Wolters Kluwer

Installation Instructions and
Release Notes

December 2023

Governance, Risk, & Compliance

CRA *Wiz* and Fair Lending *Wiz*: 2022 Peer Small Business Data

Content

1 Overview

On December 20th, 2023 the FFIEC released the complete set of **2022 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* 7.7 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 **77.0.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: 3.31 GB (gigabytes)
Server: 3.31 GB (gigabytes)

1.7 Approximate install time
Workstation: 8-10 minutes (approx.)
Server: 8-10 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 **2020**, located in the **Options** menu bar item. The software will then display a file named **2022 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 2022 Peer Small Business Data installer.

2 Installation Instructions

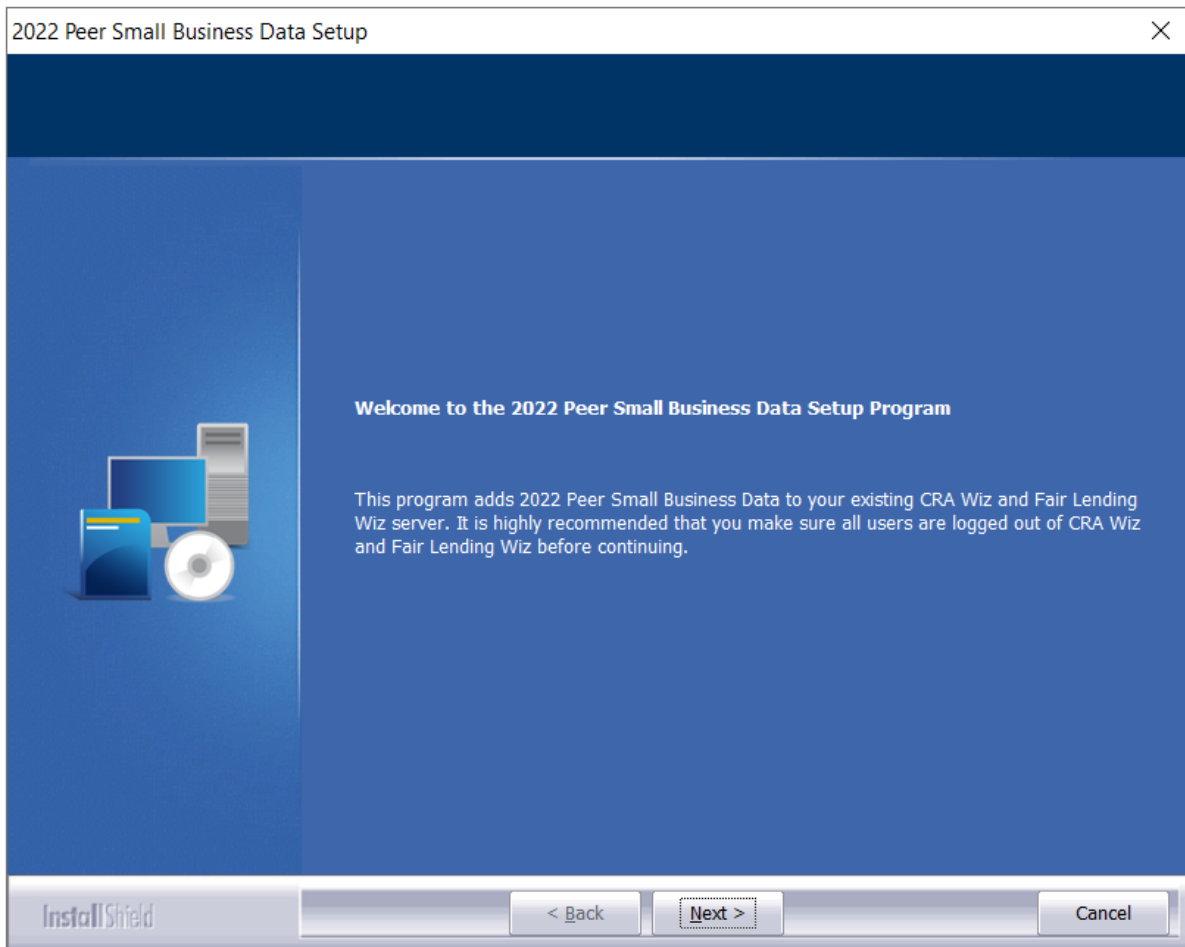To install **2022 Peer Small Business Data**, follow these steps:

1. After downloading the update locally on your SQL Server, locate and double-click the **2022PeerSmallBusinessData** 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.

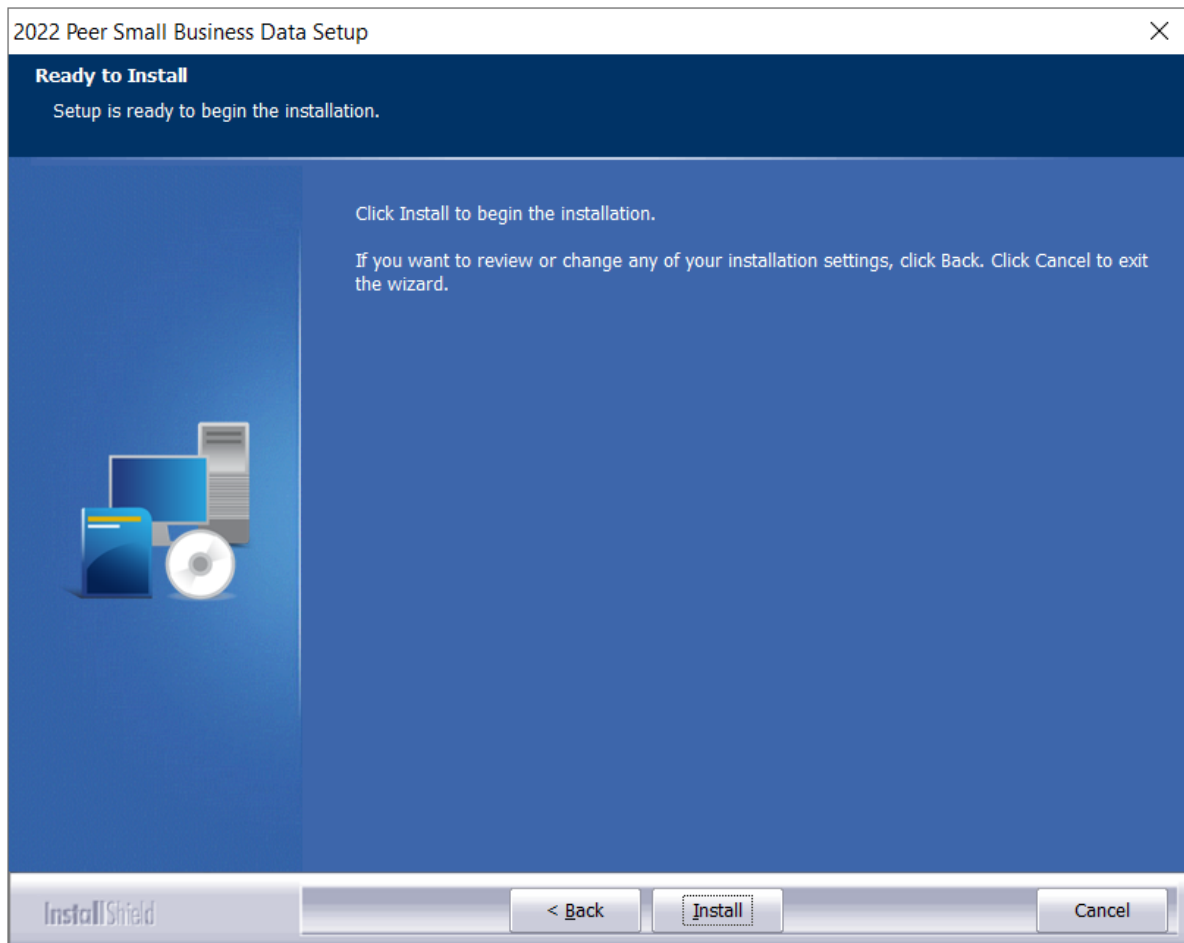To configure SQL Server options, follow these steps:
1. Do one of the following:
    - In the **Database server that you are installing to** field, enter the **SQL Server name and instance** to which you are installing the data.

        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.
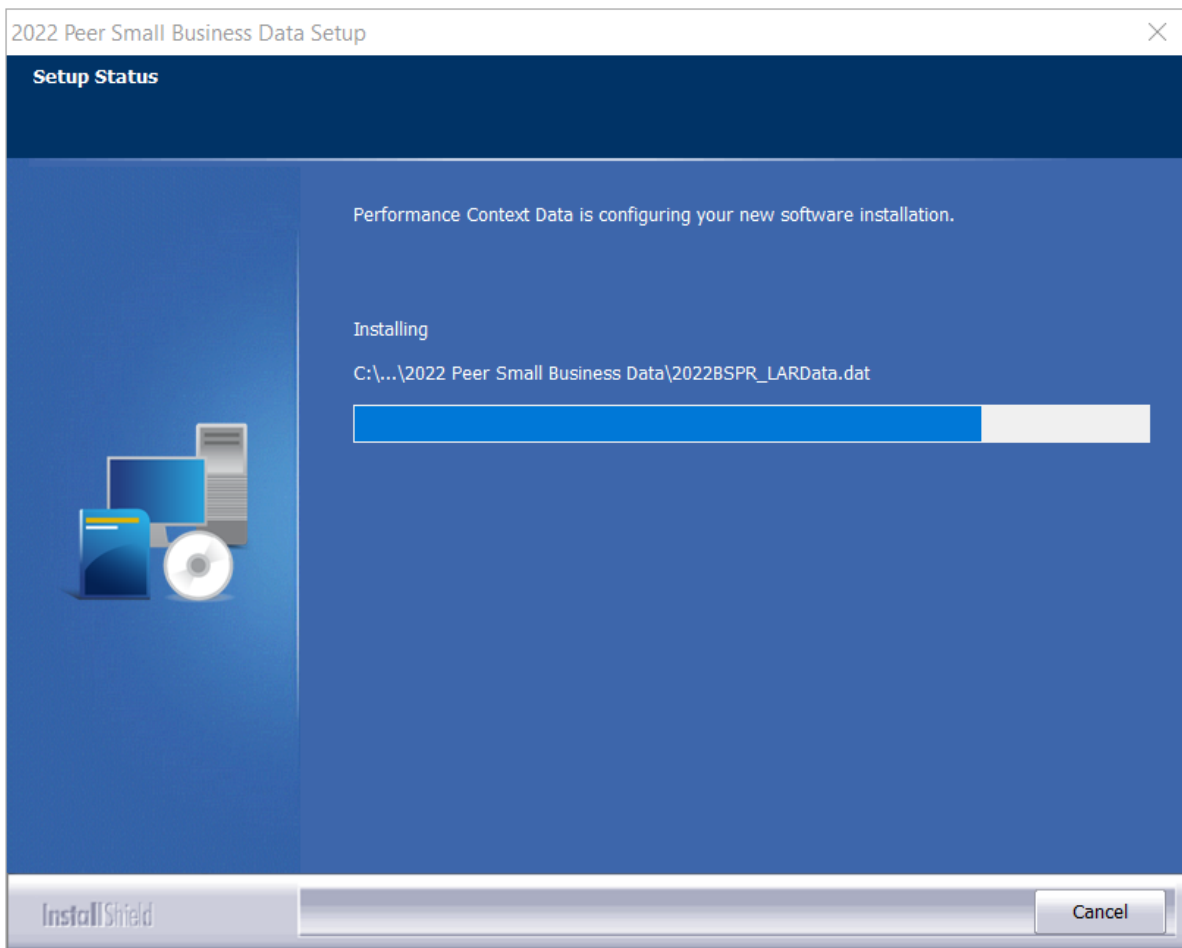
2.3 Ready to Install Screen

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

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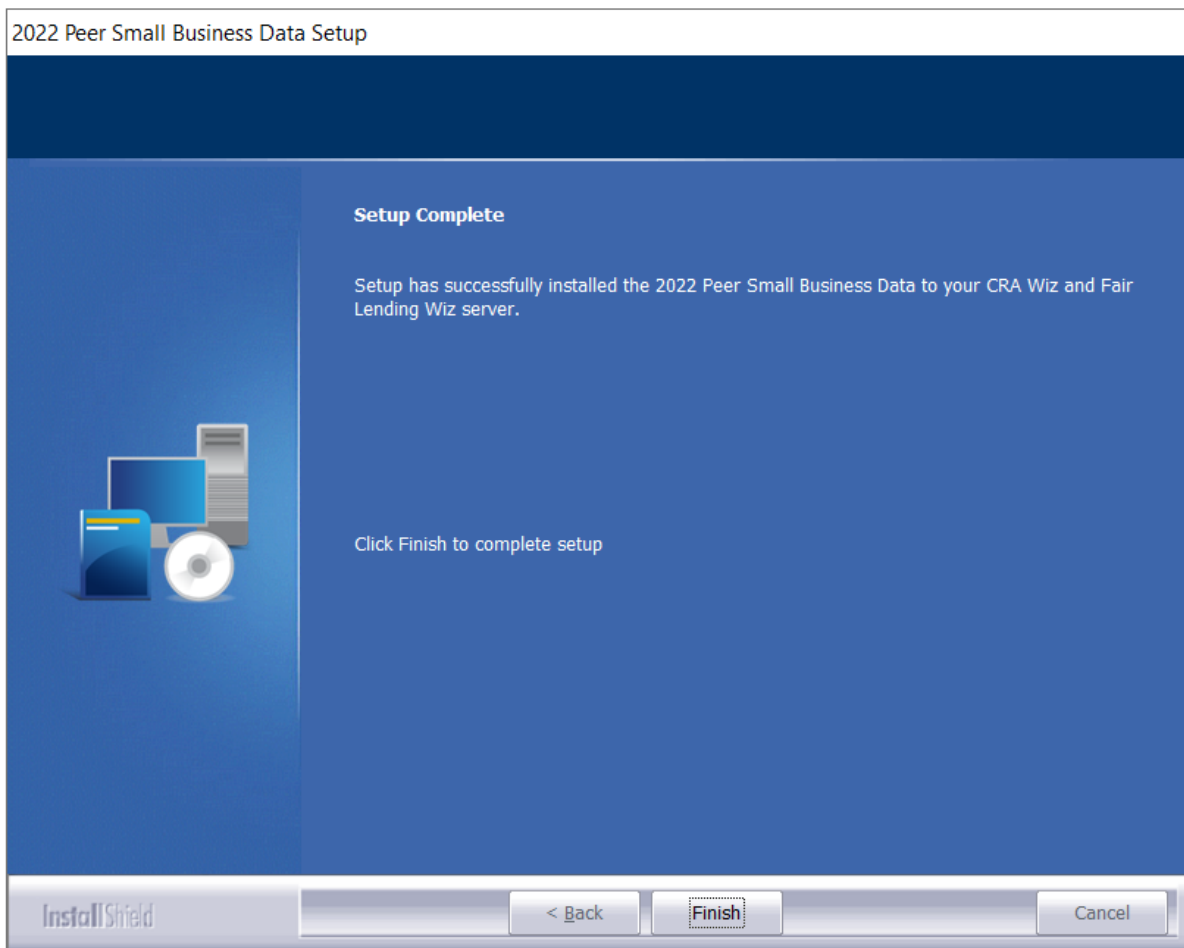
2.4　Setup Status Screen

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.

You can verify the install was successful by viewing the Peer Small Business Data is present:

Filter ▽

- ⊞ File Manager
  - ⊟ 📁 Bank Data
    - 📁 Mortgage
    - 📁 Mortgage 2004
    - 📁 Mortgage DF
    - 📁 Small Business and Farm
    - 📁 Consumer
    - 📁 Auto
    - 📁 Deposit
    - 📁 Other
    - 📁 Small Business Farm and Consumer
  - ⊟ 📁 Peer Data
    - 📁 Peer Mortgage Data
    - 📁 **Peer Small Business Data**
    - 📁 Branch and Deposit Data

📄 2022 Peer Small Business Data -- US and PR

File Manager

**Peer Small
Business
Data**

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