



Consumer Compliance Solutions

CRA *Wiz* and Fair Lending *Wiz* 7.0: 2015 Business Demographic Data

Release Notes and Installation Instructions

Release Date: July 2015

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Overview

This update provides the latest business demographic data for use in performance context analysis of small business lending.

Data Source

Dunn and Bradstreet

Who Should Install

Any client licensed for Business Demographic Data should install this update. To determine if you are licensed for Business Demographic Data, go to the **System Maintenance** screen and select **License and Access Management**.

Prerequisites

CRA Wiz and Fair Lending Wiz 7.0 is required to install this update. To check your CRA Wiz and Fair Lending Wiz version, go to the program menu bar and select **Help > About CRA Wiz**. Build numbers starting with "70" are acceptable.

Required permissions

This update is installed as a single table on your SQL server, so both Windows read/write permissions and SQL Server table creation permissions are required. Wolters Kluwer Financial Services recommends that the user running the install have both Windows admin and SQL Server admin login credentials.

Required free space

Approximately 1 GB

Approximate install time

5 to 10 minutes

Installation Instructions

To install 2015 Business Demographic Data, follow these steps:

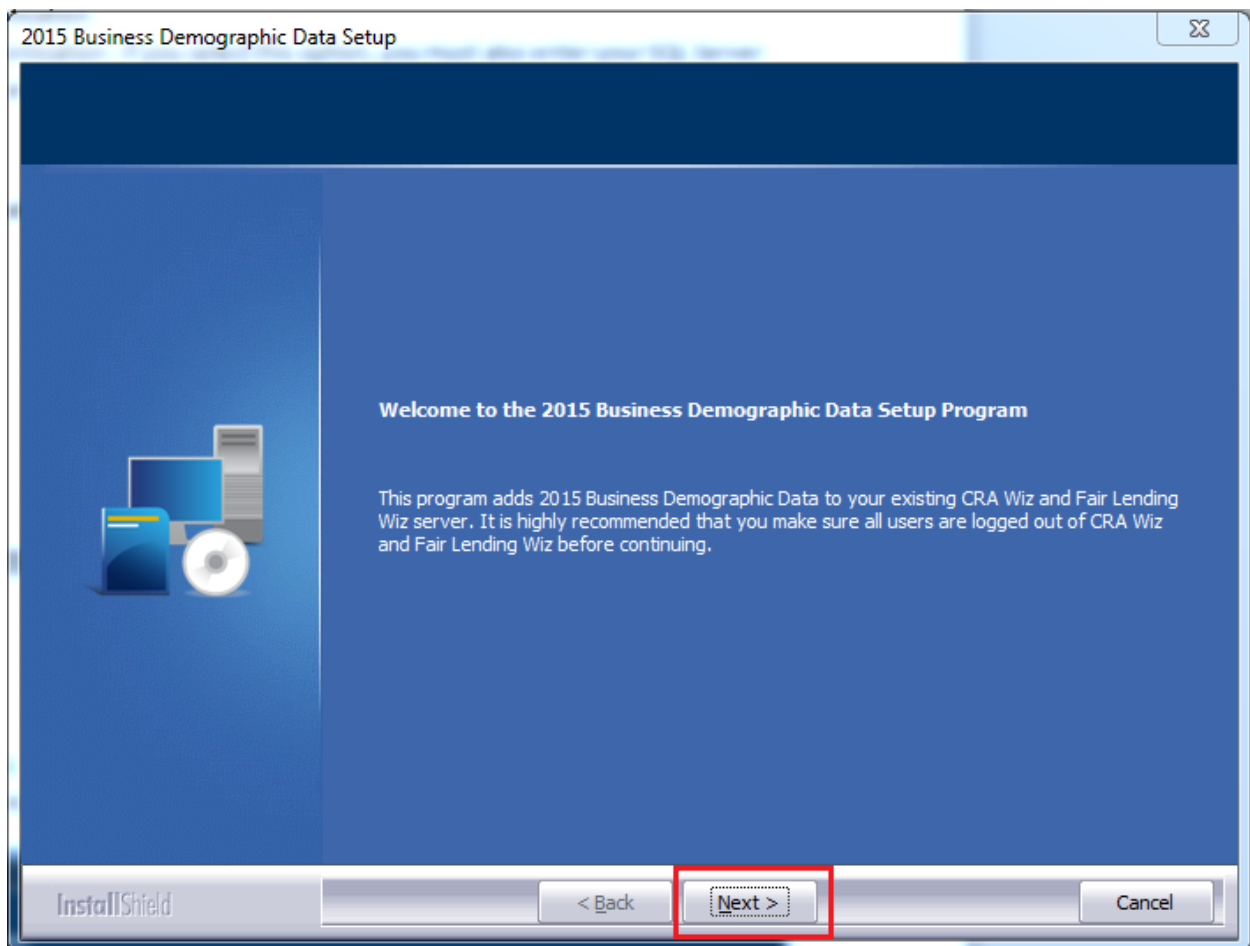
1. After downloading the update, locate and double-click the **2015BusinessDemographicData** installation file.

The installer displays the **Welcome** screen.

2. Follow the directions for each of the following screens.

Welcome Screen

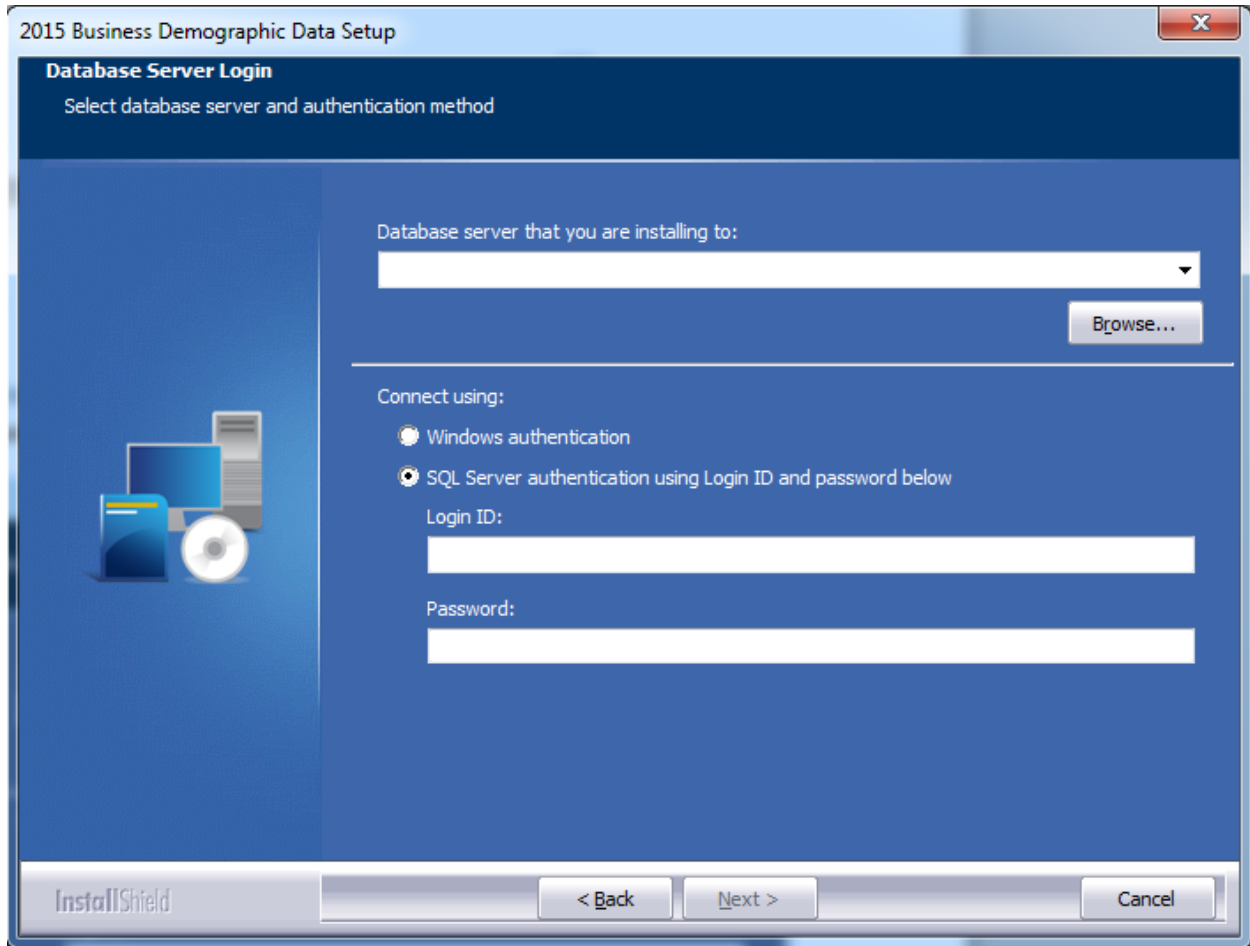
Click the **Next** button:



The software displays the **SQL Server Login** screen.

SQL Server Login Screen

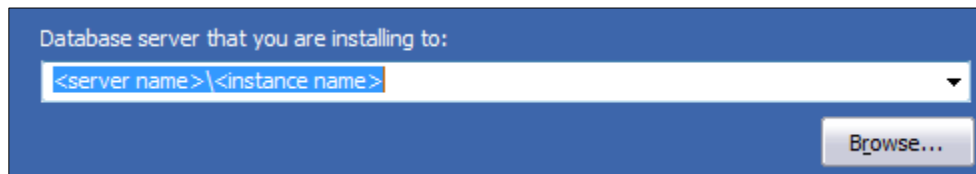
Use this screen to enter the name of the **SQL Server** and to configure authentication options:



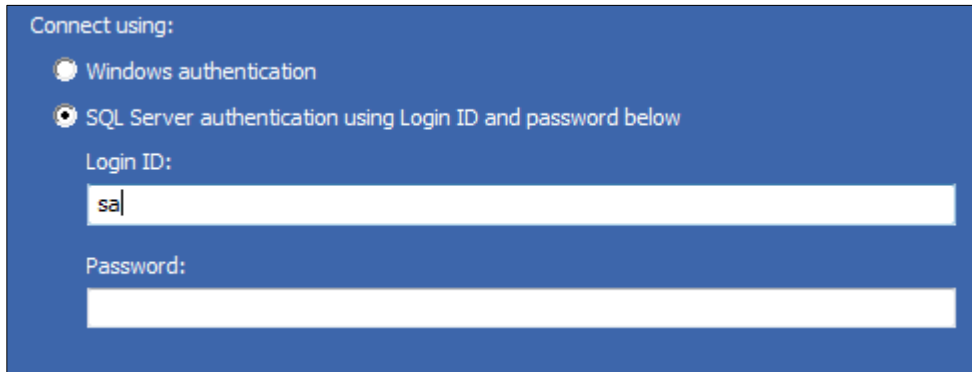
Note: The software displays the Database Server Login screen only if the computer on which you are installing the update is running **SQL Server**. If the installer does not detect SQL Server on your computer, the installer displays the [Ready to Install the Program](#) screen.

1. In the **Database server that you are installing to:** field, enter the **SQL Server name and instance** to which you are installing the data as shown below:

Example: SVRBOS01\SQLEXPRESS



1. Choose one of the following authentication options:
 - Windows Authentication
 - SQL Server Authentication using Login ID and password below - If you select this option, you must also enter your SQL Server account Login ID (user name) and Password in the **Login ID** and **Password** fields.



Connect using:

Windows authentication

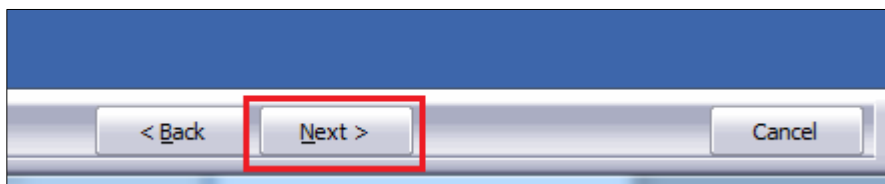
SQL Server authentication using Login ID and password below

Login ID:

sa

Password:

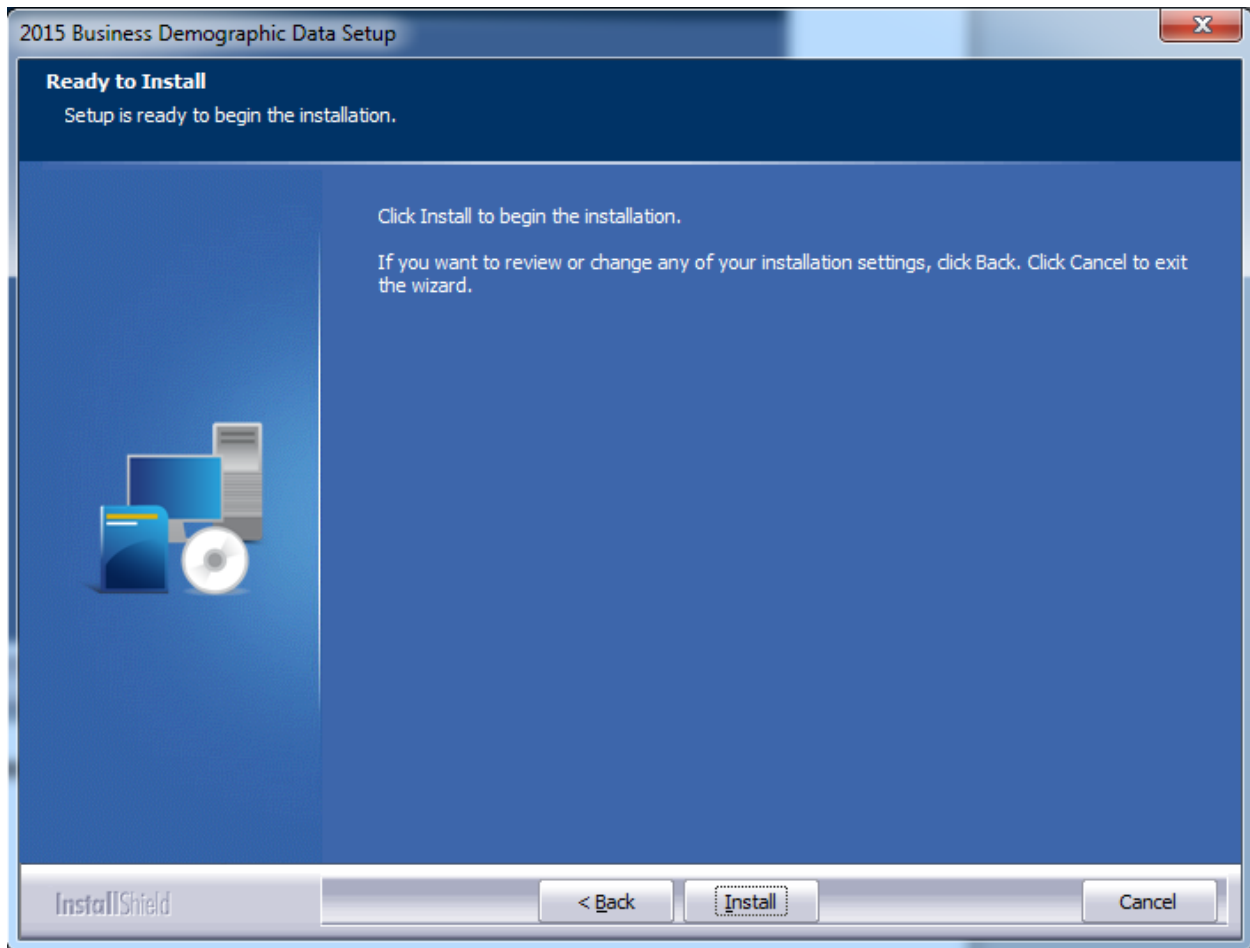
2. Click the **Next** button:



The software displays the **Ready to Install the Program** screen.

Ready to Install Screen

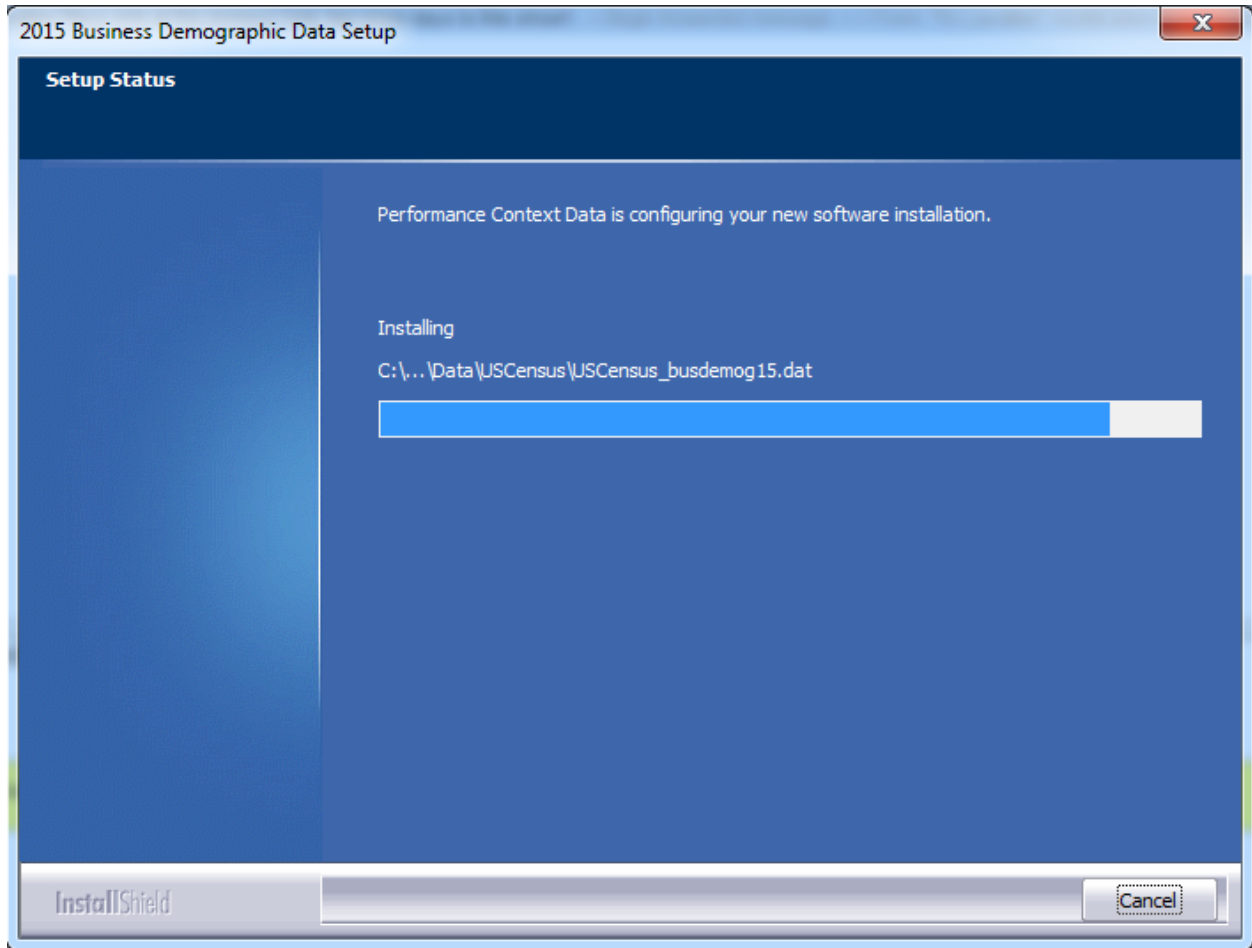
To begin installing the data sets, click the **Install** button:



The installer displays the **Setup Status** screen.

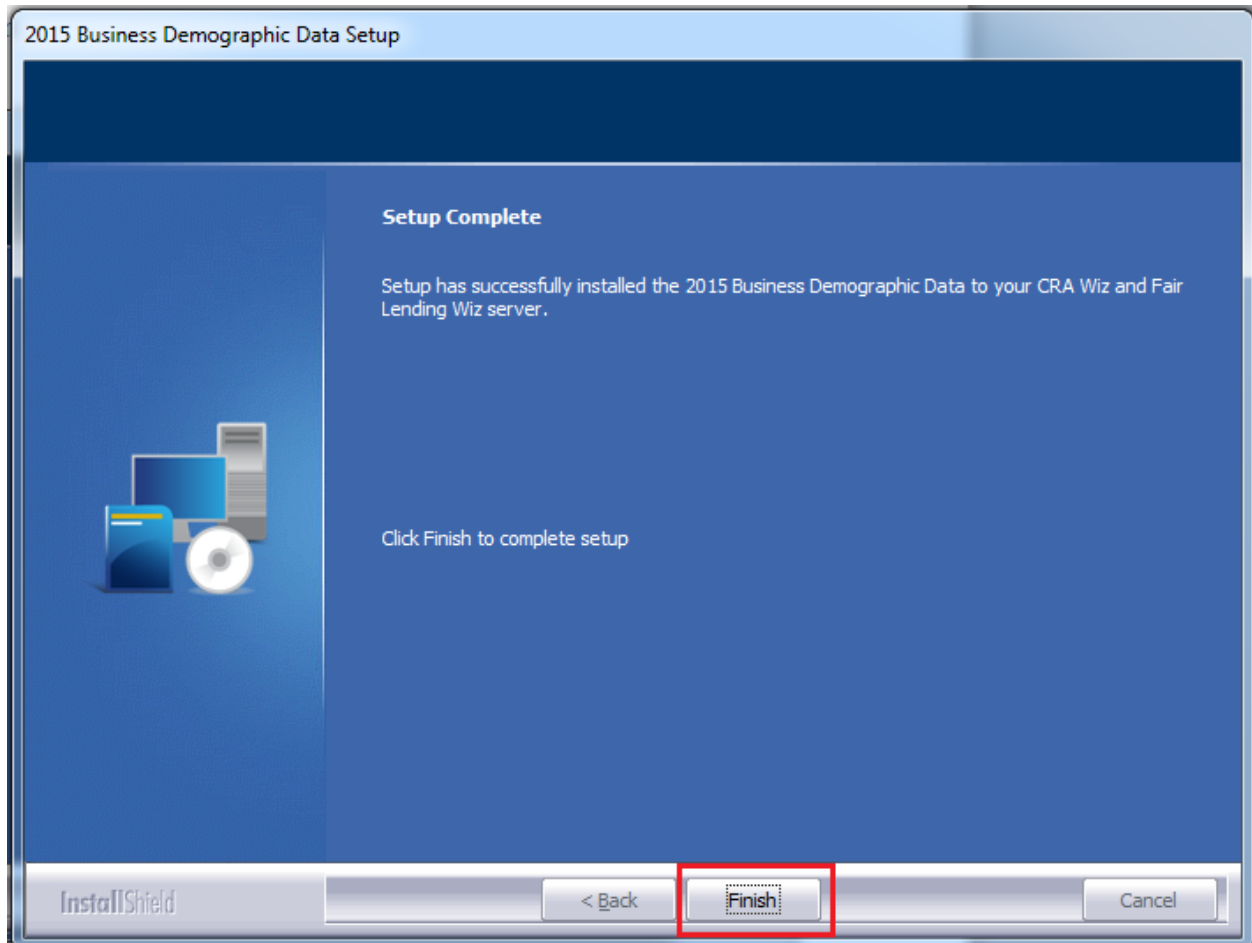
Setup Status Screen

The **Setup Status** screen displays a progress bar that reports the progress of the installation:



Setup Complete Screen

Click the **Finish** button:



Installation is complete.

Confirming Installation

Once the installation is complete, you can verify the installation by selecting the **Creates Areas** option in the CRA *Wiz* and Fair Lending *Wiz* sidebar. You will also need to set Census boundaries to 2010, located in the **Options** menu bar item. In **Create Areas**, right click on a demographic area and choose **Show Demographics**. Choose 2015 from the dropdown and you will see Business Demographics in the lower left corner.

The screenshot shows a software window titled "Demographic Information (Year 2015)". The window has a menu bar with "Publish", "Year", and "Close". A dropdown menu is open under "Year", showing options from 2010 to 2015. Red callout boxes with numbers 1, 2, and 3 point to the "2015" option, the "Year" menu, and the "Business Demographics" sidebar item respectively. The main content area displays a table for "Business Demographics" for the area "Chicago" in "2015". The table has columns for "Total", "Sales <= 1 Mil", "Sales > 1 Mil", "Women/Minority", and "Count". Below this, there are sections for "Employee Size", "Other Data", "Veteran-Owned", and "SICs".

	Total	Sales <= 1 Mil	Sales > 1 Mil	Women/Minority	Count
Women Owned	6,785	6,416	207	Women Owned	29
Minority Owned	421,822	317,303	28,635	Minority Owned	12
Total	428,607	323,719	28,842		

Employee Size	Count	Other Data	Count	Veteran-Owned	Count
1-4	284,024	Headquarters	11,248	All Veteran	2
5-9	39,810	Branches	37,882	Vietnam Veteran	
10-19	24,059	Single Locations	379,477	SICs	Count
20-49	18,872	NA	0	Agriculture	6
50+	13,765	Subsidiaries	4,488	Mining	
NA	48,077	Proprietorship	61,390	Construction	28
Sales Volume	Count	Partnership	15,391	Manufacturing	17
< 0.5 Mil	300,336	Corporation	119,307	Transportation	20
				Wholesale Trade	18

Once you've selected Business Demographics, you should see data to the right as shown above. If zeroes are displayed, the install was not completed successfully.

Note: The CRA *Wiz* and Fair Lending *Wiz* build number (as found in Help > About CRA *Wiz*) is not updated by the 2014 Business Demographic Data installer.

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