CRA *Wiz* and Fair Lending *Wiz* 7.0: 2014 Peer Lender Groups

Release Notes and Installation Instructions

Release Date: October 2015

Wolters Kluwer
Financial Services

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Overview

The **2014 Peer Lender Groups** update adds 2014 Peer Lender Groups to CRA *Wiz* & Fair Lending *Wiz* Peer reporting. With this update, you can analyze a group of lenders as a single institution, or filter for institutions submitted by that lender.

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**.

Where to install

This update should be applied to the SQL server where CRA *Wiz* databases are installed. No client or application-side installation is required.

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

A few megabytes (MB).

Approximate install time

Less than five (5) seconds, depending on system configuration.

Confirming installation

Once the installation is complete, you can verify the installation setting a Peer file as the active file. Then go to **Analysis** > **Reports**. Click **Tools** > **Manage Lender Groups**. You should see 40 groups, starting with 2014.

Installation Instructions

To install 2014 Peer Lender Groups, follow these steps:

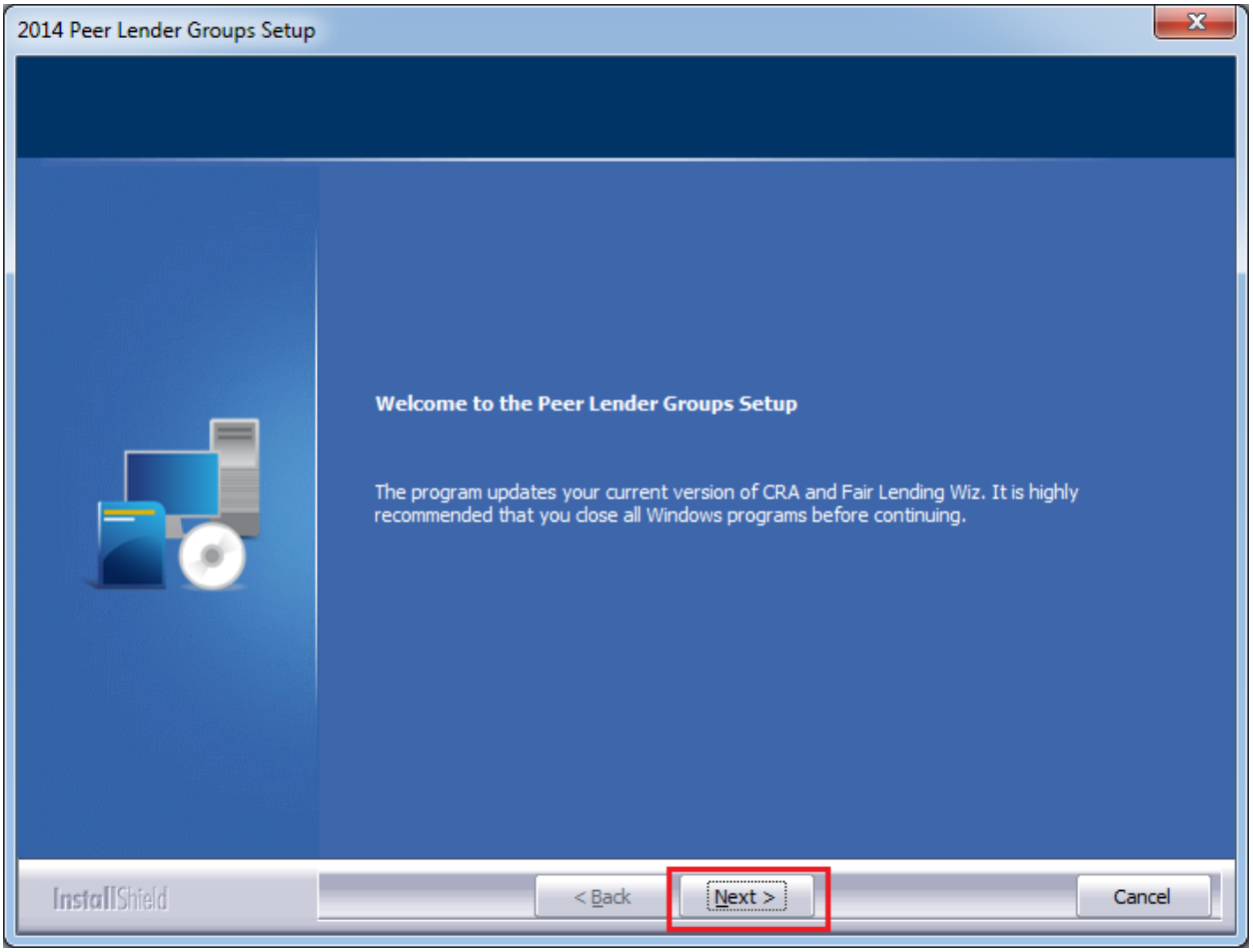
1. After downloading the update, locate and double-click the **2014PeerLenderGroups** installation file.

   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.

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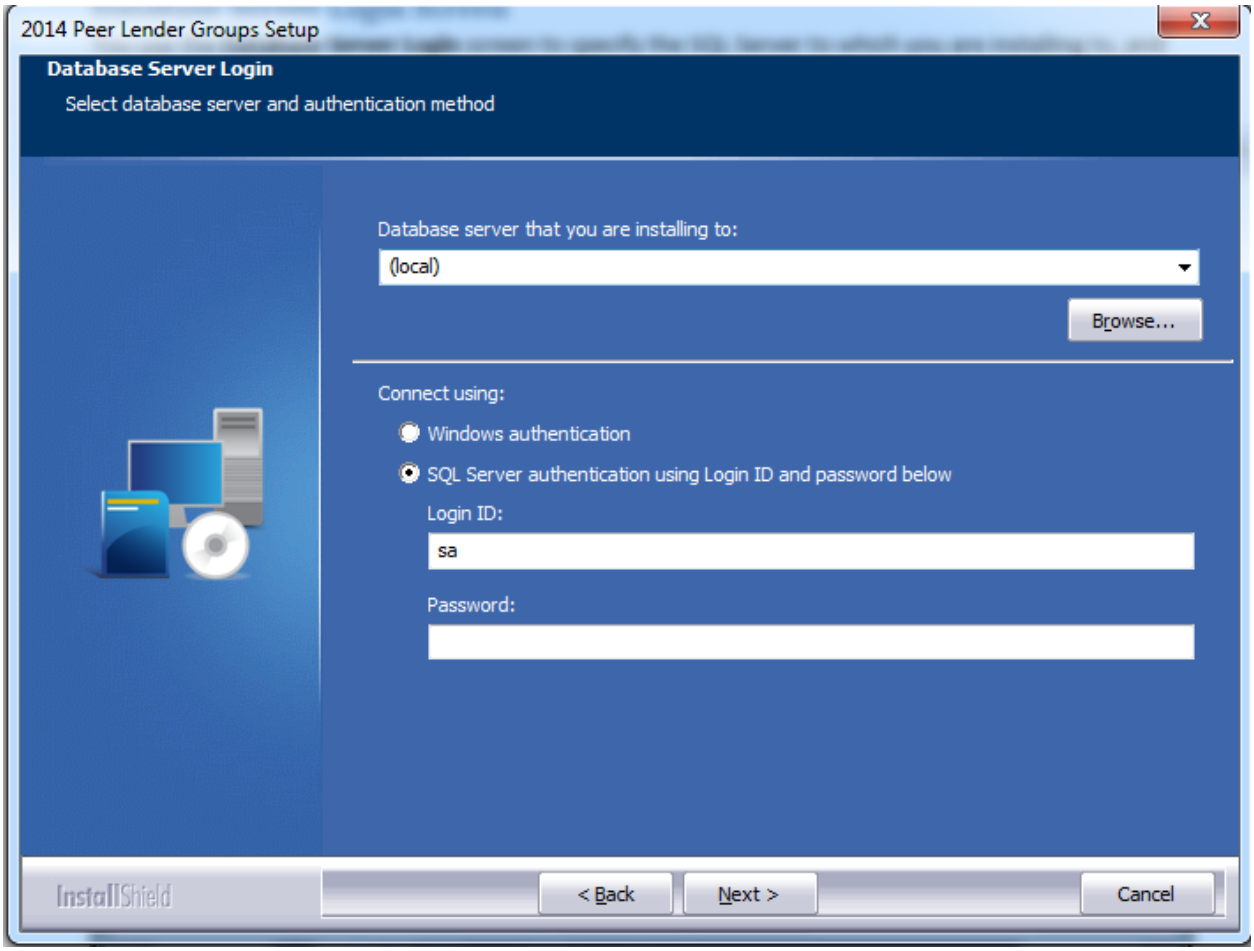
Database Server Login Screen

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.

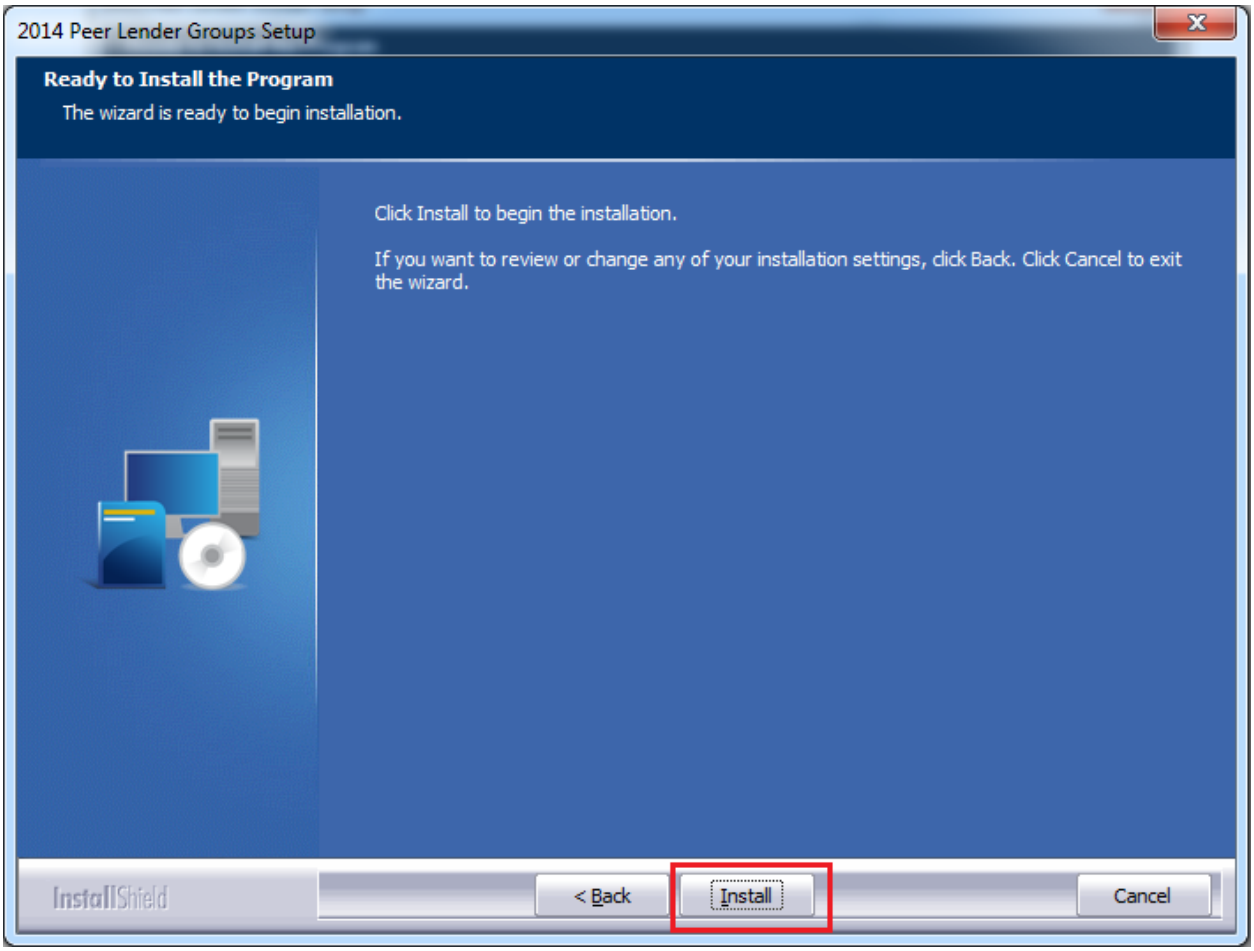
2. Choose one of the following authentication options:
   - Use Windows Authentication
   - Use SQL Server Authentication - If you select this option, you must also enter your SQL Server account **User Name** and **Password** in the **User Name** and **Password** fields.

3. Click the **Next** button.

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

Ready to Install Screen

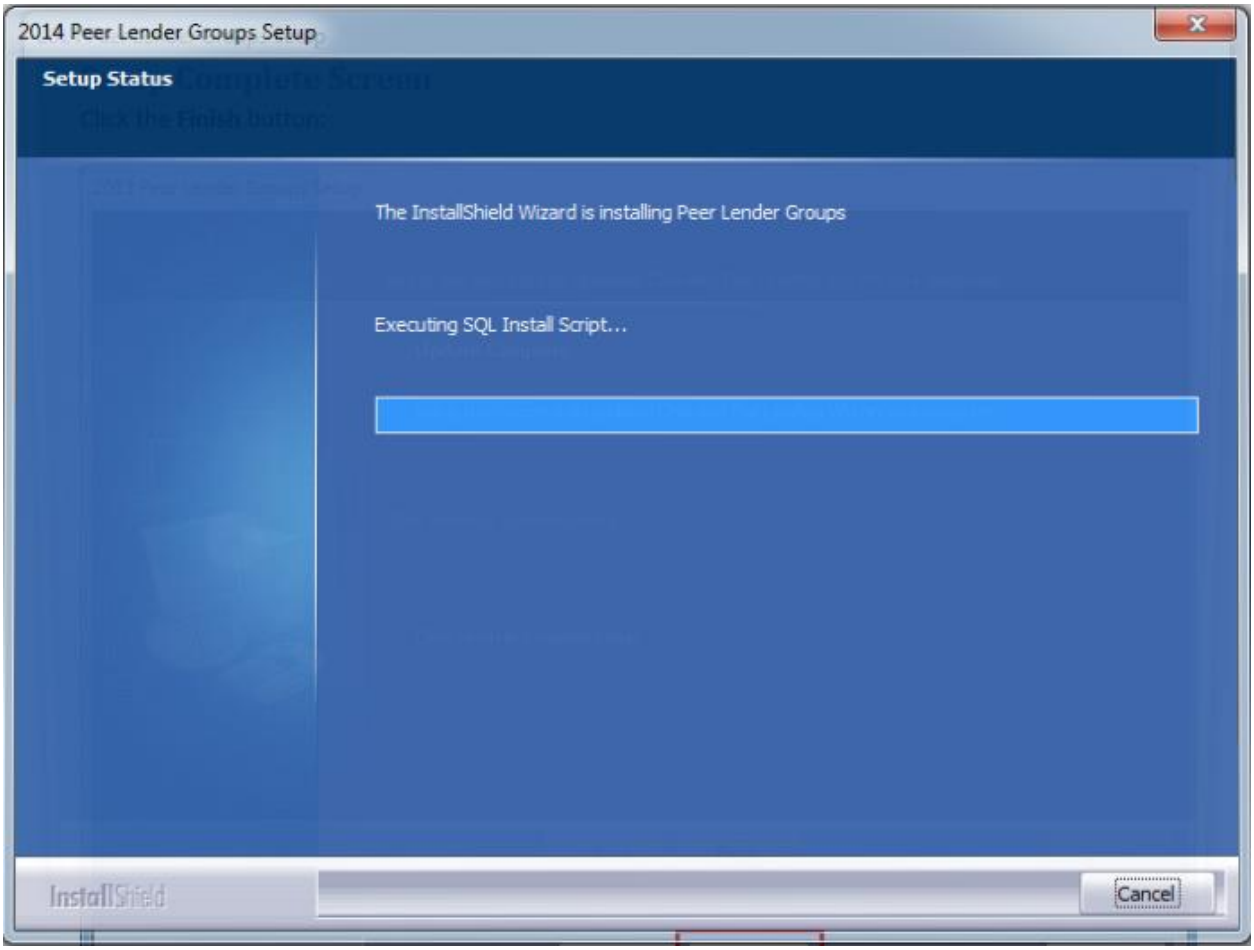
To begin installing the data, click the **Install** button:



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

Setup Status Screen

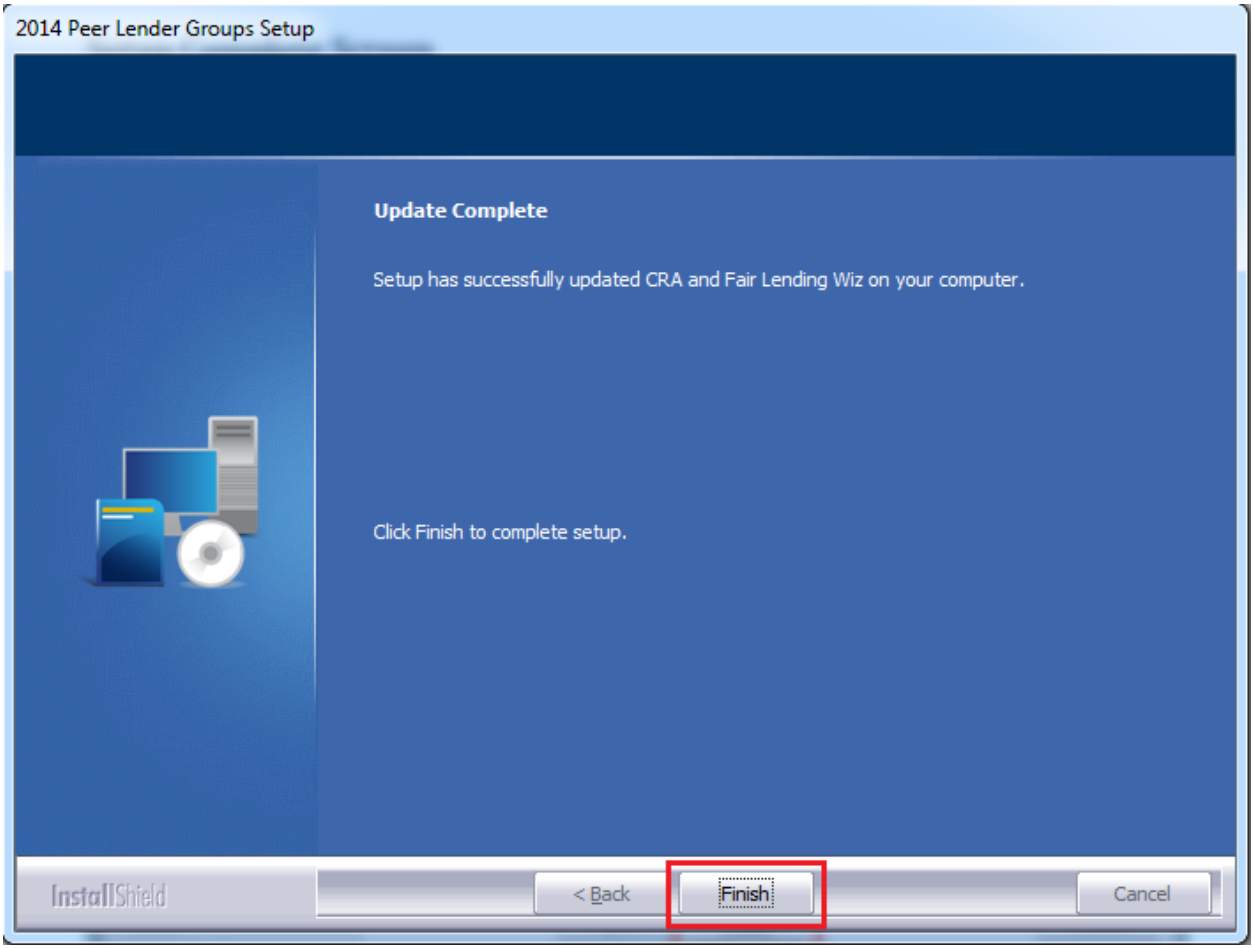
The **Setup Status** screen displays a progress bar that reports the progress of the installation:



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

Setup Complete Screen

Click the **Finish** button:



Installation is complete.

Appendix: 2014 Peer Groups List

2014 HMDA Lender Groups	2014 CRA Lender Groups
2014 PEER HMDA - BANK OF AMERICA NA	2014 PEER CRA - ALLY FINANCIAL
2014 PEER HMDA - BBT	2014 PEER CRA - AMERICAN EXPRESS
2014 PEER HMDA - BOKF NA	2014 PEER CRA - BANK OF AMERICA
2014 PEER HMDA - CHASE	2014 PEER CRA – BBT
2014 PEER HMDA - CITIGROUP	2014 PEER CRA - CAPITAL ONE FINANCIAL CORPORATION
2014 PEER HMDA - DISCOVER BANK	2014 PEER CRA – CHASE
2014 PEER HMDA - EVERBANK	2014 PEER CRA – CITIGROUP
2014 PEER HMDA - FIFTH THIRD BANK	2014 PEER CRA - COMPASS BANK
2014 PEER HMDA - FLAGSTAR BANK	2014 PEER CRA - DISCOVER BANK
2014 PEER HMDA - HUNTINGTON NATIONAL BANK	2014 PEER CRA - FIRST NATIONAL BANK OF OMAHA
2014 PEER HMDA - MT Bank	2014 PEER CRA - GE CAPITAL
2014 PEER HMDA - PLAINS CAPITAL BANK	2014 PEER CRA - JOHN DEERE FINANCIAL
2014 PEER HMDA - PNC BANK NA	2014 PEER CRA – KEYBANK
2014 PEER HMDA - RBS CITIZENS	2014 PEER CRA - PNC BANK
2014 PEER HMDA - REGIONS BANK	2014 PEER CRA - REGIONS BANK
2014 PEER HMDA - SUNTRUST	2014 PEER CRA – SUNTRUST
2014 PEER HMDA - TD BANK	2014 PEER CRA - TD BANK
2014 PEER HMDA - US BANK	2014 PEER CRA - TEXAS CAPITAL BANK
2014 PEER HMDA - USAA BANK	2014 PEER CRA - US BANK
2014 PEER HMDA - WELLS FARGO	2014 PEER CRA - WELLS FARGO

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