

Installation Instructions and
Release Notes

July 2023

Governance, Risk & Compliance

CRA *Wiz* and Fair Lending *Wiz*: 2023 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* 7.6 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 "76" 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 400MB (megabytes)

1.6 Space Consumed

Approximately 80MB (megabytes)

1.7 Approximate install time

Two (2) minutes

2 Installation Instructions

To install 2023 Business Demographic Data, follow these steps:

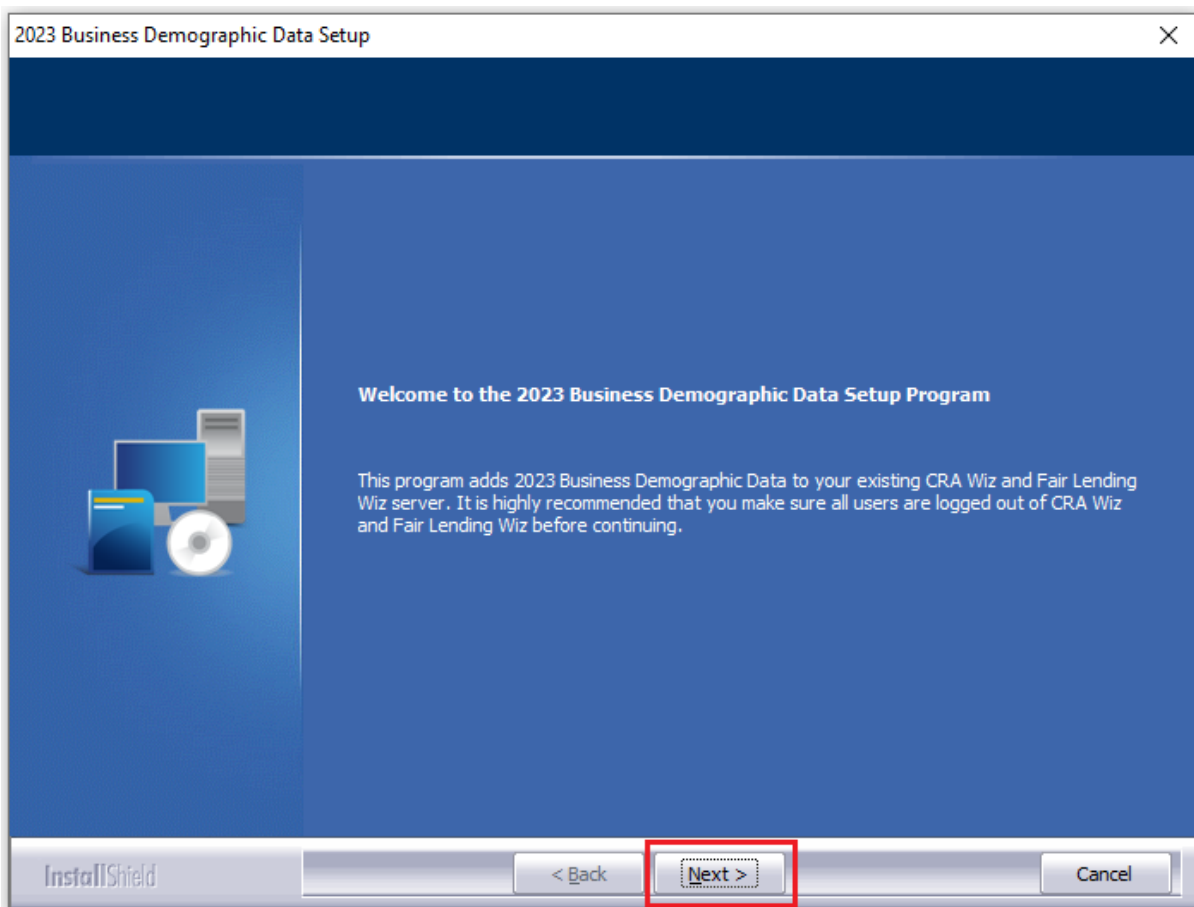
1. After downloading the update locally to your SQL Server, locate and double-click the **2023BusinessDemographicData** installation file.

The installer displays the **Welcome** screen.

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

2.1 Welcome Screen

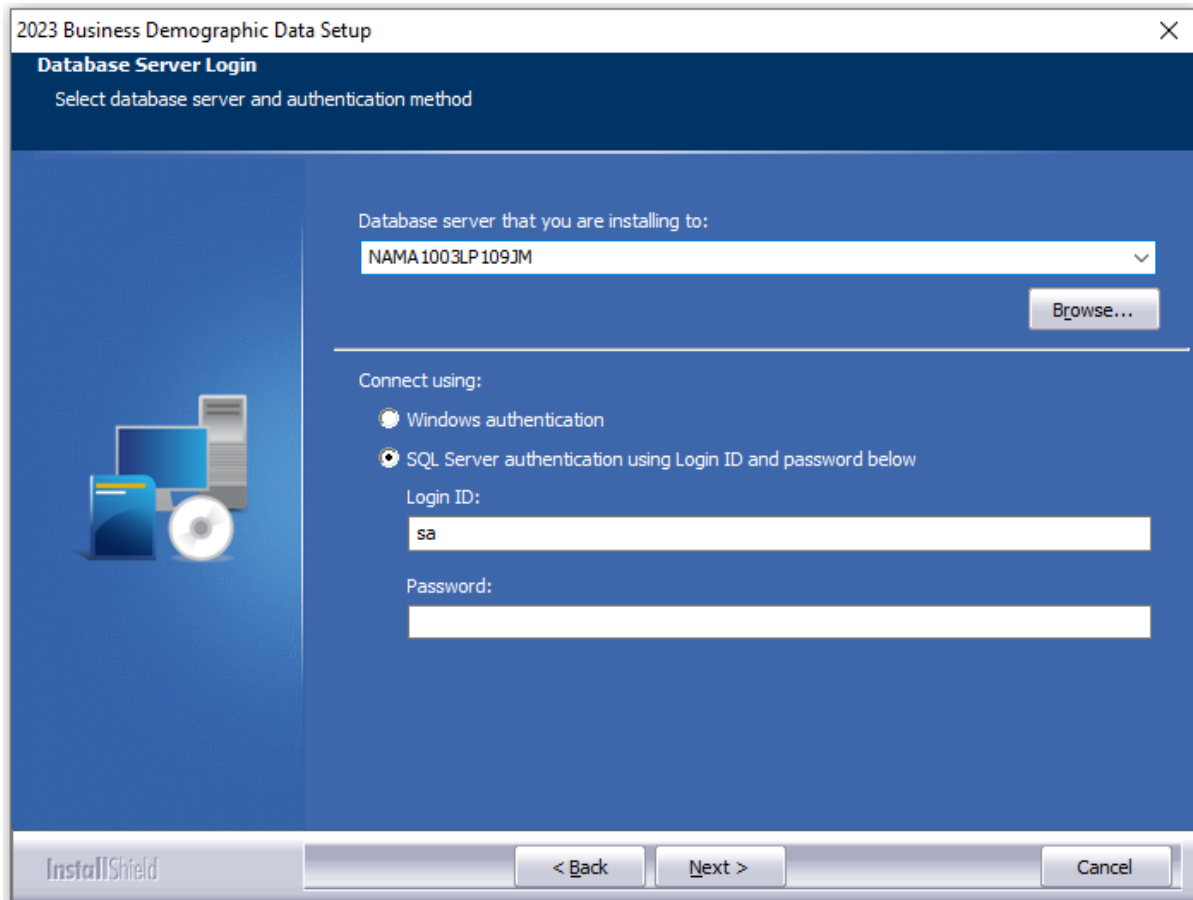
Click the **Next** button:



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

2.2 SQL Server Login Screen

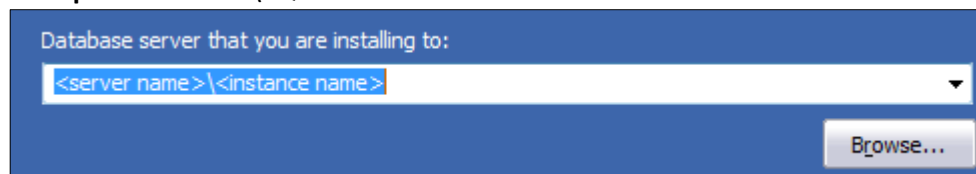
Use this screen to enter the name of the **SQL Server** and to configure authentication options:



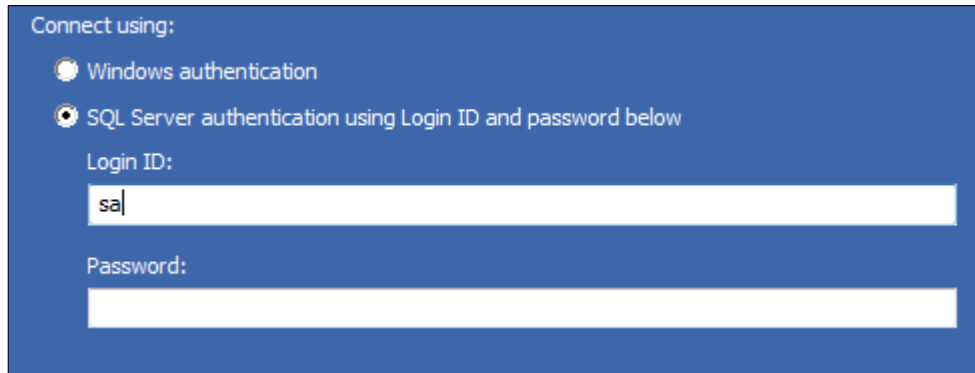
Note: The software displays the Database Server Login screen only if the computer on which you are installing the update is running **SQL Server**. If the installer does not detect SQL Server on your computer, the installer displays the screen.

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

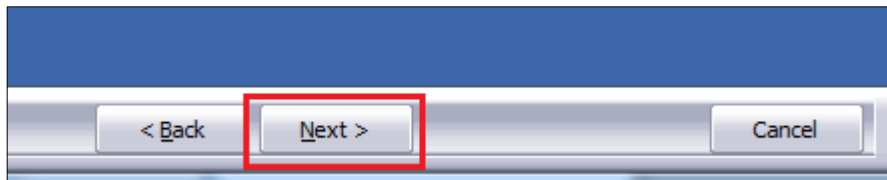
SQL Server authentication using Login ID and password below

Login ID:

sa

Password:

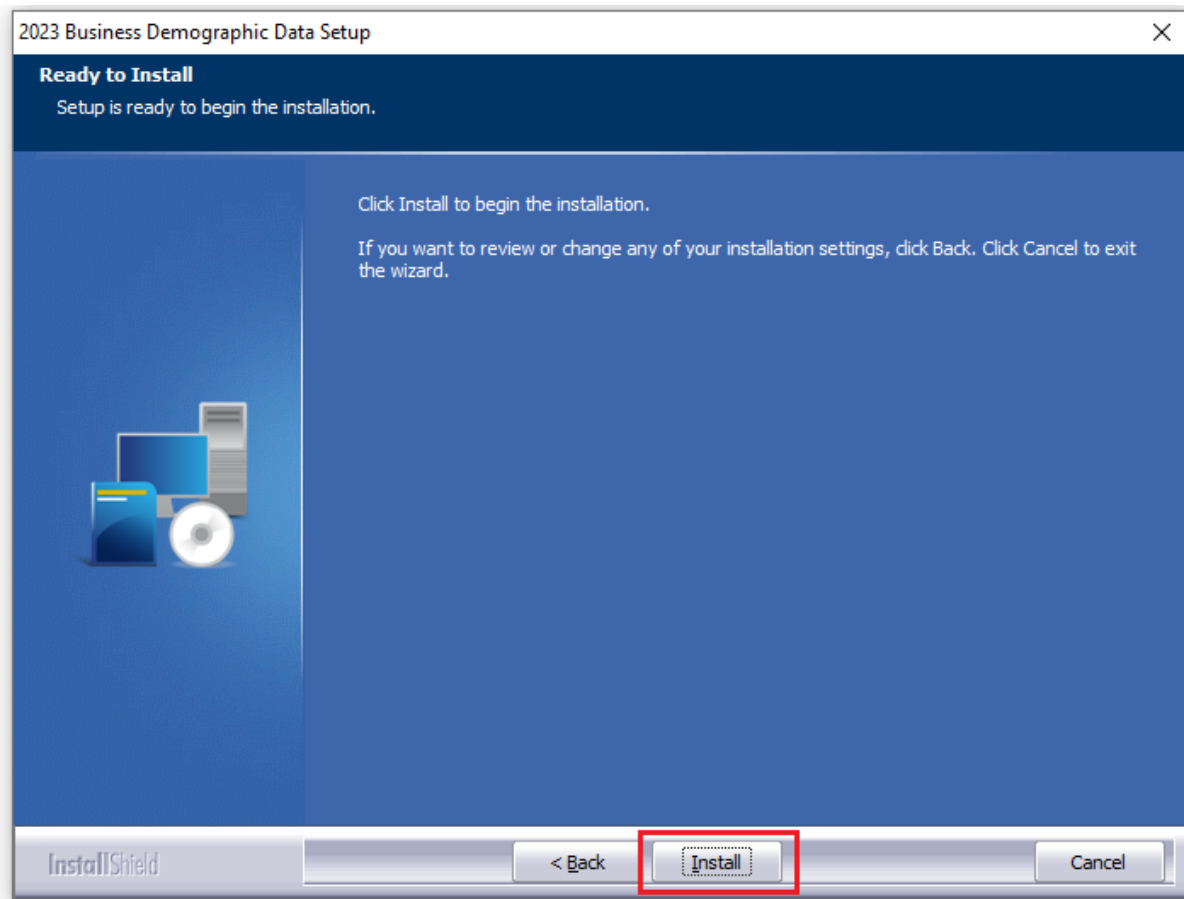
3. Click the **Next** button:



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

2.3 Ready to Install Screen

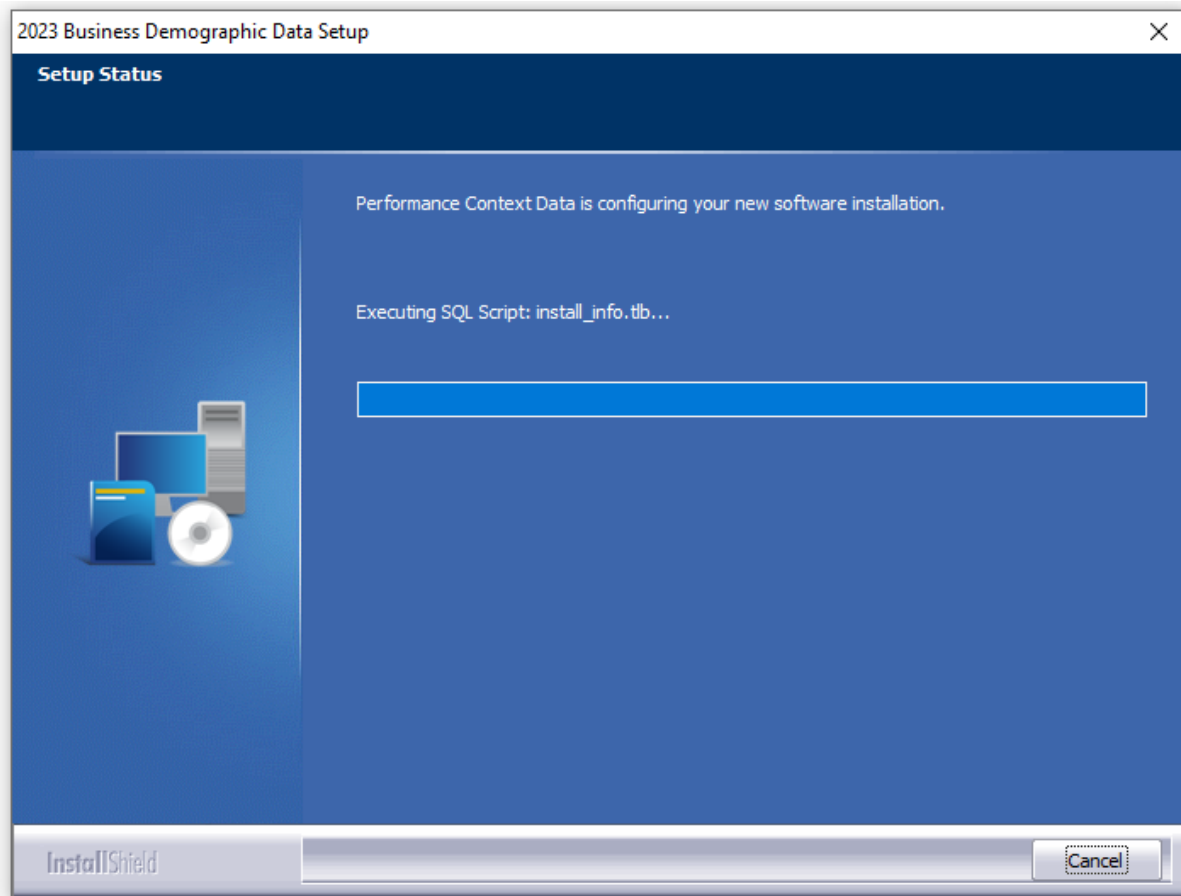
To begin installing the data sets, click the **Install** button:



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

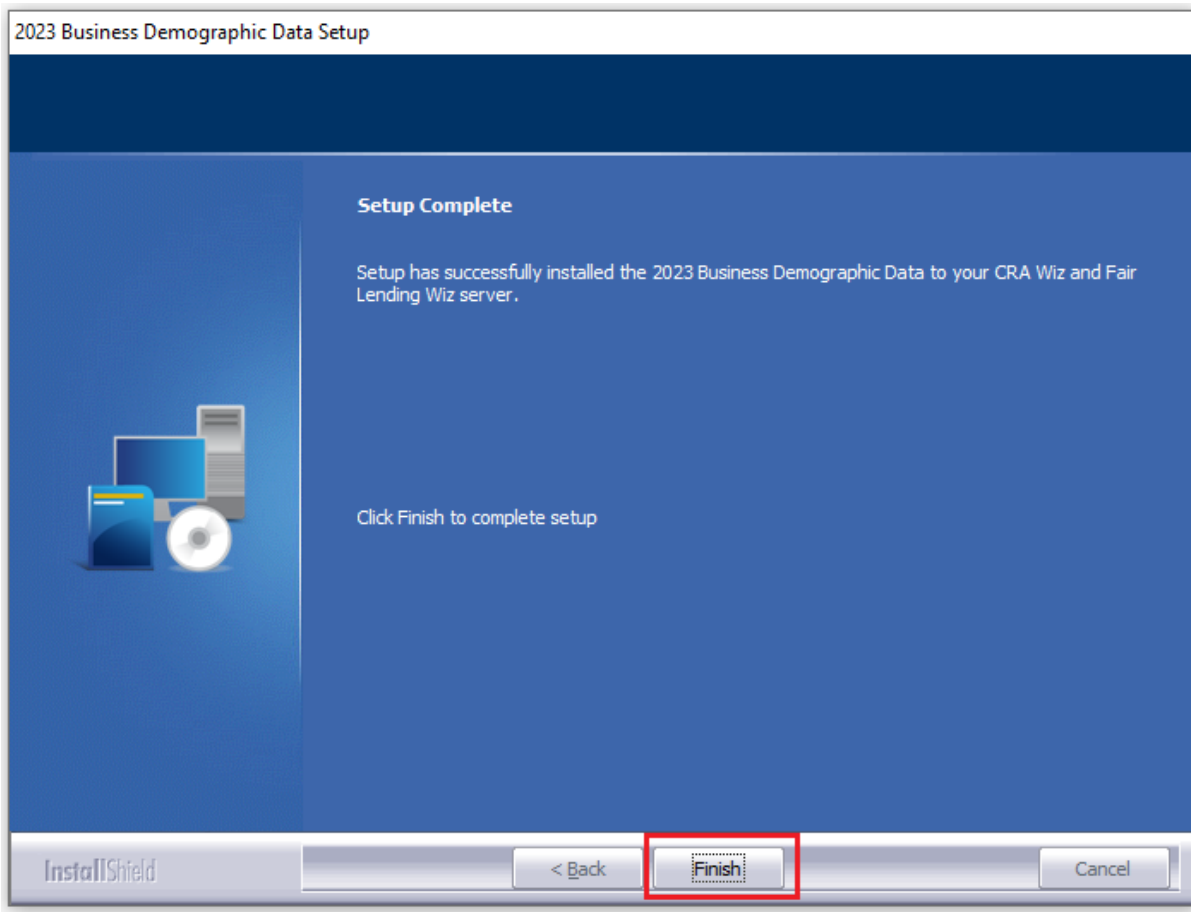
2.4 Setup Status Screen

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 **2023** from the **Year** dropdown (**1**):

Business	Total	Sales<=1 Mil	Sales>1 Mil	Women/Minority	Count
Farm	262	255	1	Women Owned	381
Non Farm	9,071	7,682	305	Minority Owned	103
Total	9,333	7,937	306		

Employee Size	Count	Other Data	Count	Veteran-Owned	Count
1-4	5,712	Headquarters	111	All Veteran	71
5-9	2,804	Branches	956	Vietnam Veteran	3
10-19	378	Single Locations	8,266	SICs	Count
20-49	222	NA	0	Agriculture	262
50+	146	Subsidiaries	32	Manufacturing	586
NA	71	Proprietorship	1,183	Transportation	282
Sales Volume	Count	Partnership	246	Wholesale Trade	279
<0.5 Mil	7,685	Corporation	2,485	Retail Trade	1,331
0.5-0.9 Mil	252	NA	5,419	Finance, Insurance	815
1-24 Mil	284	Property Owned	8,725	Services	3,280
25-49 Mil	9	Property Rented	340	Public Admin.	153
50+	13	NA	268	Nonclassifiable	1,838
NA	1,090				

Important! The above screenshot is for illustrative purposes only. To confirm installation, **you should select a region for which you are licensed.**

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 2023 Business Demographic Data installer.

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