



Consumer Compliance Solutions

# CRA *Wiz* and Fair Lending *Wiz*: 2018 Business Demographic Data

Release Notes and Installation Instructions

Release Date: July 2018

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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

Dun 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 7.3 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 "73" 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 2018 Business Demographic Data, follow these steps:

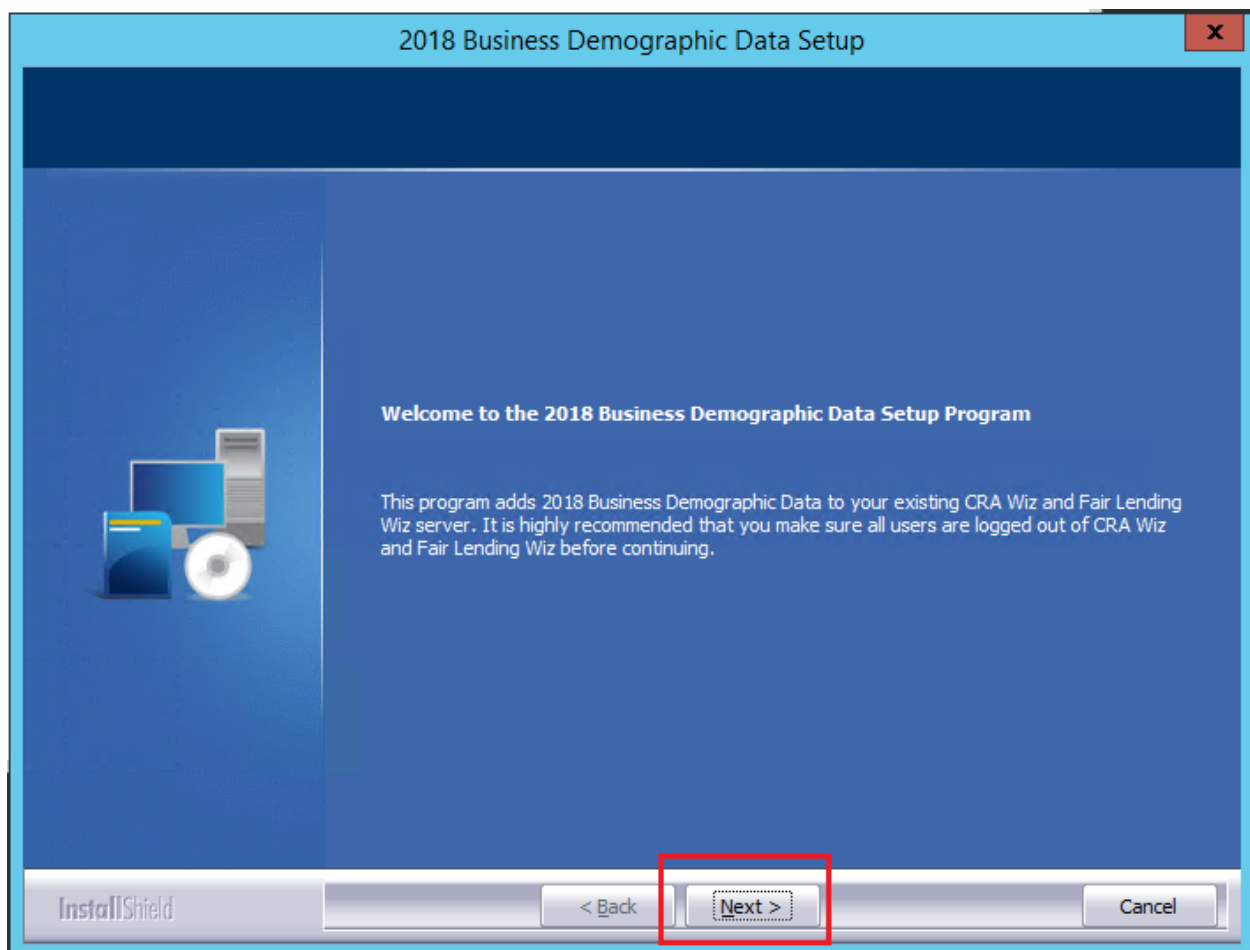
1. After downloading the update locally to your SQL Server, locate and double-click the **2018BusinessDemographicData** installation file.

The installer displays the **Welcome** screen.

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

### Welcome Screen

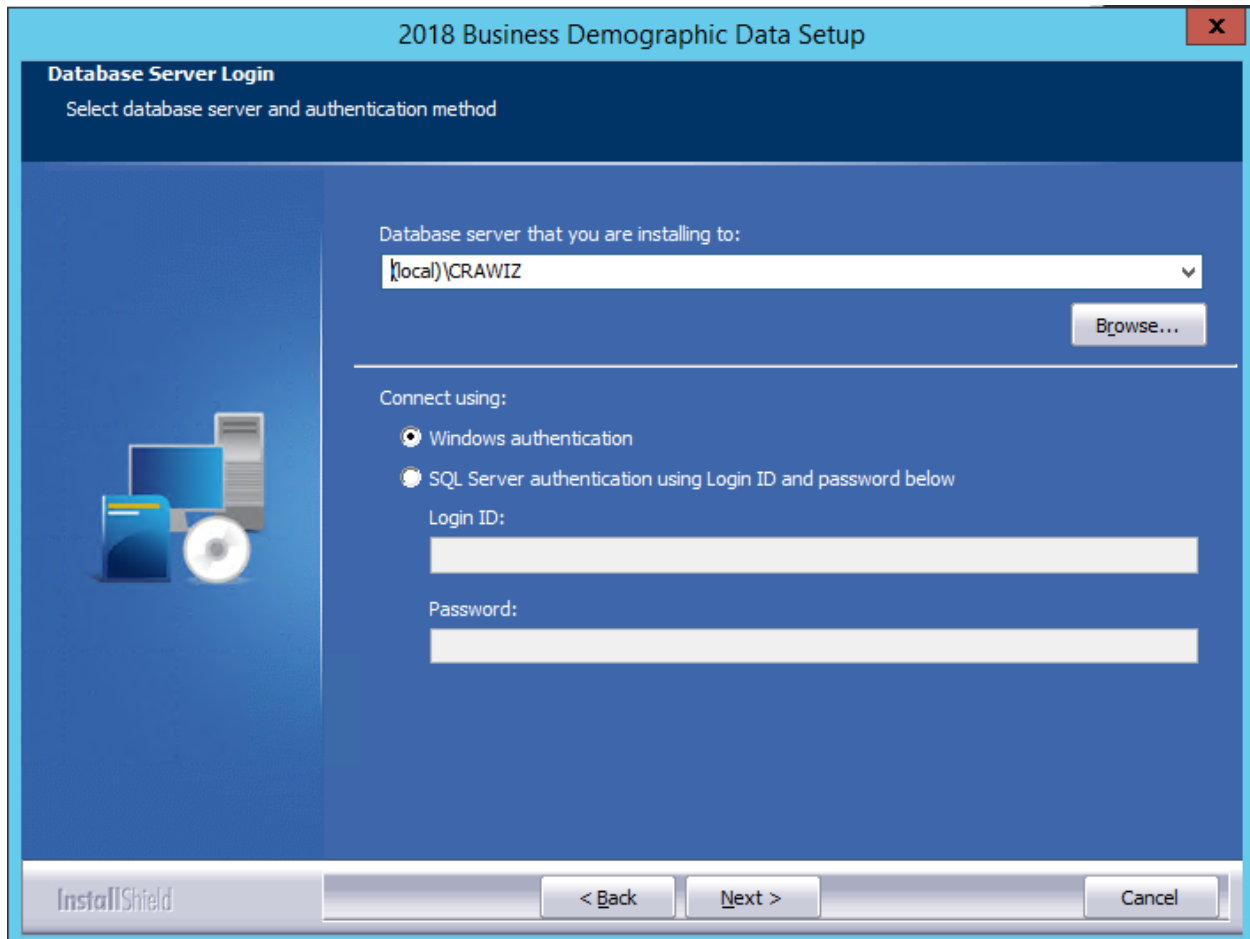
Click the **Next** button:



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

## SQL Server Login Screen

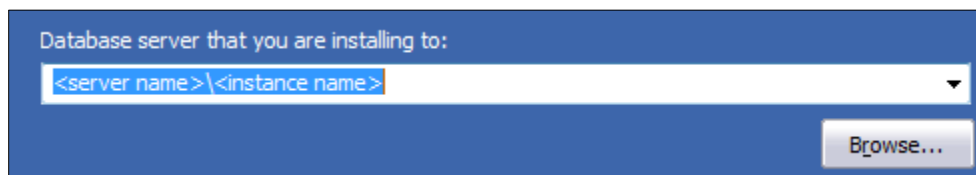
Use this screen to enter the name of the **SQL Server** and to configure authentication options:



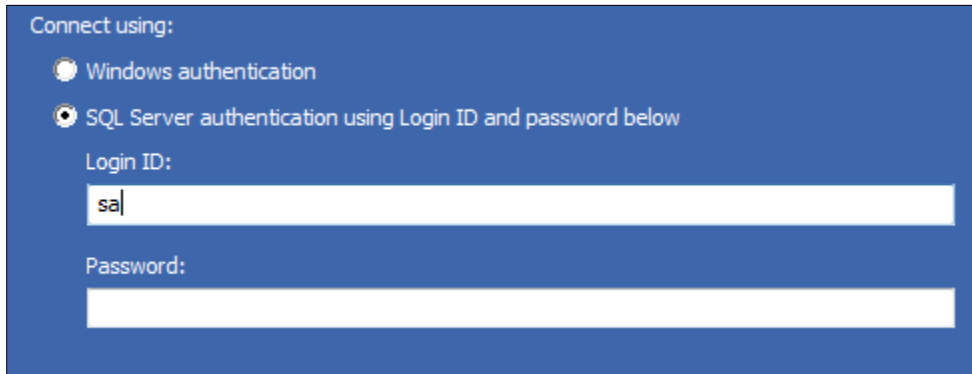
**Note:** The software displays the Database Server Login screen only if the computer on which you are installing the update is running **SQL Server**. If the installer does not detect SQL Server on your computer, the installer displays the [Ready to Install the Program](#) screen.

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

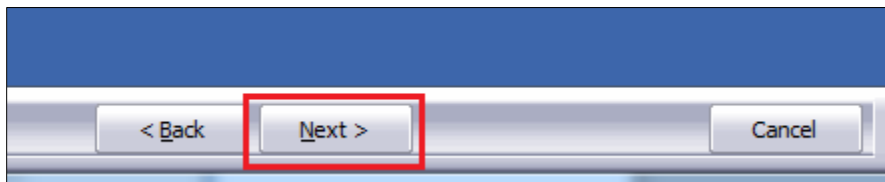
SQL Server authentication using Login ID and password below

Login ID:

sa

Password:

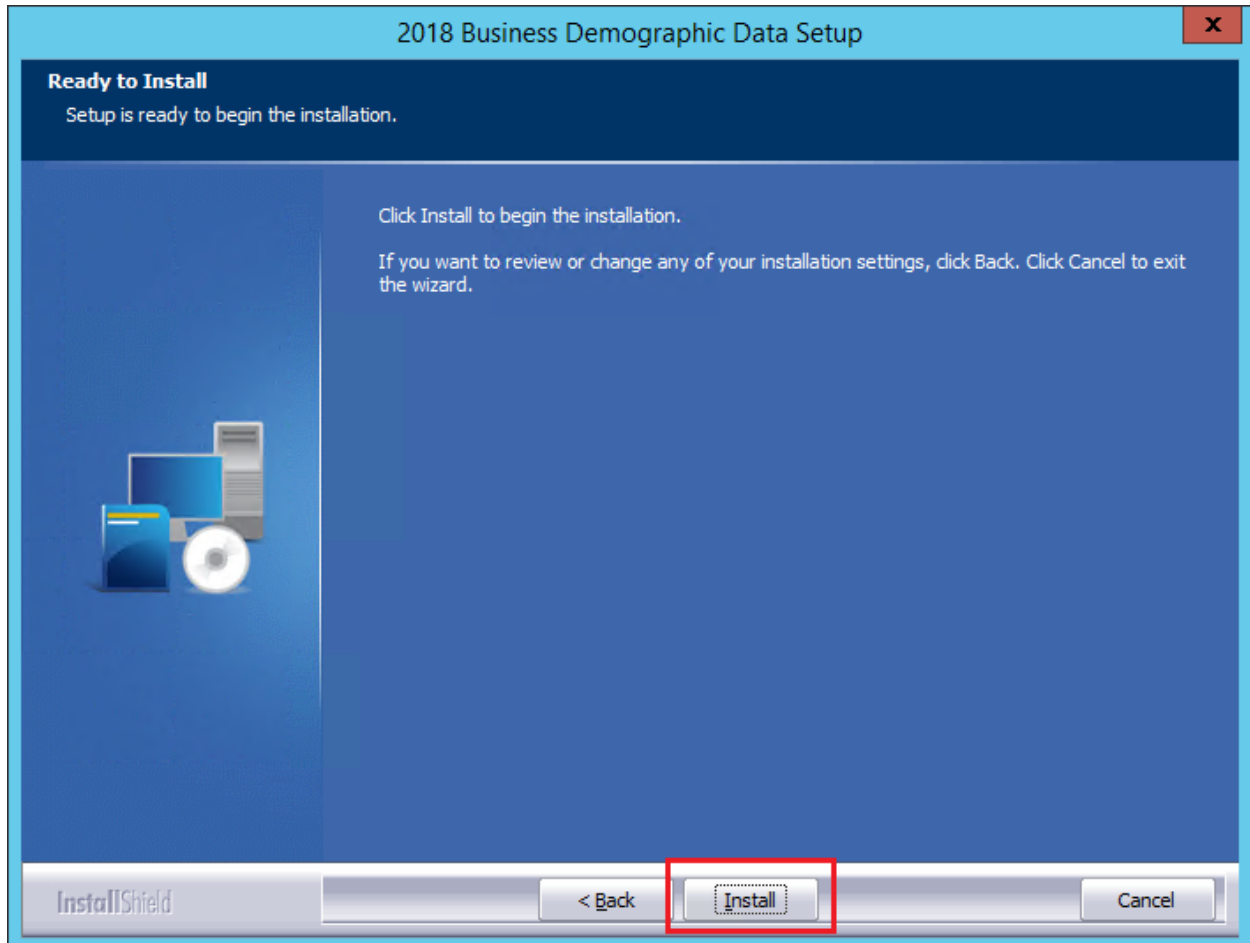
2. Click the **Next** button:



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

## Ready to Install Screen

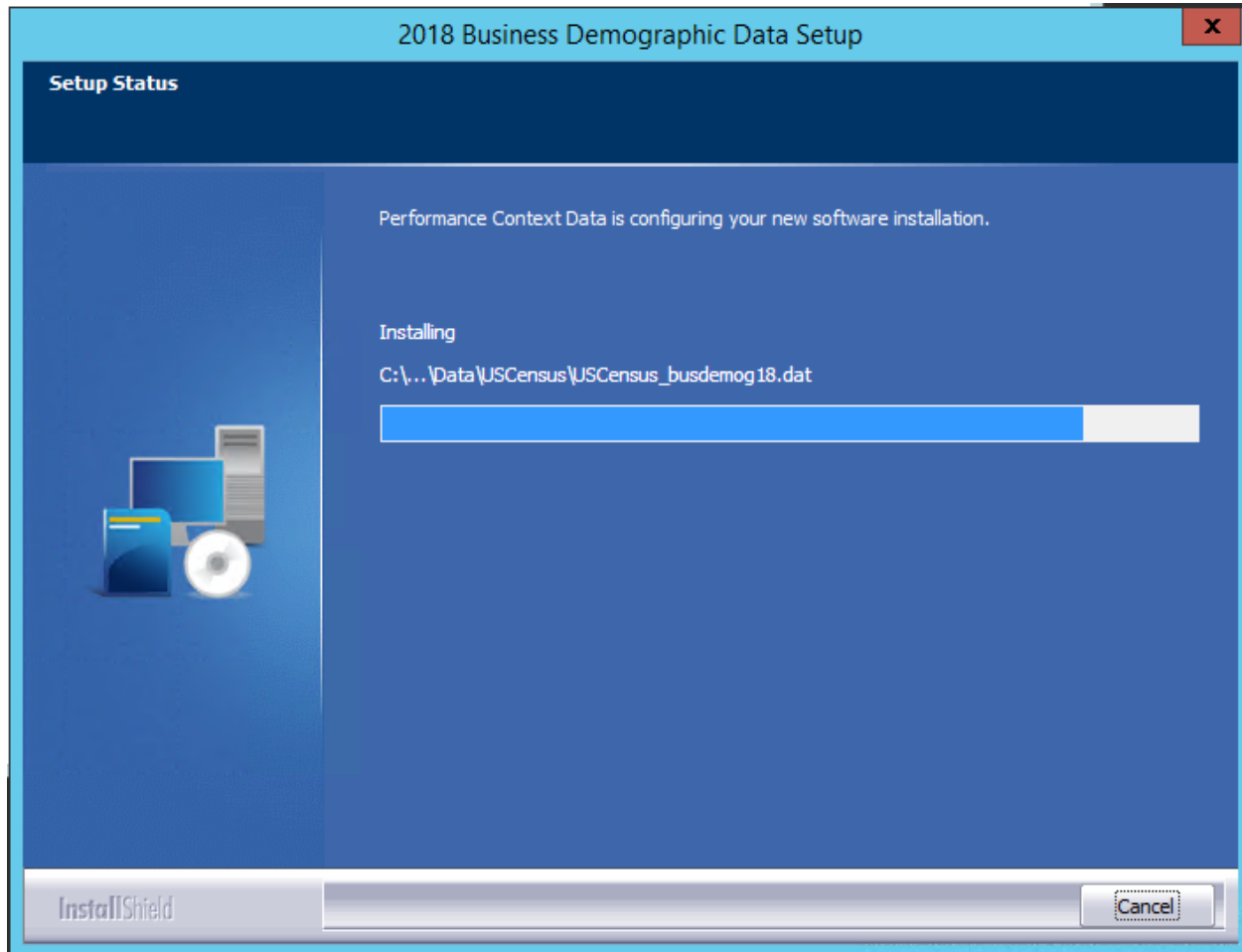
To begin installing the data sets, click the **Install** button:



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

## Setup Status Screen

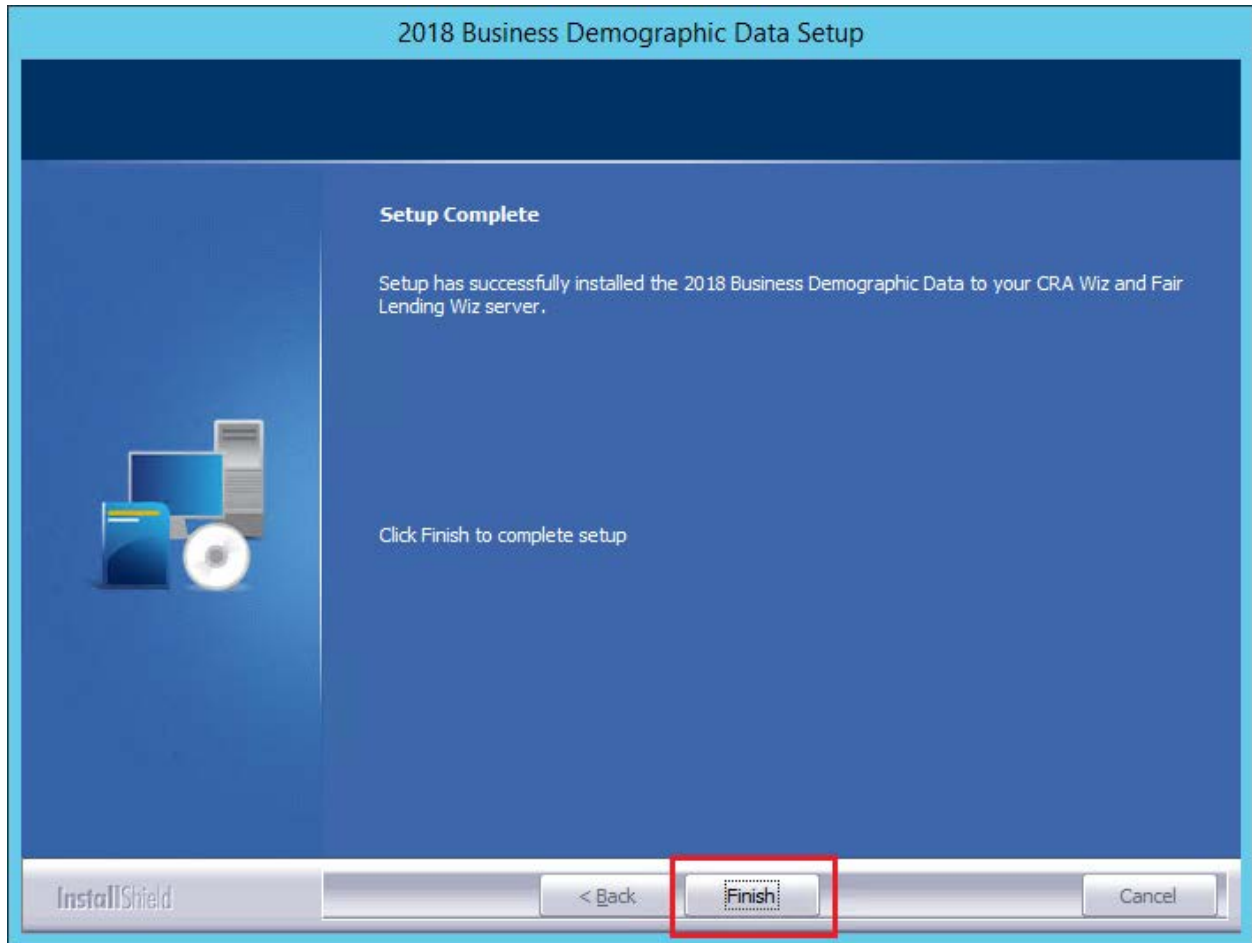
The **Setup Status** screen displays a progress bar that reports the progress of the installation:





## 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 **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 **2018** from the dropdown (1) and you will see Business Demographics in the lower left corner.

The screenshot shows a software window titled "Demographic Information (Year 2018)". A dropdown menu is open, showing years from 2010 to 2018, with "2018" highlighted in a red box. The main content area displays "Business Demog" data for "MSA: All County: All Tract: All Year: 2018".

	Total	Sales<=1 Mil	Sales>1 Mil	Women/Minority	Count
	9,465	9,040	220	Women Owned	17,451
	258,400	205,956	16,225	Minority Owned	7,652
	267,865	214,996	16,445		

Age	Count	Other Data	Count	Veteran-Owned	Count
18-24	163,509	Headquarters	5,686	All Veteran	3,718
5-9	64,530	Branches	32,090	Vietnam Veteran	536
10-19	17,529	Single Locations	230,089	<b>SICs</b>	<b>Count</b>
20-49	12,827	NA	0	Agriculture	9,465
50+	8,130	Subsidiaries	1,930	Mining	325
NA	1,340	Proprietorship	43,203	Construction	18,666
		Partnership	11,991	Manufacturing	9,265
<b>Sales Volume</b>	<b>Count</b>	Corporation	68,962	Transportation	12,131
<0.5 Mil	202,519	NA	143,709	Wholesale Trade	9,886
0.5-0.9 Mil	11,938	Property Owned	235,056	Retail Trade	39,328
1-24 Mil	15,579	Property Rented	14,701	Finance, Insurance	20,949
25-49 Mil	634	NA	18,108	Services	105,408
50+	771			Public Admin.	6,884
NA	36,424			Nonclassifiable	35,558

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 2018 Business Demographic Data installer.

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