

Installation Instructions and
Release Notes

January 2024

Governance, Risk & Compliance

CRA *Wiz* and Fair Lending *Wiz*: 2023 Peer Branch and Deposit Data

Content

1	Overview	3
1.1	Data Source	3
1.2	Who Should Install	3
1.3	Prerequisites	3
1.4	Required permissions	3
1.5	Required free space	3
1.6	Approx. install time	3
1.7	Confirming Installation	3
2	Installation Instructions	5
2.1	Welcome Screen	5
2.2	SQL Server Login Screen	6
2.3	Ready to Install Screen	7
2.4	Setup Status Screen	8
2.5	Setup Complete Screen	9

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* 7.7 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 "7.7" 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

Workstation: approximately 550MB (megabytes)

Server: approximately 600MB (megabytes)

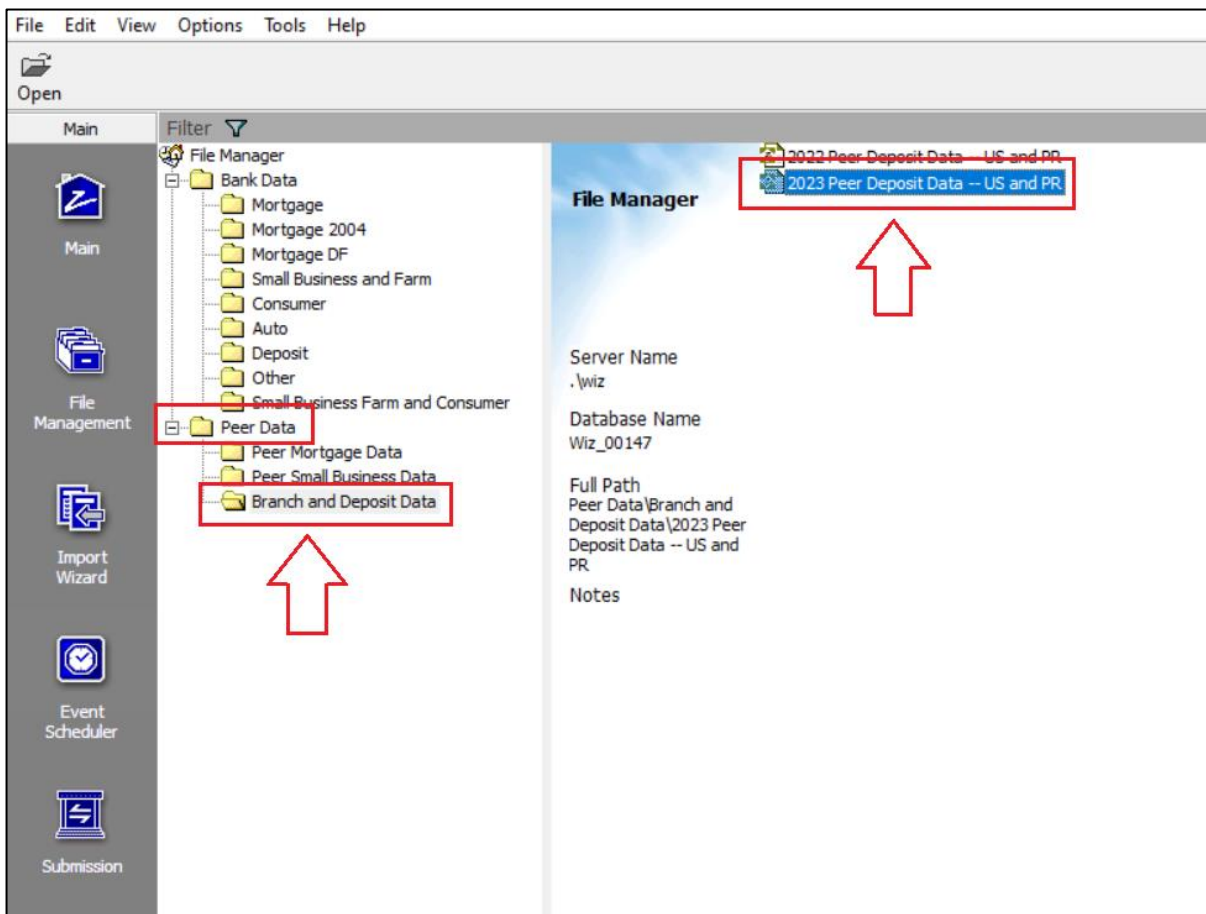
1.6 Approx. install time

Workstation: approximately one (1) minute.

Server: 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 2020**, located in the **Options** menu bar item. The software will then display a file named **2023 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 2023 Peer Branch and Deposit Data installer.

2 Installation Instructions

To install **2023 Peer Branch and Deposit Data**, follow these steps:

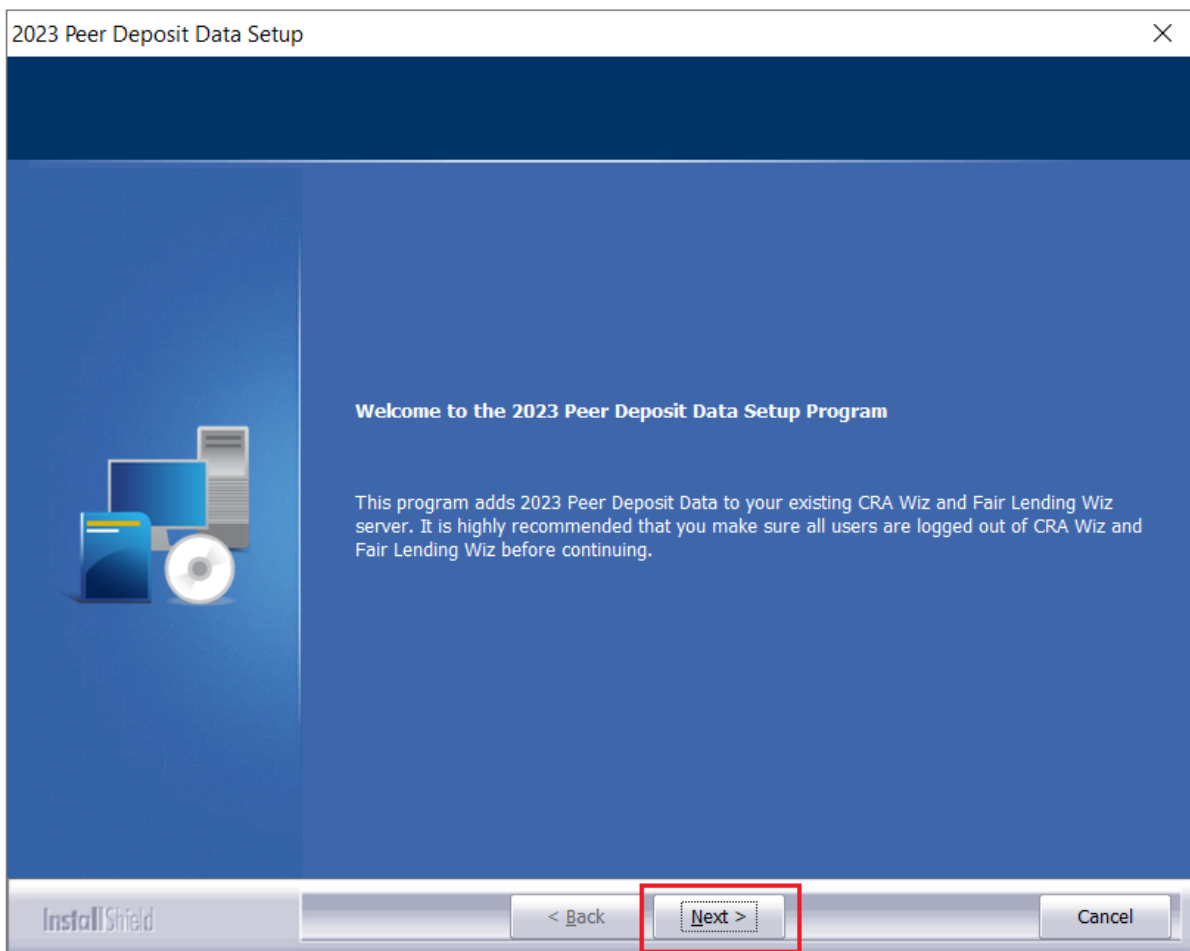
1. After downloading the update locally on the SQL Server, locate and double-click the **2023PeerDepositData.exe** installation file.

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:

2023 Peer Deposit Data Setup

Database Server Login
Select database server and authentication method

Database server that you are installing to:
ServerNameHere

Browse...

Connect using:

Windows authentication

SQL Server authentication using Login ID and password below

Login ID:
sa

Password:

InstallShield

< Back Next > Cancel

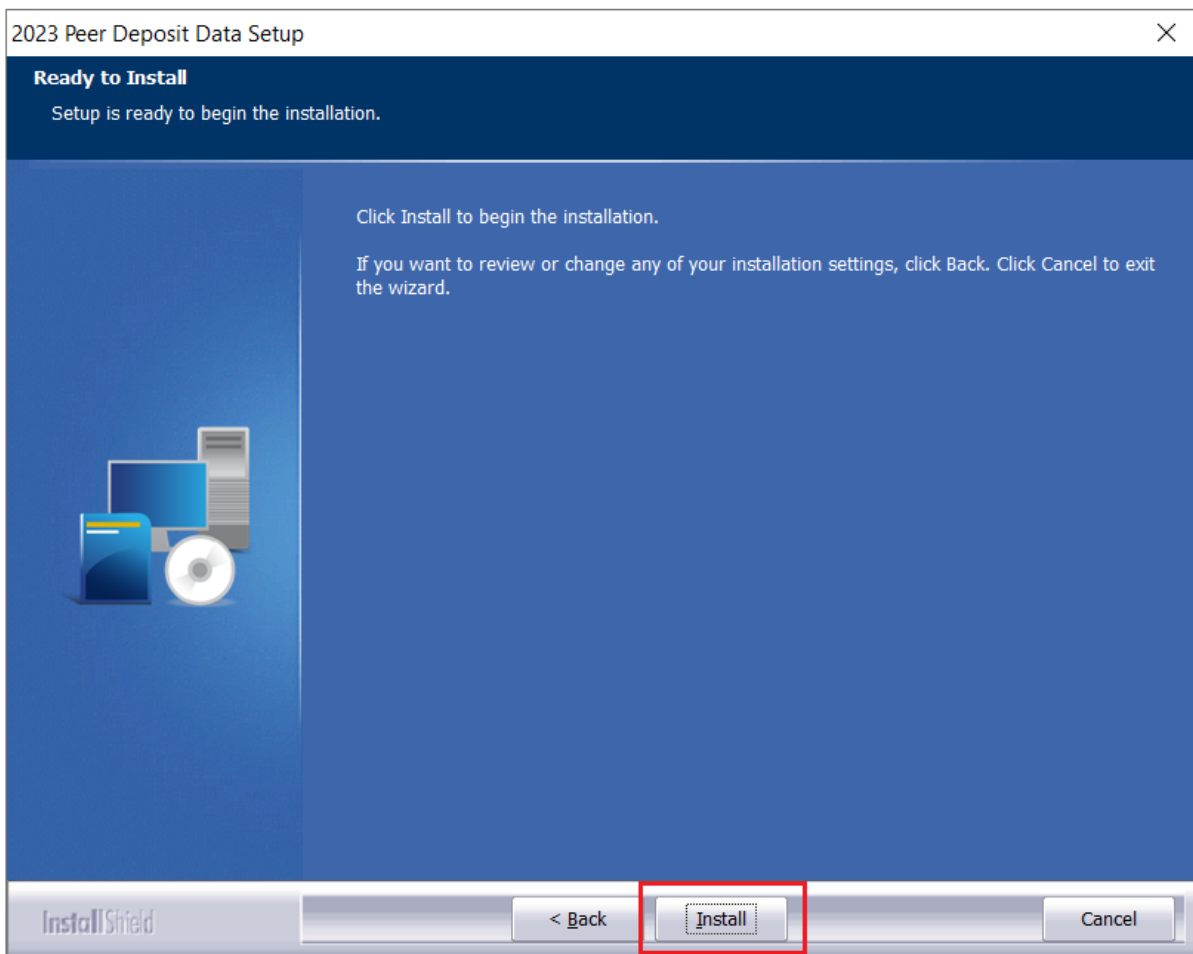
To configure login options, follow these steps:

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

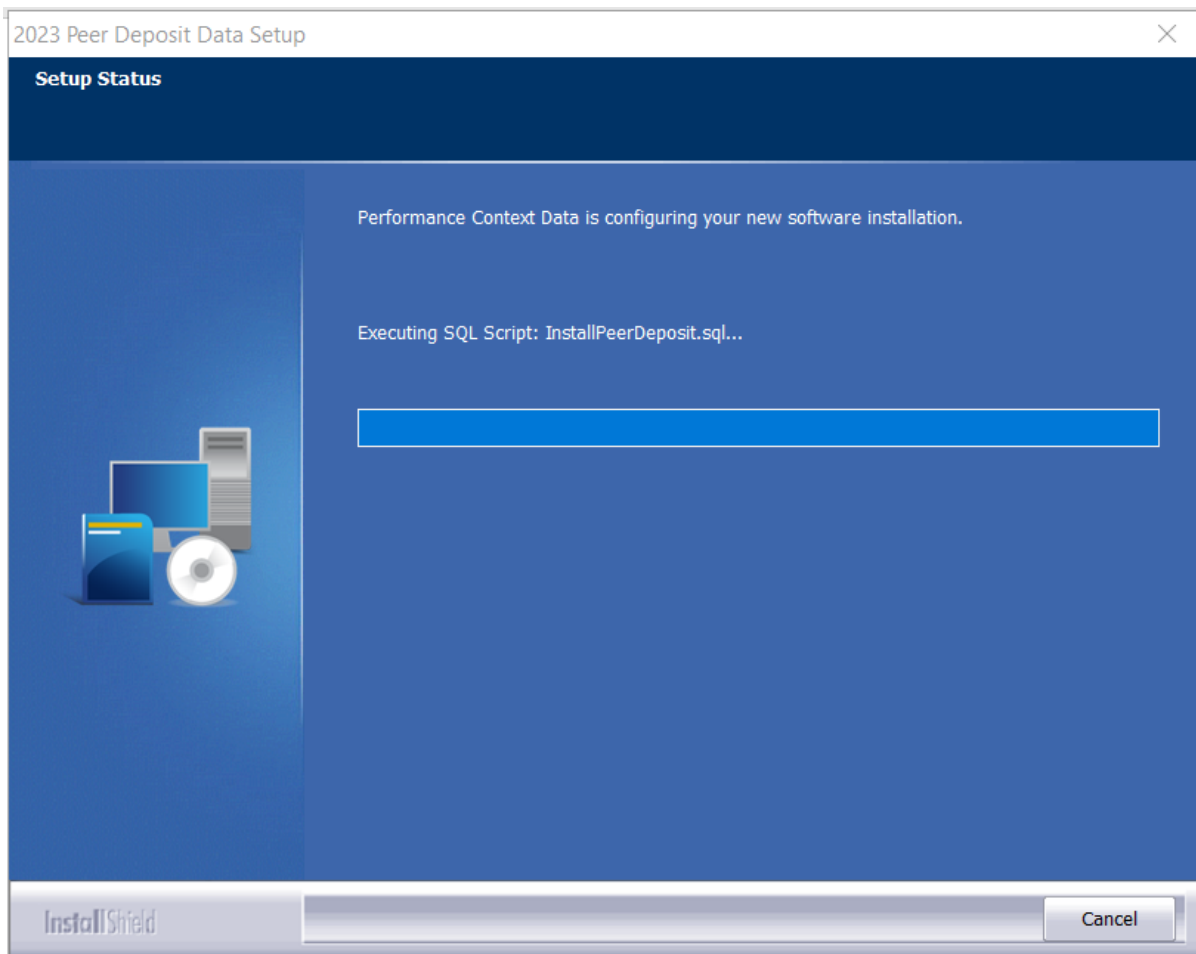
To begin installing the data sets, click the **Install** button:



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

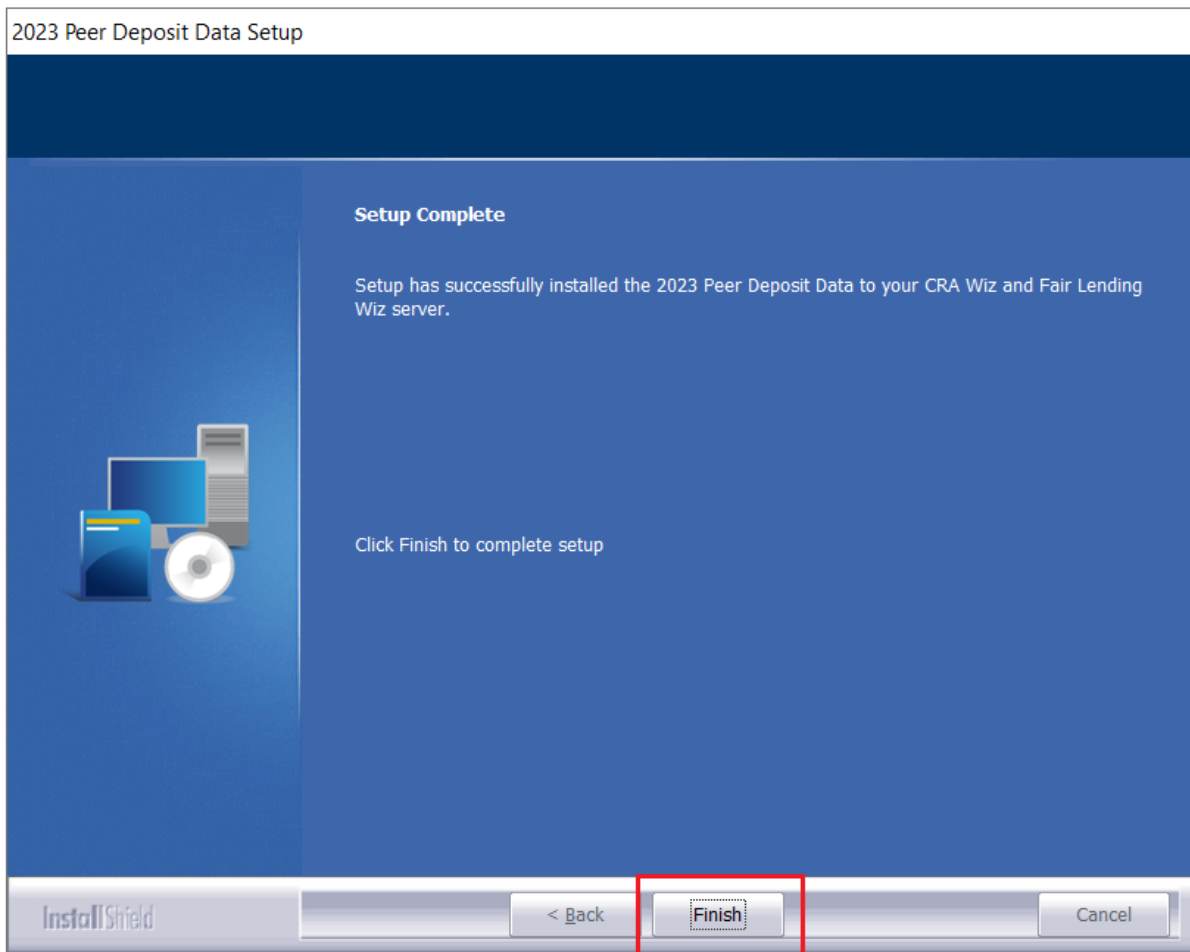
2.4 Setup Status Screen

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.

About Wolters Kluwer: Wolters Kluwer 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 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 is 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.

Confidentiality Notice: This document contains privileged information that is intended for the addressee only. If you are not an intended recipient of the original sender (or responsible for delivering the message to such person), you are hereby notified that any review, disclosure, copying, distribution or the taking of any action in reliance of the contents of and links to attachments in the document is strictly prohibited. If you have received this in error, please immediately notify the sender and permanently delete any copies of this document (digital or paper) in your possession.

Wolters Kluwer
230 3rd Ave.
Waltham, MA
02453
800.261.3111