Consumer Compliance Solutions

CRA *Wiz* and Fair Lending *Wiz* 7.2: 2015 Peer Lender Groups

Release Notes and Installation Instructions

Release Date: November 2016

Wolters Kluwer

Financial Services

Table of Contents

Overview

The **2015 Peer Lender Groups** update adds 2015 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* 7.1 or 7.2 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 "71" or "72" 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 41 groups, starting with 2015.

The Peer Lender Groups install will not update the CRA *Wiz* build number.

Wolters Kluwer

Financial Services

Installation Instructions

To install 2015 Peer Lender Groups, follow these steps:
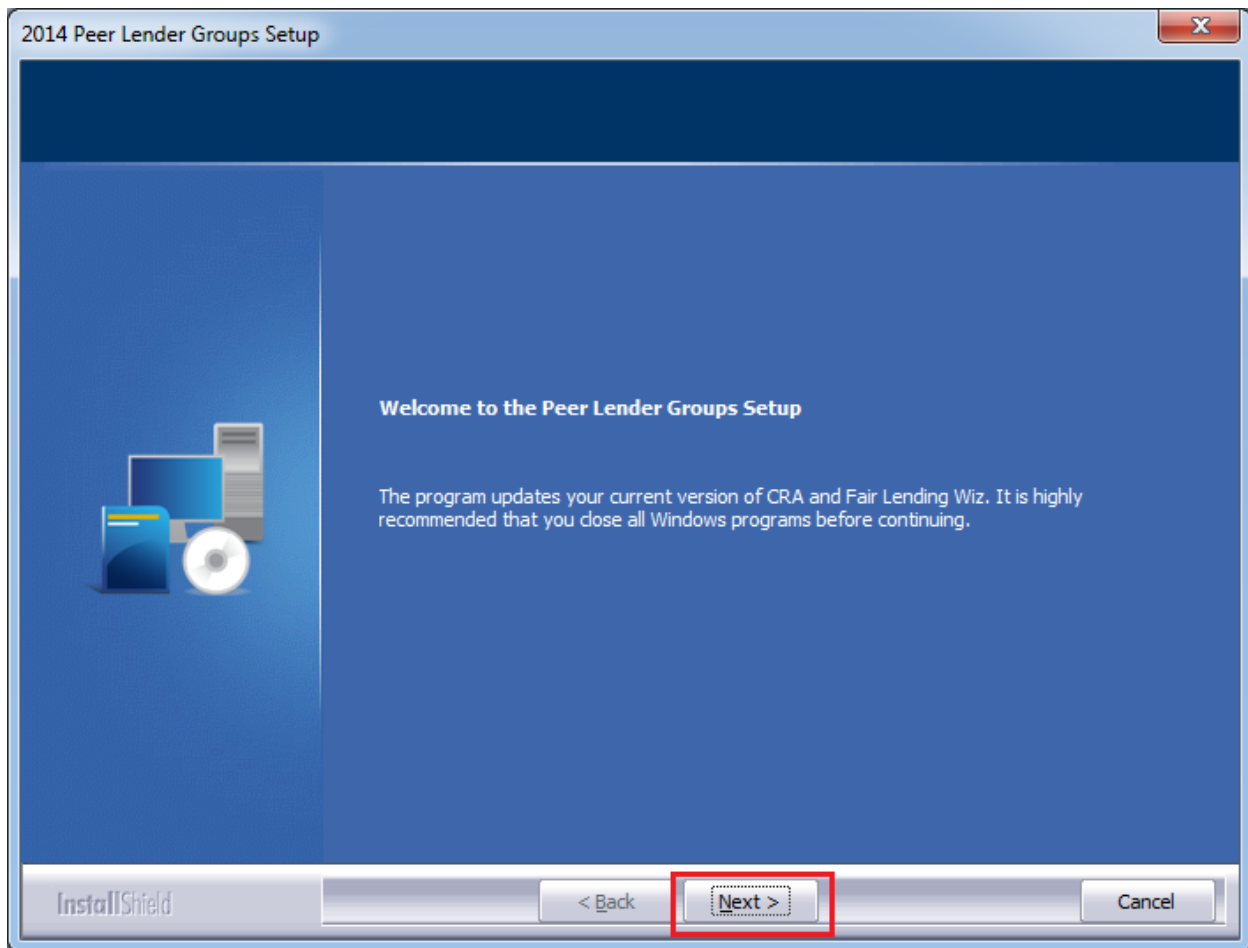
1. After downloading the update, locate and double-click the **2015PeerLenderGroups** installation file.

   The installer displays the **Welcome** screen.

2. Follow the directions for each of the following screens. Note that 2014 screenshots are used, but the steps have not changed.
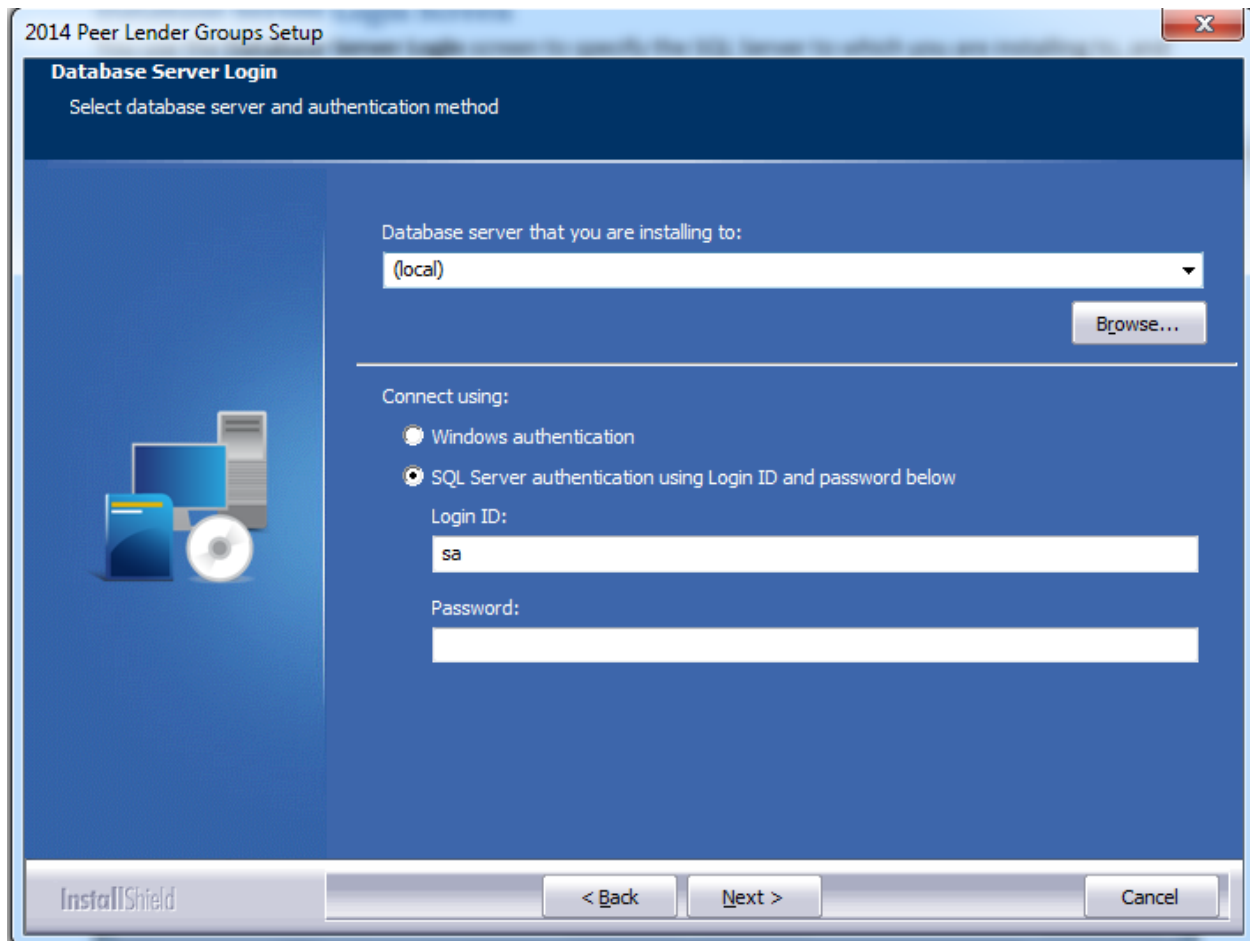
Welcome Screen

Click the **Next** button:

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

Wolters Kluwer
Financial Services

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.
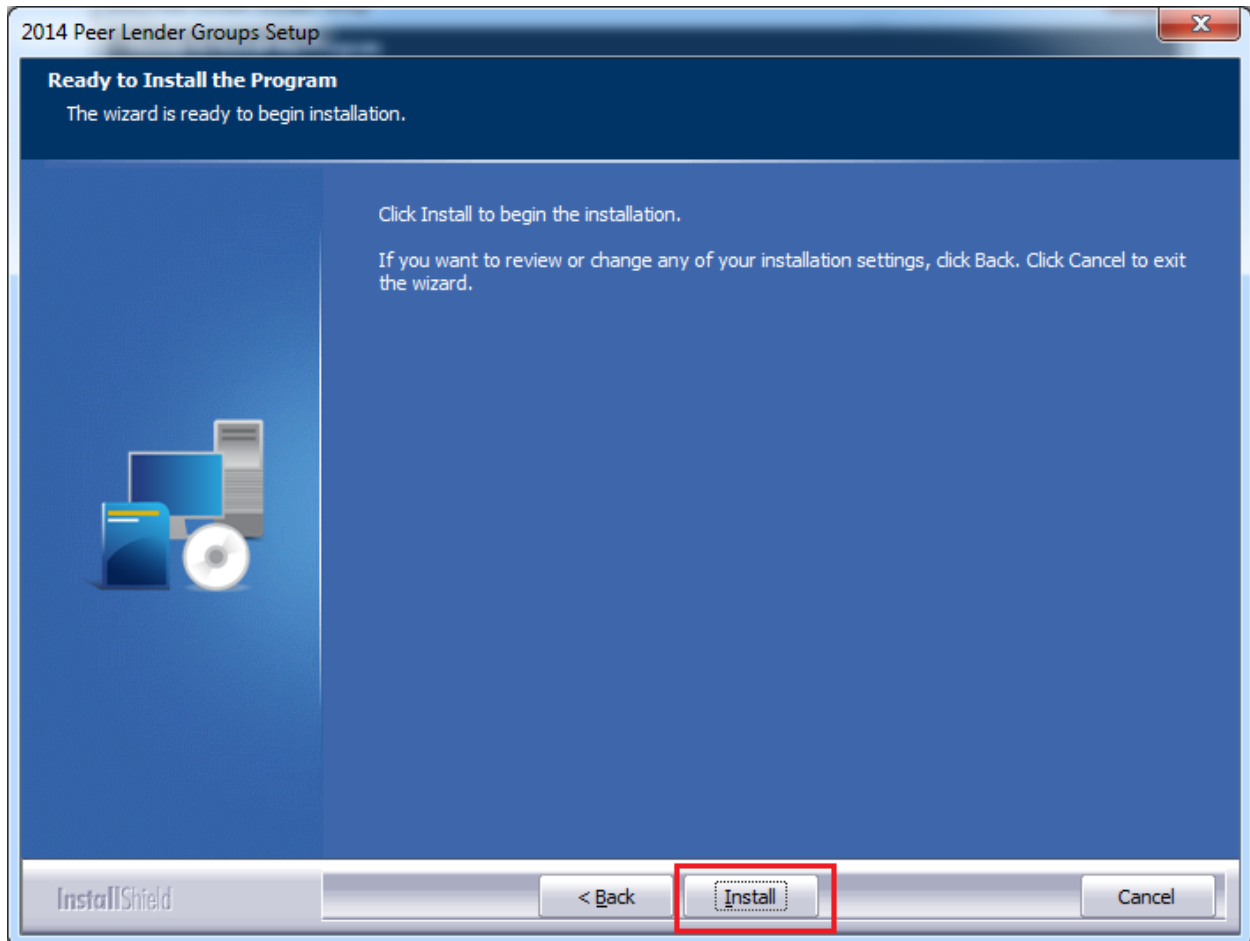
        Example: SVRBOS01\SQLEXPRESS

    *   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.

Wolters Kluwer
Financial Services

3. Click the **Next** button.

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

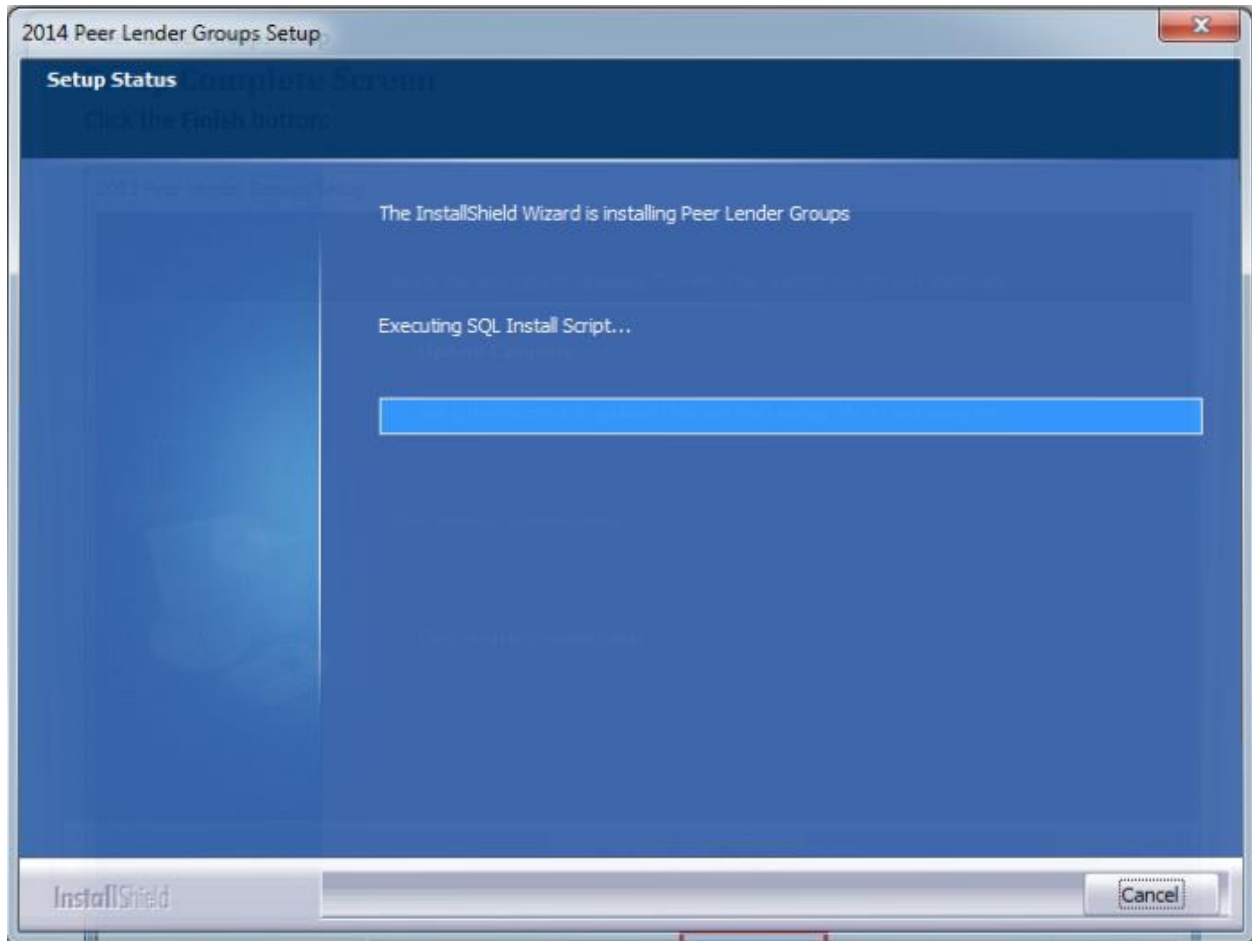## Ready to Install Screen

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

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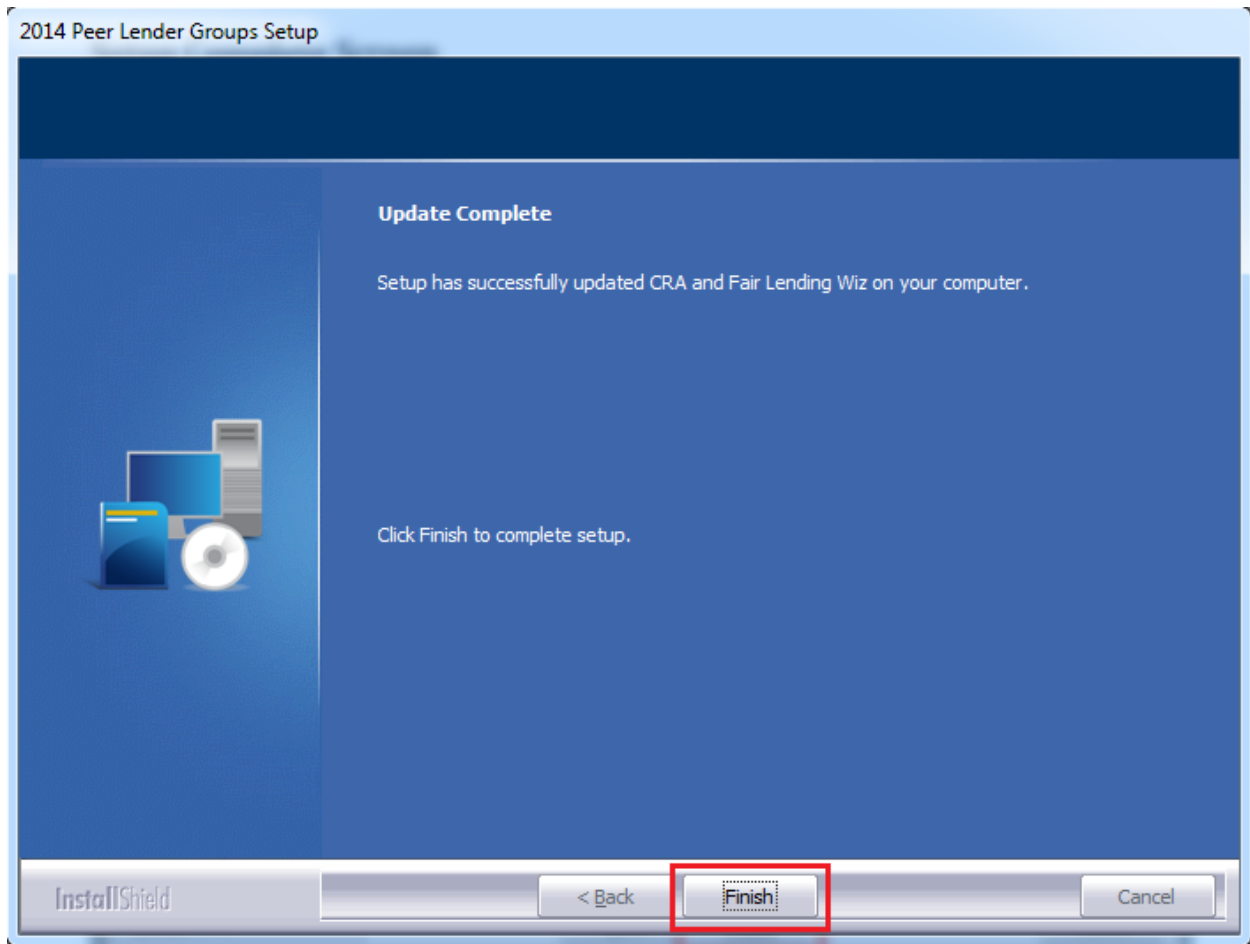
Setup Status Screen

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: 2015 Peer Groups List

2015 HMDA Lender Groups	2015 CRA Lender Groups
2015 PEER HMDA - BANK OF AMERICA, N.A.	2015 PEER CRA - ALLY FINANCIAL
2015 PEER HMDA - BBT	2015 PEER CRA - AMERICAN EXPRESS
2015 PEER HMDA - BOKF NA	2015 PEER CRA - BANK OF AMERICA
2015 PEER HMDA - CAPITAL ONE, NA	2015 PEER CRA - BANK OF THE WEST
2015 PEER HMDA - CITIGROUP	2015 PEER CRA - BBT
2015 PEER HMDA - CITIZENS BANK, NA	2015 PEER CRA - CAPITAL ONE FINANCIAL CORPORATION
2015 PEER HMDA - DISCOVER BANK	2015 PEER CRA - CHASE
2015 PEER HMDA - EVERBANK	2015 PEER CRA - CITIGROUP
2015 PEER HMDA - FIFTH THIRD BANK	2015 PEER CRA - COMPASS BANK
2015 PEER HMDA - JPMORGAN CHASE BANK, NA	2015 PEER CRA - FIRST CITIZENS BANK & TRUST CO
2015 PEER HMDA - KEYBANK	2015 PEER CRA - FIRST NATIONAL BANK OF OMAHA
2015 PEER HMDA - M&T BANK	2015 PEER CRA - GE CAPITAL
2015 PEER HMDA - PNC BANK N.A.	2015 PEER CRA - PNC BANK
2015 PEER HMDA - REGIONS BANK	2015 PEER CRA - REGIONS BANK
2015 PEER HMDA - SUNTRUST BANK, INC	2015 PEER CRA - SUNTRUST
2015 PEER HMDA - TD BANK N.A.	2015 PEER CRA - SYNCHRONY
2015 PEER HMDA - THE HUNTINGTON NATIONAL BANK	2015 PEER CRA - TD BANK
2015 PEER HMDA - US BANK, N.A.	2015 PEER CRA - TEXAS CAPITAL BANK
2015 PEER HMDA - USAA FEDERAL SAVINGS BANK	2015 PEER CRA - US BANK
2015 PEER HMDA - WELLS FARGO	2015 PEER CRA - WELLS FARGO
	2015 PEER CRA - ZIONS FIRST NATIONAL BANK

Wolters Kluwer
Financial Services

Wolters Kluwer Financial Services
130 Turner Street
Building 3, 4th Floor
Waltham, MA 02453

800.261.3111