CRA *Wiz* and Fair Lending *Wiz*

Installation Guide
V6.9

CRA Wiz and Fair Lending Wiz 6.9 Installation Instructions

The following installation instructions provide procedures for a **new** installation of CRA *Wiz* and Fair Lending *Wiz* 6.9.

To install the software, select from one of the following sets of procedures:

- Installing CRA Wiz and Fair Lending Wiz Workstation (page 11) - Follow these procedures if you want to install **CRA** *Wiz* **Server and Client** on a single computer (non-networked environment).
- Installing CRA Wiz and Fair Lending Wiz Server (page 20) - Follow these procedures if you want to install **CRA** *Wiz* **Server** on a computer that will serve CRA *Wiz* Clients in a networked environment.
- Installing CRA Wiz and Fair Lending Wiz Client (page 35) - Follow these procedures if you want to install **CRA** *Wiz* **Client** on a computer that will access a CRA *Wiz* Server computer in a networked environment.

The installation program DVD installs version 6.9 of the program. **It is strongly recommended that you exit all Windows programs and disable anti-virus software before running this installer.**

Wolters Kluwer Financial Services currently supports your CRA *Wiz* and Fair Lending *Wiz* 6.9 software using **MS SQL Server 2008 Standard, Enterprise**, and **Express** editions, with the SQL Server upgrade paths supported by Microsoft. This support is valid if you are using *Wiz* 6.6 SP2 and later versions. Microsoft **Vista** is supported.

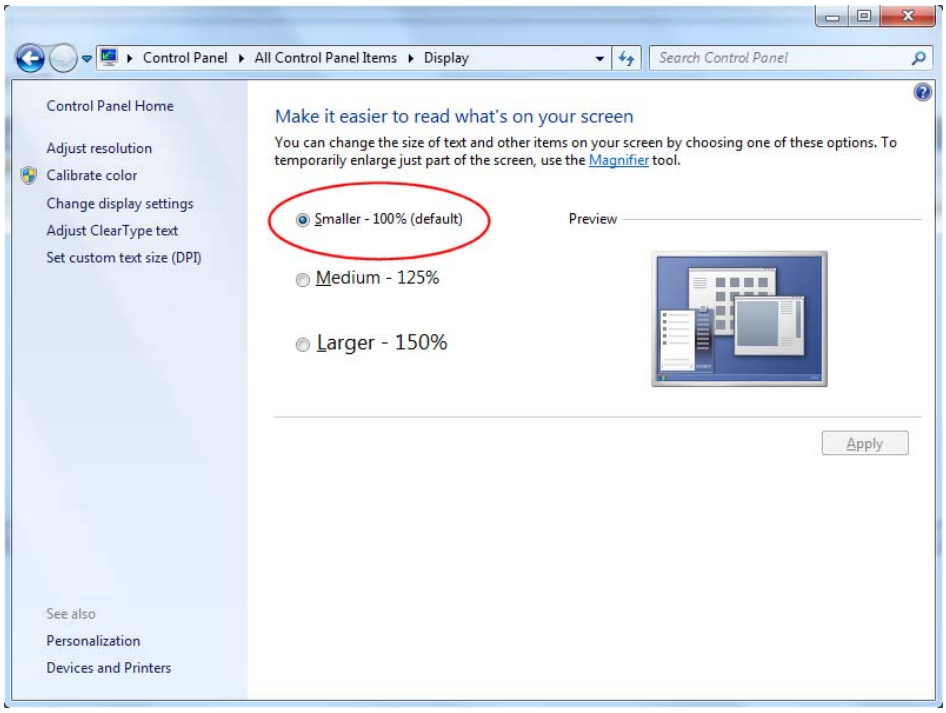
In Geocoding environments with a 64-bit SQL server, the Windows logon for the SQL Service must have administrative privileges.

Display Settings for Mapping in Windows 7 & Vista

Use of the new Mapper requires a specific setting for the Display option when using either the Windows 7 or Windows Vista operating systems. We recommend you confirm your settings in Windows Display before using the Mapping module.

Users can follow these steps to confirm display settings:

1. Click the Windows **Start** button.
2. Launch the **Control Panel**.
3. Click **Display**.
4. Ensure the **Smaller – 100%** option is selected:


Control Panel ▸ All Control Panel Items ▸ Display
Search Control Panel
Control Panel Home
Adjust resolution
Calibrate color
Change display settings
Adjust ClearType text
Set custom text size (DPI)
Make it easier to read what's on your screen
You can change the size of text and other items on your screen by choosing one of these options. To temporarily enlarge just part of the screen, use the Magnifier tool.
Smaller - 100% (default)
Medium - 125%
Larger - 150%
Preview
Apply
See also
Personalization
Devices and Printers

CRA *Wiz* and Fair Lending *Wiz* 6.9 requires the following:

Workstation Configuration

- ✓ Database - Microsoft SQL Server 2005 (Enterprise, Workgroup, Standard & Express)* or Microsoft SQL Server 2008 (Enterprise, Workgroup, Standard & Express)**
- ✓ Operating System - Windows XP Professional SP2 or later, Windows Vista Professional*, or Windows 7 Professional**
- ✓ RAM - Recommended: 4GB or greater (required: 2GB or greater)
- ✓ Free hard drive space - 20GB - 120GB or more (dependent on number of records, data products, and corresponding geography)
- ✓ Processor - Recommended: Dual-core processor--P4, 2GHz or faster. Required: Single-processor P4, 1Ghz or faster
- ✓ Browser - Internet Explorer Internet Explorer 10 (with backward compatibility mode).
- ✓ Resolution - Recommended: 1024 x 768 or higher; Required: 800 x600
- ✓ Recommended - Backup procedures.

Networked Client/Server Configuration

- ✓ Client
  - ✓ Operating System - Windows XP Professional SP2 or later, Windows Vista Professional*, or Windows 7 Professional**
  - ✓ RAM - Recommended: 4GB or greater. Required 2GB or greater:
  - ✓ Processor - Pentium 3, 600MHz or faster
  - ✓ Minimum free hard drive space - 10GB
  - ✓ Browser - Internet Explorer 6, Internet Explorer 7*, or Internet Explorer 8**
  - ✓ Resolution - Recommended: 1024 x 768 or higher; Required: 800 x 600
- ✓ Server
  - ✓ Database - Microsoft SQL Server 2005 (Enterprise, Workgroup, Standard & Express)* or Microsoft SQL Server 2008 (Enterprise, Workgroup, Standard & Express)**
  - ✓ Operating System - Windows 2003 Server* or Windows 2008 Server**
  - ✓ RAM - Recommended: 4GB or greater, dependent on number of records and users. Required: 2GB RAM or greater.
  - ✓ Processor - Recommended: dual-core processor, Pentium 4, 2GHz or faster. Required: single-processor Pentium 4, 1GHz or faster

- ✓ Free hard drive space - 20GB - 120GB, dependent on number of records, data products, and corresponding geography.
- ✓ Recommended - Backup procedures

✓ Network

- ✓ Recommended - Ethernet - 1000 Mbps connections between Client and Server machines. Required: 100 Mbps.

*Wolters Kluwer Financial Services supports this item if you are using *Wiz* 6.6 SP2 or later versions.

**Wolters Kluwer Financial Services supports this item if you are using *Wiz* 6.6 SP4 or later versions

✓ This DVD installs the following CRA Wiz and Fair Lending *Wiz* 6.9 software as needed:

- ✓ CRA *Wiz* and Fair Lending *Wiz* **Server**
- ✓ CRA *Wiz* and Fair Lending *Wiz* **Client**
- ✓ Sample data

Installing CRA *Wiz* and Fair Lending *Wiz* Workstation

If you want to use CRA *Wiz* and Fair Lending *Wiz* in a non-networked environment, you use the **Workstation** installation option. The Workstation installation installs the following components to the same target computer:

- ✓ CRA/FL *Wiz* Server
- ✓ CRA/FL *Wiz* Client

Use the following procedures if **SQL is already installed on the target computer** and you want to install CRA *Wiz* and Fair Lending *Wiz* **Server**, **Client**.

Important!
If you want to install CRA and *Wiz* and Fair Lending *Wiz* **data sets** (Address Data, Mapping Data, Peer Mortgage Data, etc) for which your are licensed, refer to the appropriate instructions for the data set.

Important:
For computers running Windows Vista, SQL 2005 is required. MSDE and SQL 2000 are no longer supported on Vista.

Important:
If SQL is **not** installed on the target computer, you can install SQL Server 2008 R2 SP2 Express Edition on the target computer by using the following links:

✓ Microsoft SQL Server 2008 R2 SP2 Express Edition:

http://www.microsoft.com/en-us/download/details.aspx?id=30438

✓ MSXML 6.0:

http://www.pcidownloads.com/CRAWiz/Updates/msxml6.msi

✓ Microsoft .NET Framework 3.5 Service Pack 1:

http://www.microsoft.com/en-us/download/details.aspx?id=22

Insert the **CRA *Wiz* and Fair Lending *Wiz* 6.9 Installation DVD** into the target computer's DVD drive.

✓ If the computer is configured to run auto execution files, the installer displays the **Welcome** screen.

✓ If the computer is not configured to run auto execution files (the installation program does not run automatically) do the following:

1. Select **Start**/**Run**.
2. Type **d:\setup.exe** in the **Run** dialog box.

   Note:
   If necessary, substitute the letter designating your DVD drive.

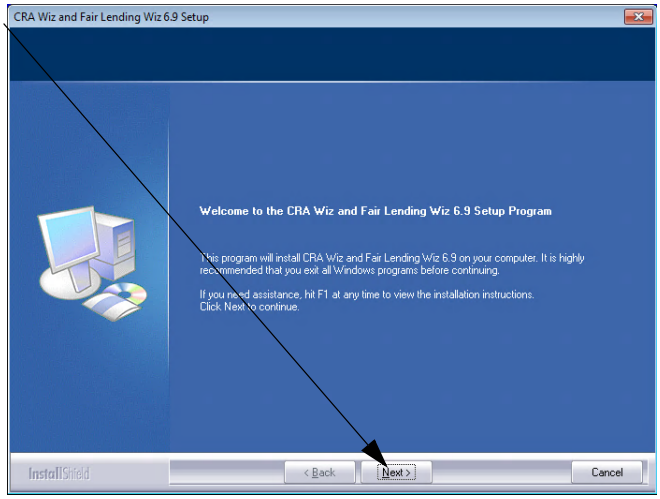
3. Click the **OK** button.

   The installer displays the **Welcome** screen.

Welcome Screen

Click the **Next** button.

The software displays the **Setup Type** screen



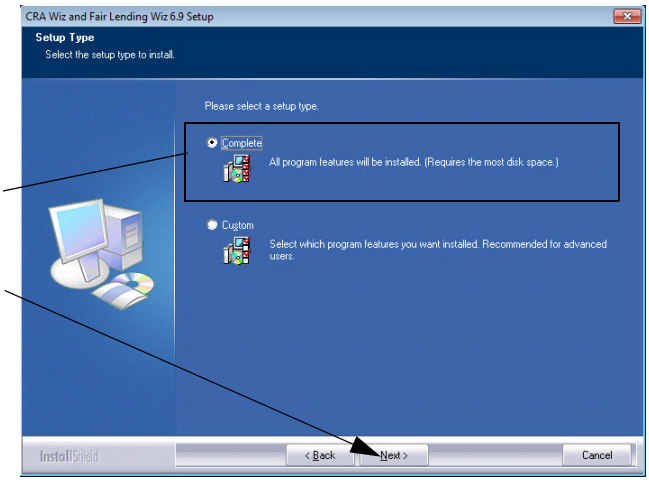
Setup Type Screen

You use the **Setup Type** screen to confirm which components you want to install.

Confirm the default option, **Complete**.

Click the **Next** button.

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



Database Server Login Screen

You use the **Database Server Login** screen to specify how you log into your SQL Server database (via Windows Authentication or SQL Server Authentication), and provide your SQL Server system administrator user name and password, if necessary.

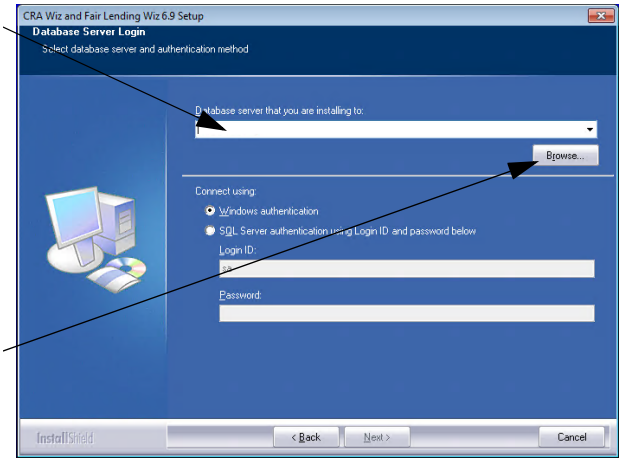
Note:
If you need information about SQL Server on the target computer, contact your institution's computer support staff.

To configure your SQL login information, follow these steps:

1. Do one of the following:

   ✓ In the **SQL Server** text field, enter the name of your SQL Server database.

   ✓ Click the **Browse** button and uses the resultant dialog box to manually locate and select your SQL Server database.



2. Do one of the following:

   ✓ Select the **Windows Authentication** option button if you log into SQL using this method. Windows Authentication indicates that you log into SQL using your Windows user account name and password.

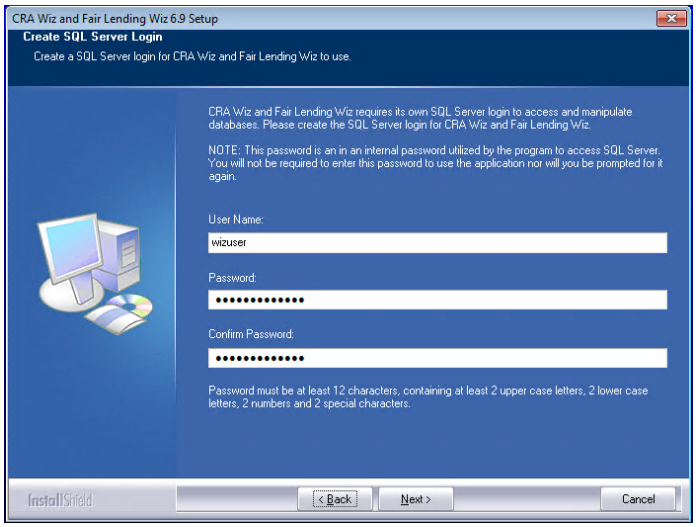
- ✓ Select Use **SQL Server Authentication** option button if you log into SQL using a SQL Administrative account user name and password. Then enter your SQL admin user name and password.

3. Click the **Next** button.

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

Create SQL Server Login Screen

You use the **Create SQL Server Login** screen to create a SQL Server account user name and password.



Note:
This step is optional. The installer provides a default user name and password, but you can modify the password (and/or user name) based on your institution's password requirements.

To create your SQL Server login information, follow these steps:

Note:
This screen displays only for first-time Server installations.

1. Enter the appropriate SQL Server account information in the following text fields:

   - ✓ **User Name** - Enter a SQL Server account user name.

   - ✓ **Password** - Enter a SQL Server account password.

✓ **Confirm Password** - Confirm the spelling of the password by re-typing it into this field.

Note:
Your password must have the following requirements:

- ✓ At least 12 characters long
- ✓ Contain at least two (2) **upper-case letters**
- ✓ Contain at least two (2) **lower-case letters**
- ✓ Contain at least two (2) **numbers**
- ✓ Contain at least two (2) **special characters** (such as #, %, @, etc).

If your password does not mean any of these criteria, the installer displays an error message.

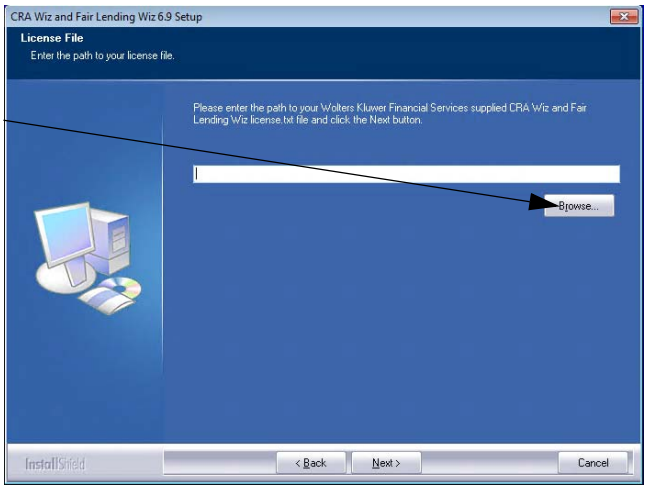
2. Click the **Next** button.

The software displays the **License File** screen.

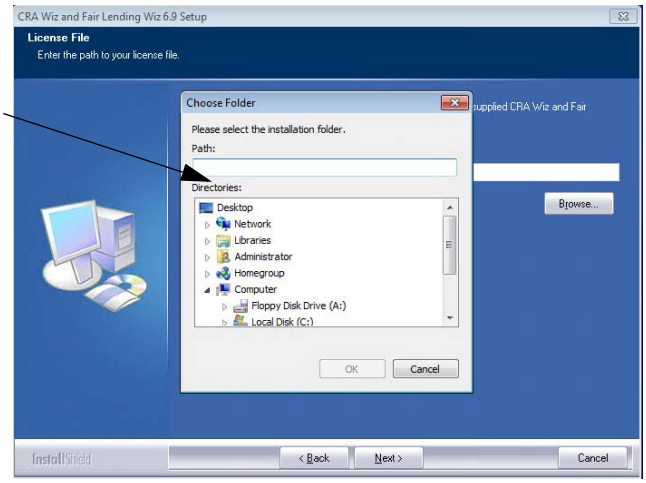
License File Screen

To license the software, follow these steps:

1. Click the **Browse** button.



2. Use the resultant dialog box to navigate to and select the license file provided by Wolters Kluwer Financial Services.



Note:
If you do not have a license file, please contact your Wolters Kluwer Financial Services Account Executive.

3. Click the **Next** button.

   The software displays the **Enter Authorization Number** screen.

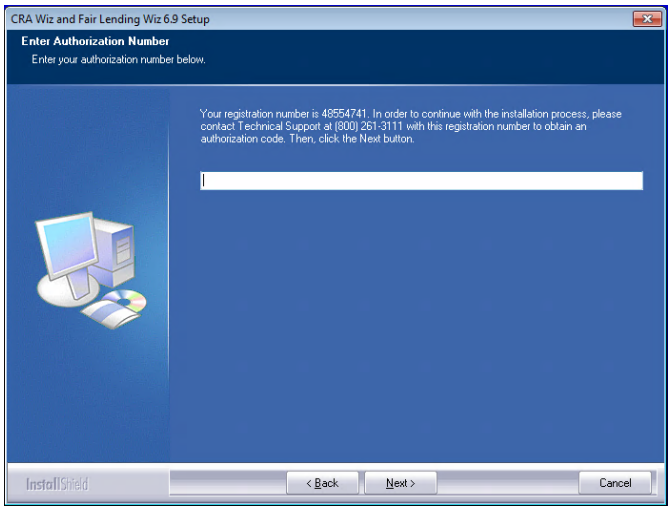
Enter Authorization Number Screen

You use the **Enter Authorization Number** screen to authorize the software.

To authorize CRA *Wiz* and Fair Lending *Wiz*, follow these steps:

1. Call Wolters Kluwer Finanical Services **Technical Support** to obtain an authorization number (have your registration number available; this number displays on the screen).

   The phone number is **(800) 261-3111**. When prompted, select option **1**.

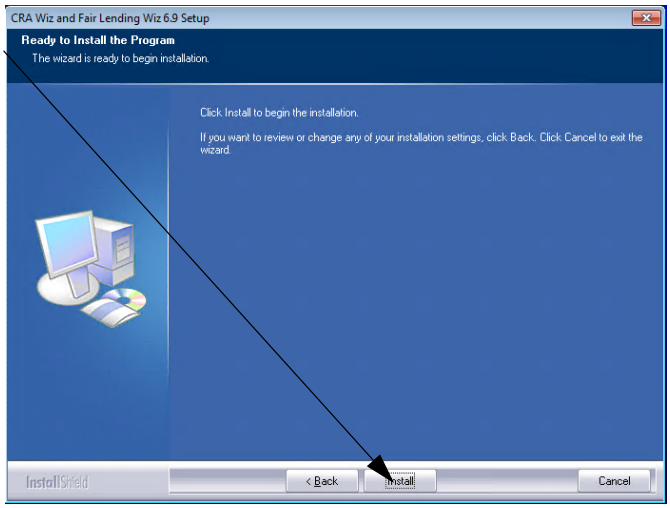


2. After you enter the authorization number, click the **Next** button.

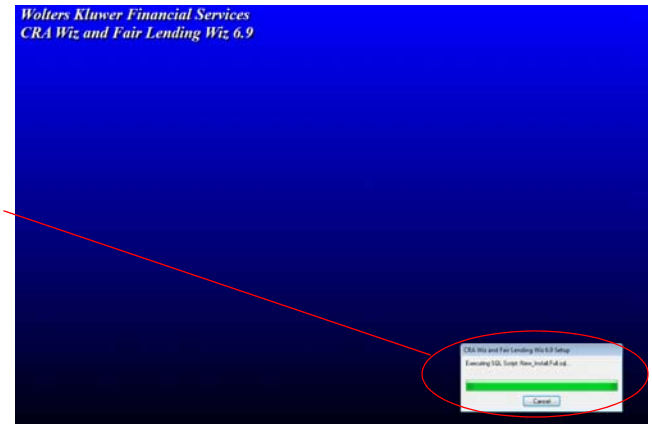
   The software displays the **Ready to Install the Program** screen.

Ready to Install the Program Screen

To install CRA *Wiz* and Fair Lending *Wiz* Workstation, click the **Install** button.



The software installs the software.



Note:
During installation the software displays a progress bar at the lower right-hand corner of the screen.

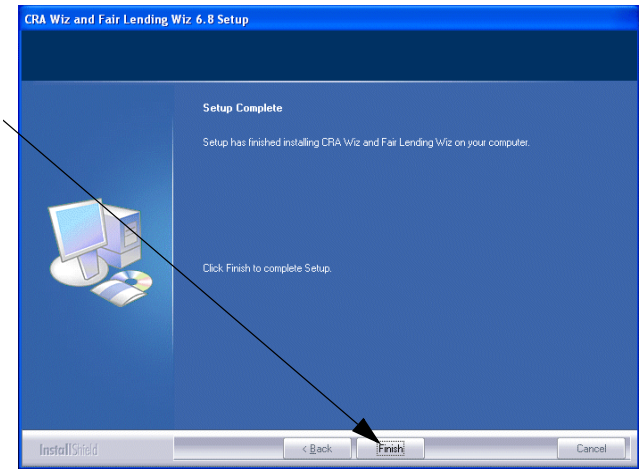
Note:
Depending on the speed and configuration of the target computer, installation can take up to an hour or more.

When installation is complete, the software displays the **Setup Complete** screen.

Setup Complete Screen

To complete installation, follow do the following:

Click the **Finish** button.



Installation of CRA *Wiz* and Fair Lending *Wiz* Workstation is complete.

Important!
Wolters Kluwer Financial Services recommends restarting your computer after installation is complete.

Important!
If you want to install CRA and *Wiz* and Fair Lending *Wiz* **data sets** (Address Data, Mapping Data, Peer Mortgage Data, etc) for which your are licensed, refer to the appropriate instructions for the data set.

Installing CRA *Wiz* and Fair Lending *Wiz* Server

The following section provides procedures for installing CRA *Wiz* and Fair Lending *Wiz* 6.9 Server.

Installation of *Wiz* Server requires that you have access to the license file provided by Wolters Kluwer Financial Services. If you do not have a license file, please contact your Wolters Kluwer Finanical Services Account Executive.

Important!
If you want to install CRA and *Wiz* and Fair Lending *Wiz* **data sets** (Address Data, Mapping Data, Peer Mortgage Data, etc) for which your are licensed, refer to the appropriate instructions for the data set.

Note:
The Windows user that runs the SQL Service needs to have access to the **Database** folders. There are two ways to accomplish this:

1) If there are already folders for the CRA *Wiz* database files named **Data** and **Logs** give the Windows user security read and write access to those folders.

2) If there are not already folders created, please create a **Wolters Kluwer** folder in the **C:\Program Files** folder and give the Windows user security read and write to the folder.

To install *Wiz* Server, follow these steps:

Insert the **CRA *Wiz* and Fair Lending *Wiz* 6.9 Installation DVD** into the target computer's DVD drive.

✓ If the computer is configured to run auto execution files, the installer displays the **Welcome** screen.

✓ If the computer is not configured to run auto execution files (the installation program does not run automatically) do the following:

1. Select **Start** > **Run**.
2. Type **d:\setup.exe** in the **Run** dialog box.

   Note:
   If necessary, substitute the letter designating your DVD drive.

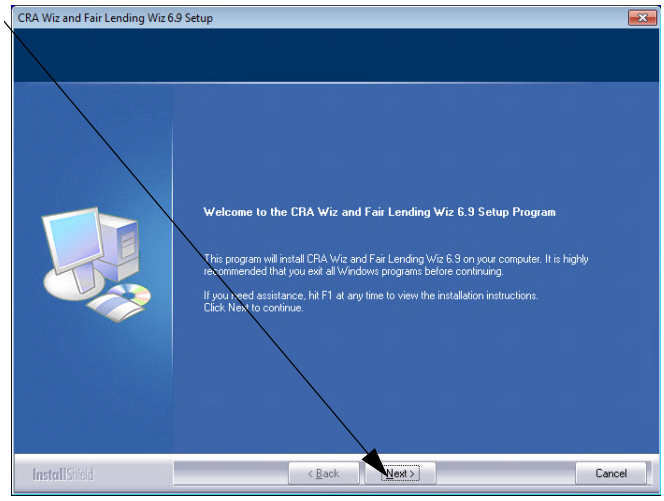
3. Click the **OK** button.

The installer displays the **Welcome** screen.

Welcome Screen

Click the **Next** button.

The software displays the **Setup Type** screen.



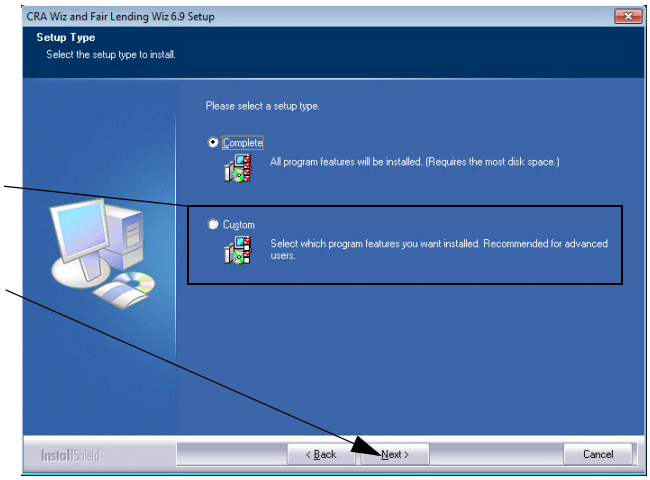
Setup Type Screen

You use the **Setup Type** screen to select which *Wiz* Server components you want to install.

Select the **Custom** option.

Click the **Next** button.

The software displays the **Select Features** screen.

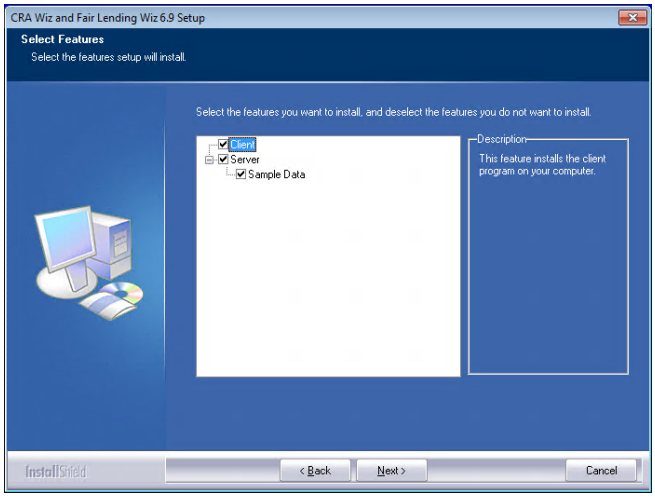


Select Features Screen

You use the **Select Features** screen to select the Server components for installation.

Note:
This screen displays only for custom installations.

To select Server installation components, follow these steps:

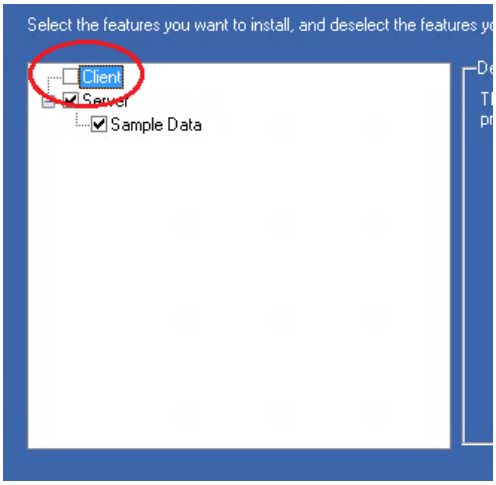


1. De-select the **Client** option.

   Note:
   If you do not select at least one component, the software will display an error message.

2. Click the **Next** button.

   The software displays the **Choose Destination Location** screen.

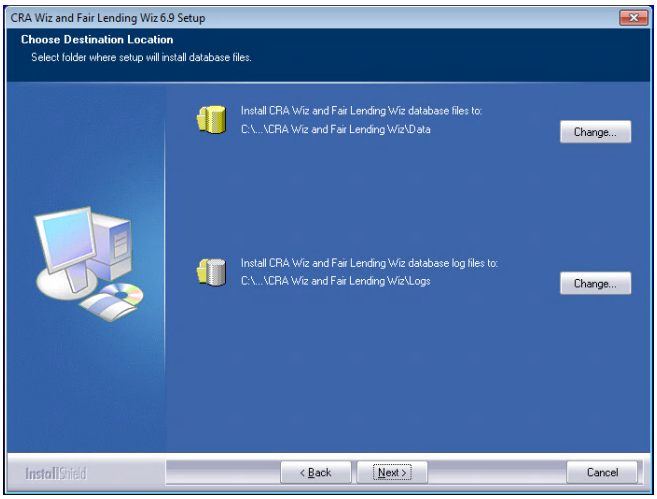


Choose Destination Location Screen

You use the **Choose Destination Folder** screen to select installation paths for data and log files.

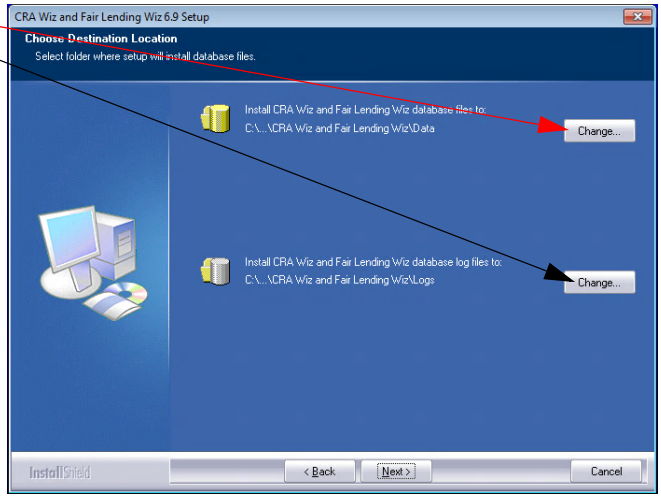
Note:
This screen displays only for custom installations.

To select the destination folder where you want to install *Wiz* Server and/or log files, follow these steps:

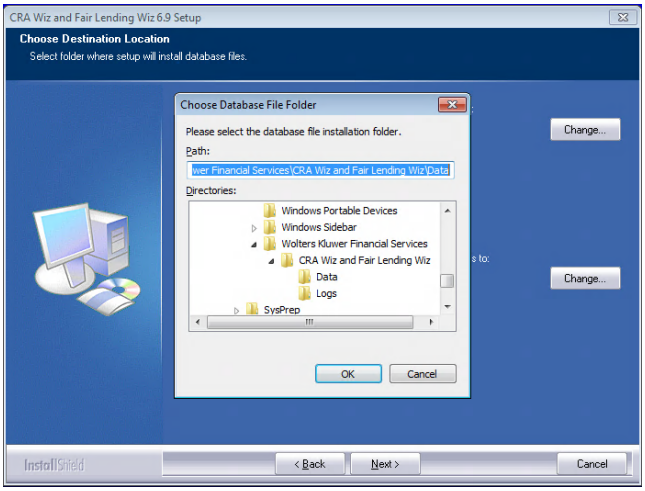


1. Click the **Change...** button for **Database Path** or **Log File Path**.

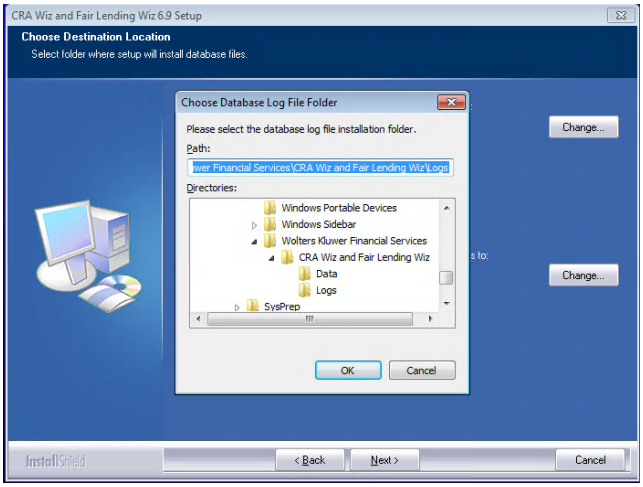
   Depending on which path you select, the software displays one of the following:



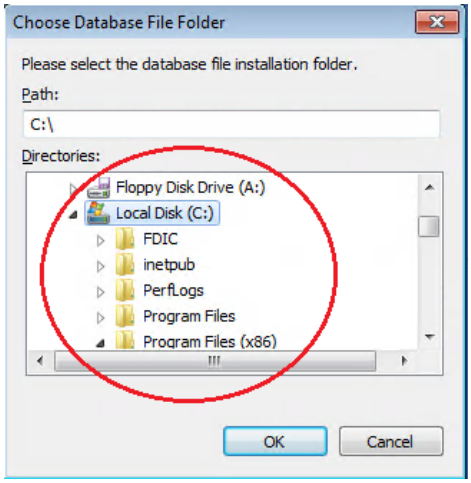
   ✓ **Choose Database File Folder** dialog box.



✓ **Choose Database Log File Folder** dialog box.



2. In the appropriate dialog box, use the **Directories** list box to select an alternate installation location, or type a path name in the **Path** field.



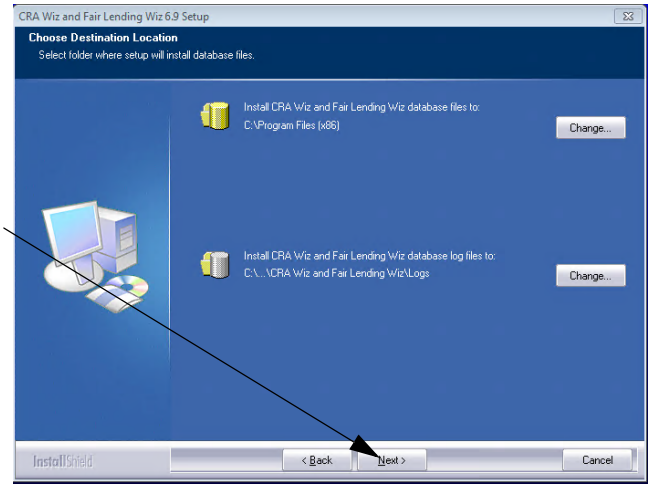
3. Click the **OK** button.

Note:
If you type a path name and the destination folder you specified does not exist, the installer displays a dialog box asking if you want to create the folder.

The installer makes the **Choose Destination Location** screen the active screen.

4. Click the **Next** button.

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



Database Server Login Screen

You use the **Database Server Login** screen to specify how you log into your SQL Server database (via Windows Authentication or SQL Server Authentication), and provide your SQL Server system administrator user name and password, if necessary.

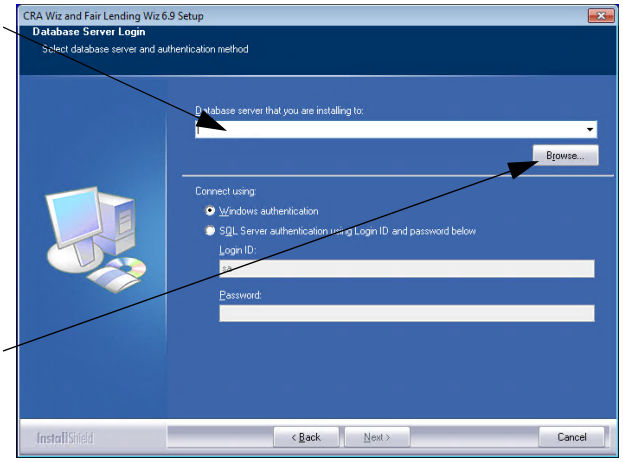
Note:
If you need information about SQL Server on the target computer, contact your institution's computer support staff.

To configure your SQL login information, follow these steps:

1. Do one of the following:

   ✓ In the **SQL Server** text field, enter the name of your SQL Server database.

   ✓ Click the **Browse** button and uses the resultant dialog box to manually locate and select your SQL Server database.



2. Do one of the following under the **Connect using** section:

   ✓ Select the **Windows Authentication** option button if you log into SQL using this method. Windows Authentication indicates that you log into SQL using your Windows user account name and password.

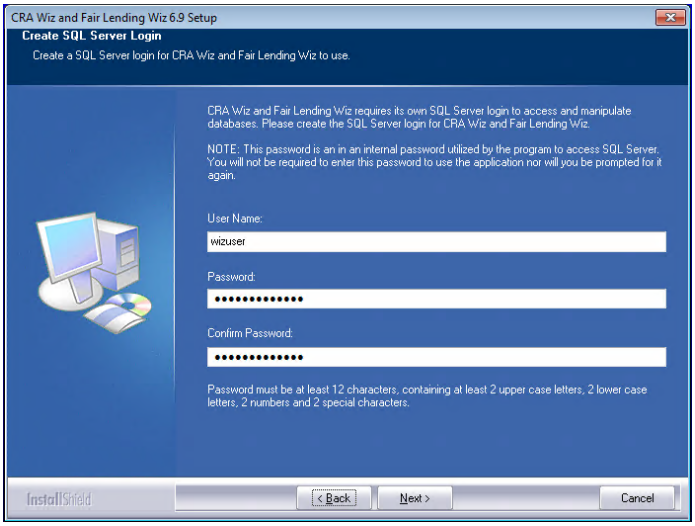
- ✓ Select Use **SQL Server Authentication** option button if you log into SQL using a SQL Administrative account user name and password. Then enter your SQL admin user name and password.

3. Click the **Next** button.

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

Create SQL Server Login Screen

You use the **Create SQL Server Login** screen to create a SQL Server account user name and password.



To create your SQL Server login information, follow these steps:

Note:
This screen displays only for first-time Server installations.

1. Enter the appropriate SQL Server account information in the following text fields:

   - ✓ **User Name** - Enter a SQL Server account user name.
   - ✓ **Password** - Enter a SQL Server account password.
   - ✓ **Confirm Password** - Confirm the spelling of the password by re-typing it into this field.

Note:
Your password must have the following requirements:

- ✓ At least 12 characters long
- ✓ Contain at least two (2) **upper-case letters**
- ✓ Contain at least two (2) **lower-case letters**
- ✓ Contain at least two (2) **numbers**
- ✓ Contain at least two (2) **special characters** (such as #, %, @, etc).

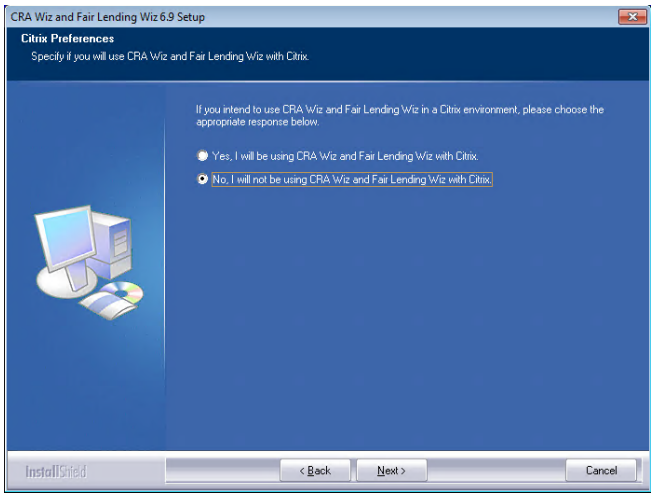
If your password does not mean any of these criteria, the installer displays an error message.

2. Click the **Next** button.

   The software displays the **Citrix Preferences** screen.

Citrix Preferences Screen

You use the **Citrix Preferences** screen to specify whether or not you will be running *Wiz* Server in a Citrix based computer network.



To select Citrix preferendes, follow these steps:

1. Do one of the following:

   ✓ If you will be running *Wiz* in a Citrix environment, select the **Yes, I will be using CRA and Fair Lending Wiz with Citrix** option button.

   ✓ If you will **not** be running *Wiz* in a Citrix environment, confirm that the **No, I will not be using CRA and Fair Lending Wiz with Citrix** option button is selected (this option is selected by default).

   Note:
   If you are not sure which type of computer network your institution uses, contact your network administrator.

2. Click the **Next** button.

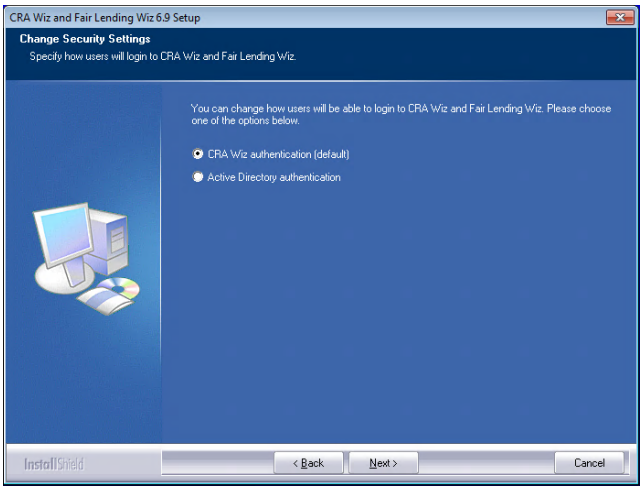
   The software displays the **Change Security Settings** screen.

Change Security Settings Screen

You use the **Change Security Settings** screen to specify how users will log into the program.

To select security settings, follow these steps:

1. Select one of the following:



   ✓ **CRA Wiz authentication (default)** - Select if you will log into the program using a *Wiz* user account and password. This is the default option.

   ✓ **Active Directory authentication** - Select if you will log into the program automatically using a Windows user account and password.

   Note:
   Please contact your institution's Network Administrator for more information about Active Directory Mode before selecting this option.

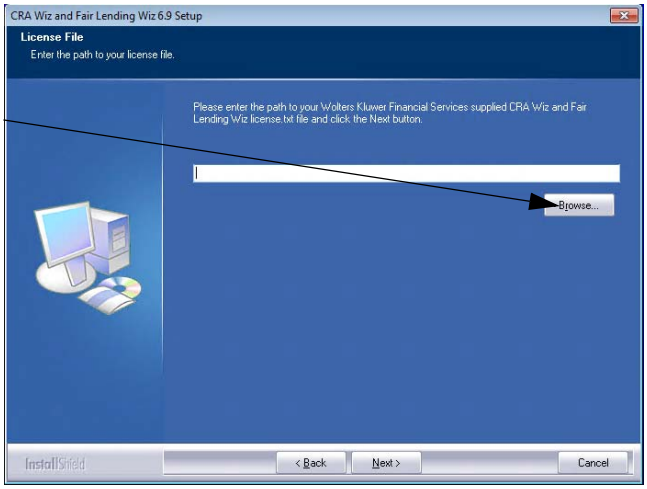
2. Click the **Next** button.

   The software displays the **License File** screen.

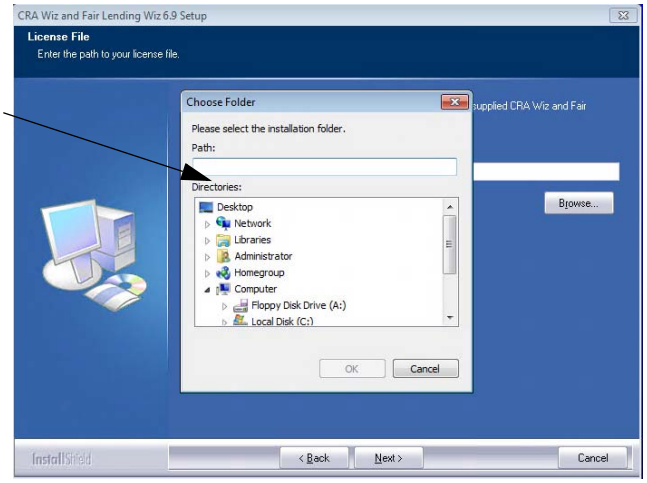
License File Screen

To license the software, follow these steps:

1. Click the **Browse** button.



2. Use the resultant dialog box to navigate to and select the license file provided by Wolters Kluwer Financial Services.



Note:
If you do not have a license file, please contact your Wolters Kluwer Financial Services Account Executive.

3. Click the **Next** button.

   The software displays the **Enter Authorization Number** screen.

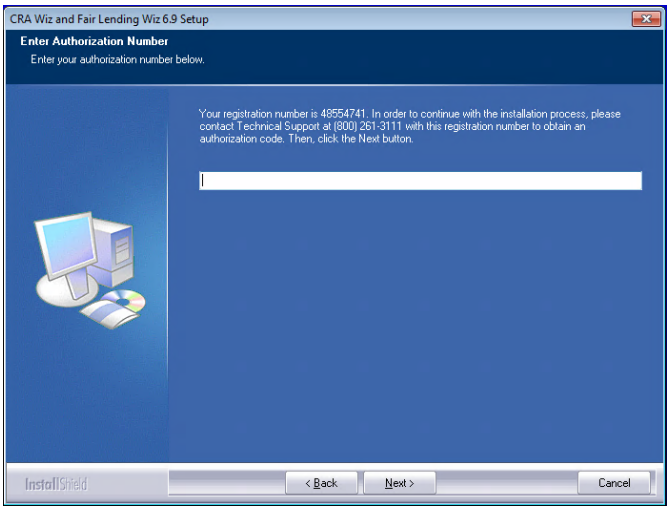
Enter Authorization Number Screen

You use the **Enter Authorization Number** screen to authorize the software.

To authorize CRA *Wiz* and Fair Lending *Wiz*, follow these steps:

1. Call Wolters Kluwer Finanical Services **Technical Support** to obtain an authorization number (have your registration number available; this number displays on the screen).

   The phone number is **(800) 261-3111**. When prompted, select option **1**.

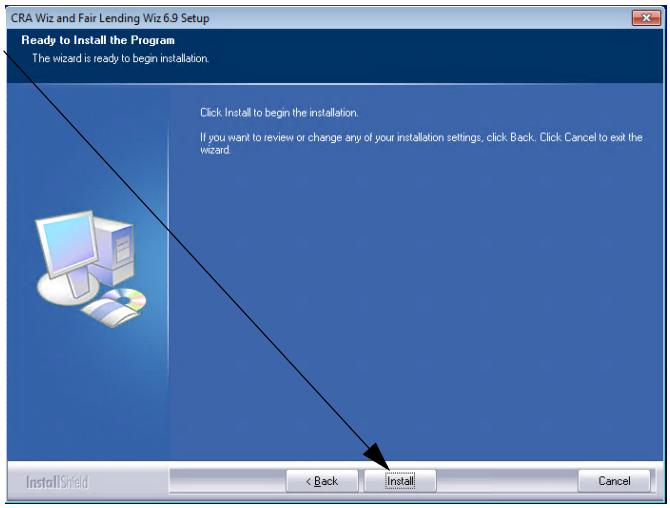


2. After you enter the authorization number, click the **Next** button.

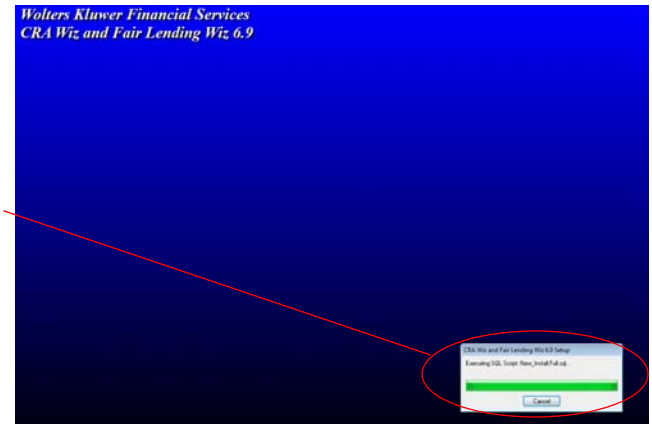
   The software displays the **Ready to Install the Program** screen.

Ready to Install the Program Screen

To install *Wiz* Server, click the **Install** button.



The software installs *Wiz* Server.



Note:
During installation the software displays a progress bar at the lower right-hand corner of the screen.

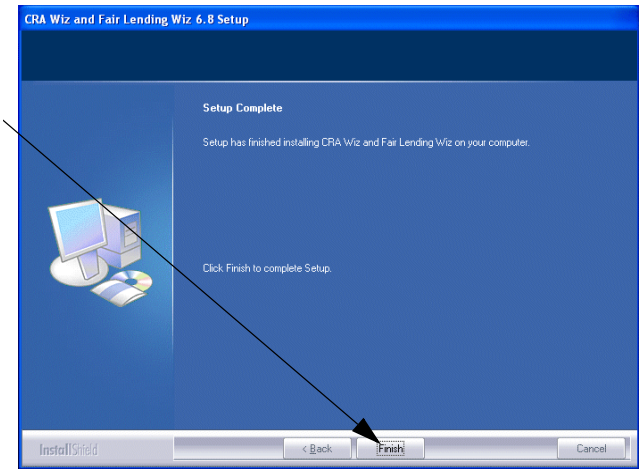
Note:
Depending on the speed and configuration of the target computer, installation can take up to an hour or more.

When installation is complete, the software displays the **Setup Complete** screen.

Setup Complete Screen

To complete installation, follow do the following:

Click the **Finish** button.



Installation of *Wiz* Server is complete.

Important!
Wolters Kluwer Financial Services recommends restarting your computer after installation is complete.

Important!
If you want to install CRA and *Wiz* and Fair Lending *Wiz* **data sets** (Address Data, Mapping Data, Peer Mortgage Data, etc) for which your are licensed, refer to the appropriate instructions for the data set.

Installing CRA *Wiz* and Fair Lending *Wiz* Client

Follow these instructions if you want to install the CRA *Wiz* and Fair Lending *Wiz* **Client** software on a target computer. With *Wiz* Client installed, the target computer can connect to and work with databases located on a networked computer running *Wiz* Server.

Note:
You should install the Client software only after you have installed and configured *Wiz* Server on a networked computer. For *Wiz* Server installation procedures, refer to **Installing CRA Wiz and Fair Lending Wiz Workstation** on page 11.

To install the *Wiz* Client software, follow these procedures:

Insert the **CRA *Wiz* and Fair Lending *Wiz* 6.9 Installation DVD** into the target computer's DVD drive.

✓ If the computer is configured to run auto execution files, the installer displays the **Welcome** screen.

✓ If the computer is not configured to run auto execution files (the installation program does not run automatically) do the following:

1. Select **Start**/**Run**.
2. Type **d:\setup.exe** in the **Run** dialog box.

   Note:
   If necessary, substitute the letter designating your DVD drive.

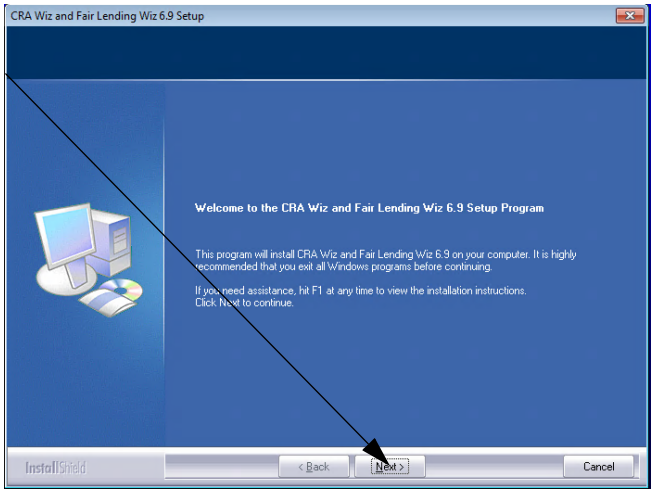
3. Click the **OK** button.

   The installer displays the **Welcome** screen.

Welcome Screen

Click the **Next** button.

The software displays the **Setup Type** screen.



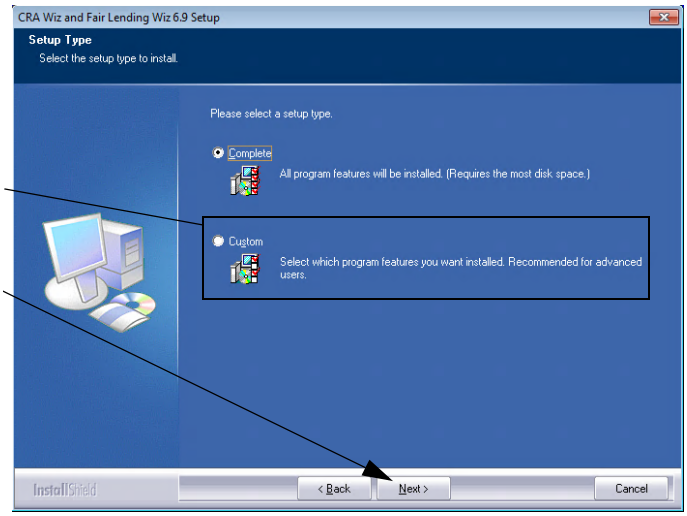
Setup Type Screen

You use the **Setup Type** screen to select which *Wiz* Client components you want to install.

Select the **Custom** option.

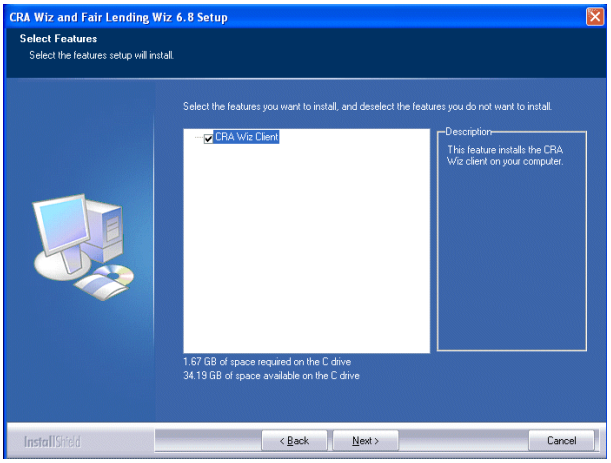
Click the **Next** button.

The software displays the **Select Features** screen.



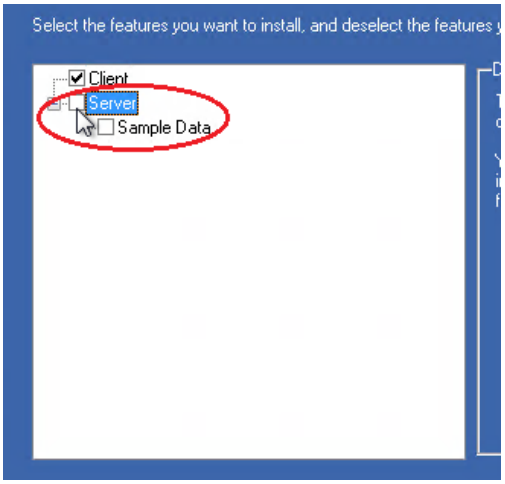
Select Features Screen

You use the **Select Features** screen to select Client components to install.



Note:
The installer displays this screen only if you selected the **Custom** option in the Setup Type screen.

To select components, follow these steps:



1. De-select the **Server** option.

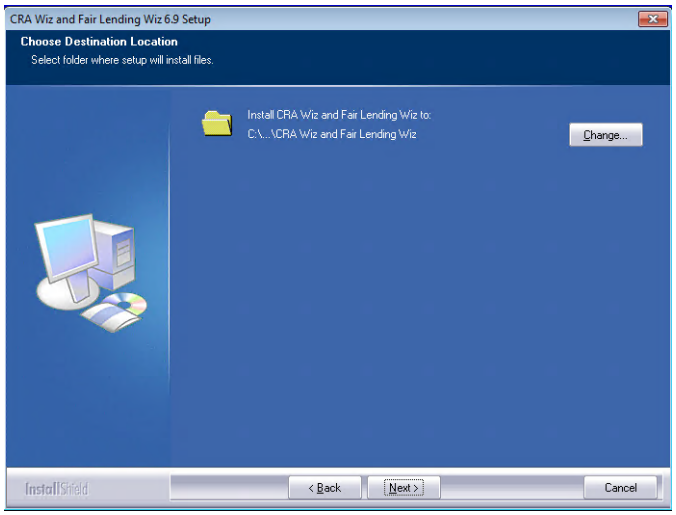
   Note:
   If you do not select at least one component, the software will display an error message.

2. Click the **Next** button.

   The software displays the **Choose Destination Location** screen.

Choose Destination Location Screen

You use the **Choose Destination Location** screen to select where you want to install *Wiz* Client on the target computer.



To choose an installation location, do the following:

✓ If you want to accept the default location, click the **Next** button. This will install the Client software to your default drive using the following directory path: **\Program Files\Wolters Kluwer\CRA Wiz and Fair Lending Wiz**.

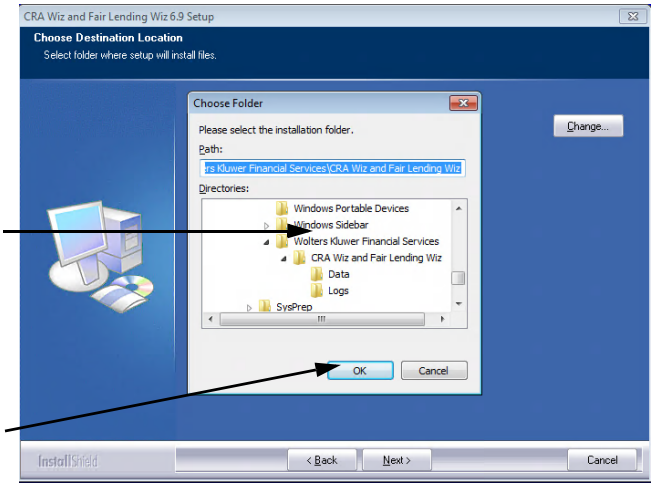
✓ To install *Wiz* Client on a drive other than the c:\ (default) drive, follow these steps:

1. Click the **Change...** button.

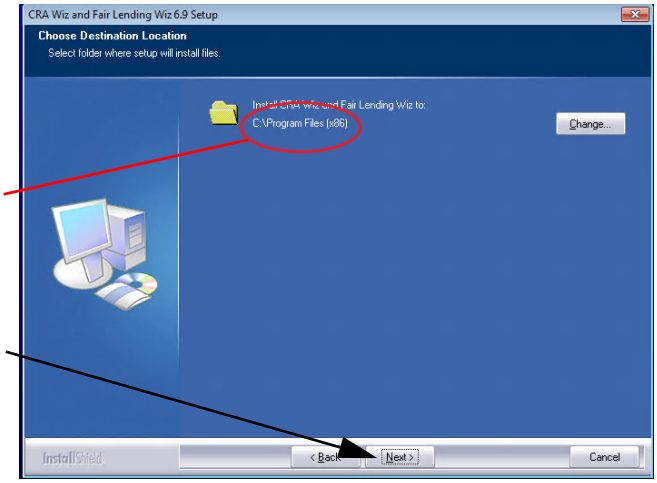
   The software displays the **Choose Folder** dialog box.

2. Use the **Directories** tree view to select an alternate installation location.

3. Click the **OK** button.



The software displays the directory (folder) path in the **Install CRA Wiz and Fair Lending Wiz to:** display.

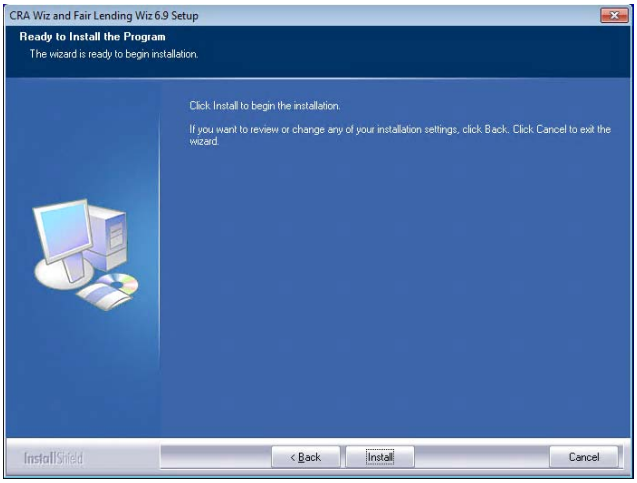


4. Click the **Next** button.

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

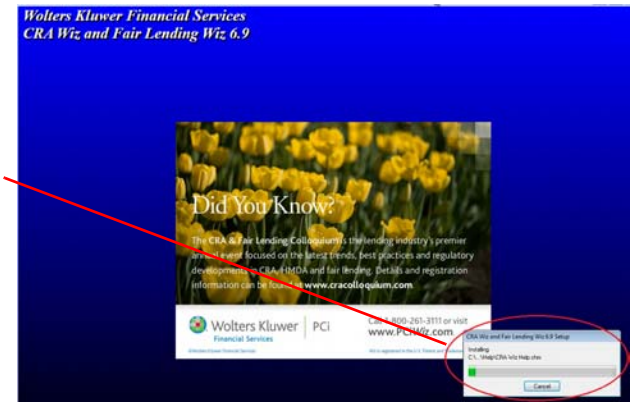
Ready to Install the Program Screen

To install *Wiz* Client, click the **Install** button.



The software installs *Wiz* Client.

Note:
During installation the software displays a progress bar at the lower right-hand corner of the screen.

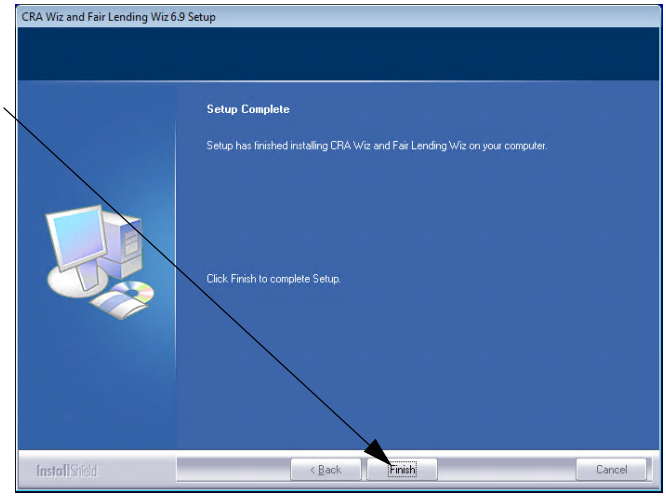


When installation is complete, the software displays the **Setup Complete** screen

Setup Complete Screen

To complete installation, do one of the following:

Click the **Finish** button.



Installation of CRA *Wiz* and Fair Lending *Wiz* Client is complete.

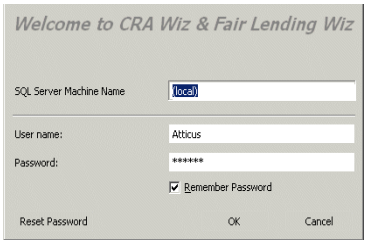
Important!
Wolters Kluwer Financial Services recommends restarting your computer after installation is complete.

Wiz Login Screen

The first time you run CRA *Wiz* and Fair Lending *Wiz* Client you must enter your login information.

To enter your login information, follow these steps:

1. In the **User Name** field, do one of the following:

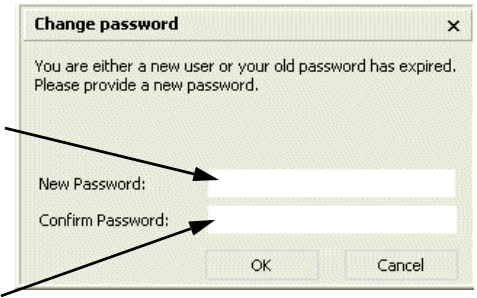


   - ✓ Accept **Admin**, the default value, and enter the password **crawiz.**
   - ✓ If when configuring the installation you entered a user name other than Admin, the software will display this name. Accept the user name and leave the password field blank.

2. Select **Remember Password** if you want the software to retain your password for future log ins.

3. Click the **OK** button.

   The software displays the **Enter New Password** dialog box.



4. Enter a new password (to replace the default password) in the **New Password** field.

5. To confirm your new password, enter the password again in the **Confirm Password** field.

6. Click the **OK** button.

The software launches and displays the CRA *Wiz* and Fair Lending *Wiz* **Main** screen.