



Consumer Compliance Solutions

# CRA *Wiz* and Fair Lending *Wiz* 6.9: 2013 Peer Mortgage Data

Release Notes and Installation Instructions

Release Date: October, 2014

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## Overview

On September 22<sup>nd</sup>, the FFIEC release the complete set of 2013 HMDA submission data. This update allows users to incorporate peer data into their CRA *Wiz* reporting and analysis.

### Data source

[FFIEC HMDA data collection](#)

### Who should install

Any client licensed for Peer Mortgage Data should install this update. To determine if you are licensed for Peer Mortgage Data, go to the **System Maintenance** screen and select **License and Access Management**.

### Prerequisites

**CRA *Wiz* and Fair Lending *Wiz* 6.9 or 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 "69" or "70" are acceptable.

### 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

Approximately **15 GB** during install to allow for log growth, depending on SQL server settings  
The completed install adds approximately **3 GB**, depending on SQL server settings

### Approximate install time

**30 minutes** (full US dataset)

**1 hour** (regional datasets)

### 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 **2013 Peer Mortgage Data** in the **Peer Mortgage 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 2013 Peer Mortgage Data installer.

## Notable changes

In an effort to streamline our process and release the Peer Mortgage dataset more quickly in the future, some changes have been made to this year's installation package. These changes allow for easy distribution through the *Wiz* Web Center and packaging with the Performance Context Data Update later this year. Please make note of the following:

- There are two known issues with this release that will be resolved when the 2014 HMDA data is released.
  - **Install time** – Because of the way the install is constructed, the regional datasets take significantly longer than the full US dataset. See Approximate Install Time above.
  - **Required free space** – An unanticipated result of the changes to the install package was an increase in required free space. During install, the logs and setup files can grow up to 15 GB. This space is freed back to the operating system once the install is completed.
- **File Management** – The structure of the regional datasets has changed slightly. Where previously this data would appear as two or three files in File Management, it will now appear as one consolidated file.
- **Cross-regional MSAs** – Peer Mortgage data for cross-regional MSAs is now fully included in any dataset region the MSA touches.

For example, MSA 32820 covers Tennessee and Mississippi (Southeast region) and Arkansas (Southwest region). All data from 32820 will be included in both the Southeast and Southwest regional datasets. Previously, only the TN and MS data would be included in Southeast region and the AR data in Southwest.

## Installation Instructions

To install 2013 Peer Mortgage Data, follow these steps:

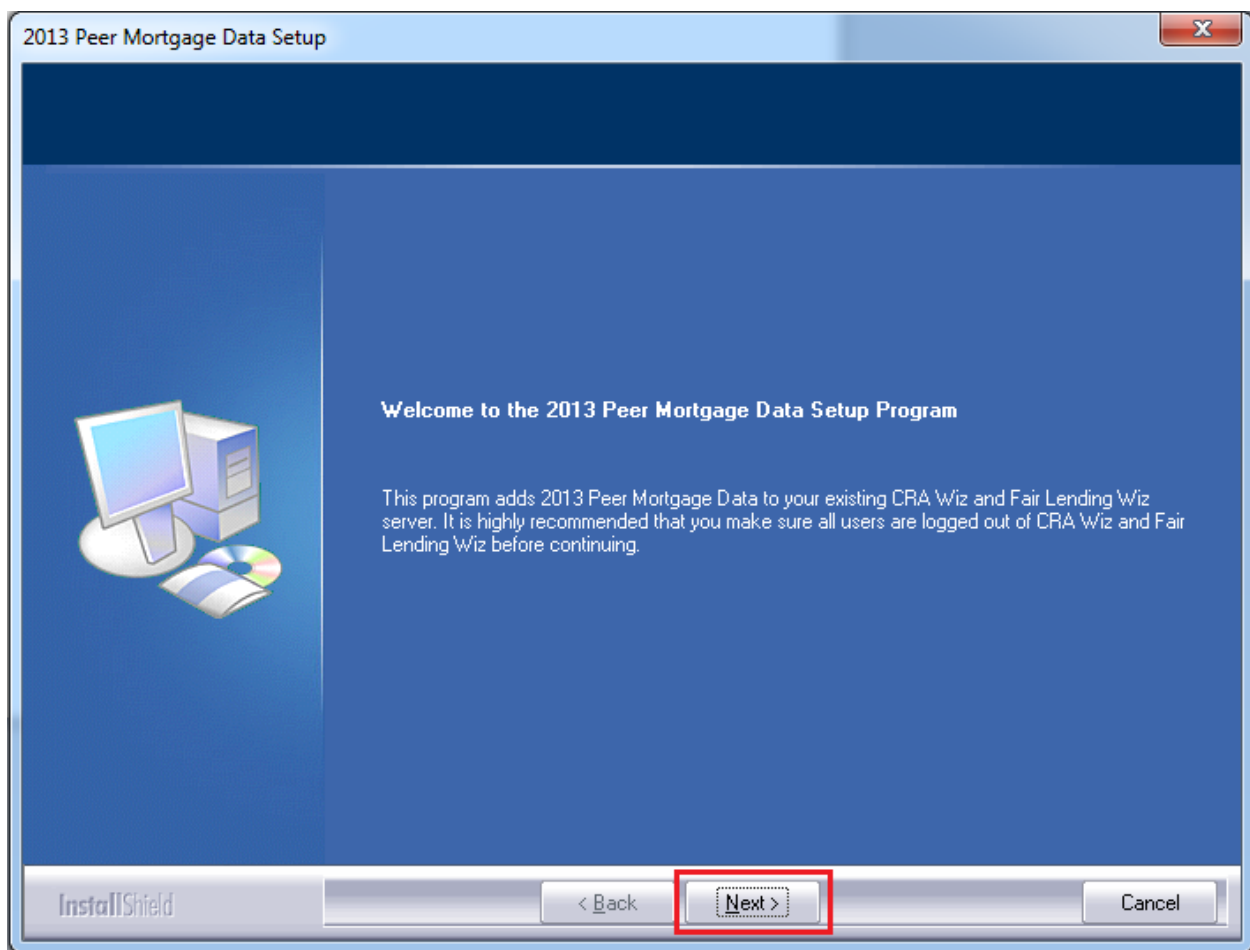
1. After downloading the update, locate and double-click the **2013PeerMortgageData** installation file.

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:

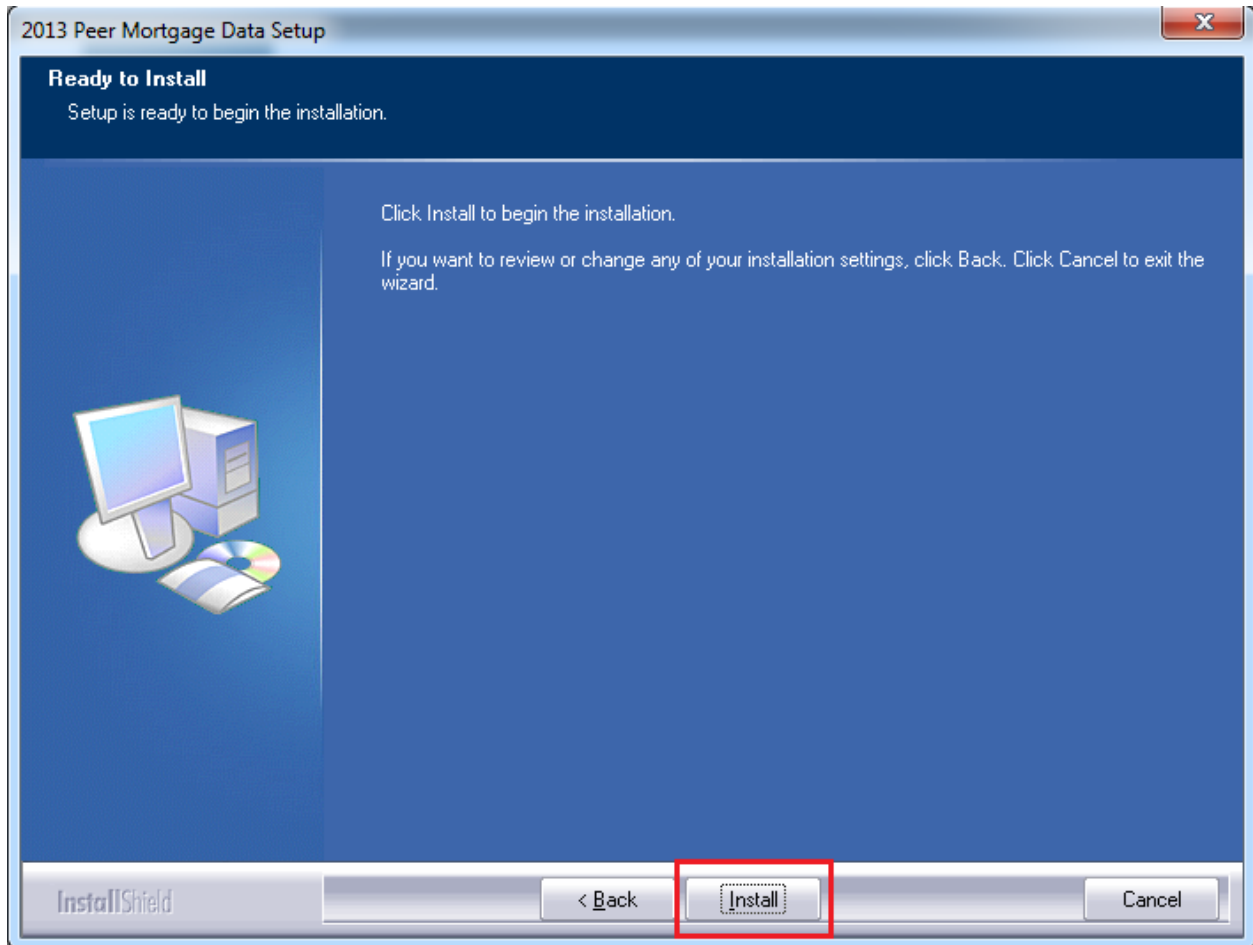
1. Do one of the following:
  - In the **Database server that you are installing to** field, enter the **SQL Server name and instance** to which you are installing the data.  
  
**Example:** SVRBOS01\SQLEXPRESS
  - Click the **Browse** button and in the resultant dialog box, select the SQL Server.
2.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

3. Click the **Next** button.

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

## Ready to Install Screen

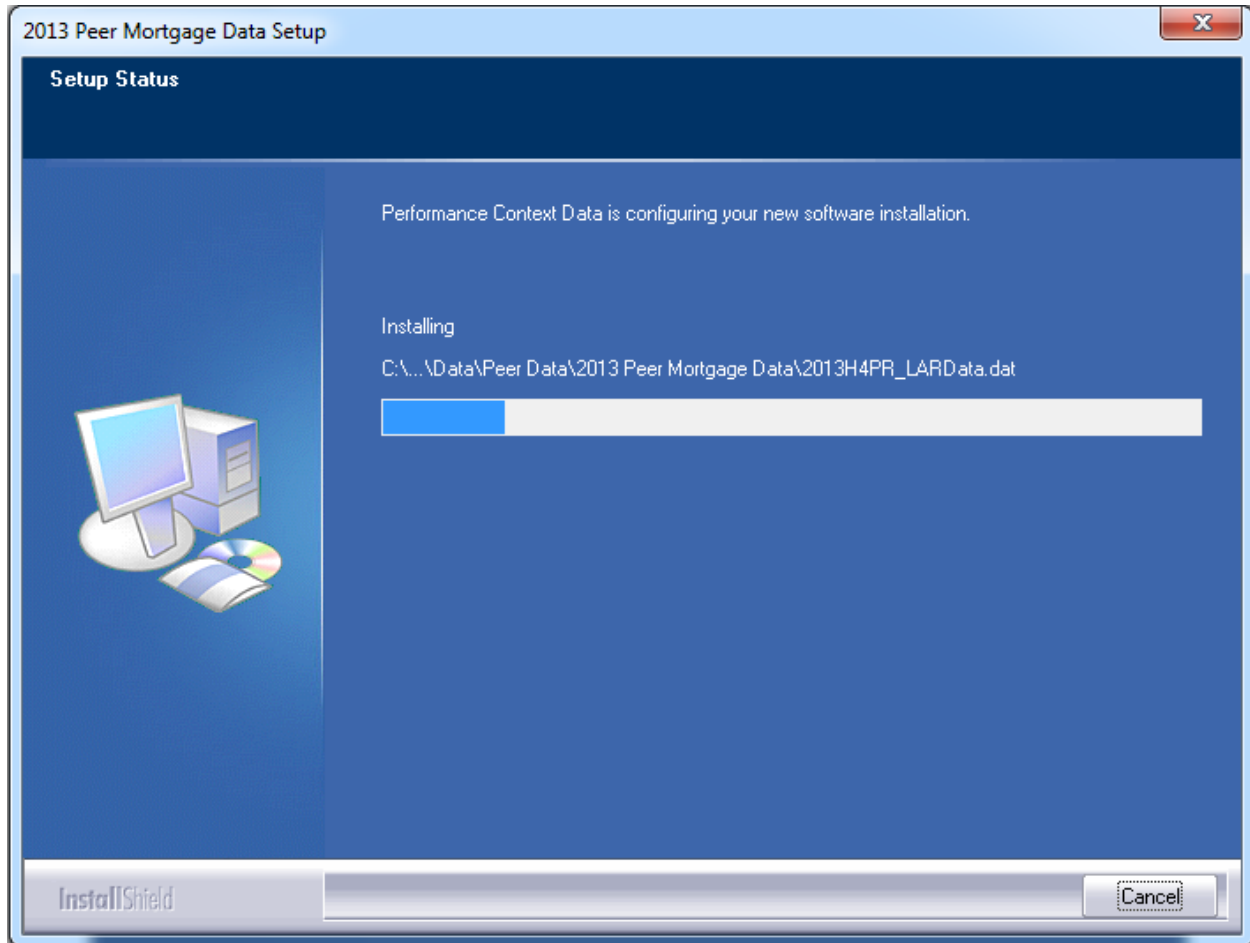
To begin installing the data sets, click the **Install** button:



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:

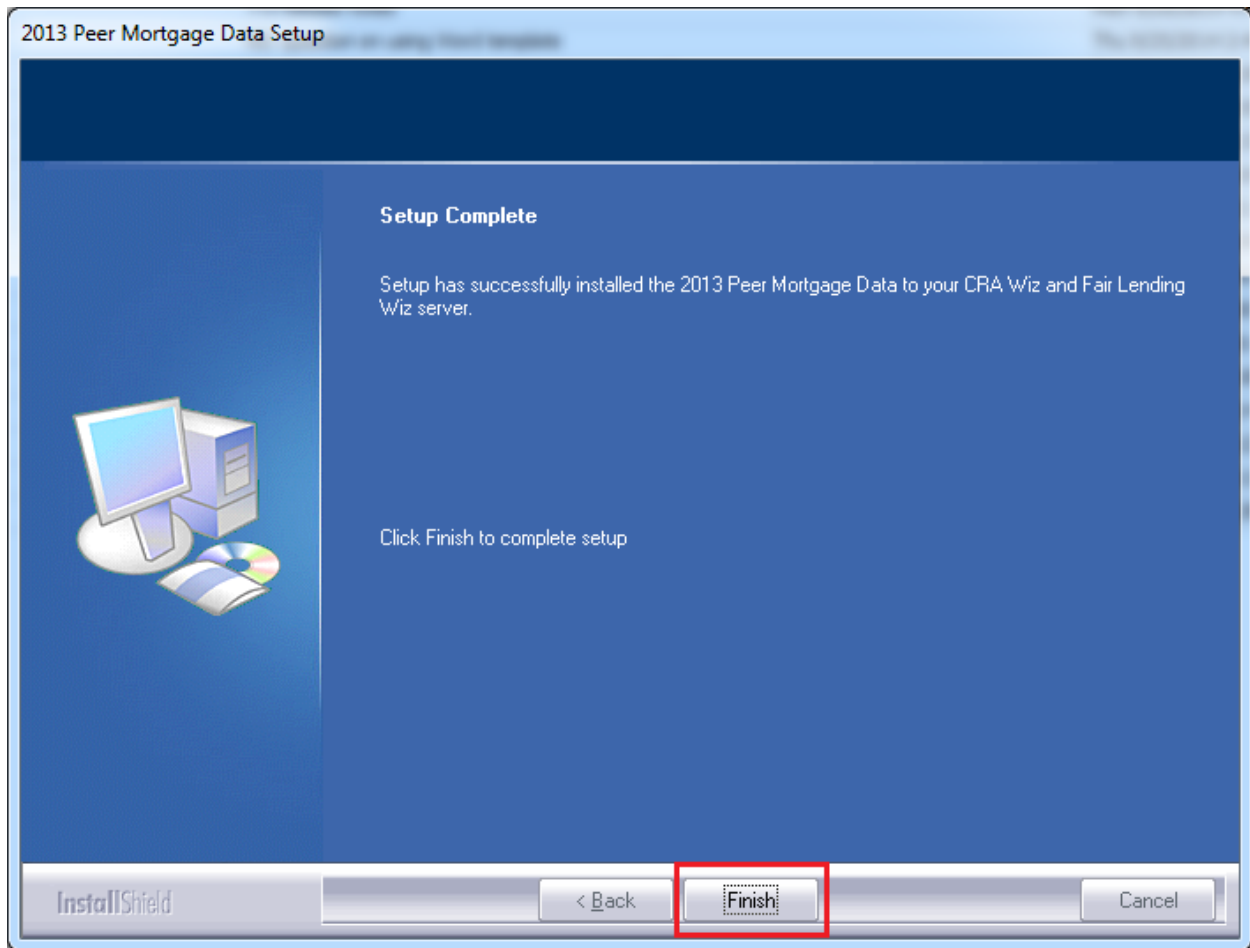


When installation is complete, the installer displays the **Setup Complete** screen.



## Setup Complete Screen

Click the **Finish** button:



Installation is complete.

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