



Consumer Compliance Solutions

# CRA *Wiz* and Fair Lending *Wiz* 7.1: 2015 Peer Branch and Deposit Data

Release Notes and Installation Instructions

Release Date: May 2016

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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 7.1 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 "71" 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

Less than 1 GB

### Approx. install time

2-5 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 **2015 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 2015 Peer Branch and Deposit Data installer.

## Installation Instructions

To install 2015 Peer Branch and Deposit Data, follow these steps:

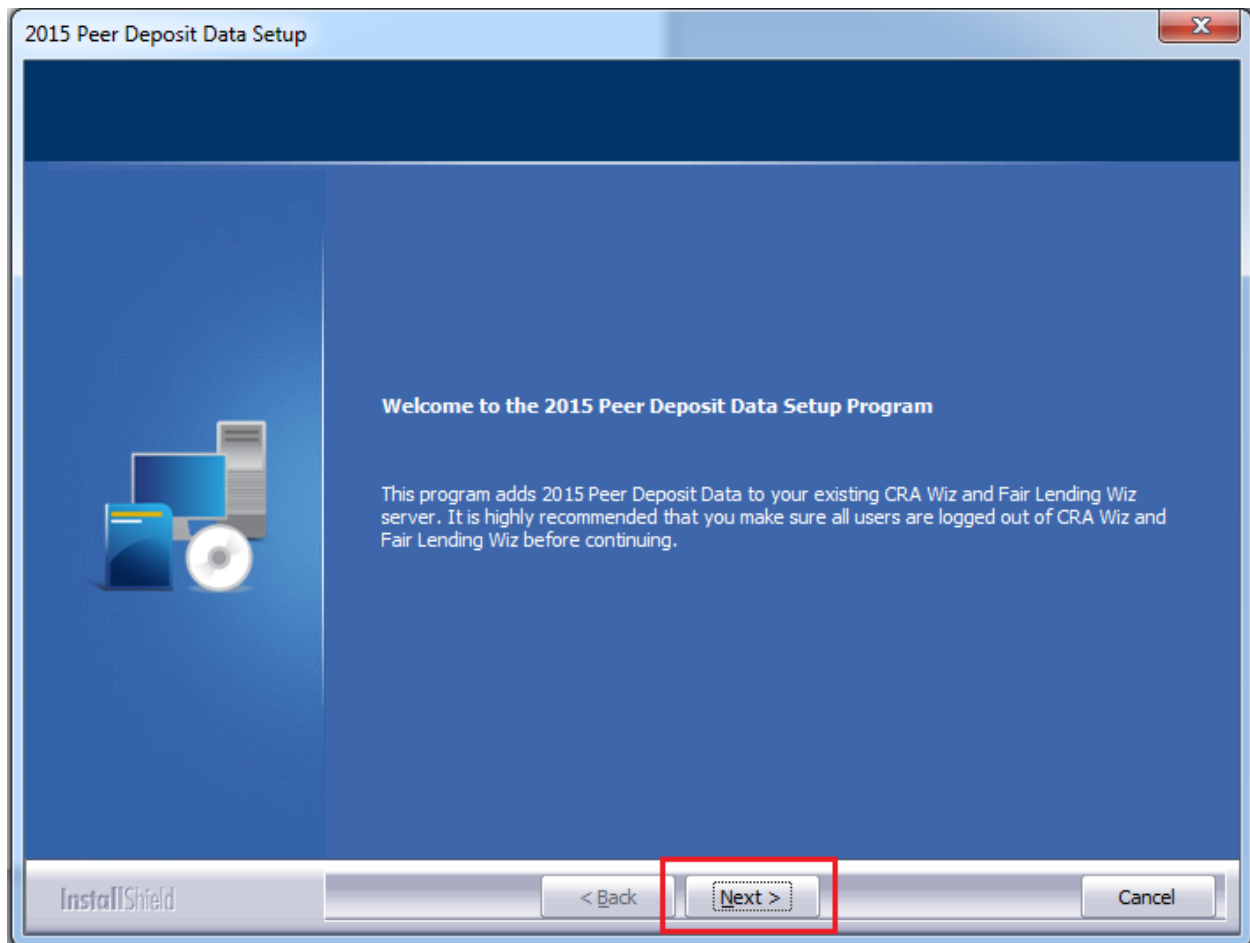
1. After downloading the update, locate and double-click the **2015PeerDepositData** installation file.

The installer displays the **Welcome** screen.

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

### Welcome Screen

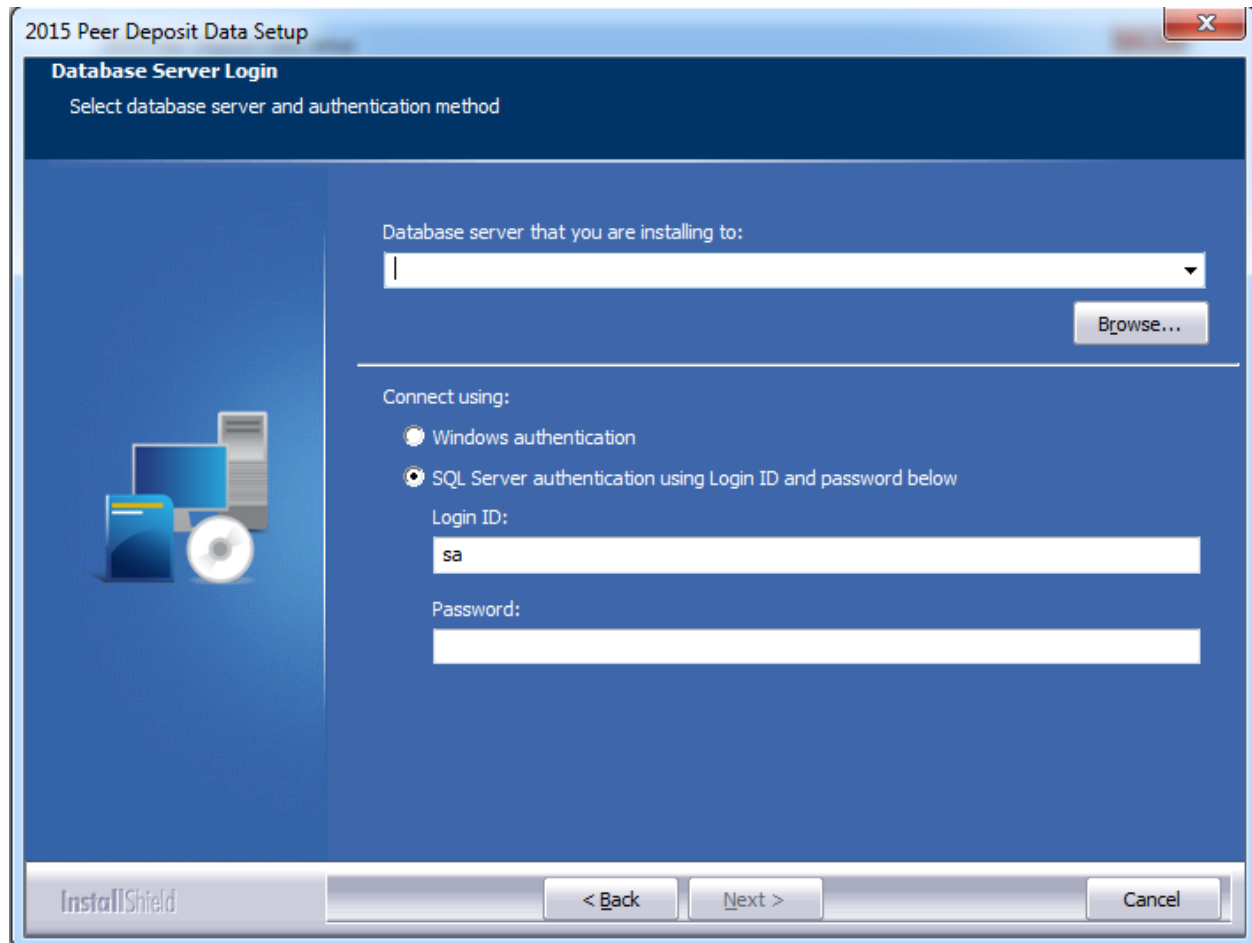
Click the **Next** button:



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:



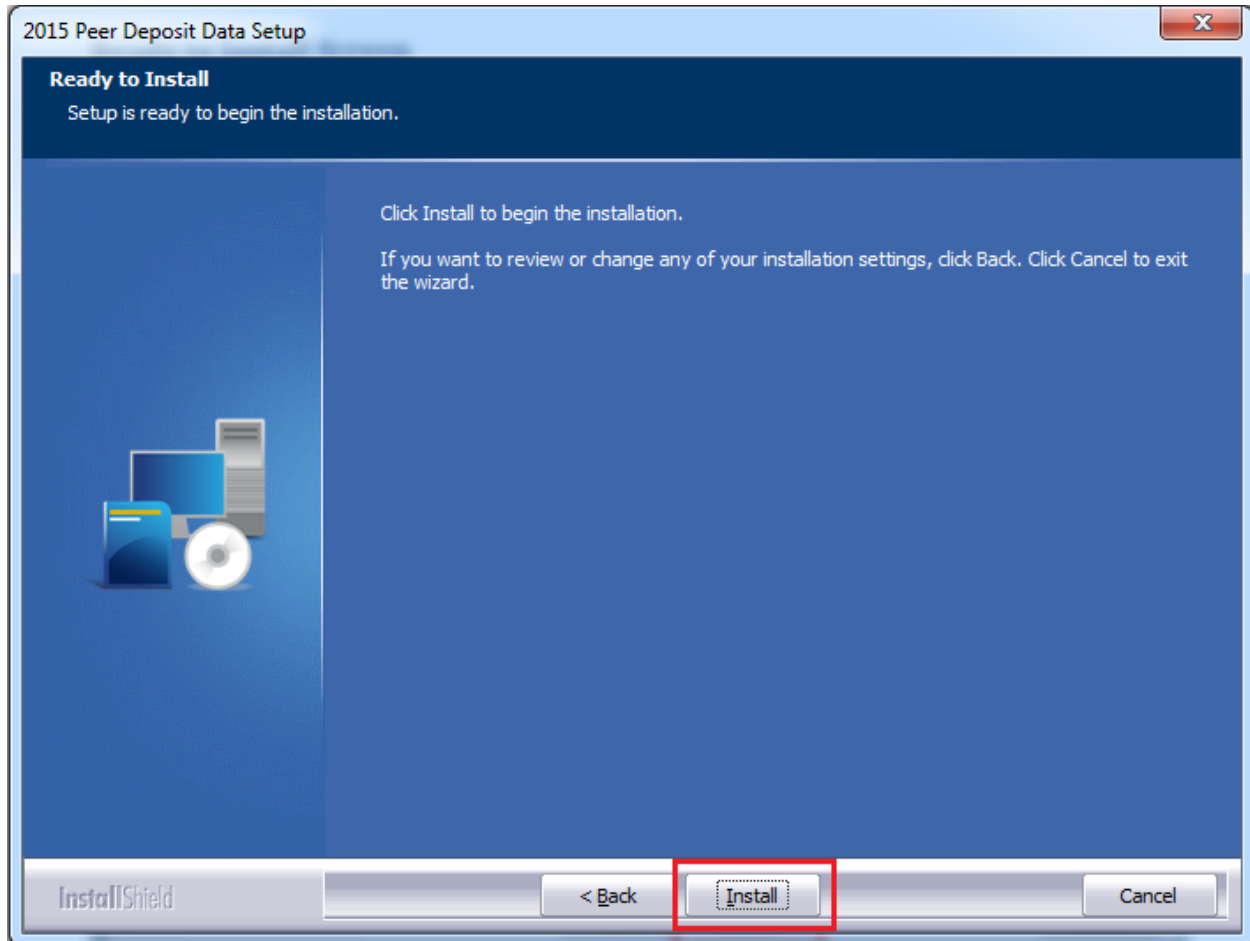
To configure login options, follow these steps:

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

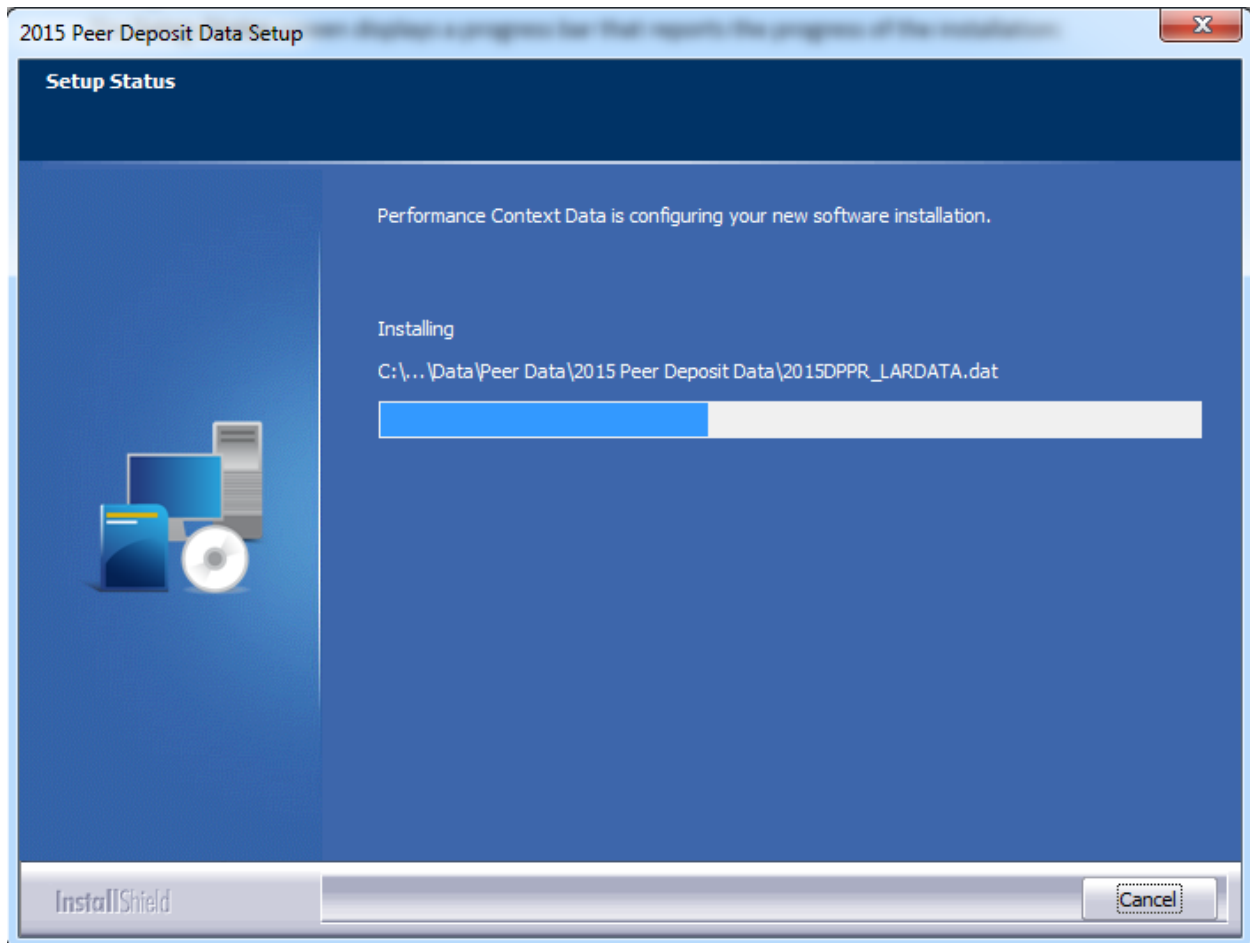
To begin installing the data sets, click the **Install** button:



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

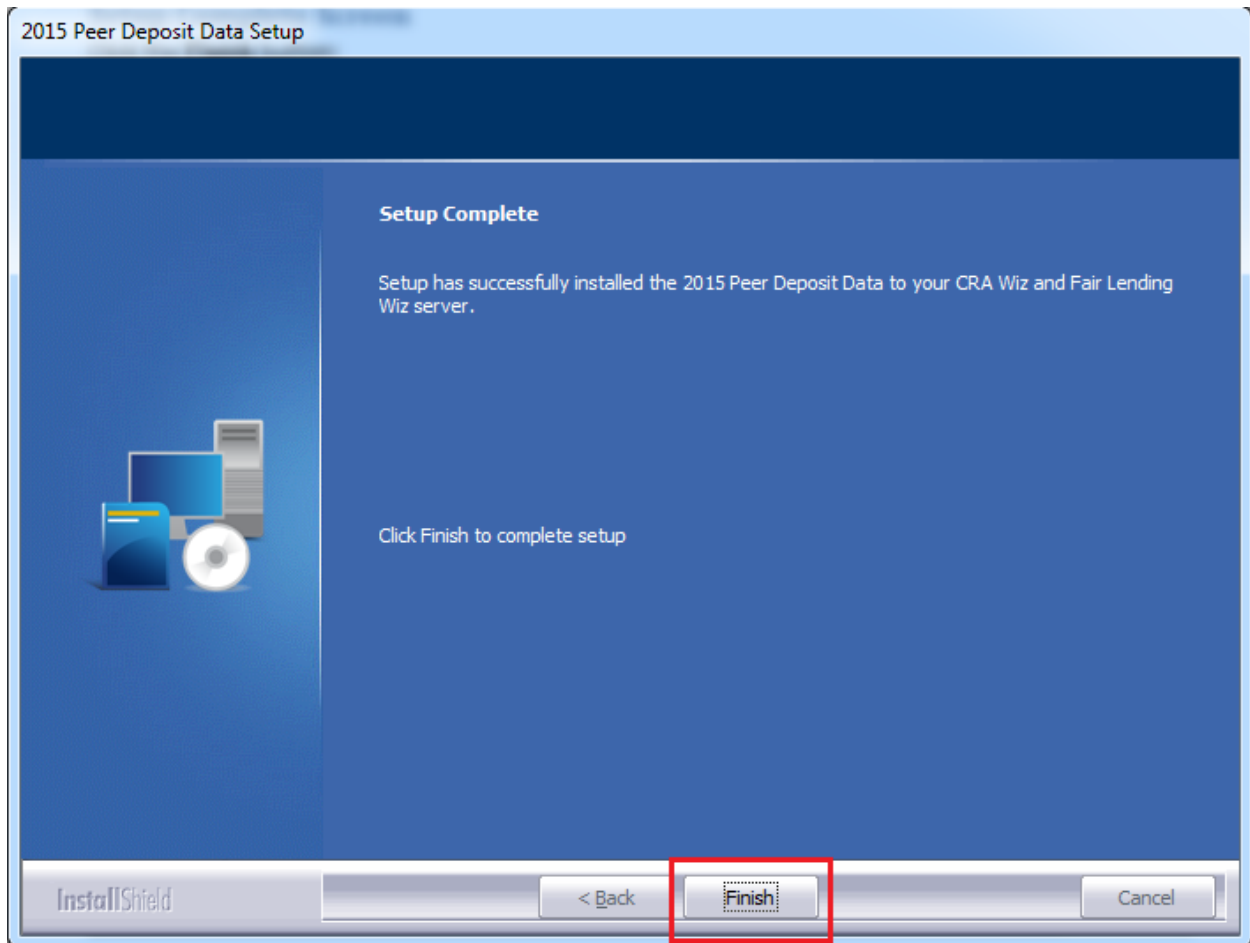
## Setup Status Screen

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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