# CRA *Wiz* and Fair Lending *Wiz* 7.1: 2015 Performance Context Data

Release Notes and Installation Instructions Release Date: March 2016



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## **Overview**

The 2015 Performance Context Data installation package allows users to add the following datasets to CRA *Wiz* and Fair Lending *Wiz* with one installation:

- 2014 Peer Branch & Deposit
- 2014 Peer Small Business
- 2015 Business Demographics
- 2015 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* **7.1** 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 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 Minimum of 2.4 GB

Approximate install time 10 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 2015 Performance Context Data, follow these steps:

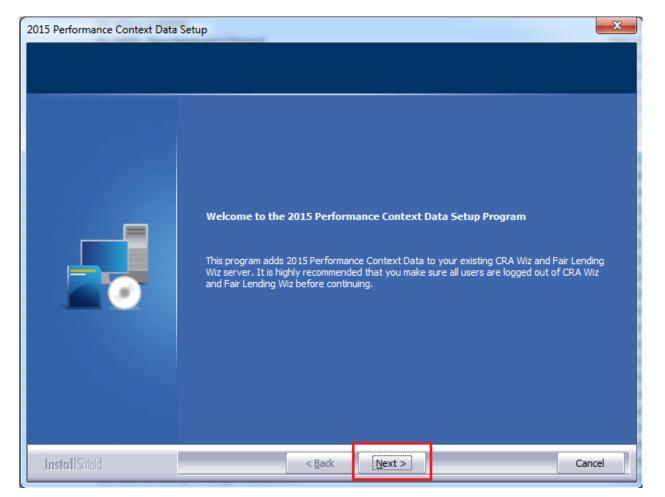
1. After downloading the update, locate and double-click the **2015PerformanceContextData** installation file.

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.

2015 Performance Context Data	Setup 📃 🔀
Database Server Login Select database server and aut	hentication 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:
<b>Install</b> Shield	< <u>B</u> ack <u>N</u> ext > Cancel

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.



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:

2015 Performance Context Data	a Setup
Setup Type Select the setup type to insta	я.
	Please select a setup type.            • Complete             • Clustom             • Custom             • Select which program features you want installed. Recommended for advanced users.
InstallShield	< <u>B</u> ack <u>N</u> ext > Cancel

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 <u>Ready to Install Screen</u> on page 10.



• 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:

2015 Performance Context Data	Setup	×
Select Features Select the options you want t	o install.	
	Select the features you want to install, and deselect the features you do not want to install         ✓ 2014 Peer Small Business Data (US and PR)         ✓ 2015 Business Demographic Data (US and PR)         ✓ 2014 Peer Deposit Data (US and PR)         ✓ 2015 Projected Demographic Data (US and PR)         ✓ 2015 Projected Demographic Data (US and PR)	II.
	Select All	
<b>Instα</b> ∏Shield	< Back Next > Car	ncel

#### 2. Click the **Next** button.

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



## **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:

2015 Performance Context Data	Setup 📃
Choose Destination Folders Choose the locations for the da	tabases and log files
	Setup will install the CRA Wiz databases to the folder below. To install the databases to this folder, click next. To install the databases to a different folder, click Browse and select a different folder. Database Path: C:\Program Files (x86)\Wolters Kluwer Financial Services\CRA Wiz
	Setup also needs to know where you would like to store the database log files. Please specify where the database log files will be stored. Log File Path:
<b>Install</b> Shield	<back< td="">     Next &gt;     Cancel</back<>

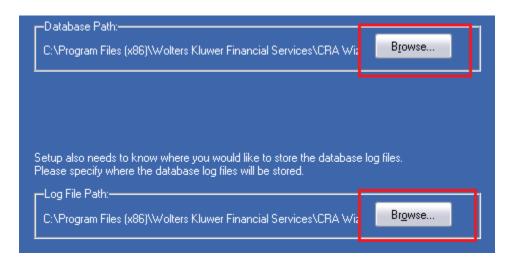
Do one of the following:

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

The software displays the **Ready to Install** screen. For more information, refer to <u>Ready to</u> <u>Install Screen</u> 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:





The software displays the Choose Folder dialog box:

Choose Database Folder
Choose a folder or enter a path below. Path:
C:\
Directories:
Desktop  Desktop  Network  Dibraries  Dibrar
D 2010 Submission Guide - HLP
OK Cancel

- 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:

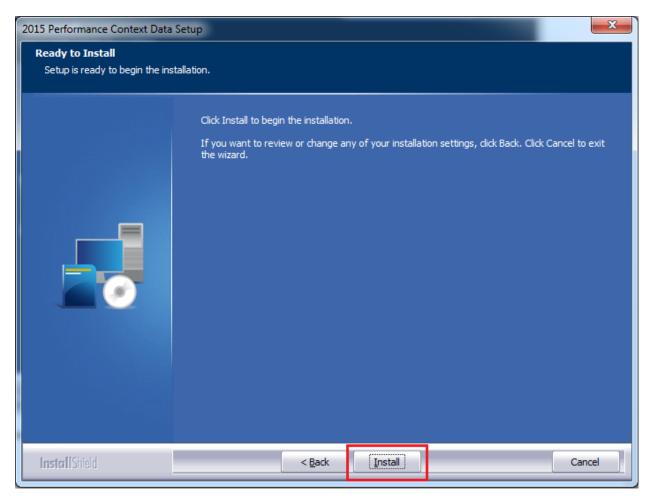


( Back	<u>N</u> ext >	<b></b>	ancel
	<u>N</u> ext >		ancei

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:

2015 Performance Context Data S	Setup	x
Setup Status		
	Performance Context Data is configuring your new software installation.	
	Installing C:\\2014 Peer Small Business Data\2014BSPR_LARData.dat	
InstallShield	Cancel	

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



# Setup Complete Screen

## Click the Finish button:

2015 Performance Context Data S	tup
	Setup Complete
	Setup has successfully installed the 2015 Performance Context Data to your CRA Wiz and Fair Lending Wiz server.
	Click Finish to complete setup
InstallShield	< Back Finish Cancel

Installation is complete.



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