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Bulk Address Geocoding AMIS Training Manual

June 2022

Table of Contents

Bulk Address Geocoding 3
How to View and Export the Geocoding Report (Alternate Method) 10
Bulk Address Geocoding in AMIS – Training Video 12

Table of Figures

Figure 1. Menu Dropdown 3
Figure 2. Search Function on TLR Page 3
Figure 3. Lookup Window 4
Figure 4. Recently Viewed Organizations 4
Figure 5. Selected Organization 4
Figure 6. Import/Export Page 5
Figure 7. Sample CSV File 5
Figure 8. Sample Completed CSV File 6
Figure 9. Import Geocoding Address Data Link 6
Figure 10. Geocoding Data File Upload Page 6
Figure 11. Sample File Selected 7
Figure 12. File Validation 7
Figure 13. Successful Upload 7
Figure 14. View GeoCoding Data Records 8
Figure 15. GeoCoding Detail Page 8
Figure 16. GeoCoding Data Report Link 8
Figure 17. Export Details on Report Page 9
Figure 18. Export Button 9
Figure 19. Sample Exported File 10
Figure 20. Home Page - Organization Tab 10
Figure 21. Organization Page - Organization Name 11
Figure 22. Details Page - GeoCodingData FIPS Export Link 11
Figure 23. GeoCoding Data Number Link 11
Figure 24. Export Button 11

Bulk Address Geocoding

Note: In order to access the bulk address geocoding function in AMIS, you must be a user with an organization in AMIS.

1. In AMIS, open the dropdown on the right-hand side of the page. Select TLR Import/Export Certify Page.

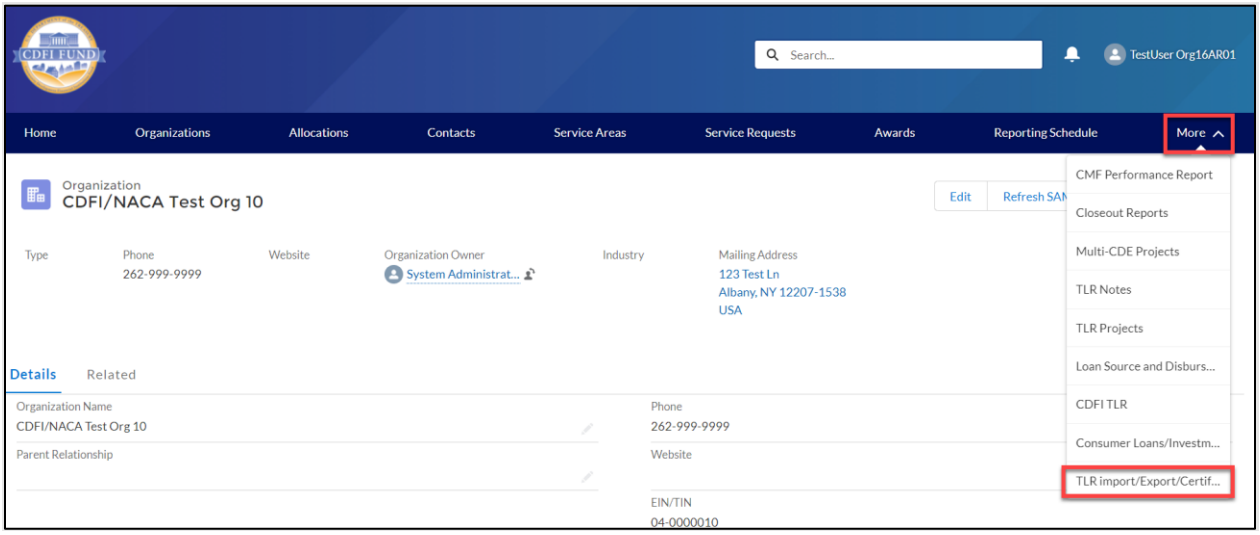


Figure 1. Menu Dropdown

2. On the TLR Import/Export Certify page, search for the organization by clicking on the magnifying glass icon.

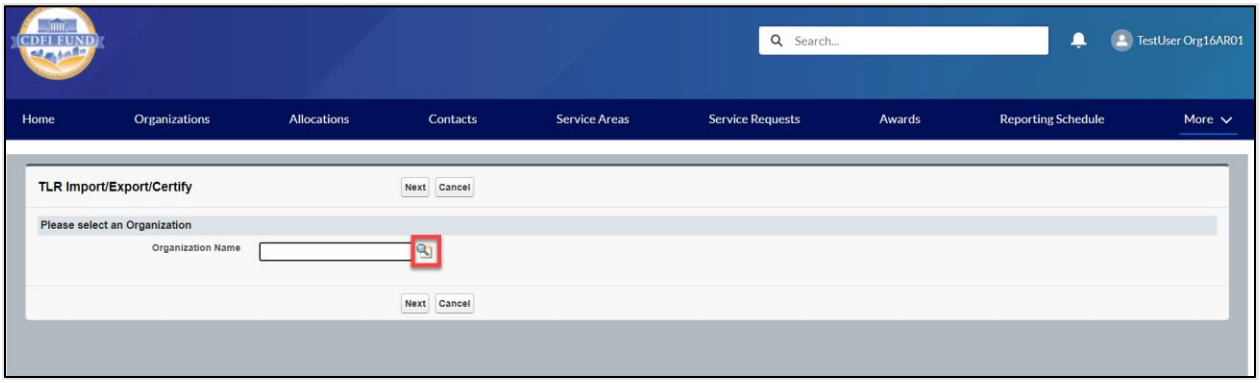


Figure 2. Search Function on TLR Page

3. A Lookup page will open. You can enter the full or partial organization name in the search box and click the Go! button to see search results. Remember to use the "*" wildcard for partial searches.

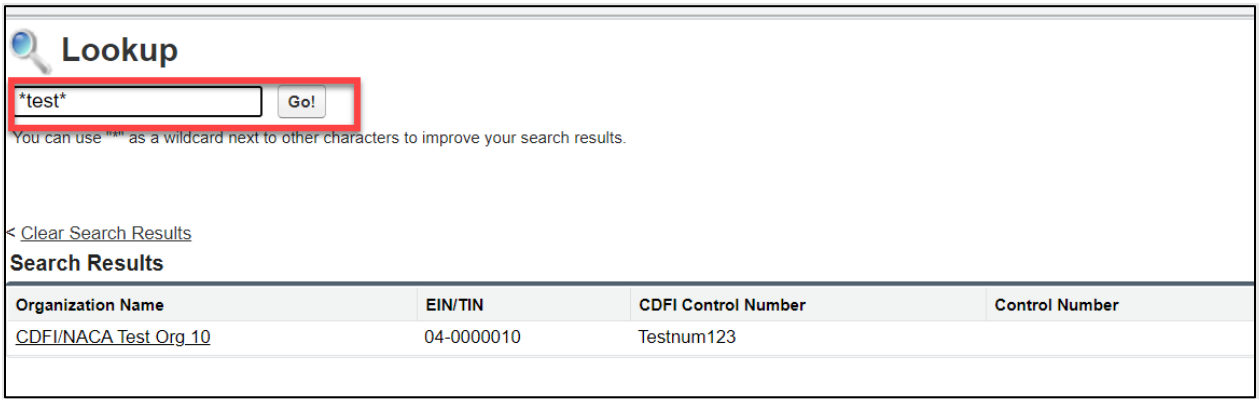


Figure 3. Lookup Window

4. If you have recently viewed an organization, it will appear in the Recently Viewed Organizations section of the page. Click the organization name to select the organization for bulk address import.

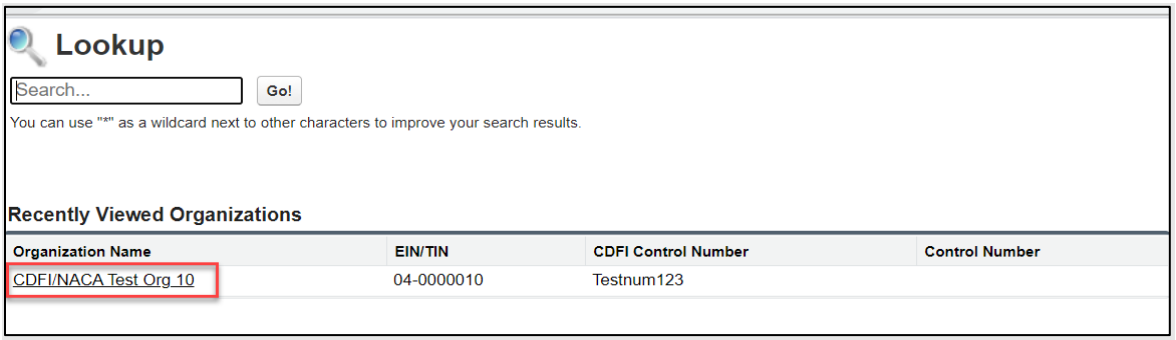


Figure 4. Recently Viewed Organizations

5. The organization name will be selected. Click Next.

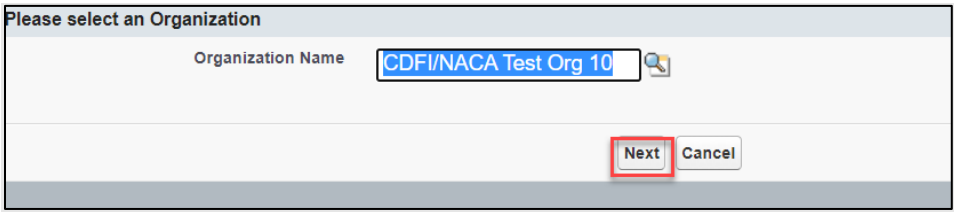


Figure 5. Selected Organization

6. The import/export page for the selected organization will be displayed. Click the **New_GEOCODING_Address.csv** link under the CDFI CSV section of the page.

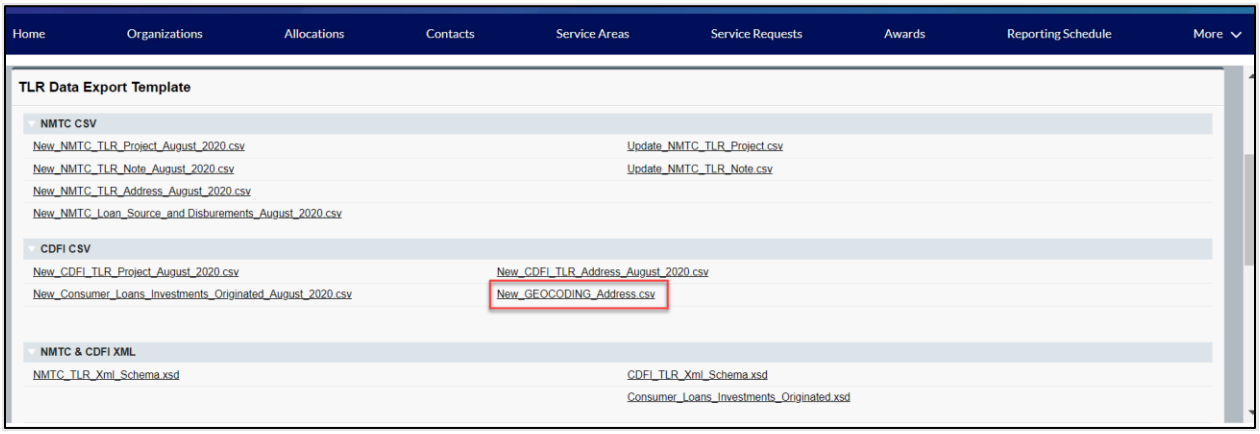
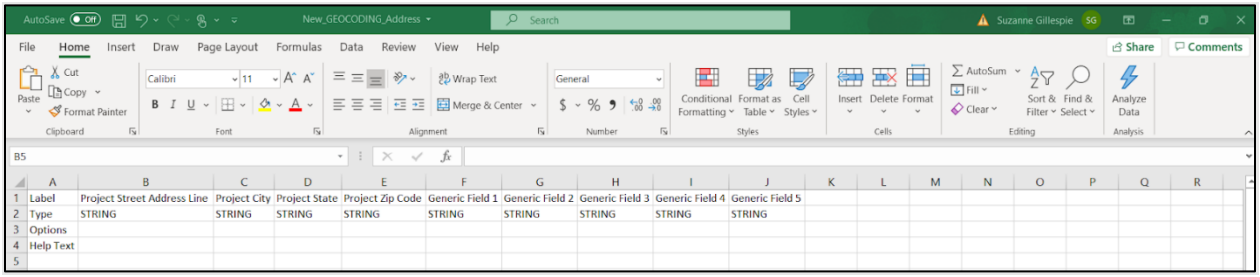


Figure 6. Import/Export Page

7. Excel will open a bulk address import file. This is the file that will need to be updated with the address entries for each import. The file includes the following text fields:

   - Label
   - Project Street Address Line
   - Project City
   - Project State
   - Project Zip Code
   - Generic Field 1
   - Generic Field 2
   - Generic Field 3
   - Generic Field 4
   - Generic Field 5

8. The five generic fields may contain any data the user wants included in the geocoding output results for that address entry, or can be left blank.



	A	B	C	D	E	F	G	H	I	J
1	Label	Project Street Address Line	Project City	Project State	Project Zip Code	Generic Field 1	Generic Field 2	Generic Field 3	Generic Field 4	Generic Field 5
2	Type	STRING	STRING	STRING	STRING	STRING	STRING	STRING	STRING	STRING
3	Options									
4	Help Text									
5										

Figure 7. Sample CSV File

9. Start to enter the addresses to be geocoded on line five of the template.

***NOTE:** Please remove all accents and special characters from addresses prior to entering into the template to avoid errors.

	A	B	C	D	E	F	G	H	I	J	K
1	Label	Project Street Addr	Project City	Project Sta	Project Zip Code	Generic Fie	Generic Fie	Generic Fie	Generic Fie	Generic Field 5	
2	Type	STRING	STRING	STRING	STRING	STRING	STRING	STRING	STRING	STRING	
3	Options										
4	Help Text										
5		49 Craggy Pt	Cashiers	NC	28717						
6		578 Oak Park Circle	Jackson	MS	39208						
7		360 Liberty St	Canton	MS	39046						
8		100 Shoreline Dr	Madison	MS	39110						
9		132 Parker Ln	Benton	MS	39039						
10		2765 County Rd 24	Newton	MS	39345						
11		206 S Church St	Louisville	MS	39339						
12		308 E Pearl St	Jackson	MS	39201						
13		731 W Melrose	Chicago	IL	60657						

Figure 8. Sample Completed CSV File

10. Once all the entries have been made, save the as a CSV file and return to the organization import/export page. Click the **Import New GEOCODE Address Data** link in the TLR Data Import Links section.

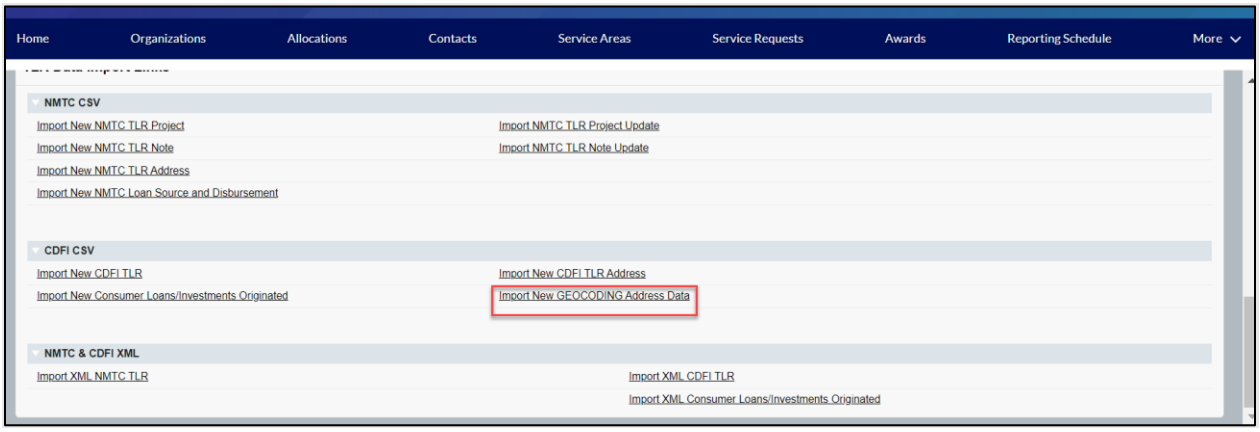


Figure 9. Import Geocoding Address Data Link

11. The GeoCoding Data File Upload page will display. Click the “Add Files…” button.

Figure 10. Geocoding Data File Upload Page

12. Browse for the import file and select it.

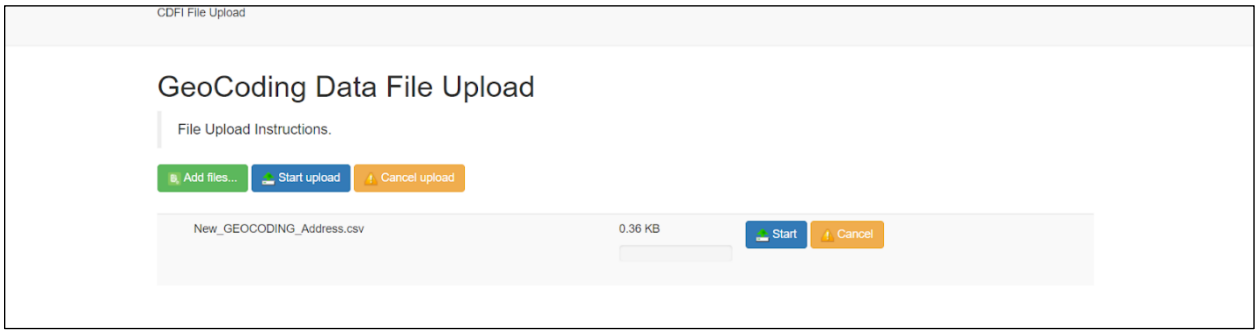


Figure 11. Sample File Selected

13. The file will display on the Upload page. Click the Start upload button. The system will validate the address entries and notify you if there are any errors in your data.

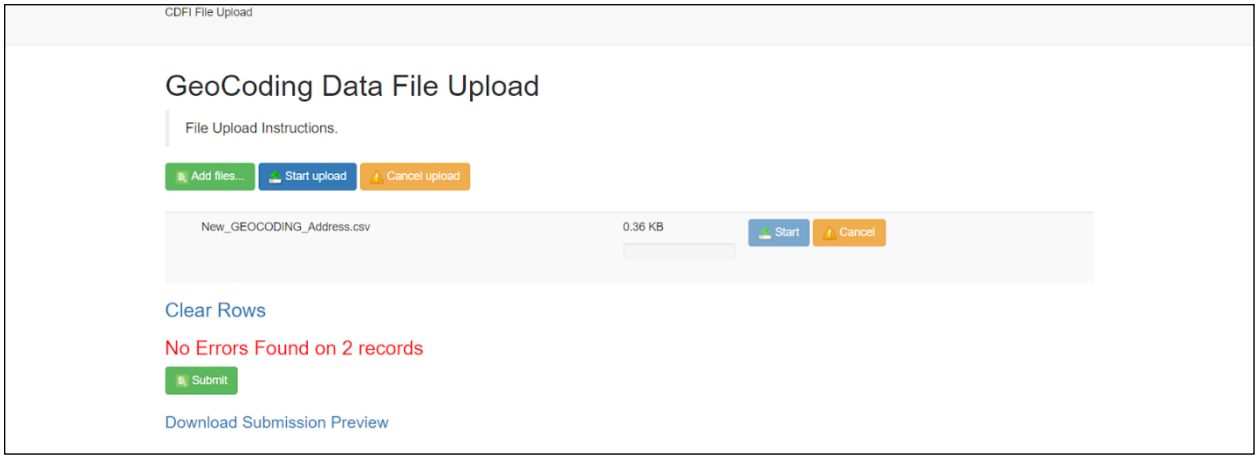


Figure 12. File Validation

14. Click the Submit button to begin the upload process.

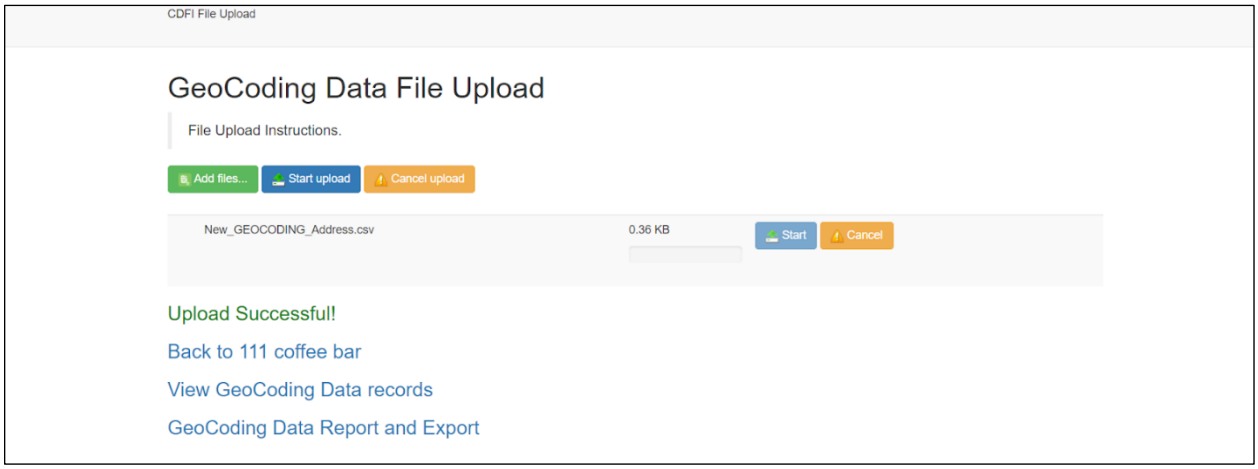


Figure 13. Successful Upload

15. Select the **View GeoCoding Data records** link to view your results. An entry will exist for each entry successfully geocoded. Click on a data result.

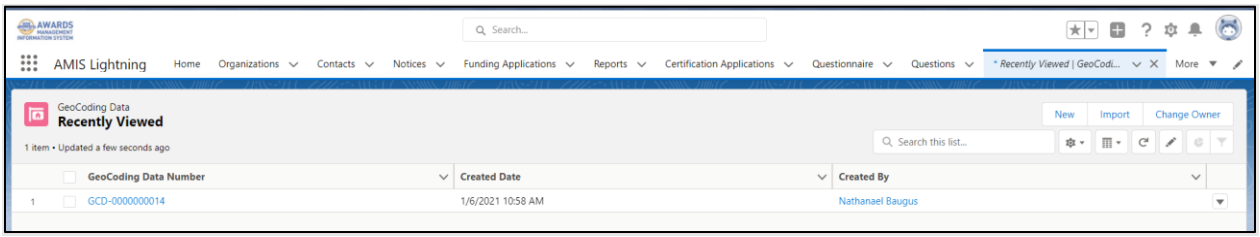


Figure 14. View GeoCoding Data Records

16. The detailed results for that address entry will display.

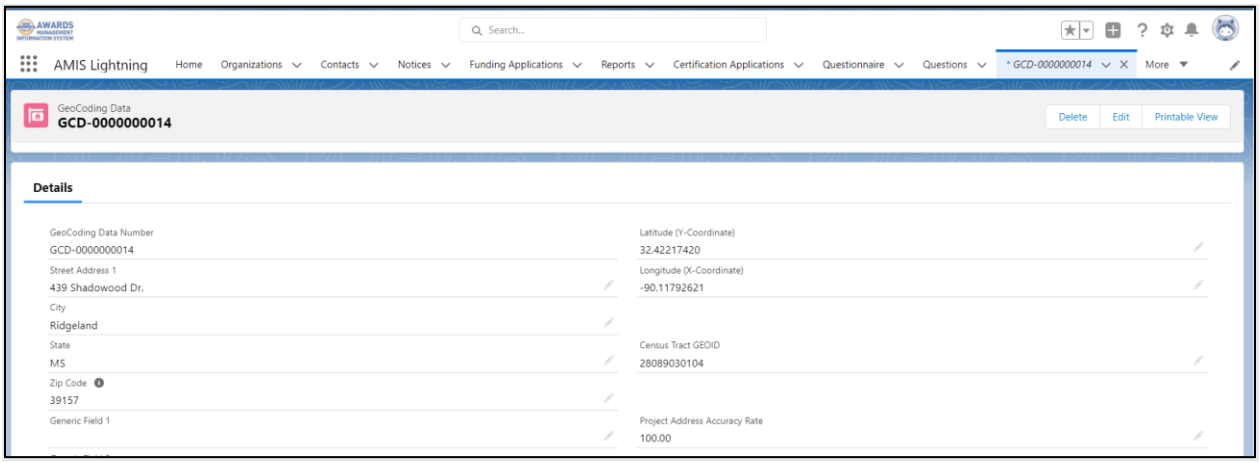


Figure 15. GeoCoding Detail Page

17. Select the **GeoCoding Data Report and Export** link. User access to object data will be via report only.

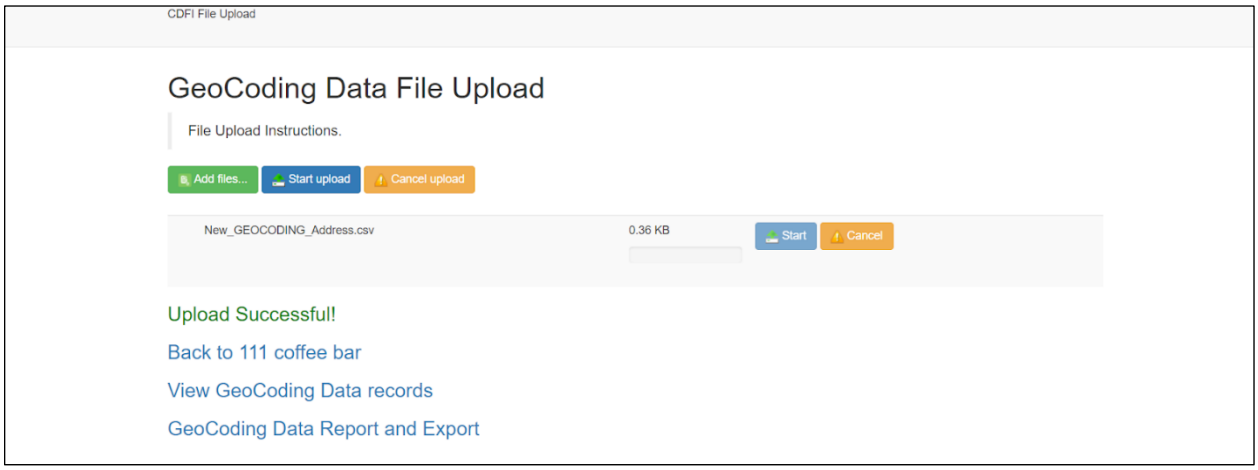


Figure 16. GeoCoding Data Report Link

18. The GeoCodingData FIPS Export Report page will display.

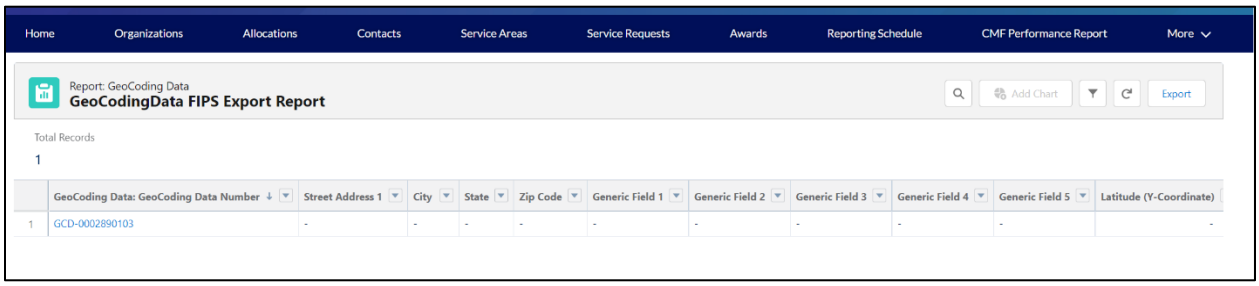


Figure 17. Export Details on Report Page

19. Click the Export button.

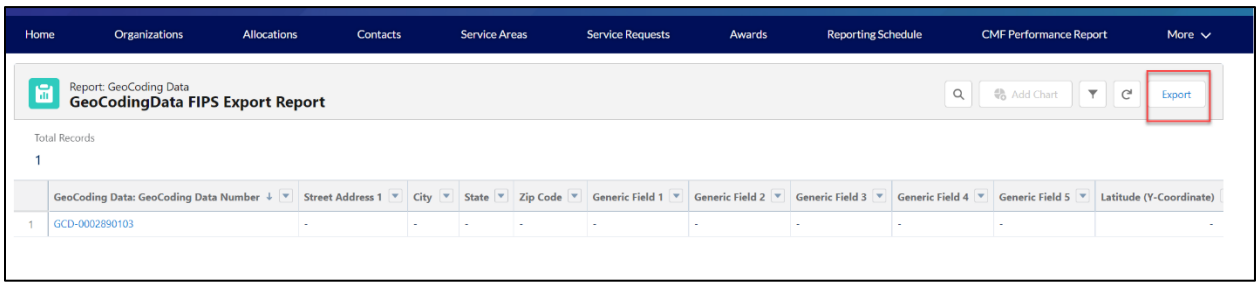
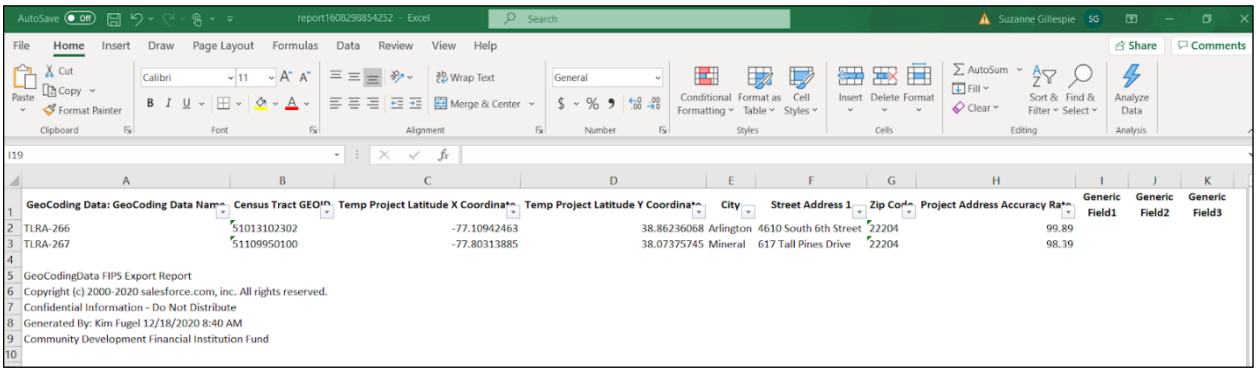


Figure 18. Export Button

20. The geocoding output will be exported to Excel. The output will include the following fields:

- GeoCoding Data: GeoCoding Data Name
- Census Tract GEOID
- Temp Project Latitude X Coordinate (up to 8 decimal places)
- Temp Project Latitude Y Coordinate (up to 8 decimal places)
- City
- Street Address 1
- Zip Code
- Project Address Accuracy Rate
- Generic Field 1
- Generic Field 2
- Generic Field 3
- Generic Field 4
- Generic Field 5



GeoCoding Data: GeoCoding Data Name	Census Tract GEOID	Temp Project Latitude X Coordinate	Temp Project Latitude Y Coordinate	City	Street Address 1	Zip Code	Project Address Accuracy Rate	Generic Field1	Generic Field2	Generic Field3
TLRA-266	51013102302	-77.10942463	38.86236068	Arlington	4610 South 6th Street	22204	99.89			
TLRA-267	51109950100	-77.80313885	38.07375745	Mineral	617 Tall Pines Drive	22204	98.39			

GeoCodingData FIPS Export Report
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Confidential Information - Do Not Distribute
Generated By: Kim Fugel 12/18/2020 8:40 AM
Community Development Financial Institution Fund

Figure 19. Sample Exported File

How to View and Export the Geocoding Report (Alternate Method)

1. Log into AMIS and click on the **'Organizations'** tab.

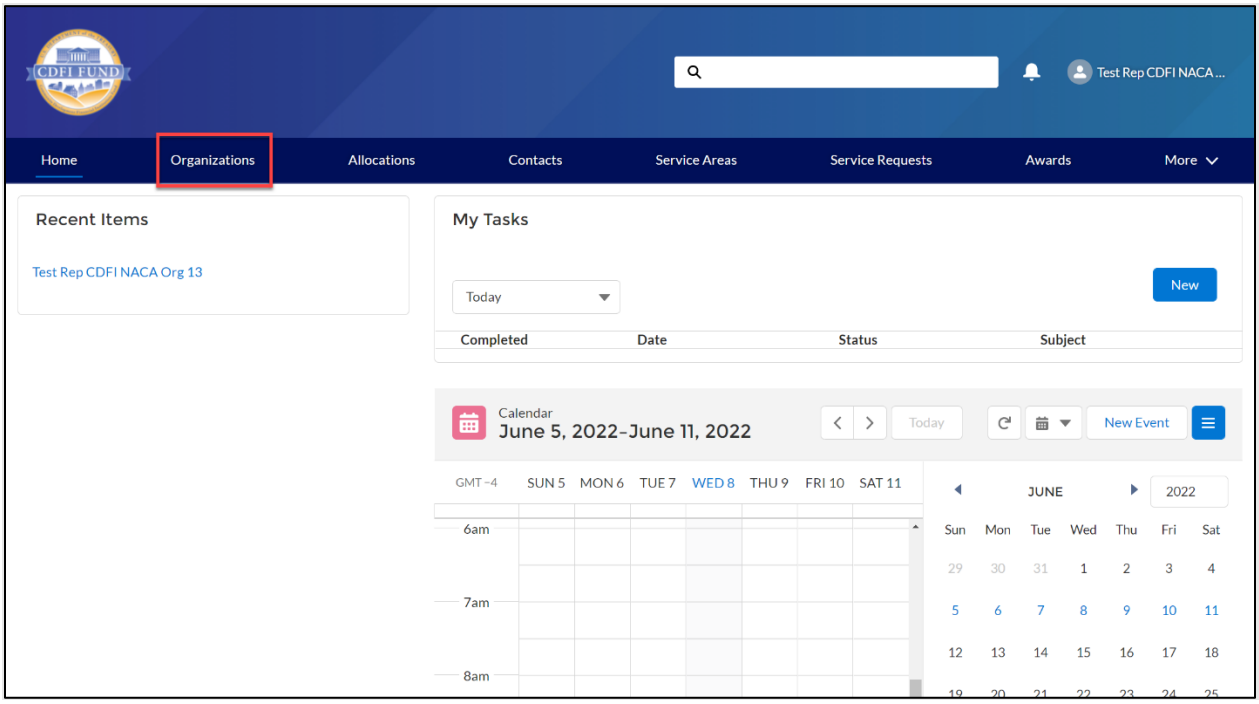

Figure 20. Home Page - Organization Tab

2. Select your **'Organization Name'**.

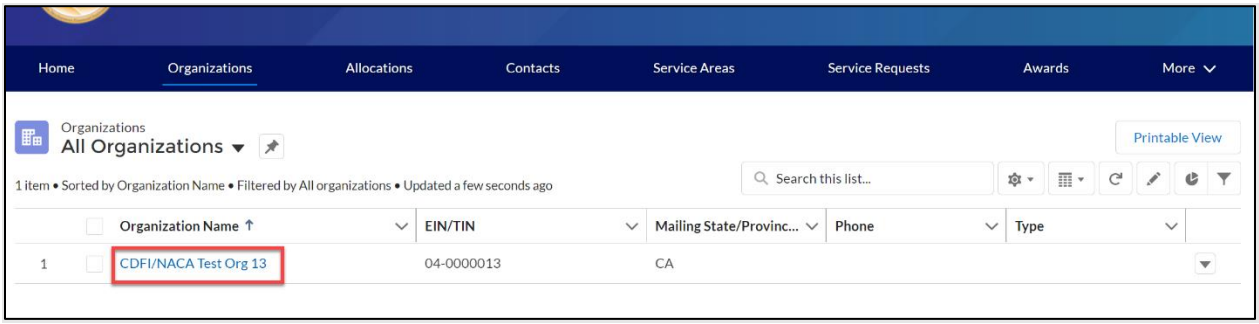

Figure 21. Organization Page - Organization Name

3. On the Details page, scroll down to the System Information section and click the **'GeocodingData FIPS Export Report'** link.

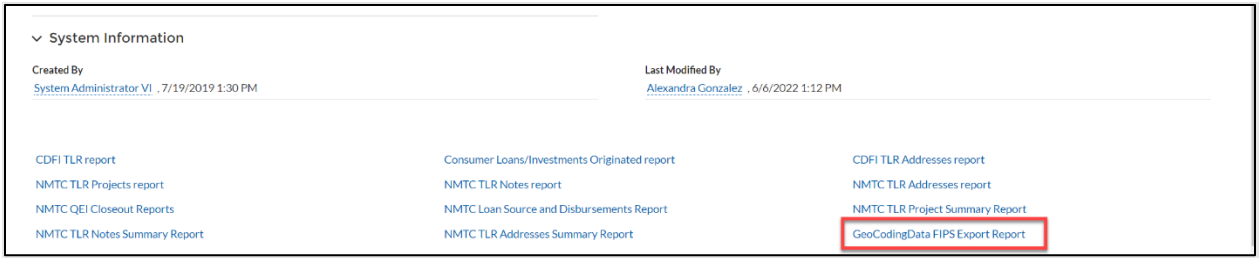

Figure 22. Details Page - GeoCodingData FIPS Export Link

4. To view the record, click on the **'GeoCoding Data Number'** link.

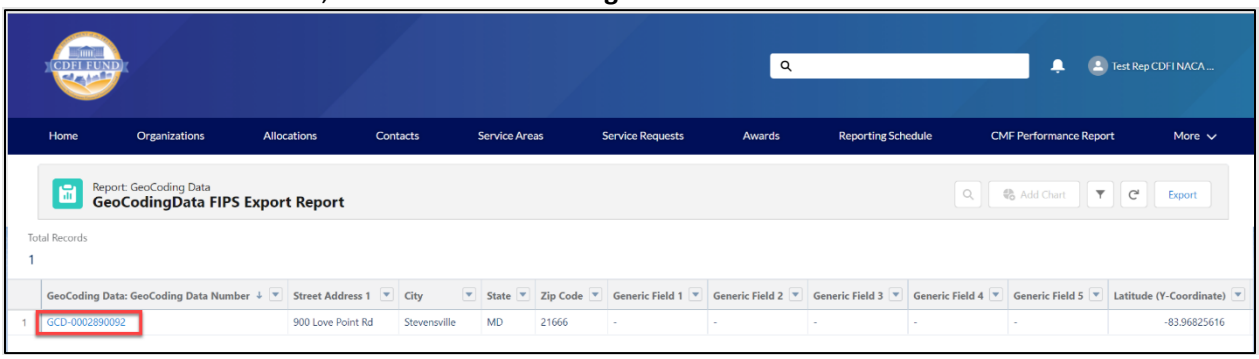

Figure 23. GeoCoding Data Number Link

5. To export the report, click the **'Export'** button.

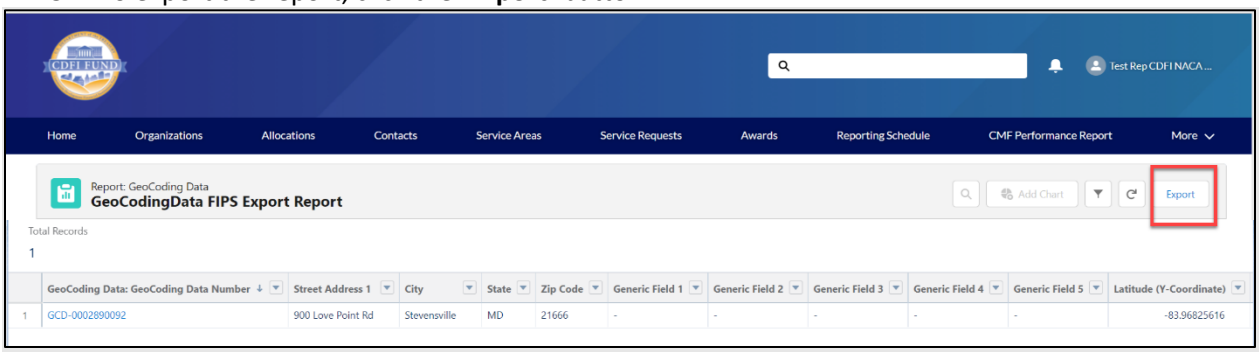

Figure 24. Export Button

Bulk Address Geocoding in AMIS – Training Video

Following is a link to a Training Video on how to use the Bulk Address Geocoding function in AMIS:
https://www.youtube.com/watch?v=68hTC2ZQcYI