



Consumer Compliance Solutions

CRA *Wiz* and Fair Lending *Wiz*: 2016 Peer Lender Groups

Release Notes and Installation Instructions

Release Date: February 2018

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Overview

The **2016 Peer Lender Groups** update adds 2016 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 and/or Peer Small Business 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 7.2 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 "72" are acceptable.

Required permissions

This install inserts new data into the **General** 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 **23 groups**, starting with **2016**.

Note: The Peer Lender Groups install will not update the *CRA Wiz* and *Fair Lending Wiz* build number.

Installation Instructions

To install 2016 Peer Lender Groups, follow these steps:

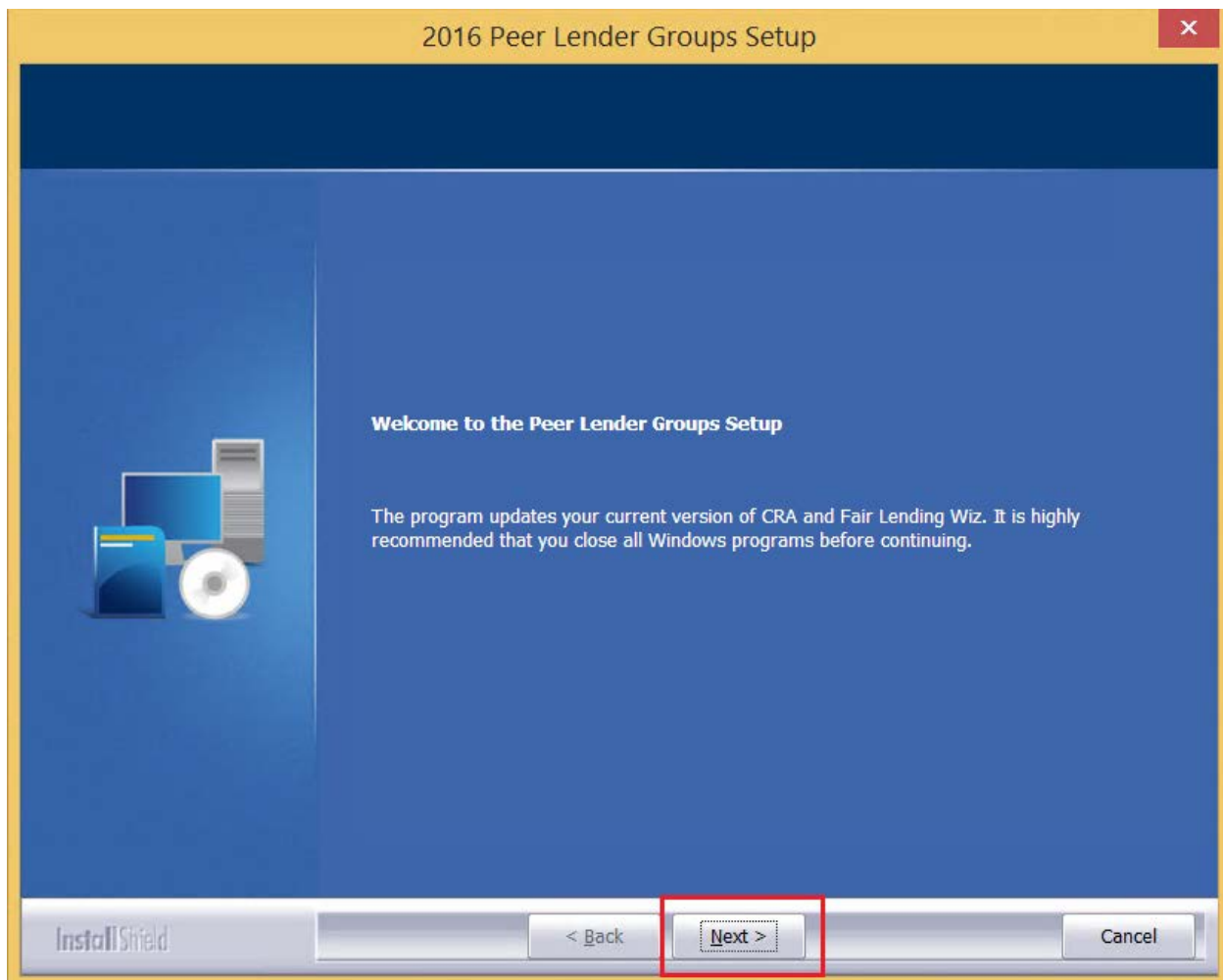
1. After downloading the update locally on the SQL Server, locate and double-click the **2016PeerLenderGroups** installation file.

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.

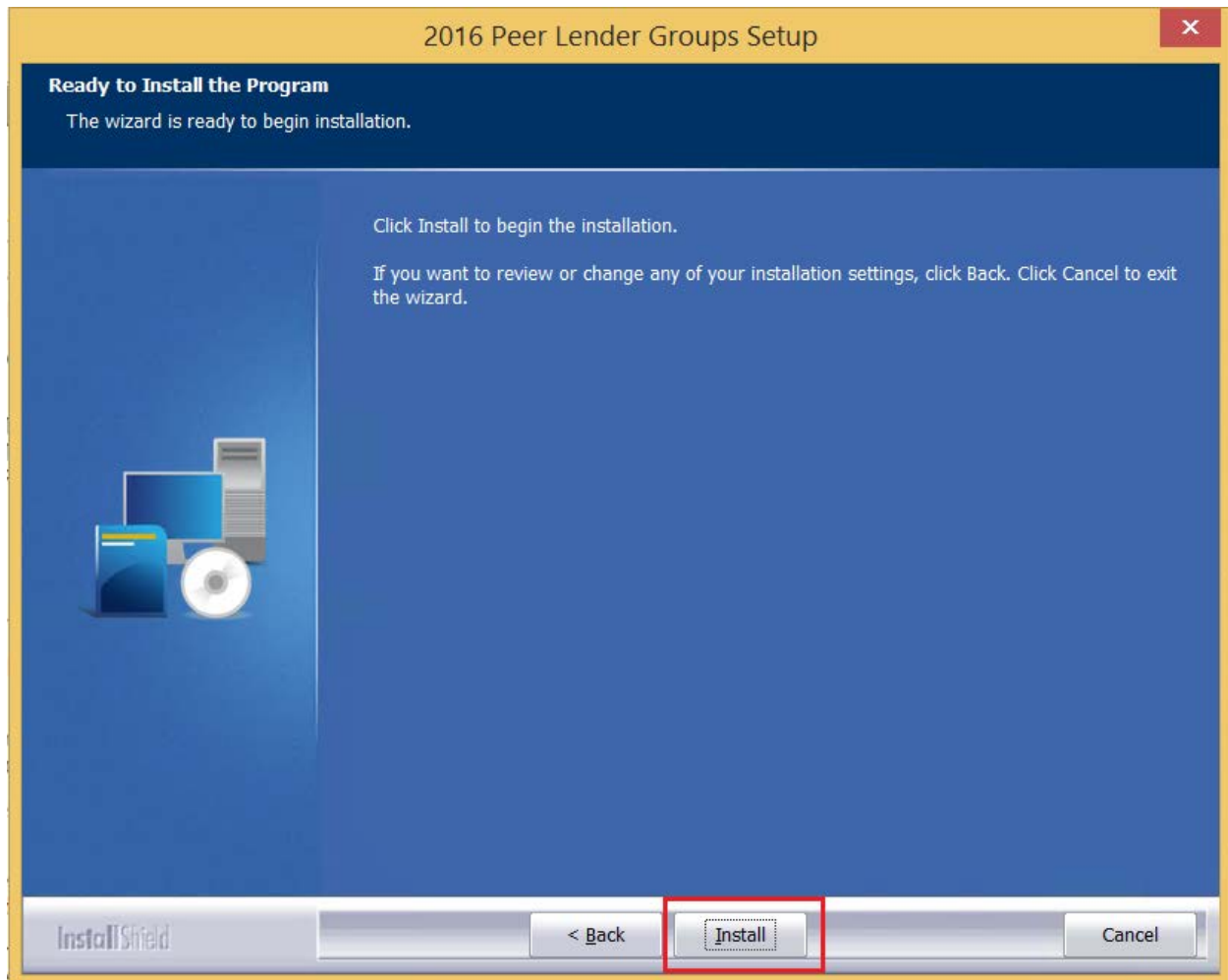
Example: SVRBOS01\SQLEXPRESS
 - Click the **Browse** button and in the resultant dialog box, select the SQL Server.
2. Choose one of the following authentication options:
 - Use Windows Authentication
 - Use SQL Server Authentication - If you select this option, you must also enter your SQL Server account **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

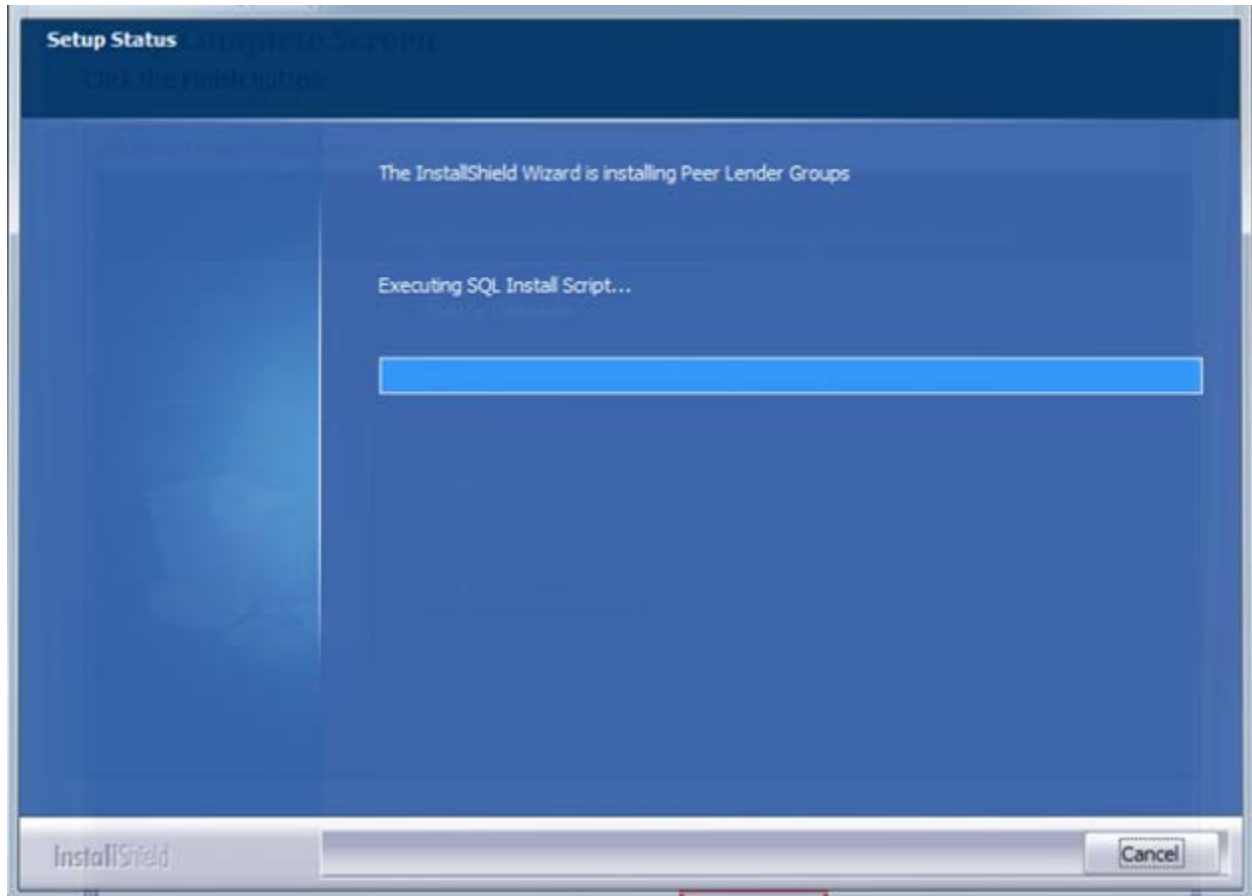
To begin installing the data, click the **Install** button:



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

Setup Status Screen

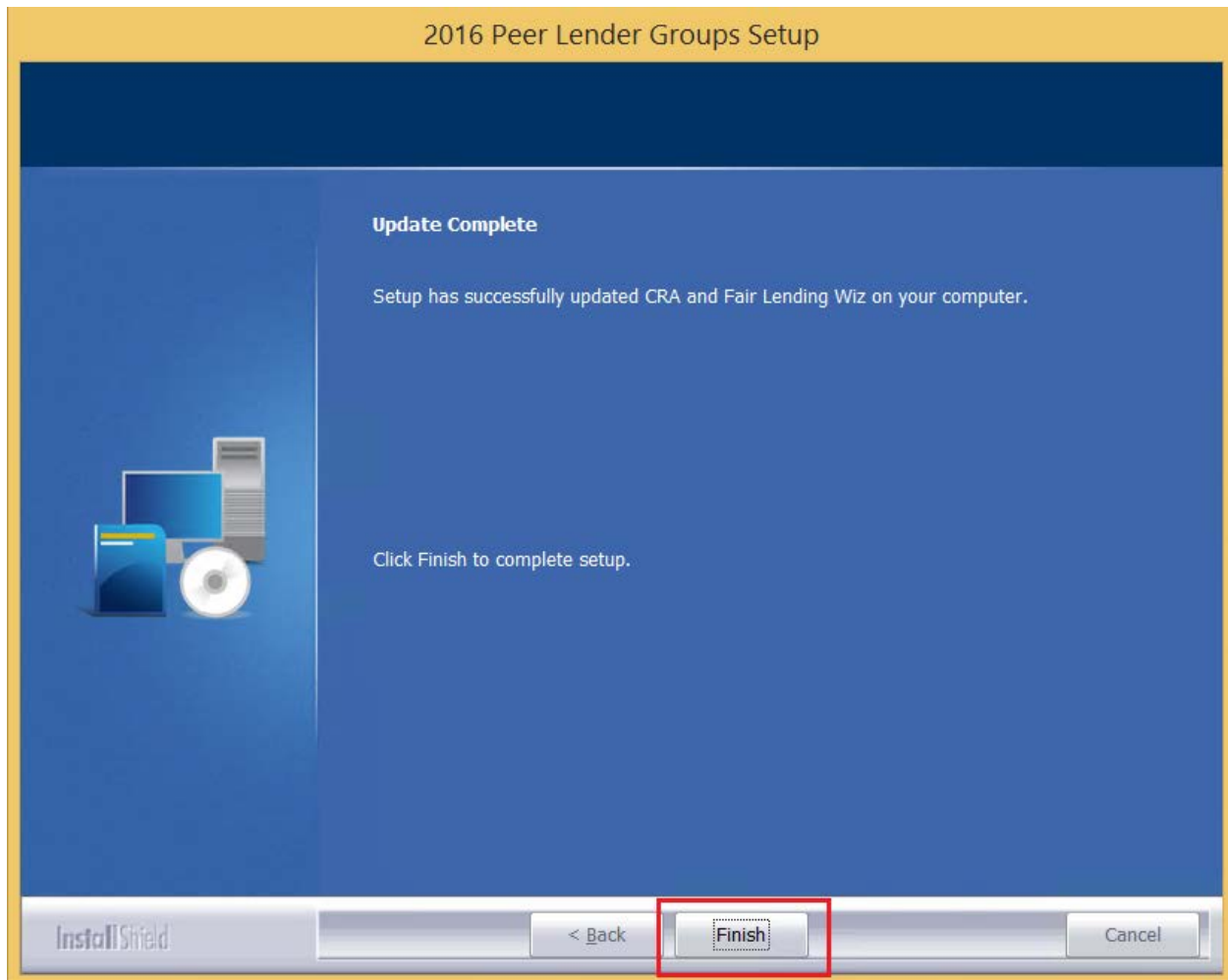
The **Setup Status** screen displays a progress bar that reports the progress of the installation:



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

Setup Complete Screen

Click the **Finish** button:



Installation is complete.

Appendix: 2016 Peer Groups List

2016 HMDA Lender Groups	2016 CRA Lender Groups
2016 PEER HMDA - BANK OF AMERICA, N.A.	2016 PEER CRA - BANK OF AMERICA, N.A.
2016 PEER HMDA - BBT	2016 PEER CRA - BBT
2016 PEER HMDA - BOKF NA	2016 PEER CRA - CAPITAL ONE FINANCIAL CORPORATION
2016 PEER HMDA - CAPITAL ONE, NA	2016 PEER CRA - CITIGROUP
2016 PEER HMDA - CITIGROUP	2016 PEER CRA - FIFTH THIRD BANK
2016 PEER HMDA - FIFTH THIRD BANK	2016 PEER CRA - PNC BANK
2016 PEER HMDA - M&T BANK	2016 PEER CRA - REGIONS BANK
2016 PEER HMDA - PNC BANK N.A.	2016 PEER CRA - SUNTRUST
2016 PEER HMDA - REGIONS BANK	2016 PEER CRA - US BANK
2016 PEER HMDA - SUNTRUST BANK, INC	2016 PEER CRA - WELLS FARGO
2016 PEER HMDA - US BANK, N.A.	
2016 PEER HMDA - USAA FEDERAL SAVINGS BANK	
2016 PEER HMDA - WELLS FARGO	

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