

Consumer Compliance Solutions

# CRA *Wiz* and Fair Lending *Wiz*: 2017 Peer Small Business Data

Release Notes and Installation Instructions

Release Date: October 31, 2018

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## Overview

On October 25th, 2018 the FFIEC released the complete set of 2017 Peer Small Business data. This update allows users to incorporate this data into their CRA *Wiz* reporting and analysis.

### Data source

FFIEC

### Who should install

Any client licensed for Peer Small Business Data should install this update. To determine if you are licensed for Peer Small Business 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***. The appropriate build number is 73.0.39 or higher.

### 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

1.3 GB

### Approximate install time

15 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 Small Business Data** in the **Peer Small Business 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 Small Business Data installer.

## Installation Instructions

To install **2017 Peer Small Business Data**, follow these steps:

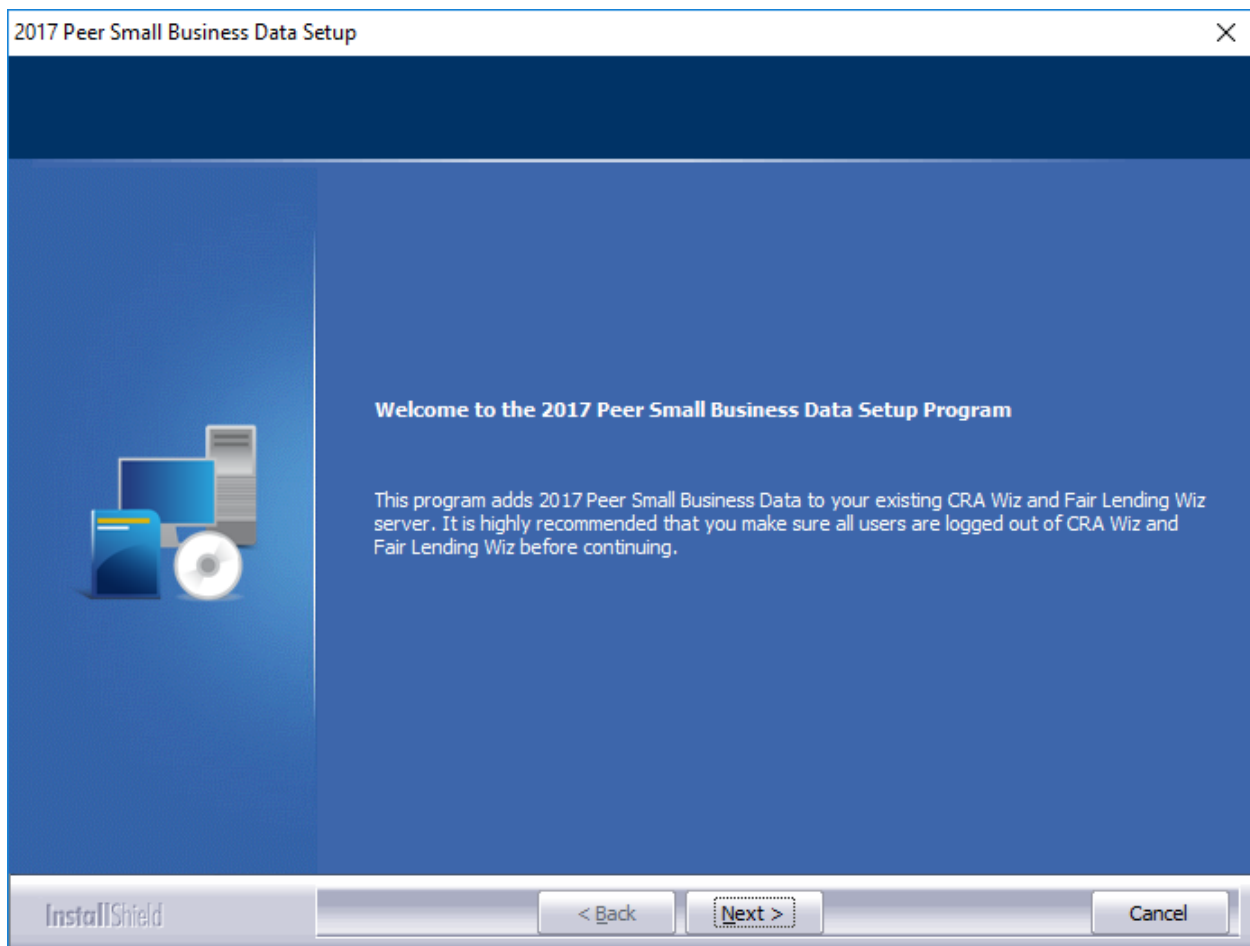
1. After downloading the update locally on your SQL Server, locate and double-click the **2017PeerSmallBusinessData** installation file.

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 as well as the authentication information.

To configure SQL Server options, follow these steps:

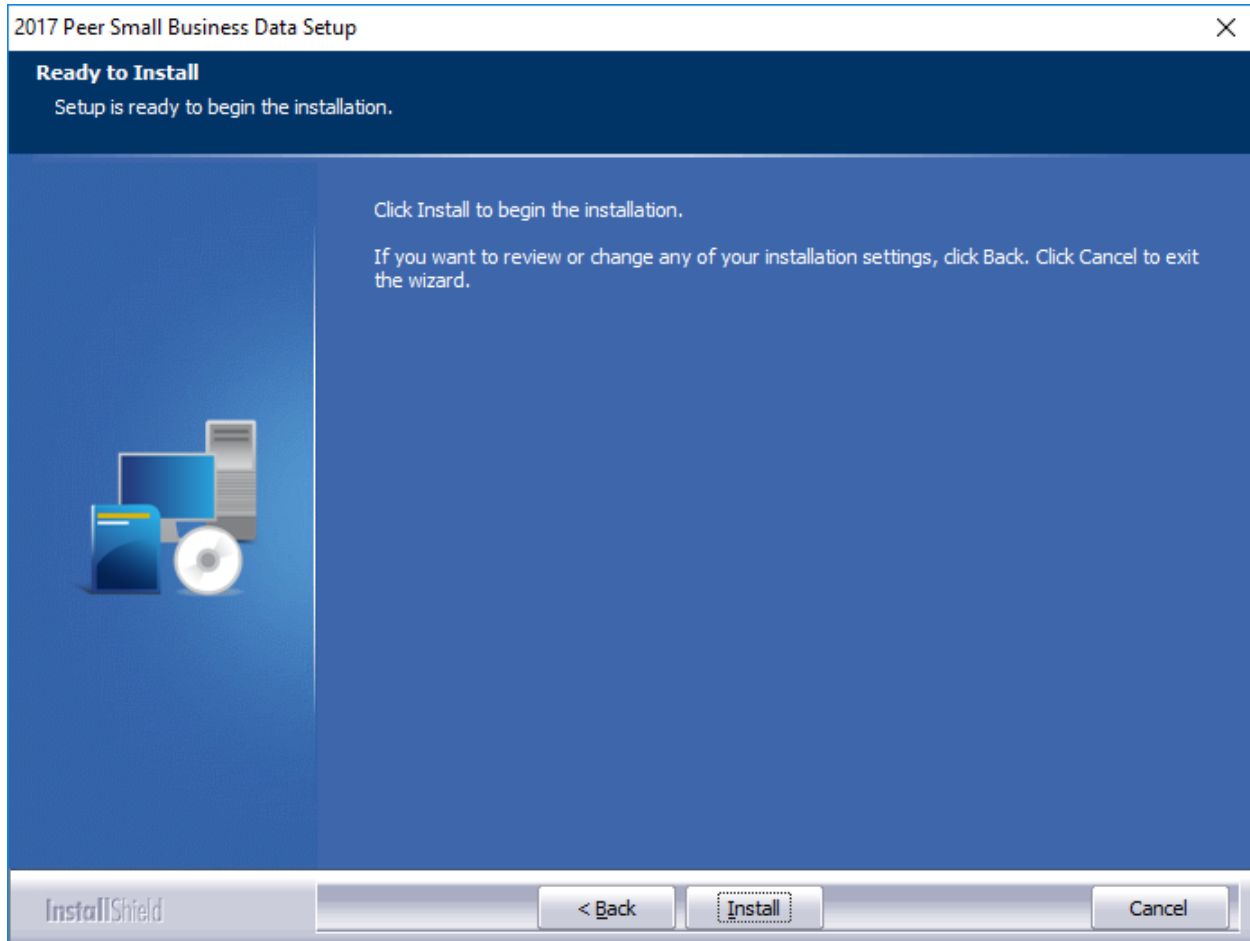
1. Do one of the following:
  - In the **Database server that you are installing to** field, enter the **SQL Server name and instance** to which you are installing the data.  
  
**Example:** SVRBOS01\SQLEXPRESS
  - Click the **Browse** button and in the resultant dialog box, select the SQL Server.
2. 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.

3. Click the **Next** button.

The software displays the **Ready to Install** screen.

## Ready to Install Screen

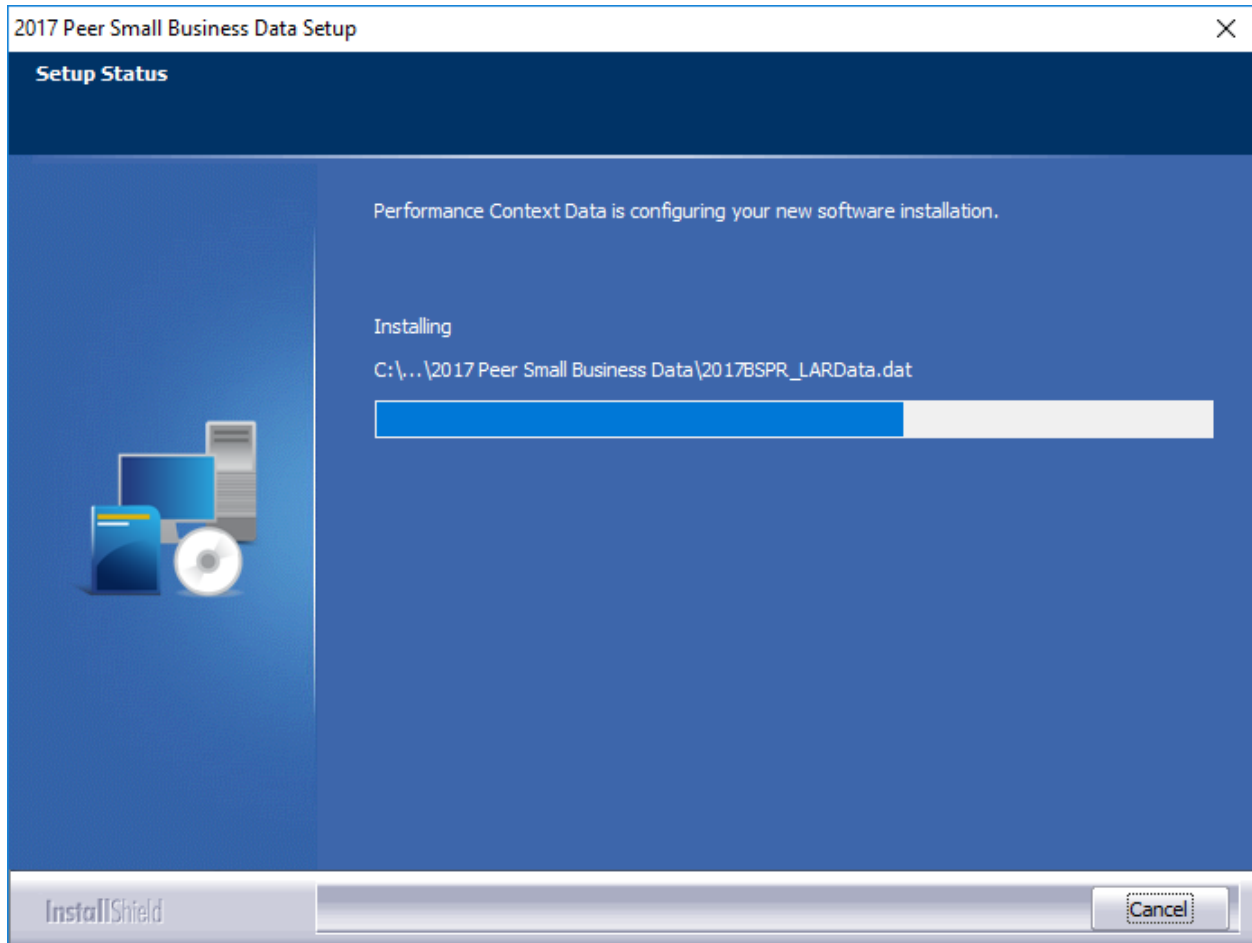
To begin installing the data sets, click the **Install** button:



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

## Setup Status Screen

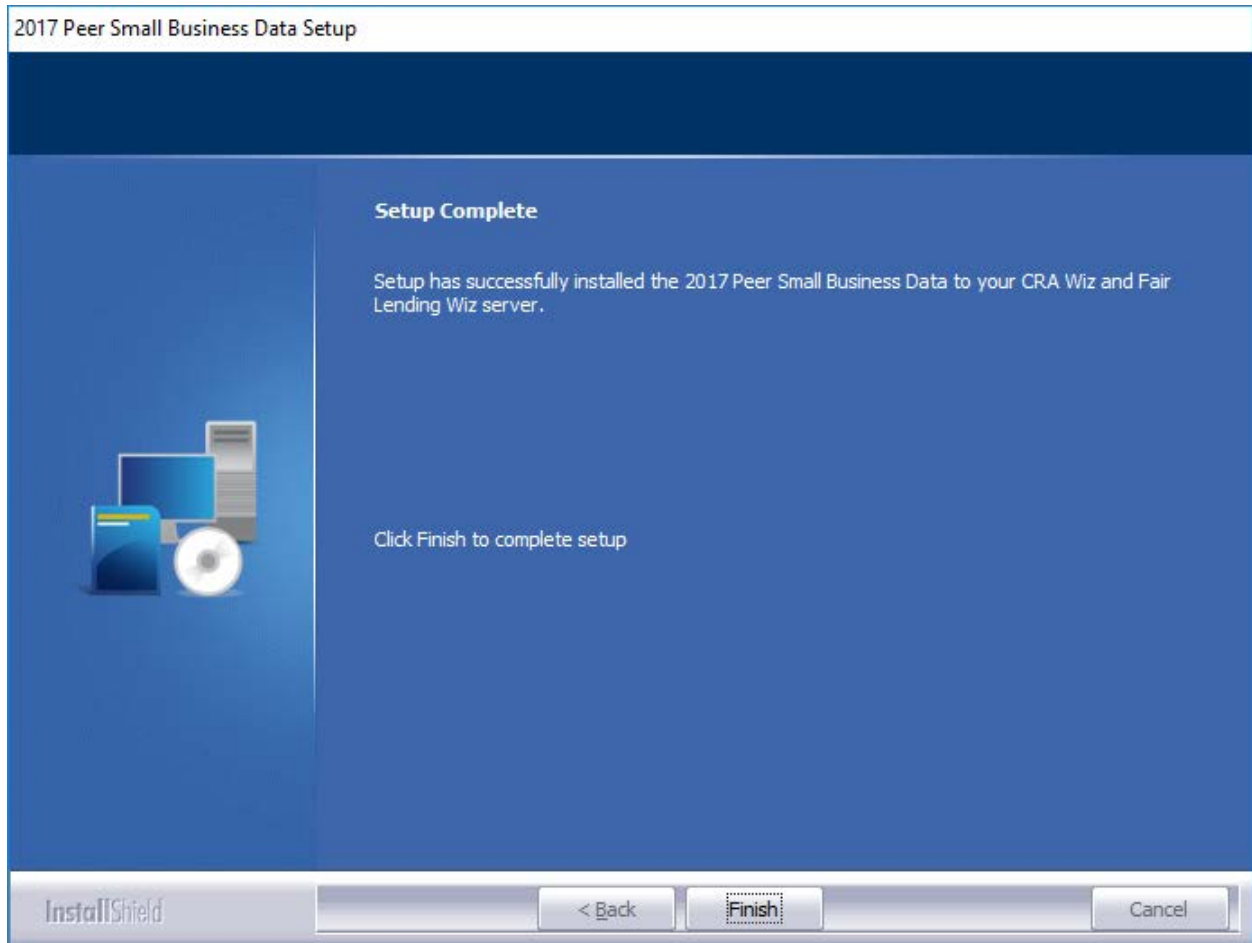
The **Setup Status** screen displays a progress bar that reports the progress of the installation:



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

## Setup Complete Screen

Click the **Finish** button:



Installation is complete.



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