

Installation Instructions and Release Notes

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Governance, Risk & Compliance

CRA *Wiz* and Fair Lending *Wiz*: 2022 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* **7.5 Service Pack 1 (SP1) 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 "75" 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 200MB (megabytes)

1.6 Space Consumed Approximately 40MB (megabytes)

1.7 Approximate install time Less than one (1) minute.

2 Installation Instructions

To install 2022 Business Demographic Data, follow these steps:

1. After downloading the update locally to your SQL Server, locate and double-click the **2022BusinessDemographicData** 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:

2022 Business Demographic Data	a Setup		×
	Welcome to the 2022 Busines	Demographic Data t ded that you make s	Data Setup Program to your existing CRA Wiz and Fair Lending sure all users are logged out of CRA Wiz
InstallShield	< <u>B</u> ack	(<u>N</u> ext >	Cancel

The software displays the SQL Server Login screen.

2.2 SQL Server Login Screen

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

2022 Business Demographic Data	etup	×
Database Server Login		
Select database server and auth	entication method	
	Database server that you are installing to: Connect using:	✓
InstallShield	< <u>B</u> ack <u>N</u> ext >	Cancel

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

Database server that you are installing to:	
<server name="">\<instance name=""></instance></server>	•
	Browse

- 2. 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:

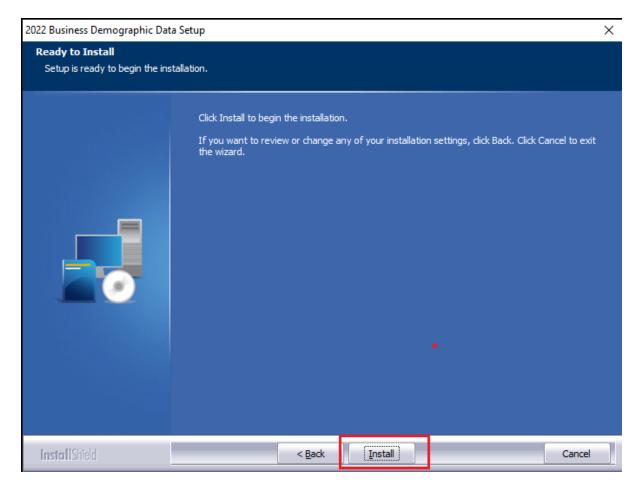
3. Click the **Next** button:

< <u>B</u> ack	Next >	Cancel

The software displays the Ready to Install the Program screen.

2.3 Ready to Install Screen

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



The installer displays the Setup Status screen.

2.4 Setup Status Screen

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

2022 Business Demographic Data Setup		
Setup Status		
	Performance Context Data is configuring your new software installation. Executing SQL Script: InstallBusinessDemog.sql	
InstallShield		Cancel

2.5 Setup Complete Screen

Click the **Finish** button:

2022 Business Demographic Data Setup

	Setup Complete
	Setup has successfully installed the 2022 Business Demographic Data to your CRA Wiz and Fair Lending Wiz server.
	Click Finish to complete setup
InstallShield	< Back Finish Cancel

Installation is complete.

3 Confirming Installation

Once the installation is complete, you can verify the installation by selecting the **Create Areas** button in the CRA *Wiz* and Fair Lending *Wiz* **sidebar**. You will also need to set Census boundaries to **2020**, located in the **Options** menu bar item.

In **Create Areas**, right-click on a demographic area and choose **Show Demographics**. The software displays the **Demographic Information (Year 20XX)** screen in a new window. Then choose **2022** from the **Year** dropdown (**1**):

🔊 Demographic	Information (Year 202	22)					_	×
ı ī.] ≥* ∽_ 1							
Publish Year	Close							
GeoDemographics Business Demog		mog						~
Business Demog	Assessment Area Na	me: [New] Year	2022					
	Business	Total	Sales<=1 Mil	Sales>1 Mil	Women/Minority	Count		
	Farm	234	230	1	Women Owned	376		
Business Demog	Non Farm	8,471	7,168	316	Minority Owned	96		
3	Total	8,705	7,398	317				
	Employee Size	Count	Other Data	Count	Veteran-Owned	Count		
	1-4	5,142	Headquarters	109	All Veteran	73		
	5-9	2,799	Branches	932	Vietnam Veteran SICs	3 Count		
	10-19 🗸	376	Single Locations	7,664	Agriculture	234		
	20-49	214	NA	0	Mining	4		
	50+	150	Subsidiaries	30	Construction	535		
	NA	24	Proprietorship	1,160	Manufacturing	264		
·	Sales Volume	Count	Partnership	243	Transportation	450		
	<0.5 Mil	7,160	Corporation	2,183	Wholesale Trade	246		
	0.5-0.9 Mil	238	NA	5,119	Retail Trade	1,232		
	1-24 Mil	293	Property Owned	8,124	Finance, Insurance	695		
	25-49 Mil	11	Property Rented	336	Services	3,035		
	50+	13	NA	245	Public Admin.	152		
	NA	990			Nonclassifiable	1,858		
								~
	<							>

In the sidebar on the left side of the window, click the **Business Demog** slider button (**2**), then click the **Business Demog** button (**3**), and you should see data to the right as shown above (**4**). If the software displays zeroes (0s), 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 2022 Business Demographic Data installer.

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