

Installation Instructions and  
Release Notes

July 2020

Governance, Risk & Compliance

# CRA *Wiz* and Fair Lending *Wiz*: 2019 Peer Mortgage Data - FINAL

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# 1 Overview

On June 24th, 2020, The Federal Financial Institutions Examination Council (FFIEC) posted the final release of the 2019 Snapshot on Mortgage Lending.

The data include a total of 48 data points providing information about the applicants, the property securing the loan or proposed to secure the loan in the case of non-originated applications, the transaction, and identifiers. This update allows users to incorporate this data into their CRA Wiz and Fair Lending Wiz reporting and analysis.

This release of the data contains **17,545,457** records from **5,508** institutions.

## 1.1 Data source

[FFIEC / CFPB HMDA Snapshot](#)

## 1.2 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**.

## 1.3 Prerequisites

**CRA Wiz and Fair Lending Wiz 7.4 (Build 74.0.28) or higher 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 "74.XX" are acceptable.

**Important!** For client/server environments, Peer Mortgage data is installed on the **SQL Server only**.

## 1.4 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.

## 1.5 Required free space

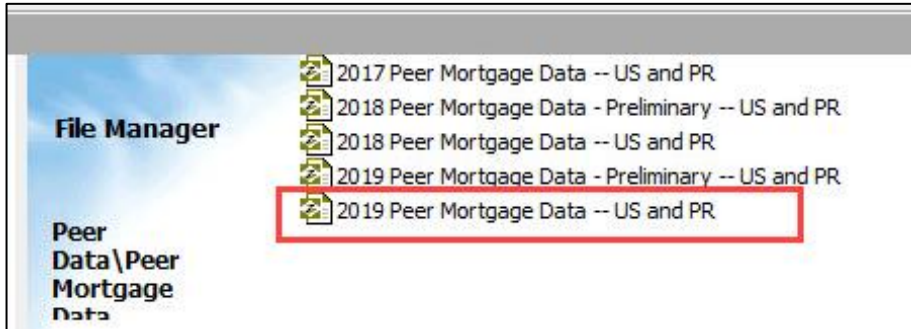
10 GB (recommended)

## 1.6 Approximate install time

10 minutes, depending on hardware configuration and specifications.

## 1.7 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 **2019 Peer Mortgage Data – US and PR** 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 2019 Peer Mortgage Data installer.

## 2 Installation Instructions

To install **2019 Peer Mortgage Data – Final**, follow these steps:

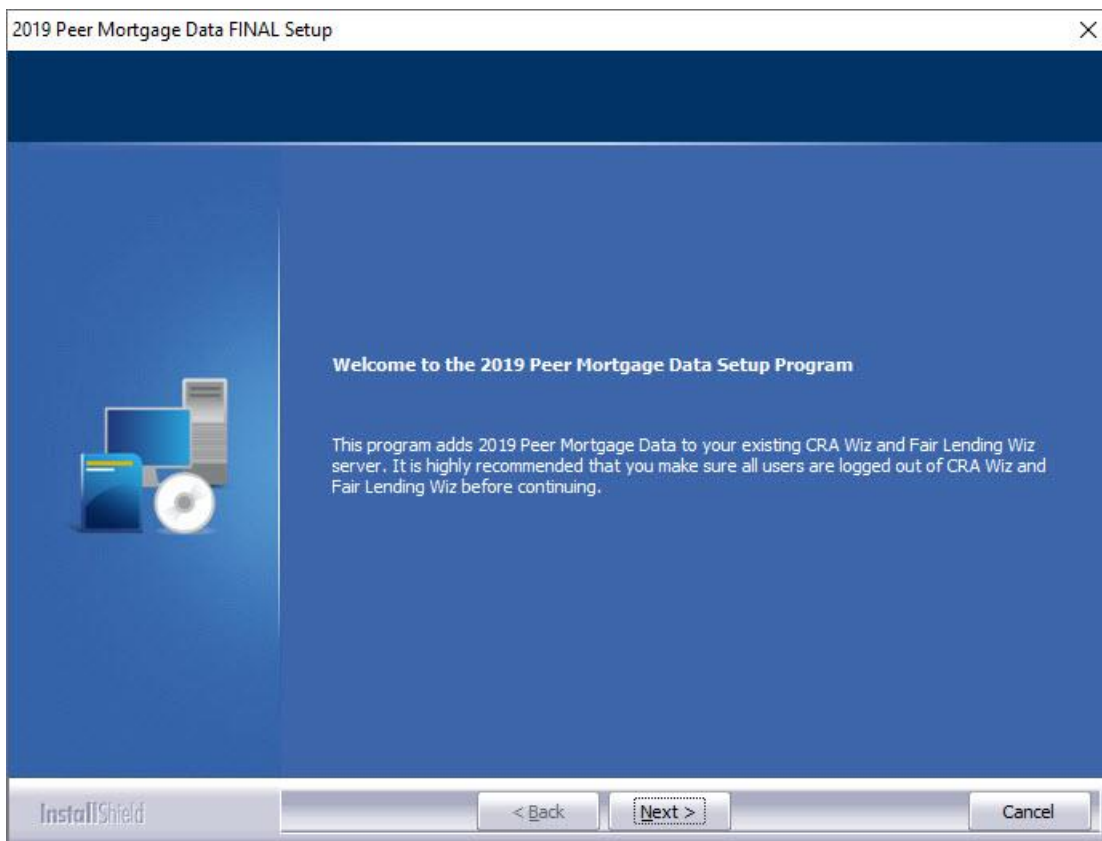
1. After downloading the update locally onto the SQL Server where CRA *Wiz* and Fair Lending *Wiz* is installed, locate and double-click the **2019PeerMortgageDataFinal** installation file.

The installer displays the **Welcome** screen.

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

### 2.1 Welcome Screen

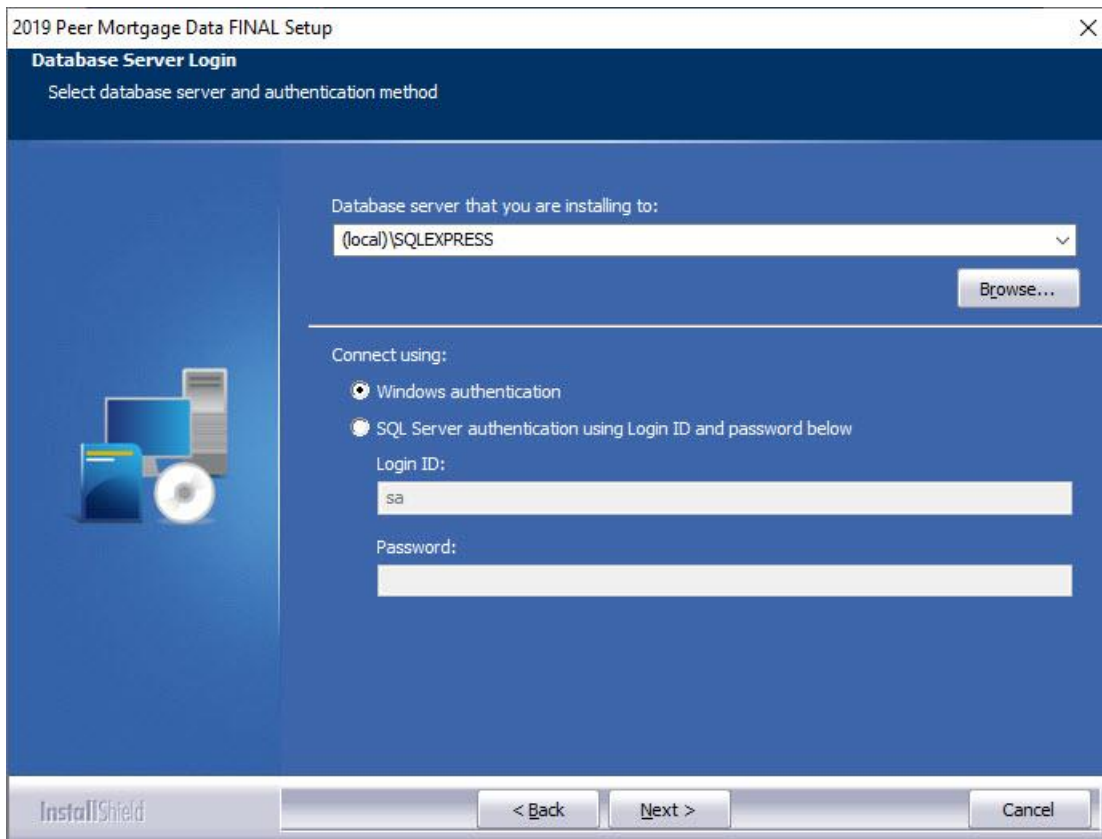
Click the **Next** button:



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 your authentication settings:



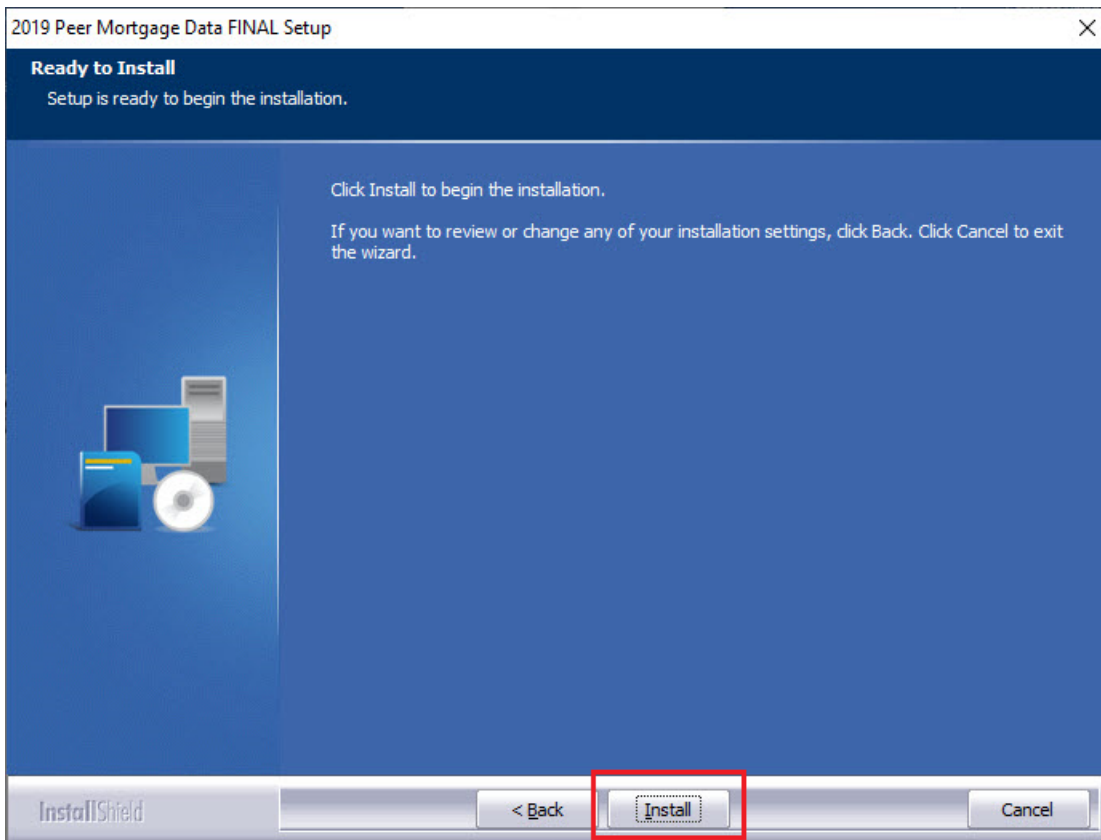
To configure SQL Server options, follow these steps:

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 **Login ID** and **Password** fields.
3. Click the **Next** button.

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

## 2.3 Ready to Install Screen

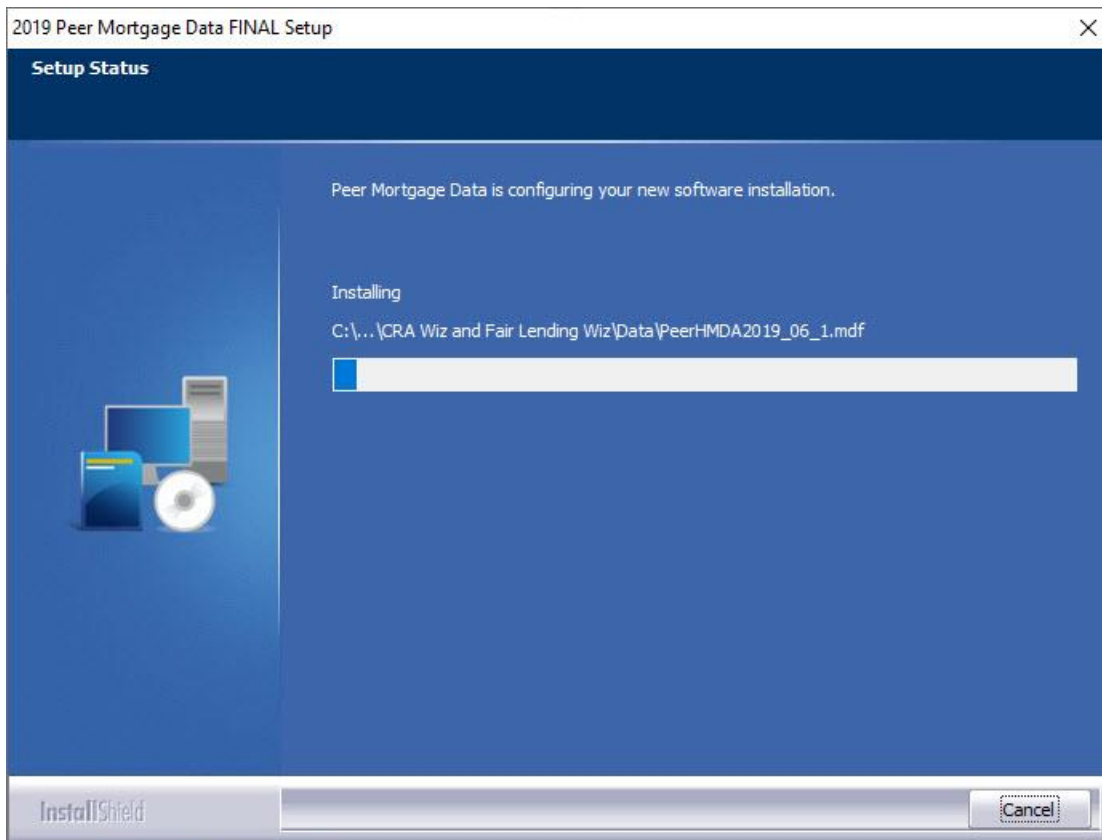
To begin installing the data sets, click the **Install** button:



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:

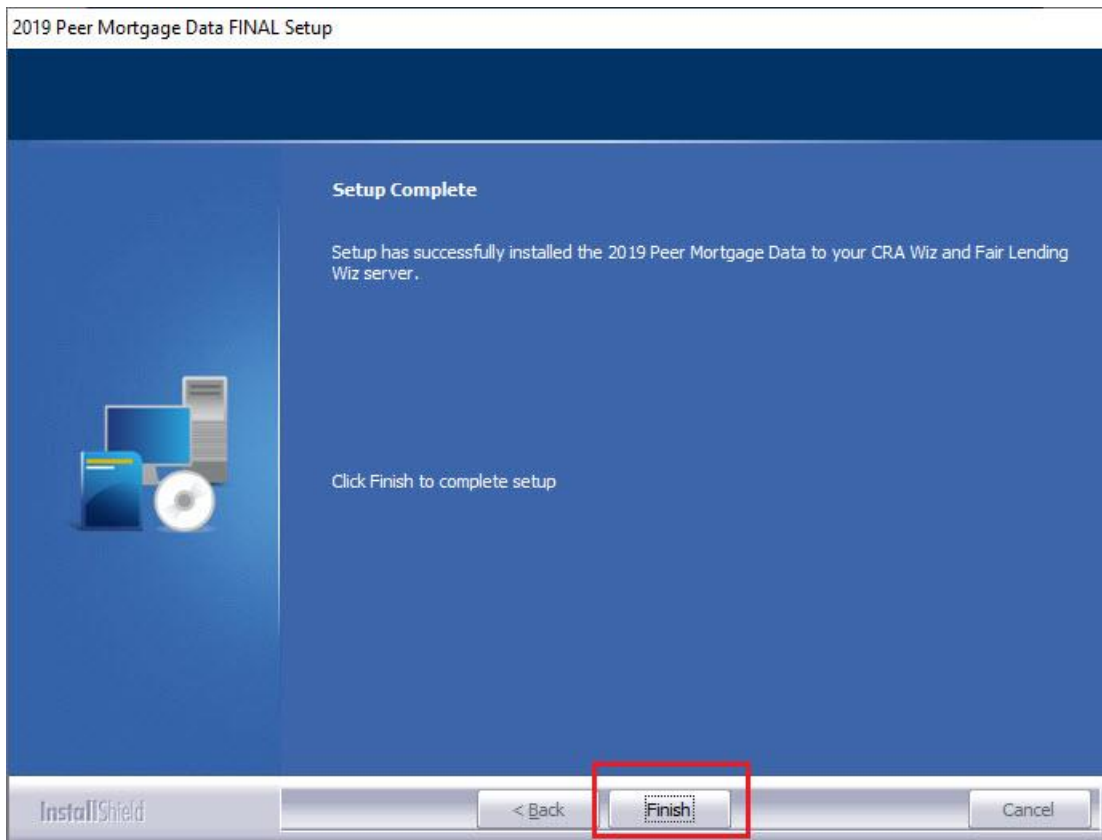


When installation is complete, the installer displays the **Setup Complete** screen.



## 2.5 Setup Complete Screen

Click the **Finish** button:



Installation is complete.

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