Wolters Kluwer

Installation Instructions and Release Notes

May 2020

Governance, Risk & Compliance

CRA *Wiz* and Fair Lending *Wiz*: 2020 Business Demographic Data

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1 Overview

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

1.1 Data Source

Dun and Bradstreet

1.2 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**.

1.3 Prerequisites

CRA *Wiz* and Fair Lending *Wiz* 7.4 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 "74" are acceptable.

1.4 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.

1.5 Required free space

Approximately 50MB (megabytes).

1.6 Approximate install time

Less than 15 minutes.

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2 Installation Instructions

To install 2020 Business Demographic Data, follow these steps:

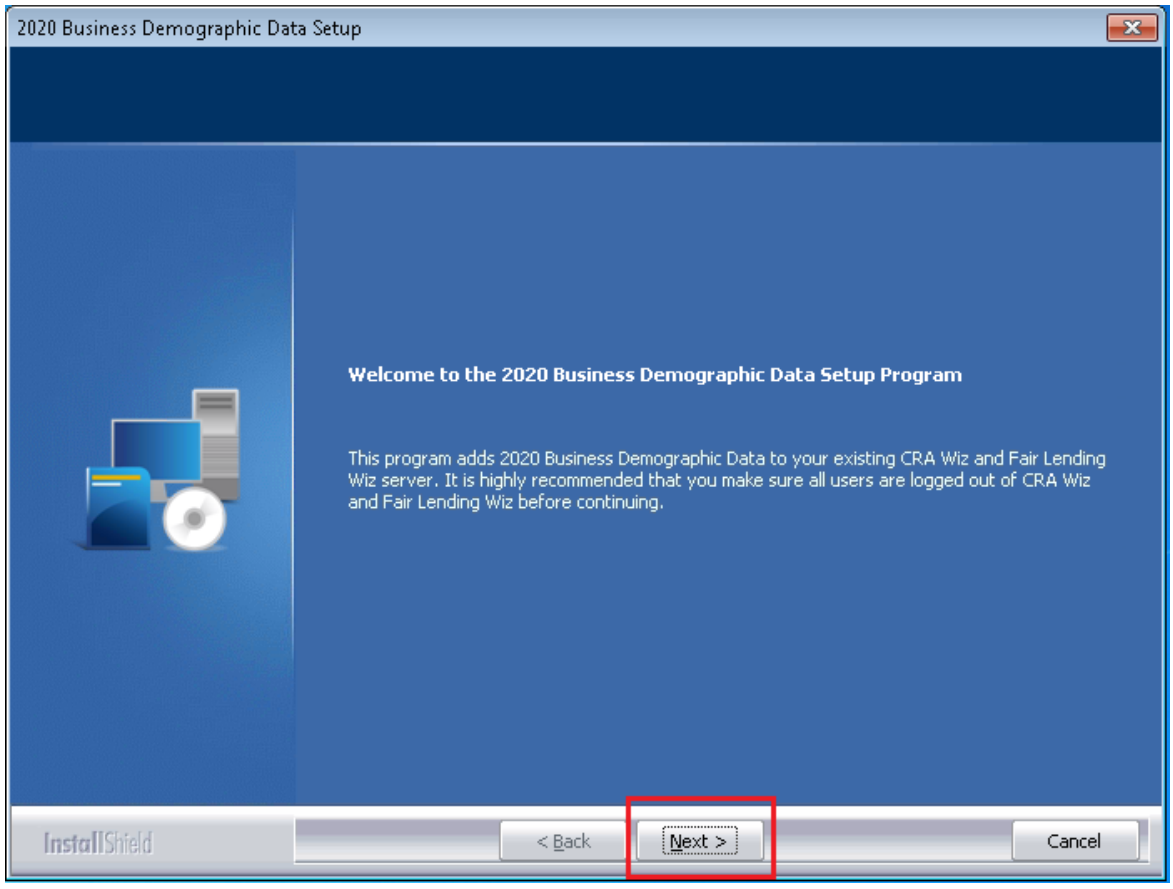
1. After downloading the update locally to your SQL Server, locate and double-click the **2020BusinessDemographicData** installation file.

   The installer displays the **Welcome** screen.

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

2.1 Welcome Screen

Click the **Next** button:



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

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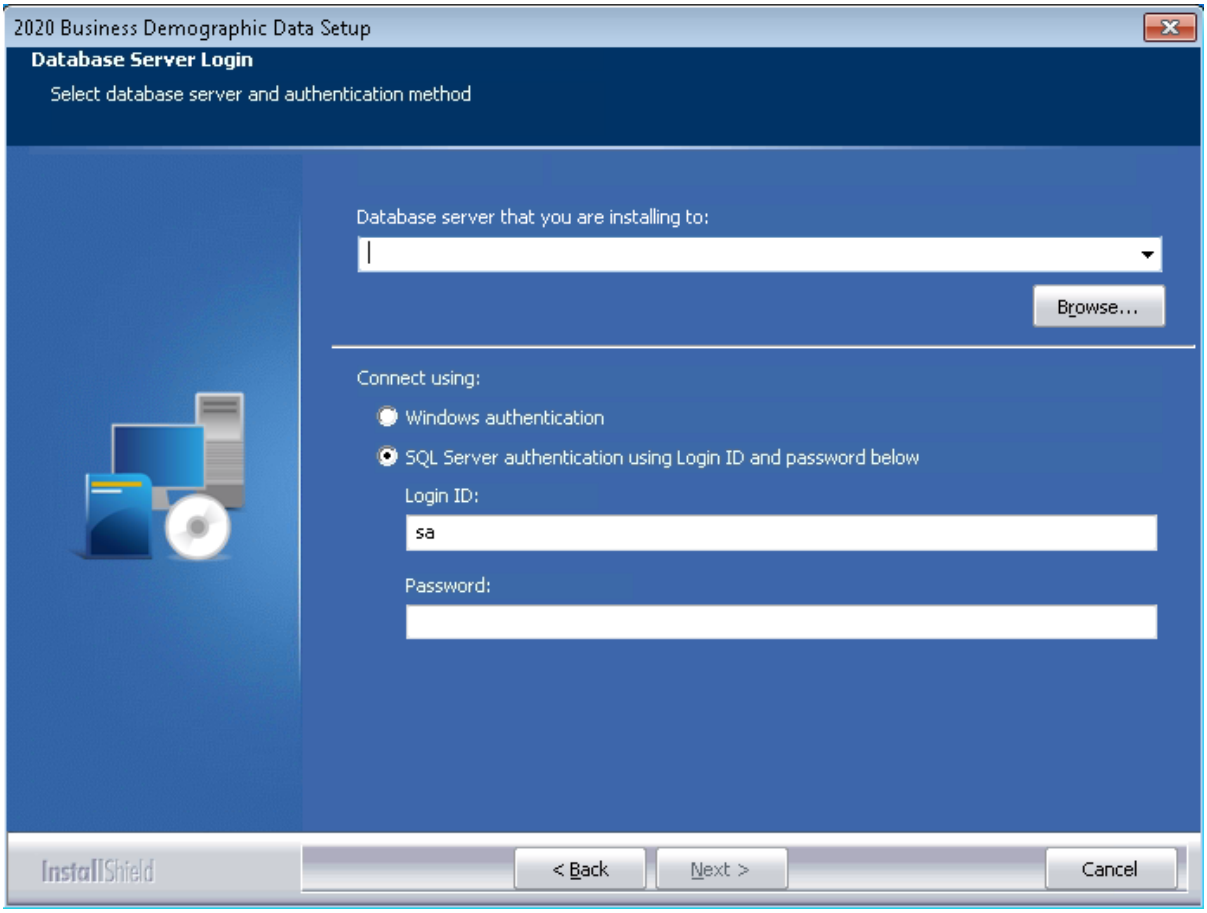
2.2 SQL Server Login Screen

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 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

2. Choose one of the following authentication options:

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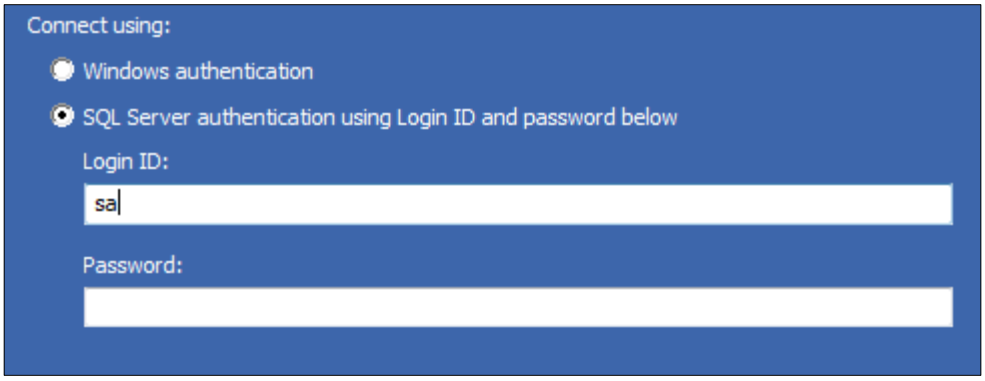
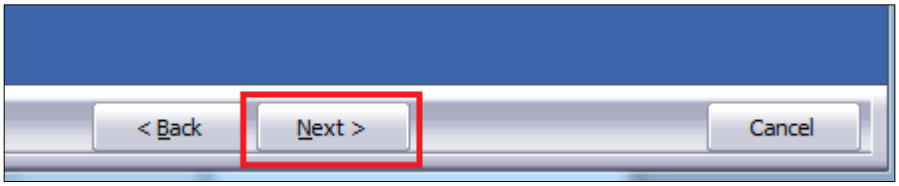
- Windows Authentication
- SQL Server Authentication using Login ID and password below - If you select this option, you must also enter your SQL Server account Login ID (user name) and Password in the **Login ID** and **Password** fields.



3. Click the **Next** button:



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

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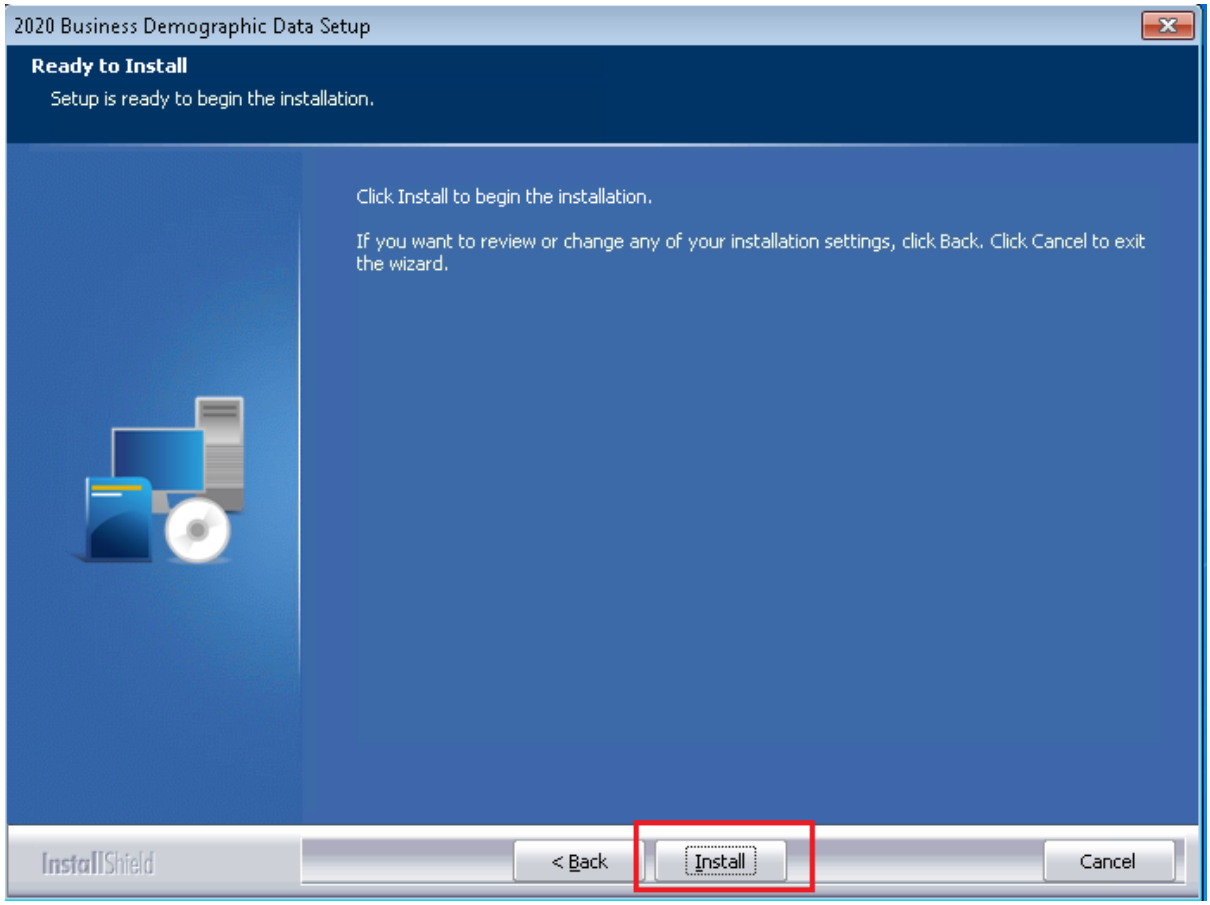
2.3 Ready to Install Screen

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



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

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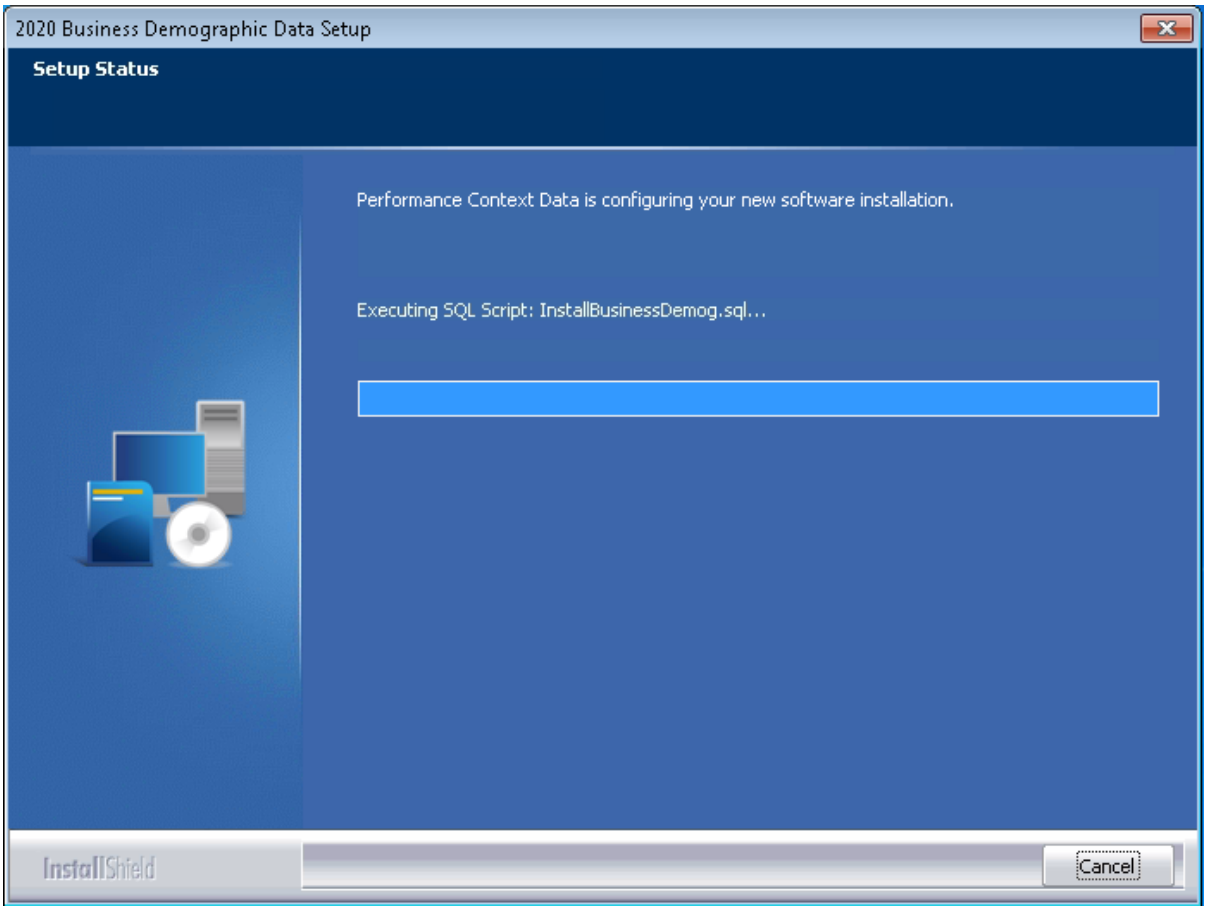
2.4 Setup Status Screen

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



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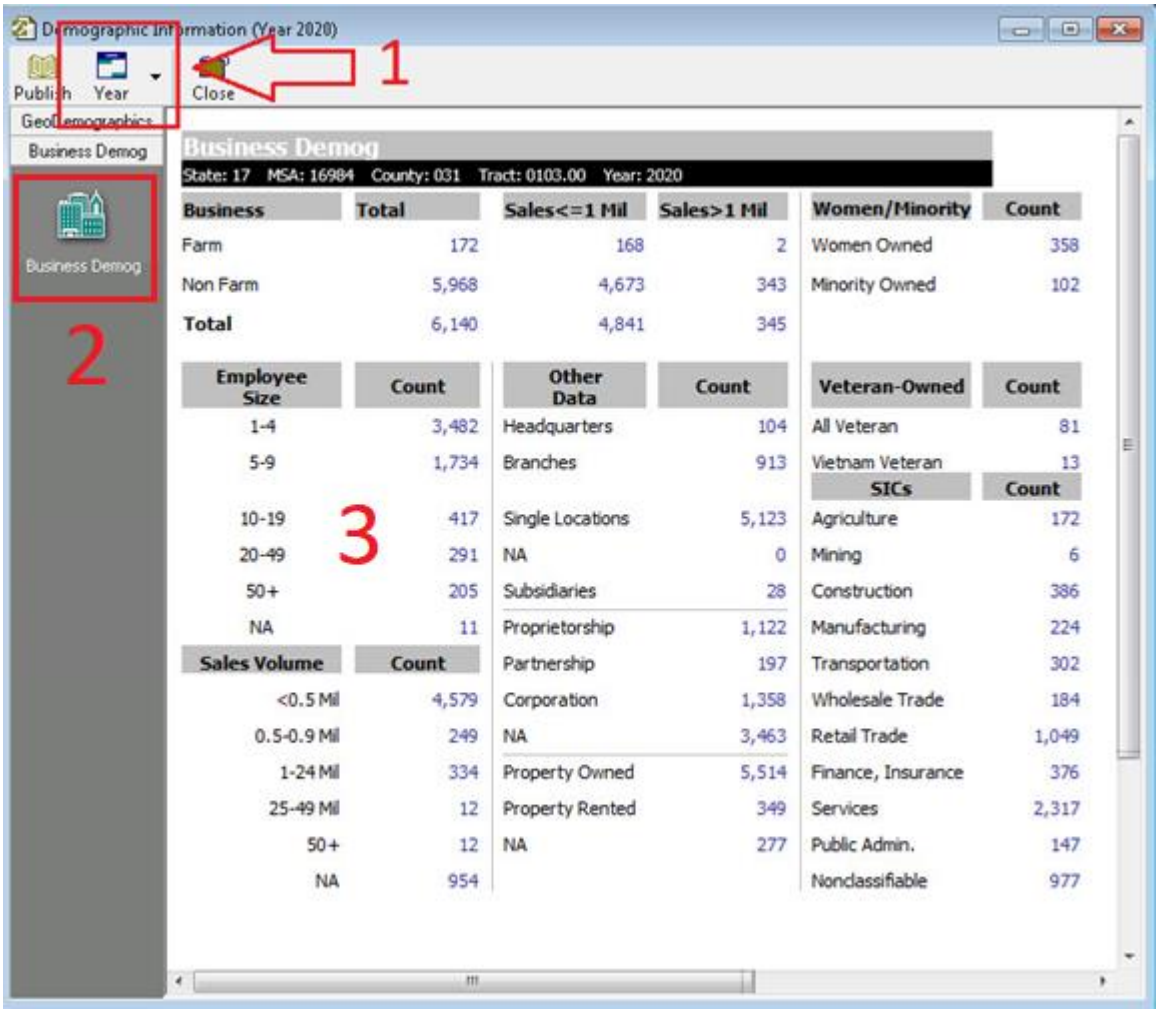
3 Confirming Installation

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**. Then choose **2020** from the dropdown (**1**) and you will see Business Demographics in the lower left corner:



Business	Total	Sales<=1 Mil	Sales>1 Mil
Farm	172	168	2
Non Farm	5,968	4,673	343
Total	6,140	4,841	345

Women/Minority	Count
Women Owned	358
Minority Owned	102

Employee Size	Count
1-4	3,482
5-9	1,734
10-19	417
20-49	291
50+	205
NA	11

Other Data	Count
Headquarters	104
Branches	913
Single Locations	5,123
NA	0
Subsidiaries	28
Proprietorship	1,122
Partnership	197
Corporation	1,358
NA	3,463
Property Owned	5,514
Property Rented	349
NA	277

Veteran-Owned	Count
All Veteran	81
Vietnam Veteran	13

Sales Volume	Count
<0.5 Mil	4,579
0.5-0.9 Mil	249
1-24 Mil	334
25-49 Mil	12
50+	12
NA	954

SICs	Count
Agriculture	172
Mining	6
Construction	386
Manufacturing	224
Transportation	302
Wholesale Trade	184
Retail Trade	1,049
Finance, Insurance	376
Services	2,317
Public Admin.	147
Nonclassifiable	977

Once you've selected Business Demographics (**2**), you should see data to the right as shown above (**3**). 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 2020 Business Demographic Data installer.

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