CRA *Wiz* and Fair Lending *Wiz* 7.0: 2014 Performance Context Data

Release Notes and Installation Instructions

Release Date: March 2015

Wolters Kluwer
Financial Services

Table of Contents

Overview

The 2014 Performance Context Data installation package allows users to add the following datasets to CRA *Wiz* and Fair Lending *Wiz* with one installation:

- 2013 Peer Branch & Deposit
- 2013 Peer Small Business
- 2014 Business Demographics
- 2014 Projected Demographics

Details for each individual dataset can be found in their respective release documentation on the **Wiz Web Center**.

Who should install

Any client licensed for one or more of the datasets above that has not already included them in CRA *Wiz* and Fair Lending *Wiz* should run this install. To determine if you are licensed for a dataset, go to the **System Maintenance** screen and select **License and Access Management**.

Where to install

This dataset should be installed on the SQL Server where CRA *Wiz* and Fair Lending *Wiz* is hosted. No client installation is required.

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 installs individual tables on your SQL server, so both Windows read/write permissions and SQL Server table creation permissions are required. Wolters Kluwer Financial Services recommends that the user running the install have both Windows admin and SQL Server admin login credentials.

Required free space

2.5 GB

Approximate install time

10 – 15 minutes

Confirming installation

Steps to confirm installation vary by which datasets were selected to install. Please refer to each dataset's respective release documentation for steps to confirm your installation.

Installation Instructions

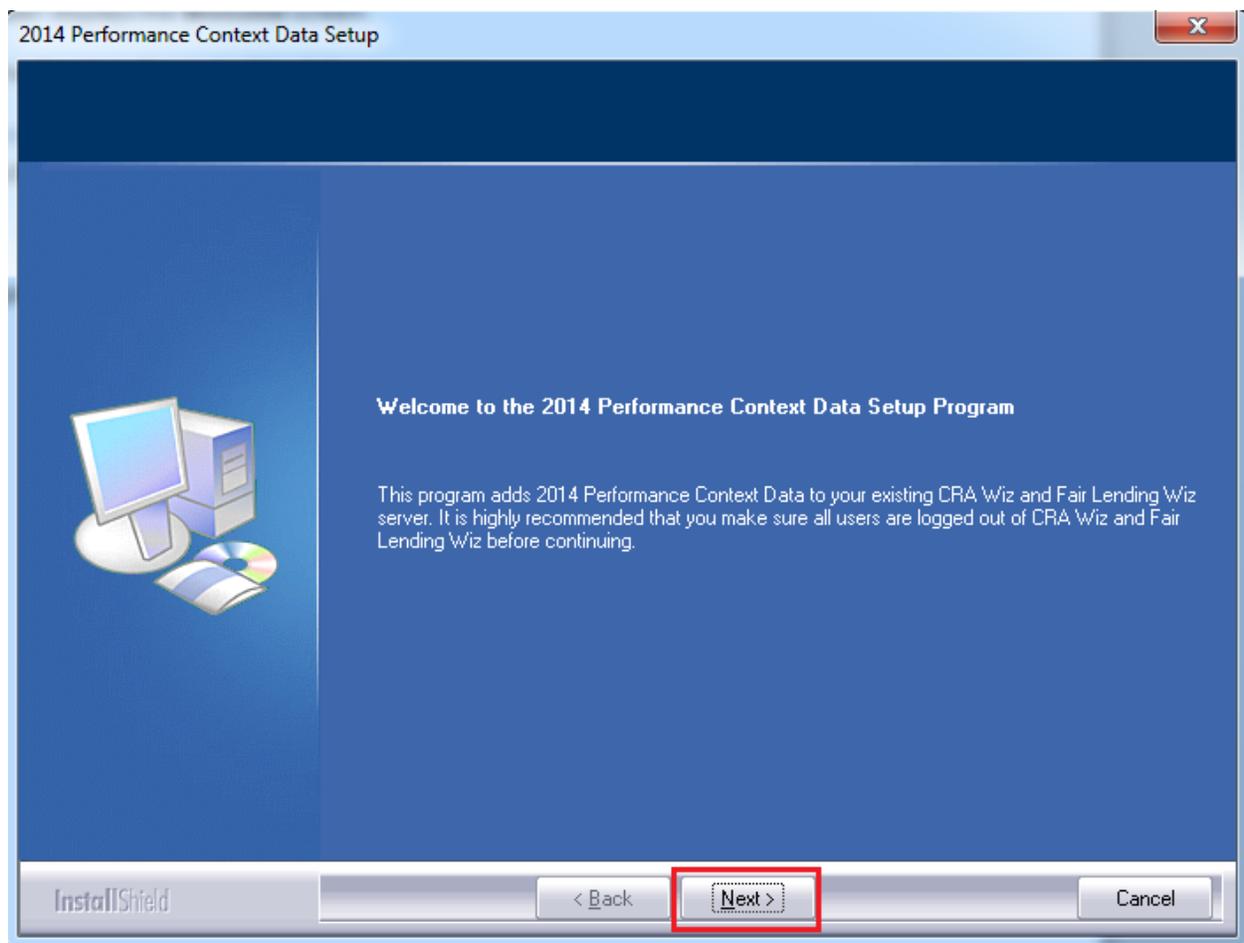To install 2014 Performance Context Data, follow these steps:

1. After downloading the update, locate and double-click the **2014PerformanceContextData** 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 **Database Server Login** screen.

Database Server Login Screen

You use the **Database Server Login** screen to specify the SQL Server to which you are installing to, and also SQL Server login information.

To configure SQL Server options, follow these steps:

1. Do one of the following:
   - In the **Database server that you are installing to** field, enter the **SQL Server name and instance** to which you are installing the data.

     Example: SVRBOS01\SQLEXPRESS

   - Click the **Browse** button and in the resultant dialog box, select the SQL Server.

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.

Wolters Kluwer

Financial Services

3. Click the **Next** button.

The software displays the **Setup Type** screen.

Setup Type Screen

You use this screen to select the type of installation you want to perform:
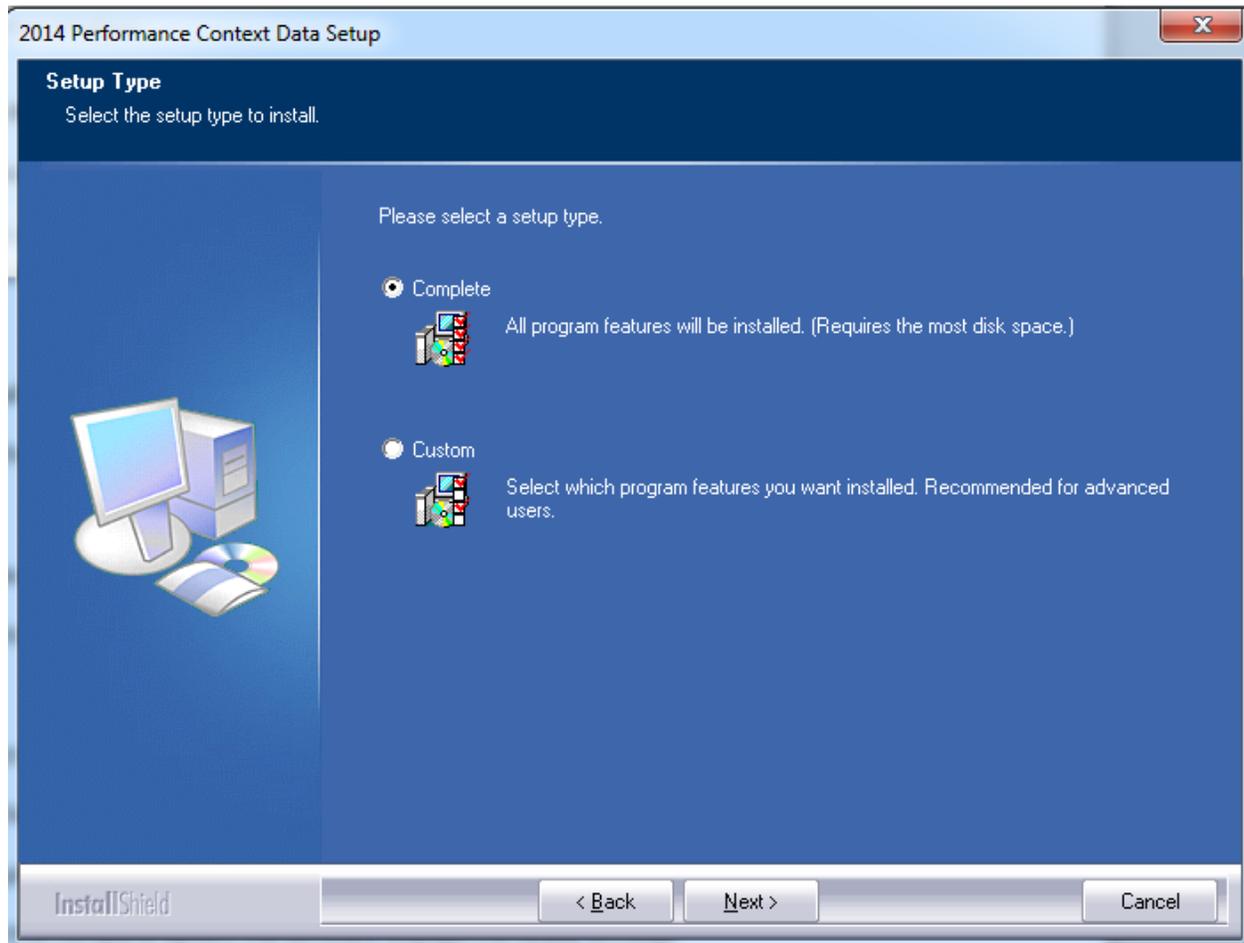
To select an installation type, follow these steps:

1. Select one of the following options:

- Complete - select to install all data sets to your computer.
- Custom - select to install only specific data sets.

2. Click the **Next** button.

The software displays one of the following screens:

- If you selected the **Complete** option, the software displays the **Ready to Install** screen. For more information, refer to

Wolters Kluwer

Financial Services

- If you selected the **Custom** option, the software displays the **Select Features** screen. For more information refer to the following section.

Select Features Screen

You use the **Select Features** screen to select the data sets you want to install.

Note: The installer displays this screen only if you select **Custom** on the **Select Setup Type** screen.

To select components, follow these steps:

1. Select (or deselect) one or more of the available components:
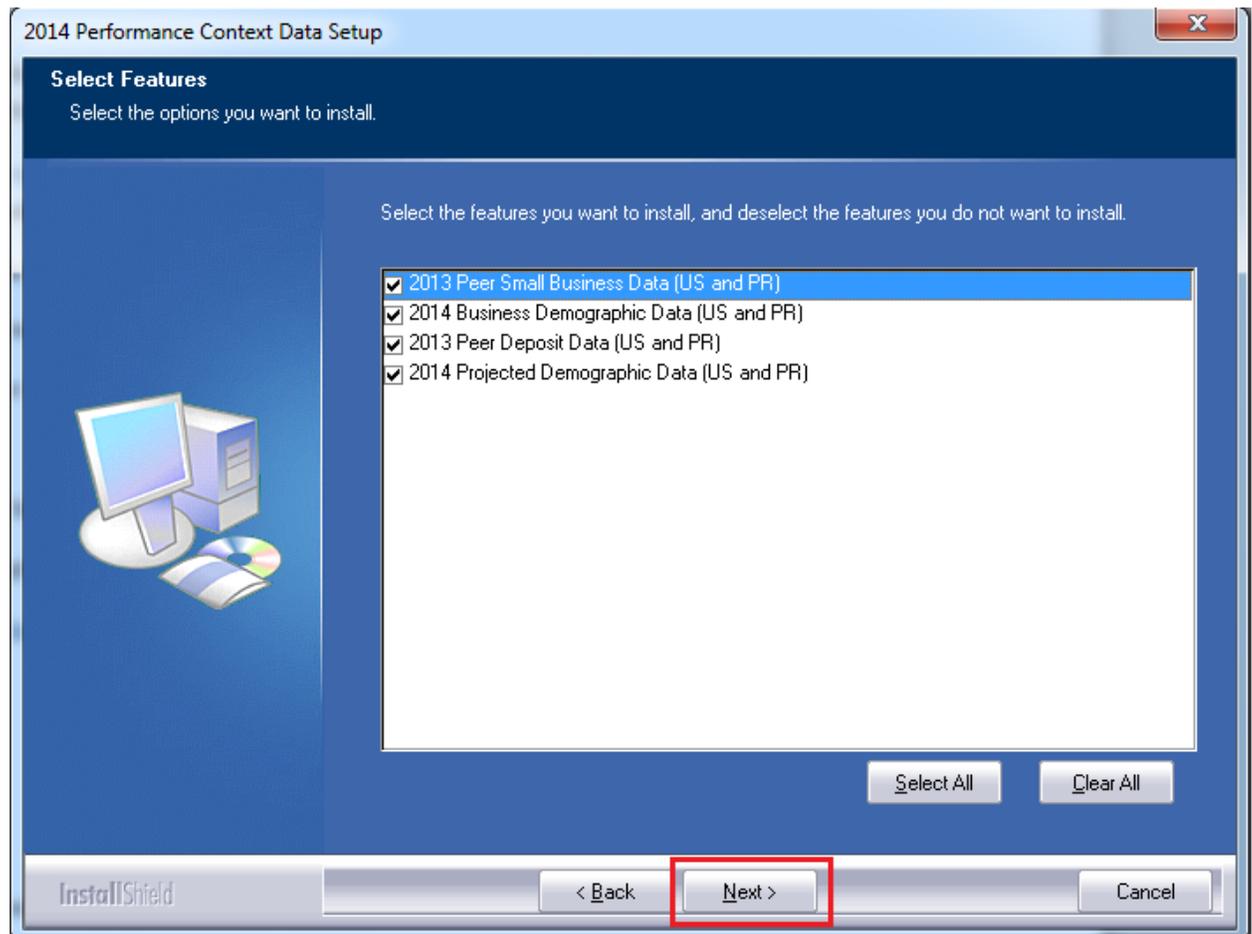
2. Click the **Next** button.

The software displays the **Choose Destination Folders** screen.

Wolters Kluwer
Financial Services

Choose Destination Folders Screen

You use this screen to select the location to which you want to install the Performance Context databases. You can either install the data to the default location or you can select an alternate location:
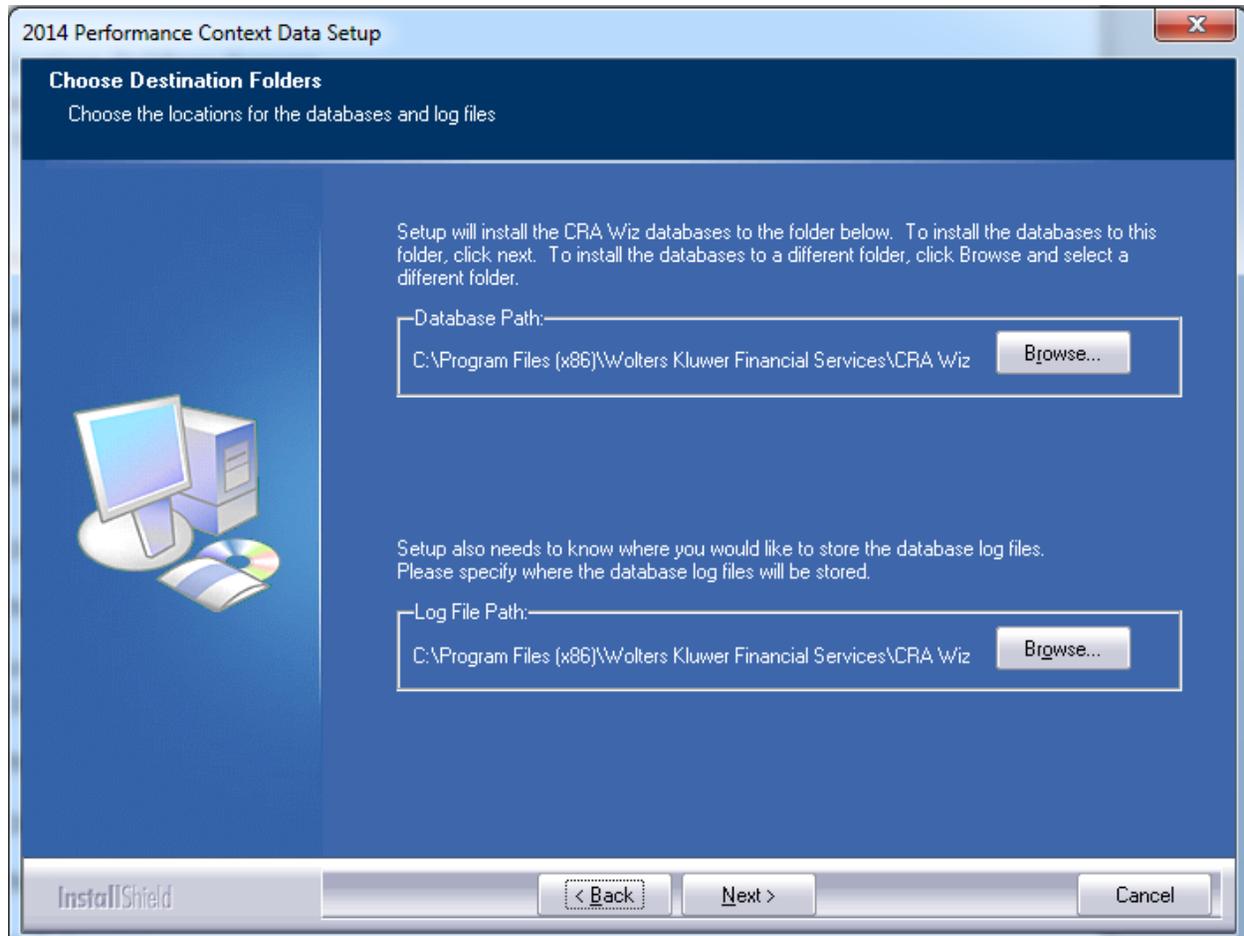

Do one of the following:

- To install to the default location, click the **Next** button.

  The software displays the **Ready to Install** screen. For more information, refer to **Ready to Install Screen** on page 10.

- To install to an alternate location, follow these steps:

  1. Click the **Browse** button for the data path you want to change:

Wolters Kluwer
Financial Services
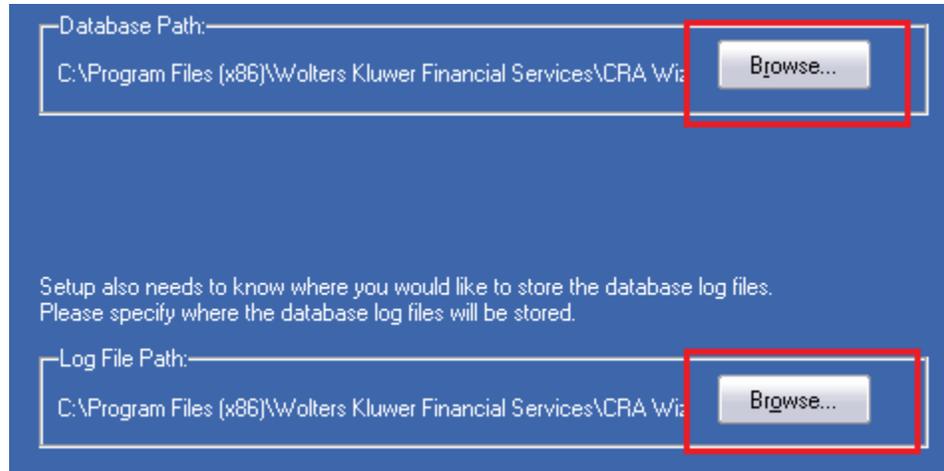
The software displays the **Choose Folder** dialog box:
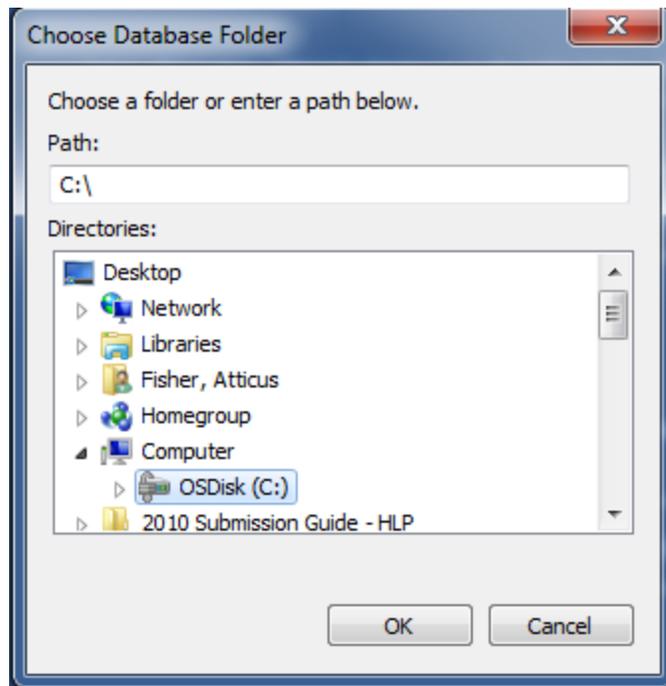
2. Use the **Directories** tree view to select an alternate installation location.
3. Click the **OK** button.

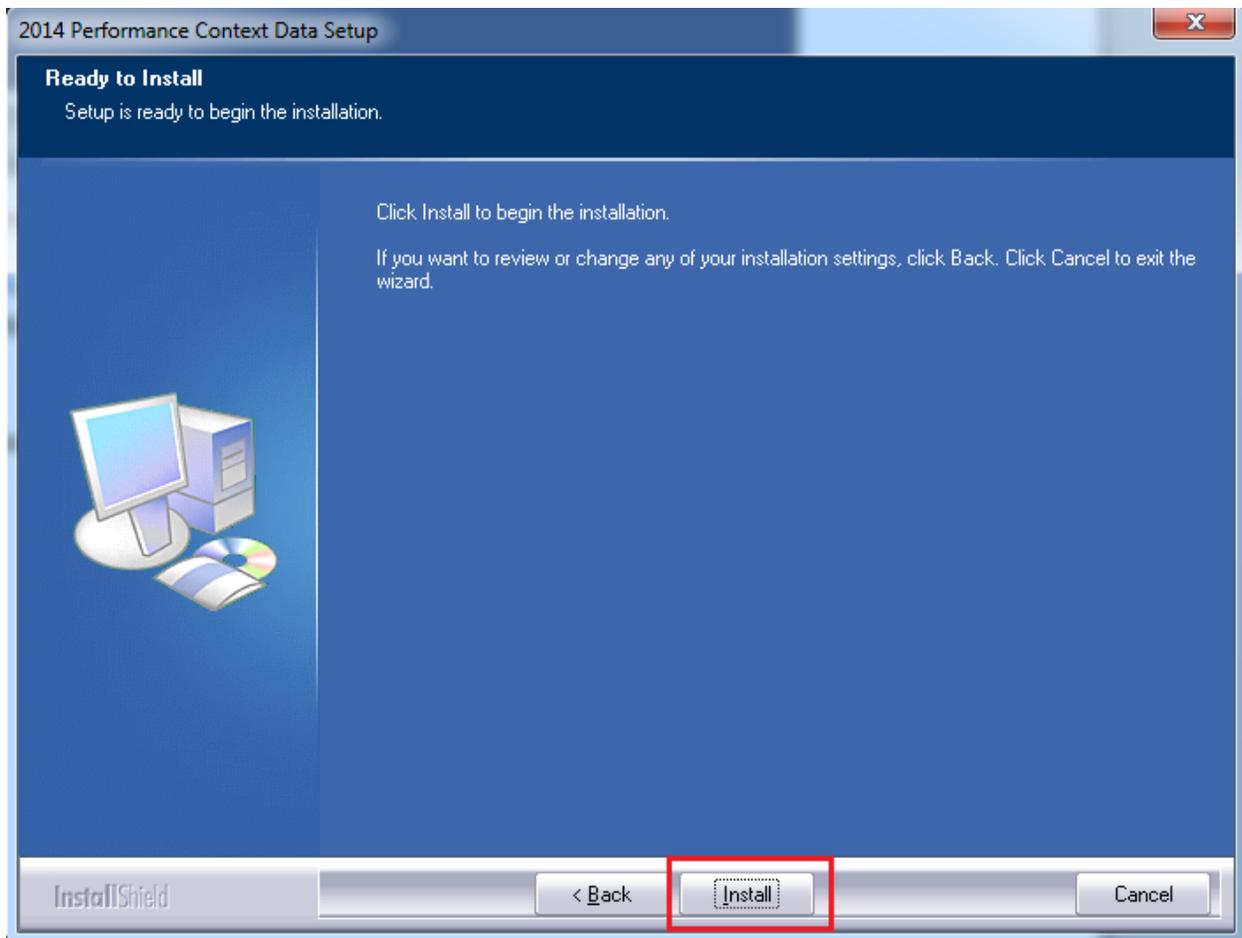   The software makes the **Choose Destination Location** screen the active screen.

4. Click the **Next** button:

Wolters Kluwer
Financial Services
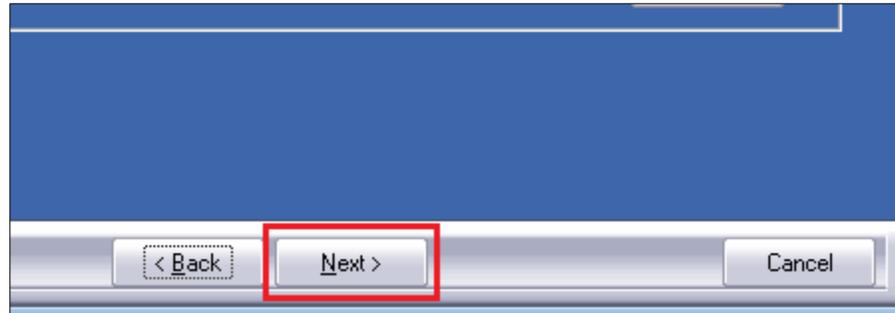
The software displays the **Ready to Install** screen.

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:
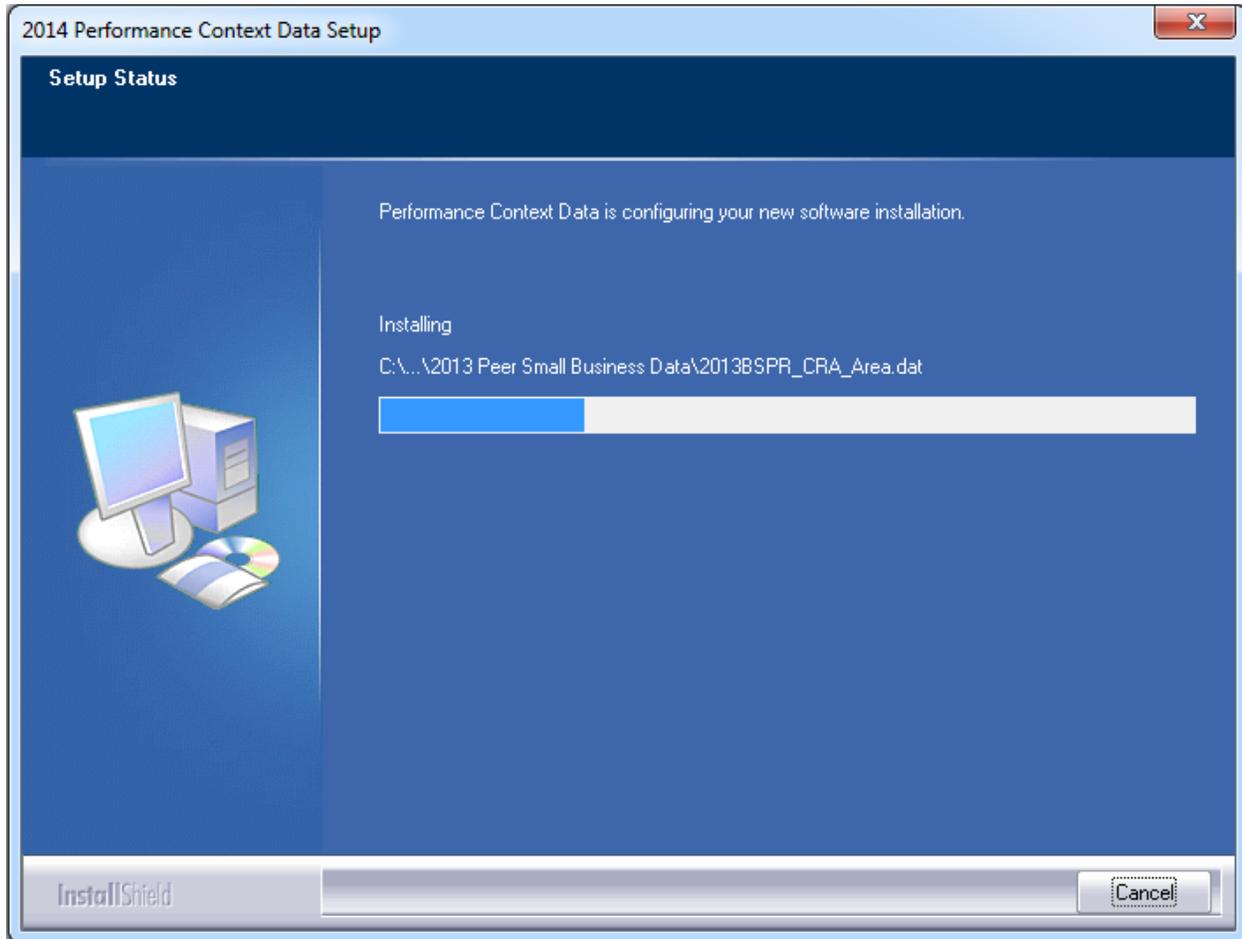
When installation is complete, the installer displays the **Setup Complete** screen.

Setup Complete Screen

Click the **Finish** button:
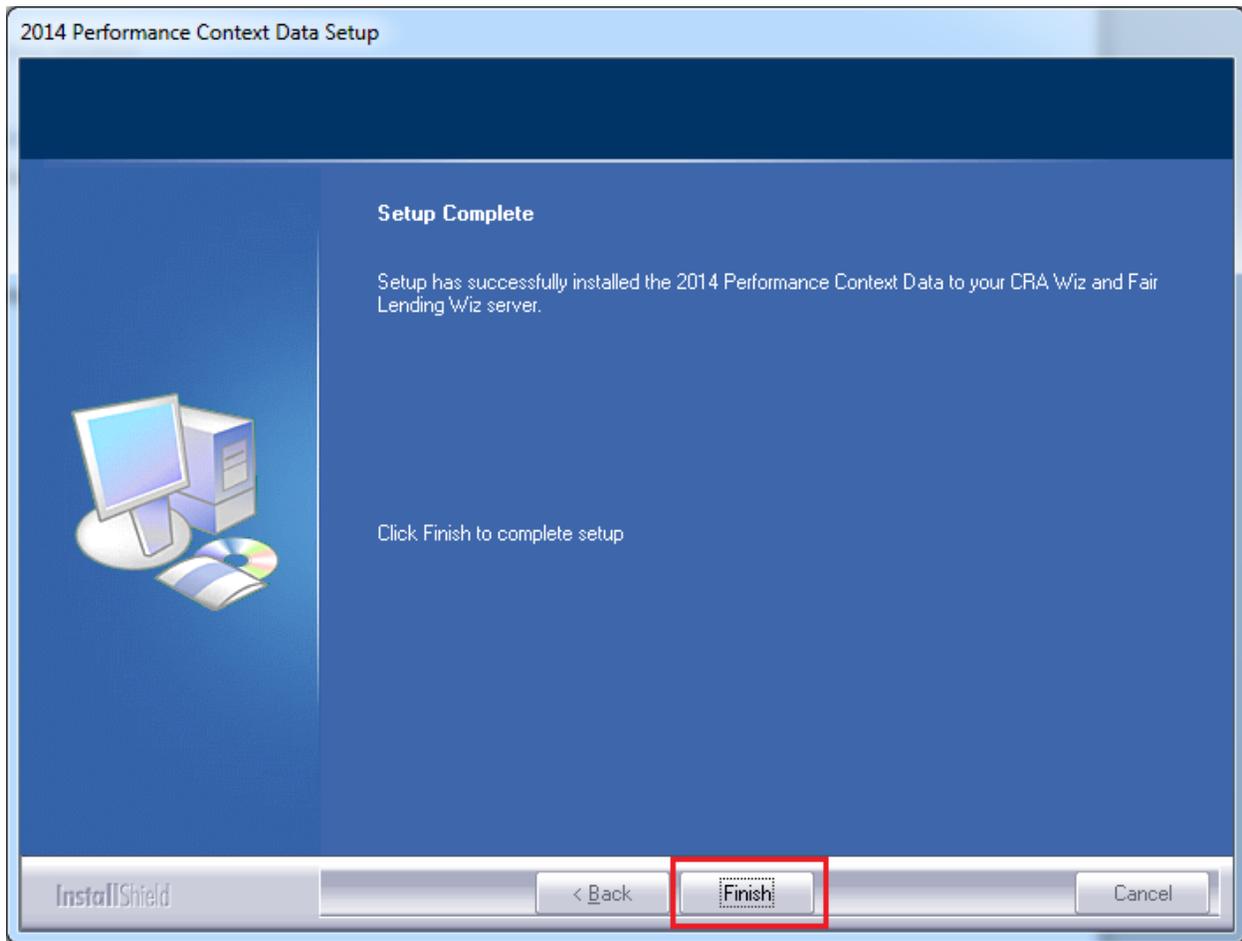
Installation is complete.

Wolters Kluwer
Financial Services

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

800.261.3111