

Installation Instructions and
Release Notes

December 2021

Governance, Risk, & Compliance

CRA *Wiz* and Fair Lending *Wiz*: 2020 Peer Small Business Data

Content

1	Overview	3
1.1	Data source	3
1.2	Who should install	3
1.3	Where to install	3
1.4	Prerequisites	3
1.5	Required permissions	3
1.6	Required free space	3
1.7	Approximate install time	3
1.8	Confirming installation	3
2	Installation Instructions	4
2.1	Welcome Screen	4
2.2	Database Server Login Screen	5
2.3	Ready to Install Screen	6
2.4	Setup Status Screen	7
2.5	Setup Complete Screen	8

1 Overview

On December 21st, 2021 the FFIEC released the complete set of **2020 Peer Small Business data**. This update allows users to incorporate this data into their *CRA Wiz* and *Fair Lending Wiz* reporting and analysis.

1.1 Data source

FFIEC

1.2 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**.

1.3 Where to install

Peer Small Business data should be installed on your *CRA Wiz* and *Fair Lending Wiz* SQL Server **only**.

1.4 Prerequisites

CRA Wiz and Fair Lending Wiz 7.5 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 **75.0.XX or higher**.

1.5 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 recommends that the user running the install have both a Windows admin and SQL Server admin login credentials.

1.6 Required free space

Workstation: 2.2GB (gigabytes)

Server: 2GB (gigabytes)

1.7 Approximate install time

Workstation: 3.5 minutes (approx.)

Server: 4 minutes (approx.)

1.8 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 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 2020 Peer Small Business Data installer.

2 Installation Instructions

To install **2020 Peer Small Business Data**, follow these steps:

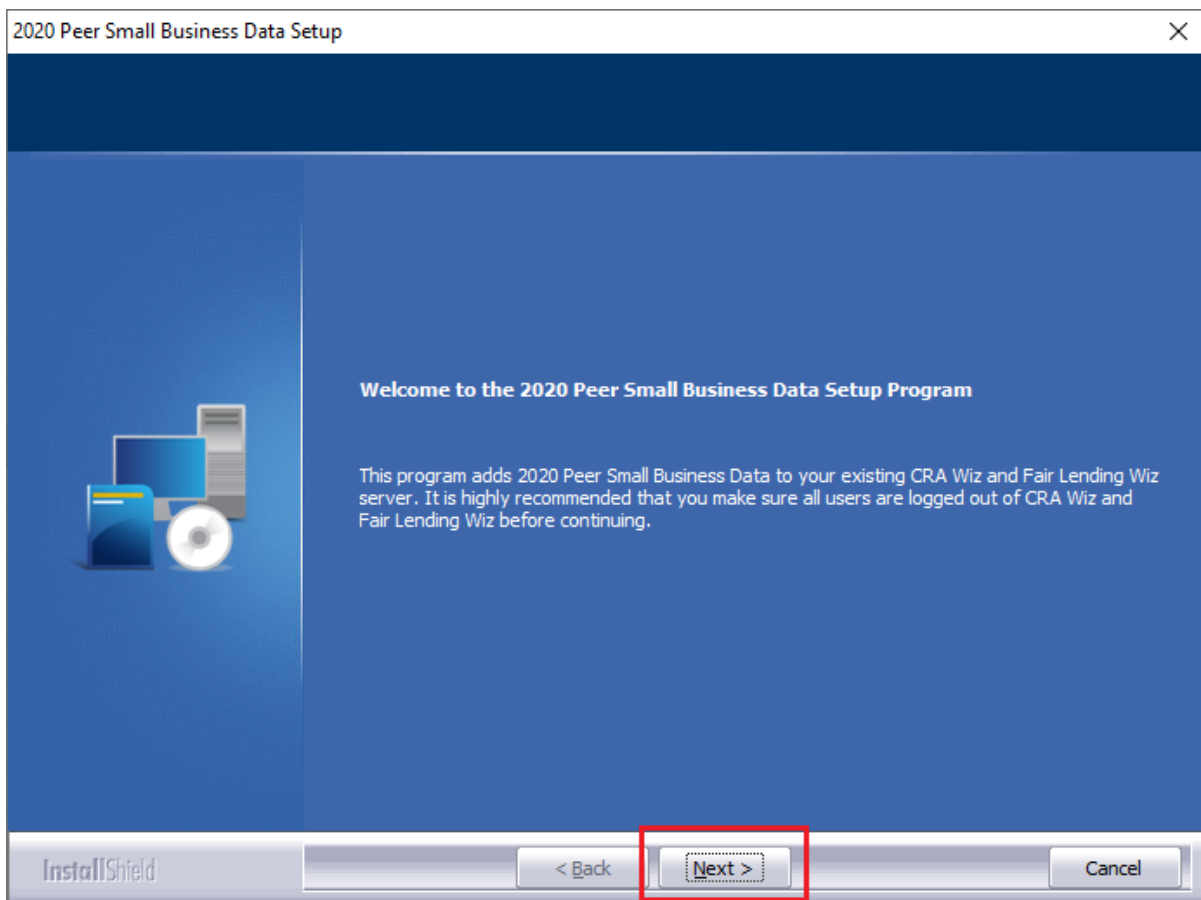
1. After downloading the update locally on your SQL Server, locate and double-click the **2020PeerSmallBusinessData** installation file.

The installer displays the **Welcome** screen.

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

2.1 Welcome Screen

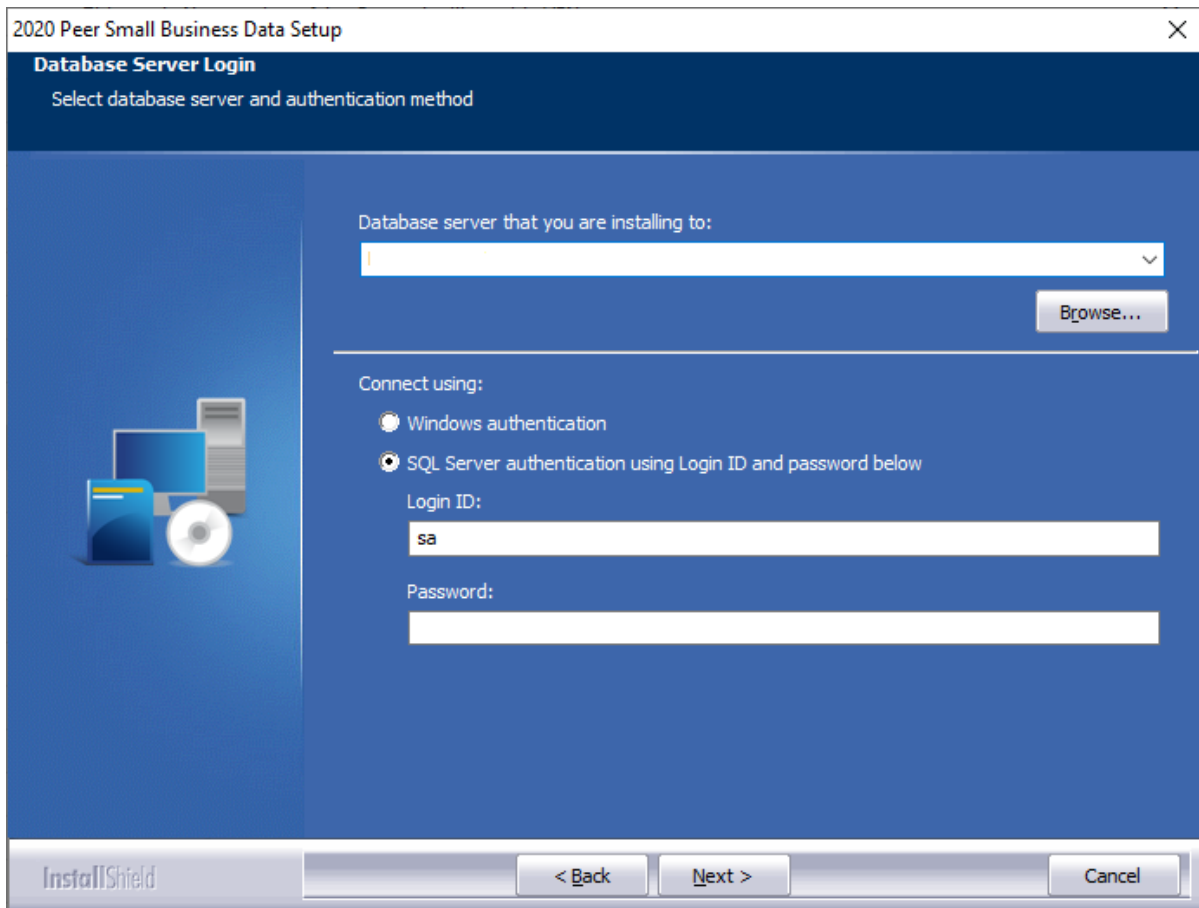
Click the **Next** button:



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

2.2 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:

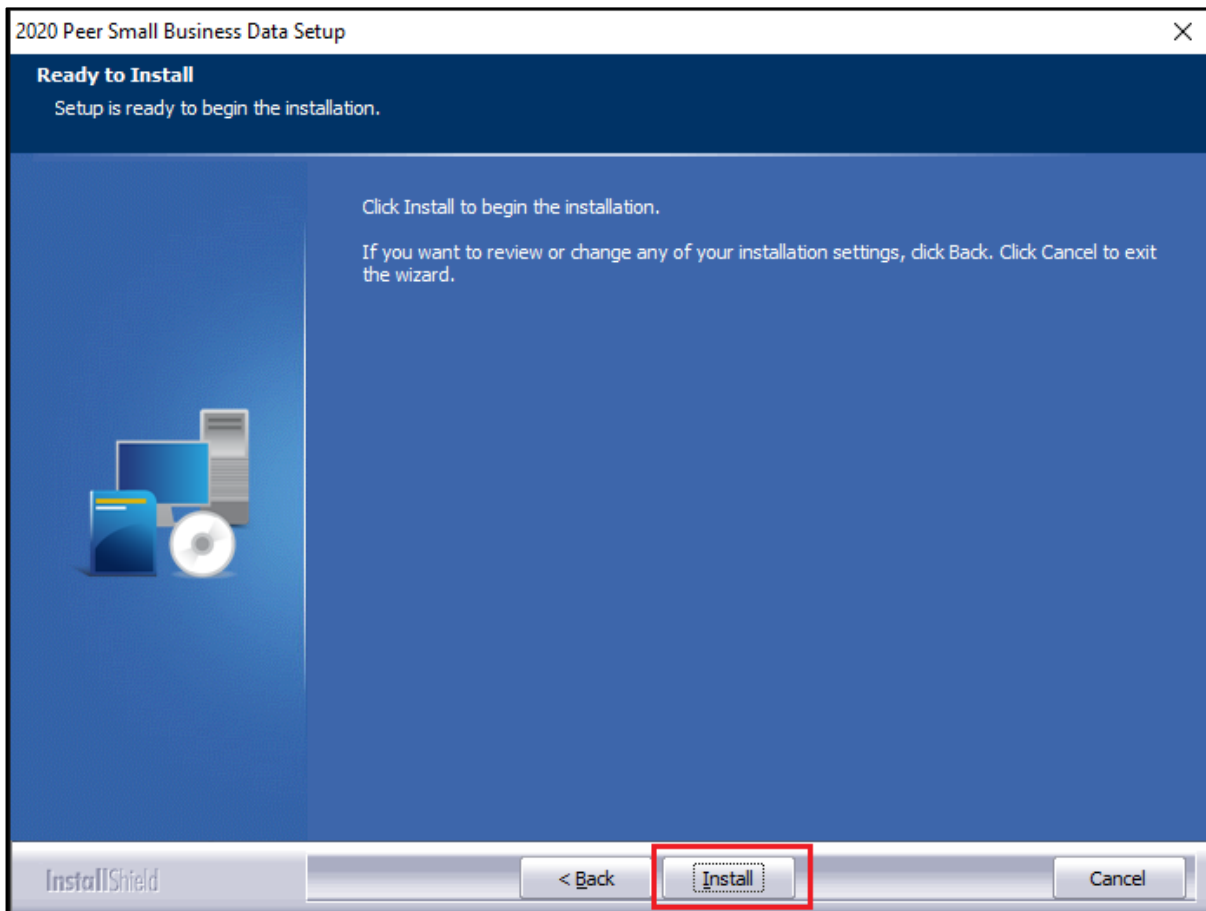
1. Do one of the following:
 - In the **Database server that you are installing to** field, enter the **SQL Server name and instance** to which you are installing the data.

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.

2.3 Ready to Install Screen

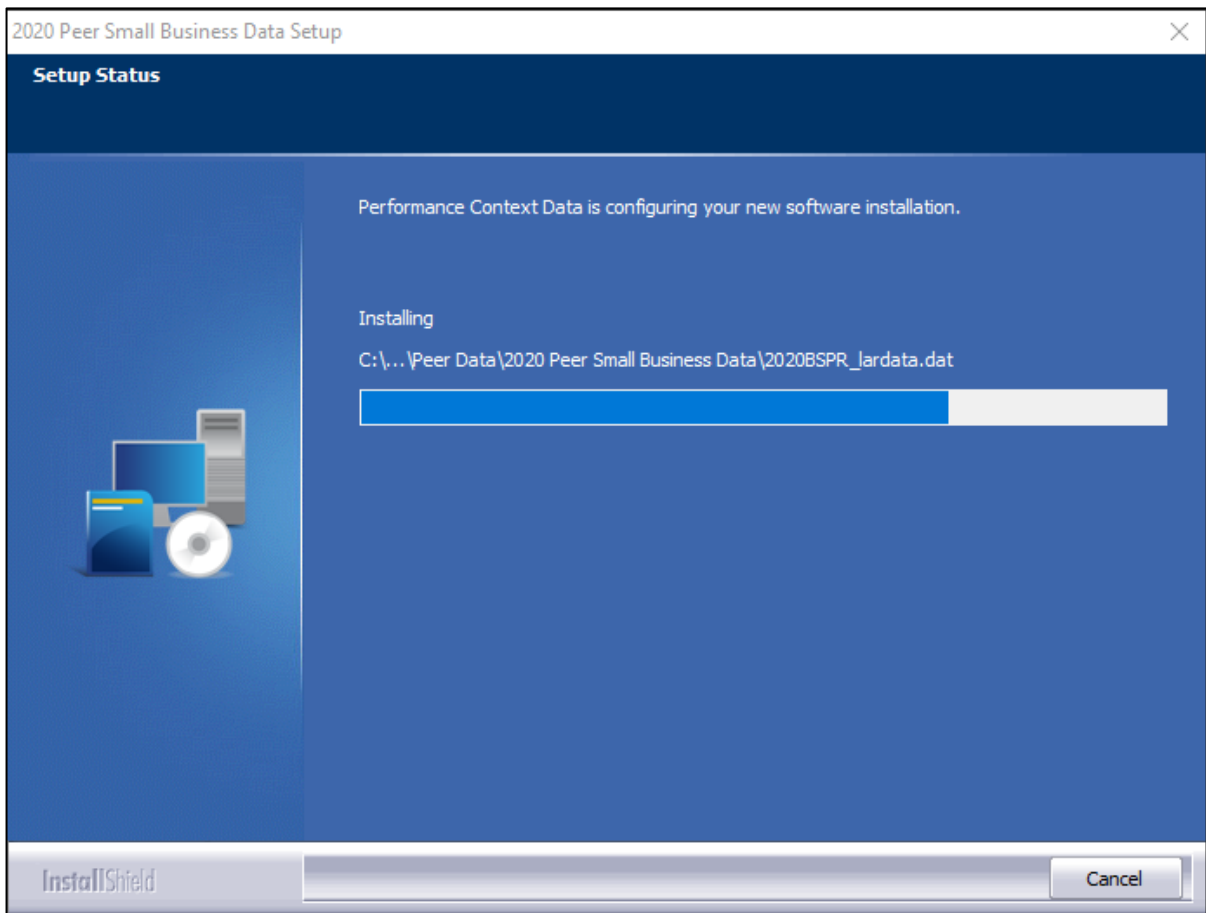
To begin installing the data sets, click the **Install** button:



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

2.4 Setup Status Screen

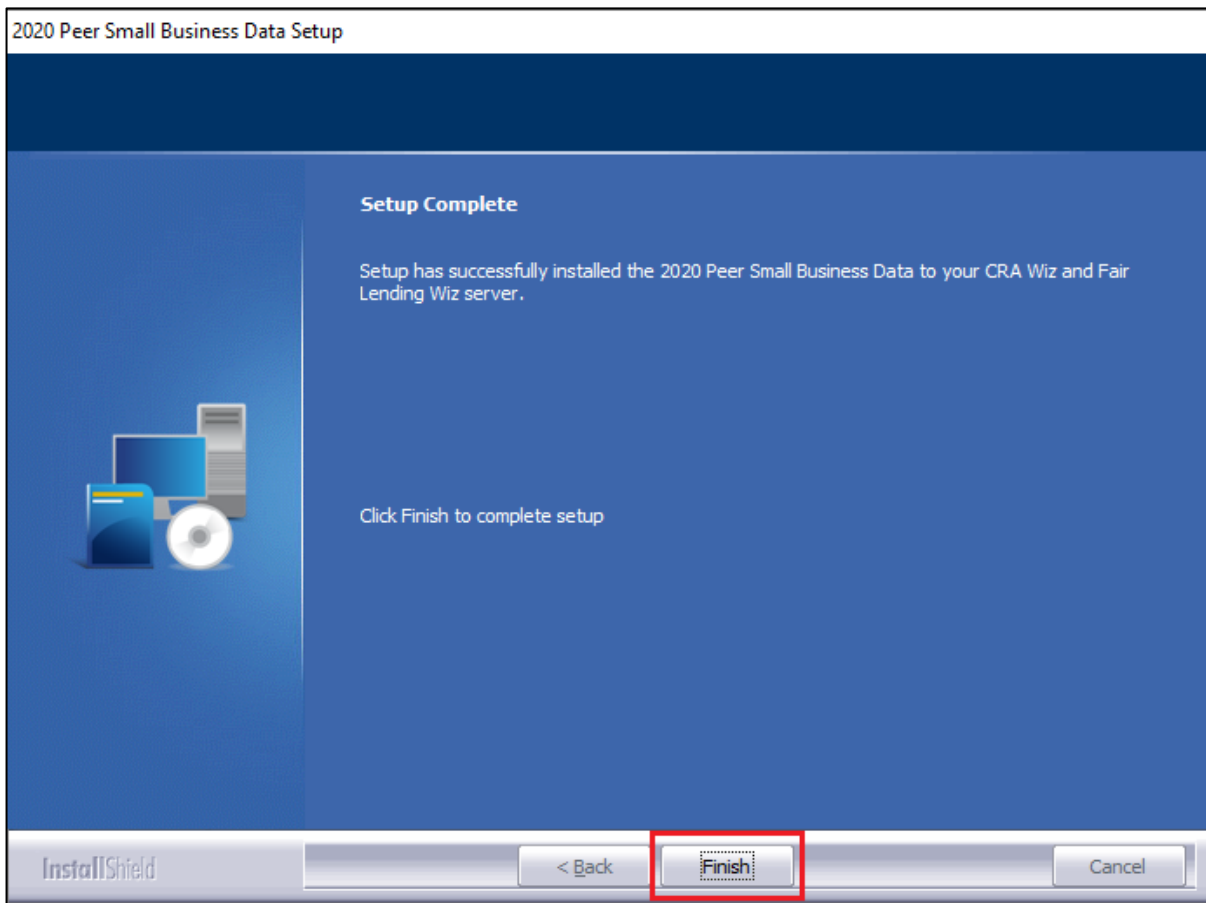
The **Setup Status** screen displays a progress bar that reports the progress of the installation:



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

2.5 Setup Complete Screen

Click the **Finish** button:



Installation is complete.