

A photograph of three business professionals in a meeting, looking at documents and writing on a clipboard. The image is overlaid with a blue gradient.

Consumer Compliance Solutions

# CRA *Wiz* and Fair Lending *Wiz*: 2017 Peer Branch and Deposit Data

Release Notes and Installation Instructions

Release Date: May 2018

## Table of Contents

Overview .....	3
Data Source .....	3
Who Should Install .....	3
Prerequisites .....	3
Required permissions.....	3
Required free space .....	3
Approx. install time .....	3
Confirming Installation.....	3
Installation Instructions .....	4
Welcome Screen .....	4
SQL Server Login Screen.....	5
Ready to Install Screen.....	6
Setup Status Screen .....	7
Setup Complete Screen.....	8

## 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 7.3 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 "73" 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 **2017 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 2017 Peer Branch and Deposit Data installer.

## Installation Instructions

To install 2017 Peer Branch and Deposit Data, follow these steps:

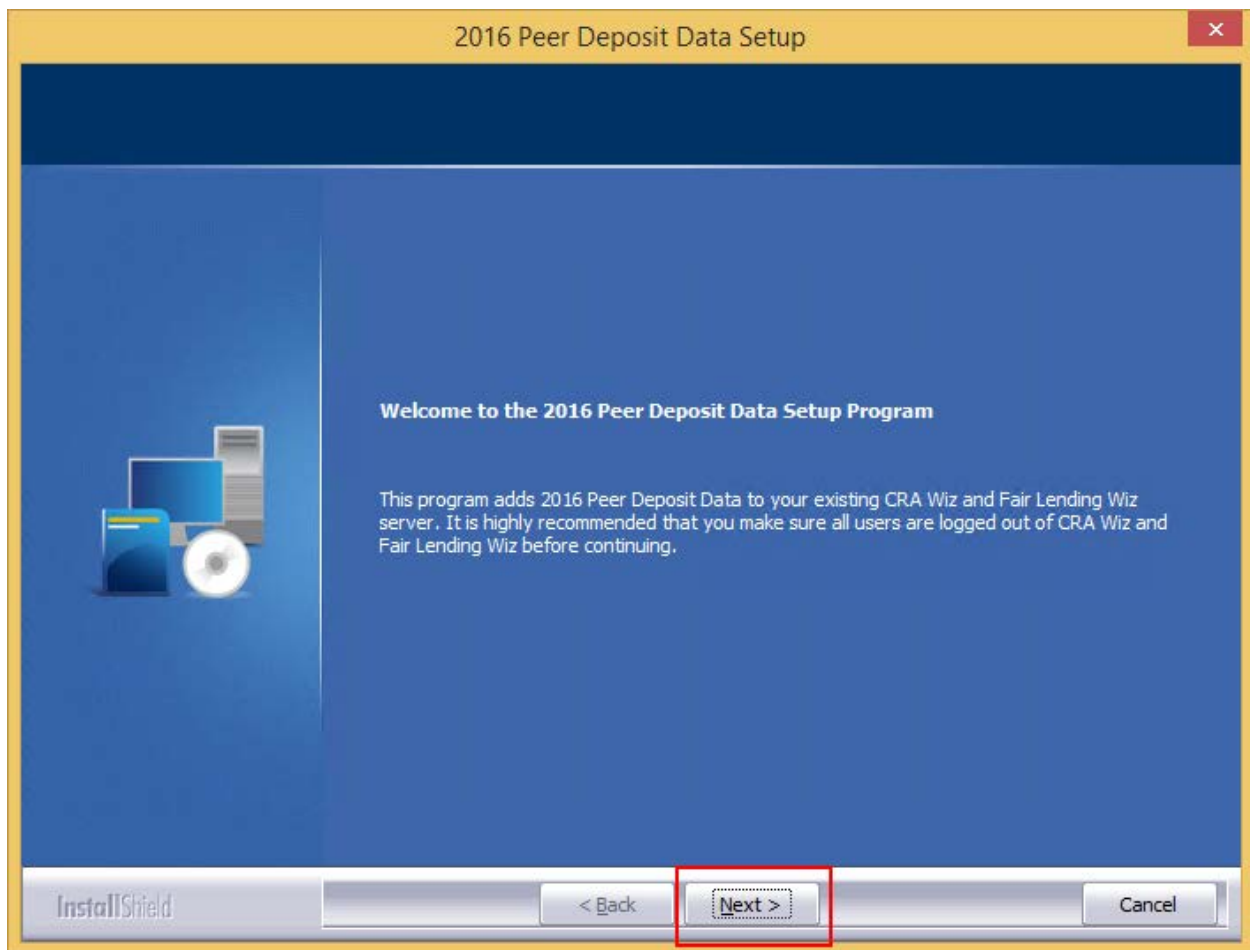
1. After downloading the update locally on the SQL Server, locate and double-click the **2017PeerDepositData** installation file.

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:

**Database Server Login**  
Select database server and authentication method

Database server that you are installing to:  
[Dropdown menu] [Browse...]

Connect using:

- Windows authentication
- SQL Server authentication using Login ID and password below

Login ID:  
sa

Password:  
[Text input field]

InstallShield [ < Back ] [ Next > ] [ Cancel ]

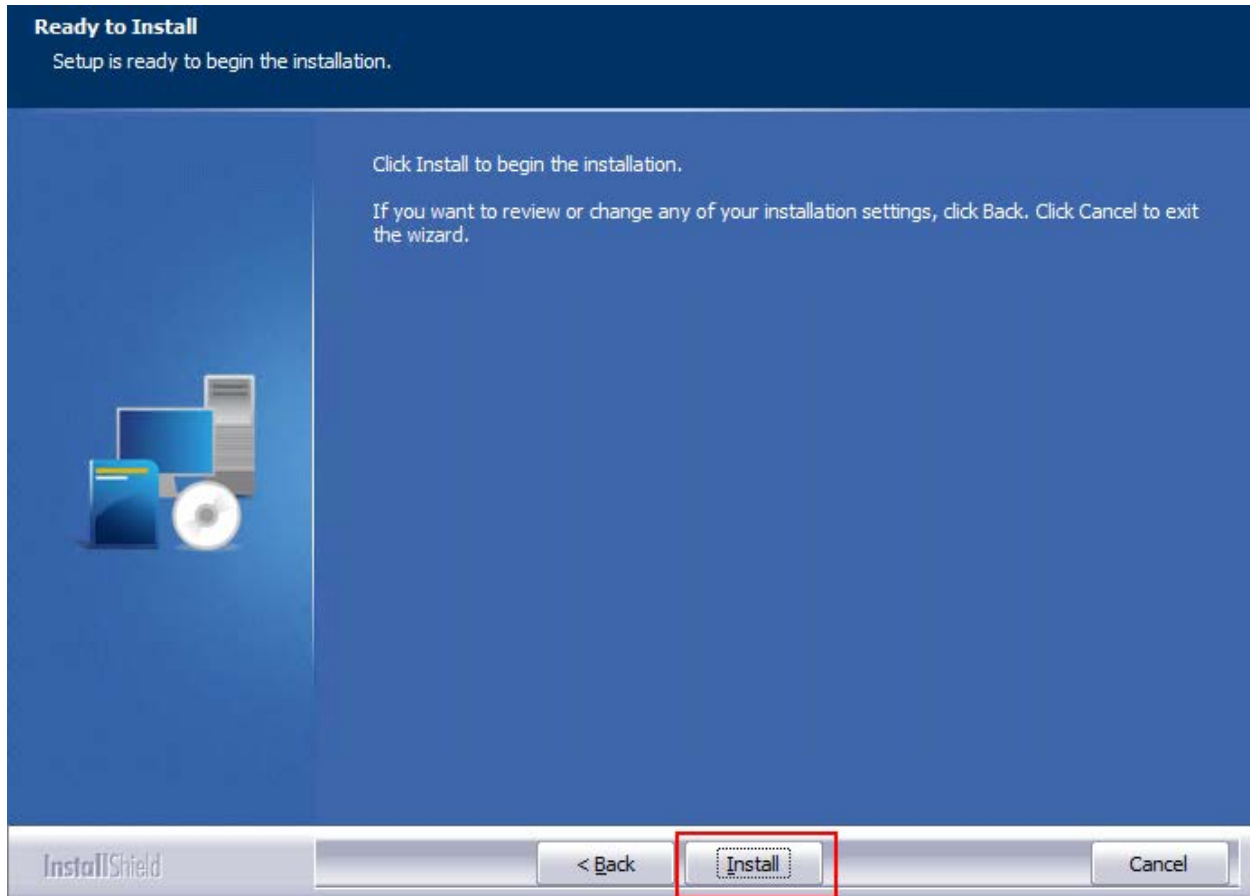
To configure login options, follow these steps:

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

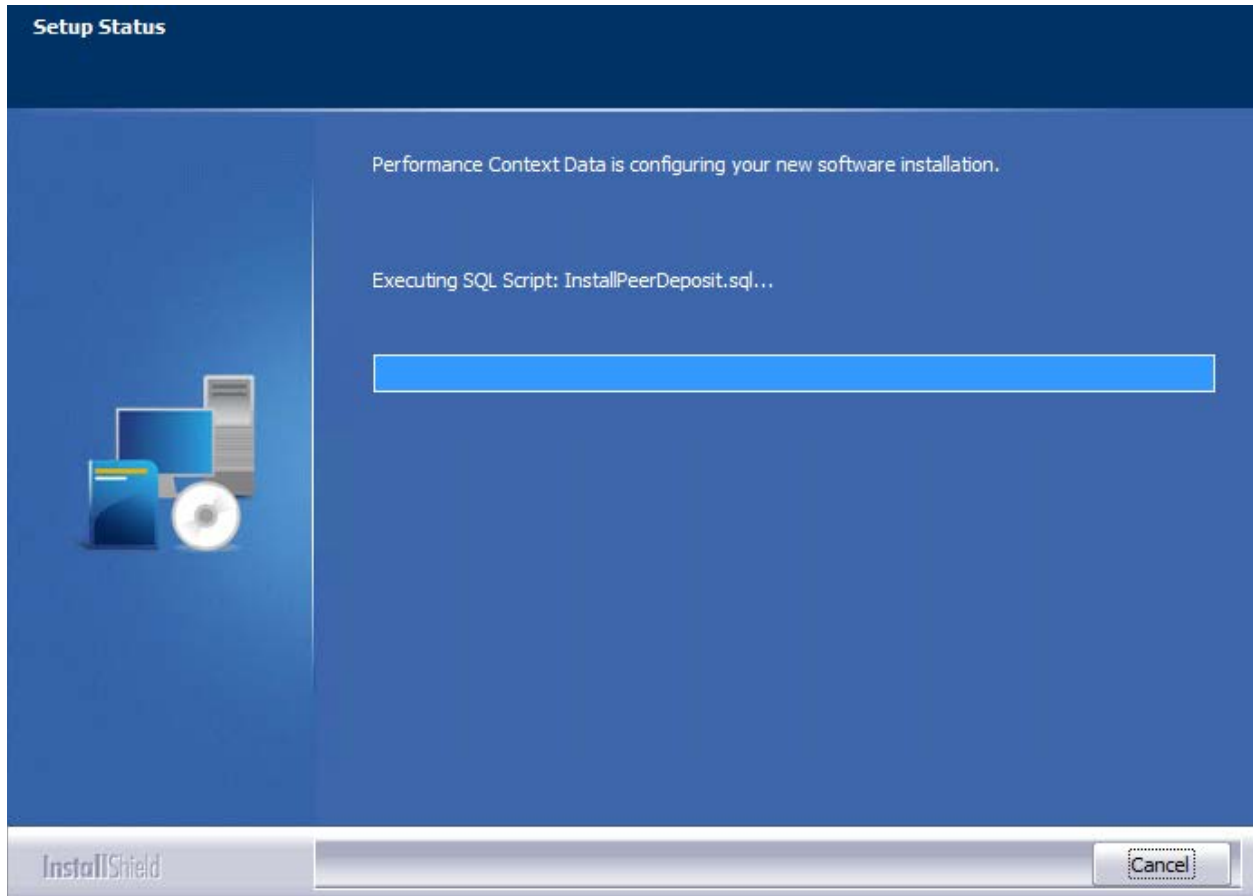
To begin installing the data sets, click the **Install** button:



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

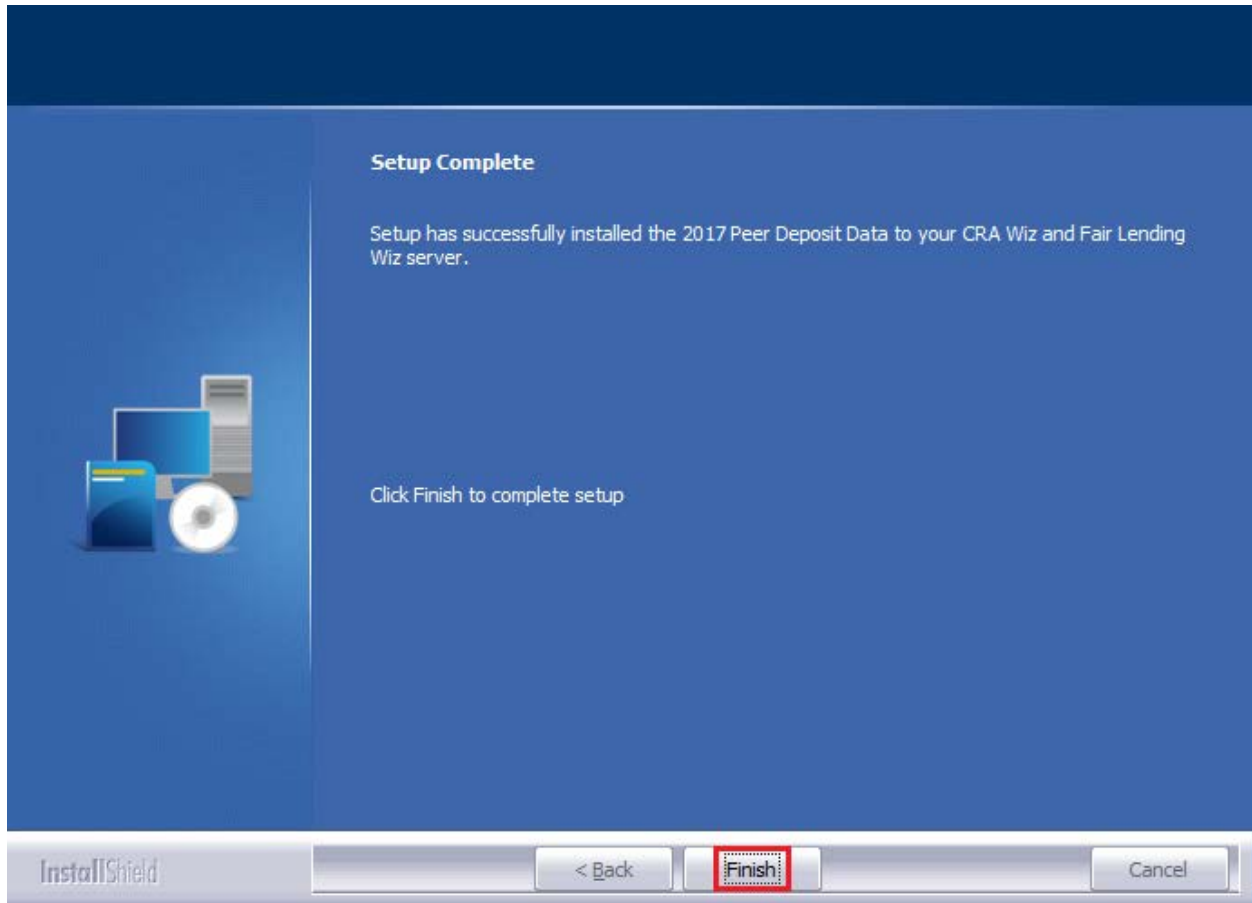
## Setup Status Screen

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.



**About Wolters Kluwer Financial Services** - Wolters Kluwer Financial Services provides audit, risk and compliance solutions that help financial organizations improve efficiency and effectiveness across their enterprise. Whether complying with regulatory requirements, addressing a single key risk, or working toward a holistic risk management strategy, more than 15,000 customers worldwide count on Wolters Kluwer Financial Services for a comprehensive and dynamic view of risk management and compliance. With more than 30 offices in over 20 countries, the company's prominent brands include: FRSGlobal, ARC Logics for Financial Services, PCi, Bankers Systems, VMP® Mortgage Solutions, AppOne®, GainsKeeper®, Capital Changes, NILS, AuthenticWeb™ and Uniform Forms™. Wolters Kluwer Financial Services is part of Wolters Kluwer, a leading global information services and publishing company with annual revenues of (2011) €3.4 billion (\$4.7 billion) and approximately 19,000 employees worldwide. Please visit our website for more information.

**Wolters Kluwer Financial Services**  
130 Turner Street  
Building 3, 4th Floor  
Waltham, MA 02453

800.261.3111

© 2018 Wolters Kluwer Financial Services