

Installation Instructions and  
Release Notes

February 2021

Governance, Risk & Compliance

# CRA *Wiz* and Fair Lending *Wiz*: 2020 Peer Branch and Deposit Data

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# 1 Overview

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

## 1.1 Data Source

FIS

## 1.2 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**.

## 1.3 Prerequisites

**CRA *Wiz* and Fair Lending *Wiz* 7.4 or higher 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 "74" or higher are acceptable.

## 1.4 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.

## 1.5 Required free space

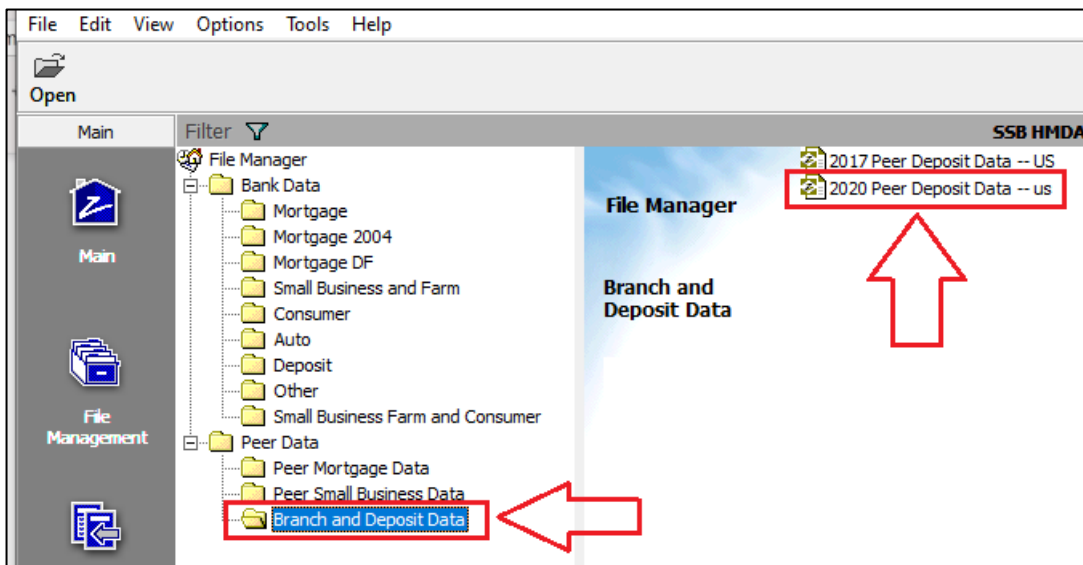
Approximately 600 megabytes (MB).

## 1.6 Approx. install time

Approximately one (1) minute.

## 1.7 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 **2020 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 2020 Peer Branch and Deposit Data installer.

## 2 Installation Instructions

To install **2020 Peer Branch and Deposit Data**, follow these steps:

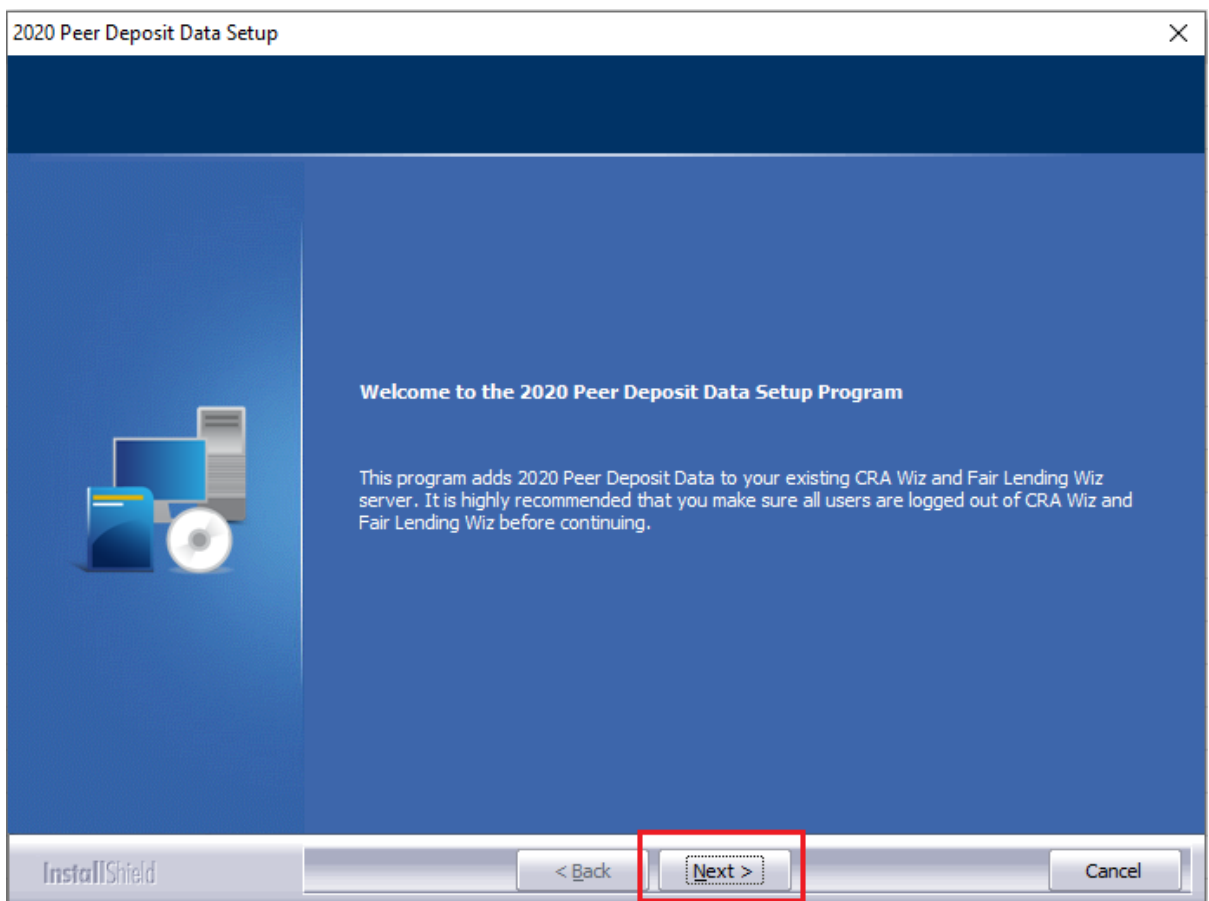
1. After downloading the update locally on the SQL Server, locate and double-click the **2020PeerDepositData.exe** installation file.

The installer displays the **Welcome** screen.

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

### 2.1 Welcome Screen

Click the **Next** button:



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

## 2.2 SQL Server Login Screen

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

2020 Peer Deposit Data Setup

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

Database server that you are installing to:

Browse...

Connect using:

Windows authentication

SQL Server authentication using Login ID and password below

Login ID:

sa

Password:

InstallShield

< Back Next > Cancel

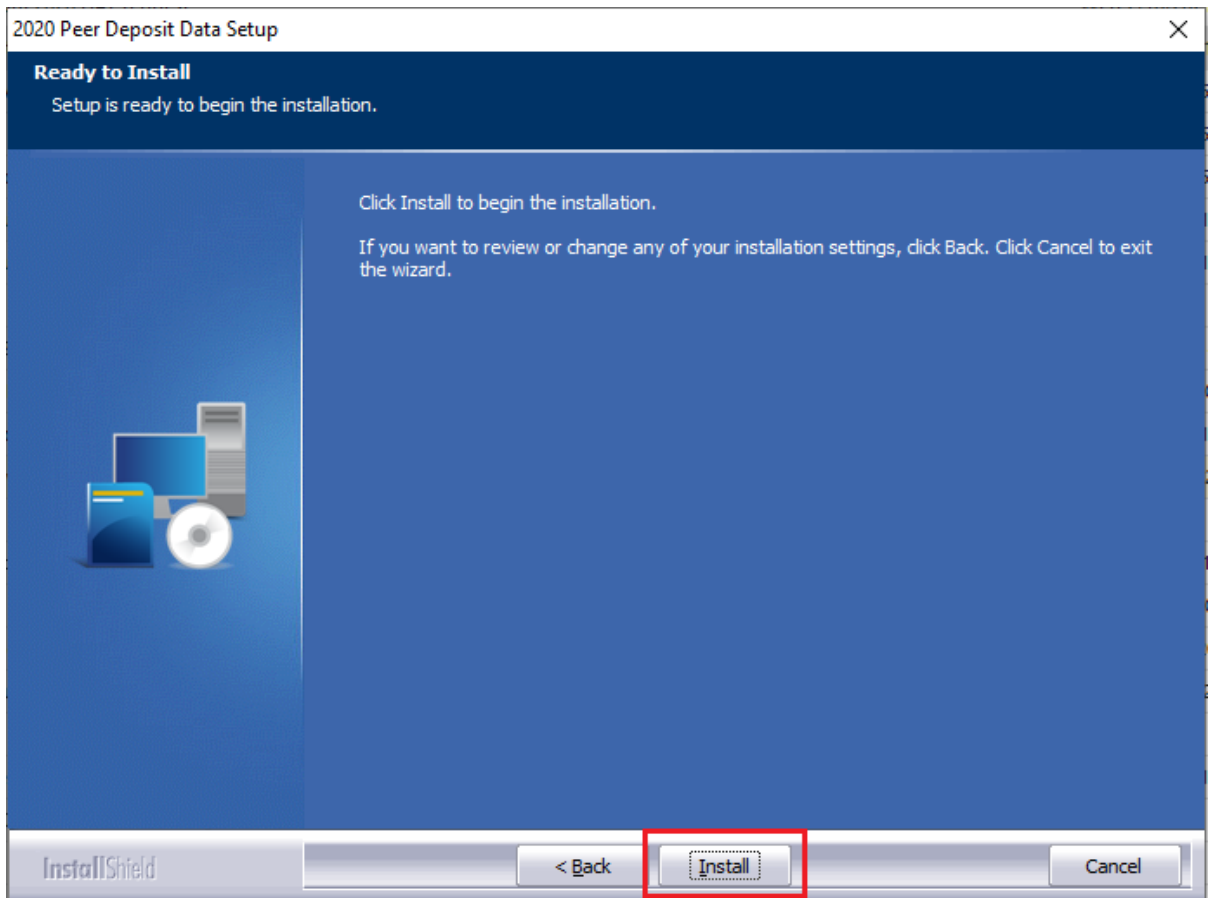
To configure login options, follow these steps:

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.

## 2.3 Ready to Install Screen

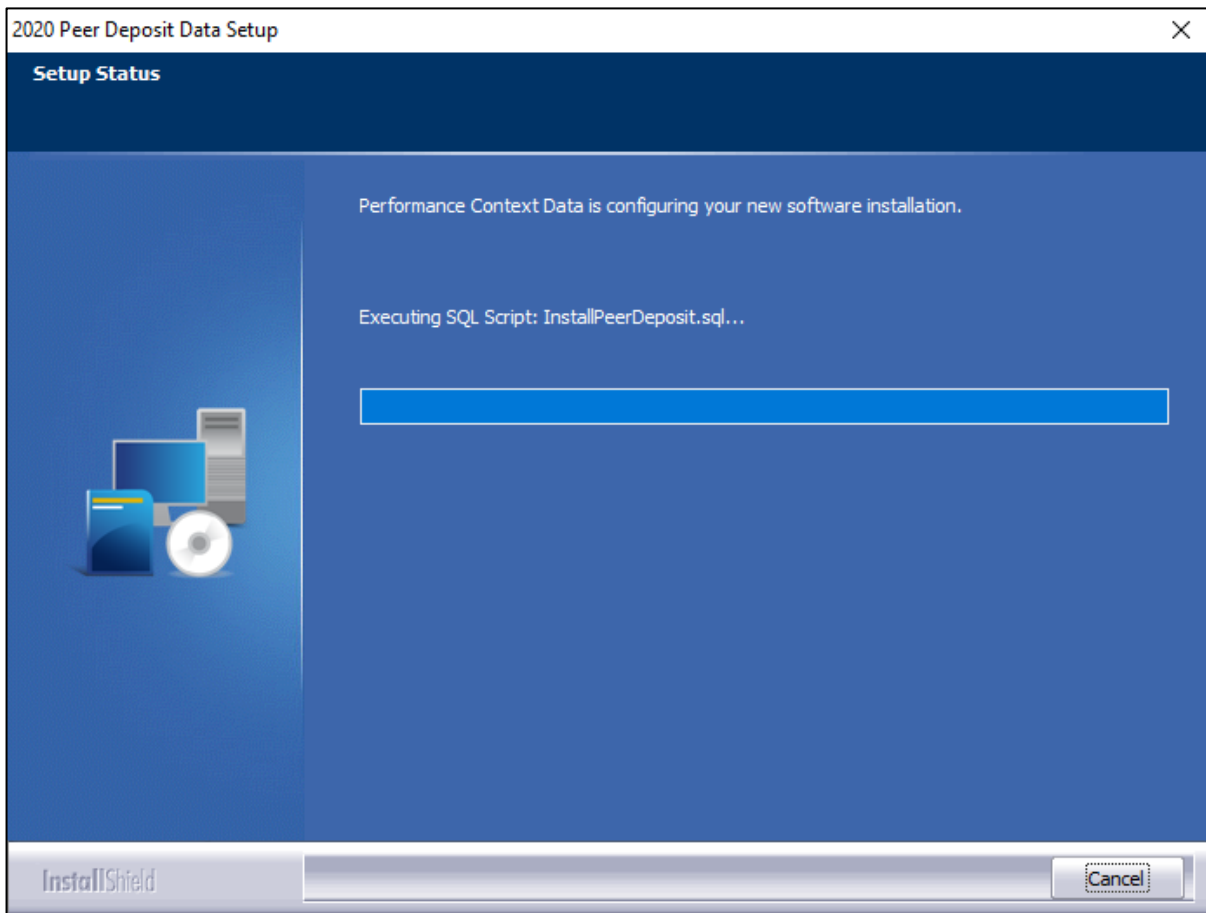
To begin installing the data sets, click the **Install** button:



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

## 2.4 Setup Status Screen

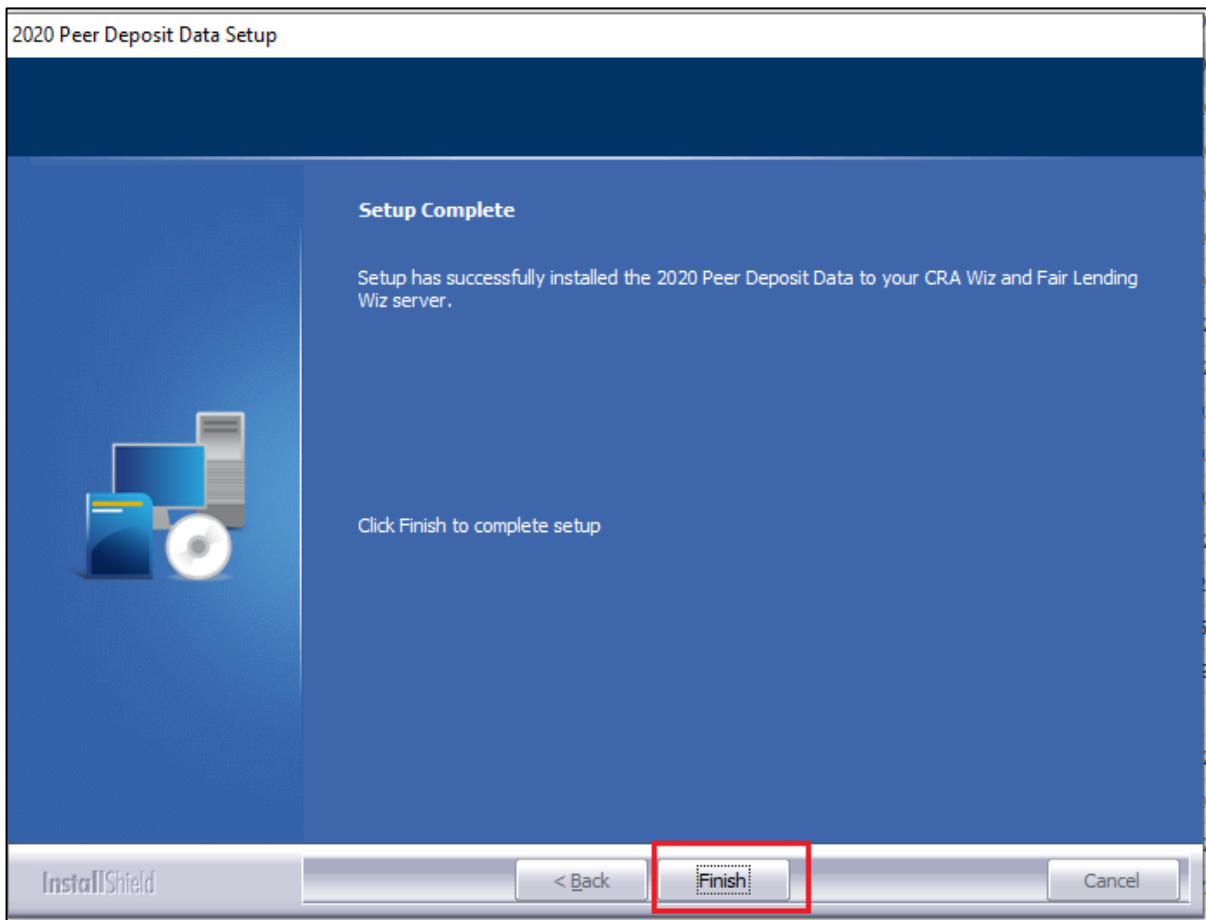
The **Setup Status** screen displays a progress bar that reports the progress of the installation:





## 2.5 Setup Complete Screen

Click the **Finish** button:



Installation is complete.

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