CRA *Wiz* and Fair Lending *Wiz*:

Installation Instructions – NEW Installation

Last Updated November 8, 2019

Wolters Kluwer

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Overview

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

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.

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 **CRA Wiz and Fair Lending Wiz Hardware and Software Requirements** document available under the **Resources** tab on our Wiz Webcenter.

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

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

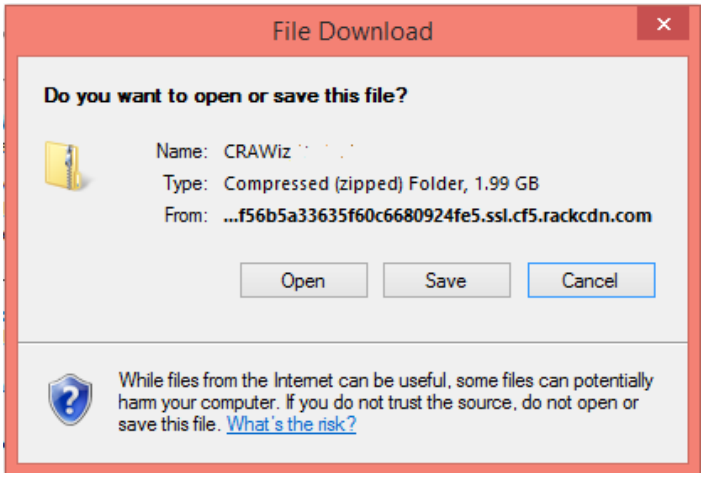
Use the following procedures if SQL is already installed on the target computer and you want to install CRA *Wiz* and Fair Lending *Wiz* **Server** and **Client**.

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 your 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. Supported SQL Server versions are covered in the **CRA Wiz and Fair Lending Wiz Hardware and Software Requirements** document available under the **Resources** tab on our Wiz Webcenter.

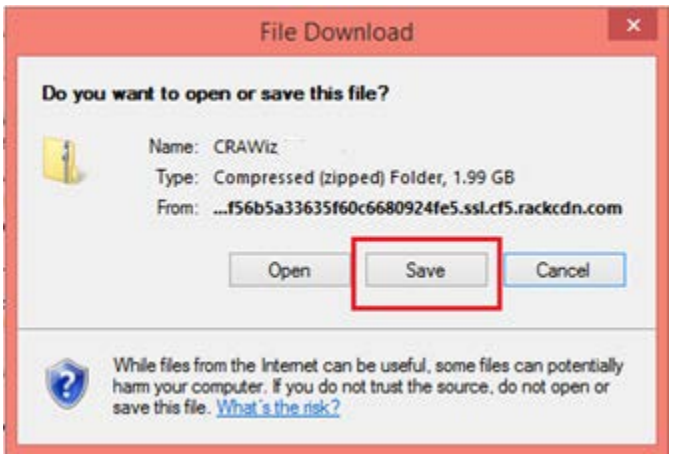
1. In the **Wiz Web Center**, click the **Installation Package** link.

   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.

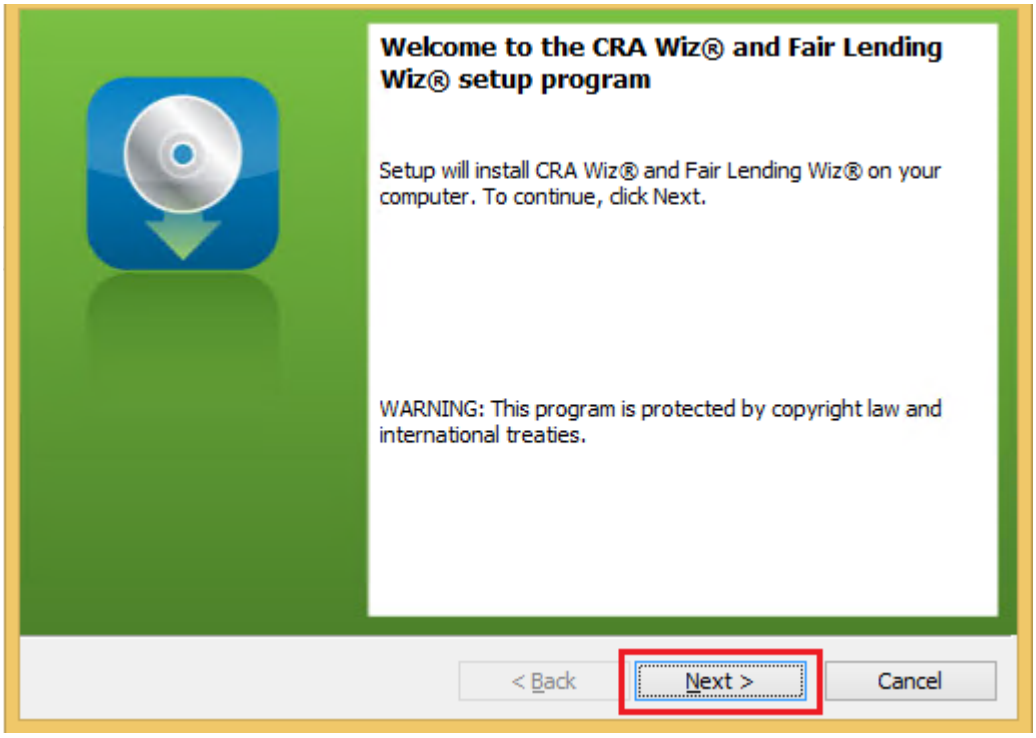
6. Right-click the **Setup.exe** file.

   The software displays a contextual menu.

7. Select **Run as Administrator**.

   The installer displays the **Welcome** screen.

Welcome Screen

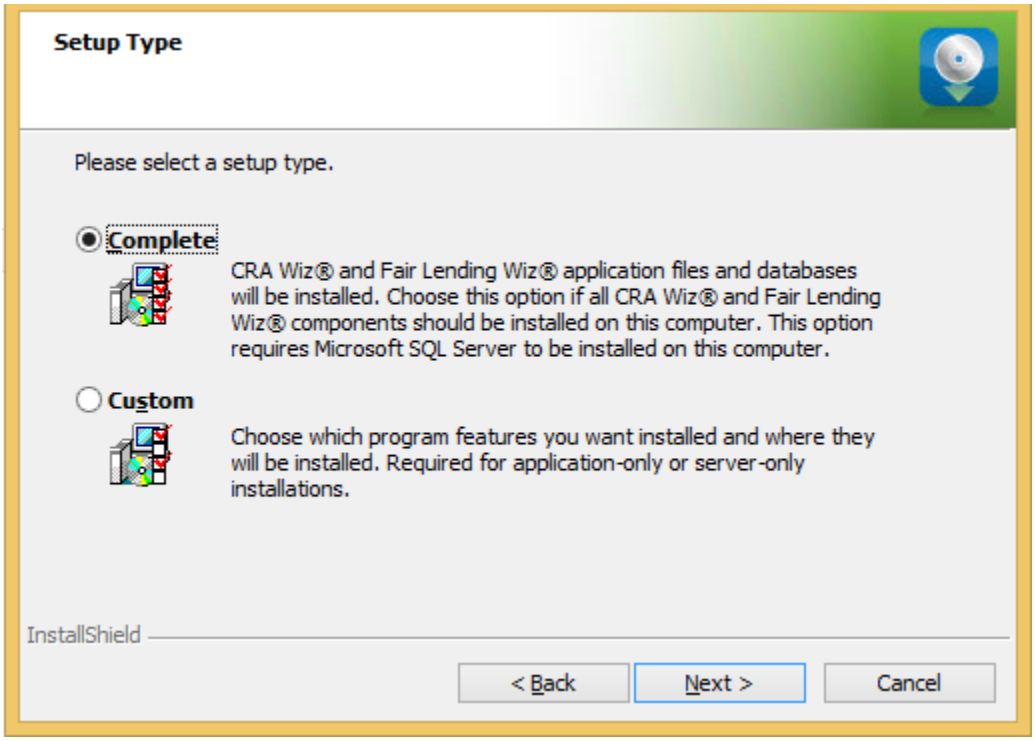


Click the **Next** button.

The software displays the **Setup Type** screen

Setup Type Screen

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

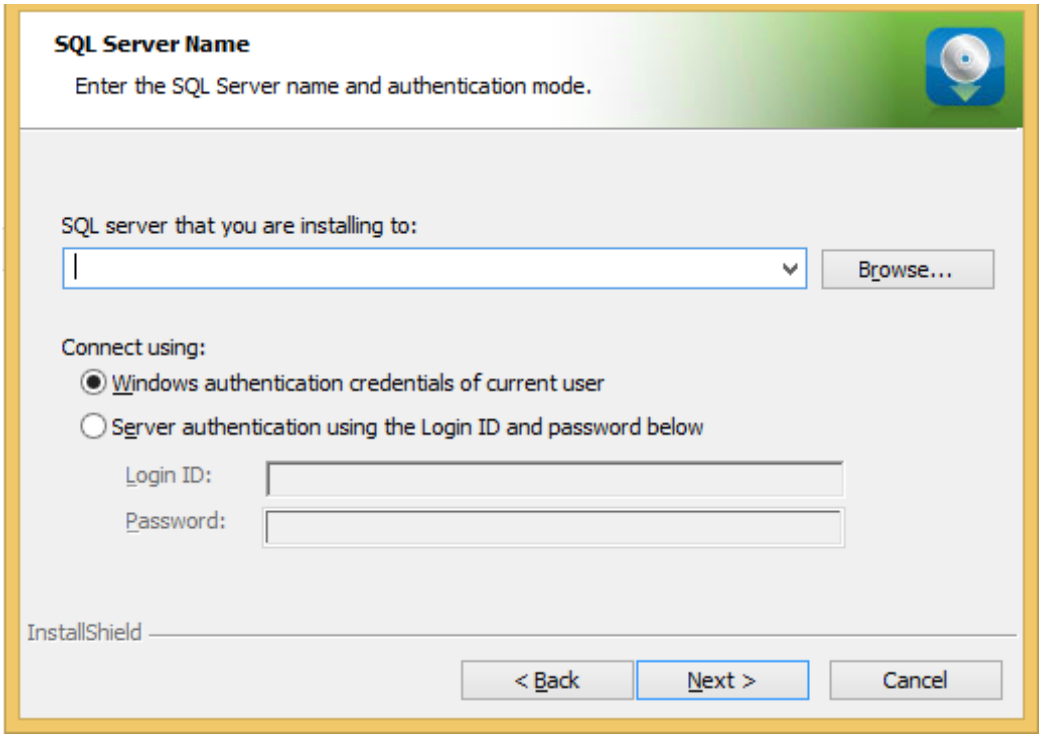


1. Confirm the default option, **Complete**.
2. Click the **Next** button.

   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.

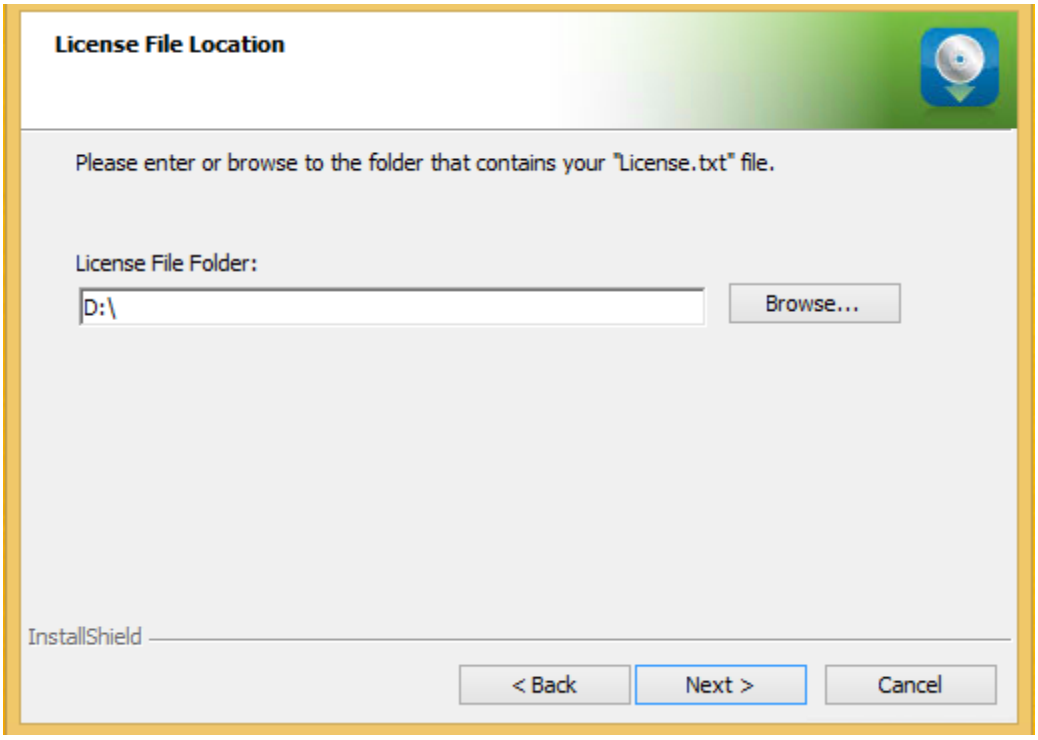
2. Do one of the following:

- 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 **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**.

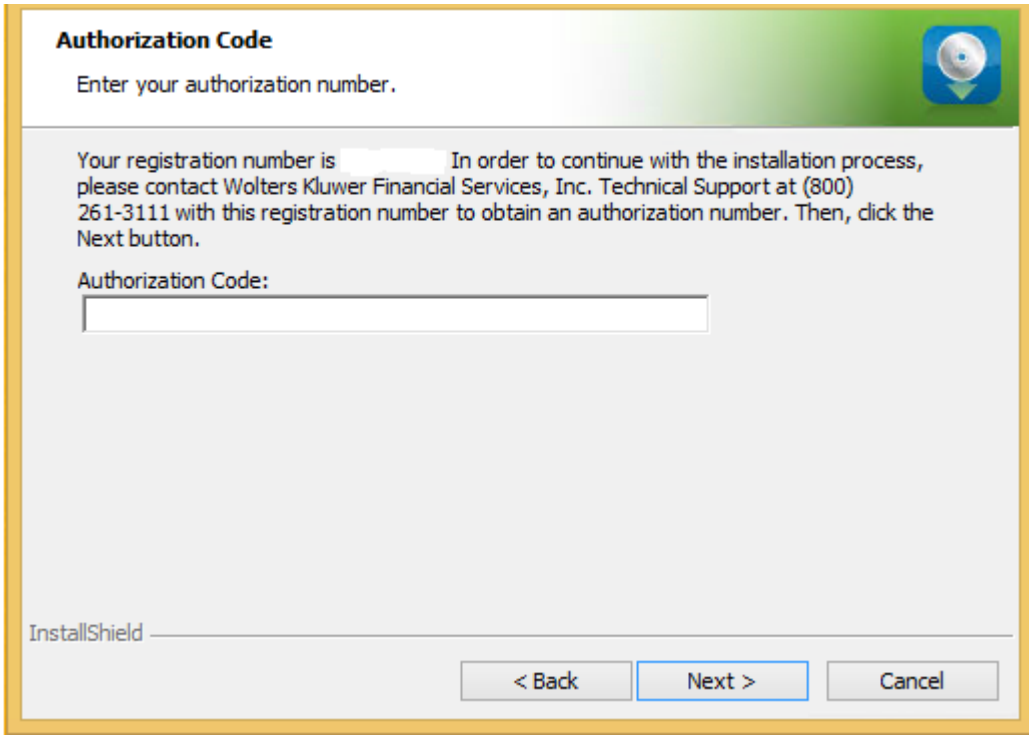
   Note:
   If you do not have a license file, please contact your Wolters Kluwer Financial Services Account Executive.

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

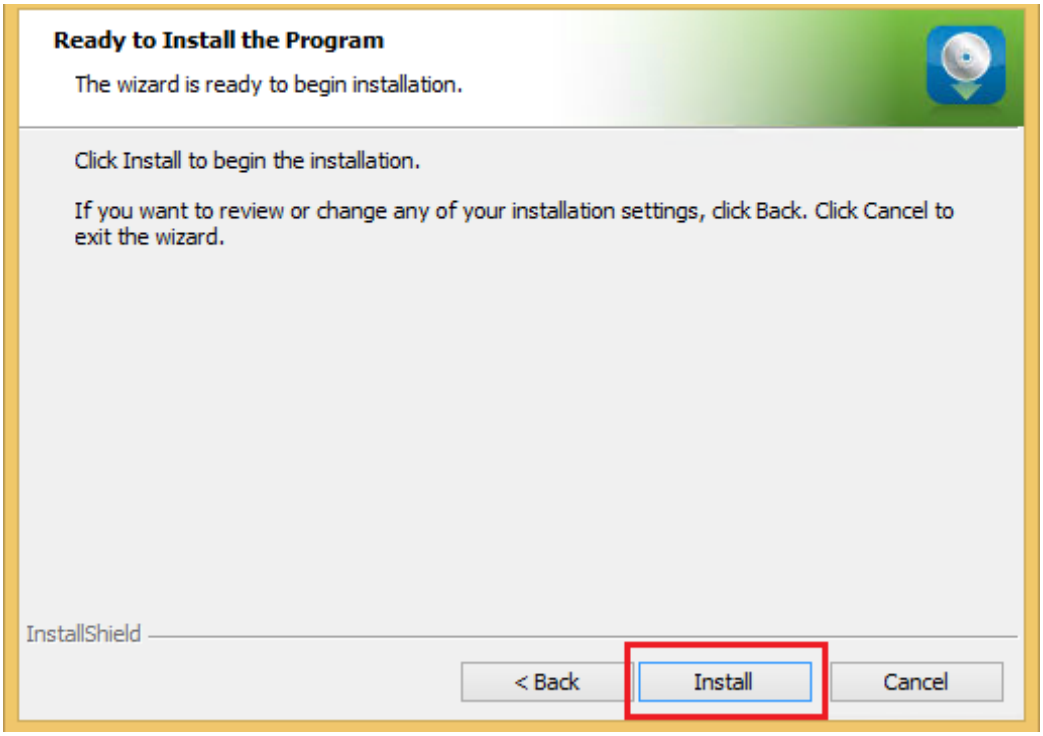
   The phone number is **(800) 261-3111**. When prompted, select **option 1** then **option 1**. The email address is CRAWizSupport@wolterskluwer.com.

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

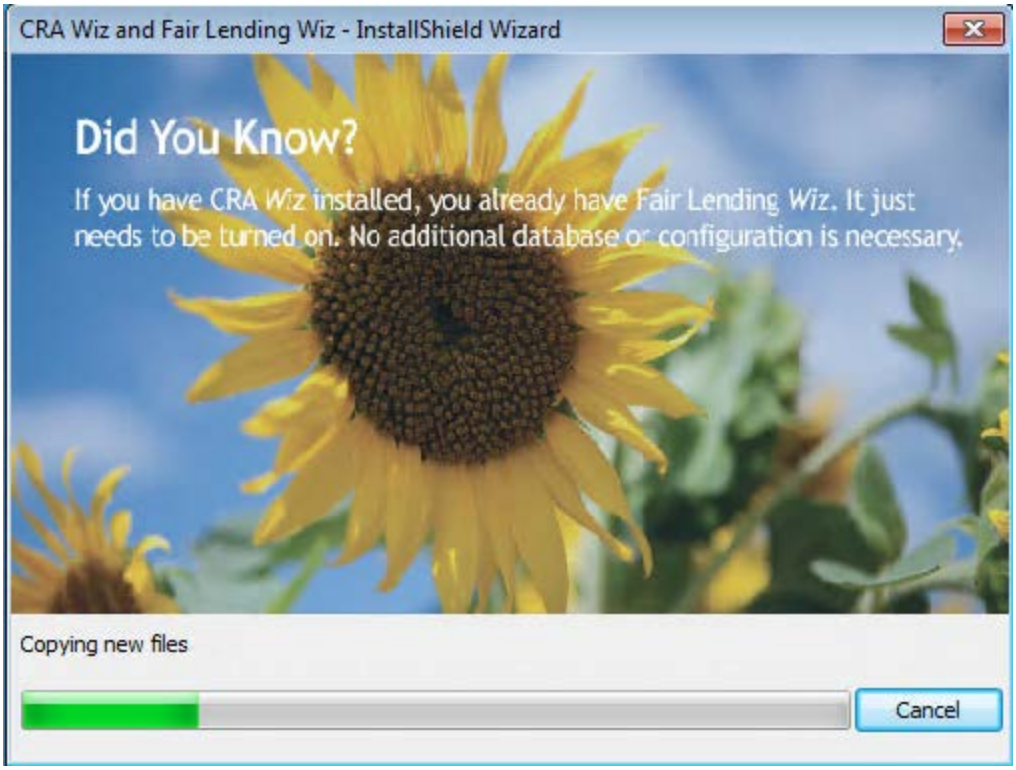
   The software displays the **Ready to Install the Program** screen

Ready to Install the Program Screen

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



The installer installs the software:

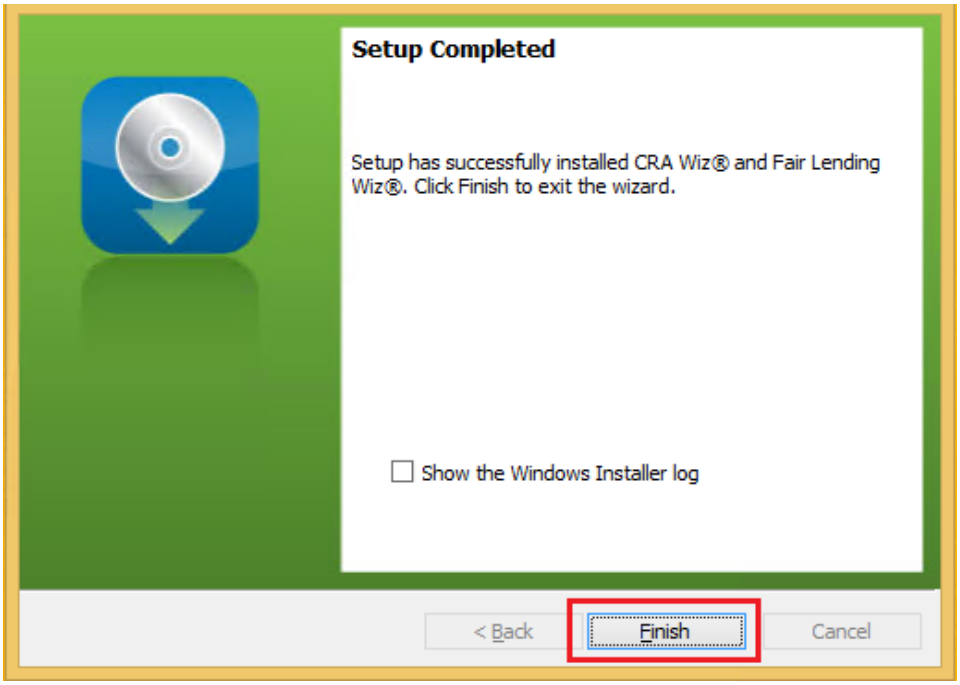


Note:
During installation the software displays a progress bar at the bottom of the installer window.

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 Completed 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 c**heckbox.

Click the **Finish** button.

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

Important!
Wolters Kluwer 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* Server

The following section provides procedures for installing CRA *Wiz* and Fair Lending *Wiz* 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 *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:

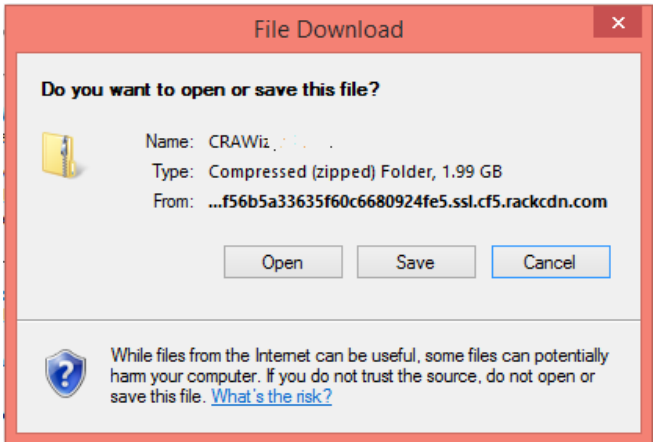
- If there are already folders for the CRA *Wiz* database files named **Data** and **Logs** give the Windows user security read and write access to those folders.

- If there are not already folders created, please create a **Wolters Kluwer Financial Services** folder in the **C:\Program Files (x86)** folder and give the Windows user security read and write to the folder.

To install *Wiz* Server, follow these steps:

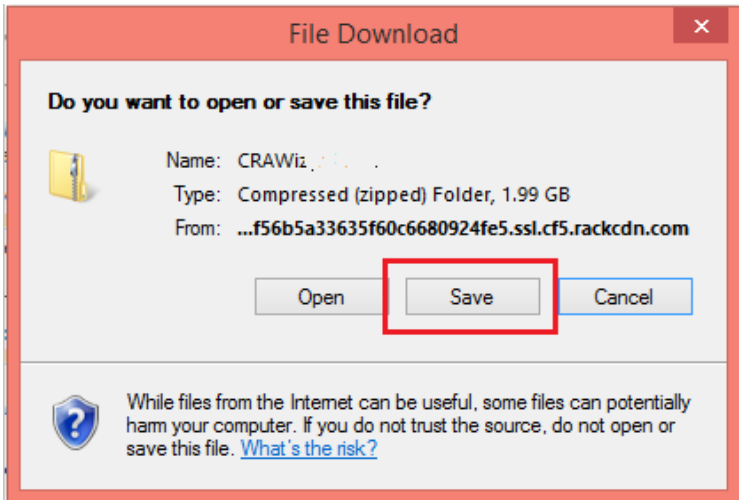
1. In the **Wiz Web Center**, click the **Installation Package** link.

   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 internal IT team for assistance.

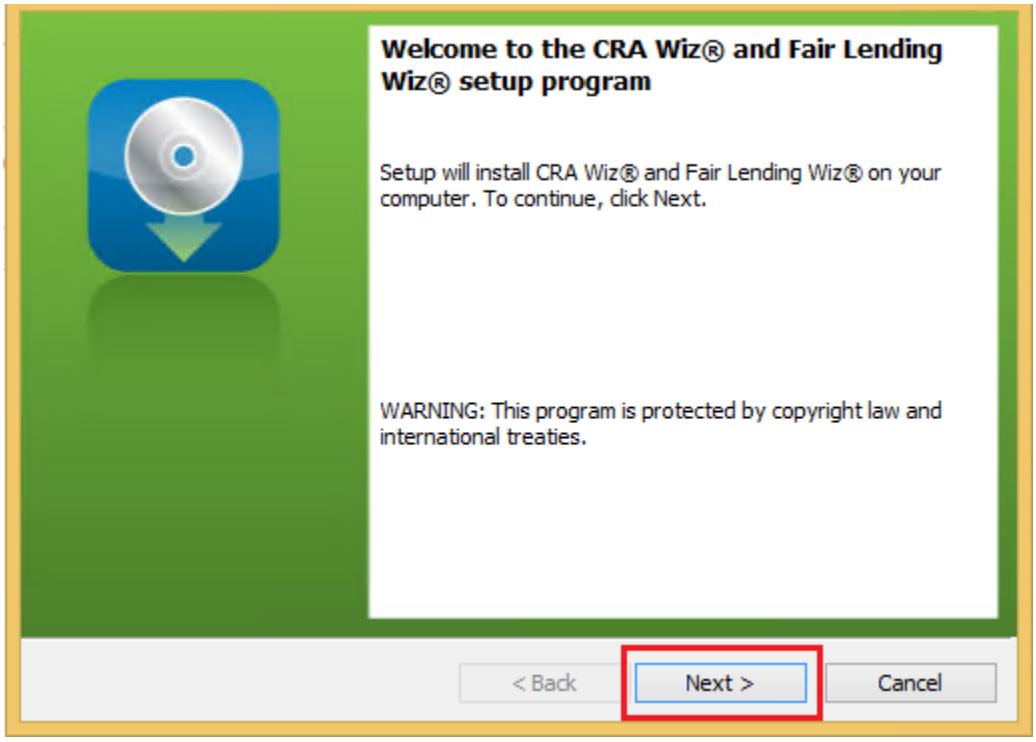
4. Confirm that the extracted installation folder **is located on the machine where you want to install CRA *Wiz* and Fair Lending *Wiz* Server**.

5. Open the installation folder and locate the **Setup.exe** file.

6. Right click the **Setup.exe** file and choose **Run as Administrator**.

   The installer displays the **Welcome** screen.

Welcome Screen

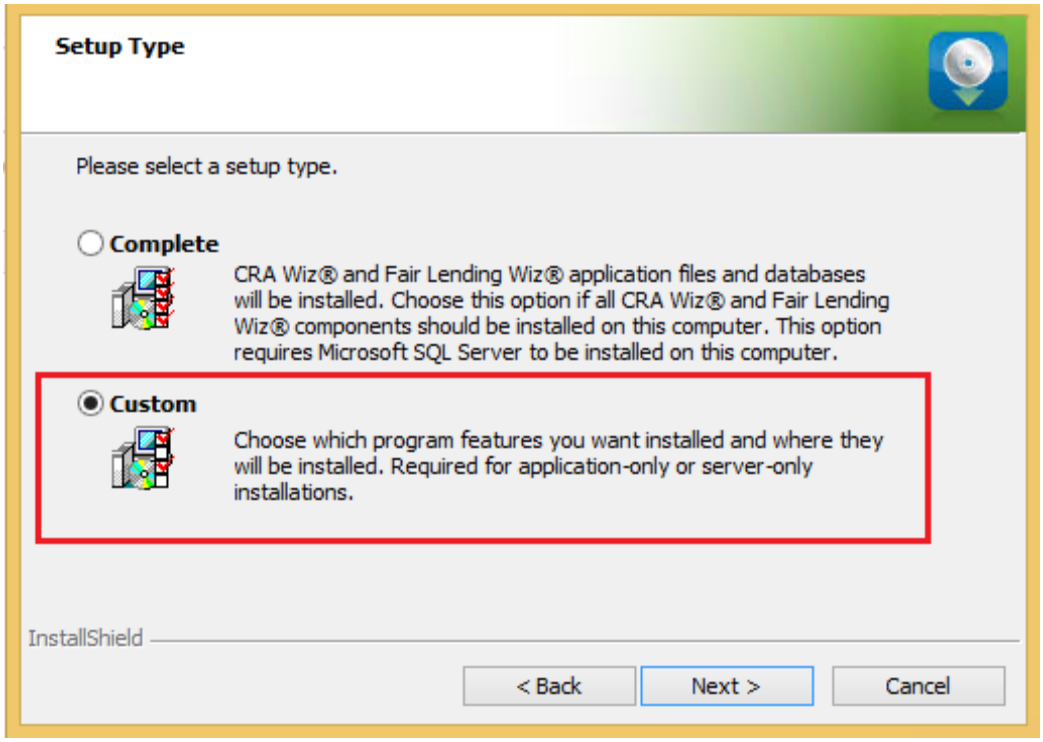


Click the **Next** button.

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

Setup Type Screen

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

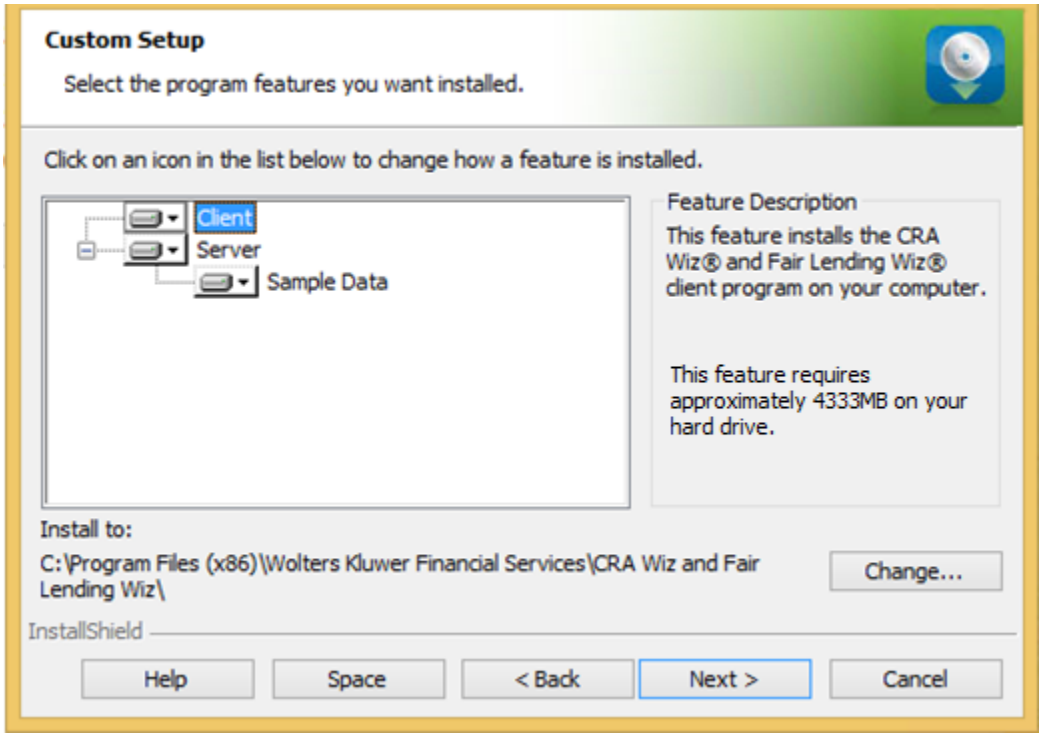


1. Select the **Custom** option.
2. Click the **Next** button.

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

Custom Setup Screen

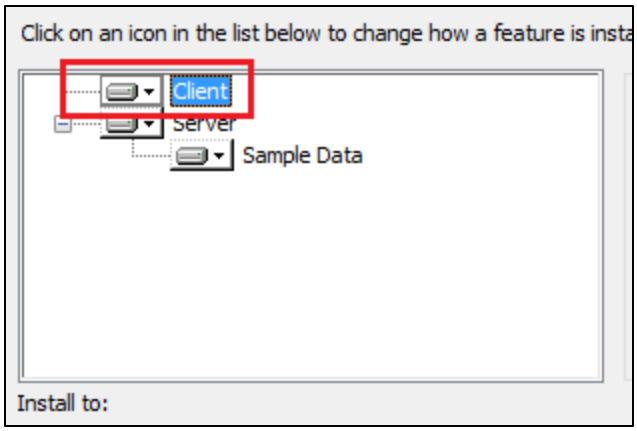
You use the **Custom Setup** screen to select the *Wiz* Server components for installation:



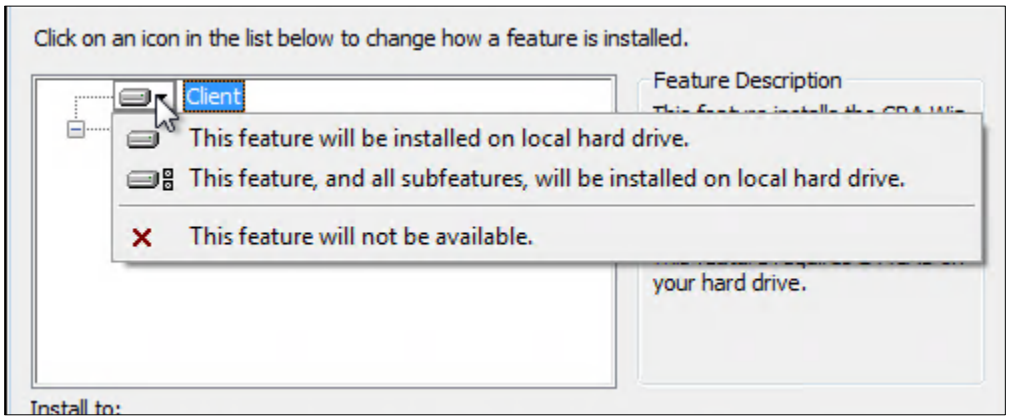
Note:
This screen displays only for custom installations.

To select Server installation components, follow these steps:

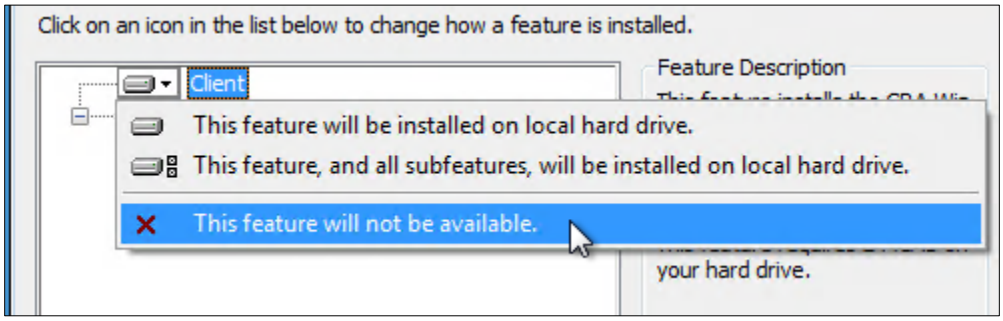
1. In the components list window, select the **Client** drop-down menu:



The software displays a contextual menu:

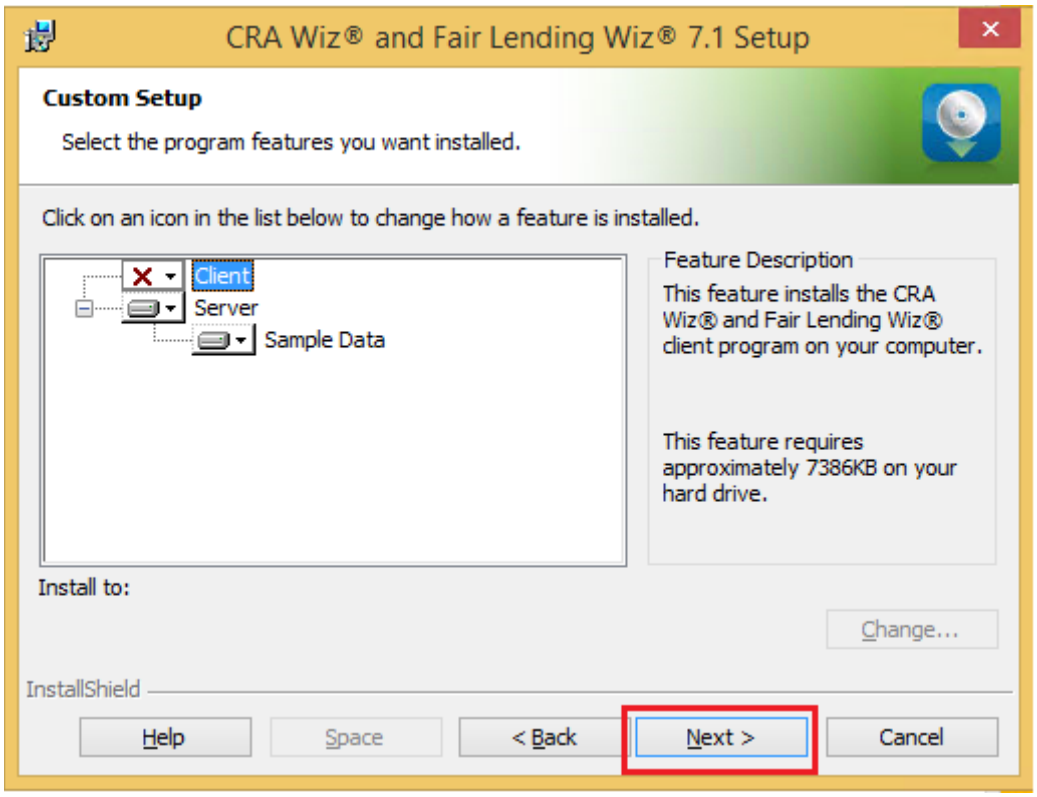


2. Select **This feature will not be available**:



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

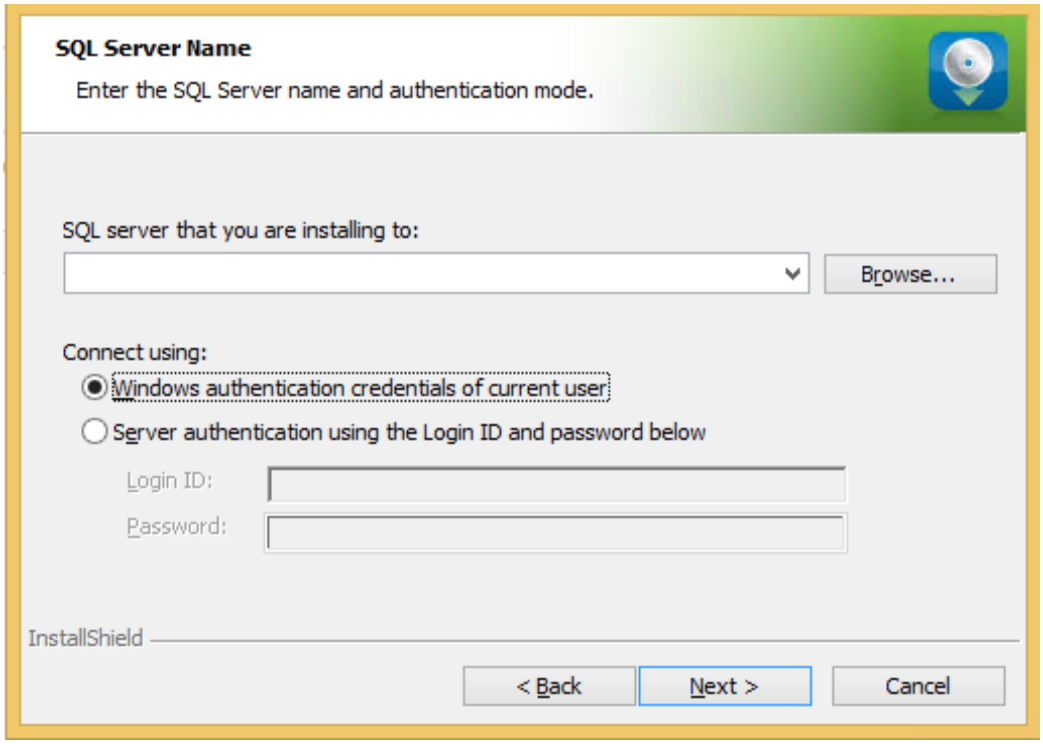
3. Click the **Next** button:



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:

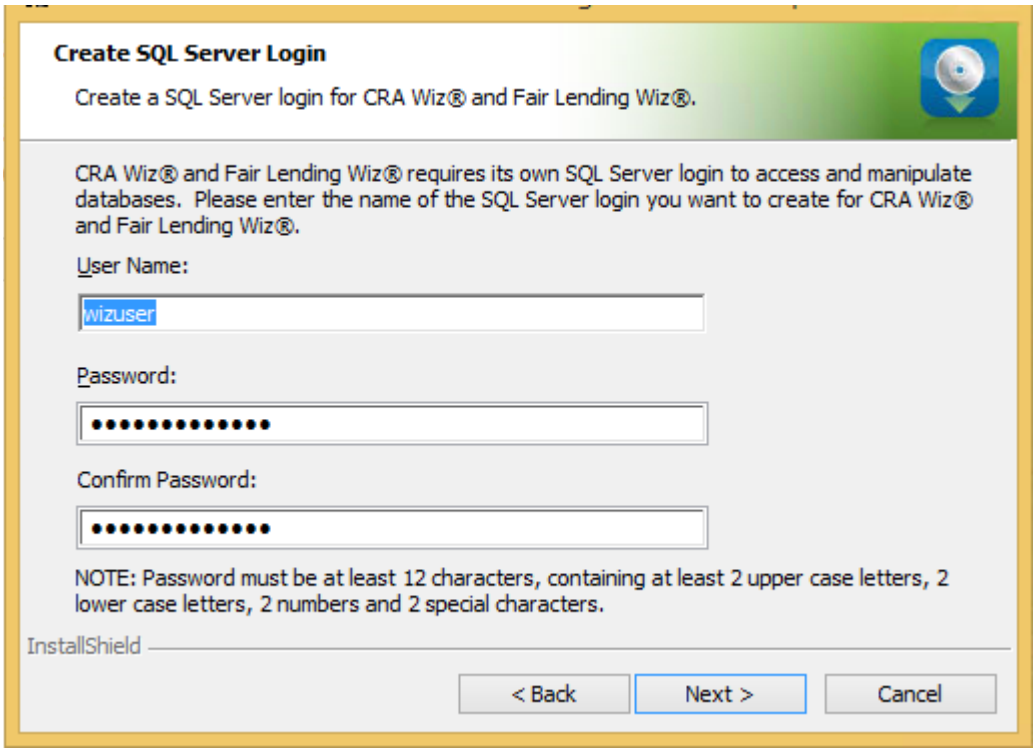
- Select the **Windows Authentication credentials of current user** option button if you log into SQL using this method. Windows Authentication indicates that you log into SQL using your Windows user account name and password.
- Select the **Server Authentication using the Login ID and password** option 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:



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

Note:
This screen displays only for first-time Server installations. We recommend utilizing the default wizuser user name and our default password, but they can be configured if you would like.

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.).

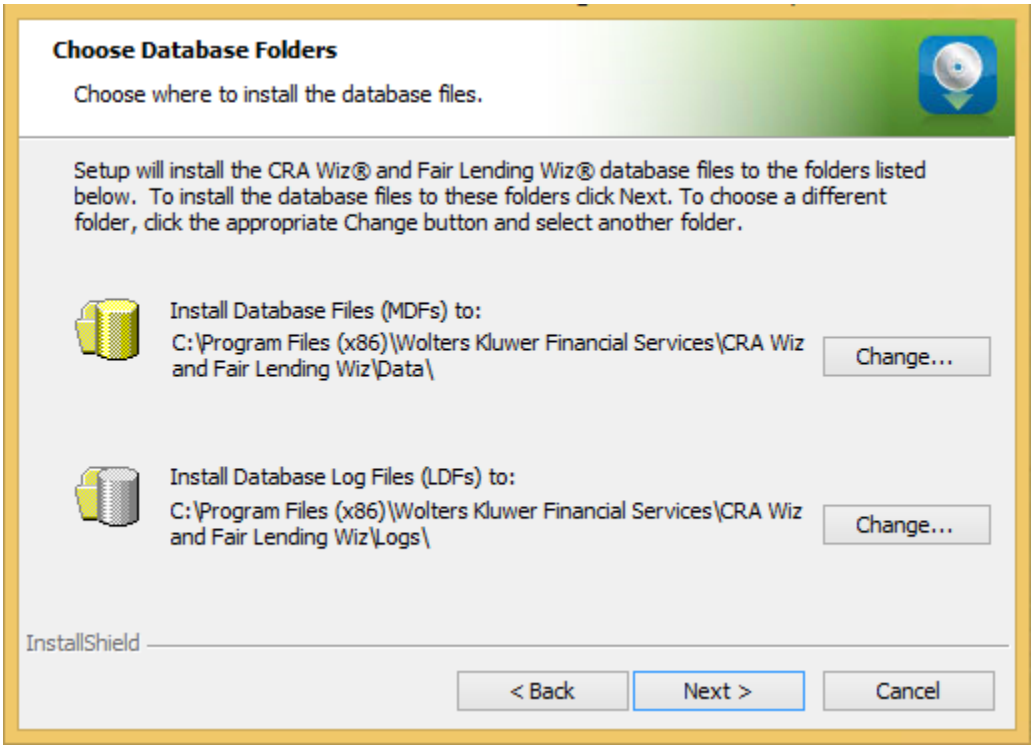
If your password does not mean any of these criteria, the installer displays an error message.

2. Click the **Next** button.

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

Choose Database Folders

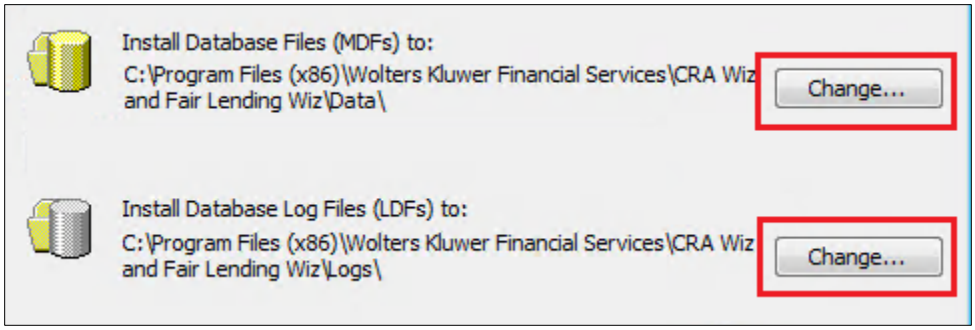
You use the **Choose Destination Folders** screen to select installation paths for data and log files:



Note:
This screen displays only for custom installations.

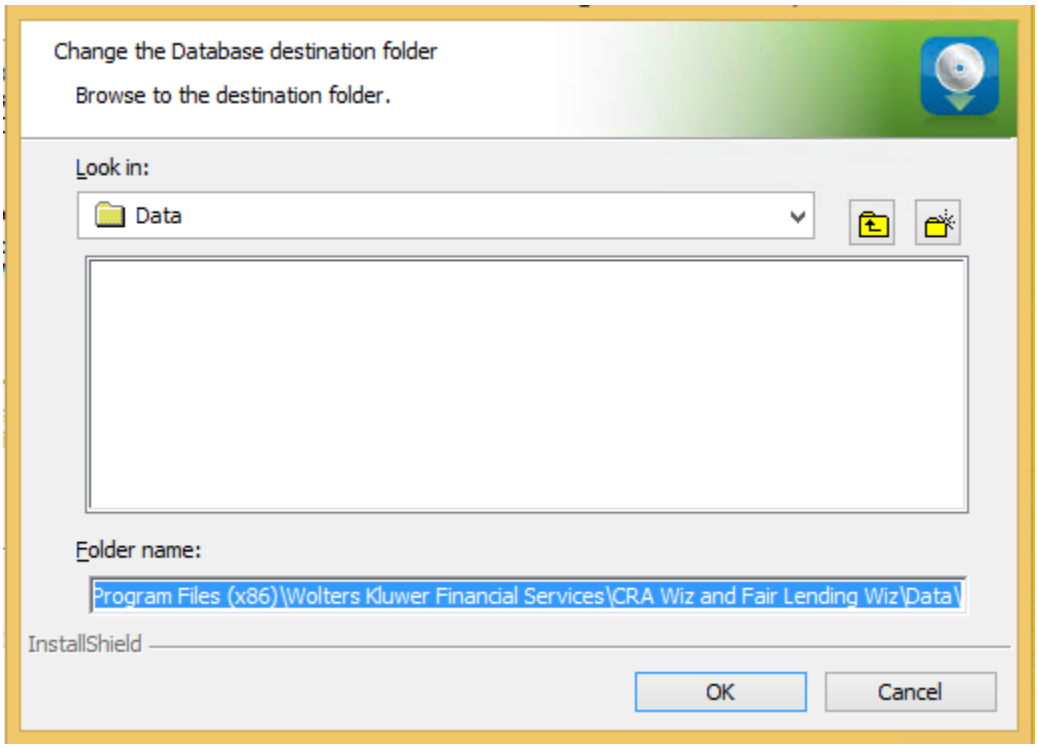
To select the destination folder where you want to install *Wiz* Server and/or log files, follow these steps:

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

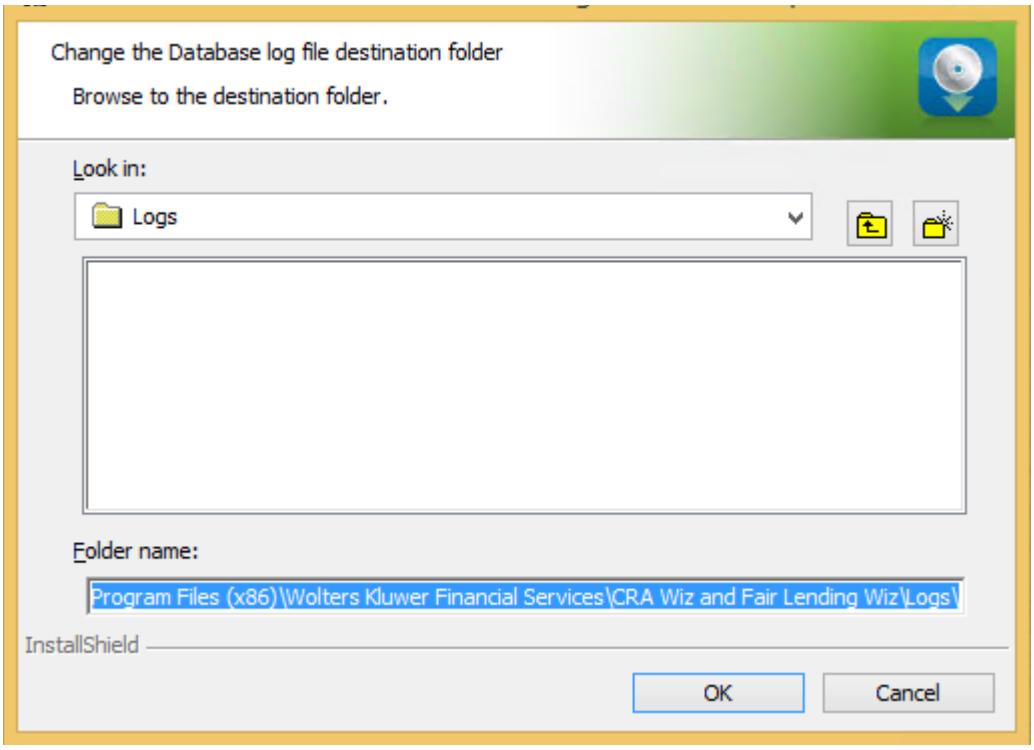


Depending on which path you select, the software displays one of the following:

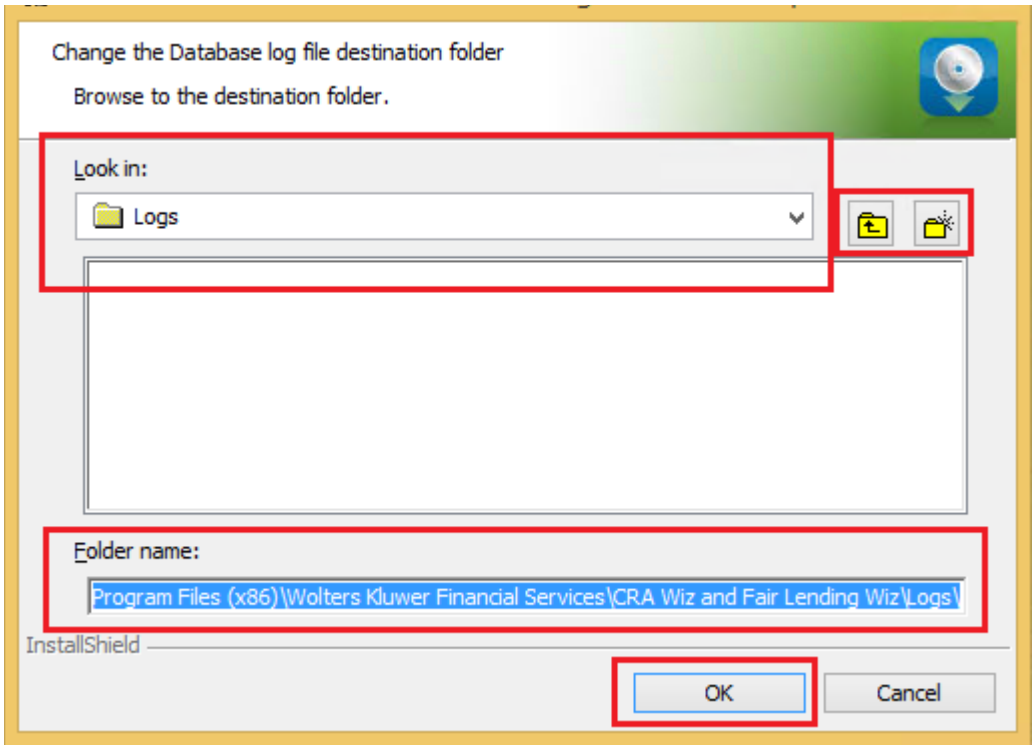
- **Choose Database destination folder** dialog box:



- **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.

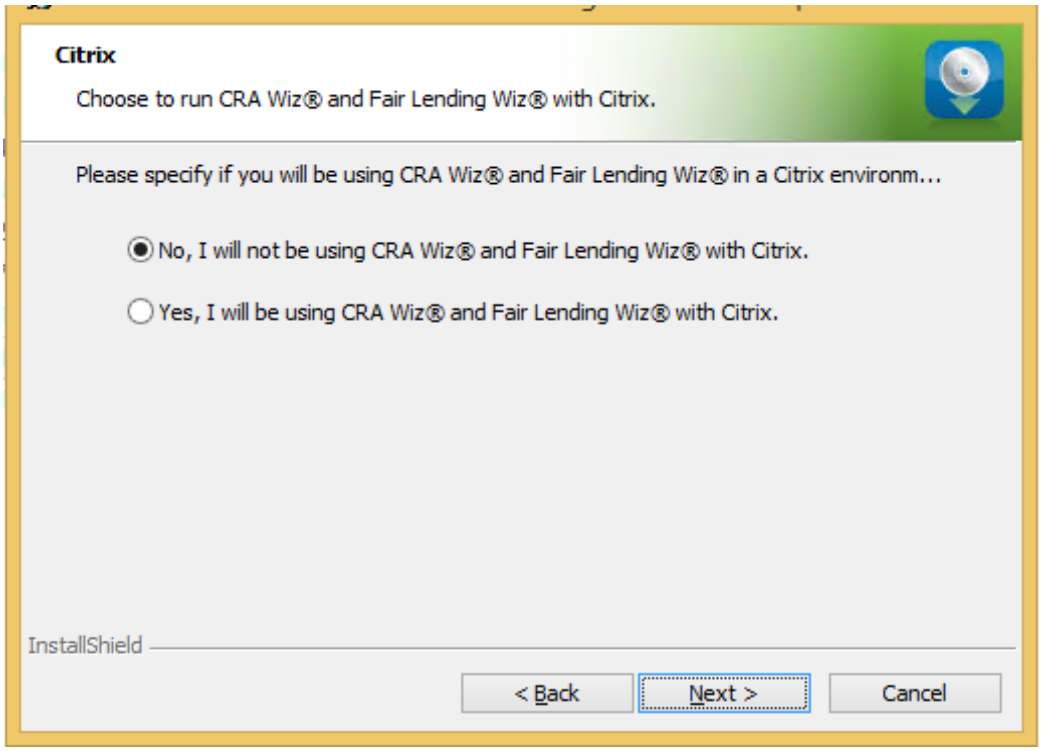
   The installer makes the Choose Database Folders screen the active screen.

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).

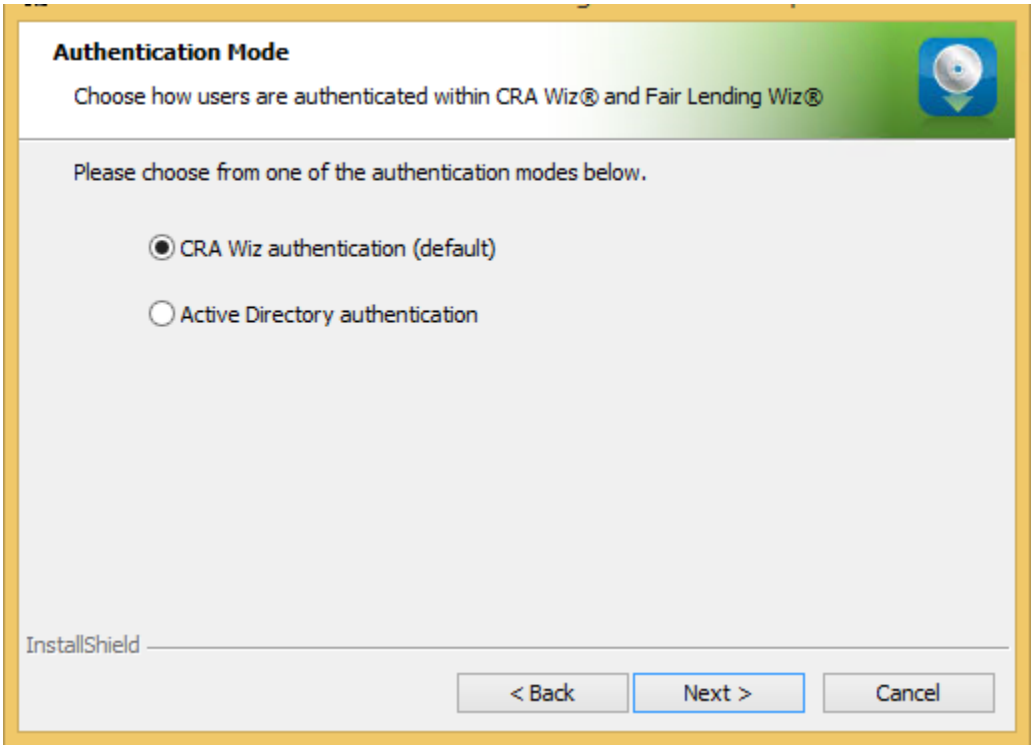
     Note:
     If you are not sure which type of computer network your institution uses, contact your network administrator.

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:

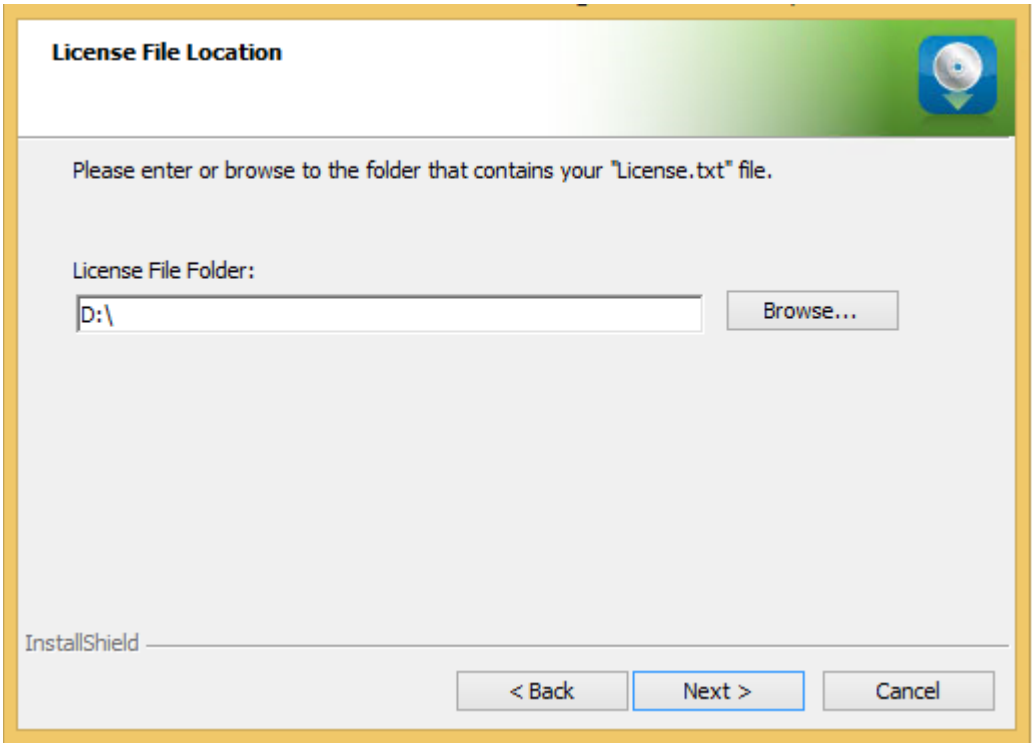
   - **CRA *Wiz* authentication (default)** - Select if you will log into the program using a *Wiz* user account and password. This is the default option.

   - **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.

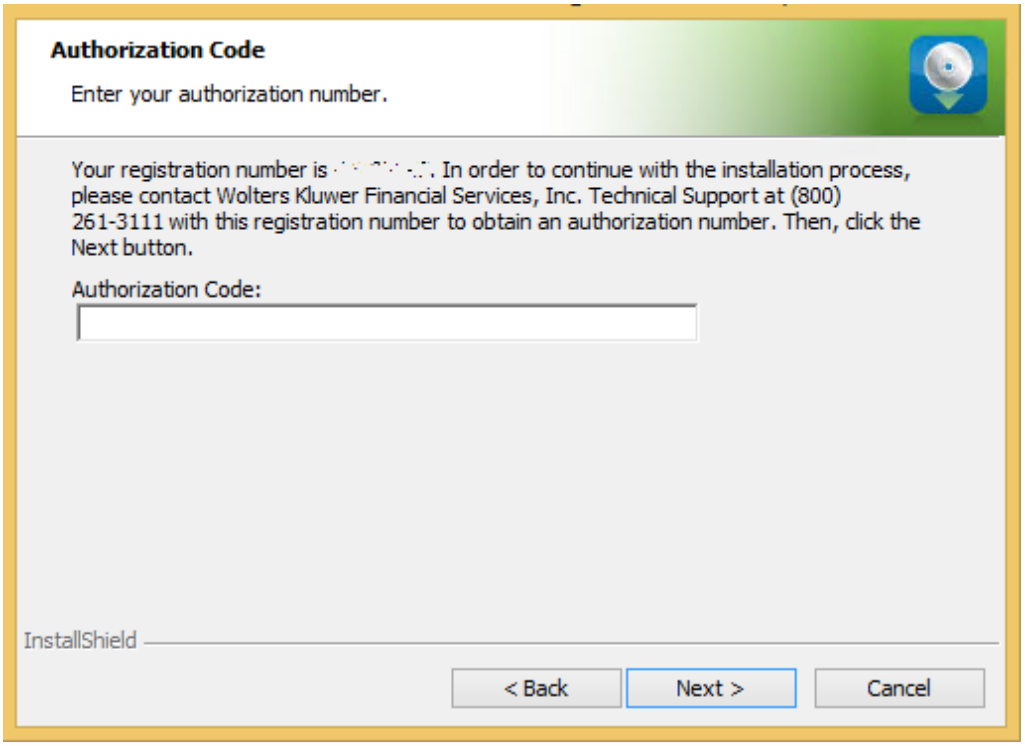
Note:
If you do not have a license file, please contact your Wolters Kluwer **Account Executive**.

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

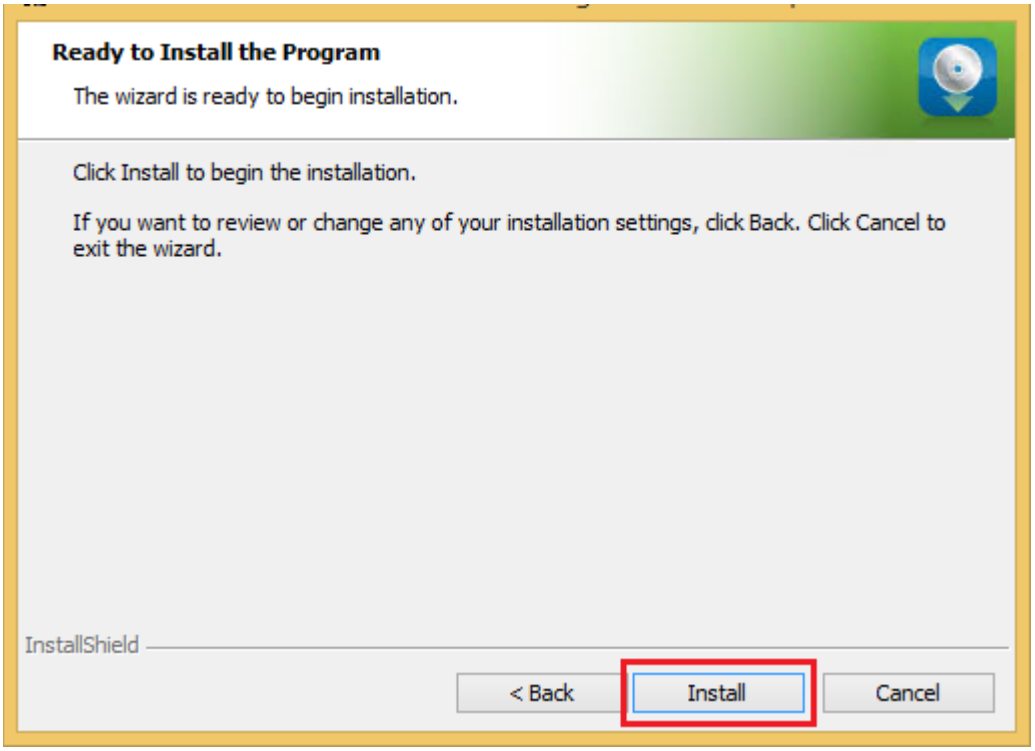
   The phone number is **(800) 261-3111**. When prompted, select **option 1** then **option 1**. The email address is CRAWizSupport@wolterskluwer.com.

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

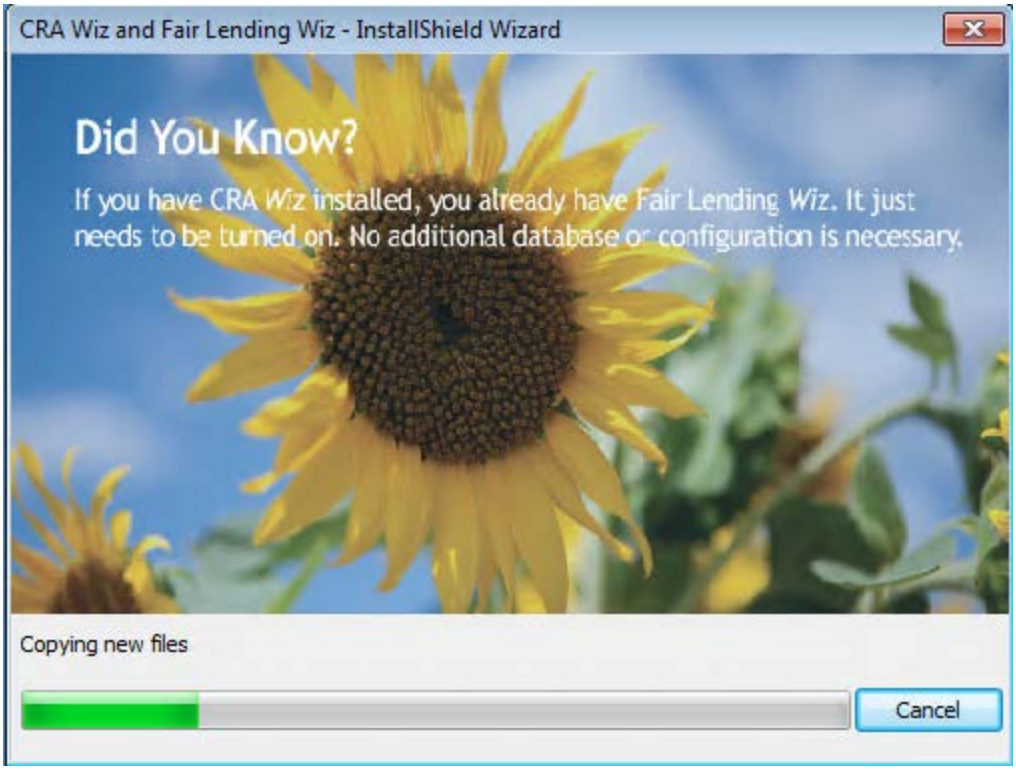
   The software displays the **Ready to Install the Program** screen.

Ready to Install the Program Screen

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



The installer installs the software:

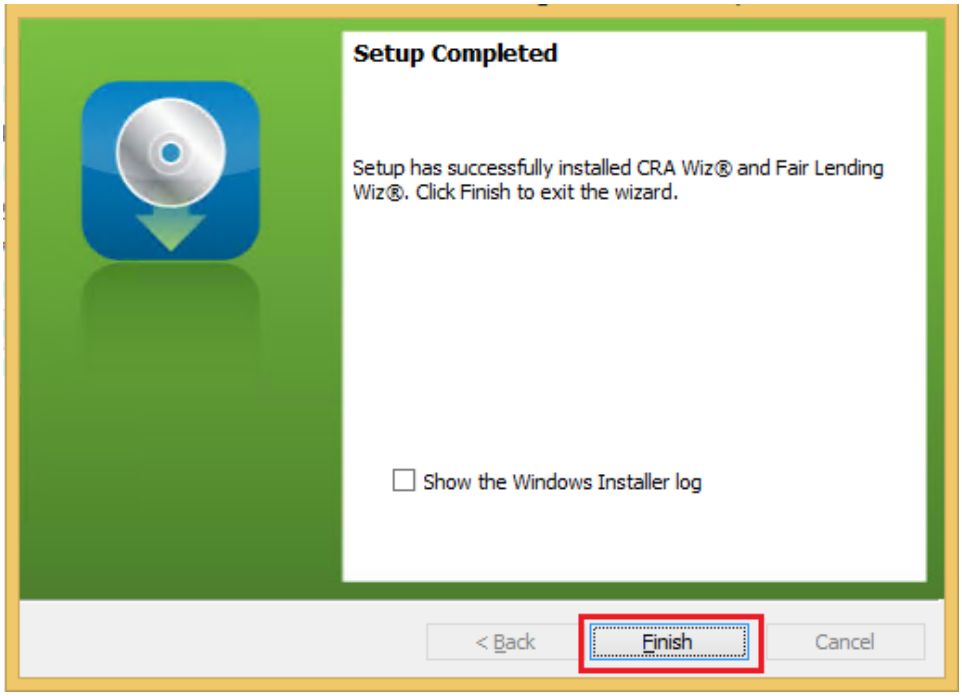


Note:
During installation the software displays a progress bar at the bottom of the installer window.

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:

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 recommends restarting the server 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

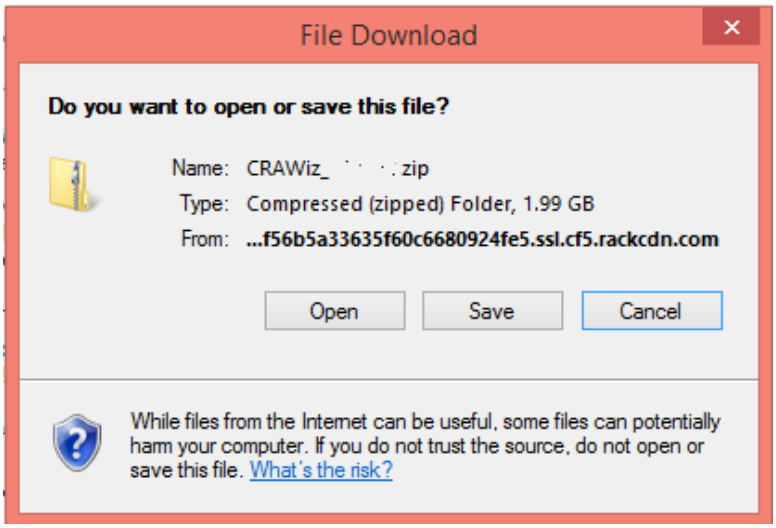
Follow these instructions if you want to install the CRA *Wiz* and Fair Lending *Wiz* **Client** software on a target computer. With *Wiz* Client installed, the target computer can connect to and work with databases located on a networked computer running *Wiz* Server.

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:

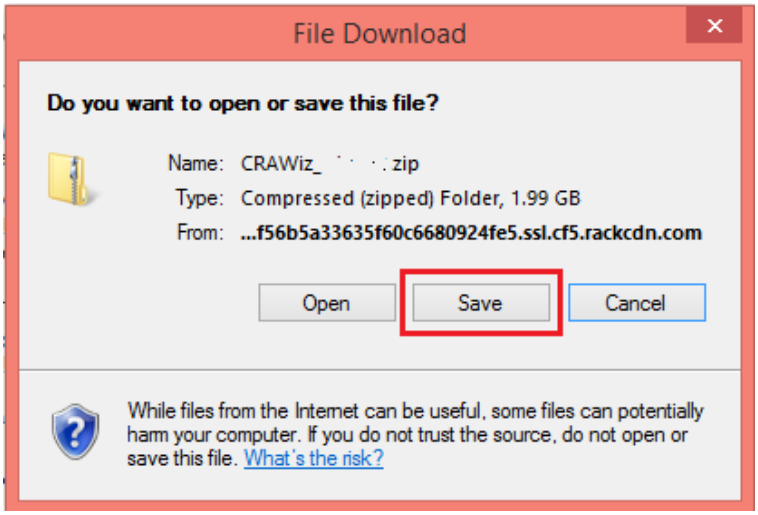
1. In the **Wiz Web Center**, click the **Installation Package** link.

   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.

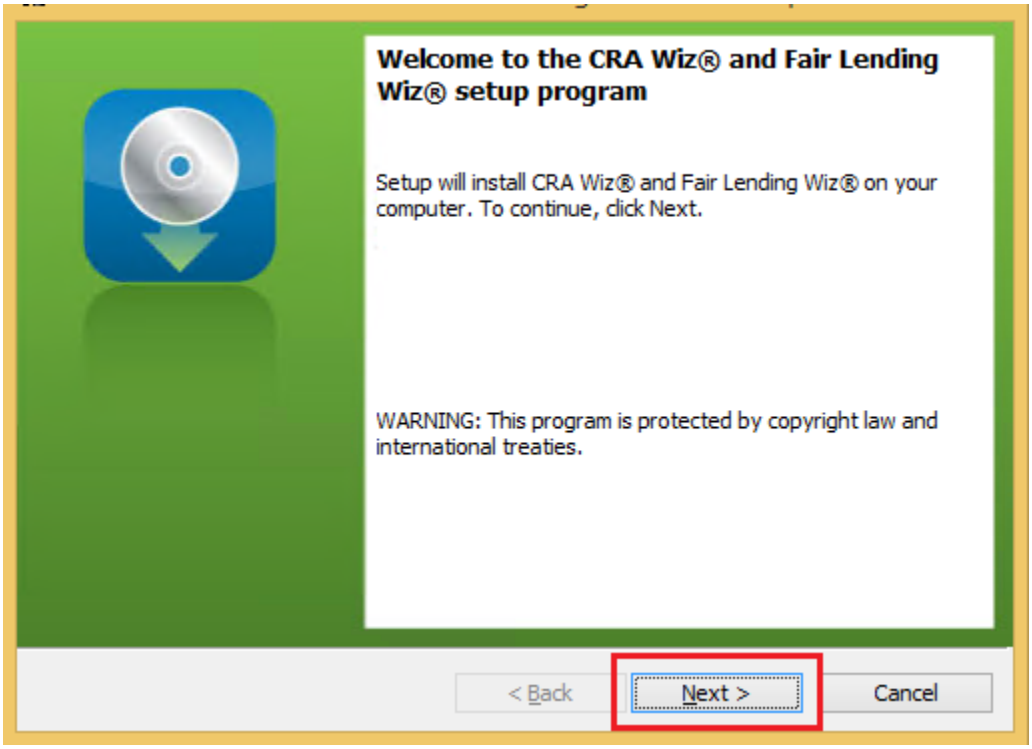
6. Right-click the **Setup.exe** file.

   The software displays a contextual menu.

7. Select **Run as Administrator**.

   The installer displays the **Welcome** screen.

Welcome Screen

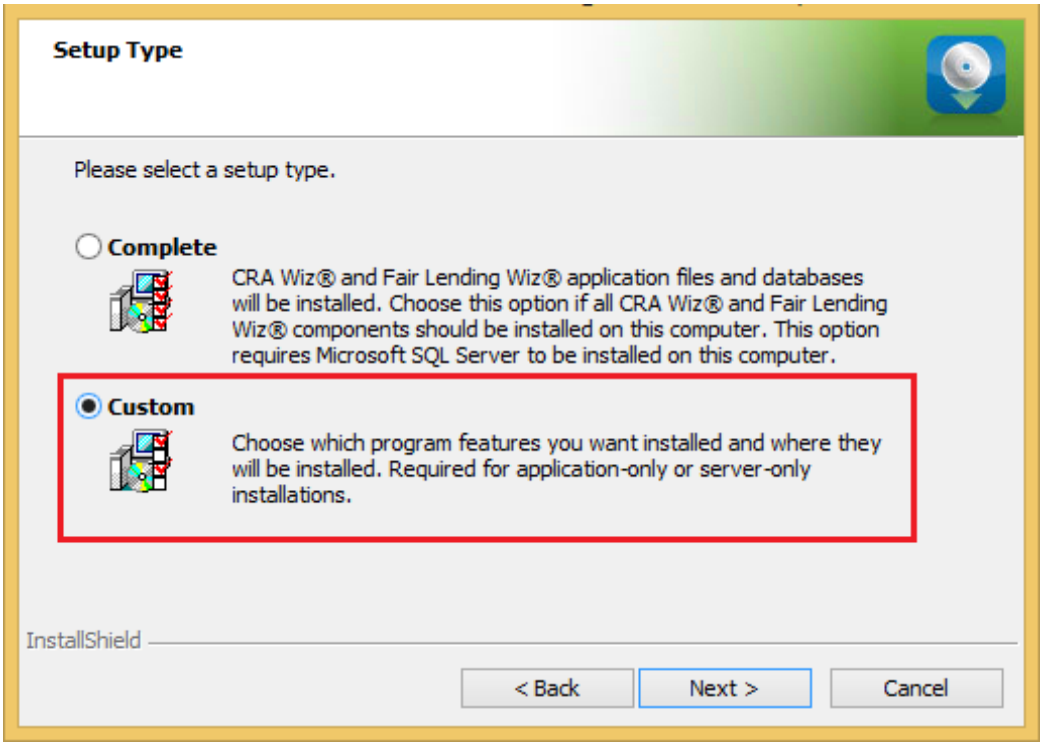


Click the **Next** button.

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

Setup Type Screen

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

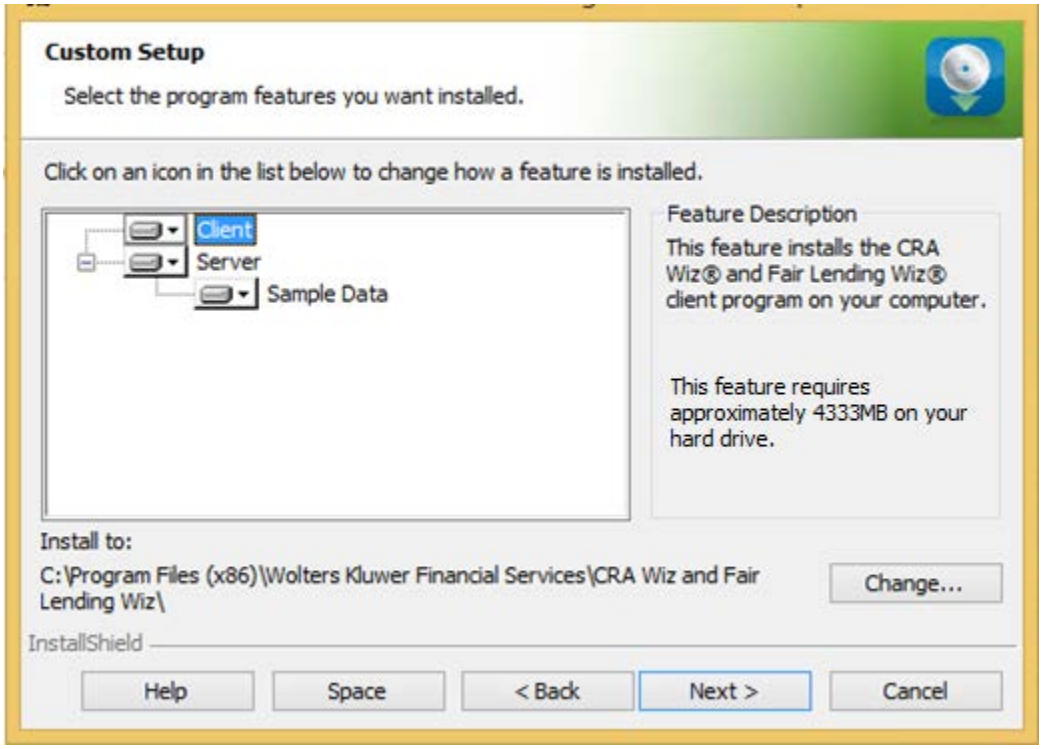


1. Select the **Custom** option.
2. Click the **Next** button.

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

Custom Setup Screen

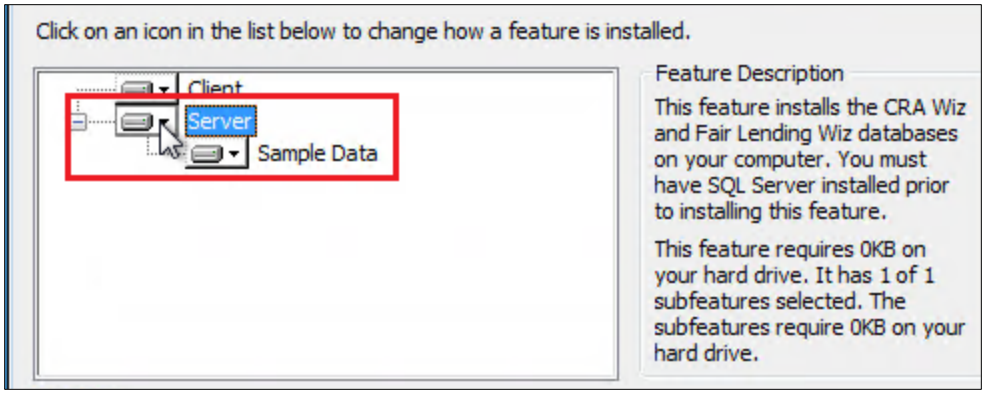
You use the **Custm Setup** screen to select Client components to install:



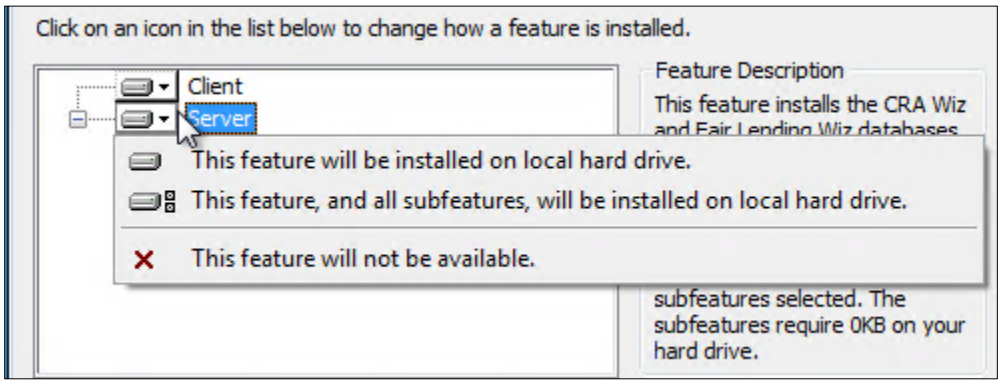
Note:
The installer displays this screen only if you selected the **Custom** option in the **Setup Type** screen.

To select components, follow these steps:

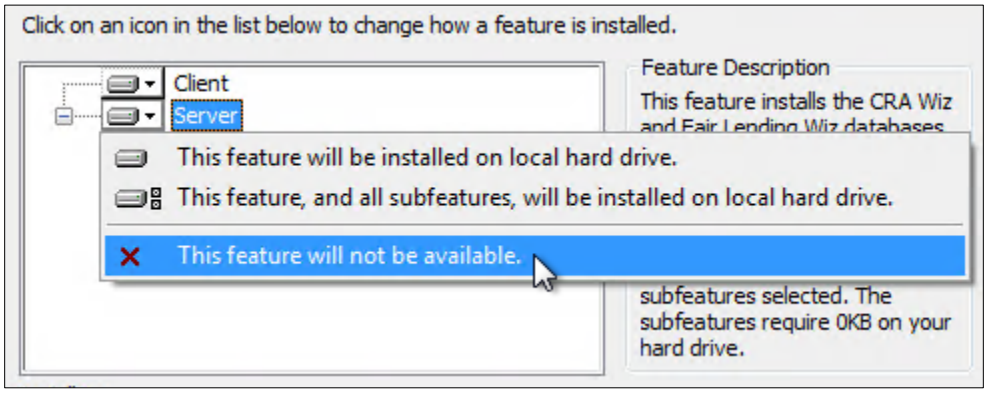
1. In the components list window, select the **Server** drop-down menu:



The software displays a contextual menu:

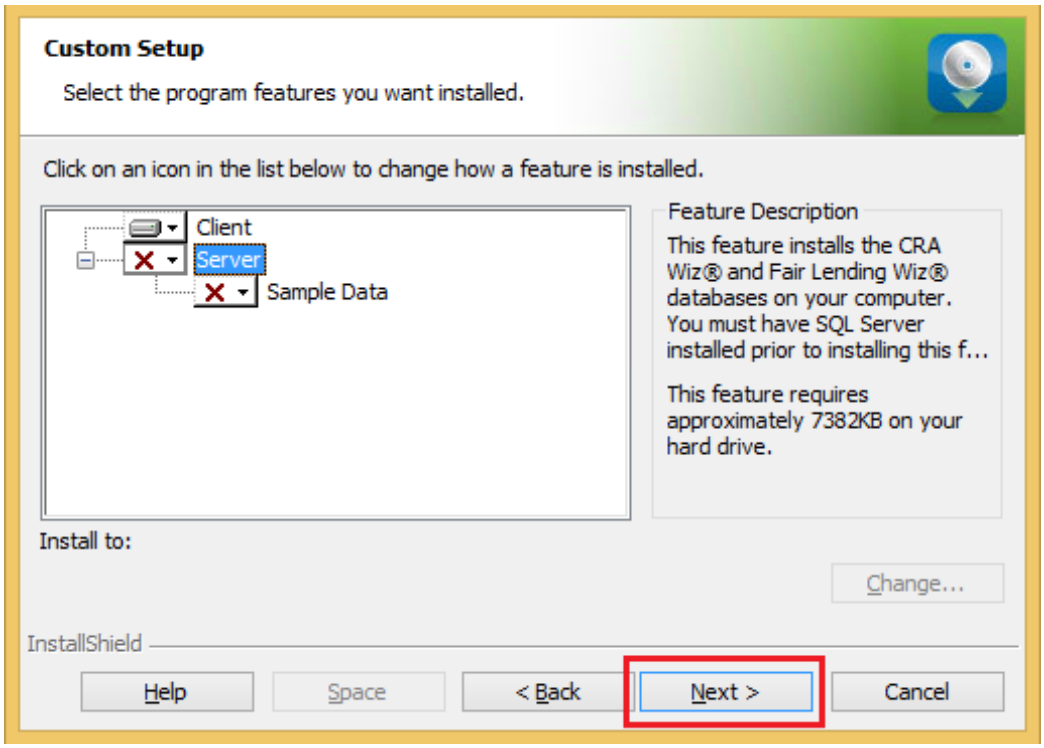


2. Select **This feature will not be available**:



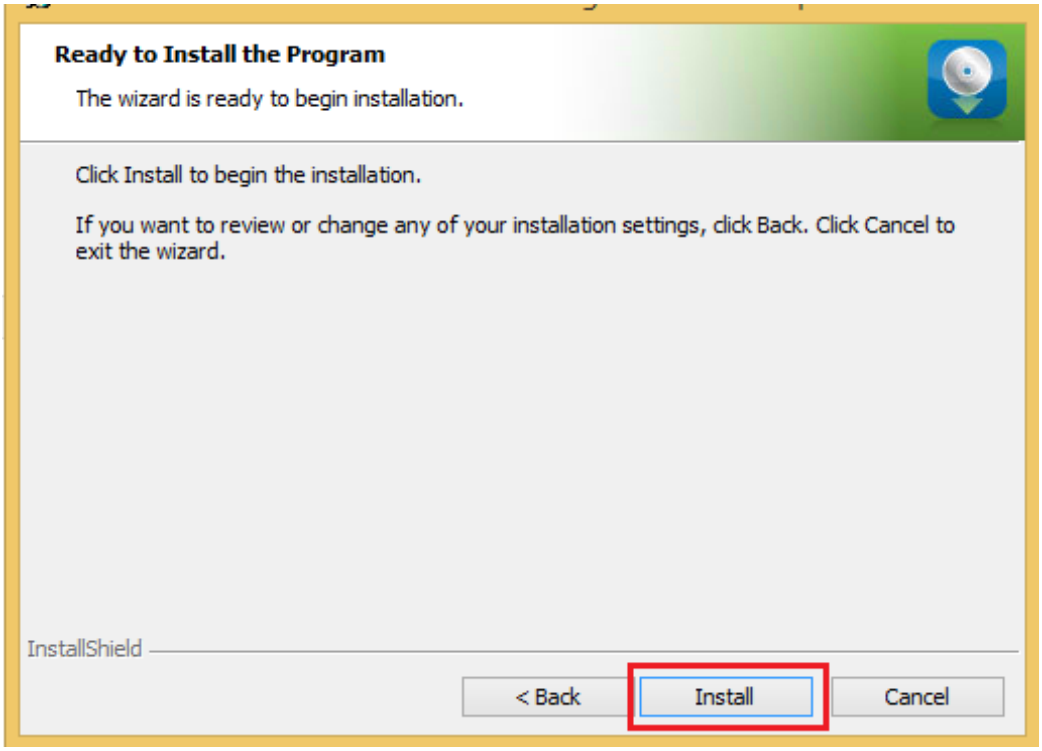
Note:
If you do not select at least one component, the software displays an error message.

3. Click the **Next** button:



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

Ready to Install the Program Screen



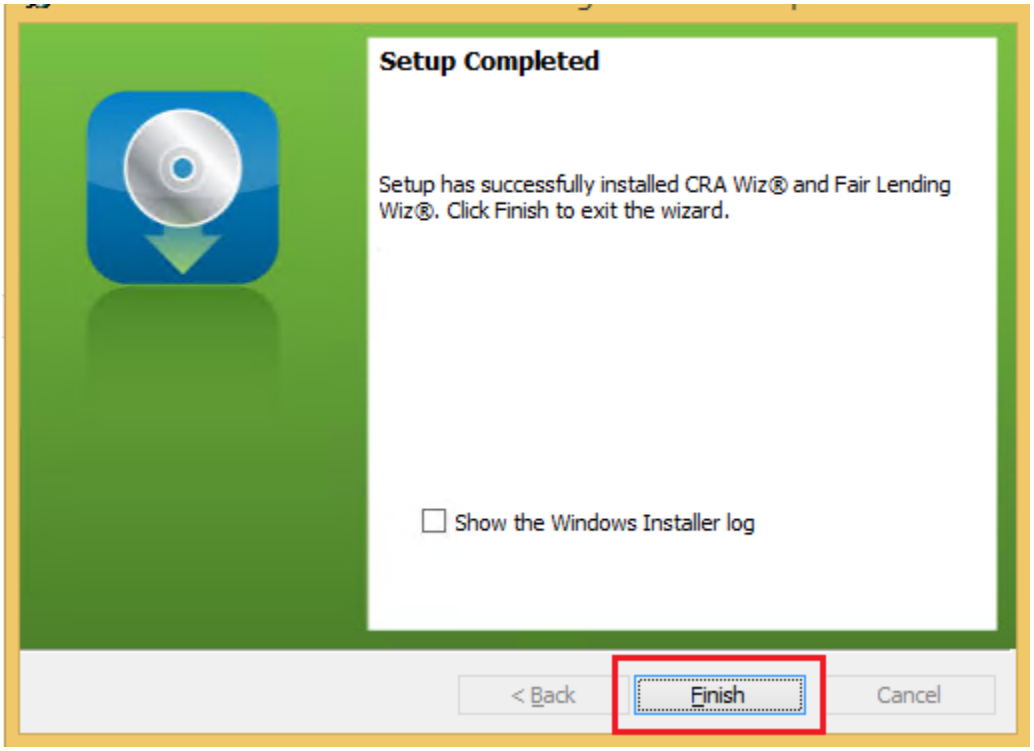
To install *Wiz* Client, click the **Install** button.

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.

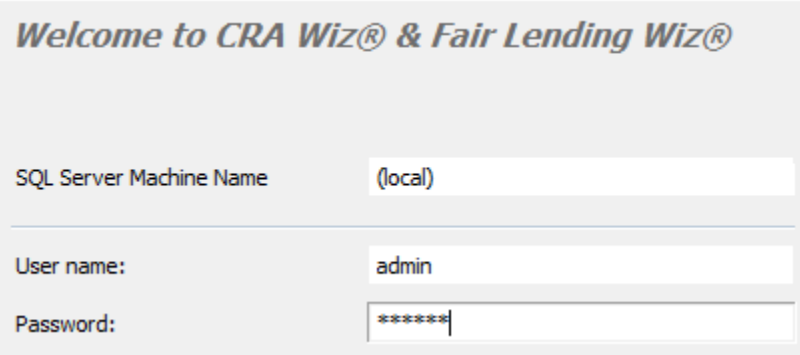
Important!
Wolters Kluwer recommends restarting your computer after installation is complete.

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:

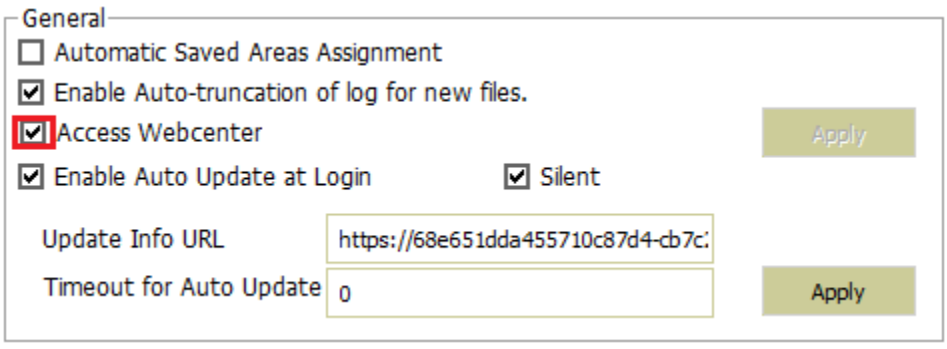
1. In the **SQL Server Machine Name** field, input the SQL Server where CRA Wiz is installed.
2. Input **Admin** as the Username and **crawiz** as the password.



3. Click the **OK** button.

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

4. Once at the Main screen click on **System Maintenance** on the left under the Main tab then go to **Settings** – **General** check the box next to **Access Webcenter** then click **Apply**. Enabling this option will allow for the Wiz Webcenter page to display each time the user logs into the application.



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