



Consumer Compliance Solutions

CRA *Wiz* and Fair Lending *Wiz* 7.0: 2014 Peer Mortgage Data

Release Notes and Installation Instructions

Release Date: October 2015



Wolters Kluwer
Financial Services

Table of Contents

Overview	3
Data source	3
Who should install	3
Prerequisites	3
Required permissions.....	3
Required free space	3
Approximate install time.....	3
Confirming installation.....	3
Installation Instructions	4
Welcome Screen	4
Database Server Login Screen.....	5
Ready to Install Screen.....	6
Setup Status Screen	7
Setup Complete Screen.....	8

Overview

On September 22nd, the FFIEC [announced the release](#) of the complete set of 2014 HMDA submission data. This update allows users to incorporate this data into their CRA *Wiz* reporting and analysis.

Note: The issues related to free space and install times of last year's dataset have been resolved.

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* 7.0 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 "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

Data folder: 3 GB

Log folder: < 0.5 GB

Temp folder: 2 GB

The Data and Log file locations can be found in System Maintenance. Temp is generally on the C: drive.

Approximate install time

10 – 30 minutes, depending on hardware configuration and specifications.

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 **2014 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 2014 Peer Mortgage Data installer.

Installation Instructions

To install 2014 Peer Mortgage Data, follow these steps:

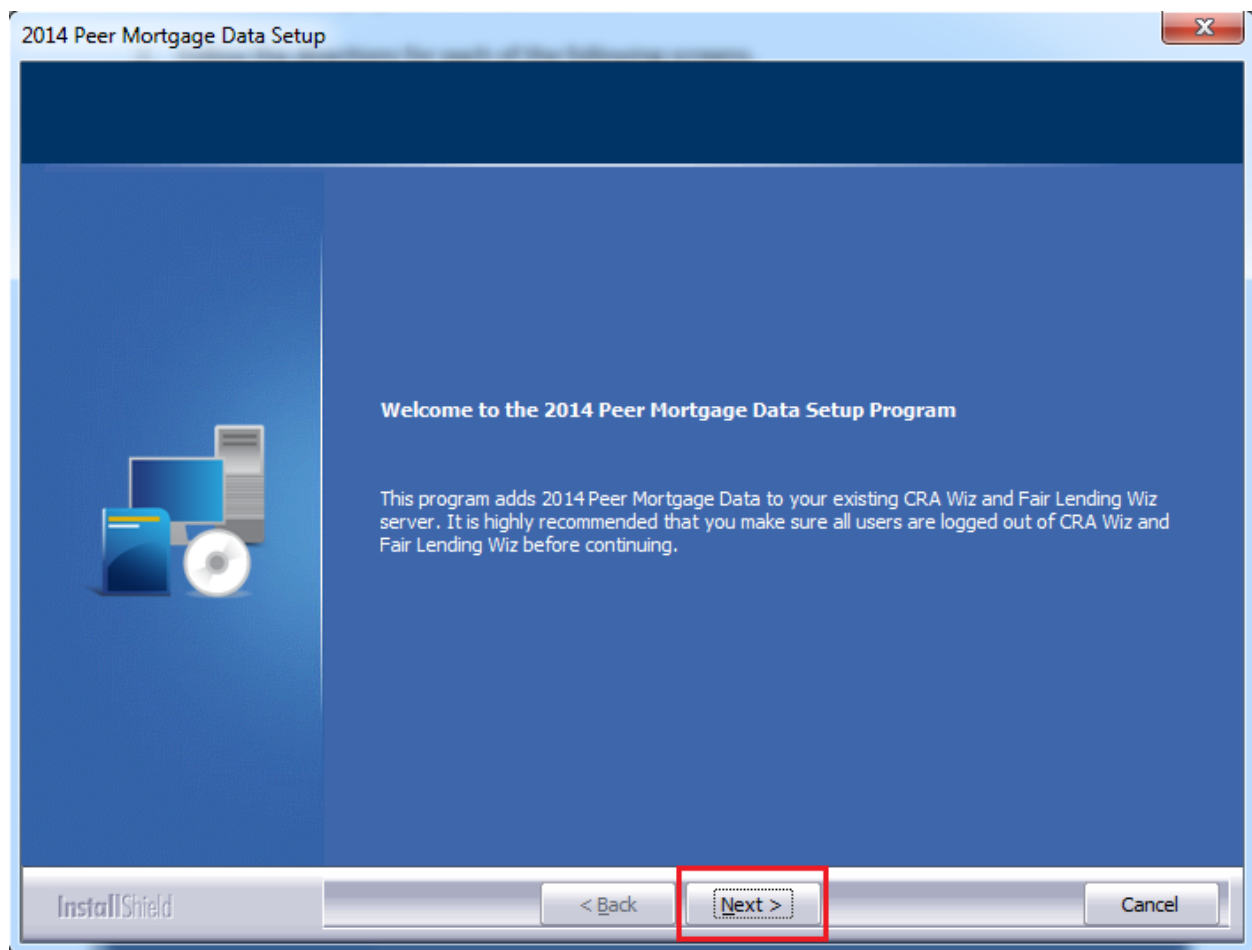
1. After downloading the update, locate and double-click the **2014PeerMortgageData** installation file.

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:

2014 Peer Mortgage Data Setup

Database Server Login
Select database server and authentication method

Database server that you are installing to:

Browse...

Connect using:

Windows authentication

SQL Server authentication using Login ID and password below

Login ID:

Password:

InstallShield < Back Next > Cancel

To configure SQL Server options, follow these steps:

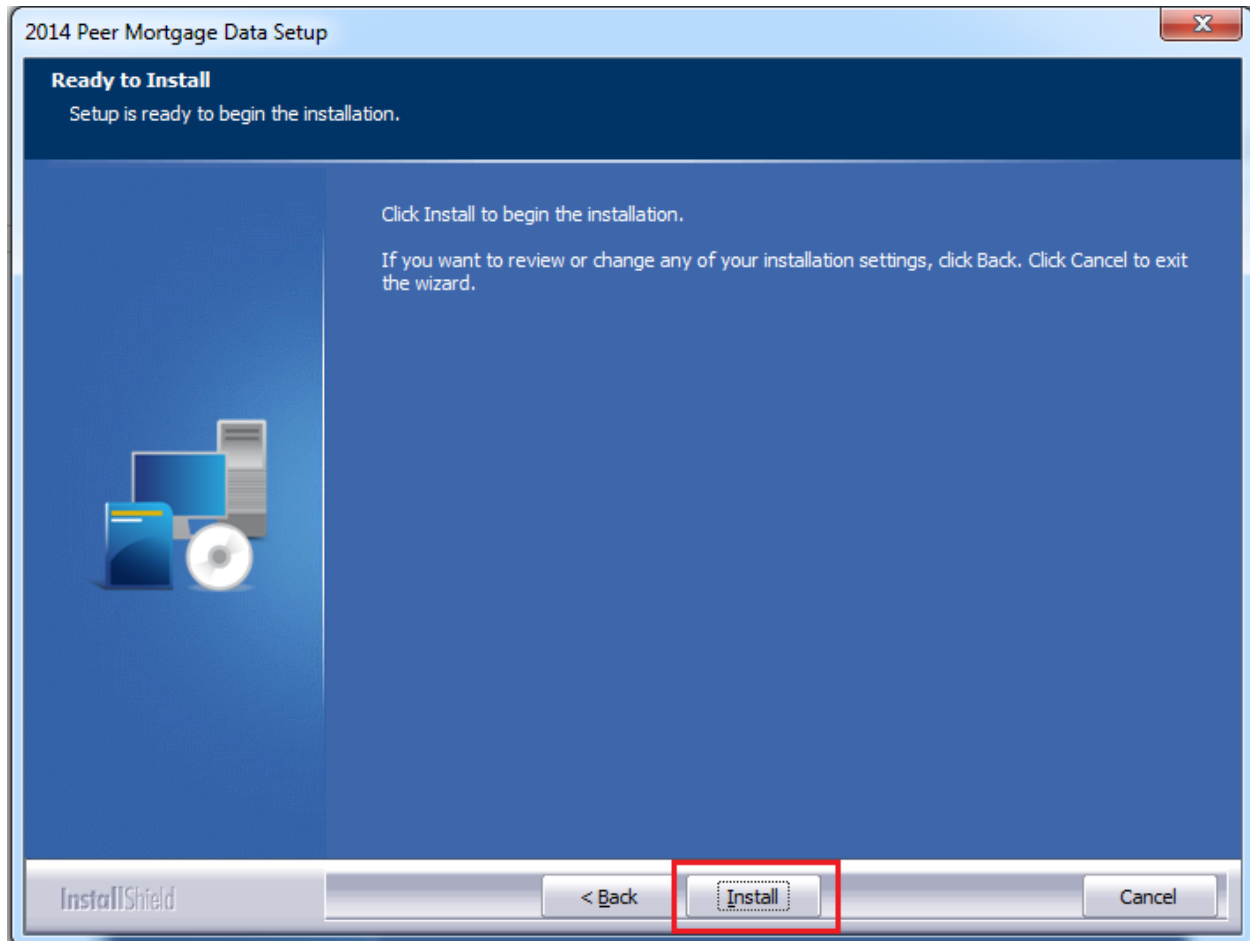
1. Do one of the following:
 - In the **Database server that you are installing to** field, enter the **SQL Server name and instance** to which you are installing the data.
Example: SVRBOS01\SQLEXPRESS
 - Click the **Browse** button and in the resultant dialog box, select the SQL Server.
2. Choose one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

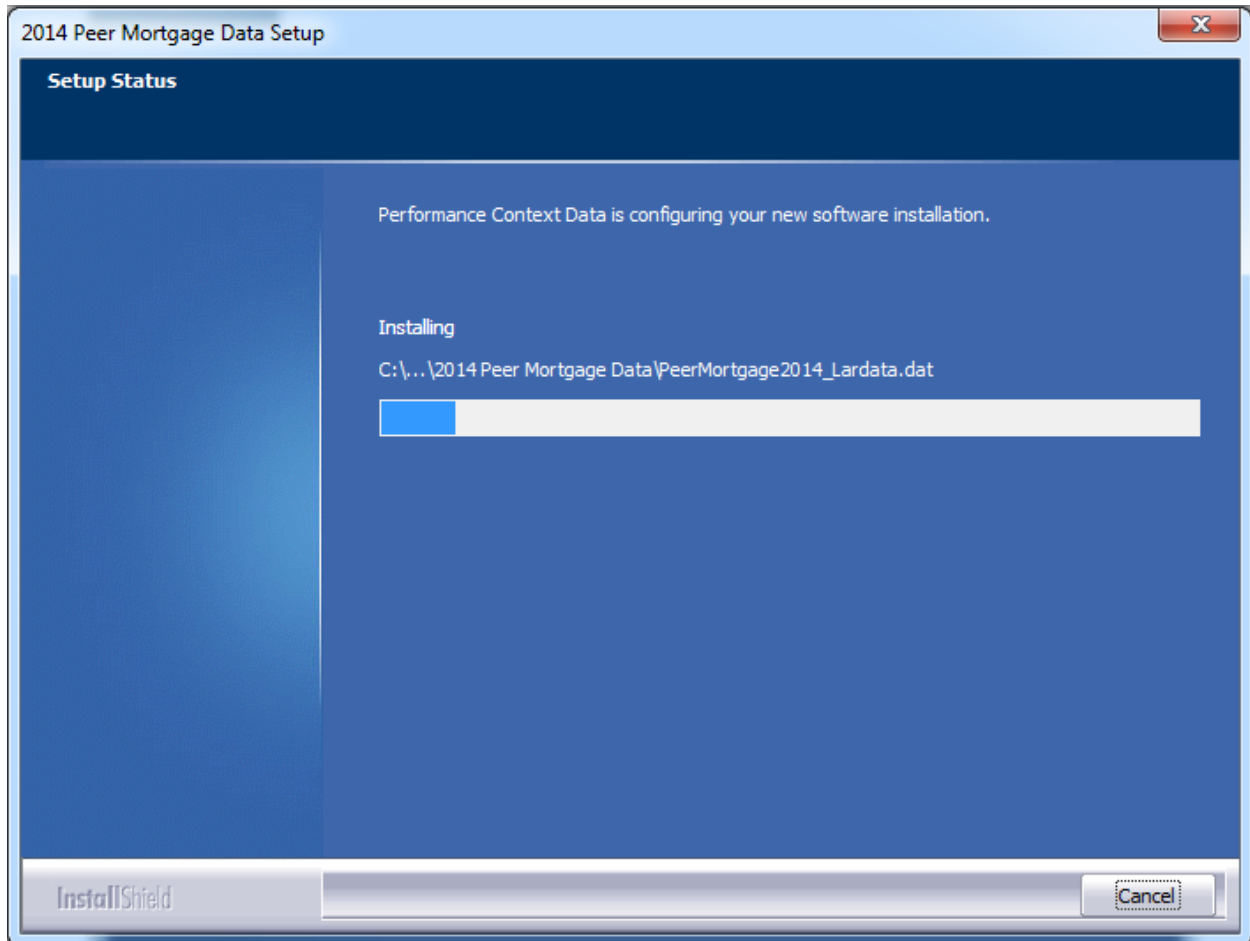
To begin installing the data sets, click the **Install** button:



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

Setup Status Screen

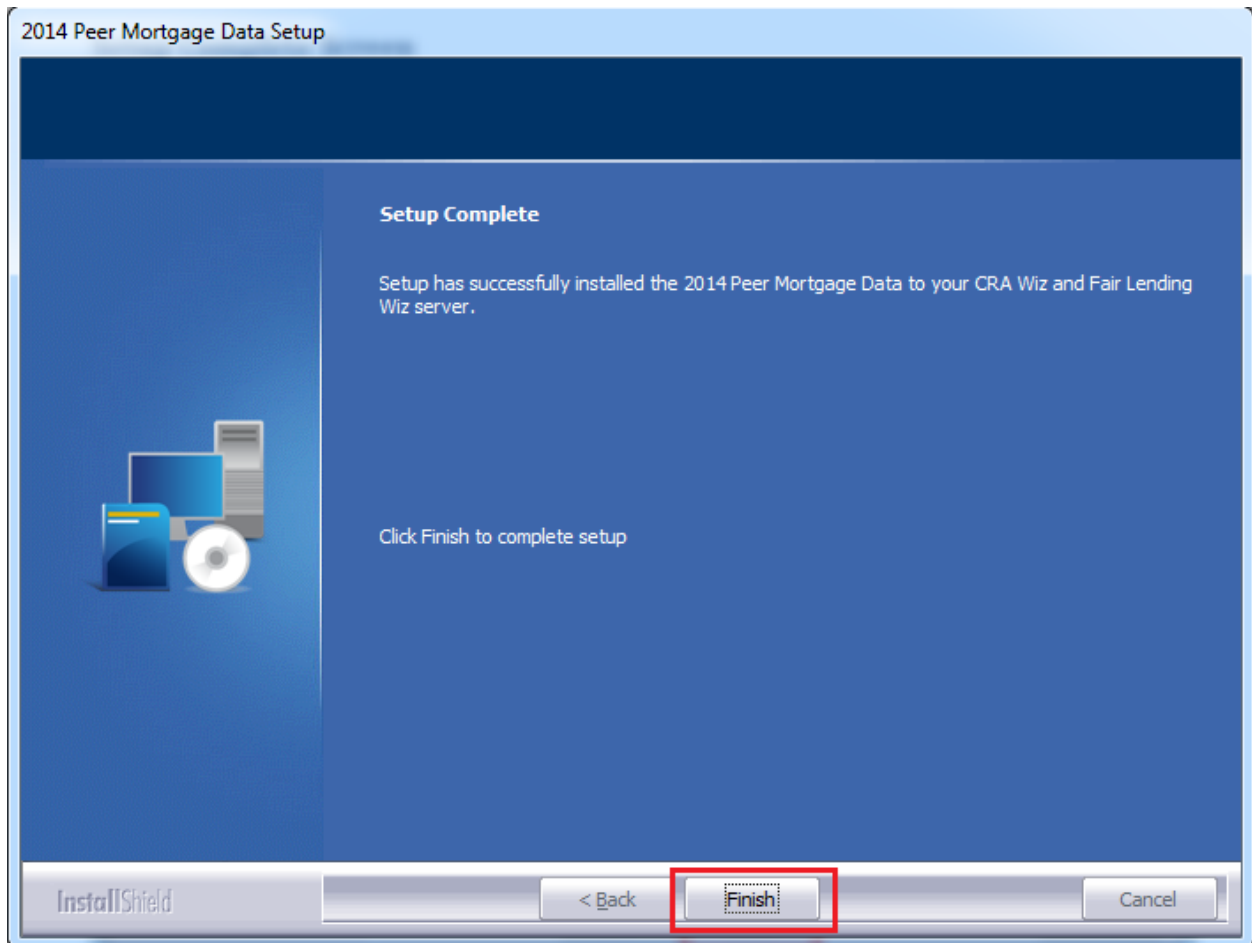
The **Setup Status** screen displays a progress bar that reports the progress of the installation:



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

Setup Complete Screen

Click the **Finish** button:



Installation is complete.

About Wolters Kluwer Financial Services - Wolters Kluwer Financial Services provides audit, risk and compliance solutions that help financial organizations improve efficiency and effectiveness across their enterprise. Whether complying with regulatory requirements, addressing a single key risk, or working toward a holistic risk management strategy, more than 15,000 customers worldwide count on Wolters Kluwer Financial Services for a comprehensive and dynamic view of risk management and compliance. With more than 30 offices in over 20 countries, the company's prominent brands include: FRSGlobal, ARC Logics for Financial Services, PCi, Bankers Systems, VMP® Mortgage Solutions, AppOne®, GainsKeeper®, Capital Changes, NILS, AuthenticWeb™ and Uniform Forms™. Wolters Kluwer Financial Services is part of Wolters Kluwer, a leading global information services and publishing company with annual revenues of (2011) €3.4 billion (\$4.7 billion) and approximately 19,000 employees worldwide. Please visit our website for more information.

Wolters Kluwer Financial Services
130 Turner Street
Building 3, 4th Floor
Waltham, MA 02453
800.261.3111

© 2015 Wolters Kluwer Financial Services