Wolters Kluwer

Installation Instructions
October 2023

Front-End Build: 77.0.197
Back-end Build: 77.0.164

Financial & Corporate Compliance

CRA *Wiz* and Fair Lending *Wiz*:

7.7 UPDATE Installation Instructions

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1 Overview

The **CRA *Wiz* and Fair Lending *Wiz* 7.7 Update** contains 2024 Activity Year support, 2024 Submission Support, several CRA Table Fixes, Bug Fixes, technical updates, and 2010 Proxy availability while in a 2020 boundary.

Refer to the CRA *Wiz* and Fair Lending *Wiz* 7.7 **Release Notes** for detailed information regarding all of the included updates:

LINK

For information about the **previous release**, **which is included in the CRA Wiz and Fair Lending Wiz 7.7 Update**, please refer to the **CRA *Wiz* and Fair Lending *Wiz* 7.6 Event Scheduler and Filter Fix Release Notes**:

CRA Wiz 7.6 Event Scheduler and Filter Fix Release Notes

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

1.1 Who Should Install

All clients using CRA *Wiz* and Fair Lending *Wiz* for HMDA or CRA data submission are required to complete this update prior to submission.

1.2 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.

Important!

- **.NET Framework 3.5** is still needed for the **Map** module (on Client machine only).

- CRA *Wiz* and Fair Lending *Wiz* 7.7 requires that **.Net 4.8. should be installed on Client and Server.** If you do not have .Net 4.8 installed, you can download **.Net 4.8** using the following link:

  https://dotnet.microsoft.com/en-us/download/dotnet-framework/net48

- If the CRA Wiz and Fair Lending Wiz 7.7 installer displays the following warning message towards the end of installation process:

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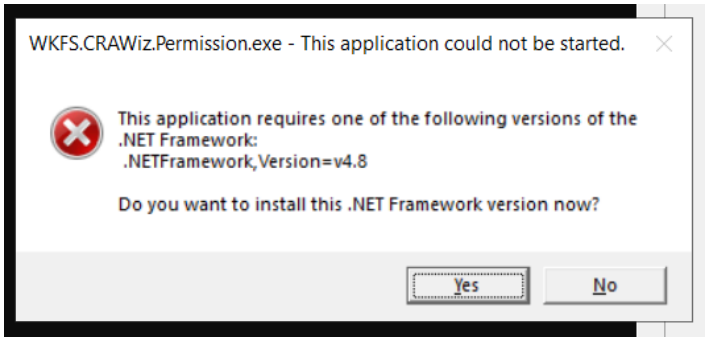

- Click the **Yes** button to download and install **.Net 4.8.1**.
- If Windows displays a warning that your computer does not support .Net 4.8.1During the CRA *Wiz* and Fair Lending *Wiz* program install, the installer checks for a **minimum supported SQL version**. The minimum supported SQL Version for CRA *Wiz* and Fair Lending *Wiz* 7.7 is **SQL Server 2016.**

1.3 Prerequisites

CRA *Wiz* and Fair Lending *Wiz* 7.7 update can be installed as an update with **any** version 7.6.0 xx or higher.
Previous required versions include:

- Version 7.6
- 7.6 Submission Update
- Event Scheduler Hotfix

1.4 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.

1.5 Required Free Disk Space

Client side – Approx. two (2) gigabytes (GB)
Server side – Approx. 18.3 gigabytes (GB)
Workstation Installation – Approx. 18.3 gigabytes (GB)

1.6 Approximate Install Time

Client side – Approx. 10 minutes
Server side – Approx. 40 minutes
Workstation Installation – Approx. 40 minutes

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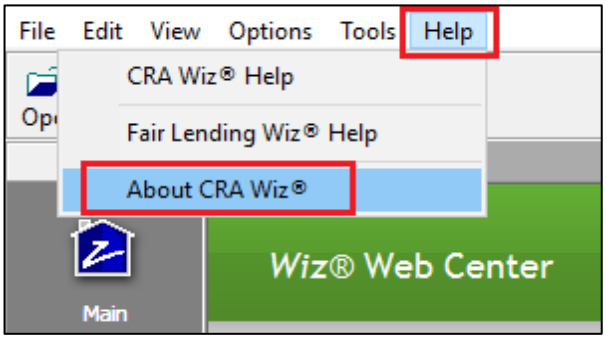
1.7 Confirming Installation

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.

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2 Installation

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

1. If you are a **Windows Geocoder** and/or **Premium Mapper** customer, **stop/cancel** one or more of the following services:
    - Batch Geo Service
    - WKFS Web Map Upload Service

    Note: You can restart these services after installation is complete and you have restarted your computer.

2. 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
    - All Wiz_##### databases

    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 BACKUP 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.

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

    The software displays a contextual menu.

5. Select **Run as Administrator**.

    The installer displays the **Welcome** screen.

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

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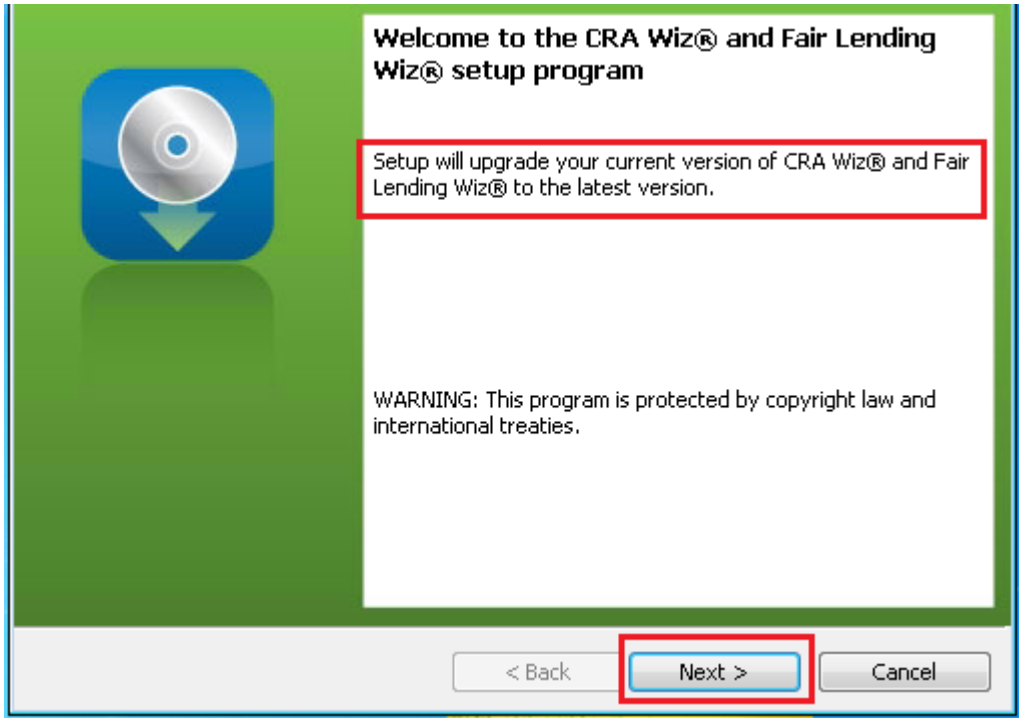
7. Click the **OK** button.

   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**.

8. Click the **Next** button. The software displays the **SQL Server Name** screen:

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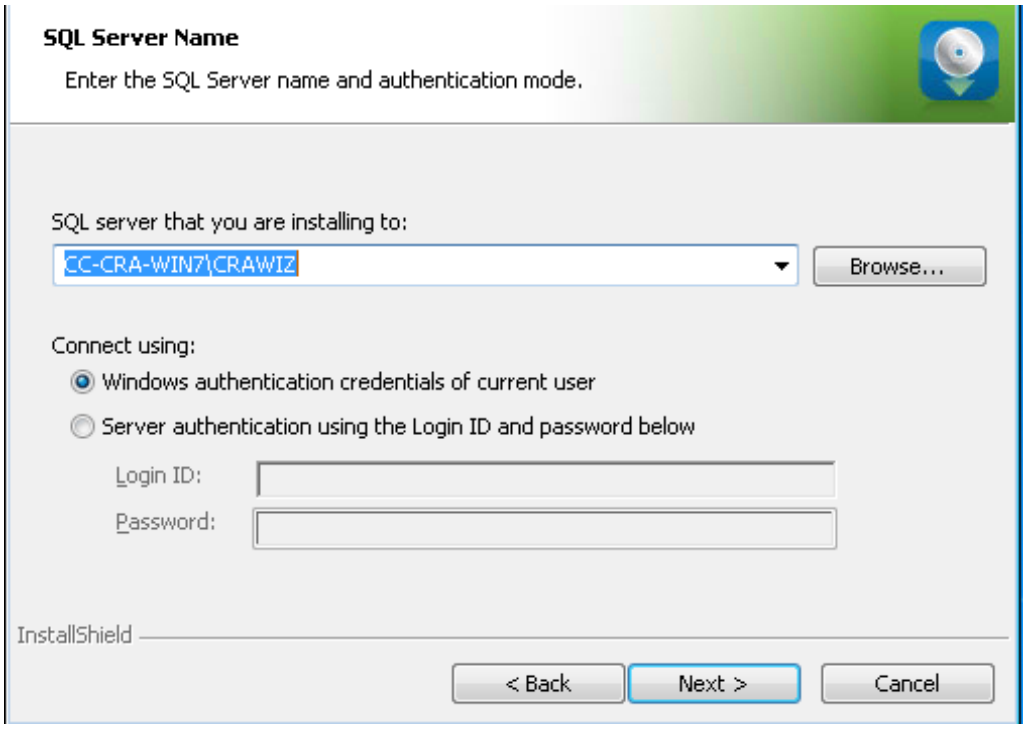
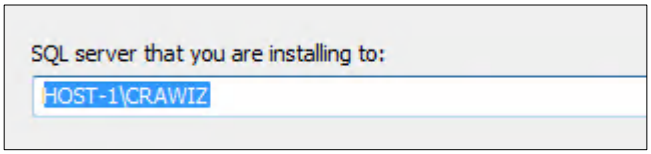
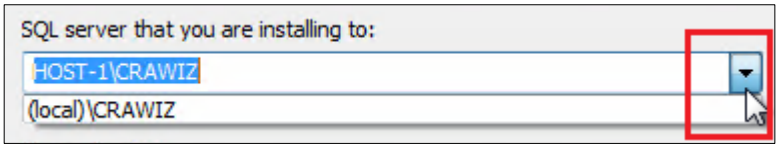


Note:
The software displays the SQL Server Login screen only if the computer on which you are installing the update is running **SQL Server**. If the installer does not detect SQL Server on your computer, the installer displays the **Ready to Install the Program** screen**. Skip to Step 12**.

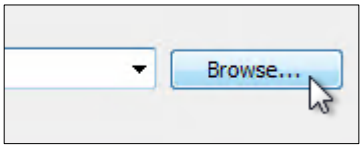
9. In the **SQL server that you are installing to:** field, do one of the following:
   - Enter the name of the SQL Server to which you are installing the data:



   - 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:



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Then select the database server from the resultant dialog box:

10. 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.

11. 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.

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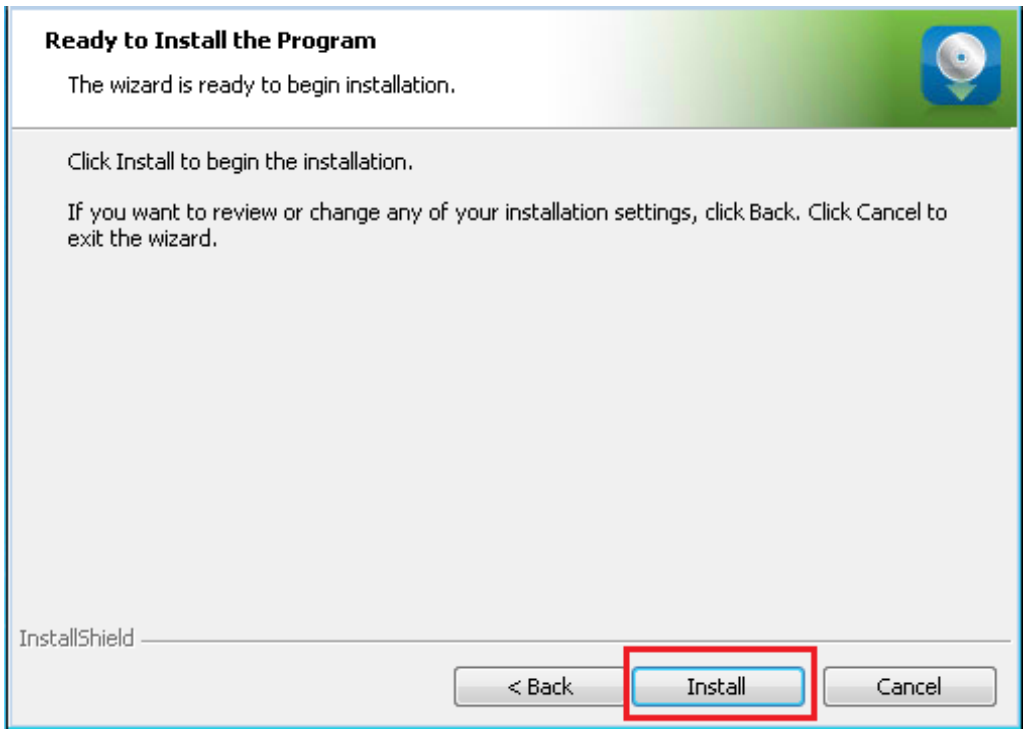
Do one of the following:

- Click the **Yes** button to **proceed** with installation.
- Click the **No** button to **cancel** the installation.

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



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

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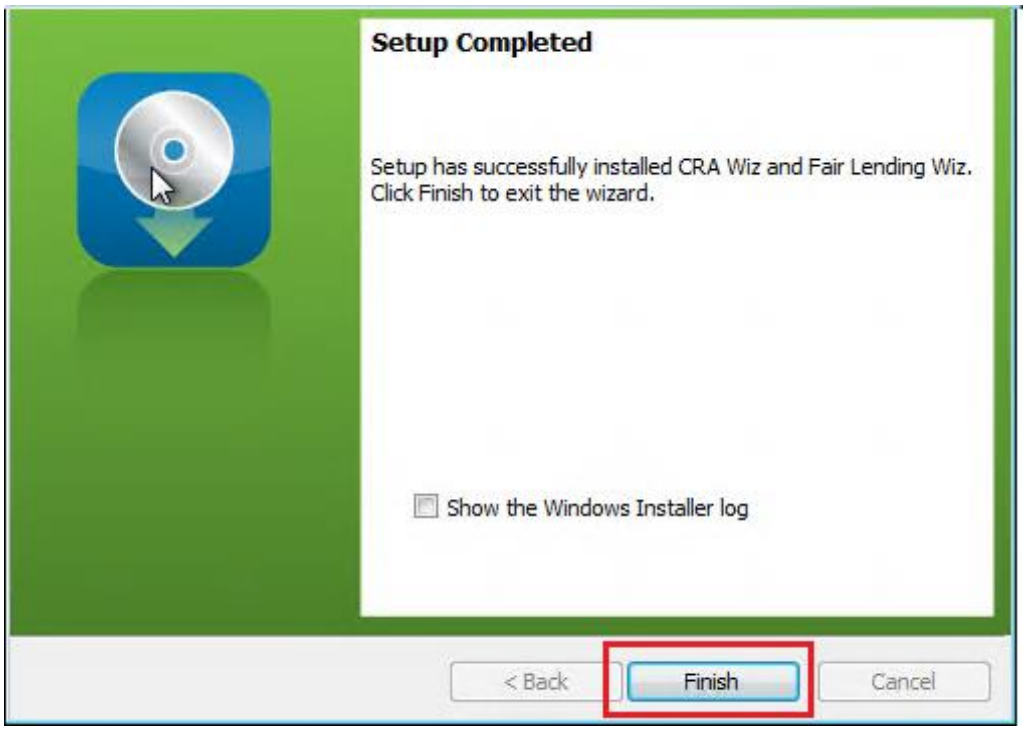
Note:
During installation the software displays a progress bar at the bottom of the installer window.
When installation is complete, the installer displays the **Update Complete** screen:



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

13. Restart your computer after installation is complete.

14. After restart, do the following:

    If in **Step 1**, you stopped the **Windows Geocoder Service** and/or **Web Map Upload Service**, and have Windows Services configured to restart **manually**, restart these services.

    Installation is complete.

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3 Appendix A: Technical Reference

- ✓ Wolters Kluwer currently supports your CRA *Wiz* and Fair Lending *Wiz* software using Microsoft SQL Server 2016 and 2019 (Standard, Enterprise, and Express editions), with the SQL Server upgrade patches supported by Microsoft.

- ✓ CRA *Wiz* and Fair Lending *Wiz* 7.7 update requires CRA *Wiz* and Fair Lending *Wiz* 7.7 (Builds starting with 76.0.xx) or later; Microsoft Windows Server 2016 and 2019; or Microsoft Windows 10.

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