Consumer Compliance Solutions

CRA *Wiz* and Fair Lending *Wiz*

Installation Instructions – UPDATE Installation

Last Updated October 19, 2018

Wolters Kluwer

Consumer Compliance Solutions

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Overview

This document provides detailed information for **upgrading** your environment to the latest version of CRA *Wiz* and Fair Lending *Wiz*.

Who Should Install

All clients using CRA *Wiz* and Fair Lending *Wiz* are required to complete this update.

Where to Install

This update should be applied to both the application and the SQL server. In a typical networked environment, the installation should be run on both a client machine and a server.

Prerequisites

To apply an update to CRA *Wiz* and Fair Lending *Wiz*, you must have at least the latest major version already installed. For example, to upgrade to Version 7.3 Service Pack 2 (SP2), you must already have Version 7.3 SP1 installed.

Required Permissions

This installation requires writing and modification, SQL server access, and registry modifications. Wolters Kluwer recommends that the user running the install have both Windows admin and SQL Server admin login credentials.

Required Free Disk Space

Client side – 3 gigabytes (GB)
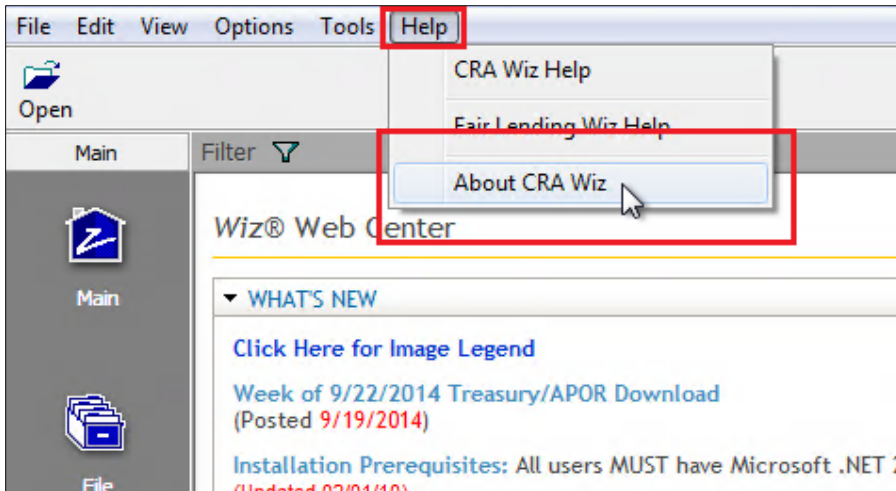Server side – 18 gigabytes (GB)

Approximate Install Time

Client side – 20 minutes
Server side – 1 hour

Confirming Installation

Open the CRA *Wiz* and Fair Lending *Wiz* application and select **Help** > **About CRA** *Wiz*:

When the upgrade has been completed, both the front and the back-end builds should match the build number included in the Release Notes:

Important!
Please read the included **Release Notes** before installing this update. The notes contain important information about the enhancements included in this update.

Important!
If you are running CRA *Wiz* and Fair Lending *Wiz* in a networked environment (computers with *Wiz* Client connected to a computer with *Wiz* Server), you must install the update on both your *Wiz* Client and *Wiz* Server computers.

Installation

To install the CRA *Wiz* and Fair Lending *Wiz* update, follow these steps:

1. Back up your SQL databases.

   Wolters Kluwer recommends that institutions back up their SQL databases prior to installing a CRA *Wiz* & Fair Lending *Wiz* program update. Databases that should be backed up include:

   - ObjectStore
   - General
   - USCensus
   - CRB
   - Procedures

   For detailed instructions how to back up a database refer to **Procedures for Backing Up CRA *Wiz* & Fair Lending *Wiz* Databases**, available on the CRA *Wiz* and Fair Lending *Wiz* **Web Center** via the following link:

   [DATABASE BACK UP PROCEDURES](#)

   Or consult your Database Administrator.

   Important!
   It is strongly recommended that you exit all Windows™ programs before running this installation. This installation updates selected program files, but does not overwrite any user imported files or custom settings created in prior versions.

2. Download the update locally where CRA *Wiz* and Fair Lending *Wiz* is installed.
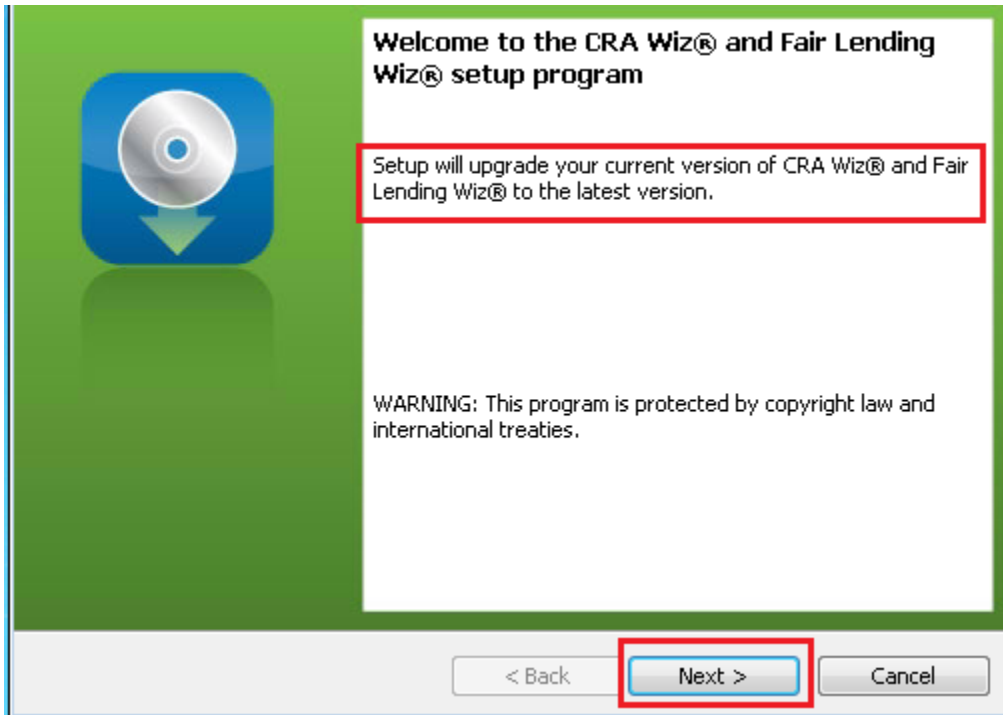3. Right-click the **setup**.**exe** file.

   The software displays a contextual menu.

4. Select **Run as Administrator**.

   The installer displays the **Welcome** screen.

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

6. Click the **OK** button.

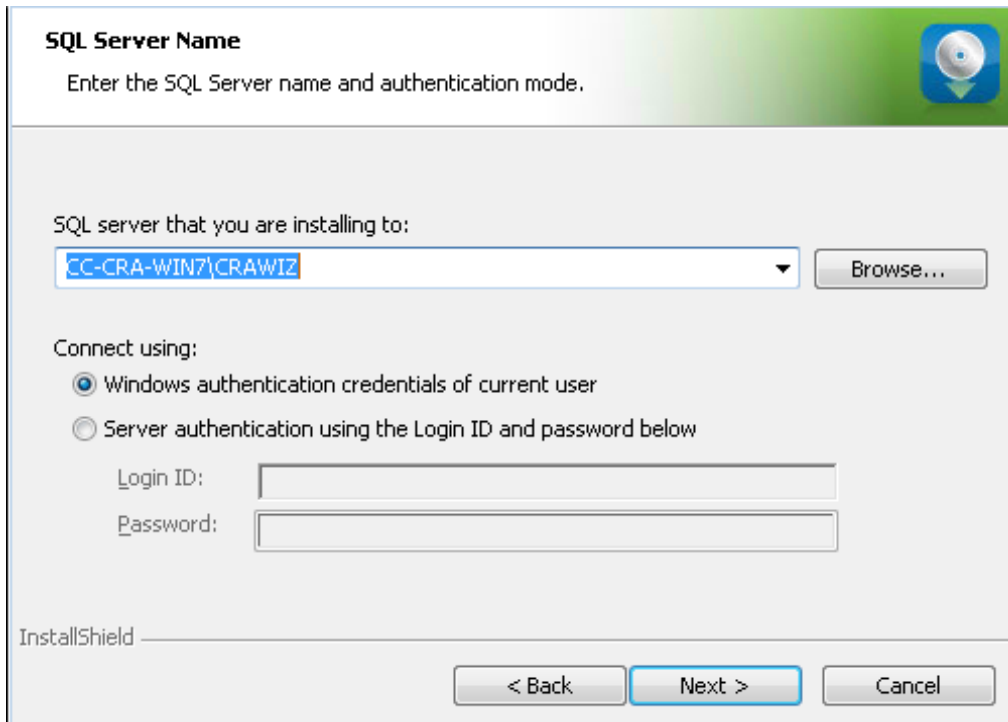   The software displays the **Welcome** screen:

Note:
The Welcome screen text indicates that you are about to update the current version of CRA *Wiz* and Fair Lending Wiz. If the installer does not detect your current installation of CRA *Wiz* and Fair Lending *Wiz*, please contact **Wolters Kluwer Technical Support at 1-800-261-3111**.When prompted, select **option 1**.
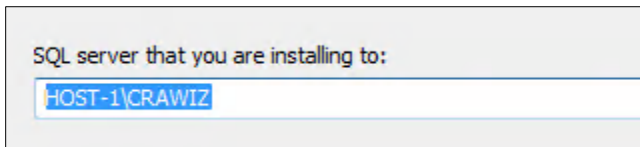
7. Click the **Next** button.

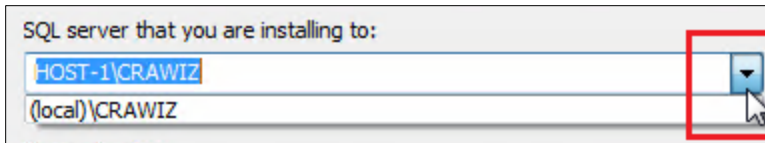The software displays the **SQL Server Name** screen:

Note:
The software displays the SQL 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 **Ready to Install the Program** screen. **Skip to Step 11**.
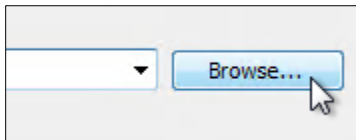
8. In the **SQL server that you are installing to:** field, do one of the following:
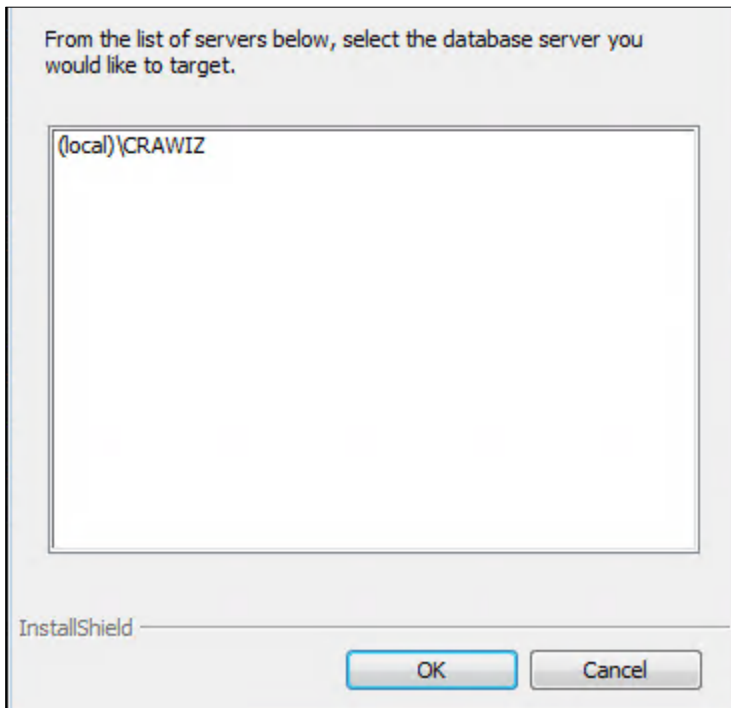   * Enter the name of the SQL Server to which you are installing the data:

   * Click the drop-down arrow located at the end of the field to select the Database server from a menu list:

- Click the **Browse** button:

Then select the database server from the resultant dialog box:

9. 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.

10. Click the **Next** button.

   Important:
   If your SQL Server installation does not meet requirements for installing CRA *Wiz* and Fair
   Lending *Wiz*, the software displays the following message:
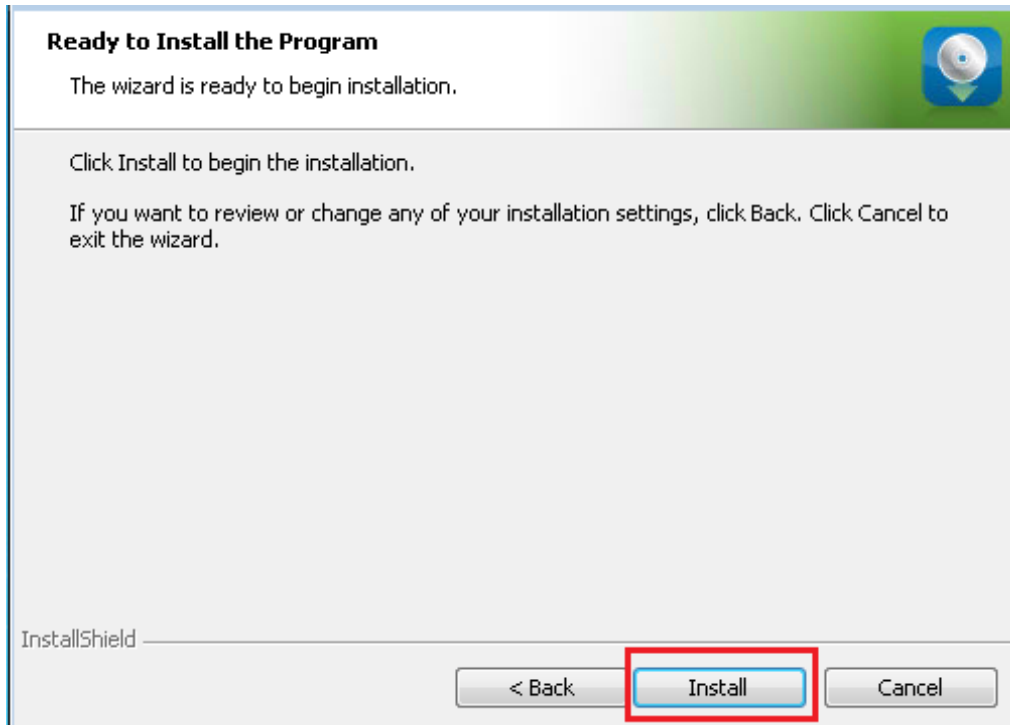

   If the software displays this message, contact **Wolters Kluwer Technical Support** at
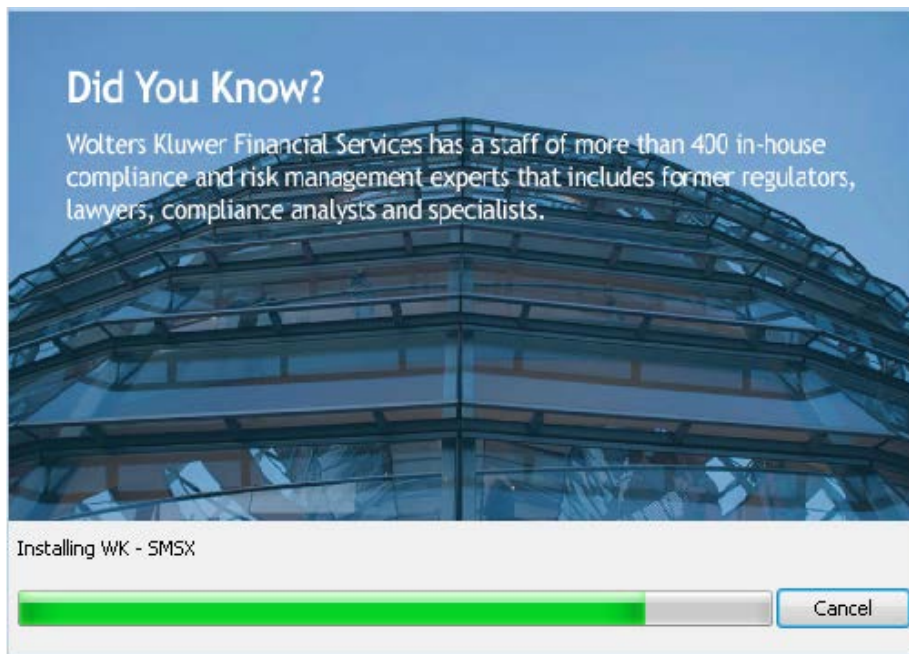   **1-800-261-3111** for assistance.

   Do one of the following:
   - Click the **Yes** button button **proceed** with installation.
   - Click the **No** button to **cancel** the installation.

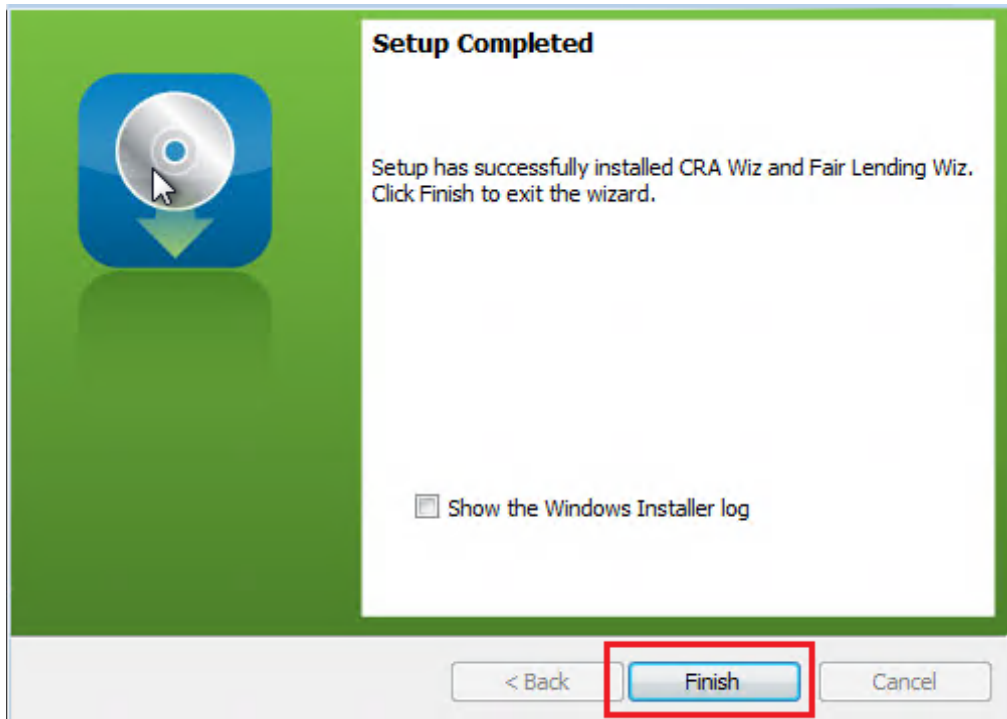   The software displays the **Ready to Install the Program** screen:

11. Click the **Install** button. The installer runs the update:

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

When installation is complete, the installer displays the **Update Complete** screen:

12. To exit the installation, click the **Finish** button.

    Installation is complete.

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

Appendix A: Technical Reference

✓ Wolters Kluwer currently supports your CRA *Wiz* and Fair Lending *Wiz* software using MS SQL Server 2008R2, 2012, 2014, and 2016 (Standard, Enterprise, and Express editions), with the SQL Server upgrade patches supported by Microsoft.

✓ CRA *Wiz* and Fair Lending *Wiz* 7.3 SP2 update requires CRA *Wiz* and Fair Lending *Wiz* 7.3SP1; Microsoft Windows Server 2008™, Microsoft Windows Server 2008 R2™, Microsoft Windows Server 2012™, Microsoft Windows Server 2016™, Microsoft Windows 7™, Microsoft Windows 8™, or Microsoft Windows 10.™

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