CRA *Wiz* and Fair Lending *Wiz* 7.0: 2014 Peer Branch and Deposit Data

Release Notes and Installation Instructions

Release Date: May 2015

Wolters Kluwer
Financial Services

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Overview

This update allows users to run reports and create maps using branch and deposit data from their peers.

Data Source

FDIC

Who Should Install

Any client licensed for Branch and Deposit Data should install this update. To determine if you are licensed for Branch and Deposit Data, go to the **System Maintenance** screen and select **License and Access Management**.

Prerequisites

CRA *Wiz* and Fair Lending *Wiz* 7.0 is required to install this update. To check your CRA *Wiz* and Fair Lending *Wiz* version, go to the program menu bar and select **Help** > **About CRA Wiz**. Build numbers starting with "70" are acceptable.

Required permissions

This update is installed as a single database, so both Windows read/write permissions and SQL Server database creation permissions are required. Wolters Kluwer Financial Services recommends that the user running the install have both a Windows admin and SQL Server admin login credentials.

Required free space

Approximately 1 GB

Approx. install time

10 – 15 minutes

Confirming Installation

Once the installation is complete, you can verify the installation by selecting the **File Management** option in the CRA *Wiz* and Fair Lending *Wiz* sidebar. You will also need to set Census boundaries to 2010, located in the **Options** menu bar item. The software will then display a file named **2014 Peer Deposit Data** in the **Branch and Deposit Data** folder of the **File Management** screen.

Note: The CRA *Wiz* and Fair Lending *Wiz* build number (as found in **Help** > **About CRA Wiz**) is not updated by the 2014 Peer Branch and Deposit Data installer.

Installation Instructions

To install 2014 Peer Branch and Deposit Data, follow these steps:

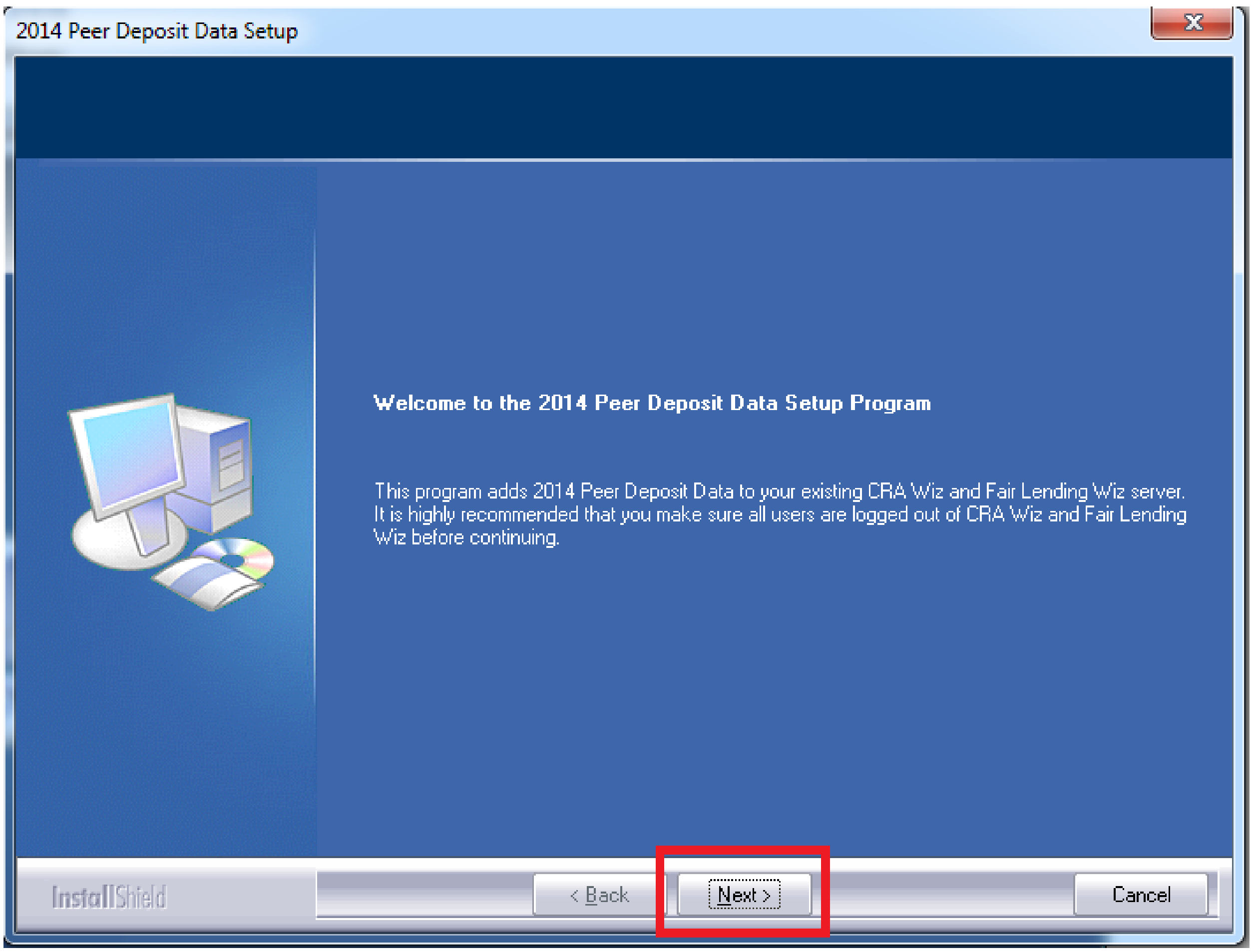
1. After downloading the update, locate and double-click the **2014PeerDepositData** installation file.

The installer displays the **Welcome** screen.

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

Welcome Screen

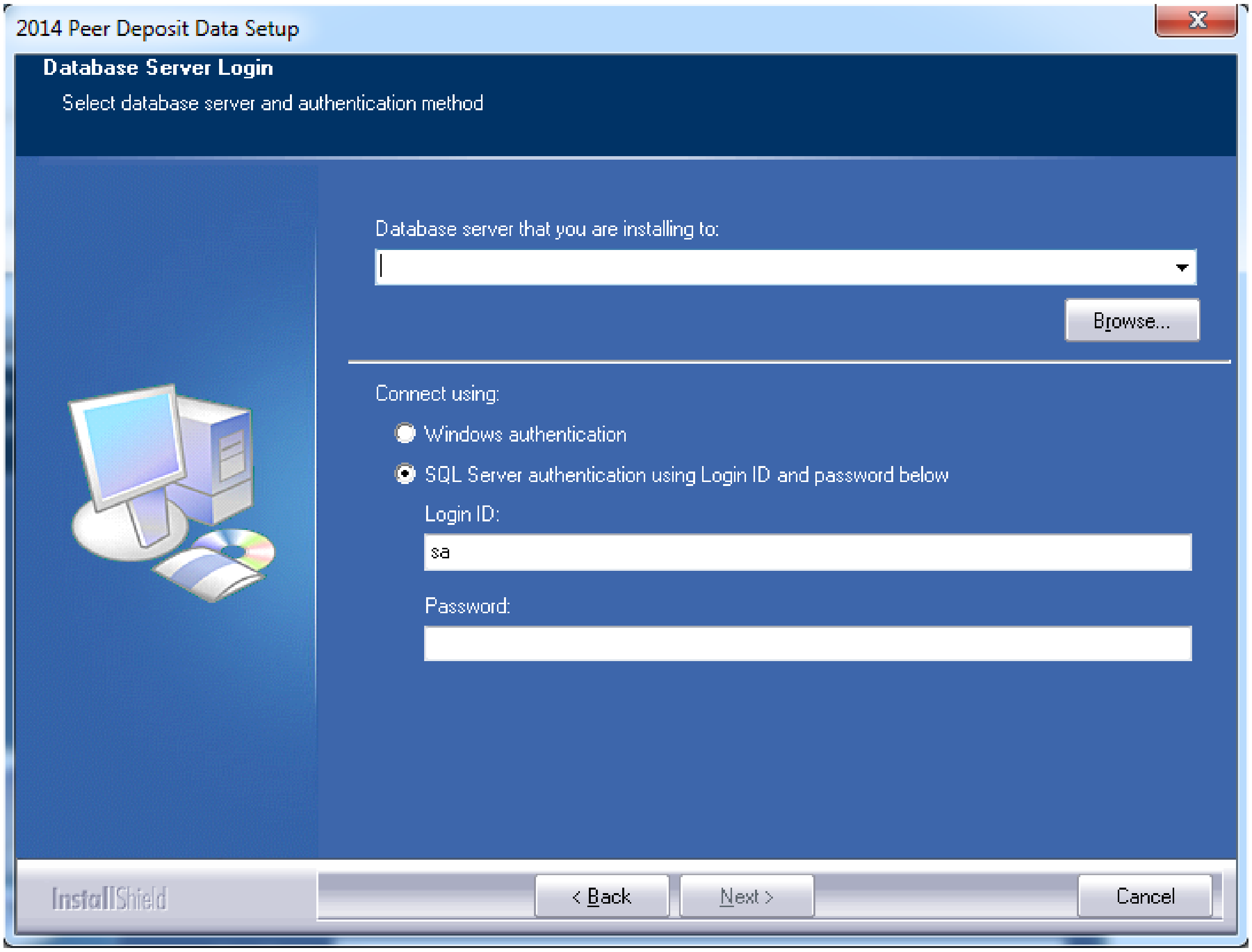
Click the **Next** button:



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

SQL Server Login Screen

Use this screen to enter the name of the **SQL Server** and to configure authentication options:



To configure login options, follow these steps:

1. In the **SQL Server** field, enter the name of the SQL Server to which you are installing the data.

2. Choose one of the following authentication options:

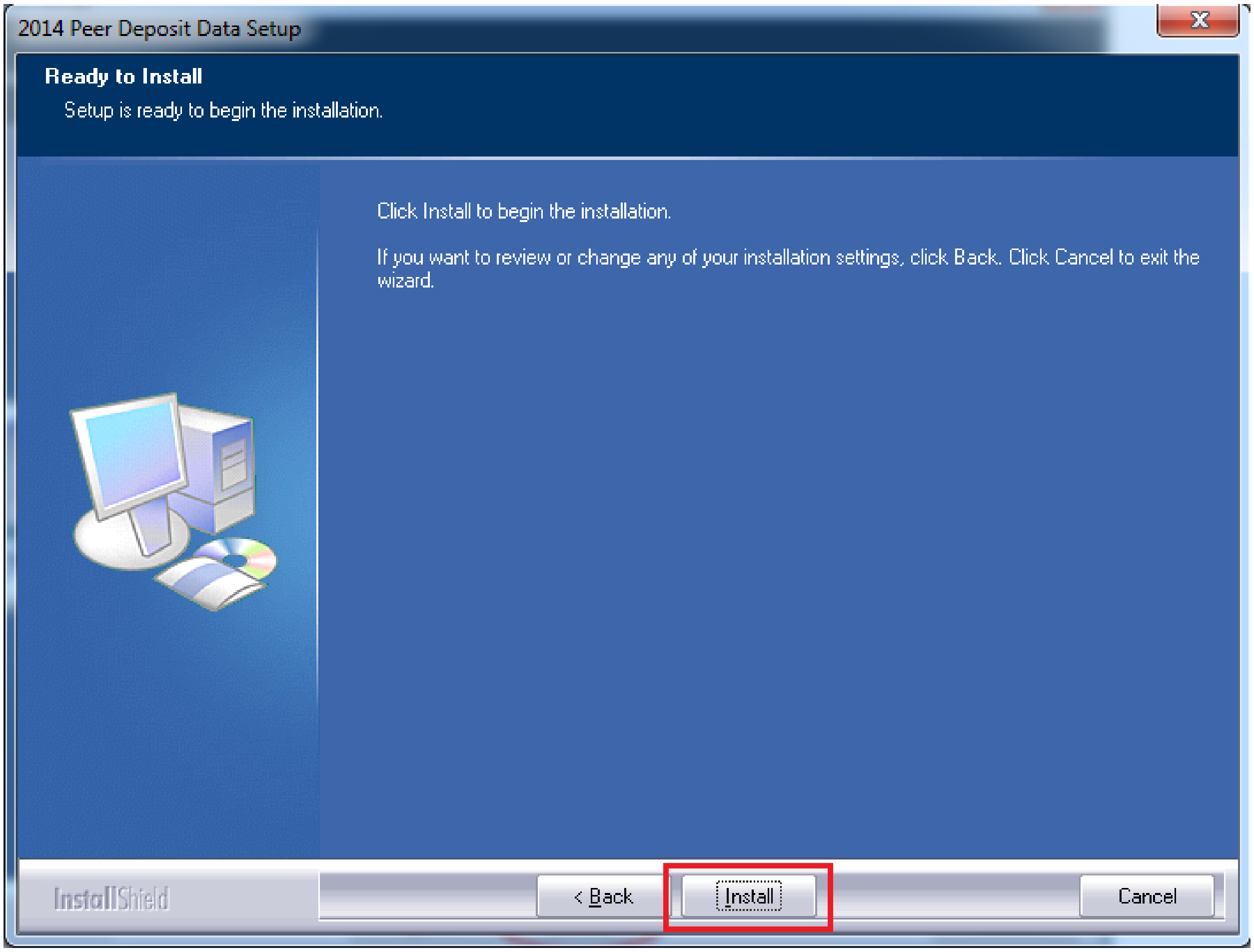
- Use Windows Authentication
- Use SQL Server Authentication - If you select this option, you must also enter your SQL Server account **User Name** and **Password** in the **User Name** and **Password** fields.

3. Click the **Next** button.

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

Ready to Install Screen

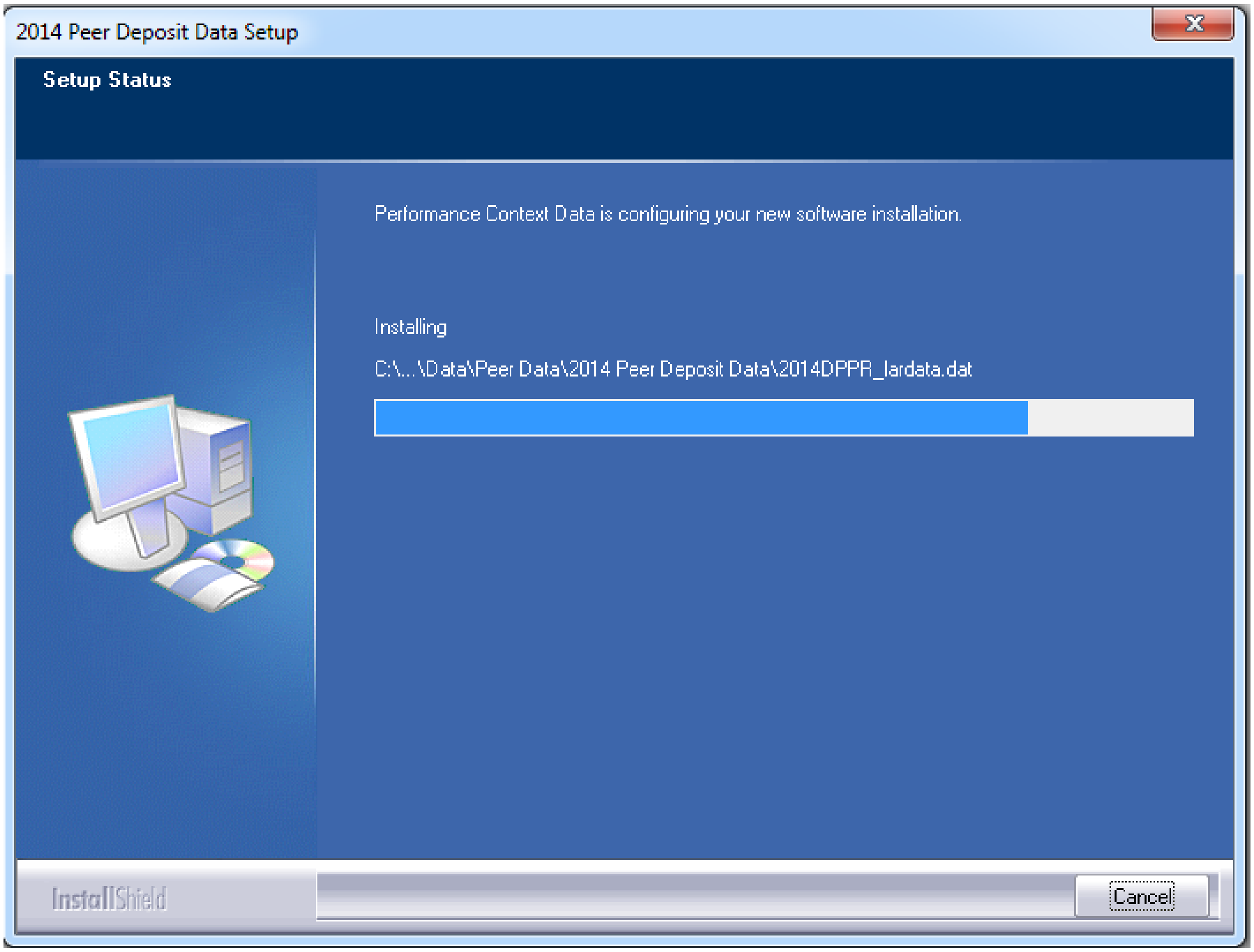
To begin installing the data sets, click the **Install** button:



The installer displays the **Setup Status** screen.

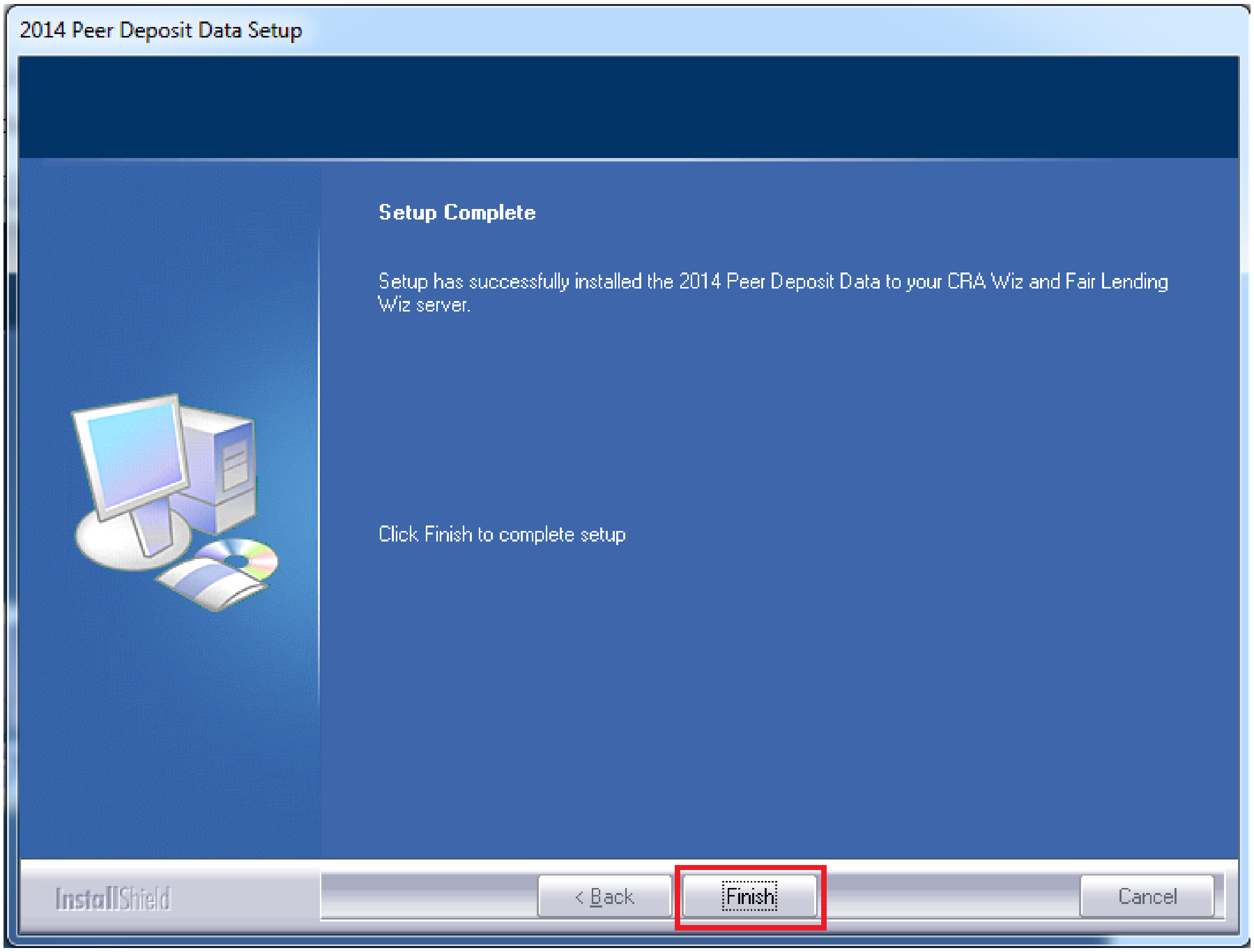
Setup Status Screen

The **Setup Status** screen displays a progress bar that reports the progress of the installation:



Setup Complete Screen

Click the **Finish** button:



Installation is complete.

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