Consumer Compliance Solutions

CRA *Wiz* and Fair Lending *Wiz* 7.1: 2016 Business Demographic Data

Release Notes and Installation Instructions

Release Date: August 2016

Wolters Kluwer
Financial Services

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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* 7.1 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 "71" 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

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Installation Instructions

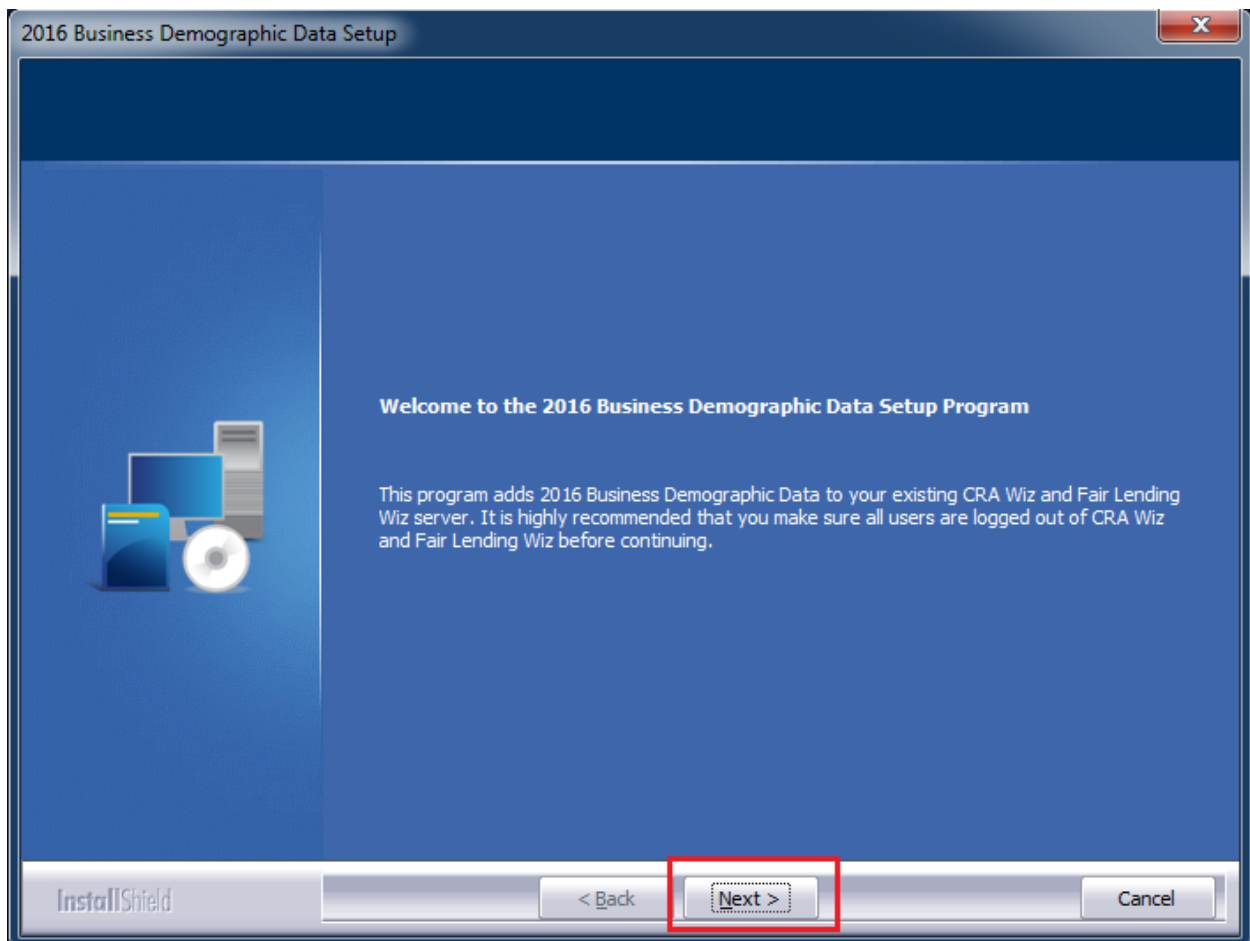To install 2016 Business Demographic Data, follow these steps:

1. After downloading the update, locate and double-click the **2016BusinessDemographicData** installation file.

The installer displays the **Welcome** screen.

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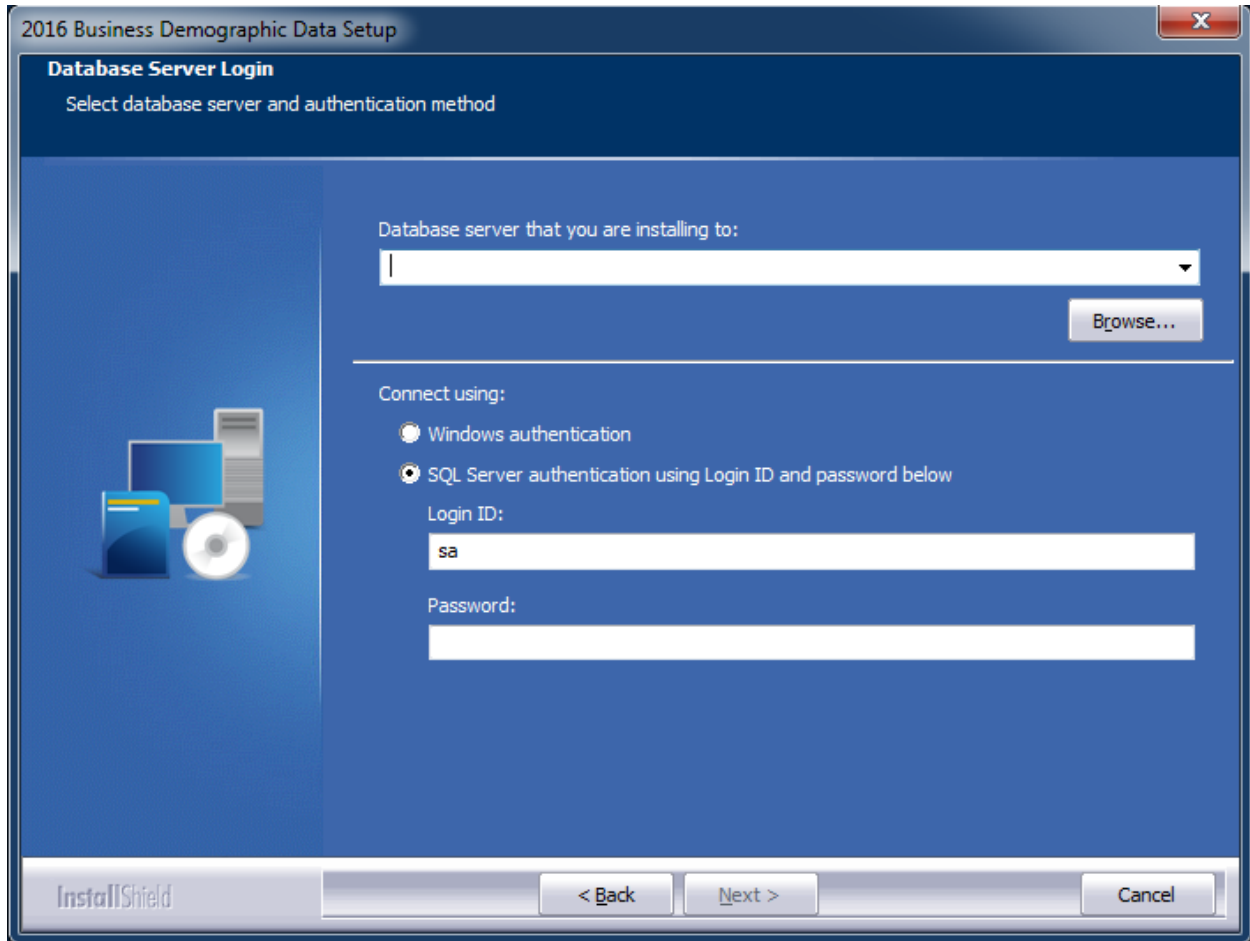
Welcome Screen

Click the **Next** button:

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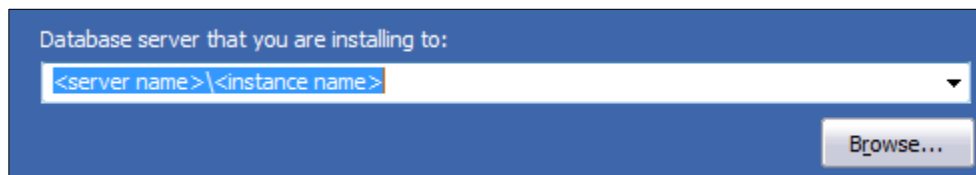
SQL Server Login Screen

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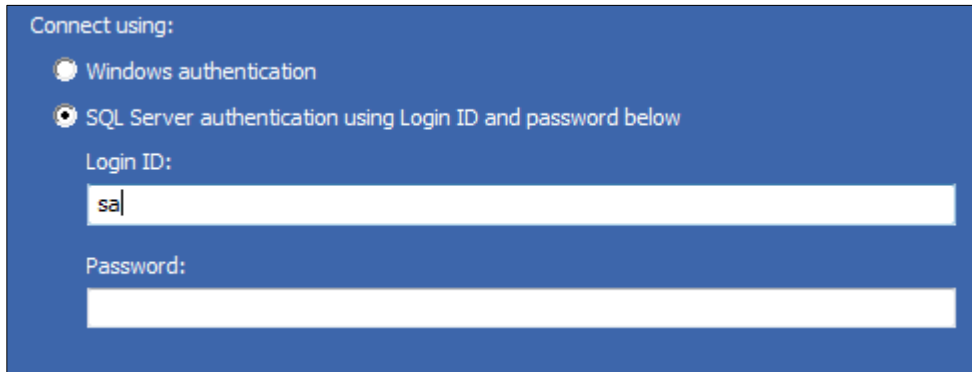

Note: The software displays the Database Server Login screen only if the computer on which you are installing the update is running **SQL Server**. If the installer does not detect SQL Server on your computer, the installer displays the Ready to Install the Program screen.

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.
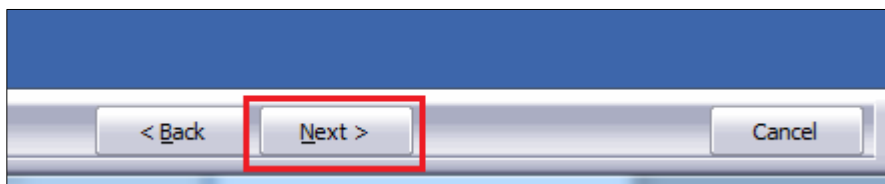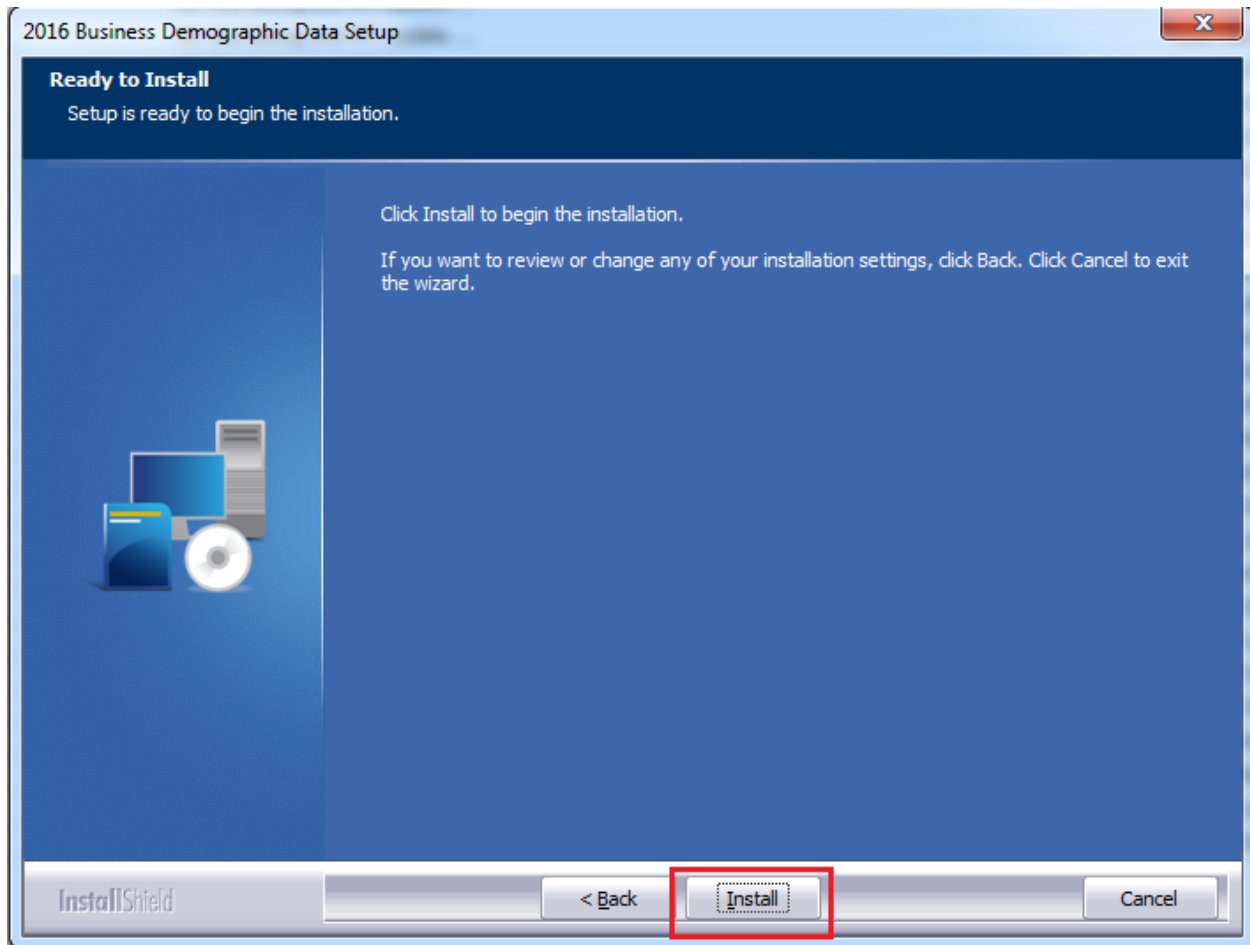

2. Click the **Next** button:

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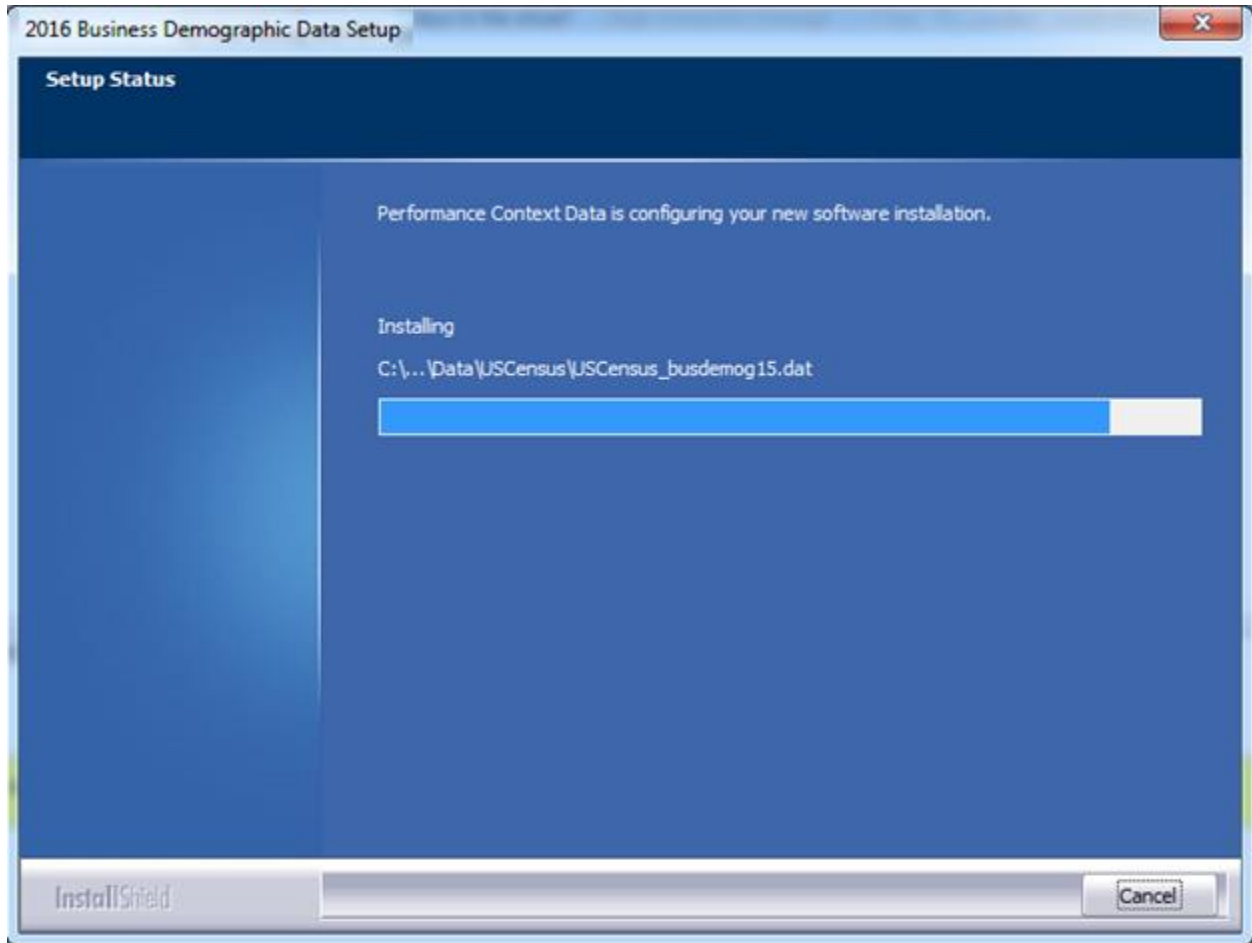
Ready to Install Screen

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

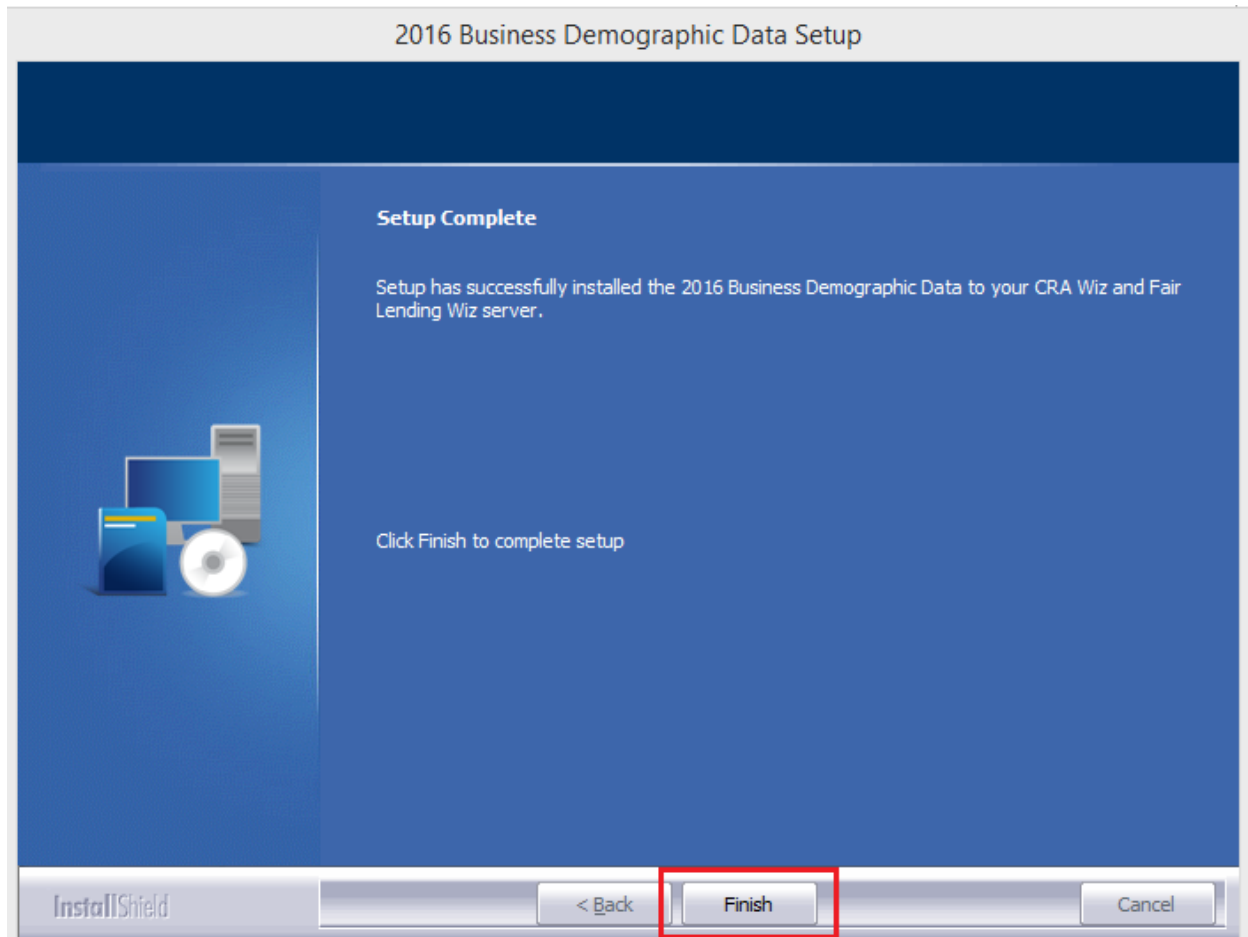The installer displays the **Setup Status** screen.

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

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Confirming Installation

Once the installation is complete, you can verify the installation by selecting the **Create 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 **2016** from the dropdown (**1**) and you will see Business Demographics in the lower left corner.

Once you've selected Business Demographics (**2**), 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 2016 Business Demographic Data installer.

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