

Installation Instructions and  
Release Notes

August 2022

Governance, Risk & Compliance

# CRA *Wiz* and Fair Lending *Wiz*: 2022 Business Demographic Data

# Content

<b>1</b>	<b>Overview</b>	<b>3</b>
1.1	Data Source	3
1.2	Who Should Install	3
1.3	Prerequisites	3
1.4	Required permissions	3
1.5	Required free space	3
1.6	Space Consumed	3
1.7	Approximate install time	3
<b>2</b>	<b>Installation Instructions</b>	<b>4</b>
2.1	Welcome Screen	4
2.2	SQL Server Login Screen	5
2.3	Ready to Install Screen	7
2.4	Setup Status Screen	8
2.5	Setup Complete Screen	9
<b>3</b>	<b>Confirming Installation</b>	<b>10</b>

# 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:

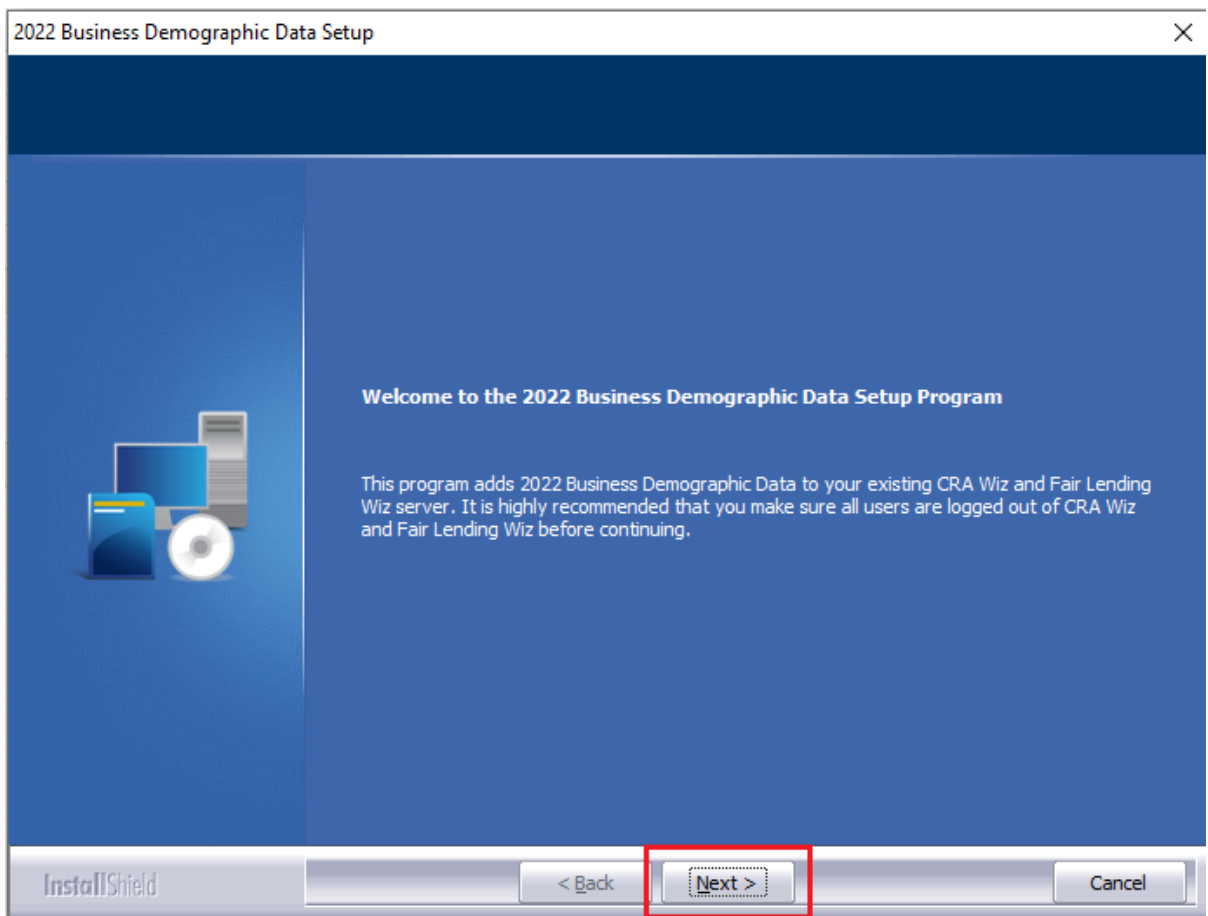
1. After downloading the update locally to your SQL Server, locate and double-click the **2022BusinessDemographicData** installation file.

The installer displays the **Welcome** screen.

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

### 2.1 Welcome Screen

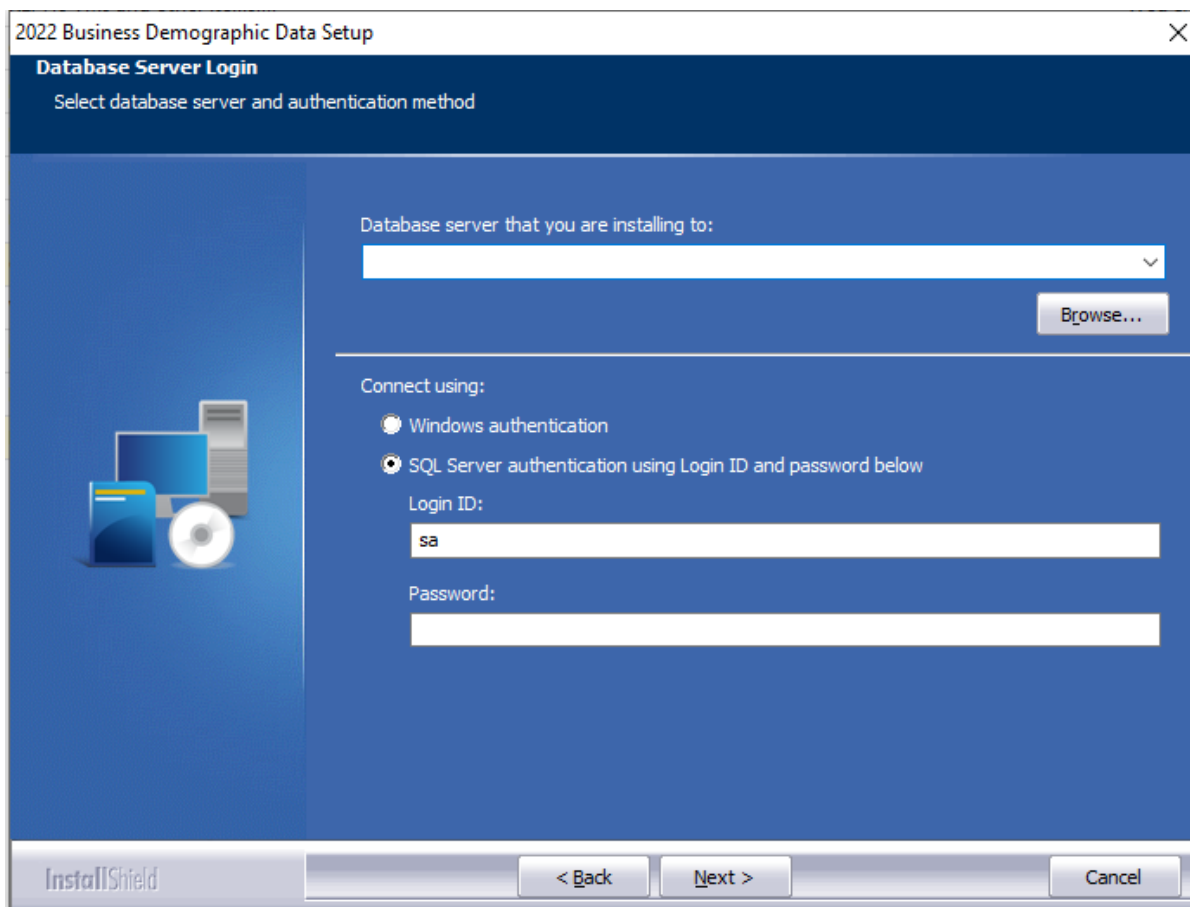
Click the **Next** button:



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

## 2.2 SQL Server Login Screen

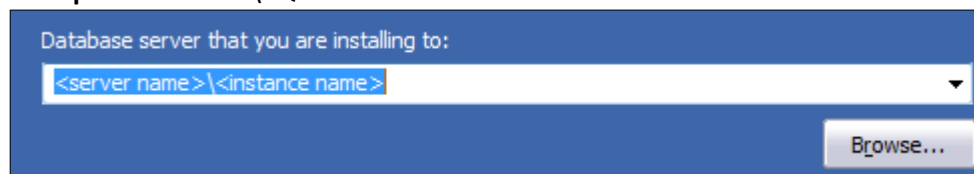
Use this screen to enter the name of the **SQL Server** and to configure authentication options:



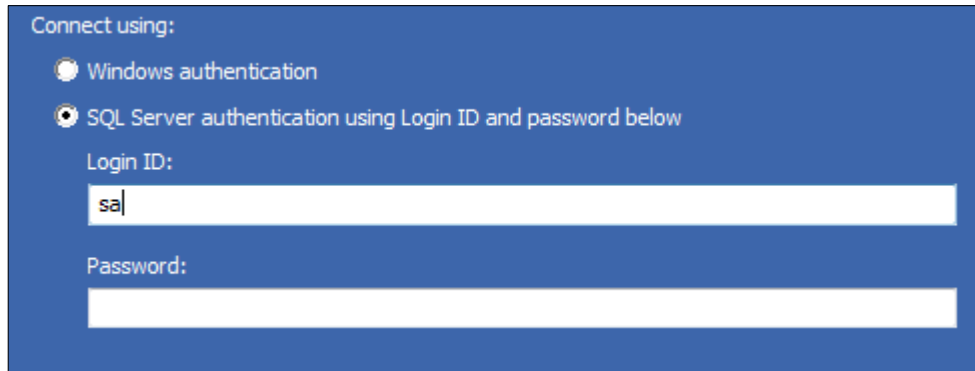
**Note:** The software displays the Database Server Login screen only if the computer on which you are installing the update is running **SQL Server**. If the installer does not detect SQL Server on your computer, the installer displays the screen.

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:
  - 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

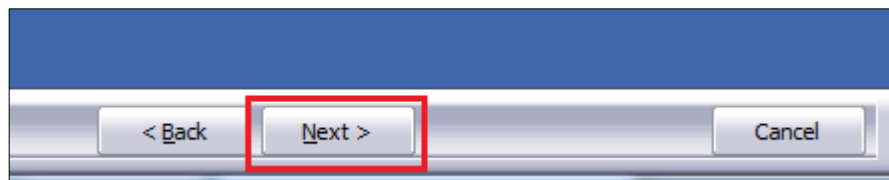
SQL Server authentication using Login ID and password below

Login ID:

sa

Password:

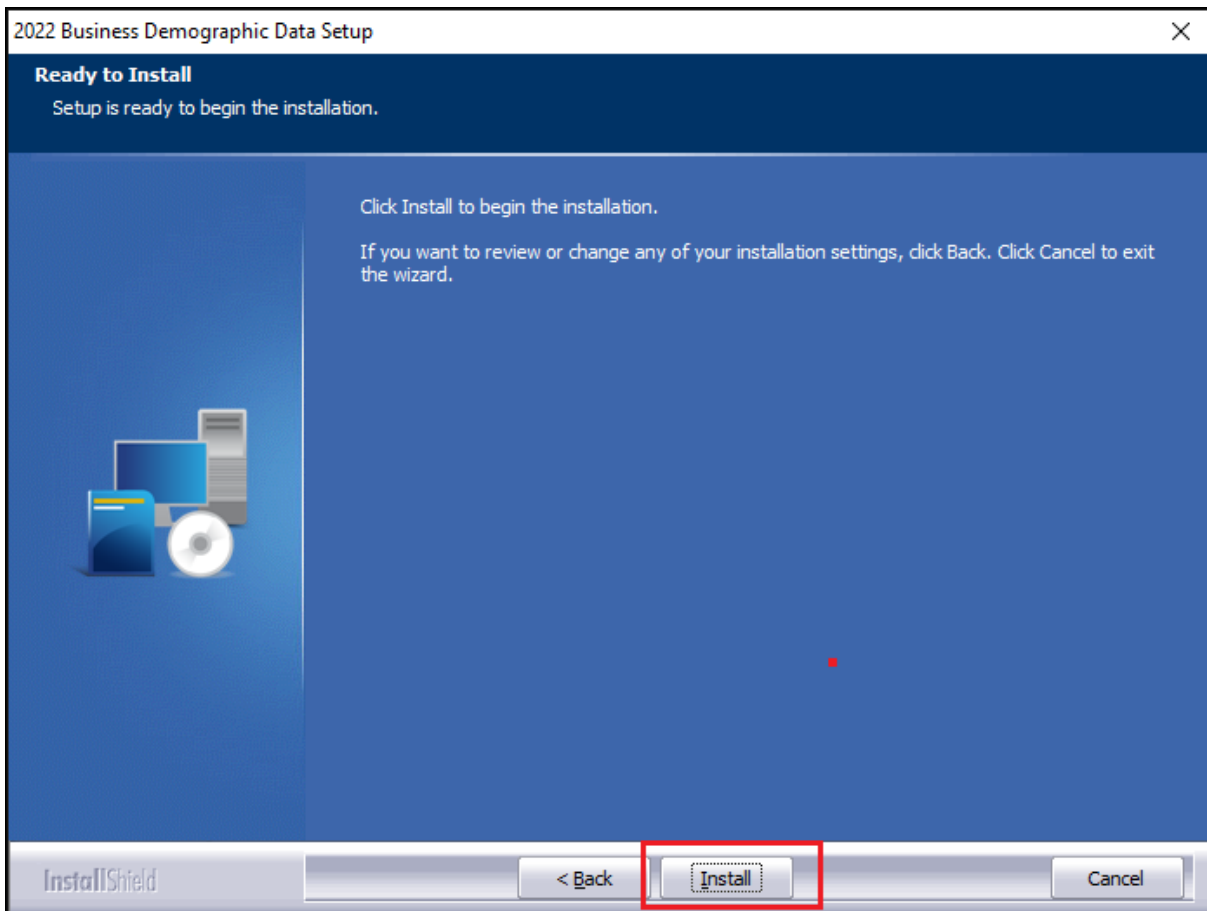
3. Click the **Next** button:



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

## 2.3 Ready to Install Screen

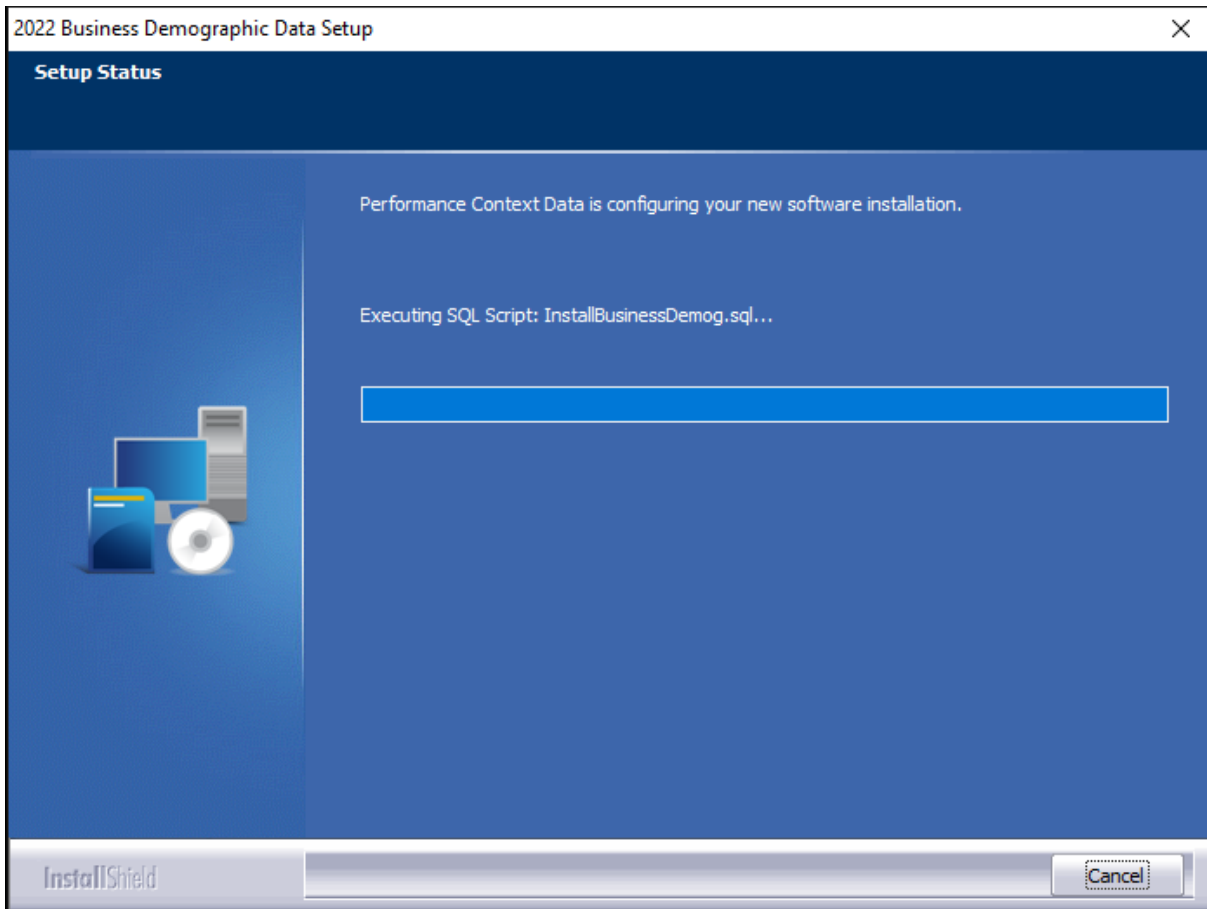
To begin installing the data sets, click the **Install** button:



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

## 2.4 Setup Status Screen

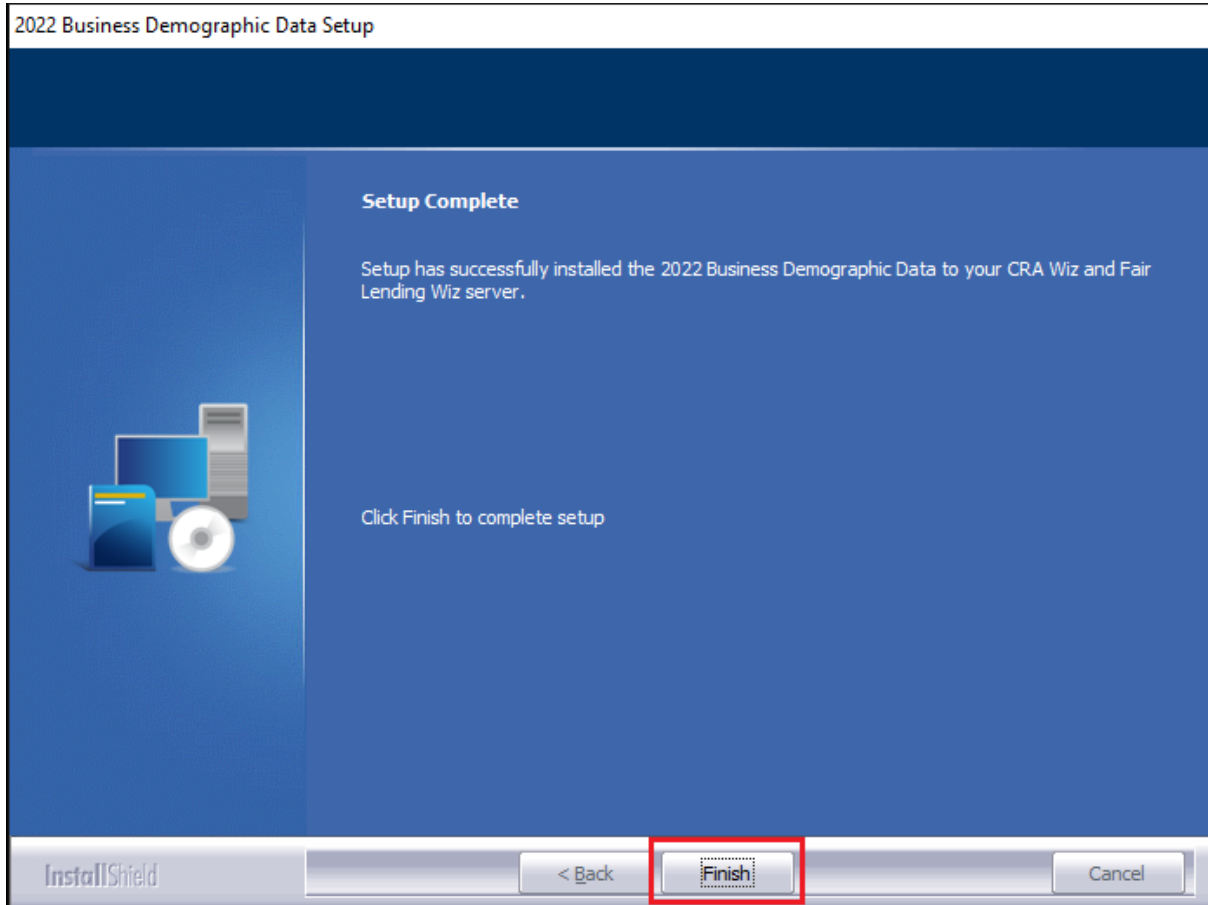
The **Setup Status** screen displays a progress bar that reports the progress of the installation:





## 2.5 Setup Complete Screen

Click the **Finish** button:

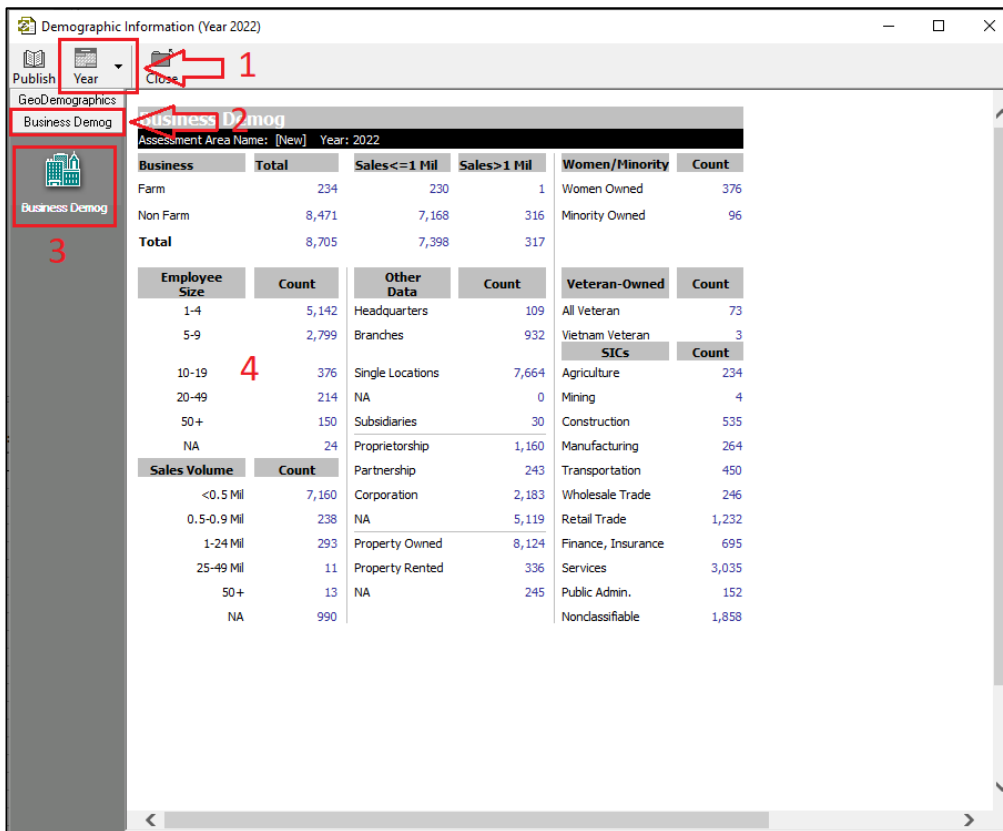


Installation is complete.

### 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**):



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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