kind.
- **Delimited** A common ASCII format. Fields are of varied length and delimited with a single character, usually a comma or a tab. Sometimes (particularly with character fields), fields are surrounded with double quotes. Each record ends with a carriage return and a line feed.

Delimiter (Delimited format only) The character that separates fields. Everybody's favorites, <Comma> and <Tab>, are listed first.

Record Size (SDF and Flat File formats only) The number of bytes used to store each record. Remember to count the carriage return and/or line feed in this number.

Interactive Importer: Field Information



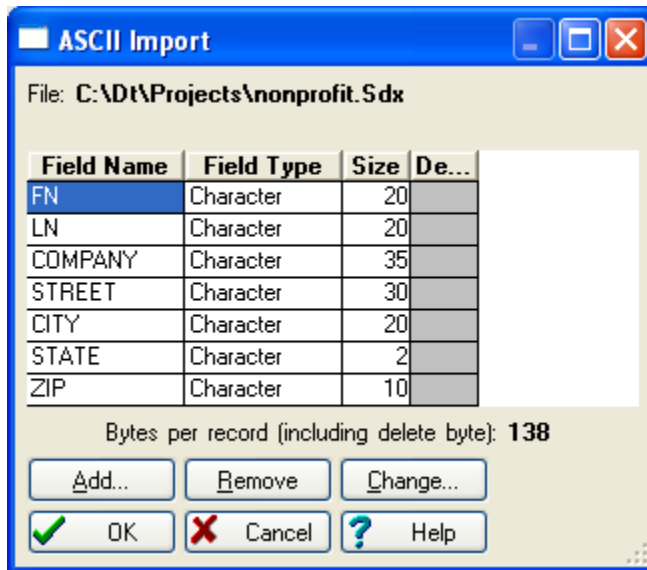
Field Name The field name must be between 1 and 10 characters. The first character must be alphabetic, but the others may be letters, numbers, or the underscore (_). Embedded spaces are not allowed.

Field Type There are seven options: Fixed Character, Variable Character, Integer, Float, Decimal, Logical, and DateTime. The program will automatically change the size of some of these types.

Field Size Some fields have fixed sizes, so you cannot edit these sizes. Character field sizes must be between 1 and 254.

Decimals (Numeric fields only) Decimal places must be between 0 and the field's size minus 2 (i.e., a numeric field of size 10 can have between 0 and 8 decimal places).

Import from ASCII: Manually Enter



Add (or CTRL+INSERT) Add a new field to the bottom of the list.

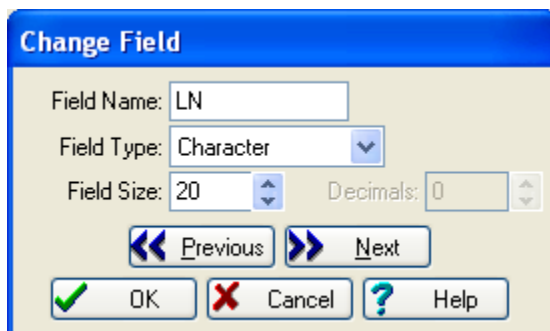
Remove (or CTRL+DELETE) Delete the currently highlighted field.

Change Modify the currently highlighted field. You can also modify fields by double-clicking the Field Name, Type, Size or Decimals entry that you want to change.

Moving Fields:

To move a field, just click and drag it to the desired location. Alternately, you can press CTRL+UP or CTRL+DOWN to accomplish this.

Adding Fields:



Field Name Field names must be between 1 and 10 characters. The first character must be alphabetic, but the others may be letters, numbers, or the underline (_). Embedded spaces are not allowed.

Field Type There are seven options: Fixed Character, Variable Character, Integer, Float, Decimal, Logical, and DateTime. The program will automatically change the size of some of these types.

Field Size Date fields are automatically sized to 8 and Logical fields to 1. Character field sizes must be between 1 and 254. Numeric field sizes must be between 1 and 20. Remember that if you shorten a field, you will lose any data that exceeds the new field width.

Decimals (Numeric fields only) Decimal places must be between 0 and the field's size minus 2 (i.e., a numeric field of size 10 can have between 0 and 8 decimal places).

6.3.2 Export to ASCII

Export to ASCII

Export Fields:

Source Table:

NAME	Fixed Character	30
STREET	Fixed Character	30
CITYSTZIP	Fixed Character	30
LASTCALL	DateTime	
AGE	Decimal	2.0
SALARY	Decimal	6.0

Output File:

Buttons: Add >>, << Remove, All >>, << None

Export Options:

File Type: [Dropdown]

Delimiter: <Comma> [Dropdown]

Add first record with field names.

Macintosh format (CRs, no LFs).

Export records marked for deletion.

Strip embedded CRs and LFs.

Delimit data with double quotes:

Always.

Only character fields.

Only when there is a comma.

Never.

Buttons: [OK] [Cancel] [Help]

Source Table This lists each field in the table. By default, all fields will be exported. If you wish to export just a few fields, first click **None**, then click the field(s) to export and click **Add**.

Output File This lists each field to be exported. To remove field(s) from the list, click the field(s) to remove and click **Remove**. Note that the output field order of the **Output File** will always follow the same order as the **Source Table**. The only way to change the order is to physically modify the table's structure before exporting.

File Type The type of ASCII file to be created:

- **SDF** Often called "fixed field" or "standard data format". Fields are of fixed length (padded with spaces) and each record is delimited with a carriage return and a line feed.
- **Flat File** A common mainframe format. Fields are of fixed length, just like SDF, but there are no record delimiters of any kind.
- **Delimited** A common ASCII format. Fields are of varied length and delimited with a single character, usually a comma or a tab.

Delimiter (Delimited format only) The character that separates fields. Everybody's favorites, <Comma> and <Tab>, are listed first.

Add first record with field names Check this box to create an initial record that contains the field names (your ASCII file will be one record longer).

Macintosh format (CRs, no LFs) (SDF and Delimited formats only) Check this box to terminate each record with only a carriage return. Some Apple applications require this format.

Export records marked for deletion (dBASE tables only) Check this box to export records, regardless of whether or not the record's been marked for deletion. Deletion marks don't exist in ASCII files, so all records will appear as 'normal' in the ASCII file.

Strip embedded CRs and LFs Sometimes you will come across tables where field(s) have carriage returns (CRs) and/or line feeds (LFs) embedded (i.e., the characters aren't being used to delimit records - Excel seems to be the most common source of this problem.). These embedded CR/LFs can cause big problems with some database applications, so we offer the option of stripping them here.

Delimit data with double quotes There are several different standards as to how fields should be delimited:

- **Always** Every field gets delimited with double quotes.
- **Only Character Fields** Only character fields get double quotes - this is the most popular standard.
- **Only when there is a comma** The field is delimited with double quotes if a comma is embedded in the field.
- **Never** No double quote delimiters ever.

6.4 Lookup Tables

WARNING! If you plan to modify the Lookup Tables, read this section carefully.

Personator relies on lookup tables to perform many functions. These lookup tables are dBASE formatted files that you can modify. The structure and use of each lookup table is described under the appropriate sub-section of this topic.

This utility allows you to explore, edit, append new records, delete records, etc. in Personator's Lookup Tables. The good news is it's easy, and you can mold Personator's processing behavior just as you want it. The bad news is if you don't read and understand this section, the program's accuracy will decline.

When editing the lookup tables:

- The best advice is to "follow suit". In other words, look at the words supplied in the table and follow the way they are formatted and coded.
- Use all uppercase in the lookup field (this is usually the first field in the database).
- Commas and periods are usually unnecessary.
- In most cases, multiple words are not allowed (unless noted otherwise).

Table Structure:

Although field name and field position are critical to proper operation, field sizes can be extended if necessary to accommodate larger lookup strings. However, this should be done economically, as excessively large lookup fields will slow performance. This can be done through Modify Structure if necessary. Each Lookup Table does not have exactly the same structure, so go to the specific table's section before making significant changes.

Lookup Table Usage:

The following is a quick summary of how Personator uses each lookup table:

- **Prefix** Name prefixes. Used when splitting names and assigning genders.
- **First Name** First names and genders. Used when splitting names, assigning genders and creating salutations.
- **Genderbase** First names and genders. Used when assigning genders and detecting misspellings.
- **Genderbase Misspelling** First name corrections. Used when fixing misspellings.
- **Last Name Prefix** Words that commonly appear in front of last names (and are considered part of the last name). Used when splitting names.
- **Last Name** Last names. Used when splitting names.
- **Suffix** Name suffixes. Used when splitting names, assigning genders and creating salutations.
- **Dual Name Connector** Words and phrases used to separate dual names. Used when splitting names.
- **Street Address** Various words associated with street addresses. Used when splitting street addresses.
- **State** US states and Canadian provinces along with their correct abbreviations. Used

when splitting city/state/zips.

6.4.1 Prefix

The Prefix table (ppre.dbf) is used to identify prefixes ("Mr", "Dr", etc) when splitting names and to determine the gender of a prefix when assigning genders. It consists of three fields:

- **Prefix** The prefix to be looked up.
- **Sex** The gender attached to the prefix (if any). Gender can be "M", "F" or blank.
- **Dual Expansion** Expansion that should be used when dual name splitting. For example, "D&D" has an expansion of "Dr. & Dr.", which makes dual name splitting possible with this prefix.

6.4.2 First Name

The First Name table (pfn.dbf) is used to determine directionality when splitting names, to determine the gender of first names, and to determine whether a valid salutation can be created. It consists of four fields:

- **First Name** The name to be looked up.
- **Gender** The gender attached to the name. Sexing can be specified in either of two ways:
 - **Conventional Genderizing** "M" for male, "F" for female, and "N" for neutral.
 - **Population Genderizing** The gender is specified on a sliding scale from "1" (definitely female) to "7" (definitely male). See below for more information.
- **Misspelling** "X" indicates that this field is a misspelling and should be flagged as such. If Genderbase with Correction has been selected, Personator will try to find a correction entry in the Genderbase Misspelling table.
- **Rank** The popularity of the name. Popularity is used to determine a full name's directionality. For example, "Abdel Mike" is probably "Mike Abdel" because "Mike" is a much more popular first name than "Abdel".

A Short Discussion on Gender:

When you have a database that is predominately one gender, it is more likely that a vaguely genderizable name is actually that gender. For example, in a Woman's magazine list, the name "Lee" is very likely to be a female.

Personator gives you seven levels of gender to choose from. Personator uses this level with the Precision and Population settings to determine a name's gender. The method is quite straightforward:

		Male		Neutral		Female	
Conservative	All 7	Very 6	Normally 5	4	Normally 3	Very 2	
	Neutral	M					
	Male	M	M				
	Female	M					F
Average							
	Neutral	M	M				F
	Male	M	M	M			F
	Female	M	M		F		F
Aggressive							
	Neutral	M	M	M		F	F
	Male	M	M	M	M		F
	Female	M	M		F	F	F

And there you have it. So, for the name "Lee" (which has a level of 5), the record will be considered male for Standard Precision/Male Population, Aggressive Precision/Male Population, and Aggressive Precision/Neutral Population, neutral for the remaining precisions and populations.

6.4.3 Genderbase

The Genderbase table (pfnlong.dbf) is used to determine the gender of first names and whether a first name has been misspelled. It consists of three fields:

- **First Name** The name to be looked up.
- **Gender** The gender attached to the name. Genderizing can be specified in either of two ways:
 - **Conventional Genderizing** "M" for male, "F" for female, and "N" for neutral.
 - **Population Genderizing** Gender is specified on a sliding scale from "1" (definitely female) to "7" (definitely male). See First Name Table for more information.
- **Misspelling** "X" indicates that this field is a misspelling and should be flagged as such. If Genderbase with Correction has been selected, Personator will try to find a correction entry in the Genderbase Misspelling table.

6.4.4 Genderbase Misspelling

The Genderbase Misspelling table (pfnfix.dbf) is used to fix misspelled first names. It consists

of two fields:

The Genderbase table (pfnlong.dbf) is used to determine the gender of first names and whether a first name has been misspelled. It consists of two fields:

- **Misspelling** The name to be looked up.
- **Correction** The corrected spelling.

Note that any entry in this table should be also added to either the First Name Table or the Genderbase Table, with an "X" in the Misspelling field.

6.4.5 Last Name Prefix

The Last Name Prefix table (plnpre.dbf) is used to identify those little 'mini-words' that sometimes come before some foreign last names (for example, "van Halen", "Mac Donald", etc). The splitter does not split these words into a separate field but rather considers them part of the last name. It consists of a single field:

- **Last Name Prefix** The last name prefix to be looked up.

6.4.6 Last Name

The Last Name table (pln.dbf) is used to determine directionality when splitting names and whether or not a solitary "O" preceding a last name should be considered part of the last name (for example "O Malley"). The table consists of three fields:

- **Last Name** The name to be looked up.
- **Rank** The popularity of the name. Popularity is used to determine a full name's directionality. For example, "Smith Mike" is probably "Mike Smith" because "Smith" is a much more popular last name than "Mike".
- **O-Name** Whether or not the name starts with "O" (see below).

O'-Names:

Names on this table that start with the letter "O" may be considered an Irish name if O-Name contains an "X". A name like "JOHN OCKERMAN" has a last name of "Ockerman", whereas "JOHN OLEARY" has a last name of "O'Leary". Additionally, this table is used in determining if a name like "JOHN O LEARY" (note the space) should be "John O. Leary" or "John O'Leary".

6.4.7 Suffix

The Suffix table (psuf.dbf) is used to identify suffixes ("Jr", "Sr", etc.) when splitting names. This table is also used to determine whether certain suffixes should get an alternate prefix

while genderizing and making salutations (like "MD" for "Dr."). It consists of four fields:

- **Suffix** The suffix to be looked up.
- **Prefix** The prefix that can always be attached to this suffix (for example, "Mr." for "2nd").
- **Salutation Remove** If this suffix should be removed once it has been transformed, put an "X" in this field.
- **Dual Name Remove** If this suffix should be removed when a dual name is split into two separate names. For example, "President", because the dual name splitter will not be able to determine which name should receive the title.

6.4.8 Dual Name Connector

The Dual Name Connector table (pdual.dbf) is used to identify words and phrases that connect dual names. Unlike most of the other lookup tables, multiple words are allowed here. The table consists of a single field:

- **Dual Name Connector** The word or phrase to look up.

6.4.9 Street Address

The Street Address table (pstr.dbf) is used to parse street addresses. You are allowed to enter multi-word lookups in this table. The table consists of four fields:

- **Lookup** The word or phrase to be looked up.
- **Expand** How the entry should appear when expanded. This entry should be properly cased and punctuated.
- **Abbreviate** How the entry should appear when abbreviated. Like Expand, casing and punctuation are important.
- **Code** The type of component(s) represented by this entry.

Codes:

- **Name** Depending on the context, this word will become either a Name or a Secondary. (e.g., "10 College Rd.").
- **Remove** This word will be deleted from the output address line! You could use this to remove words like "C/O". Because this is your data (and we care about your data), we did not enter any words to be removed.
- **Directional** This word will usually become a Pre- or Post- Directional. All US Directionals are coded as Directional/Highway, so there is nothing in the table coded as only "Directional" We left this definition in because there may be a word(s) in a foreign address that would be a directional, but not a strong indicator of a highway.
- **Name or Highway** This word will become a Name or Secondary, and is a strong indicator of a highway pattern (e.g., "12 County Rd" or "County Route 6").
- **Suffix** Depending on the context, this word will become either a Suffix or a Name (e.g., "2 Terrace St").
- **PO Box or Rural Route** This word will become a PO Box (which also covers RFDs, HCs, PO Drawers, and Star Routes).
- **Secondary (1)** This Secondary can follow or precede an associated alpha and/or numeric (e.g., "Floor 1" and "First Floor"). "Floor" is the only Secondary we've thought of that fits this type. "Apt" and "Ste" don't because they only precede an alpha and/or numeric.
- **Secondary (2)** This Secondary has no associated alpha/numeric (e.g., "Basement", "Lobby").
- **Secondary (3)** This Secondary can only lead an associated alpha and/or numeric (i.e., "Apt 3" and "Suite C"). These words don't fall into the Secondary 1 type because Secondary 1 type words must be able to be used before or after the alpha and/or numeric.
- **Numeric Prefix** This word is sometimes an extra numeric identifier (e.g., "Lot 12 Main Street" or "20 Main Street # 50"). These identifiers are redundant in these examples. However, words like "Lot" can also be a secondary and therefore we don't want to strip them from the address. Be careful when creating Numeric Prefixes. They greatly influence the splitter's behavior towards numerics.
- **Directional or Highway** This is a Pre- or Post- Directional, and a strong indicator of a highway pattern. (e.g., "10 SE Expy"). All US Directionals are coded as Directional/Highway.
- **Suffix or PO Box/Rural Route** This word can indicate a suffix or PO Box/Rural Route. "Rd" is the only entry coded this way.
- **Suffix or Highway** This word is a strong indicator of a highway pattern (e.g., "35 Freeway 21").
- **Suffix or Secondary (3)** Depending on its context, this word will become either a Suffix or a Secondary (e.g., "Briarwood Bldg" or "Bldg 1A").
- **PO Box/Rural Route or Highway** Depending on its context, this word will become either a PO Box or Name (e.g., "US Route 10" and "Rural Route 3 Box 5").

Notice the frequency of the words "depending" and "usually" in the above definitions. In many cases, a word can serve as an indicator of more than one thing. And almost all words can be a Name. The street splitter relies heavily on the context of a word to determine its purpose.

What this means to you is that specifying a type in this table does not ensure that the word will always come out as that type.

The **Code** field of the street lookup table is a packed binary 4-byte integer. It is recommended that you don't try to modify this field except through Personator.

6.4.10 State

The State table (pstate.dbf) is used to determine whether or not a word or series of words represent a state or province.

The state table is one of only a few tables that allow multiple word lookups. Multiple word lookups must be built incrementally (and from *right to left*). For example, for "Prince Edward Island", there exists three entries:

State	Abbreviation
Island	
Edward Island	
Prince Edward Island	PE

The "Island" entry tells Personator that it's not a state yet (because there's no ST abbreviation, but it may 'grow' into one if the right information is to the left. The "Edward Island" entry says the same thing. The "Prince Edward Island" entry says that we have a full state on our hands which can be abbreviated into "PE".

Incremental lookups can result in a correct state. For example:

State	Abbreviation
Virginia	VA
West Virginia	WV

However, when Personator finds the "VA" for "Virginia", it doesn't give up. It looks to the left of the word "Virginia". If it finds "West", it will abbreviate "West Virginia" to "WV". If it finds nothing, it will use the "VA" abbreviation.

The State table consists of two fields:

- **State** The word or phrase to be looked up.
- **Abbreviation** The state abbreviation.

In most cases, you will not find the common 2-letter abbreviations as lookups in this table because Personator has a built-in table of these abbreviations. However, you can add additional two-letter abbreviations here. This is particularly useful during Canada's annual changing of the Quebec abbreviation; the lookup State= "PQ" is to be abbreviated to St="QC".

6.5 User Settings

If you invest three minutes now to set up Personator with your personal taste and style, it will pay off handsomely in the hours you will save in the future!

General General settings:

- **Interface** Modify Personator's general behavior.
- **Main Window** Change the appearance of Personator's main window.
- **User File Locations** Set the default locations of your setup and data files.
- **Auto-Update** Control how often Personator looks for updates.

Setup Setup settings:

- **Field Naming** Control how Personator guesses what kind of data is contained in a field.
- **Default Settings** Change the default Error Field.
 - **Name Splitter** Change the Name Splitter's default output fields.
 - **Genderizer** Change the Genderizer's default options.
 - **Salutation Maker** Change the Salutation Maker's default options.
 - **Address Splitter** Change the Address Splitter's default output fields.
- **Warnings** Suppress processor warnings.

Processing Processor options:

- **General** Set processing speed slider, work folder, etc.
- **Status Codes** Specify how error codes should be handled.

Analyzer Modify the analyzer's appearance.

6.5.1 General

General: Interface

General: Interface

ENTER key:

- ENTER moves to next dialog prompt, CTRL+ENTER hits OK
- TAB moves to next dialog prompt, ENTER hits OK.

Screen Saver:

- Don't suppress screen saver
- Suppress screen saver when processing

Tip of the Day:

- Always show tips at startup
- Show tip once per day
- Sometimes show tip
- Never show tip

Advanced: dBASE Emulation

If you don't have any idea what **SET EXACT** means or even what a dBASE is, leave this option unchecked.

If this option is checked, the string comparison **"BLACKWELL"="BLACK"** returns **True**. Note that you can use the Exact Equals operator (**==**) when you temporarily need **SET EXACT ON** behavior.

SET EXACT OFF

Advanced:ADO/DAO Usage

Access and Excel files can be accessed using either DAO (older) or ADO (newer).

You may find that one technology performs better than the other in certain situations.

- Use ADO for Access & Excel tables
- Use DAO for Access & Excel tables

ENTER key Control the behavior of the ENTER key in dialog boxes:

- **ENTER moves to the next dialog prompt, CTRL+ENTER hits OK** When navigating a dialog box, hitting ENTER will proceed to the next prompt. Technically, ENTER is supposed to hit the **OK** button, but many people find this an unnatural behavior, so we give you a more conventional interpretation.
- **TAB moves to the next dialog prompt, ENTER hits OK** When navigating a dialog box, hitting ENTER will immediately hit the **OK** button. This is standard Windows behavior.

Screen Saver Control the screen saver's behavior:

- **Don't suppress screen saver** The Windows screen saver's behavior will not be changed.

- **Suppress screen saver when processing** When processing, Personator will temporarily disable the screen saver. This ensures that all processing power is given to the program rather than rendering flying toasters.

Tip of the Day Control how often you want to see the Tip of the Day dialog:

- **Always show tips at startup** You'll get them every time.
- **Show tip once per day** Only the first time, so pay attention.
- **Sometimes show tip** Only when you least expect it.
- **Never show tip** Don't like them?

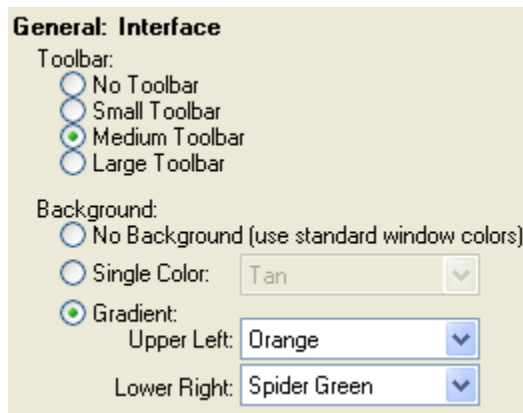
Advanced: dBASE Emulation:

SET EXACT OFF This advanced option allows you to control how the = operator behaves in dBASE expressions. If this is checked, "Shortcutted" string comparisons are performed. For example, "BLACKWELL"="BLACK" will return **true** (but "Black" will not equal "Blackwell"). This behavior is the opposite of SET EXACT ON.

Advanced: ADO/DAO Usage

This advanced option allows you to select which Microsoft technology to use when accessing Access and Excel files. You may find that one technology performs better than the other in certain situations. Also, see the Frequently Asked Questions if you are having difficulties with Access or Excel files.

General: Main Window



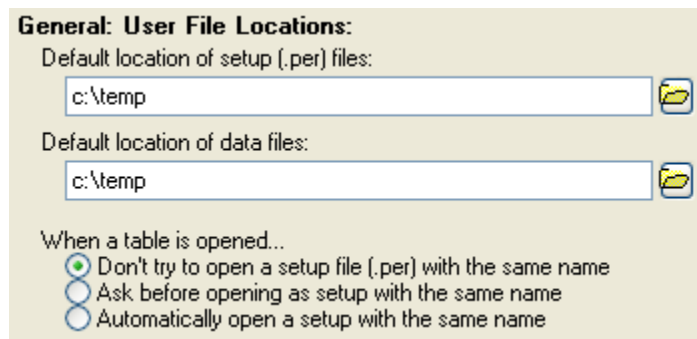
Toolbar Change the toolbar's appearance:

- **No Toolbar** Hide the browser's toolbar.
- **Small Toolbar** Display the small toolbar.
- **Medium Toolbar** Display the medium toolbar.
- **Large Toolbar** Display the large toolbar.

Background Change the main window's background:

- **No Background (use standard window colors)**
- **Single Color**
- **Gradient**

General: User File Locations



Default location of setup (.per) files: Lets Personator know where to start looking for your .per setup files.

Default location of data files: Lets Personator know where to look for your data files.

The above two options can make work a bit easier for you. If you always store your setup files and/or data files in the same location, it is worth your while to specify the folder(s) above. If specified, **File | Open Existing Table** and **File | Open Setup** will always start in the specified location. If no folder is specified, these commands will start in the last file location (which is very useful for some people).

When a table is opened Controls what should happen when a table is opened:

- **Don't try to open a setup file (.per) with the same name** Personator won't bother trying to open a setup file.
- **Ask before opening a setup file with the same name** Personator will try to find a setup file with the same name as the table. If one is found, Personator will ask you if it should be opened.
- **Automatically open a setup with the same name** Personator will try to find a setup file with the same name as the table and open it.

General: Auto Update

General: Auto-Update

At specific intervals, Personator can check to see whether or not there's a code update on our Internet web site.

Don't ever check for updates
 Periodically check for updates, but ask first
 Periodically check for updates without asking

Check for updates every: days.

Last update was done on **11/17/2006**.

Auto-Update Select how often Personator should check for updates:

- **Don't ever check for updates** You can still download updates from our web site and install them manually.
- **Periodically check for updates, but ask first** Sometimes you really need to get the job done without waiting for an update.
- **Periodically check for updates without asking** Updates are pretty fast over broadband connections and don't take more than a minute.

6.5.2 Setup

Setup: Field Naming

Setup: Field Naming

These descriptions are used to determine what kind of data is contained in a field.

Edit descriptions for:

Add description:

Existing descriptions:

This screen lets you customize how Personator determines what kind of data is contained in

a given field. By specifying your field naming habits, you can set up a new job significantly faster.

Edit Descriptions for Select the type of field you want to add naming description(s) to. For example, if you always name Prefix fields "MR_MS", you'll want to select "Prefix" in this drop down box.

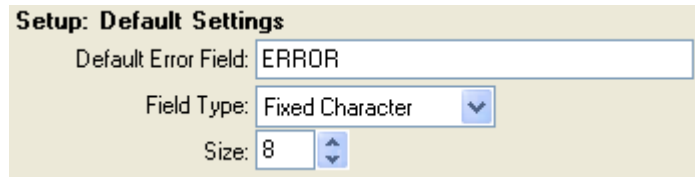
Add Description Enter a field name for this type of field. Wildcards are allowed. For example, if you always name Prefix fields "MR_MS", you'll want to put "MR*" or "MR_MS" in this box. When you have typed the information, click **Add** to put it on the **Existing Descriptions** list. If your database structures are fairly consistent, it is usually better to not use wildcards and specify the entire field name. For example, if you specified "CO*" to catch a field you usually call "COMPANY", Personator can mistake "CONTACT" as a Company field, as it fits the wildcard description.

Existing Descriptions Lists field names for the currently selected type of field.

Remove Removes the highlighted description from the list.

Move Up/Move Down The position of a field in the description list is important, as Personator evaluates the **Description List** from the top down. Therefore, you can improve how well Personator determines field names by putting the most common field descriptions at the top of the list.

Setup: Default Settings



Setup: Default Settings

Default Error Field:

Field Type: ▼

Size: ▲ ▼

In all setups (Name Splitter, Genderizer, Salutation Maker, and Address Splitter), an Error Field can be automatically specified. This setting applies only to *new setups*.

Default Error Field Field names must be between 1 and 10 characters. The first character must be alphabetic, but the others may be letters, numbers, or the underline (_). Embedded spaces are not allowed.

Field Type There are five options: Fixed Character, Variable Character, Integer, Float and Decimal.

Size Character field sizes must be between 1 and 254. Numeric field sizes must be between 1 and 20. Remember that if you shorten a field, you will lose any data that exceeds the new field width. See [Tools | User Settings | Processing | Status Codes](#) for suggested error field

sizes.

Default Settings: Name Splitter

Setup: Name Splitter

These field names and sizes will be used as default entries for output fields when creating new Name Splitter setups.

Prefix 1:	<input type="text" value="PREFIX"/>	10	▲▼
First Name 1:	<input type="text" value="FIRST"/>	20	▲▼
Middle Name 1:	<input type="text" value="MIDDLE"/>	20	▲▼
Last Name 1:	<input type="text" value="LAST"/>	20	▲▼
Suffix 1:	<input type="text" value="SUFFIX"/>	10	▲▼
Prefix 2:	<input type="text" value="PREFIX2"/>	10	▲▼
First Name 2:	<input type="text" value="FIRST2"/>	20	▲▼
Middle Name 2:	<input type="text" value="MIDDLE2"/>	20	▲▼
Last Name 2:	<input type="text" value="LAST2"/>	20	▲▼
Suffix 2:	<input type="text" value="SUFFIX2"/>	10	▲▼
Full Name 2:	<input type="text" value="FULL2"/>	30	▲▼

When a Name Splitter setup is created, these field names (and sizes if the fields don't exist in the table) will be automatically specified. If you have developed a field naming convention, entering it here will save you from ever entering it again in Name Splitter setups.

Default Settings: Genderizer

Setup: Genderizer

These settings will be used as default entries when creating new Genderizer setups.

Male Prefix:	<input type="text" value="Mr."/>
Female Prefix:	<input type="text" value="Ms."/>
Neutral Prefix:	<input type="text" value="Mx."/>

When a Genderizer setup is created, these prefixes will be automatically specified. If you have standard prefixes, entering them here will save you from ever entering them again in Genderizer setups.

Default Settings: Salutation Maker

Setup: Salutation Maker

These field names, sizes and settings will be used as default entries when creating new Salutation Maker setups.

Salutation Options:

Leave Blank	< - Click and drag these options to arrange these formats from most desirable (top) to least (bottom).
Create Formal Salutation ("Dear Mr. Smith")	
Create Informal Salutation ("Dear John:")	
Create FN-LN Salutation ("Dear John Smith")	

Use Neutral Slug ("Dear Customer:")

Output Salutation:

Salutation Prefix:

Salutation Terminator:

Salutation Slug:

Householding Prefix:

Householding Terminator:

When a Salutation Maker setup is created, these options will be automatically specified. If you have a standard set of options, entering them here will save you from ever entering them again in Salutation Maker setups.

Default Settings: Address Splitter

Setup: Address Splitter

These field names and sizes will be used as default entries for output fields when creating new Address Splitter setups.

Address Line 1:	<input type="text" value="Add1"/>	<input type="text" value="30"/>	<input type="button" value="▲"/> <input type="button" value="▼"/>
Address Line 2:	<input type="text" value="Add2"/>	<input type="text" value="30"/>	<input type="button" value="▲"/> <input type="button" value="▼"/>
Address Line 3:	<input type="text" value="Add3"/>	<input type="text" value="30"/>	<input type="button" value="▲"/> <input type="button" value="▼"/>
City:	<input type="text" value="City"/>	<input type="text" value="20"/>	<input type="button" value="▲"/> <input type="button" value="▼"/>
State:	<input type="text" value="State"/>	<input type="text" value="2"/>	<input type="button" value="▲"/> <input type="button" value="▼"/>
Zip/Postal Code:	<input type="text" value="Zip"/>	<input type="text" value="5"/>	<input type="button" value="▲"/> <input type="button" value="▼"/>
Plus 4:	<input type="text" value="Plus4"/>	<input type="text" value="4"/>	<input type="button" value="▲"/> <input type="button" value="▼"/>
Number:	<input type="text" value="Number"/>	<input type="text" value="10"/>	<input type="button" value="▲"/> <input type="button" value="▼"/>
Pre-Directional:	<input type="text" value="PreDir"/>	<input type="text" value="2"/>	<input type="button" value="▲"/> <input type="button" value="▼"/>
Name:	<input type="text" value="Name"/>	<input type="text" value="20"/>	<input type="button" value="▲"/> <input type="button" value="▼"/>
Suffix:	<input type="text" value="Suffix"/>	<input type="text" value="10"/>	<input type="button" value="▲"/> <input type="button" value="▼"/>
Post-Directional:	<input type="text" value="PostDir"/>	<input type="text" value="2"/>	<input type="button" value="▲"/> <input type="button" value="▼"/>
PO Box:	<input type="text" value="POBox"/>	<input type="text" value="30"/>	<input type="button" value="▲"/> <input type="button" value="▼"/>
Secondary:	<input type="text" value="Secondary"/>	<input type="text" value="30"/>	<input type="button" value="▲"/> <input type="button" value="▼"/>

When an Address Splitter setup is created, these field names (and sizes if the fields don't exist in the table) will be automatically specified. If you have developed a field naming convention, entering it here will save you from ever entering it again in Address Splitter setups.

Setup: Warnings

Setup: Warnings

Before processing, Personator checks for mistakes that you may have made in your setup. You can disable these warnings here:

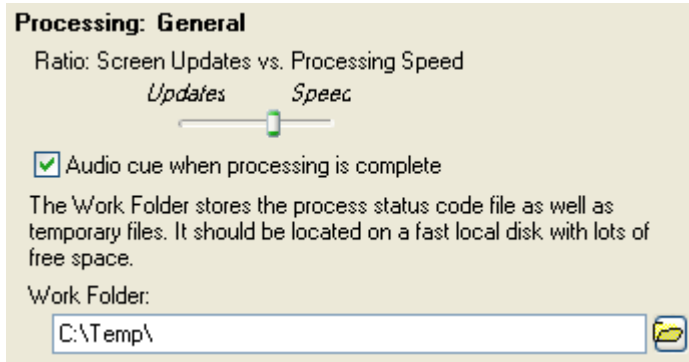
<Field> will be added to <Table>.
 <Table> will be overwritten.

Warning messages that are checked will be reported before processing. Messages that aren't checked will not.

Before processing, Personator checks for possible error and warning situations. You can suppress any or all of the warnings by unchecking it here. **NOTE:** Only *warnings* can be shut off. Errors (as opposed to warnings) are not shown here because you can not turn them off.

6.5.3 Processing

Processing: General



Ratio: Screen Updates vs. Processing Speed:

Adjust the slider to your preference. When you set for more frequent screen updates, it appears that records are being processed faster, but in reality, fewer records are being processed (because more processing cycle are being used updating the screen).

Because Windows is a multitasking environment, it is quite possible that you may be running another Windows program while processing. You will notice that faster slider settings will slow down other applications currently running, while slower slider settings will speed them up. You should choose the slider setting that works best for what's running - some programs demand more processor time than others.

The processing screen has a pause button, so if you need to have your computer's "undivided attention", you can pause Personator to do your things and then resume processing.

Work Folder The work folder stores the Key and Index files. If you are often getting "Out of disk space" warnings, you should confirm that the work folder is a Drive/folder with lots of disk space. Also, in network situations, it is desirable to use a fast local drive instead of a network drive as speed is greatly degraded by network traffic.

Processing: Status Codes

Processing: Status Codes

How should Personator record status codes? If you're not sure, choose ASCII.

- ASCII
(A=Dual Names, B=Multiple First Names, etc)
- Binary
(0x01=Dual Names, 0x02=Multiple First Names, etc)
- Hexadecimal Number
(00000001=Dual Names, 00000002=Multiple First Names, etc)
- Decimal Number
(1=Dual Names, 2=Multiple First Names, etc)

Status Codes Setups allow you to specify an Error Code field. This field can be formatted in a variety of ways:

- **ASCII** Letters are used to represent errors. If there are multiple errors, the codes are strung together.
- **Binary** Errors are stored in a packed binary format. Binary saves space, but it is difficult to read. Basically, each status code (a number) is stored in a four byte binary representation. For example, the number "12345" is stored as "90". Multiple error conditions are OR'ed together.
- **Hexadecimal Number** A series of hexadecimal digits represent the error code. Hexadecimal is a base-16 numeric representation that is familiar with programmers. Multiple error conditions are OR'ed together.
- **Decimal Number** A normal (base-10) number is used to represent error conditions. Multiple error conditions are OR'ed together.

Error Code Field Types and Sizes:

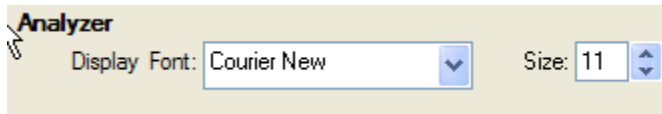
Not all formats are allowed for all field types. Additionally, some formats require a minimum size:

Format	Allowed Field Type(s)	Size
ASCII	Fixed Character or Variable Character	at least 1 (additional error conditions are lost)
Binary	Fixed Character or Variable Character (dBASE only)	4 (no more, no less)
Hexadecimal	Fixed Character or Variable Character	8 (strongly recommended)
Decimal	Fixed Character, Variable Character, Integer, Decimal, Float	11 (less if you're feeling lucky)

Error Codes:

ASCII	Binary/Hex	Decimal	Description
A	0x00000001	1	Name Splitter: Dual name detected
M	0x00000002	2	Name Splitter: Truncated Prefix 1
N	0x00000004	4	Name Splitter: Truncated First Name 1
O	0x00000008	8	Name Splitter: Truncated Middle Name 1
P	0x00000010	16	Name Splitter: Truncated Last Name 1
Q	0x00000020	32	Name Splitter: Truncated Suffix 1
R	0x00000040	64	Name Splitter: Truncated Prefix 2
S	0x00000080	128	Name Splitter: Truncated First Name 2
T	0x00000100	256	Name Splitter: Truncated Middle Name 2
U	0x00000200	512	Name Splitter: Truncated Last Name 2
V	0x00000400	1024	Name Splitter: Truncated Suffix 2
W	0x00000800	2048	Name Splitter: Truncated Full Name 2
B	0x00001000	4096	Genderizer: Multiple First Names
C	0x00002000	8192	Genderizer: No First Name
D	0x00004000	16384	Genderizer: First Name not Found
E	0x00008000	32768	Genderizer: Neutral First Name
F	0x00010000	65536	Genderizer: Misspelled First Name
X	0x00020000	131072	Genderizer: Truncated Prefix
G	0x00040000	262144	Salutation Maker: Blank/Slug Used
Y	0x00080000	524288	Salutation Maker: Truncated Salutation
H	0x00100000	1048576	Address Splitter: No Zip/Postal Code
I	0x00200000	2097152	Address Splitter: Foreign Postal Code
J	0x00400000	4194304	Address Splitter: Questionable Zip Code
Z	0x00800000	8388608	Address Splitter: Truncated City
K	0x01000000	16777216	Address Splitter: Unknown Street Address Pattern
1	0x02000000	33554432	Address Splitter: Truncated Out1/Out2/Out3
2	0x04000000	67108864	Address Splitter: Truncated Number
3	0x08000000	134217728	Address Splitter: Truncated Name
4	0x10000000	268435456	Address Splitter: Truncated Suffix
5	0x20000000	536870912	Address Splitter: Truncated Secondary
6	0x40000000	1073741824	Address Splitter: Truncated PO Box
L	0x80000000	2147483648	User Mark Personator

6.5.4 Analyzer



Display Font/Size The analyze browser's font.

Additional analyzer settings can be found in [Analyze | Options | Settings](#).

7 Additional Tools

7.1 Setup Inspector

Setup Inspector detects if you are attempting to process a file and your setup contains references to field names that do not exist in your database.

Setup Inspector

The following problems have been detected in your setup.

Items marked **Error** must be fixed before you are allowed to process. Items marked **Warning** don't need to be fixed, but may be issues that you have overlooked.

You can turn individual warnings on or off in **Tools | User Settings: Setup | Warnings**.

Warning: Prefix field PREFIX will be added to Demo1.dbf.

Warning: First Name field FIRST will be added to Demo1.dbf.

Warning: Middle Name field MIDDLE will be added to Demo1.dbf.

Warning: Last Name field LAST will be added to Demo1.dbf.

Warning: Suffix field SUFFIX will be added to Demo1.dbf.

Warning: Error Code field ERROR will be added to Demo1.dbf.

Take me to this problem!

OK (process anyway) Cancel (don't process) Help


If your setup generates an **Error**, such as referencing input fields not found in your database, Personator will not proceed with processing until this error is corrected.

If the problem generates a **Warning**, such as referencing an output field not yet found in the database, Personator can proceed with the processing.

Click **Take me to this problem!** to return to the Setup screen related to the problem to select the correct field. If the field does not exist in the database, use **Modify Structure** to add the field to the table.

7.2 View File

Allows you to view the currently open table.



FIRST	LAST	STREET
Sunny	Nyman	1634 Queens Rd.
Alex	Short	7797 Bear Creek Rd.
M	McAleer	3706 Wood Duck Rd.
Austin	Stewart	1141 Port Tack
Randolph	Abbot	5149 Live Oak Rd.
Rita	Payne	1771 Fiddlers Cove
Woody	Reeves	2128 Pinto Ct.
Hector	Hesse	4624 Headlands Dr.
Allison	Bevis	8382 Scarborough Head Rd.
T	Pitts	4072 Squire Pope Rd.
Wallace	Fennell	7087 River St.
Shelly	Tanner	2910 Windflower Ct.
Earl	Farmer	7331 Spindle Ln
Cardio	Trix	7336 Captains Cove
Brendaline	Newton	1664 Queens Grant
Karla	Lane	308 Stones Throw Dr.

Right-clicking gives the options:

- **Auto-Size Column** Change the width of a column to fit the longest string.
- **Auto-Size All Columns** Change the width of each column to fit its longest string.
- **All Columns This Size** Change the width of each column to the size of a column.
- **Reset Columns** Reset all column widths to their original sizes.

7.3 Field List

Lists the fields in the current table.

Fields shown here with a cyan background have already been used in the setup. Those with a white background have not.

When you place the mouse over a field, general information about that field is displayed at the bottom of the window:



The Field List isn't just for show, however. You can click and drag fields from the field list into input and output fields in your setup:

Name Splitter

Input: Name: NAME

Mainly Contains:

- Full Names
- Inverse Names
- Gov't Inverse Names
- Mixed First Names
- Mixed Last Names

Also Contains:

- Full Names
- Inverse Names
- Gov't Inverse Names
- Mixed First Names
- Mixed Last Names

Double Name Options:

Two Names per Field Handle 2nd name how? Split it

Remove 2nd name from Input Name field

Output Name 1:

	Size
Prefix: PRE1	10
First: FN1	20
Middle: MN1	20
Last: LN1	20
Suffix: SUF1	10

Output Name 2:

	Size
Prefix: PRE2	10
First Name: FN2	20
Middle Name: MN2	20
Last Name: LN2	20
Suffix: <None>	10
Full Name: SUF2	30

Splitter Options:

Put "." before the Suffix Split by: Logic Delimiter (Advanced!)

Error Code: <None>

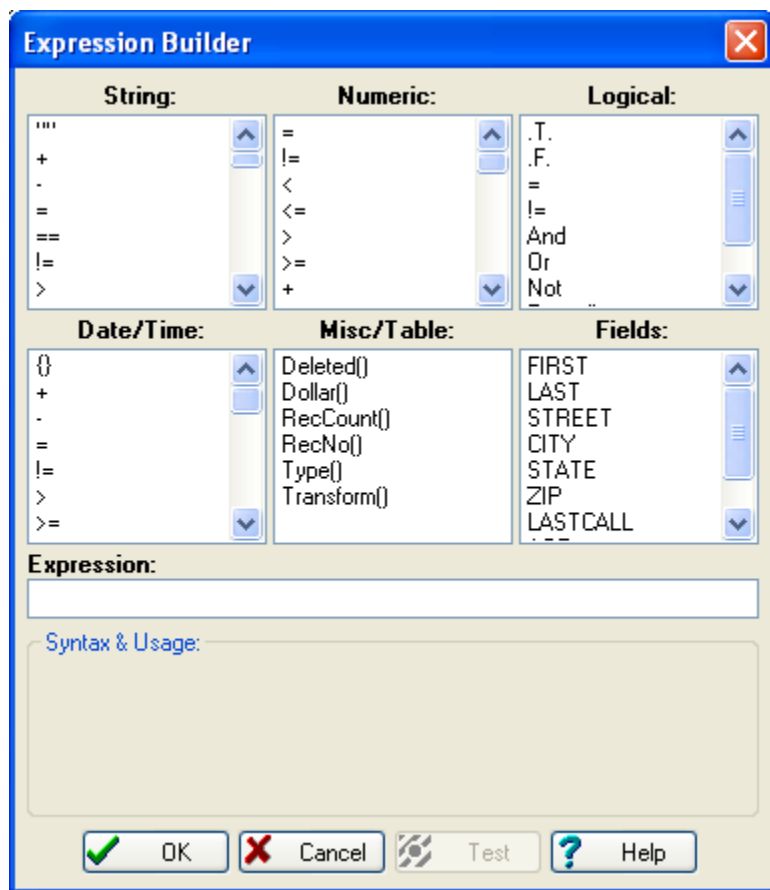
OK Cancel Help View File Field List

Field List

Click & drag the field to be mapped...

- ORIGNAME
- NAME
- PRE1
- FN1
- MN1
- LN1
- SUF1
- PRE2
- FN2
- MN2
- LN2
- SUF2
- SALUTATION
- SUF2 Fixed Character Size: 10

7.4 Expression Builder



The Expression Builder is a tool to aid you in creating dBASE expressions. Basically, you build your expression step by step. See dBASE syntax for more information on what makes up a dBASE expression. There is some overlap between some of the different data types as some functions are useful with different types.

String Available string operators and functions. Double-click a selection to insert it into **Expression**.

Numeric Available numeric operators and functions.

Logical Available logical operators and functions.

Date/Time Available date/time operators and functions.

Misc/Table Functions that are specific to table operations and/or don't really fit into any other category.

Fields This list allows you to select the fields in the current database.

Expression This area shows the expression as you build it.

Test Click this button to ensure that the dBASE expression shown is valid in syntax. This won't verify whether the expression will do what you want - only you can tell.

8 Reference

8.1 In Case of Difficulty

1. Please check the documentation first. Over half of our calls relate to information already covered here.
2. Visit our web site (www.MelissaData.com) for the newest version of the software. Version updates can be downloaded for free. Install the update in the same folder as the older version, and use your existing registration number to activate it. If you have changed the lookup tables, make sure to make backups.
3. If you're still stuck:

Technical Support: 800-MELISSA

E-Mail: tech@MelissaData.com

Fax: 949-589-5211

World Wide Web: www.MelissaData.com

Mail: Melissa Data Corporation
22382 Avenida Empresa
Rancho Santa Margarita, CA, 92688

Sales: 800-777-2460
info@MelissaData.com

8.2 Command Line Syntax

Several of Personator's options are available only from the command prompt. Most of these options are used in 'hands off' processing (what we call batch processing), while others can save you the time of selecting the same files every time you run Personator. The syntax for Personator's command prompt is:

pers32 [setupfile] [databasefile] [options]

[setupfile] The name of the setup file to use in processing. If the setup file is not in the working directory, you must specify the file's path.

[databasefile] The name of the database file to be processed. If the database file is not in the working directory, you must specify the file's path.

[options] Processing options:

- /P[printer] Print results to a printer when processing is complete. When [printer] is omitted, the Windows default printer is used. Alternately, [printer] can be numeric (i.e., /P2), which specifies the nth printer appearing on the Windows list of printers. Finally, [printer] can specify the beginning of a printer name (i.e., /PHP), which would select the first printer starting with an "HP" (such as "HP Laserjet 3"). This third technique works up to the first space in a printer's name.
- /L[file] Write the results to a log file when processing is complete. If [file] is omitted, results are written to Pers.Log in the Working Directory. Previously created Pers.Log files will be overwritten.
- /S Used in Batch Processing to set up a batch run.
- /T Used in Batch Processing to test a batch run.
- /R Used in Batch Processing to execute a batch run.

Note that with no options, specifying [setupfile] and [databasefile] will only open these files, and will not process them.

The switches are not case-sensitive and can occur in any order. "-" can be used instead of "/". Each switch must be separated by a space, however.

Using the command prompt:

In Windows 95, NT, and XP you can specify command prompt options in one of two ways:

1. Creating a new shortcut: Right click on the Desktop, select New | Shortcut. For the "command prompt", enter the desired command prompt. It is usually a good idea to specify the full path of the Personator executable. For example:

```
c:\pers\pers32.exe c:\work\file.per c:\work\file.dbf /P
```

would make Personator automatically open the demo setup file and file.dbf database. Additionally, results would be printed to the default Windows printer.

2. Running Personator from a Command Prompt. From the Start Menu, select command prompt. At the command prompt, change to the desired Working Directory and simply type the desired command prompt. Personator will be opened in a new Window. Just like you would do if Personator were a DOS program.

8.3 Batch Processing

You can run Personator completely uninterrupted from a shortcut or a command prompt. To let Personator know that you want this special capability, add one of these switches onto the end of the command prompt:

/S To create the .Per setup file
/T To test that the setup file will run when the time comes.
/R To run the setup file.

As outlined in the command prompt section, there are one or two ways to use these switches. You can exploit the DOS session method even further by using a batch file (just like in regular DOS!). The only catch to this method is that you should check the "Always Suspend" option in the shortcut's property dialog box. Why? Take the following sample batch:

```
c:\pers\pers32 c:\work\file.dbf c:\work\file.per /R  
c:\sl\sl c:\work\file.dbf c:\work\file.sl /R
```

With "Always Suspend" checked, the second line (the StyleList line) will not be executed until the first line is complete. With "Always Suspend" not checked the second line executes moments after the first line is started. Not a desirable situation when the input of the second line depends entirely on the successful completion of the first line!

NOTE: The Tools are not accessible in a batch run.

8.4 Uninstalling Personator

If at any time you need to remove Personator from your system, follow this procedure:

1. Click the Windows Start button and select Control Panel.
2. Click **Add or Remove Programs**. If you are using the classic view in the Control Panel, you may have to double-click this item.
3. Locate **Personator 4** on the list of installed programs.
4. Click **Remove**.

8.5 About Melissa Data

Thank you for using our problem-solving software for mailing lists. Our programs are designed to help people communicate more personally (and more effectively) in this increasingly computerized (and impersonal) age.

We offer these solutions to today's mailing list problems:

- **MatchUp™** combines many powerful and convenient features like letting you process files in different formats (Xbase/ASCII) and different field structures directly, saving you the time to make them uniform. Matchcodes can use any parts of any fields, and you can process up to 16 matchcodes simultaneously. Does suppression and intersection runs, parses street addresses, and offers complete, editable reports.
- **StyleList™** makes your labels and envelopes more attractive so they stand out and get opened more often. It converts Upper case to Upper/Lower case (or vice versa), expands user-definable abbreviations (or creates them), corrects punctuation, and controls field lengths.
- **Personator™** increases response rates and profit from direct mail by (1) splitting Full or Inverse name fields into Prefix, FN, MN, LN, and Suffix/Title, (2) adding correct prefix (genderizing), and (3) making perfect salutations. It simplifies merge/sort/deduplication.
- **Right Fielder™** "re-fields" badly fielded lists: distinguishes names from companies, primary from secondary address, domestic from foreign, etc. Imports "print image" and "label format" files into true databases.

For programmers, we offer several products as programming APIs:

- **MatchUp API™** Matches database records.
- **StyleList API™** Casing, abbreviating, abbreviation expansion, e-mail, phone, and zip/postal code re-formatting.
- **Personator API™** Name splitting, genderizing, salutation building, and street splitting.
- **Right Fielder API™** "re-fielding" data.

APIs are provided as 32-bit Windows DLLs. These are callable from C/C++, Visual Basic, Foxpro, and other languages that support DLL function calls.

Typical uses are:

- Real-time data entry validation.
- Enhancement of databases with custom file structures (i.e., files that cannot be exported into a format that our Windows products can readily use).
- Providing functionality for a custom written application seamlessly (i.e., without shelling to another application and with the desired look and feel).

8.6 Copyright & License Agreement

Copyright 1995-2007 Melissa Data, Inc.

This Melissa Data Corporation program ("the Software") is protected by both United States Copyright Law and International Treaty provisions.

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