

COMMUNITY DEVELOPMENT FINANCIAL INSTITUTIONS FUND

www.cdfifund.gov



CIMS3 Training

Agenda



Introduction

Application Processing



CIMS2 vs. CIMS3



- CIMS2...
 - Was intended primarily to support ONLY application processing – making and saving maps, then attaching them to applications
- CIMS3 is...
 - Intended to support all phases of the lifecycle
 - APPLICATION PROCESSING
 - Based on newest mapping and server technology
 - Quick, responsive, scalable, and usable
 - Relatively easy to extend to meet new and changing business needs
 - Multiple configurations to support each phase of the lifecycle

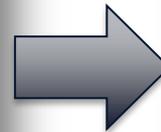
APPLICATION PROCESSING

APPLICATION PROCESSING



- Application Processing intended to support the making, saving, and attaching of maps to signature pages and for use in related application / certification activities.
- Go to https://www.cdfifund.gov/what_we_do/mapping.asp and click the “myCDFIFund” button
- This time, login from myCDFIFund:

The screenshot shows the myCDFI-Fund website interface. It includes a navigation bar with 'Home' and 'Help' buttons. The main content area is divided into sections: 'CDFI Home Page', 'Announcements & Helpful Tips' (with three bullet points), 'myCDFI Login' (with fields for 'E-mail:' and 'Password:' and a 'Login' button), and 'User Registration' (with three bullet points: 'I do not already have a user account with myCDFI', 'I already have a user account but do not know my password.', and 'I need help with setting up my user account.').



- One for each of the following:
 - CDFI Program,
 - BEA Program,
 - NMTC Program,
 - NACA Program embedded in CDFI Certification and BEA instances

APPLICATION PROCESSING



- Logging In:
 - Provide your username and password
 - Select an Organization
 - Enter your EIN
 - Select the “Mapping”

Enter The EIN

EIN:

myCDFI-Fund Home Help

▼ CDFI Home Page

Announcements & Helpful Tips

- ▶ All myCDFI users have the ability to register for workshops and information sessions that the CDFI Fund and its program components hold annually around the country.
- ▶ To gain access to an organizations myCDFI account, you must first have a user account. You can register as a user
- ▶ You can register to become a reviewer for program applications through myCDFI. Selected reviewers help read and review applications submitted to the CDFI Fund for allocations, grants, loans and technical assistance

myCDFI Login

E-mail:

Password:

User Registration

- ▶ I do not already have a user account with myCDFI.
- ▶ I already have a user account but do not know my password.
- ▶ I need help with setting up my user account.

- ▼ Organization Home
- ▶ Organization Profile
- ▶ Applications
- ▶ Mapping

APPLICATION PROCESSING



- CIMS3 Homepage

- Select a Program
 - CDFI
 - BEA
 - NMTC

Logged in as: jappleseed@penbay.com

Welcome to CIMS, the CDFI Fund Information and Mapping System



This system is designed to help CDFI Fund customers map their target markets, Low Income Communities, or Distressed Communities for submission with CDFI applications.

For more information about CIMS, please feel free to contact the CDFI Fund's IT HelpDesk by email at ITHelpDesk@cdfi.treas.gov, or by phone at (202) 653-0300.

To start a new map or to view and edit an existing map, please choose the program that you are interested in below:

[CDFI Maps](#)

Create and edit maps for the CDFI program.

[BEA Maps](#)

Create and edit maps for the BEA program

[NMTC Maps](#)

Create and edit maps for the NMTC program

PREPARATION



- Basic Navigation: When the viewer loads...

The screenshot displays the CIMS CDFI Public Viewer interface. On the left, a navigation panel includes a compass, zoom in (+) and zoom out (-) buttons, a hand icon for panning, and a search icon. A green header bar at the top contains the text "CIMS CDFI Public Viewer CDFI". A "Help" menu is open, listing "Help", "About", and "Request Help". A search dropdown menu is visible, showing "Knox" in the search bar and a list of results under "County (9)", including "State: Illinois Knox County", "State: Indiana Knox County", "State: Kentucky Knox County", "State: Maine Knox County", and "State: New York Knox County". A "Layers" panel is open, showing a list of map layers with checkboxes: "2010 Census Tract All" (checked), "Congressional District No Labels", "County No Labels", "MSA", "State", and "CDFI Headquarters". The main map area shows a topographic view of the United States with various geographical features and city labels.

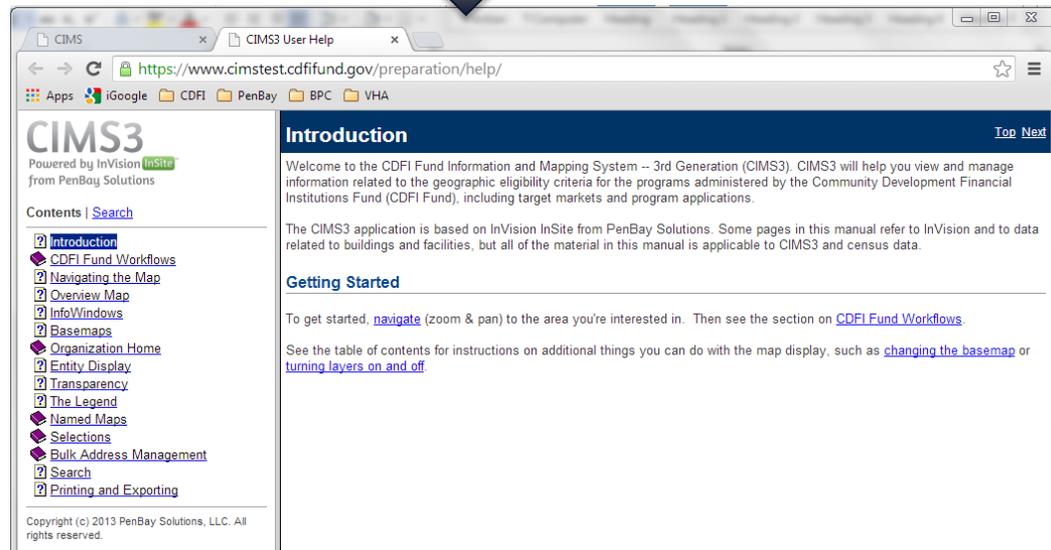
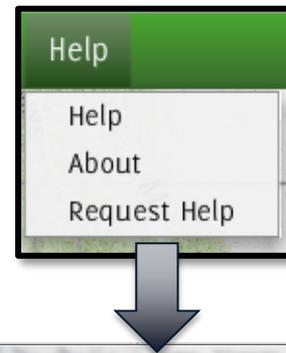
PREPARATION



- Navigation Tools



Menus



PREPARATION

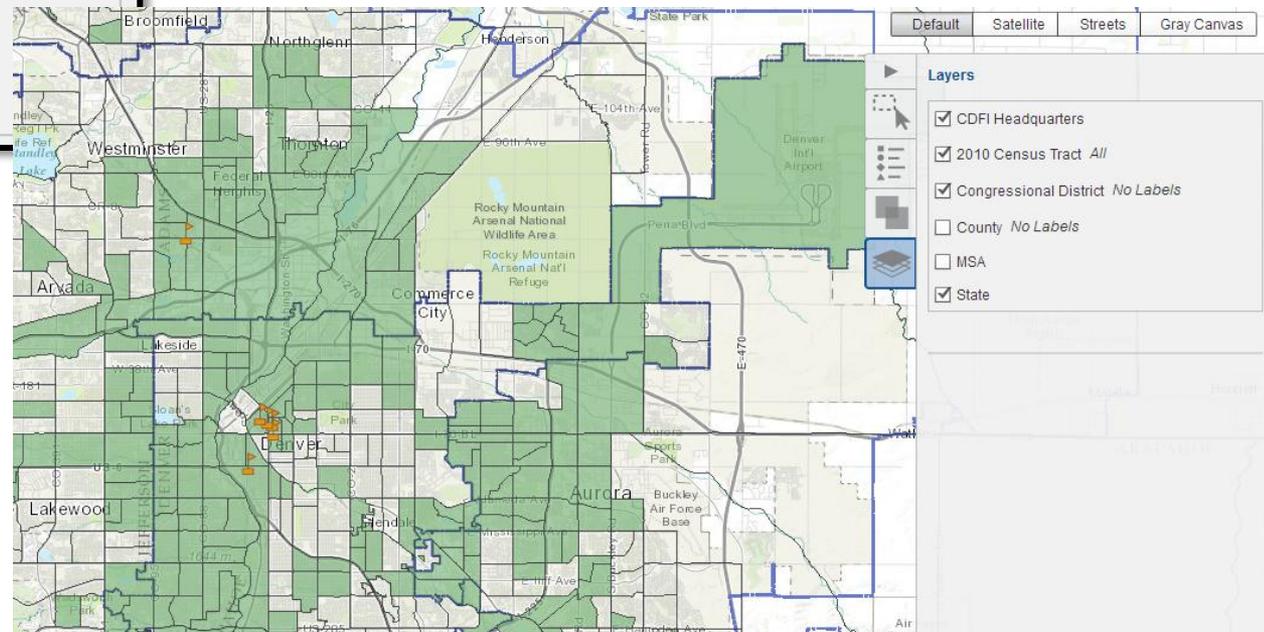


- Control Layer Visibility



Layers

- 2010 Census Tract *All*
- Congressional District *No Labels*
- County *No Labels*
- MSA
- State
- CDFI Headquarters



Default Satellite Streets Gray Canvas

Layers

- CDFI Headquarters
- 2010 Census Tract *All*
- Congressional District *No Labels*
- County *No Labels*
- MSA
- State

PREPARATION



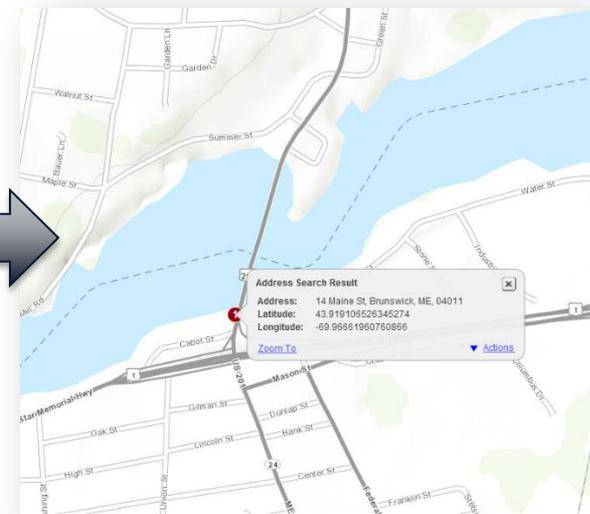
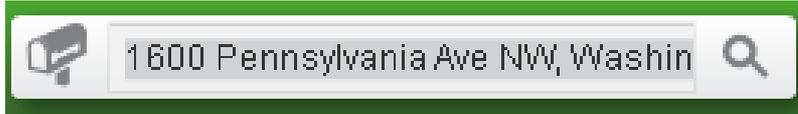
- View the Legend



PREPARATION



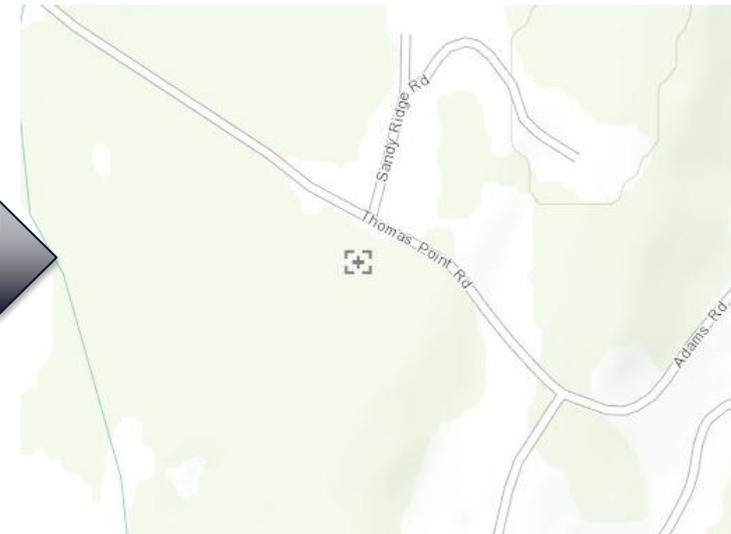
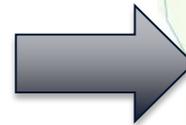
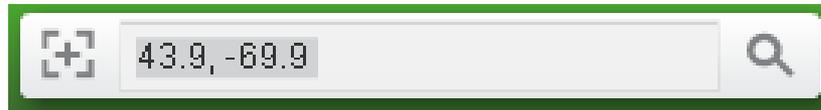
- Search By Address



PREPARATION



- Search by Latitude / Longitude

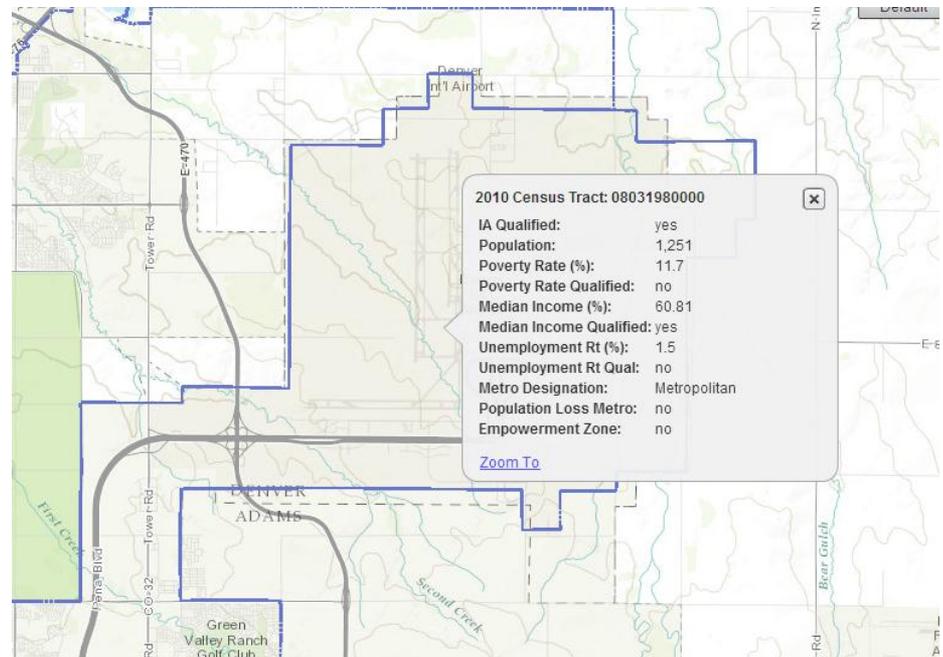
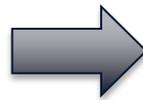
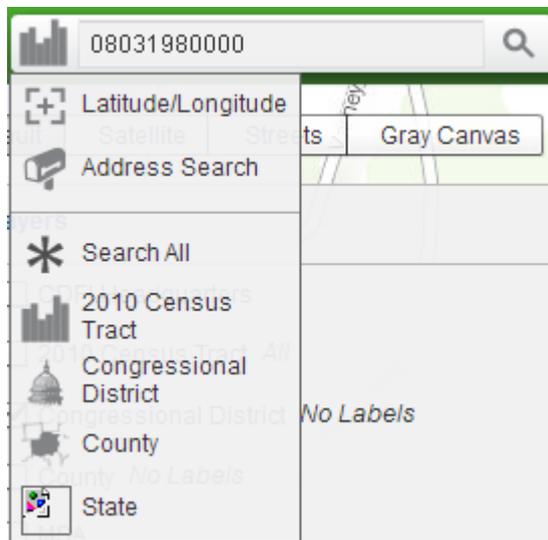


X should be greater than -180 or less than 180 AND Y should be greater than -90 or less than 90.

PREPARATION



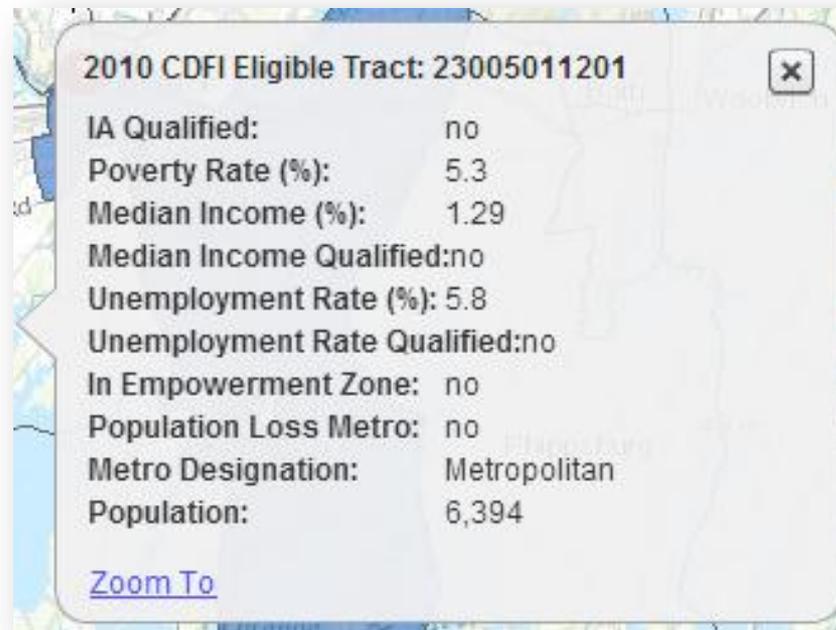
- Search by Entity Type



Common Search Types: Census Tract, County, State, Congressional District



- Inspecting Features (i.e., InfoWindows)

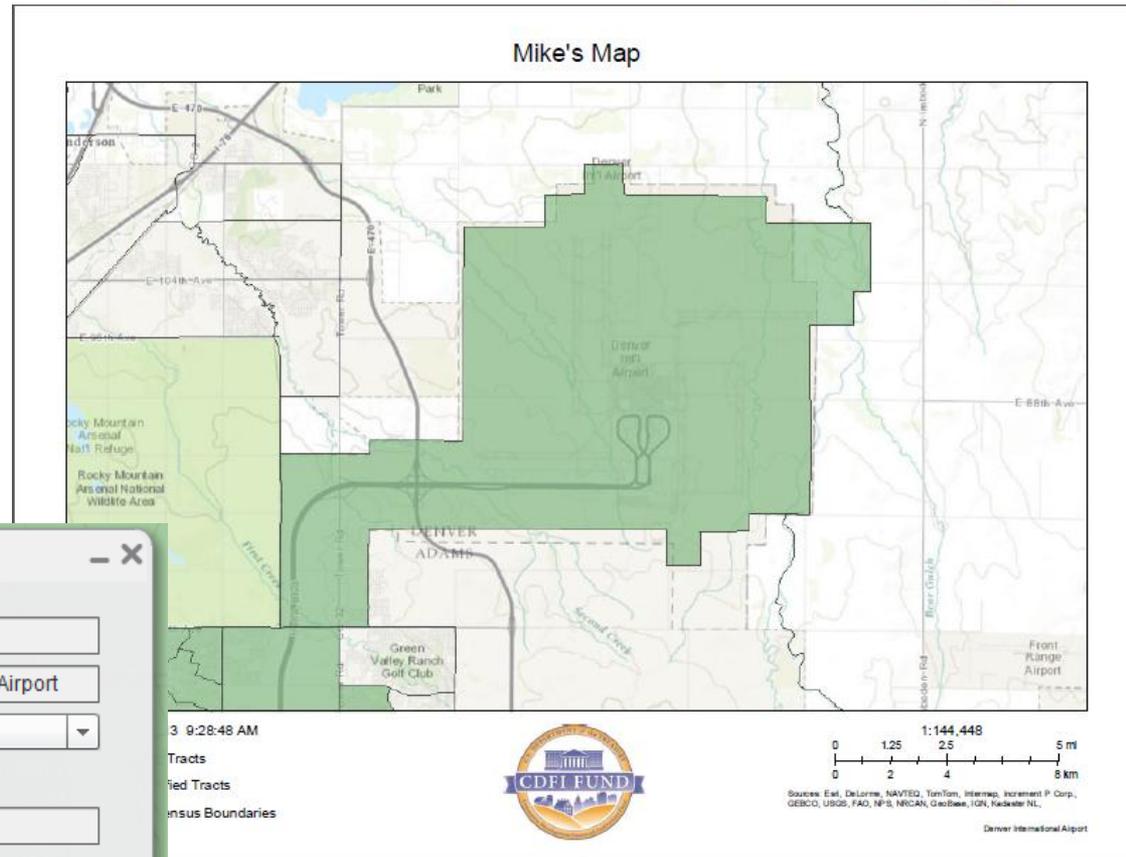
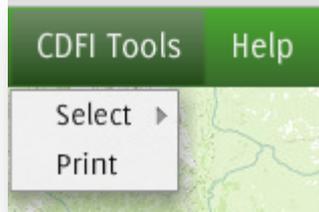


- InfoWindows Come Up when you search for an entity type or click on the map

PREPARATION



- Printing



Please Note: Pop-up blocker must be disabled to print from CIMS3!

APPLICATION PROCESSING



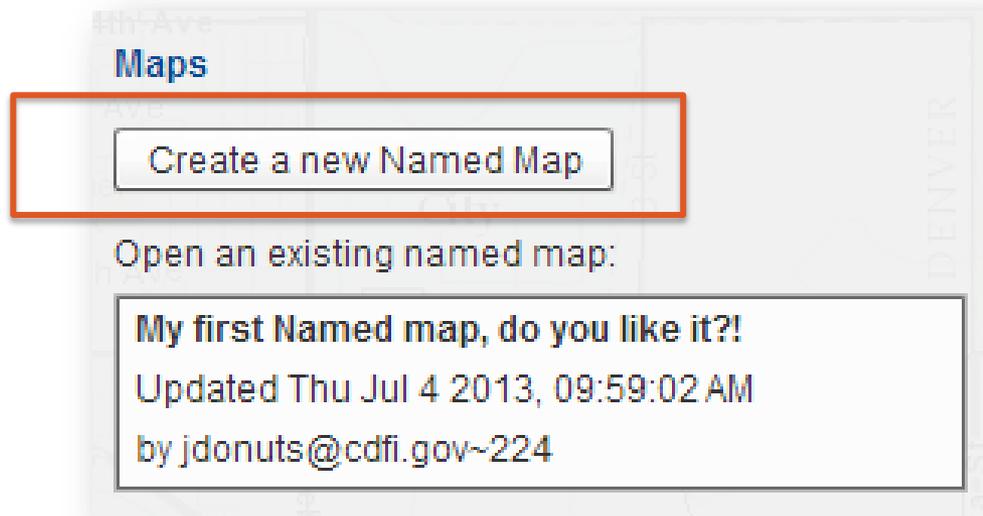
- List Named Maps



APPLICATION PROCESSING



- Create a New Named Map

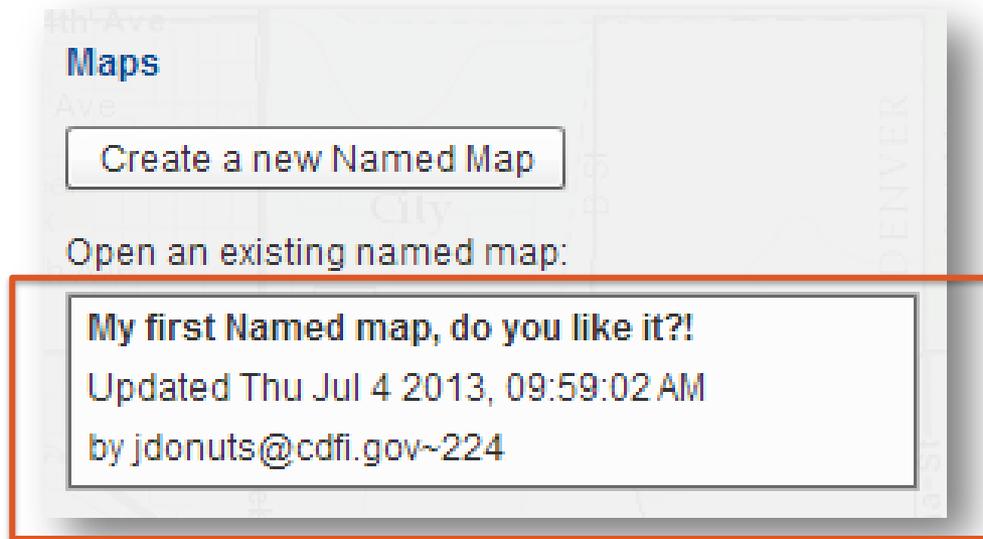


- Note: Creating a Map Will NOT open it. You have to open it!

APPLICATION PROCESSING



- Open A Named Map



- When new map is opened, no zoom or selection occurs
- When existing map is opened, map zooms to selected features

APPLICATION PROCESSING



- Draw to Select

The screenshot displays a GIS application interface. On the left, a "Draw to Select" tool window is open, showing various drawing tools (point, line, polygon, etc.) and a "Selection Method" section with radio buttons for "Replace", "Add", and "Subtract". The "Replace" method is selected. Below this, a list contains a checked item: "2010 NMTC Eligible Tract". A note at the bottom of the tool window states: "Gray / italicized entity types cannot be selected because the entity type is not visible in the map".

The main map area shows a geographic region with various features. A "2010 Census Tracts (14)" layer is active, with several tracts highlighted in green. The map includes labels for locations like Frederick, Fort Lupton, Hudson, Henderson, and Rocky Mountain Arsenal National Wildlife Area. A toolbar on the right includes a "Draw to Select" button, a "Query to Select" button, and a "Selection Grid View" button. The "Draw to Select" button is currently active, indicated by a mouse cursor over it.

APPLICATION PROCESSING



- Selection Grid View

Selections

Draw to Select Query to Select Selection Grid View

2010 Census Tracts (14)

Census Tra...	ACS Pop...	IAQualifi...	Poverty ...	Unemplo...	Median I...	In Empowe...
08001008901						
08001009502						
08001009553						
08001009606						
08001009607						
08001009751						
08001009752						
08001015000						
08031000102						
08031000201						
08031000202						
08031001500						
08031003500						
08031015400						

Selection Grid View

2010 Census Tracts

Export to CSV

Census Tra...	ACS Pop...	IAQualifi...	Poverty ...	Unemplo...	Median I...	In Empowe...
08001008802	4,255	yes	22.6	14.1	0.65	no
08001008901	2,377	yes	28.8	22.5	0.49	no
08001009002	8,497	yes	19	13.3	0.64	no
08001009306	3,612	yes	20	11.8	0.74	no
08001009307	3,312	yes	12.6	10.6	0.65	no
08001009308	3,725	yes	14.3	5.4	0.55	no
08001009309	3,880	yes	21	13.4	0.75	no
08001009310	5,566	yes	28.8	7.1	0.6	no
08001009501	3,014	yes	21.7	10.8	0.62	no
08001009502	4,177	yes	19.6	12.8	0.57	no
08001009553	2,995	yes	13.4	6.2	0.68	no

Also can click “Export to CSV” to save grid to desktop for use in Excel, Access, etc.

APPLICATION PROCESSING



- Query to Select

A screenshot of a "Query to Select" dialog box. The dialog has a title bar with a question mark icon and a close button. The "Select:" dropdown is set to "2010 Census Tract". There are three radio buttons for "Visible Floors", "All Floors", and "Current map extent only" (which is selected). Below that are three radio buttons for "Selection Method": "Replace" (selected), "Add", and "Subtract". The main area contains seven rows of search criteria, each with a dropdown menu and input fields. The "ACS Population" row has values "1000" and "2000". The "Reset" button is on the bottom left, and the "Replace current selection" button is on the bottom right.

Field	Operator	Value 1	Value 2
Census Tract FIPS	Contains		
ACS Population	Between	1000	2000
IAQualified	Contains		
Poverty Rate	Between		
Unemployment Rate Pct	Between		
Median Income Pct	Between		
In Empowerment Zone	Contains		

APPLICATION PROCESSING



- Validate Selections Against Program Rules

<p>Selections</p> <p>Draw to Select Query to Select Selection Grid View</p> <p>▶ <input checked="" type="checkbox"/> 2010 CDFI Eligible Tracts ▼ Actions</p> <p>▶ <input checked="" type="checkbox"/> 2000 CDFI Eligible Tracts</p> <p>Validate Target Market</p> <p>Clear All Selection Results</p>	<p>Sample Qualified GUC Analysis Report (CDFI Program)</p> <p>Analysis</p> <ul style="list-style-type: none">• All tracts are qualified.• The tracts are all in the same county.• The tracts are contiguous.• Population: 20,980• The population meets the requirement of 4,000 in a metro area.• The poverty rate is at least 30%.• The unemployment rate is at least 1.5 times the national average. <p>Qualified</p>	<p>Sample Non-Qualified GUC Analysis Report (CDFI Program)</p> <p>Analysis</p> <ul style="list-style-type: none">• 16 tracts are not qualified.• The tracts are not all in the same county.• The tracts are contiguous.• Population: 67,409• The population meets the requirement of 4,000 in a metro area.• The poverty rate is below 30%. <p>Not Qualified</p>
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APPLICATION PROCESSING



- Save a Map (including its selections)

A screenshot of a web application interface. At the top, a 'Maps' panel shows a 'Save' button highlighted with a red box. Below it, a 'Revisions' section is visible. A large grey arrow points from the 'Save' button to a 'Save map' dialog box. The dialog box has a 'Revision Comment' text area. At the bottom, a checkbox labeled 'Associate my map with an application' is highlighted with a red box, with a note below it: 'Note: Once your map is associated an application, the map can no longer be edited.' The dialog also contains 'Save' and 'Cancel' buttons.

APPLICATION PROCESSING



- View Revisions to a Map

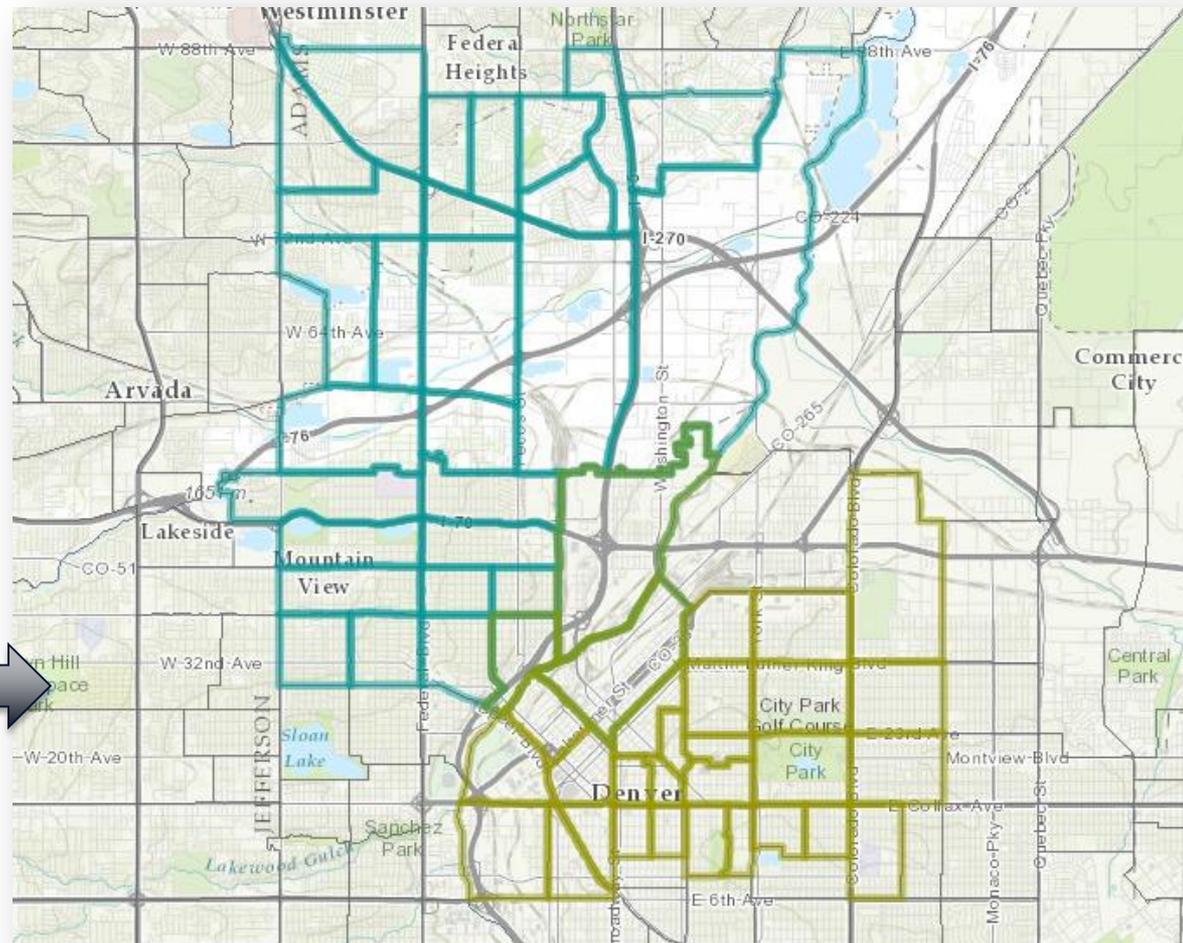
Maps

[Back to List](#)

Jamie
Program: CDFI
Status: open
Updated Mon Oct 21 2013, 10:26:58 PM
by michael.mcdonald@cdfi.treas.gov

Revisions

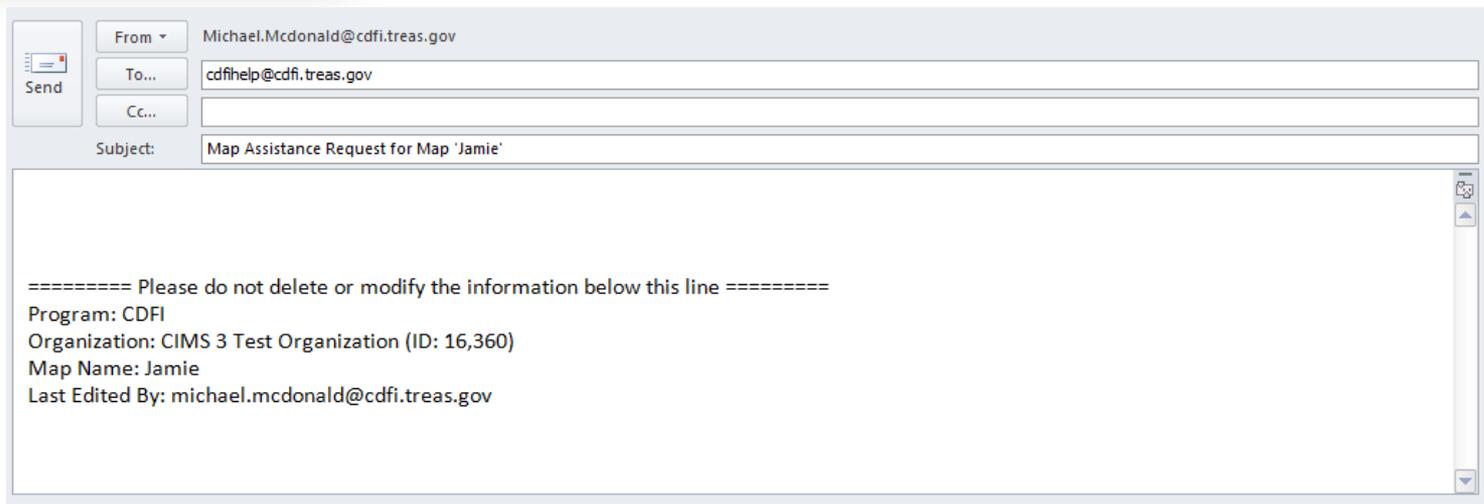
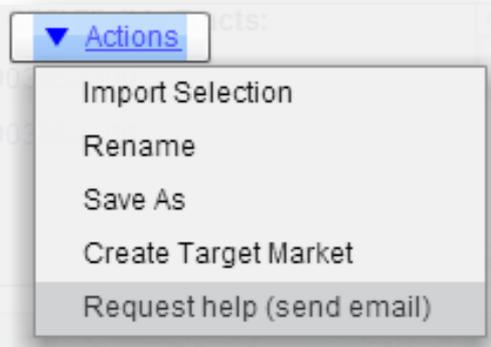
Mon Oct 21 2013, 10:25:00 PM



APPLICATION PROCESSING



- Request Help with a Named Map



APPLICATION PROCESSING



- Attaching a Map to a Signature Page

A screenshot of a "Save map" dialog box. The dialog has a title bar with "Save map" and a close button. Below the title bar is a "Revision Comment:" label followed by a text input field. Below the text field is a checkbox labeled "Associate my map with an application". Underneath the checkbox is a note: "Note: Once your map is associated an application, the map can no longer be edited." At the bottom of the dialog are two buttons: "Save" and "Cancel". A red rectangular box highlights the checkbox and the note below it.

APPLICATION PROCESSING



- Attaching a Map to a Signature Page

A screenshot of a "Save map" dialog box. The dialog has a title bar with "Save map" and a close button. It contains a "Revision Comment:" text box. Below that is a checked checkbox labeled "Associate my map with an application". A note follows: "Note: Once your map is associated an application, the map can no longer be edited." There are two sections: "Select Application Signature Page" with a dropdown menu showing "BEA Application for 2014", and "Select Targeted Population" with a list of checkboxes for various population categories. At the bottom are "Save" and "Cancel" buttons.

Save map

Revision Comment:

Associate my map with an application

Note: Once your map is associated an application, the map can no longer be edited.

Select Application Signature Page

BEA Application for 2014

Select Targeted Population

- Low Income Targeted Population
- Other Targeted Population (OTP) - Native American
- Other Targeted Population (OTP) - Alaska Native
- Other Targeted Population (OTP) - Asian American
- Other Targeted Population (OTP) - Hispanic / Latino
- Other Targeted Population (OTP) - Native American
- Other Targeted Population (OTP) - Native Hawaiian
- Other Targeted Population (OTP) - Women
- Other Targeted Population (OTP) - Other Pacific Islander
- Other Targeted Population (OTP) - Other
- Severely Distressed Non-Metropolitan Area

Save Cancel

APPLICATION PROCESSING



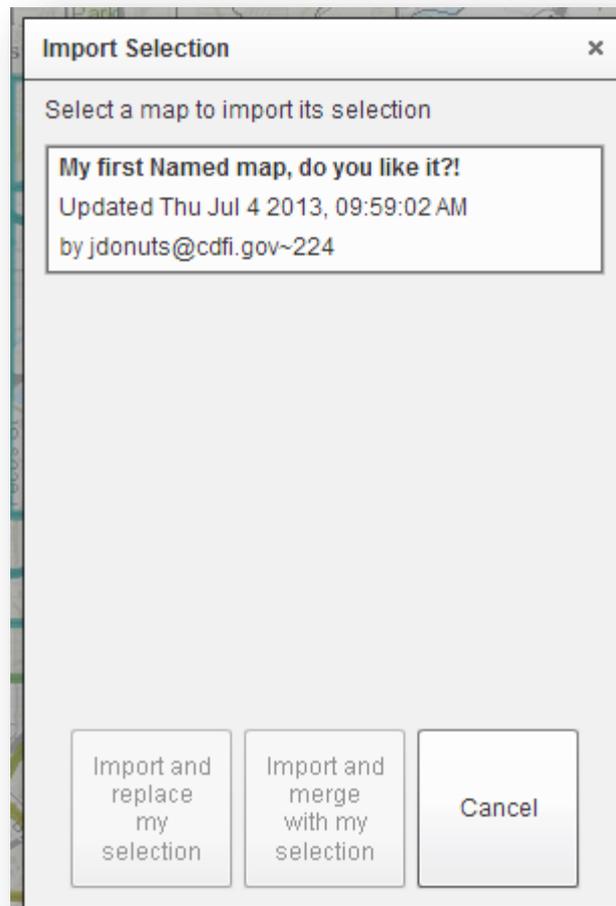
- Map Statuses
 - Open: Can be edited and saved many times (i.e., revisions)
 - Submitted: Has been attached to a signature page; can no longer be edited.

A screenshot of a web application interface for map processing. The interface includes a "Maps" section with a "Back to List" link and a "Save As" button. Below this, the name "Mike" is displayed, followed by "Program: CDFI". A red rectangular box highlights the text "Status: submitted". Below the status, it shows "Updated Tue Aug 6 2013, 11:47:26 AM" and "by jappleseed@penbay.com". At the bottom, there is an "Actions" button with a dropdown arrow. The background of the interface shows a map of a park area.

APPLICATION PROCESSING



- Merge the Contents of Two Named Maps



Getting Help



- Web-based Application Help
- Submit Feedback Link
- Request Help with a Named Map
- CDFI Helpdesk

Questions?