Wolters Kluwer

Installation Instructions and Release Notes

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Financial and Corporate Compliance

CRA *Wiz* and Fair Lending *Wiz*:

2024 MSA Boundary and Connecticut County Release

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1 Overview

The **2024 MSA Boundary and Connecticut County Release** incorporates the recent **MSA boundary** and **Connecticut County** changes.

For more information about this update, please refer to the following document:

2024 MSA Connecticut County Changes Guide

Note:
This release is **not** required for **2023 Submission**.

Note:
There will be **future software releases** to also update the **Median Family Income** for **MSAs** and **Non-MSAs**. All Median Family Income data at the **MSA level** and **% Median Family Income** (i.e., tract income level) will be zero (0) until additional data is released by the FFIEC and processed by Wolters Kluwer.

New **Map Data** will be available in the future for the CRA *Wiz* and Fair Lending *Wiz* Mapper that will incorporate the following boundary changes:

- 2024 MSA
- 2024 County
- Any additional mapping data updates, as needed

Web Map boundary selection will be updated soon to include the following:

- 2024 Counties
- 2024 MSAs
- Demographic Data (after this has been released by FFIEC)

1.1 Who should install?

This install is required for all CRA Wiz and Fair Lending Wiz users.

1.2 Where to install

The update should be installed on the CRA *Wiz* and Fair Lending *Wiz* **Server**.
Note: There is **no** client update component to this release.

1.3 Prerequisites

Important!

- Confirm that the **CRA *Wiz* and Fair Lending *Wiz* 7.7** and the **CRA *Wiz* and Fair Lending *Wiz* 2024 FIG Changes and CRA Table Updates** are installed **prior** to this installation.
- For institutions that plan to install the **2020 Census Update for US Territories**, **please ensure this is also completed prior to this installation**.

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1.4 Required permissions

This update is a SQL Database update only, SQL Server admin login credentials are recommended.

1.5 Required disk free space and install times

- Minimum space: 1.6 GB (gigabytes)
- Installation time: 8-10 minutes
- Space: 900 MB (megabytes)

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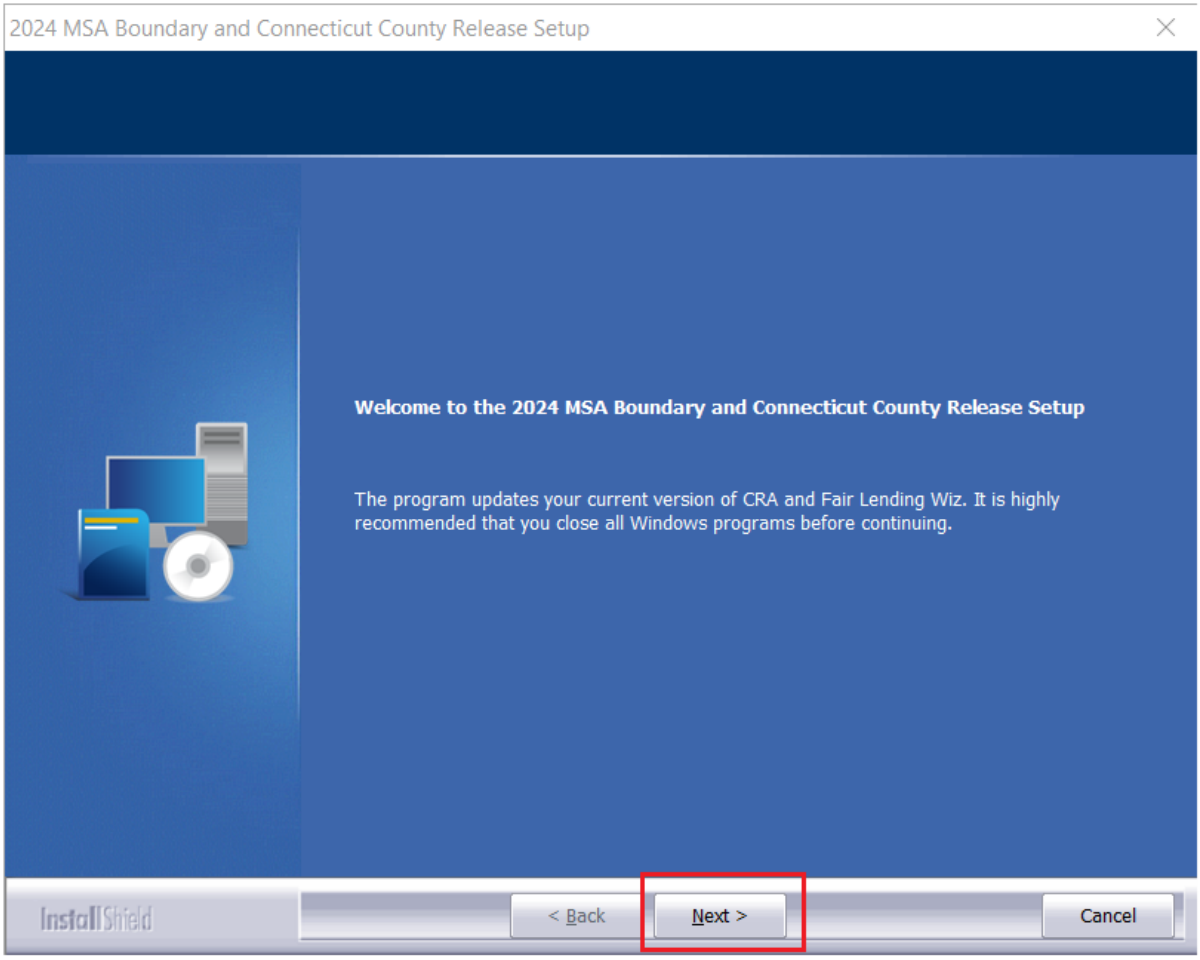
2 Installation Instructions

To install the **2024 MSA Boundary and Connecticut County Release**, do the following:

1. Run the **2024 MSA Boundary and CT Country Release.exe**.

   The installer displays the **Welcome** screen:



2. Click the **Next** button.
   The installer displays the **Database Server Login** screen:

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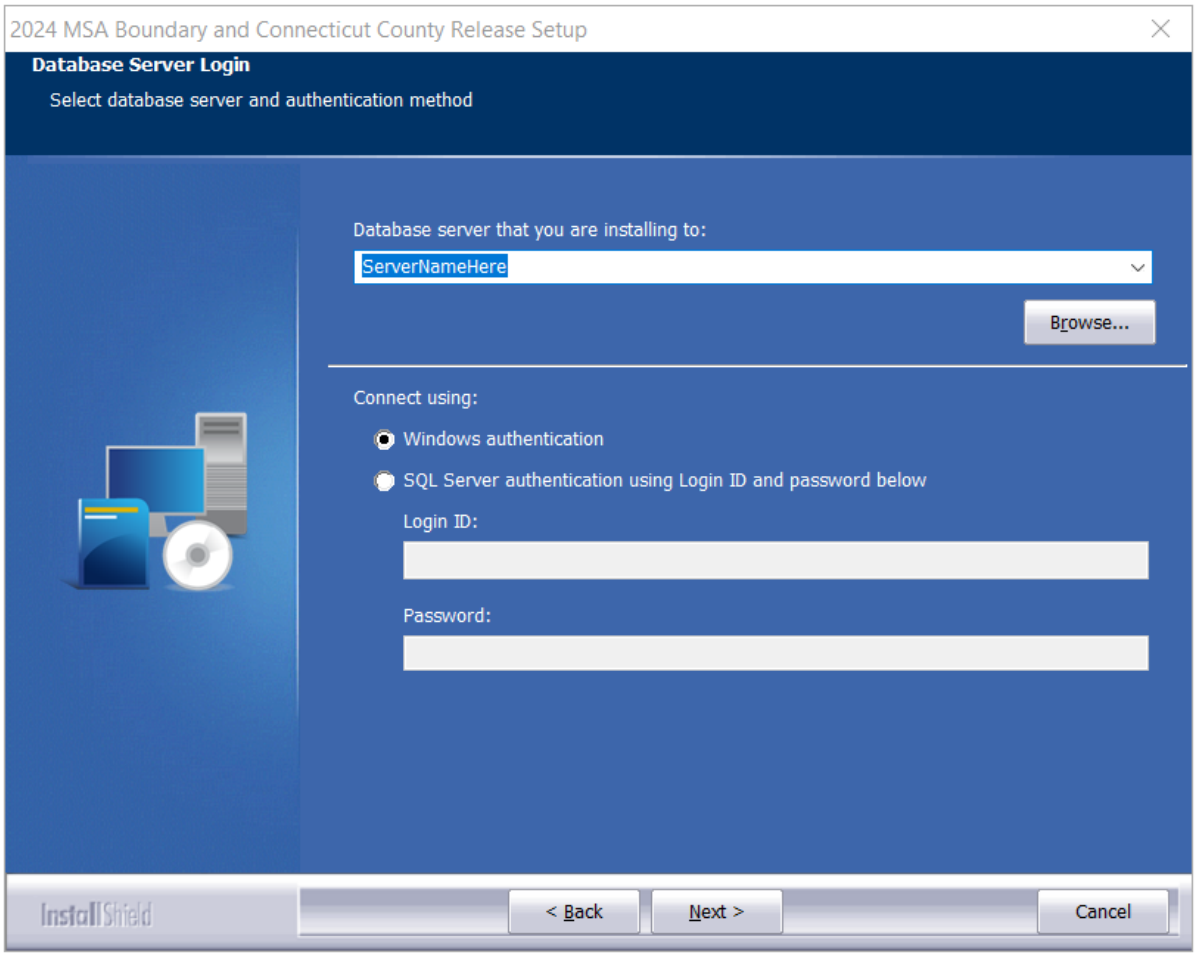

3. Do one of the following:
   - In the **Database server that you are installing to** field, enter the **SQL Server name and instance** to which you are installing the data.

     Example: SVRBOS01\SQLEXPRESS
   - Click the **Browse** button and in the resultant dialog box, select the SQL Server.

4. Choose one of the following authentication options:
   - Use Windows Authentication
   - Use SQL Server Authentication - If you select this option, you must also enter your SQL Server account **User Name** and **Password** in the **User Name** and **Password** fields.
5. Click the **Next** button.

   The software displays the **Ready to Install** screen:

6. In the **Ready to Install the Program** screen, click the **Install** button to start the installation:

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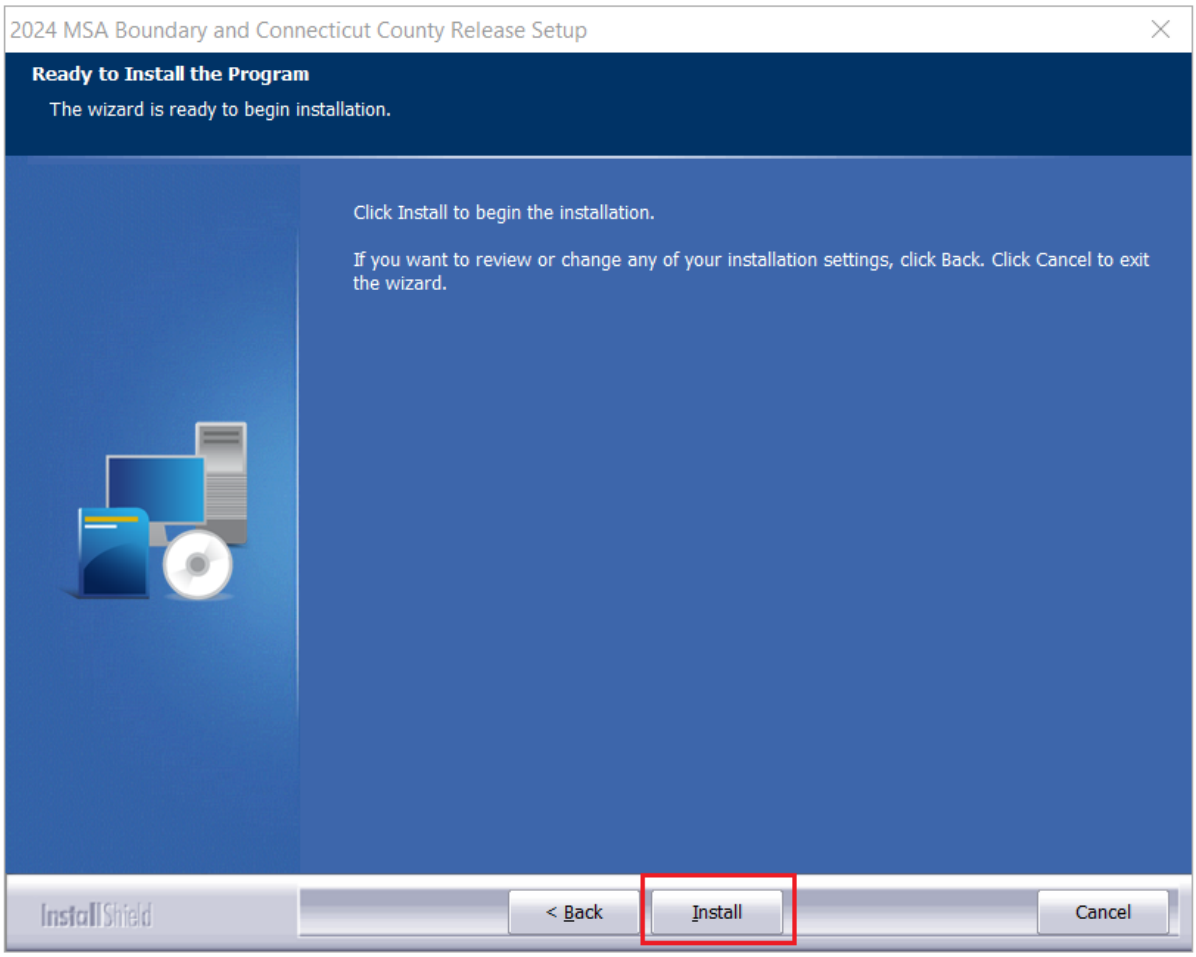

The installer displays the **Setup Status** screen:

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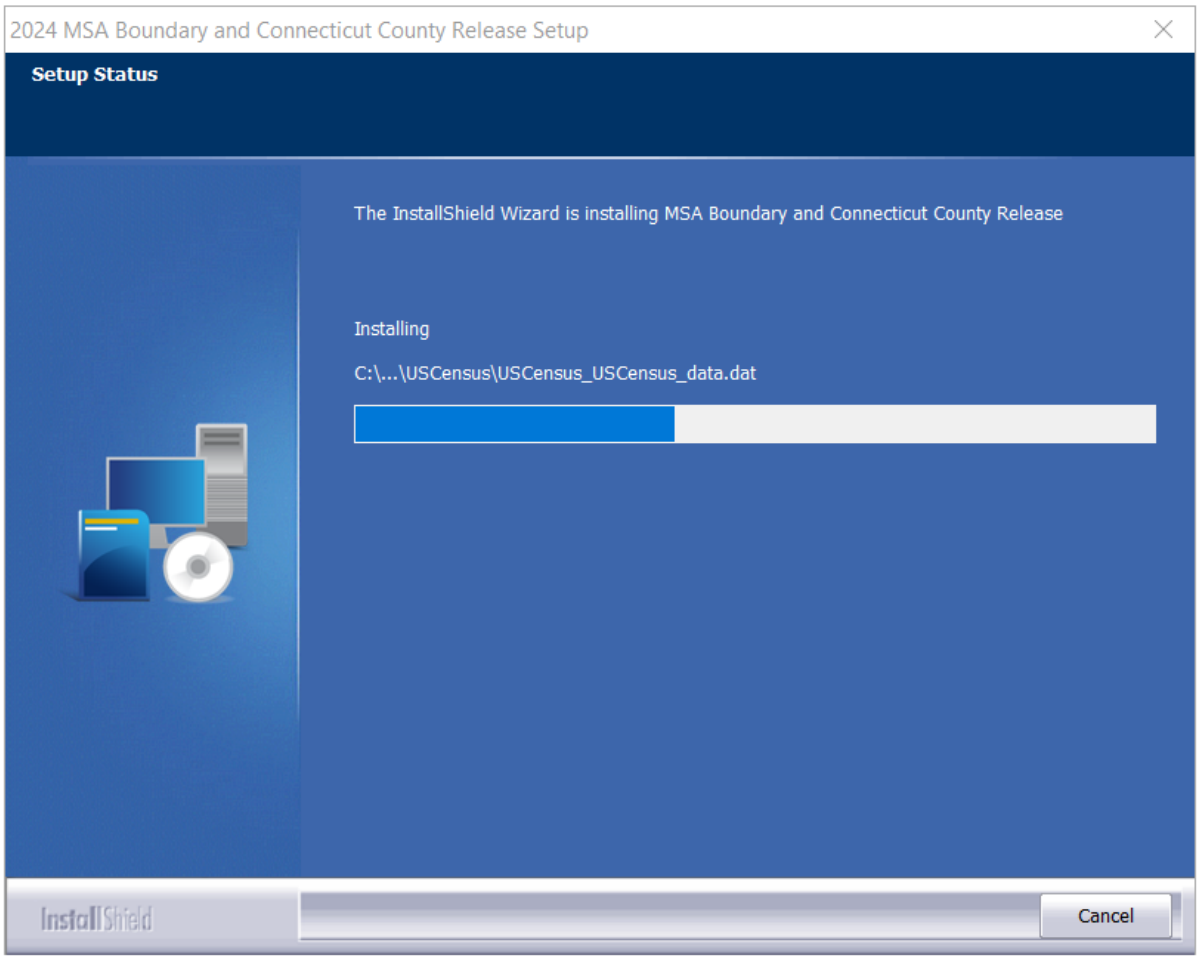

When installation is complete, the installer displays the **Finish** screen:

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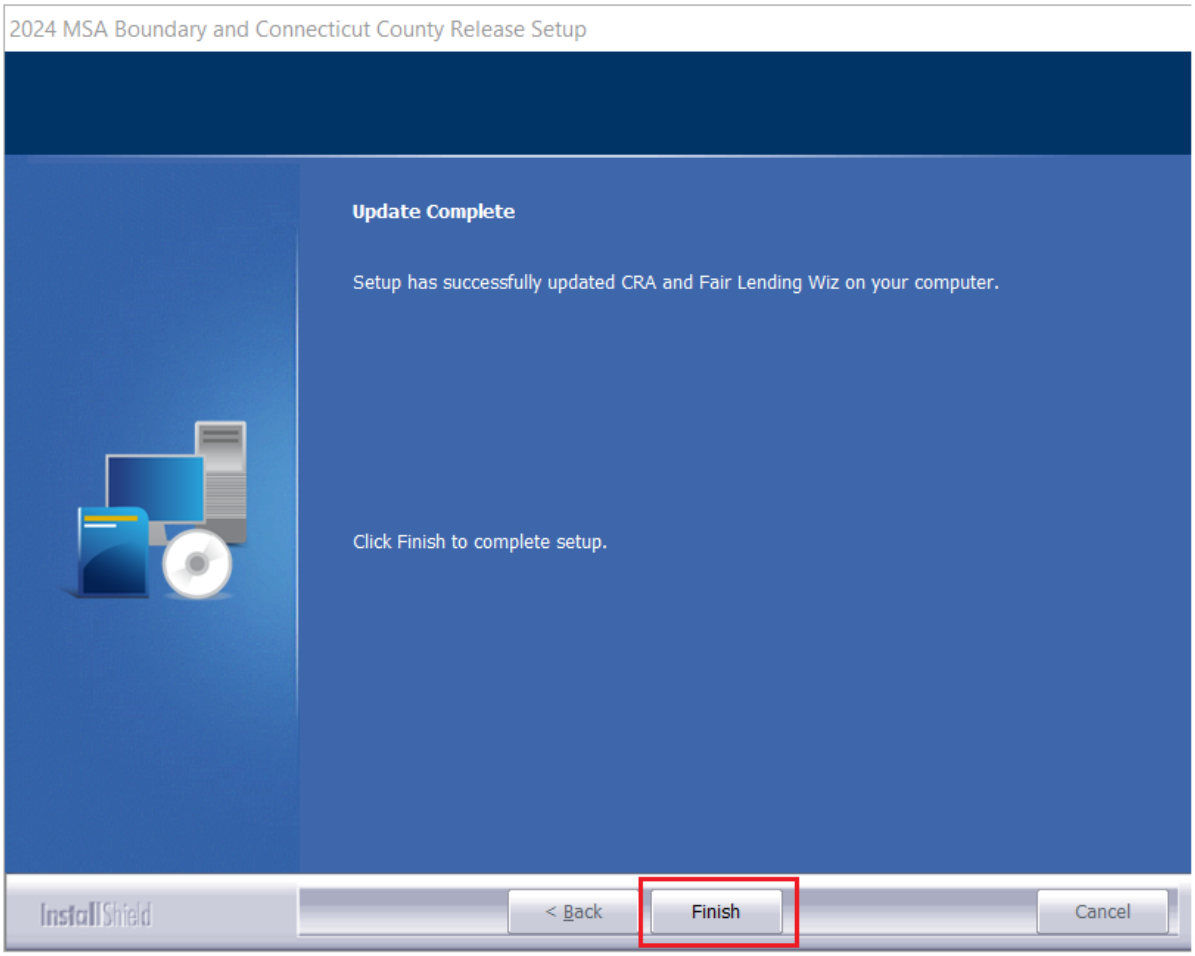

7. Click the **Finish** button to exit.

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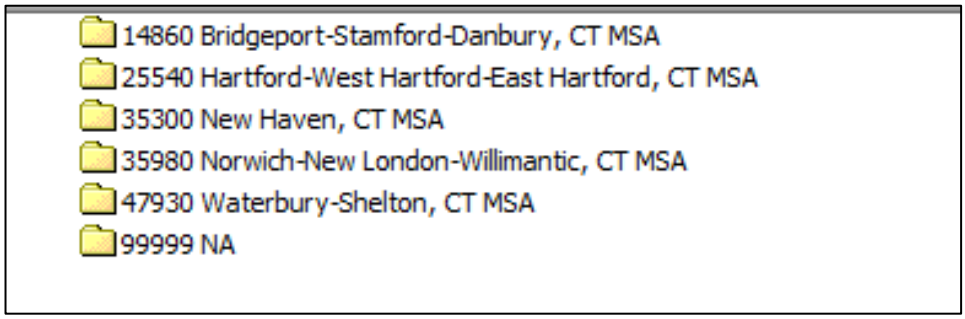
3 Confirming Installation

To confirm installation of the update, following these steps:

1. Navigate to **Analysis** >**Create Areas**.
2. Set Year to **2024**.
3. Select **US Areas**> **09 CT**.

The software should display the following:



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4 Important information about updating your data

4.1 Updating your Assessment Areas

For previously created Assessment Areas, review if there are any MSA changes and if any updates need to be made. If necessary, recreate areas that have boundary changes.

Important!
All Assessment Areas that include tracts in Connecticut will need to be recreated for 2024.

4.2 Making a copy of 2024 file(s)

This update has **zero** (0) values for **MSA Median Family Income** and **no** tract income categories.

If you would like to continue to analyze your 2024 data with 2023 data until the income data becomes available, **Wolters Kluwer recommends that you create a copy of your 2024 file** before making any updates.

To create a copy of your file, follow these steps:

1. In **File Management**, right-click on your file and from the contextual menu, select **Copy**.
2. Right-click in the white area below your list of files and from the contextual menu, select **Paste**.
   The software creates a copy of your file with **(001)** in the file name indicating the copy.

Important!
Once you update the LAR in 2024 for MSA Boundaries and Connecticut County changes, **the only way to set the year back to 2023 is to re-geocode the file and then select update calculated fields for the correct values in 2023.**

Making a copy of your file first is the most efficient way to use the current 2023 data for analysis.

4.3 Updating the LAR

There are three (3) ways to update your LAR:

1. From the Options menu, select Activity Year **2024**. Then, in **File Management**, right-click the file and select **Update Calculated Fields**. The software updates the file with the new boundaries and Connecticut Counties.

   Important!
   Do **not** select **Update County Codes.** Doing so will only update a portion of the data. (i.e., just the **County code** and not the **County_5** and **Tract_11**)

2. **Batch geocoding** your file automatically triggers updating of calculated fields so no further action needed.
3. When **single record geocoding**, select **Edit Check** after the record is geocoded to update the values.

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