



Consumer Compliance Solutions

CRA *Wiz* and Fair Lending *Wiz* 7.1

Installation Instructions - NEW Installation

Last Updated February 26, 2016

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Overview

The following installation instructions provide procedures for a new installation of CRA Wiz and Fair Lending Wiz 7.1.

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

- [Installing CRA Wiz and Fair Lending Wiz Workstation](#) - 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](#) - 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](#) - 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 package installs version 7.1 of the program. **It is strongly recommended that you exit all Windows programs and disable anti-virus software before running this installer.**

For the latest CRA Wiz and Fair Lending Wiz technical requirements, please refer to the [System Requirements - CRA Wiz 7.1](#) document.

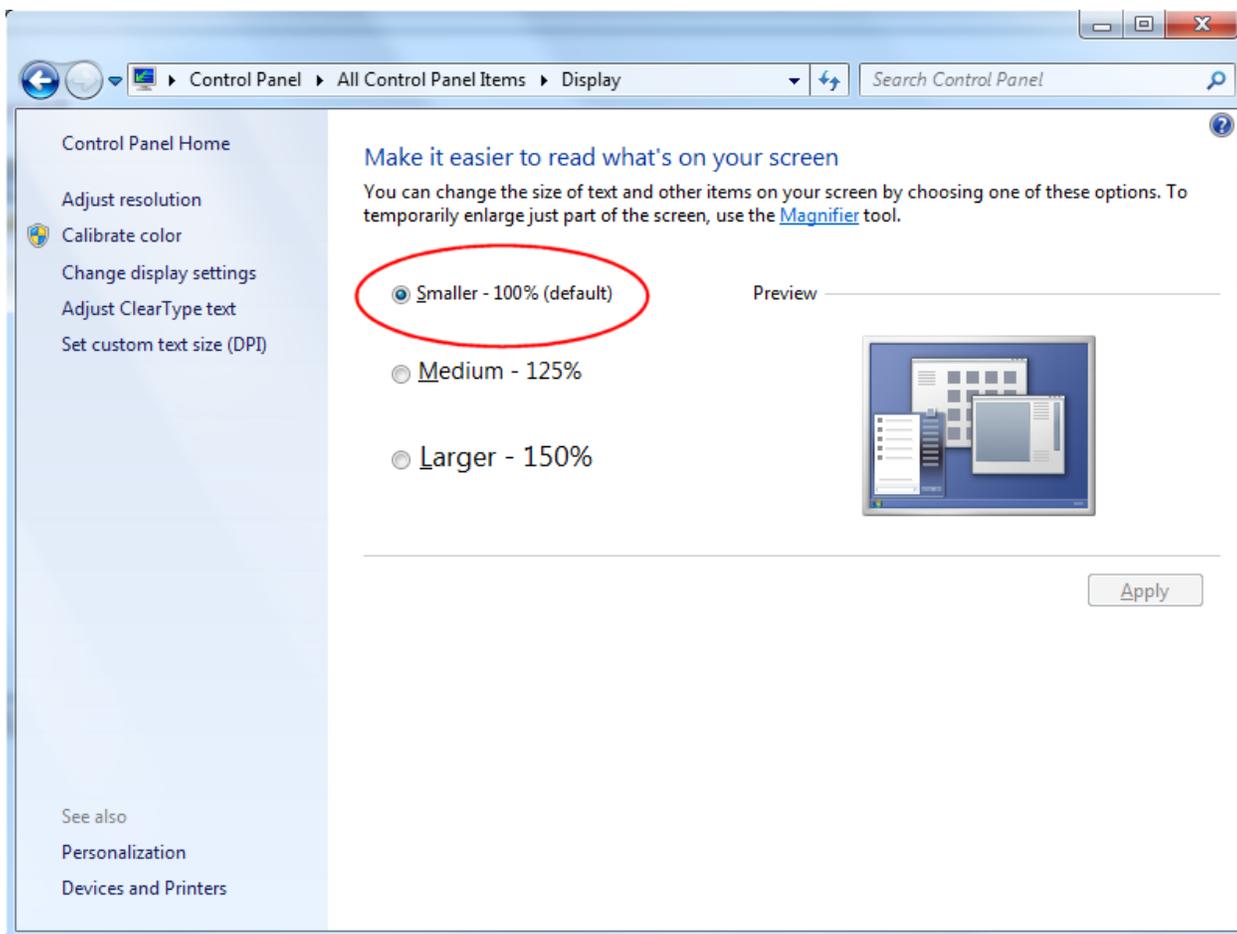
In Geocoding environments with a 64-bit SQL server, the Windows logon for the SQL Service must have administrative privileges.

Display Settings for Mapping in Windows 7

Use of the Mapper requires a specific setting for the Display option when using Windows 7 . 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:



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** and **Client**.

Important!

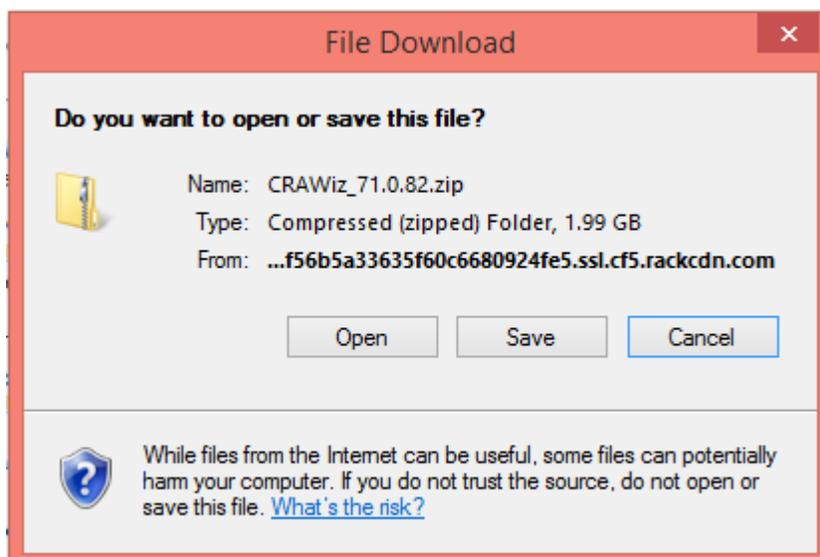
If you want to install CRA and *Wiz* and Fair Lending *Wiz* data sets (Geocoding Data, Mapping Data, Peer Mortgage Data, etc) for which you are licensed, refer to the appropriate instructions for the data set.

Important!

If SQL is not installed on the target computer, please download and install a supported version from the Microsoft website. Support SQL Server versions are covered in the [System Requirements - CRA *Wiz* 7.1](#) document.

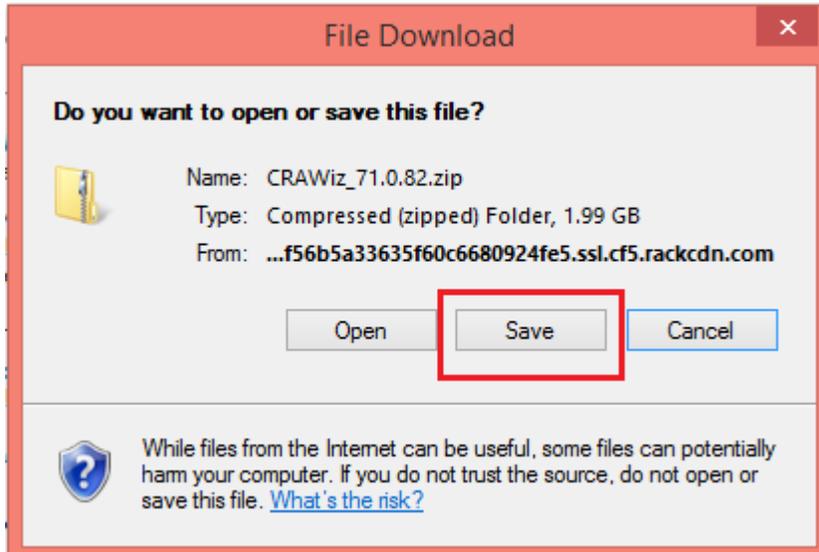
1. In the **Wiz Web Center**, click the **Installation Package** link.

Windows displays a **File Download** dialog box:



Note: The dialog box that Windows displays might differ from the above screenshot depending on your Windows version and computer configuration.

2. Click the **Save** button to download a copy of the installation package to your computer:



3. Extract the installation package.

Note: If you do not know how to extract the contents of a compressed folder, please contact your institution's computer support staff.

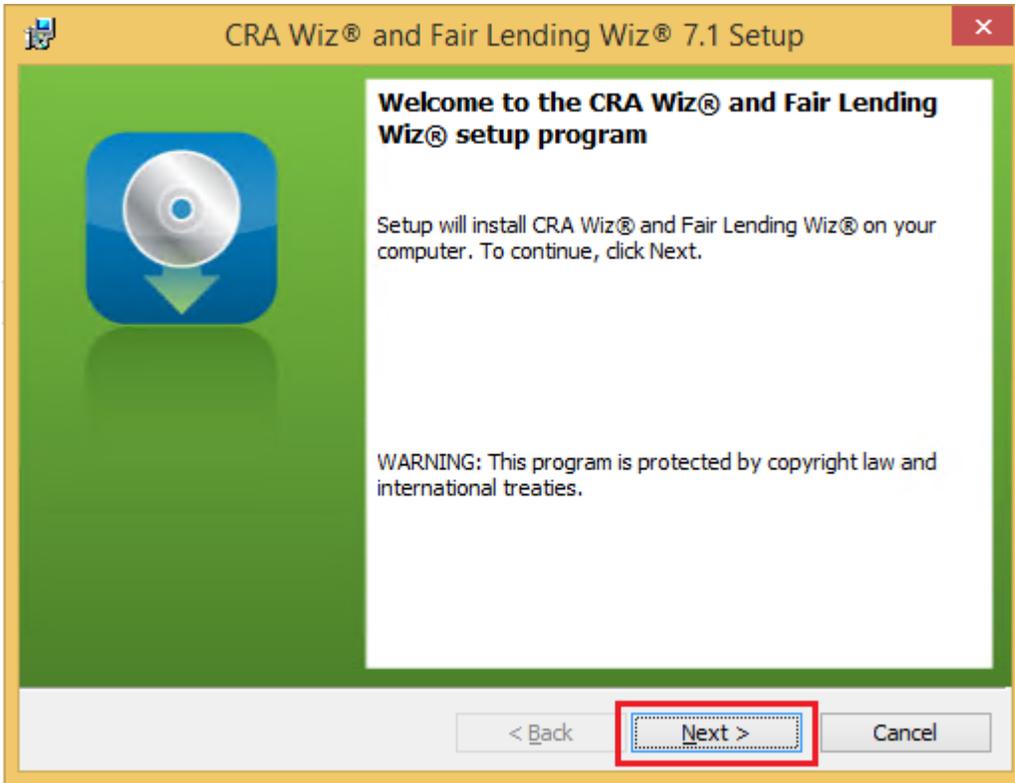
4. Confirm that the extracted installation folder is located on the machine where you want to install **CRA Wiz and Fair Lending Wiz Workstation**.
5. Open the installation folder and locate the **Setup.exe** file.
6. Right-click the **Setup.exe** file.

The software displays a contextual menu.

7. Select **Run as Administrator**.

The installer displays the **Welcome** screen.

Welcome Screen

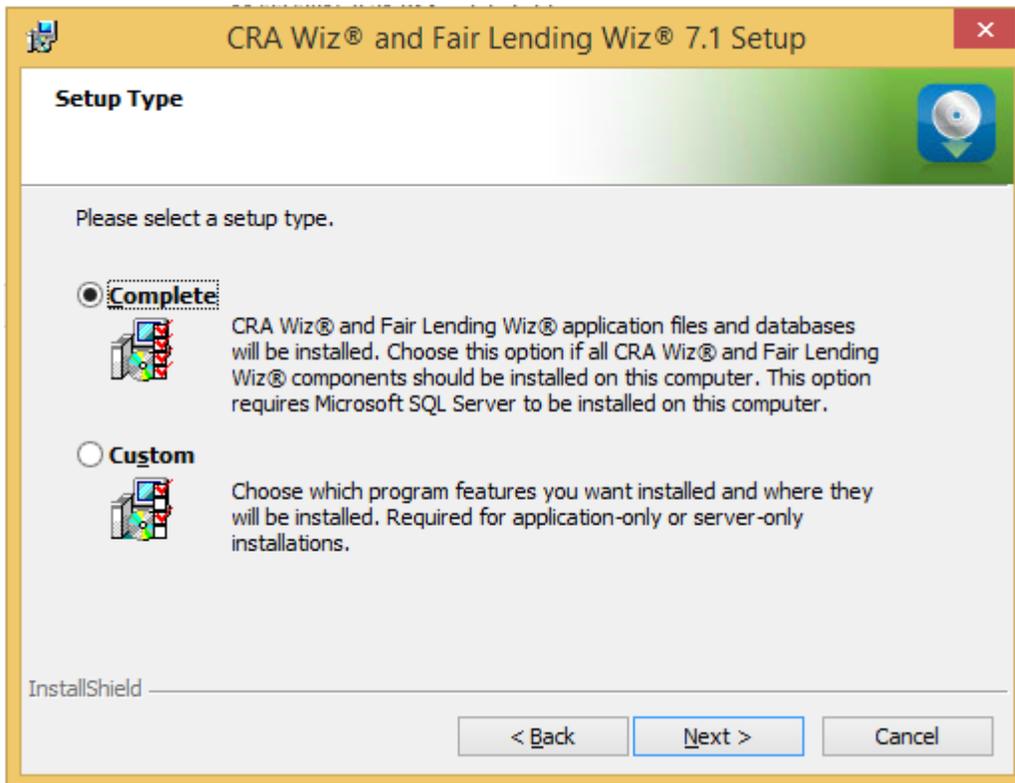


Click the **Next** button.

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 **SQL Server Name** screen.

SQL Server Name Screen

You use the SQL Server Name screen to specify the SQL Server you're installing to, 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:

The screenshot shows a Windows-style dialog box titled "CRA Wiz® and Fair Lending Wiz® 7.1 Setup". The main heading is "SQL Server Name" with a sub-instruction: "Enter the SQL Server name and authentication mode." Below this, there is a text field labeled "SQL server that you are installing to:" which is currently empty. To the right of this field is a "Browse..." button. Underneath, the "Connect using:" section has two radio button options: "Windows authentication credentials of current user" (which is selected) and "Server authentication using the Login ID and password below". The second option is followed by two text boxes labeled "Login ID:" and "Password:". At the bottom of the dialog, there are three buttons: "< Back", "Next >" (which is highlighted with a blue border), and "Cancel". The "InstallShield" logo is visible in the bottom left corner.

Note:

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

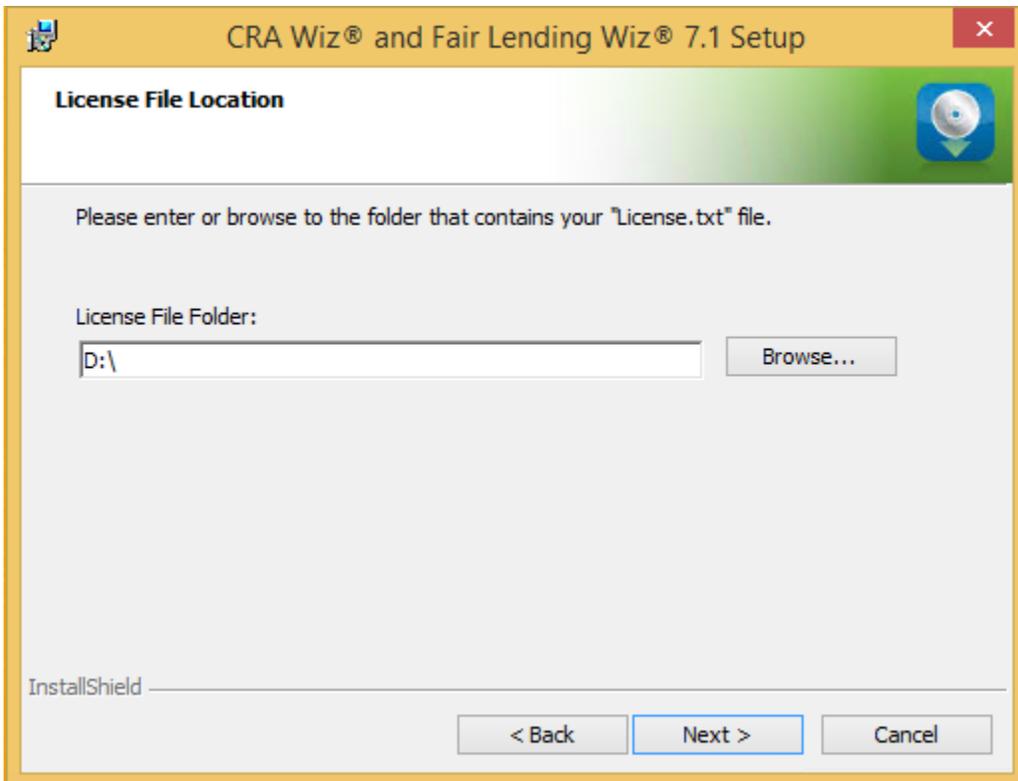
To configure your SQL login information, follow these steps:

1. Do one of the following:
 - In the **SQL Server that you are installing to** 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 credentials of current user** 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 the **Server Authentication using the Login ID and password** 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 **License File Location** screen.

License File Location 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:

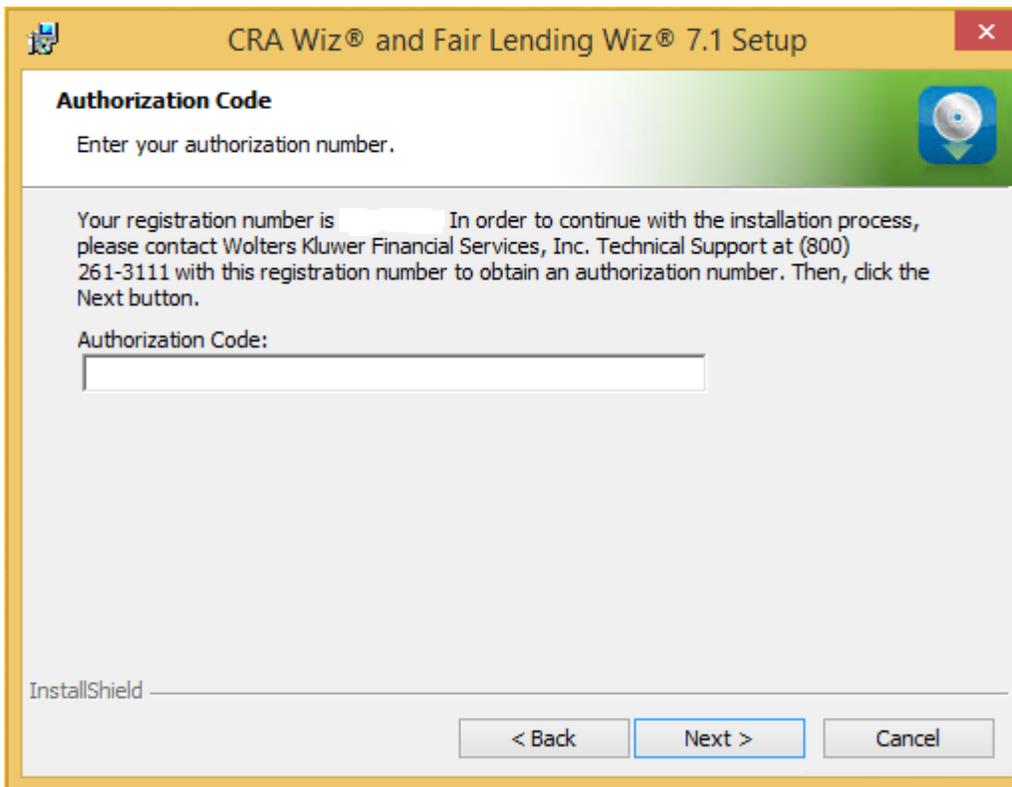
If you do not have a license file, please contact your Wolters Kluwer Financial Services Account Executive.

3. Click the **Next** button.

The software displays the **Authorization Code** screen.

Authorization Code Screen

You use the **Authorization Code** screen to authorize the software:



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

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

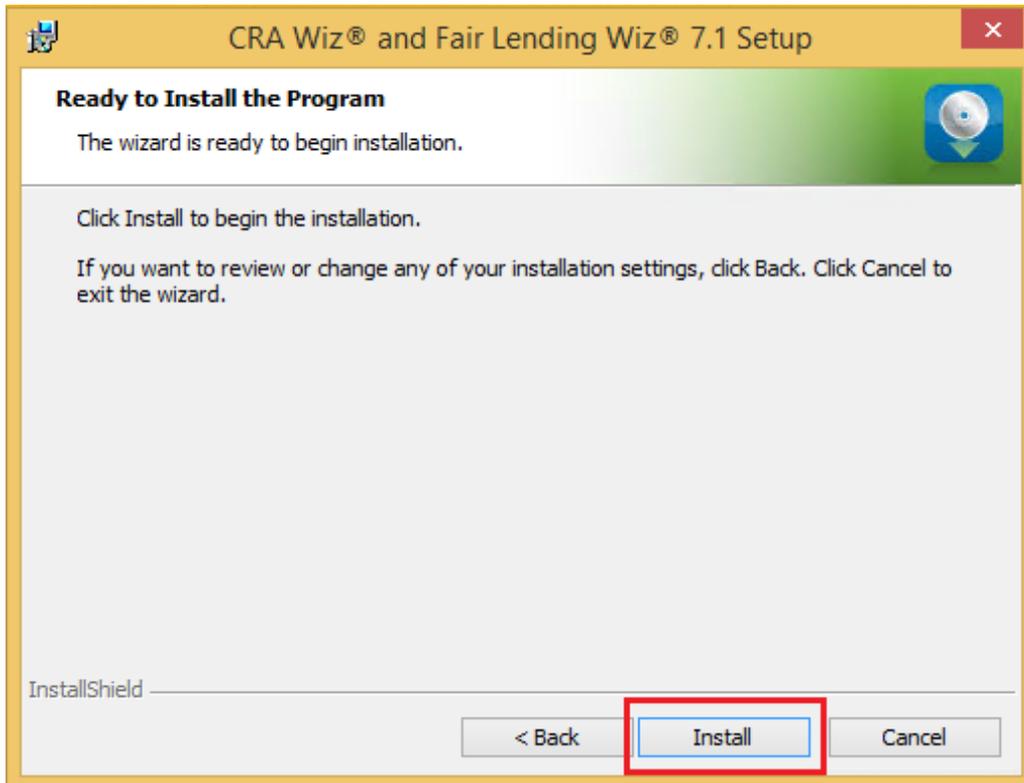
The phone number is **(800) 261-3111**. When prompted, select **option 1**.

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 installer installs the software:



Note:

During installation the software displays a progress bar at the bottom of the installer window.

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, do the following:

Note:

If you want to view the Windows Installer log after quitting the installer, click the **Show the Windows Installer log** checkbox.

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 Wiz* and *Fair Lending Wiz* **data sets** (Geocoding Data, Mapping Data, Peer Mortgage Data, etc.) for which you 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* 7.1 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 Financial Services Account Executive.

Important!

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

Note:

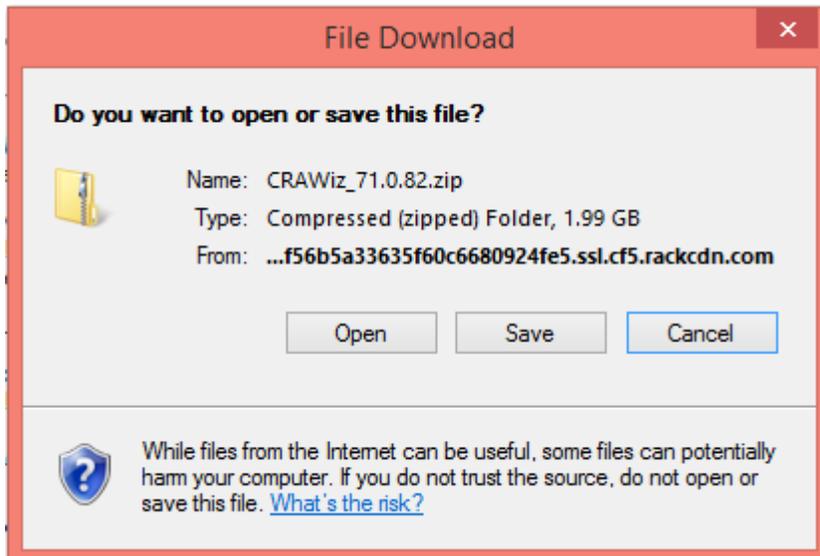
The Windows user that runs the SQL Service needs to have access to the **Database** folders. There are two ways to accomplish this:

- 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.
- 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:

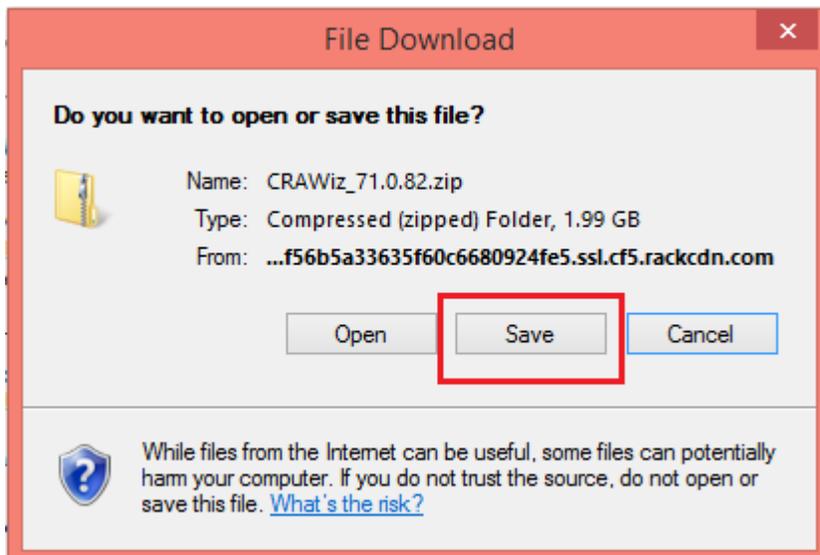
1. In the **Wiz Web Center**, click the **Installation Package** link.

Windows displays a **File Download** dialog box:



Note: The dialog box that Windows displays might differ from the above screenshot depending on your Windows version and computer configuration.

2. Click the **Save** button to download a copy of the installation package to your computer:



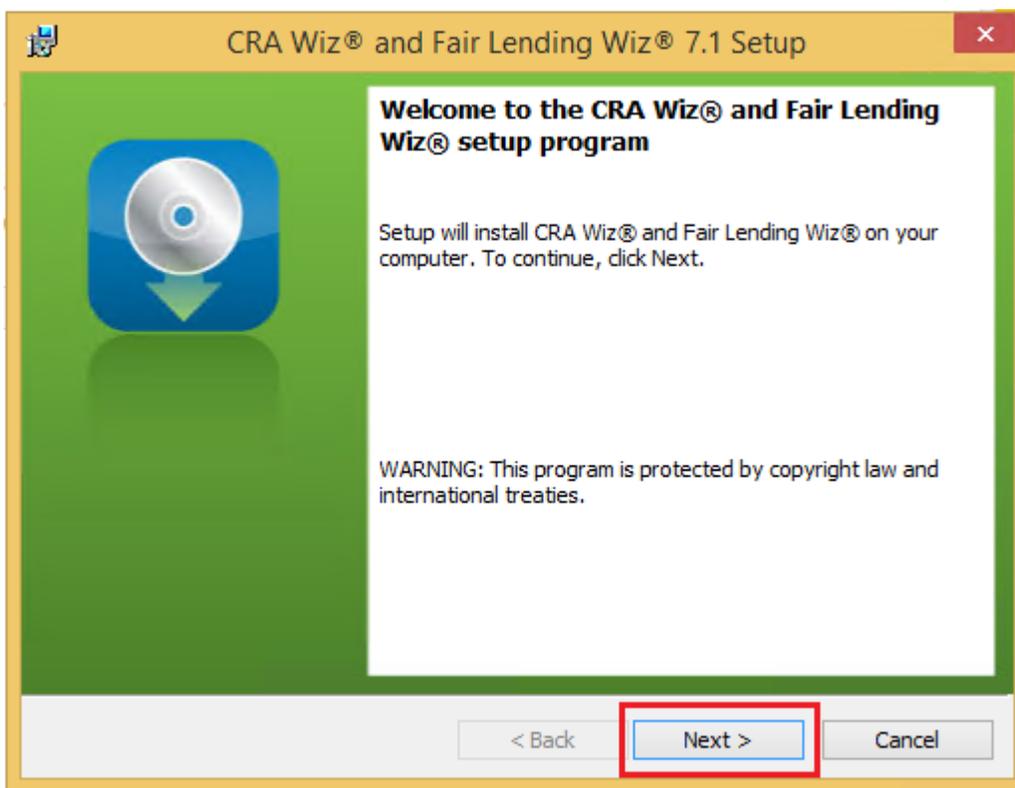
3. Extract the installation package.

Note: If you do not know how to extract the contents of a compressed folder, please contact your institution's computer support staff.

4. Confirm that the extracted installation folder is located on the machine where you want to install **CRA Wiz** and **Fair Lending Wiz Server**.
5. Open the installation folder and locate the **Setup.exe** file.
6. Click the **Setup.exe** file.

The installer displays the **Welcome** screen.

Welcome Screen

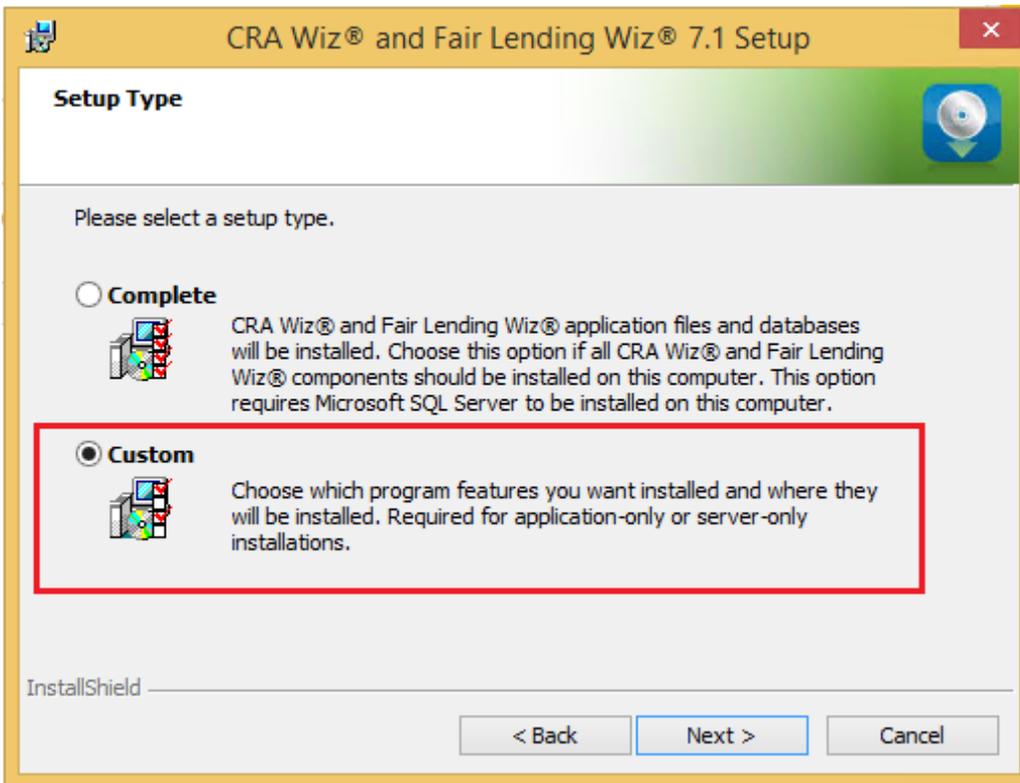


Click the **Next** button.

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:



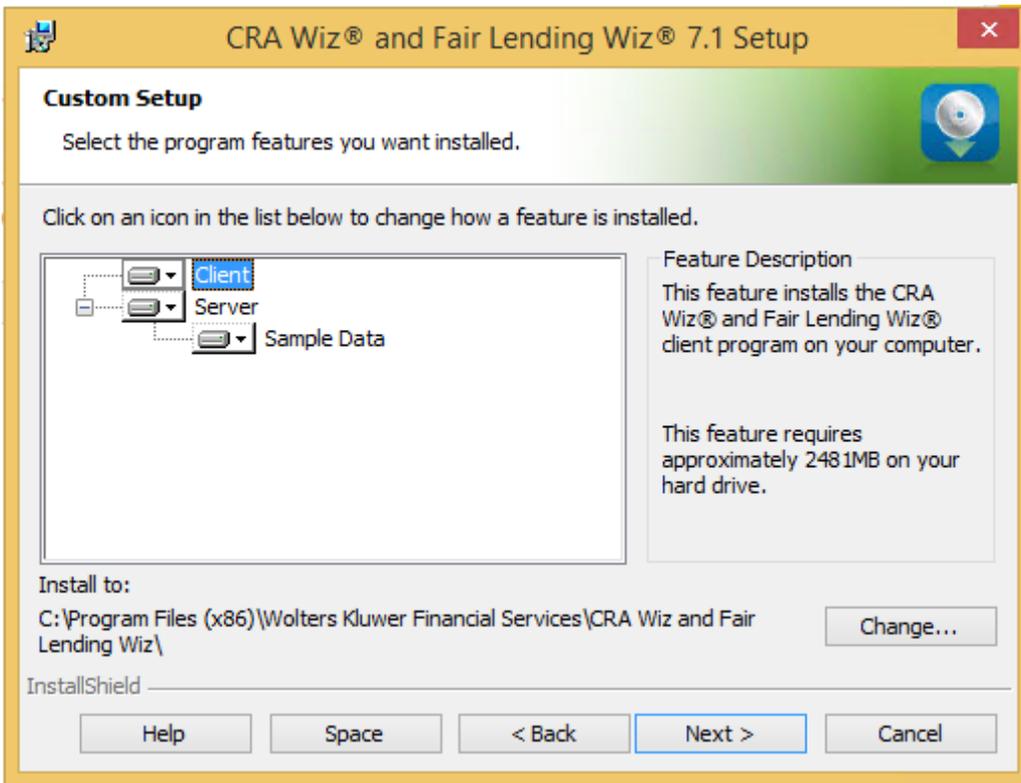
Select the **Custom** option.

Click the **Next** button.

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

Custom Setup Screen

You use the **Custom Setup** screen to select the Wiz Server components for installation:

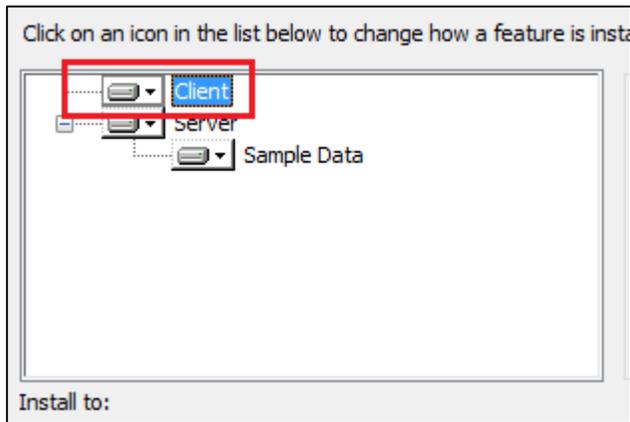


Note:

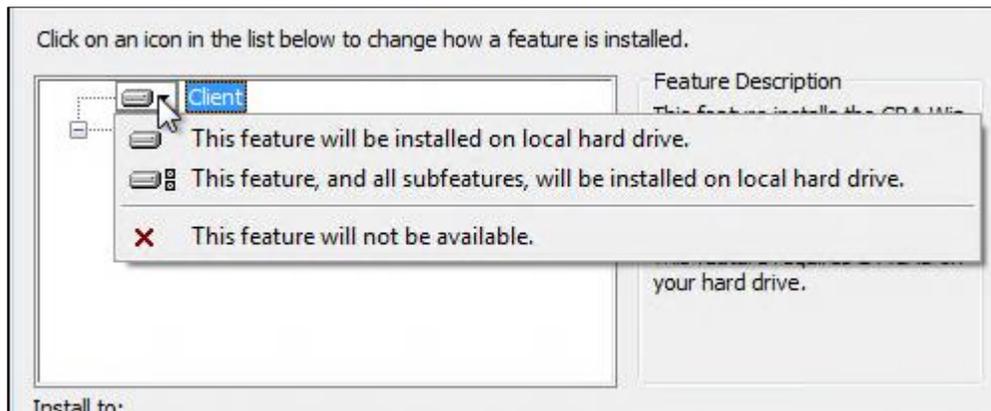
This screen displays only for custom installations.

To select Server installation components, follow these steps:

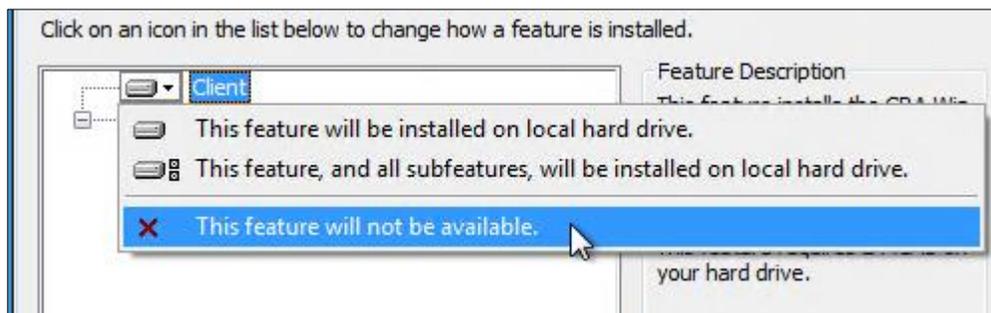
1. In the components list window, select the **Client** drop-down menu:



The software displays a contextual menu:



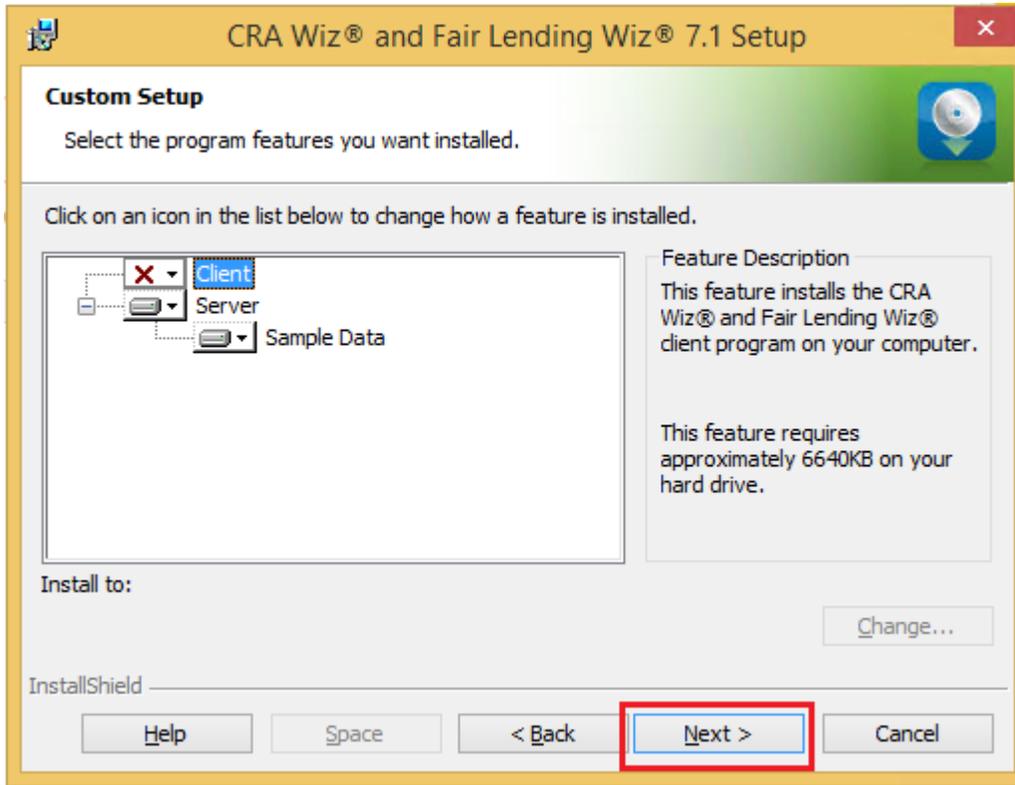
2. Select **This feature will not be available:**



Note:

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

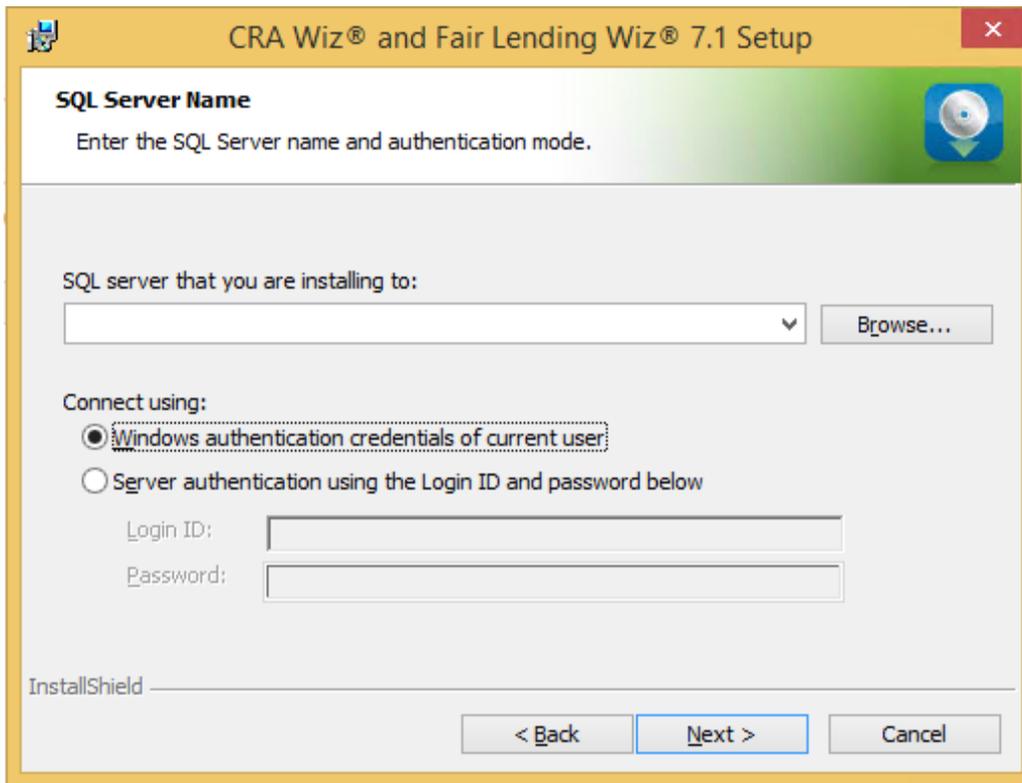
3. Click the **Next** button:



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

SQL Server Name Screen

You use the **SQL Server Name** screen to specify the SQL Server you're installing to, 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 that you are installing to** 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 credentials of current user** 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 the **Server Authentication using the Login ID and password** 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 Sever 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:

Create SQL Server Login

Create a SQL Server login for CRA Wiz® and Fair Lending Wiz®.

CRA Wiz® and Fair Lending Wiz® requires its own SQL Server login to access and manipulate databases. Please enter the name of the SQL Server login you want to create for CRA Wiz® and Fair Lending Wiz®.

User Name:

Password:

Confirm Password:

NOTE: Password must be at least 12 characters, containing at least 2 upper case letters, 2 lower case letters, 2 numbers and 2 special characters.

InstallShield

< Back Next > Cancel

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.).

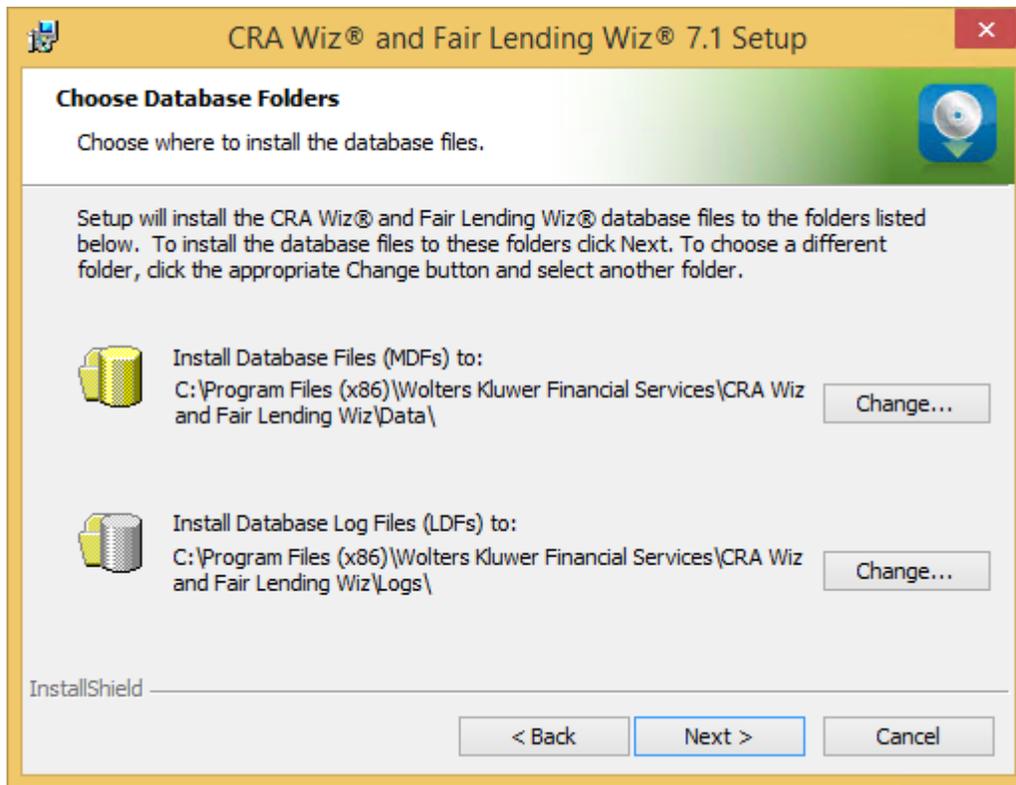
If your password does not mean any of these criteria, the installer displays an error message.

2. Click the **Next** button.

The software displays the **Choose Database Folders** screen.

Choose Database Folders

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

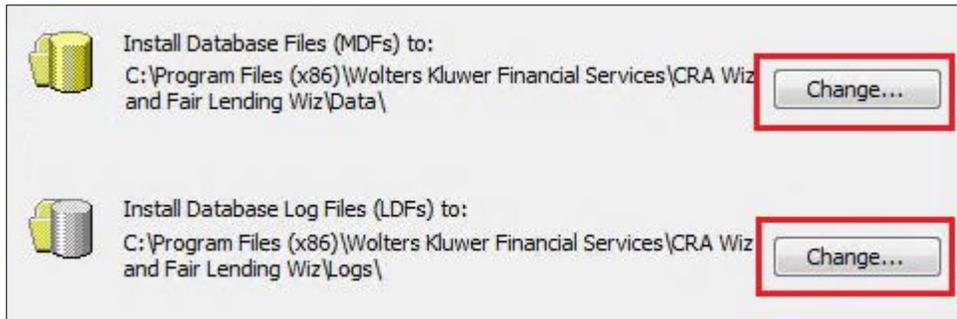


Note:

This screen displays only for custom installations.

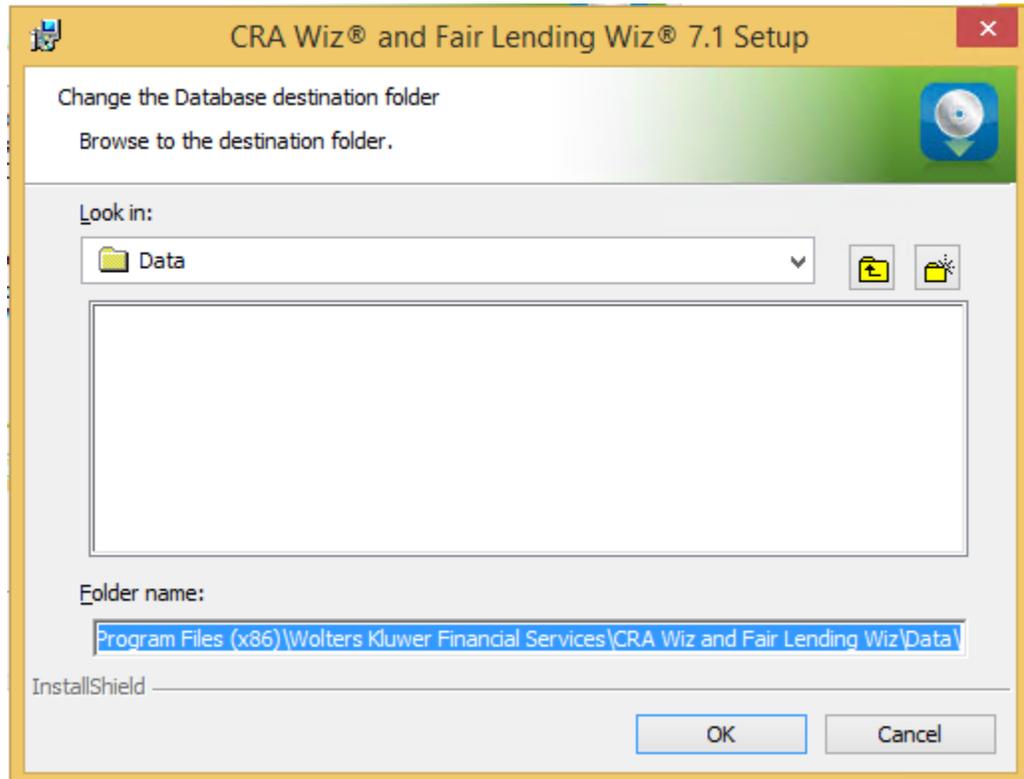
To select the destination folder where you want to install *Wiz Server* and/or log files, follow these steps:

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

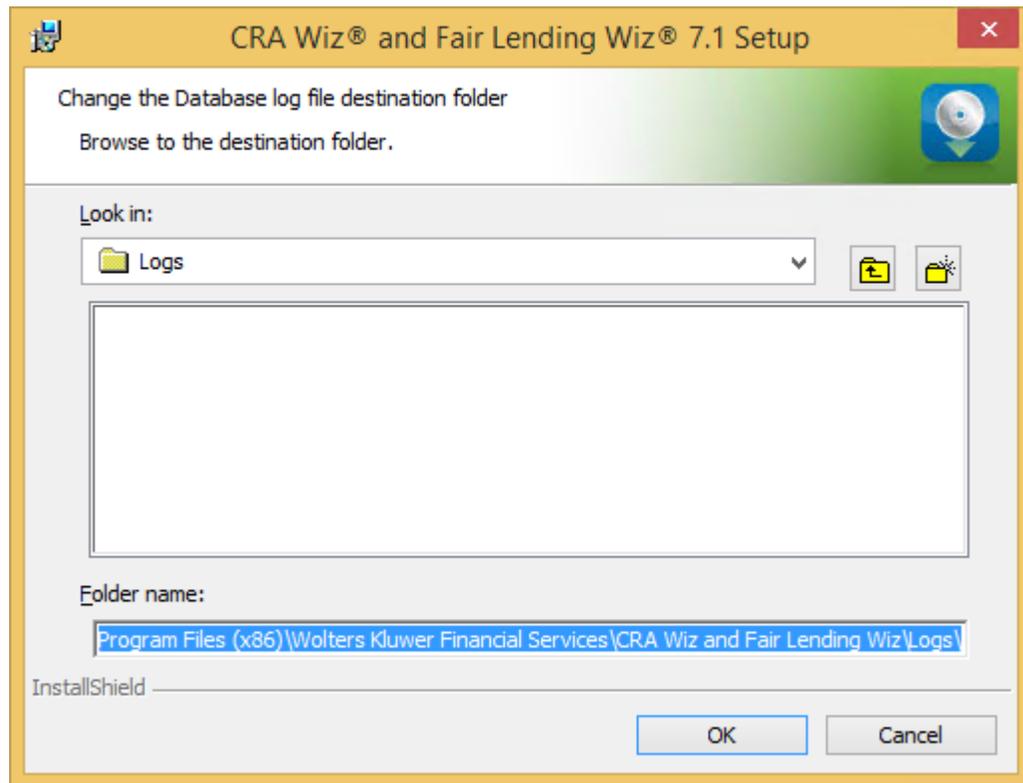


Depending on which path you select, the software displays one of the following:

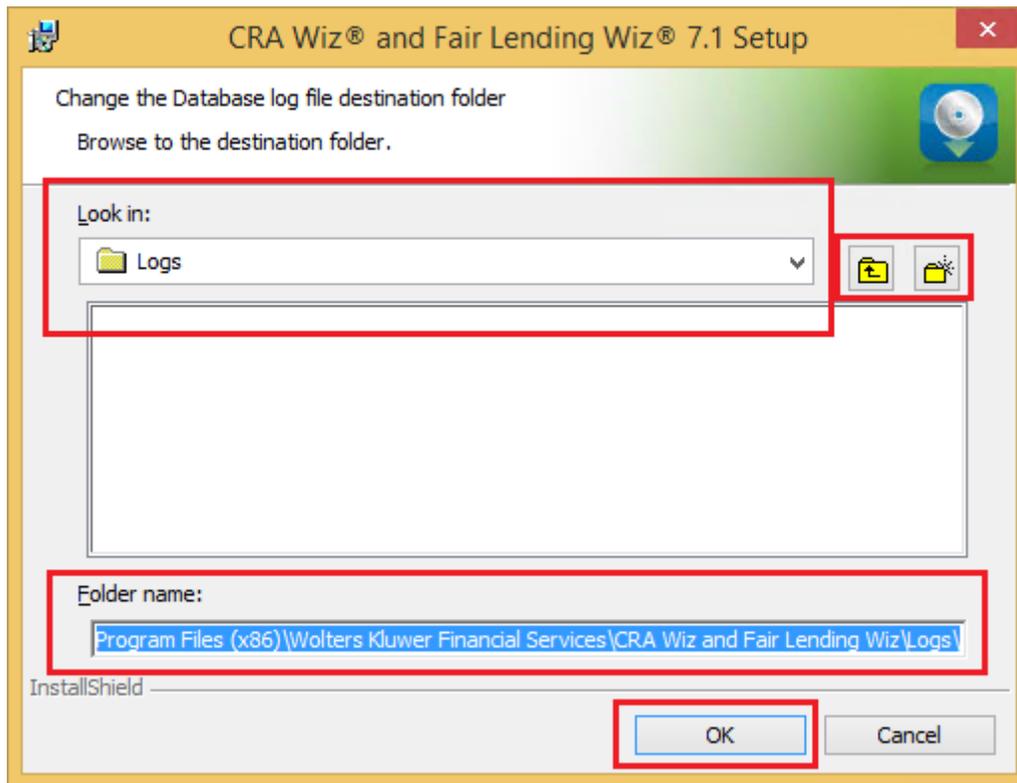
- Choose Database destination folder dialog box:



- Choose Database Log File Destination Folder dialog box:



2. In the appropriate dialog box, use the provided controls to select an alternate installation location, or type a path name in the **Folder name** 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.

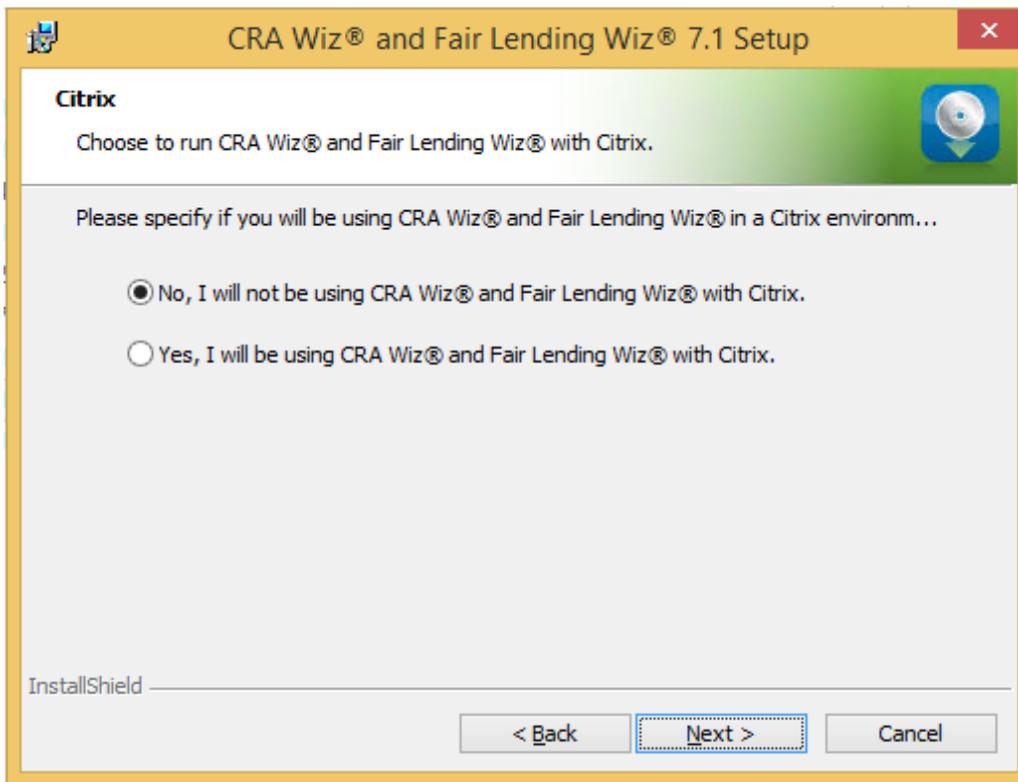
The installer makes the Choose Database Folders screen the active screen.

4. Click the **Next** button.

The software displays the **Citrix** screen.

Citrix Screen

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



To select Citrix preferences, 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:

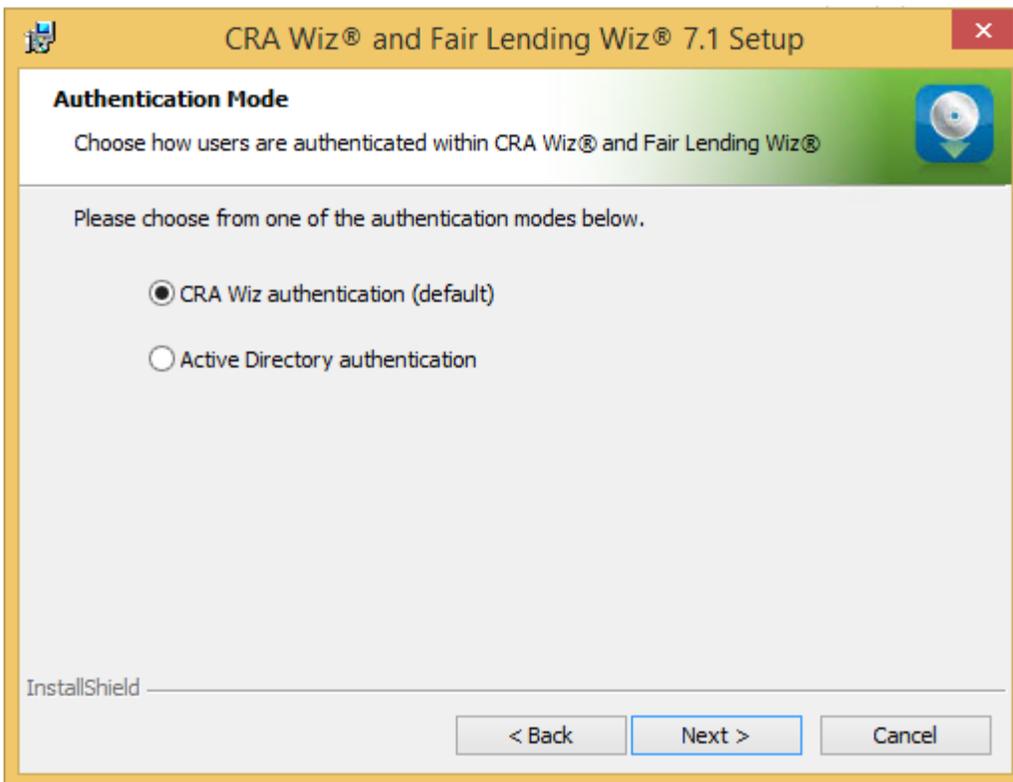
If you are not sure which type of computer network your institution uses, contact your network administrator.

2. Click the **Next** button.

The software displays the **Authentication Mode** screen.

Authentication Mode Screen

You use the **Authentication Mode** screen to specify how users will log into the program:



To select security settings, follow these steps:

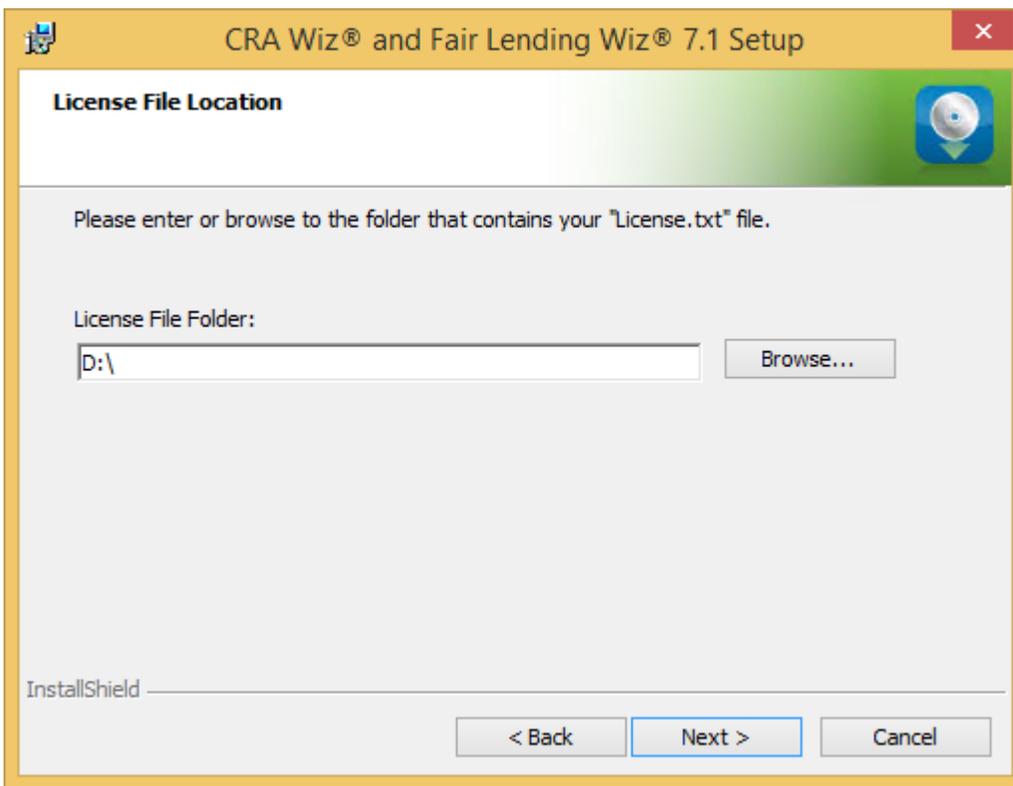
1. Select one of the following:
 - **CRA Wiz authentication (default)** - Select if you will log into the program using a *Wiz* user account and password. This is the default option.
 - **Active Directory authentication** - Select if you will log into the program automatically using a Windows user account 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 Location** screen.

License File Location 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:

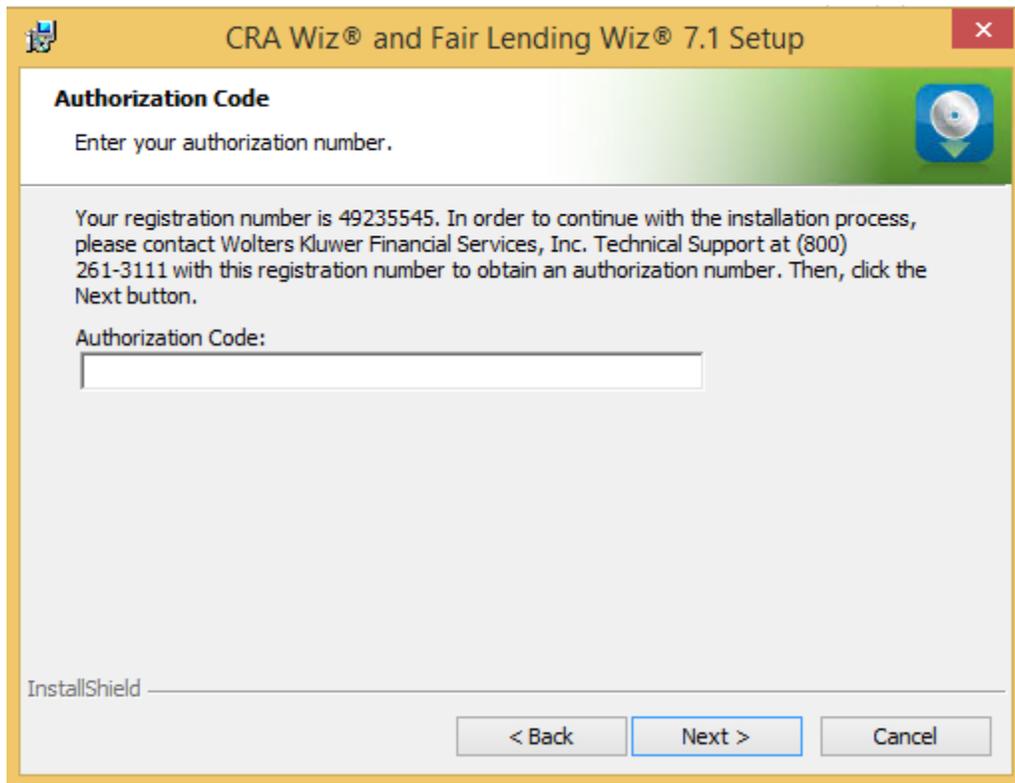
If you do not have a license file, please contact your Wolters Kluwer Financial Services Account Executive.

3. Click the **Next** button.

The software displays the **Authorization Code** screen.

Authorization Code Screen

You use the **Authorization Code** screen to authorize the software:



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

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

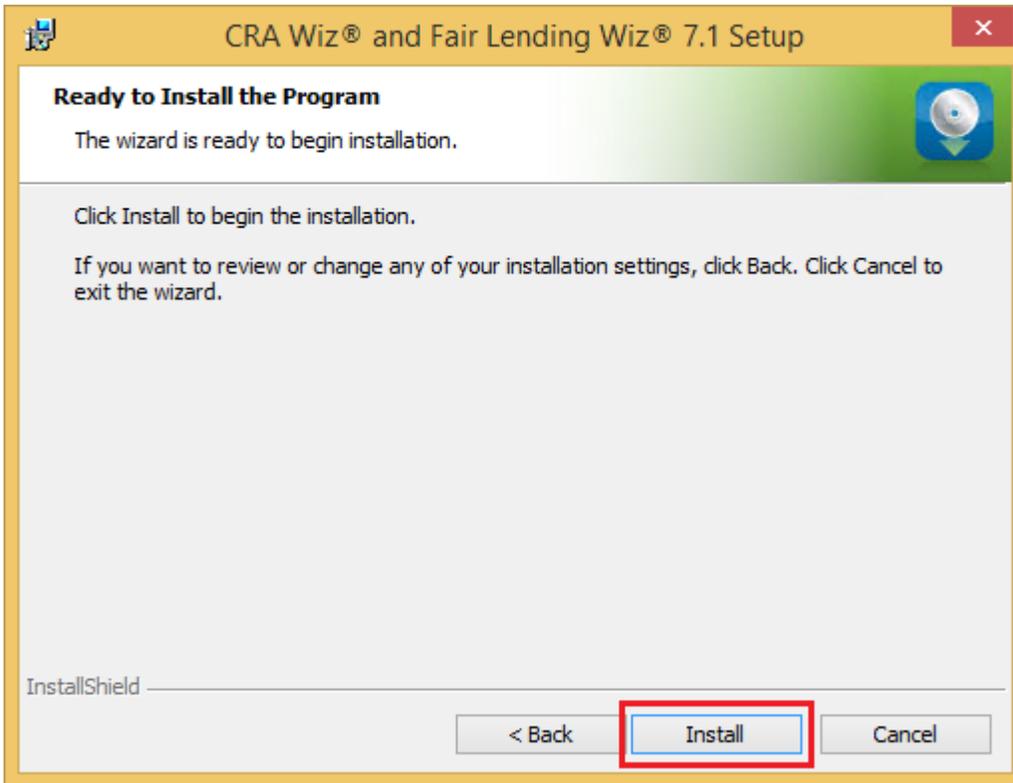
The phone number is **(800) 261-3111**. When prompted, select **option 1**.

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 installer installs the software:



Note:

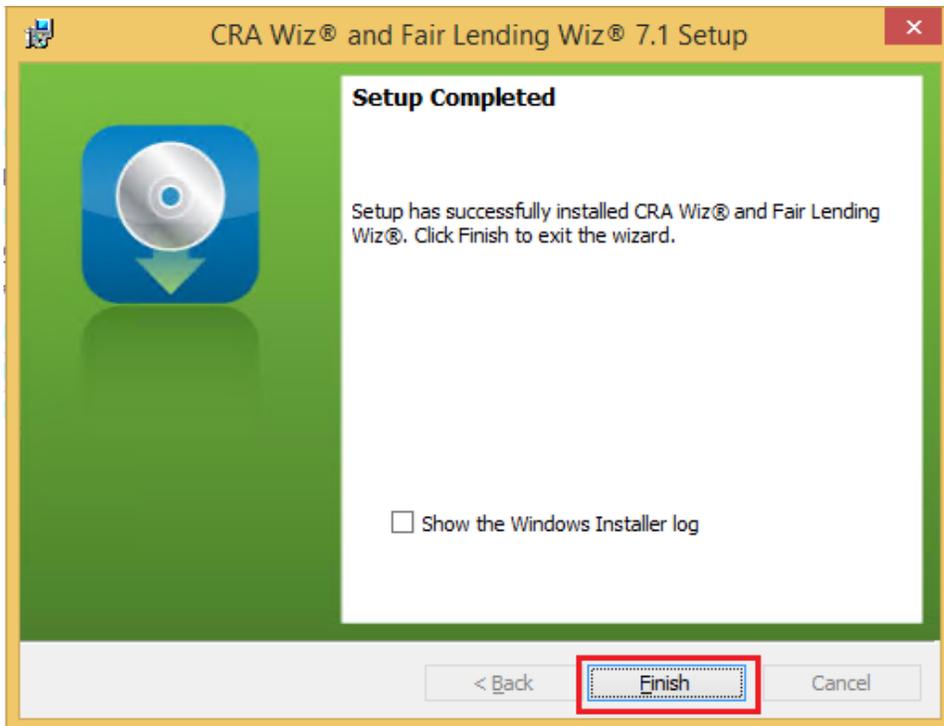
During installation the software displays a progress bar at the bottom of the installer window.

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:

1

Note:

If you want to view the Windows Installer log after quitting the installer, click the **Show the Windows Installer log** checkbox.

Click the **Finish** button.

Installation of *CRA Wiz Server* is complete.

Important!

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

Important!

If you want to install *CRA Wiz* and *Fair Lending Wiz* **data sets** (Geocoding 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* 7.1 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.

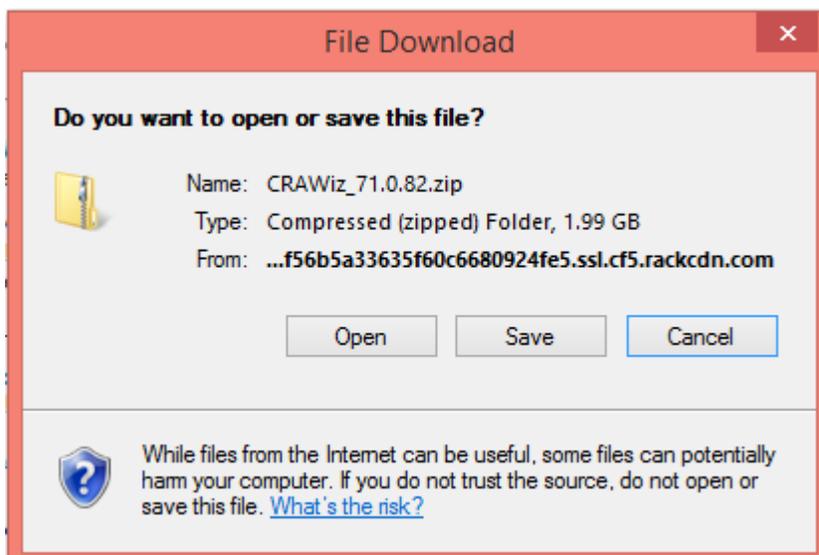
Note:

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* Server](#).

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

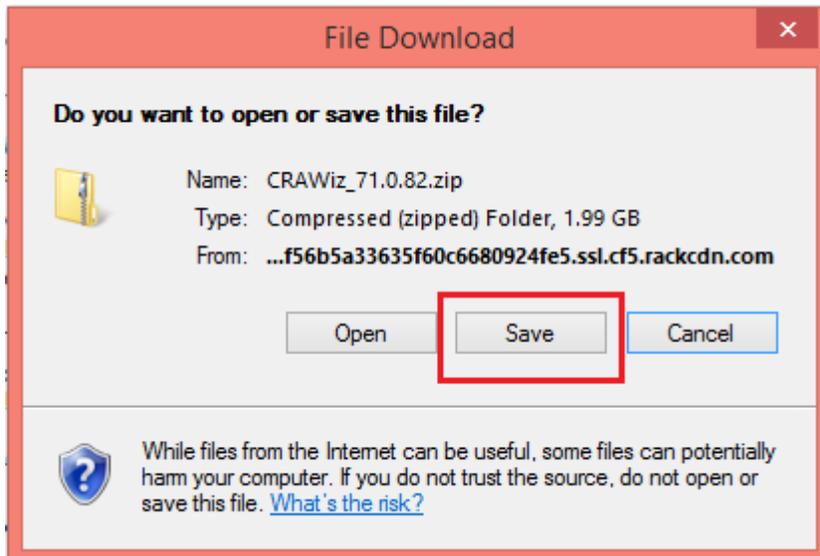
1. In the **Wiz Web Center**, click the **Installation Package** link.

Windows displays a **File Download** dialog box:



Note: The dialog box that Windows displays might differ from the above screenshot depending on your Windows version and computer configuration.

2. Click the **Save** button to download a copy of the installation package to your computer:



3. Extract the installation package.

Note: If you do not know how to extract the contents of a compressed folder, please contact your institution's computer support staff.

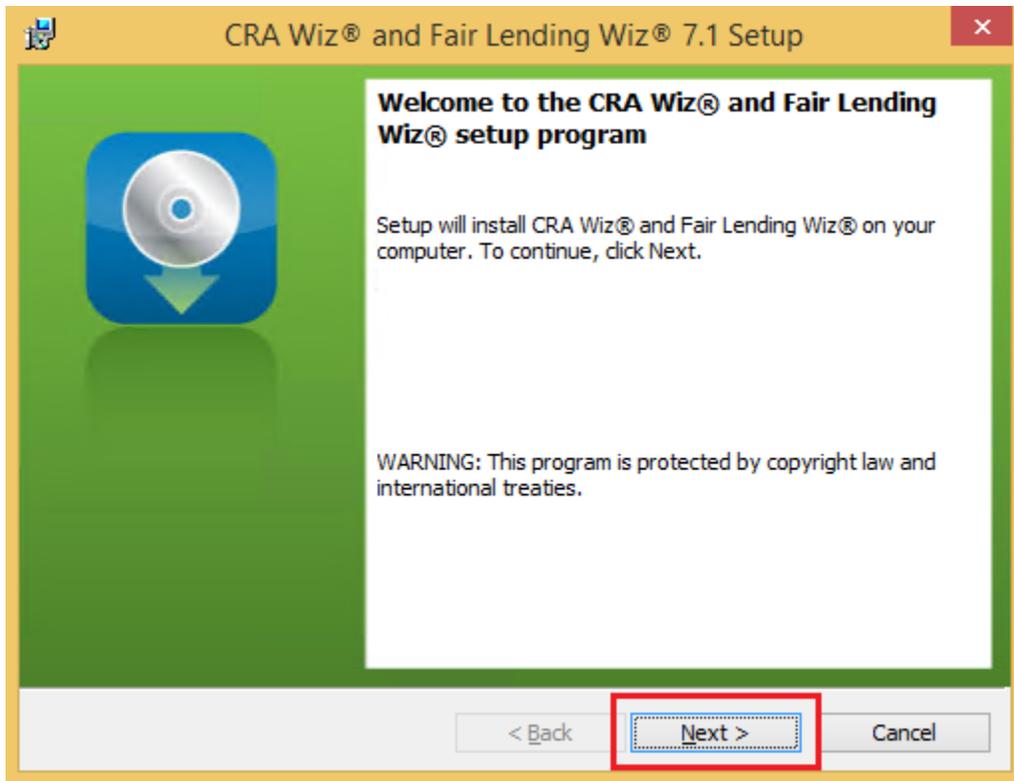
4. Confirm that the extracted installation folder is located on the machine where CRA Wiz and Fair Lending Wiz Client will be installed.
5. Open the installation folder and locate the Setup.exe file.
6. Right-click the Setup.exe file.

The software displays a contextual menu.

7. Select **Run as Administrator**.

The installer displays the **Welcome** screen.

Welcome Screen

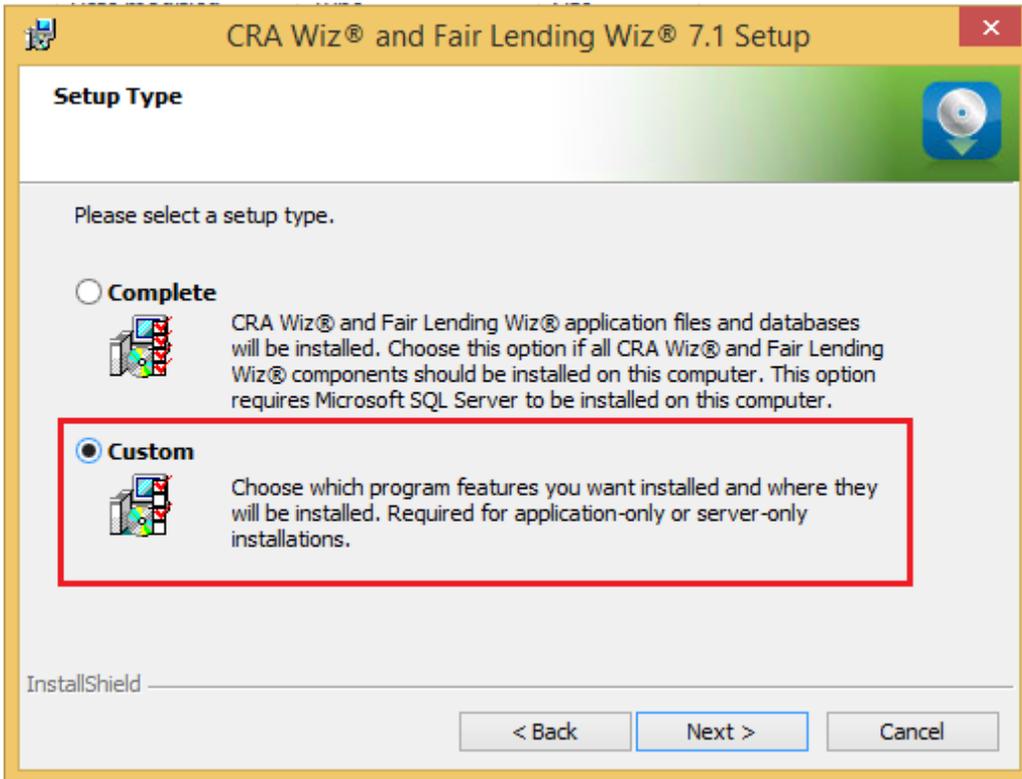


Click the **Next** button.

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

Setup Type Screen

You use the **Setup Type** screen to select **Wiz Client** for installation:



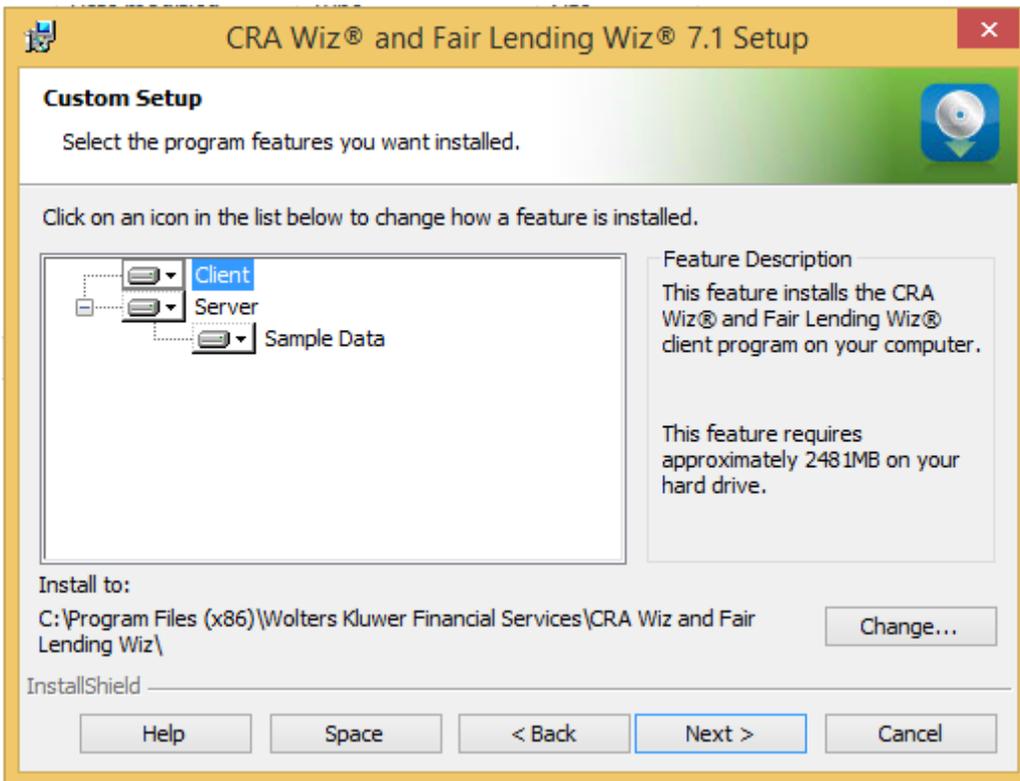
Select the **Custom** option.

Click the **Next** button.

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

Custom Setup Screen

You use the Custm Setup screen to select Client components to install:

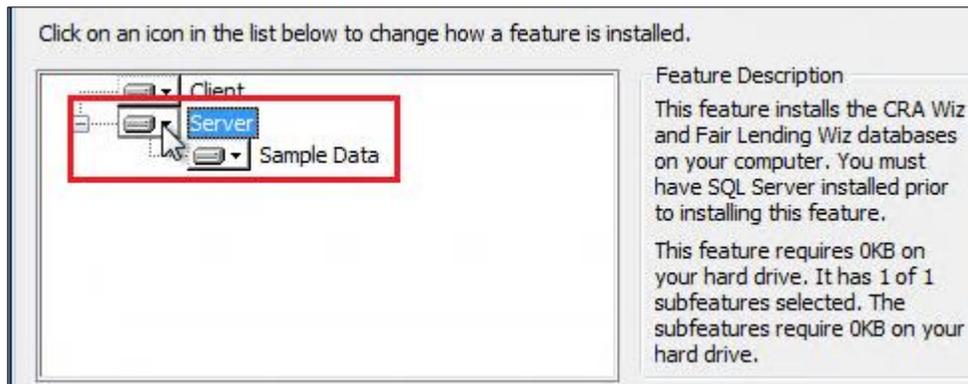


Note:

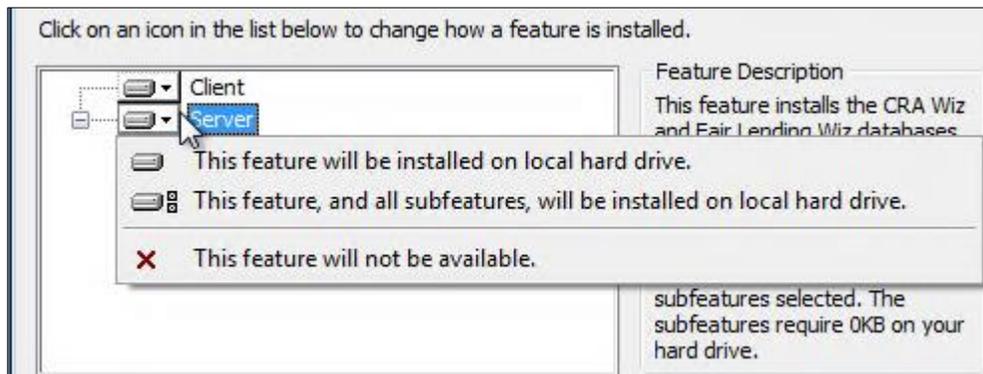
The installer displays this screen only if you selected the **Custom** option in the [Setup Type](#) screen.

To select components, follow these steps:

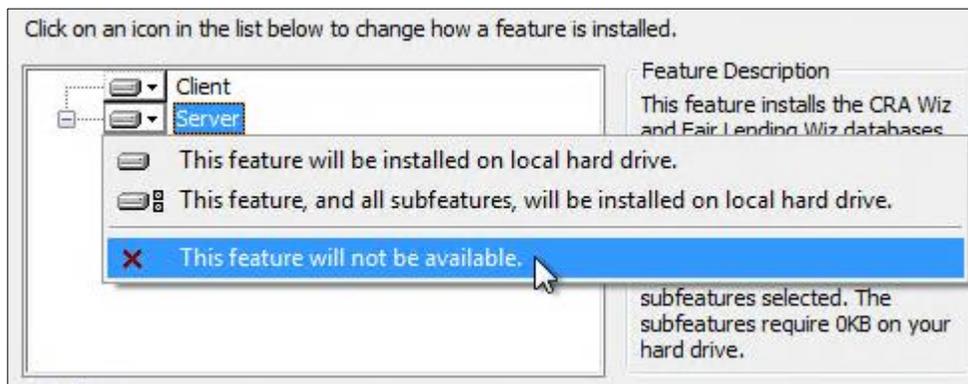
1. In the components list window, select the **Server** drop-down menu:



The software displays a contextual menu:



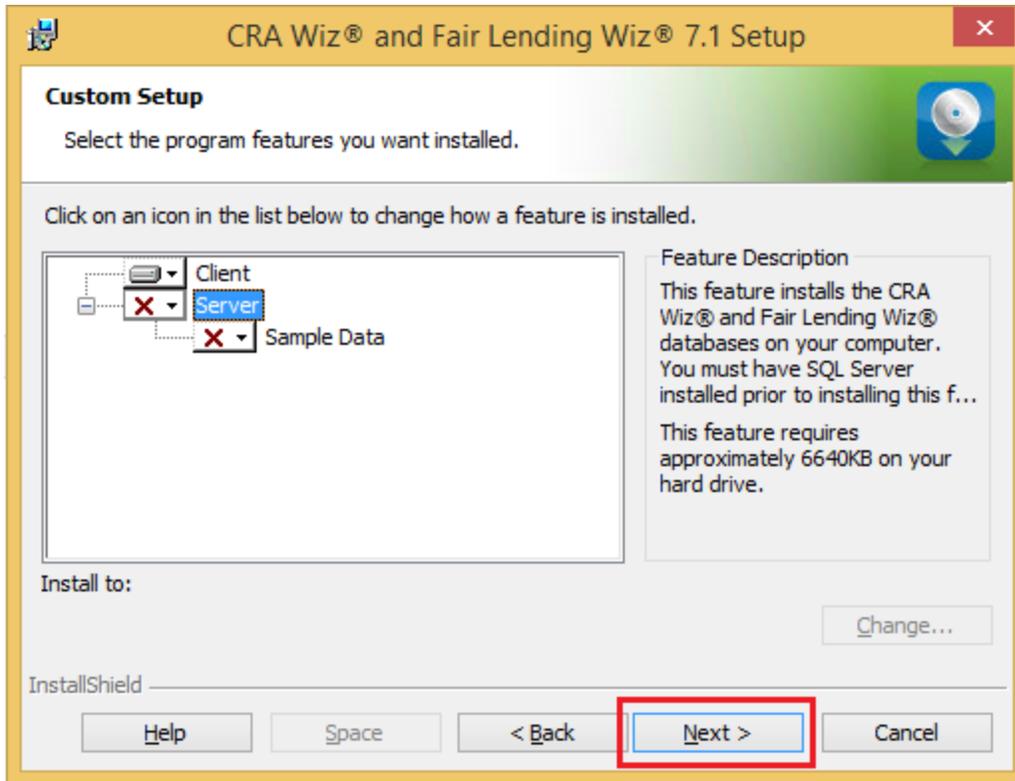
2. Select **This feature will not be available:**



Note:

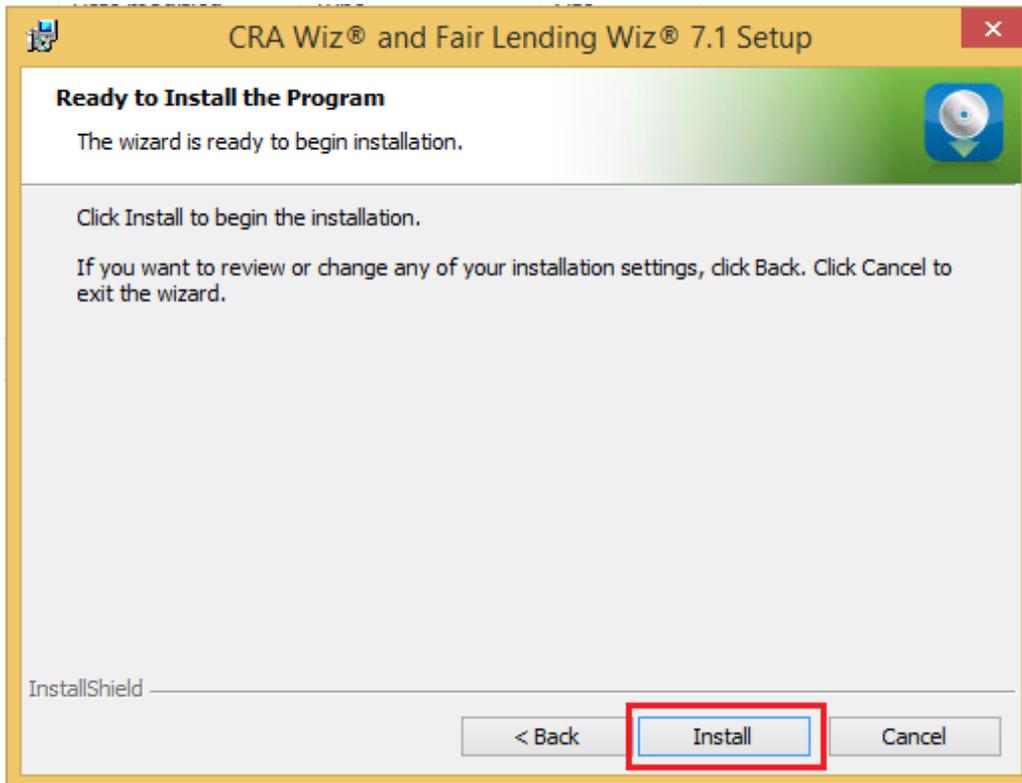
If you do not select at least one component, the software will display an error message.

3. Click the **Next** button:



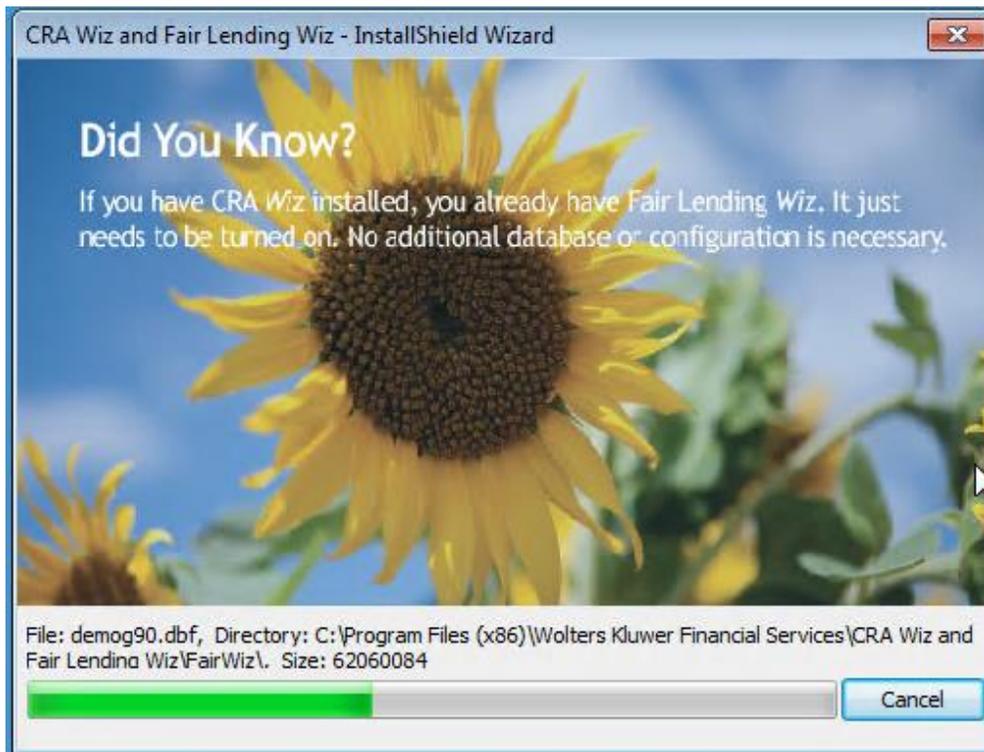
The software displays the **Ready to Install the Program** screen.

Ready to Install the Program Screen



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

The software installs *Wiz Client*:

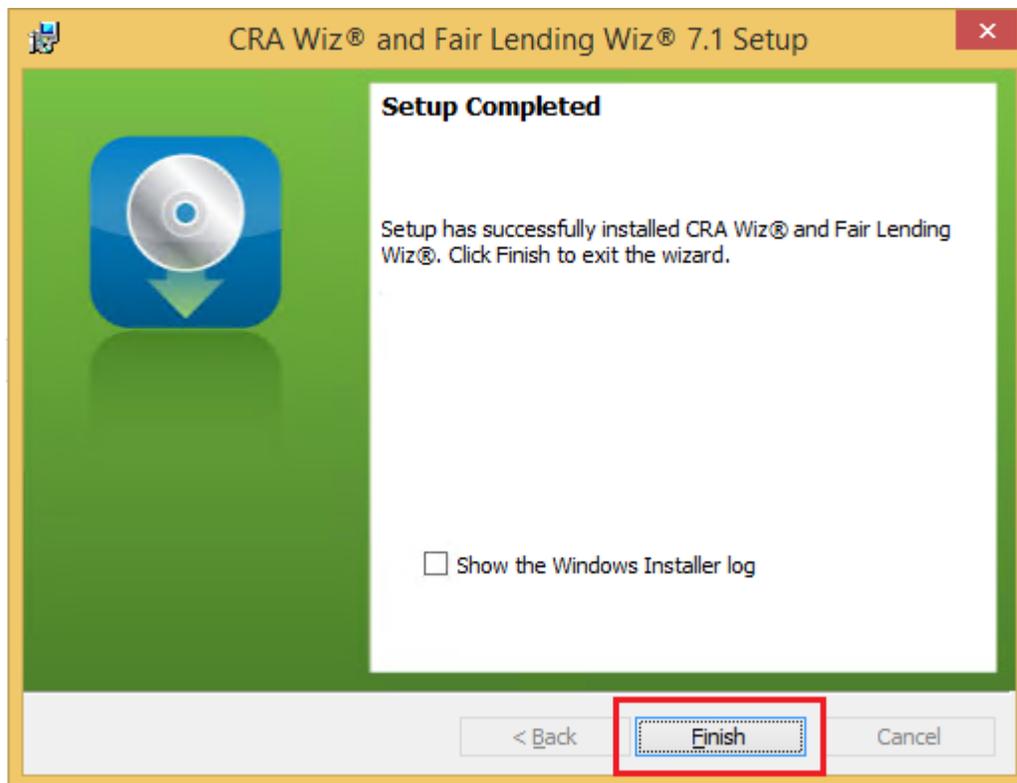


Note:

During installation the software displays a progress bar at the bottom of the installer window.

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

Setup Complete Screen



To complete installation, do 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:



The screenshot shows a login dialog box titled "Welcome to CRA Wiz & Fair Lending Wiz". It contains the following fields and controls:

- SQL Server Machine Name: A text box containing "(local)".
- User name: A text box containing "Atticus".
- Password: A text box containing "*****".
- Remember Password: A checked checkbox.
- Buttons: "Reset Password", "OK", and "Cancel".

- 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 the **Remember Password** checkbox if you want the software to retain your password for future log ins.
 3. Click the **OK** button.

The software displays the **Change 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.



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Financial Services

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