



Consumer Compliance Solutions

# CRA *Wiz* and Fair Lending *Wiz*: 2019 Business Demographic Data

Release Notes and Installation Instructions

Release Date: October 2019

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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 7.3SP2 (Build 73.24.29) with the 2019 Census Update 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 "73.24" 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

Five (5) minutes

## Installation Instructions

To install 2019 Business Demographic Data, follow these steps:

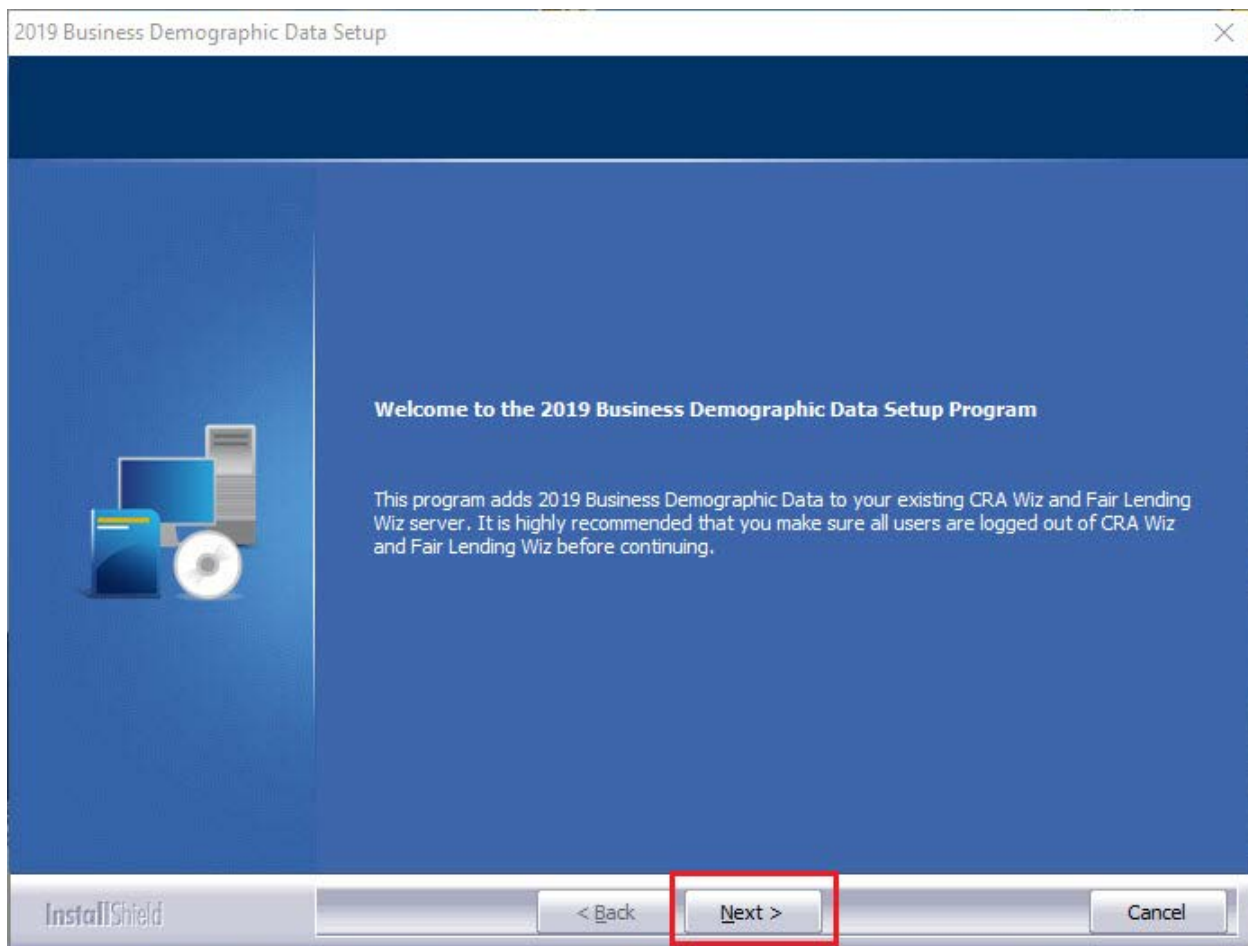
1. After downloading the update locally to your SQL Server, locate and double-click the **2019BusinessDemographicData** installation file.

The installer displays the **Welcome** screen.

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

### Welcome Screen

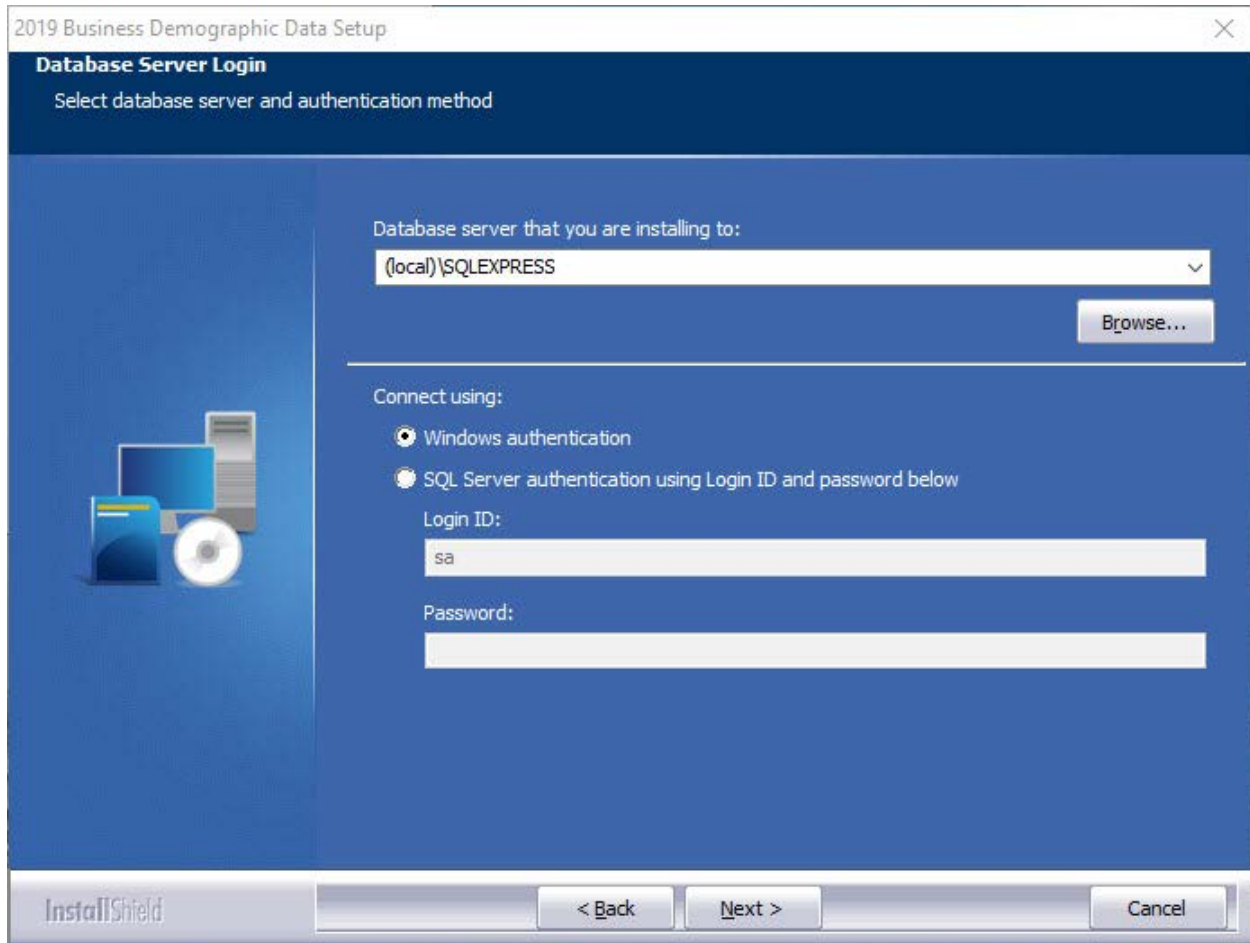
Click the **Next** button:



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

## SQL Server Login Screen

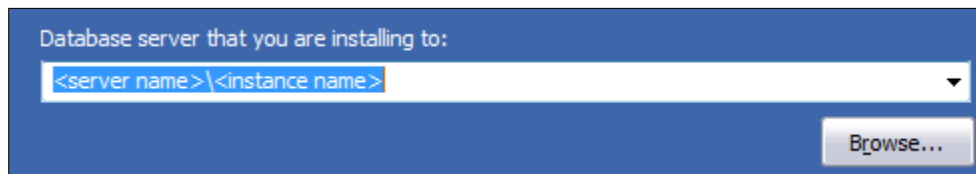
Use this screen to enter the name of the **SQL Server** and to configure authentication options:



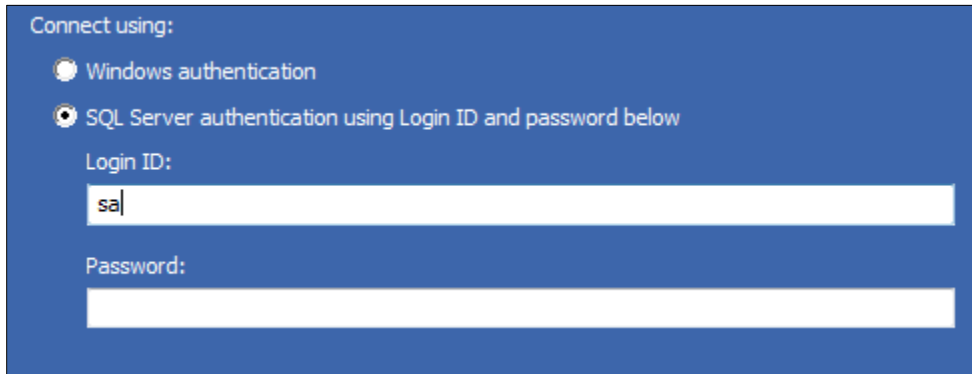
**Note:** The software displays the Database Server Login screen only if the computer on which you are installing the update is running **SQL Server**. If the installer does not detect SQL Server on your computer, the installer displays the [Ready to Install the Program](#) screen.

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

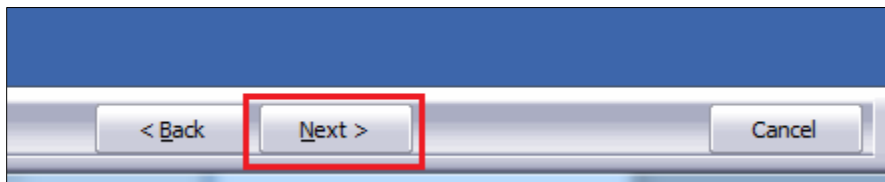
SQL Server authentication using Login ID and password below

Login ID:

sa

Password:

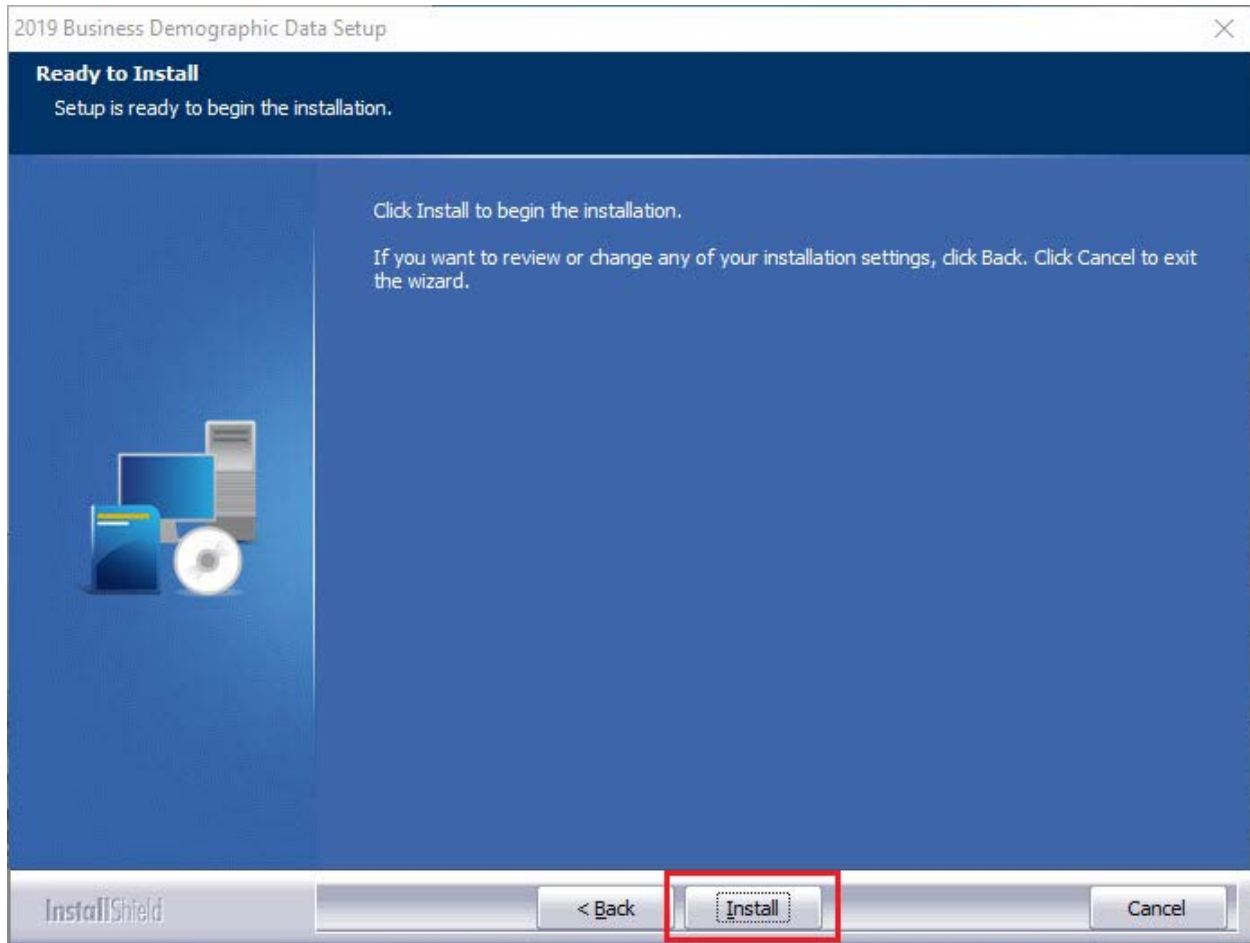
2. Click the **Next** button:



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

## Ready to Install Screen

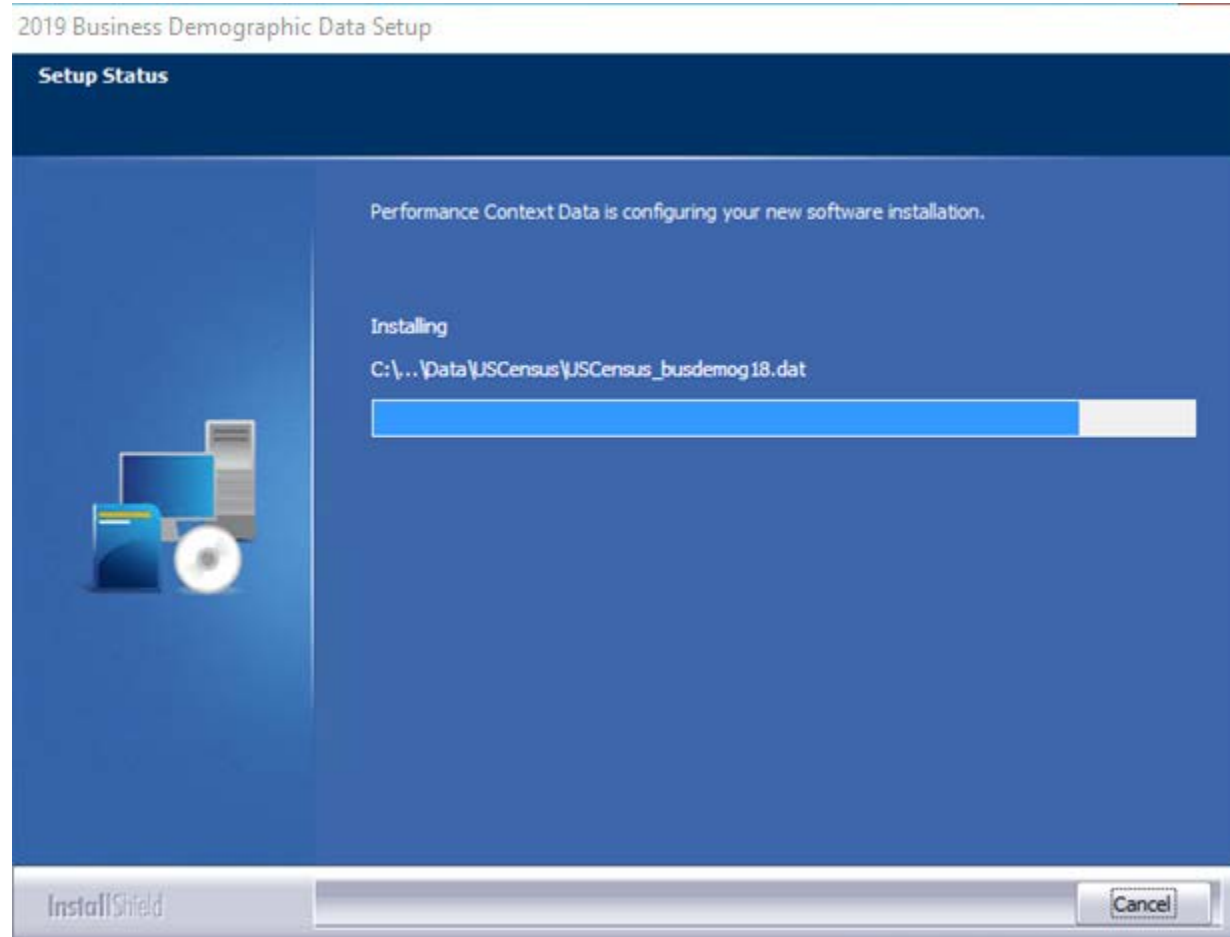
To begin installing the data sets, click the **Install** button:



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

## Setup Status Screen

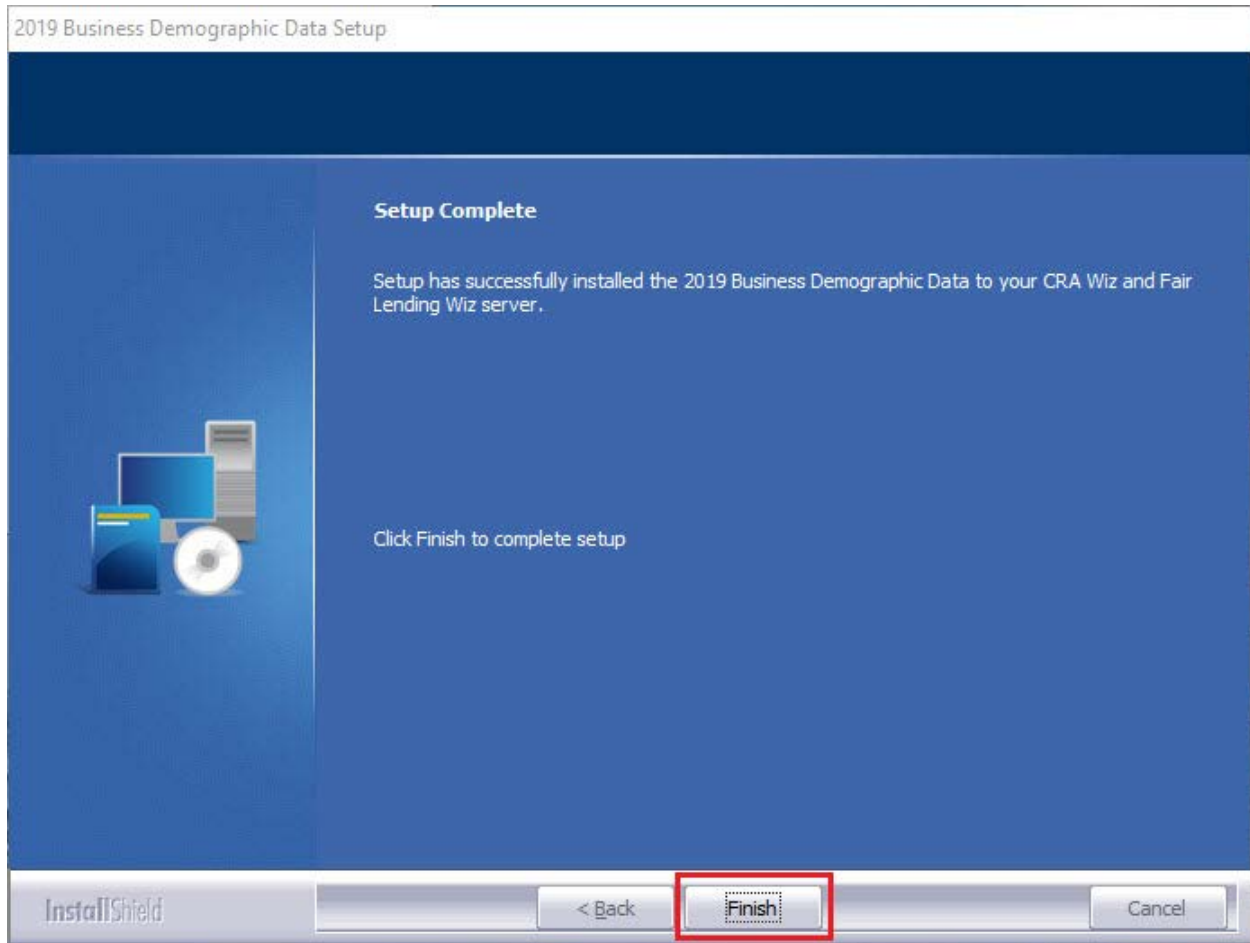
The **Setup Status** screen displays a progress bar that reports the progress of the installation:





## 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 **2019** from the dropdown (1) and you will see Business Demographics in the lower left corner:

The screenshot shows the 'Demographic Information (Year 2019)' window. The 'Year' dropdown menu is highlighted with a red box and a red arrow pointing to it, with the number '1' next to it. The 'Business Demog' section is selected in the sidebar. The main content area displays the following data:

State: 01 MSA: 11500 County: All Tract: All Year: 2019

Business	Total	Sales<=1 Mil	Sales>1 Mil	Women/Minority	Count
Farm	172	168	2	Women Owned	358
Non Farm	5,968	4,673	343	Minority Owned	102
<b>Total</b>	<b>6,140</b>	<b>4,841</b>	<b>345</b>		

Employee Size	Count	Other Data	Count	Veteran-Owned	Count
1-4	3,482	Headquarters	104	All Veteran	81
5-9	1,734	Branches	913	Vietnam Veteran	13
10-19	417	Single Locations	5,123	<b>SICs</b>	<b>Count</b>
20-49	291	NA	0	Agriculture	172
50+	205	Subsidiaries	28	Mining	6
NA	11	Proprietorship	1,122	Construction	386
		Partnership	197	Manufacturing	224
		Corporation	1,358	Transportation	302
		NA	3,463	Wholesale Trade	184
		Property Owned	5,514	Retail Trade	1,049
		Property Rented	349	Finance, Insurance	376
		NA	277	Services	2,317
				Public Admin.	147
				Nonclassifiable	977

The '50+' row in the 'Employee Size' table is highlighted with a red box and the number '2' next to it.

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 2019 Business Demographic Data installer.

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