CRA *Wiz* and Fair Lending *Wiz*: 2017 Peer Mortgage Data

Release Notes and Installation Instructions

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Wolters Kluwer

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Overview

On May 7th, 2018, the FFIEC posted the release of the 2017 Aggregate Data on Mortgage Lending. This update allows users to incorporate this data into their CRA *Wiz* and Fair Lending *Wiz* reporting and analysis.

Data source

CFPB HMDA LAR

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* 7.3 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 "73" are acceptable.

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

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: 4 GB **Log folder**: 20 MB **Temp folder**: 2MB

The **Data** and **Log file** locations can be found in **System Maintenance** or by running the below query in **SQL Server Management Studio** if you do not have access to the application:

Note: The **Temp** folder is generally located on the **C:** drive.

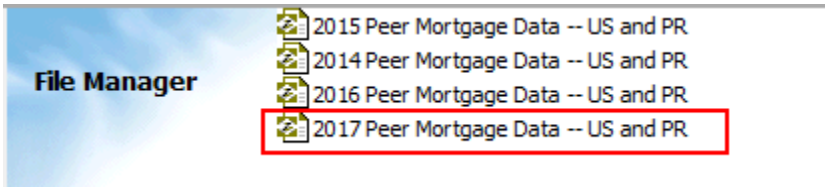
```
use objectstore
select location from dbo.elementlocations
where elementname='Database File Location on Server'
or elementname='Log File Location on Server'
```

Approximate install time

5 – 10 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 **2017 Peer Mortgage Data – US & 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 2017 Peer Mortgage Data installer.

Installation Instructions

To install 2017 Peer Mortgage Data, follow these steps:

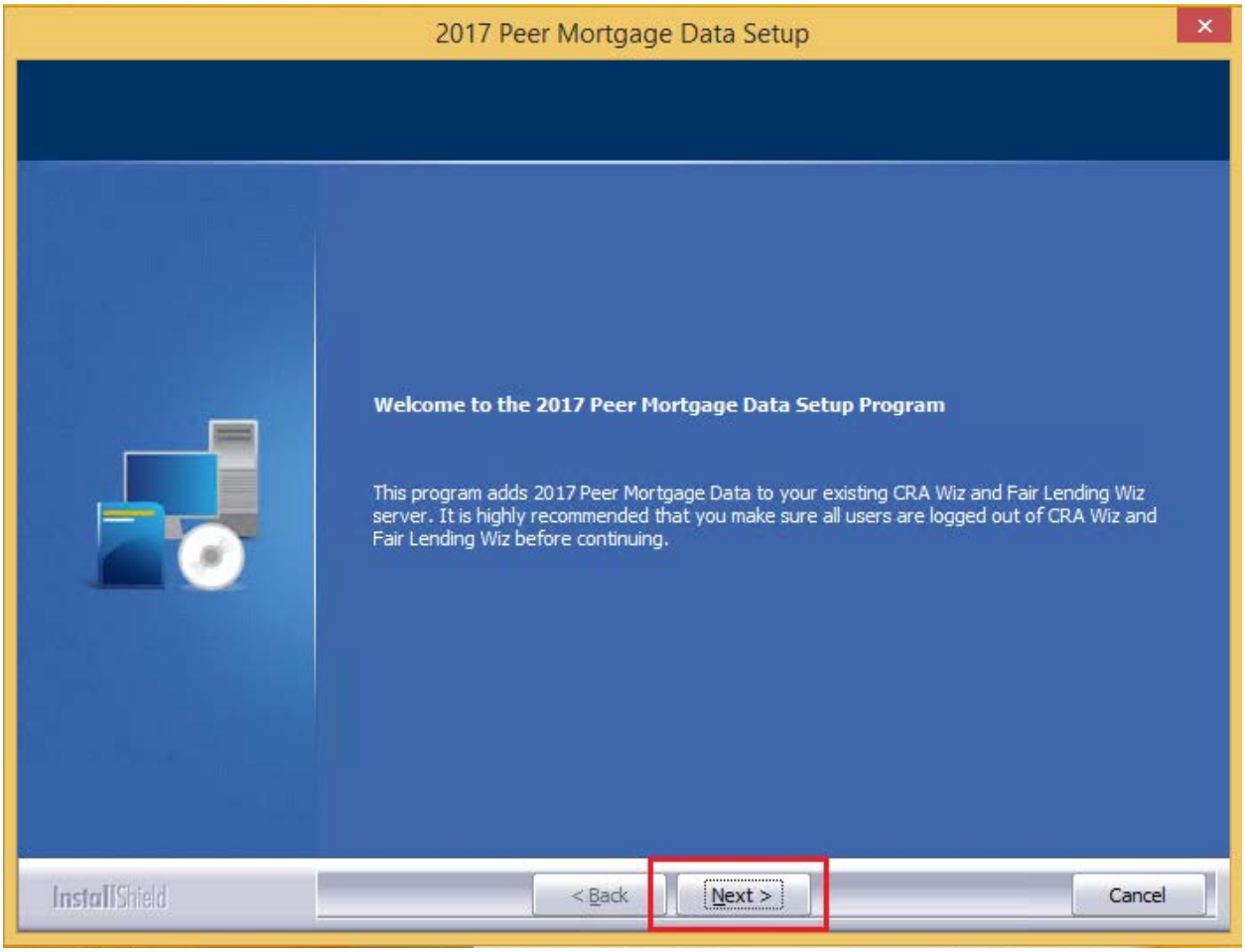
1. After downloading the update locally onto the SQL Server where CRA *Wiz* and Fair Lending *Wiz* is installed, locate and double-click the **2017PeerMortgageData** installation file.

   The installer displays the **Welcome** screen.

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

Welcome Screen

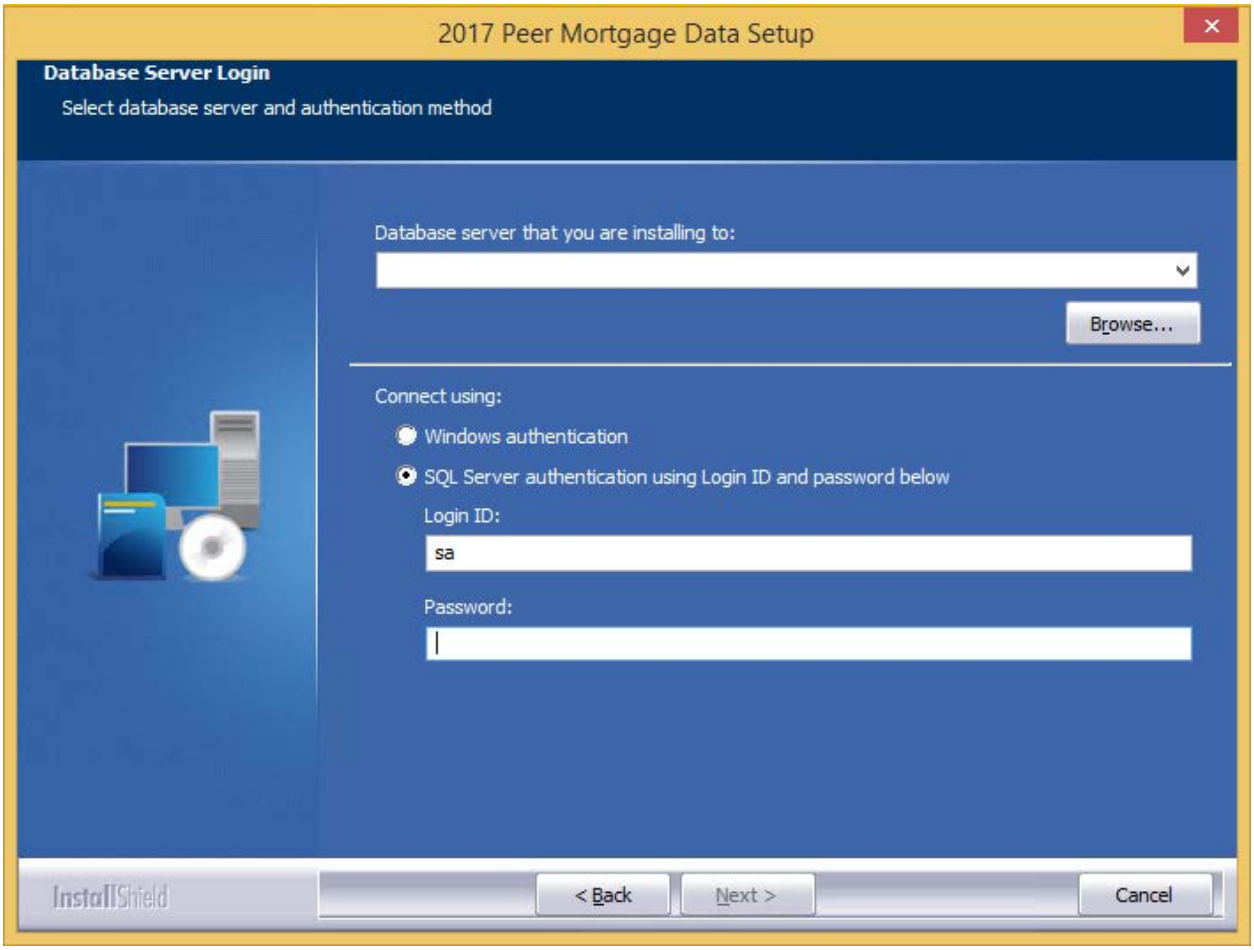
Click the **Next** button:



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.

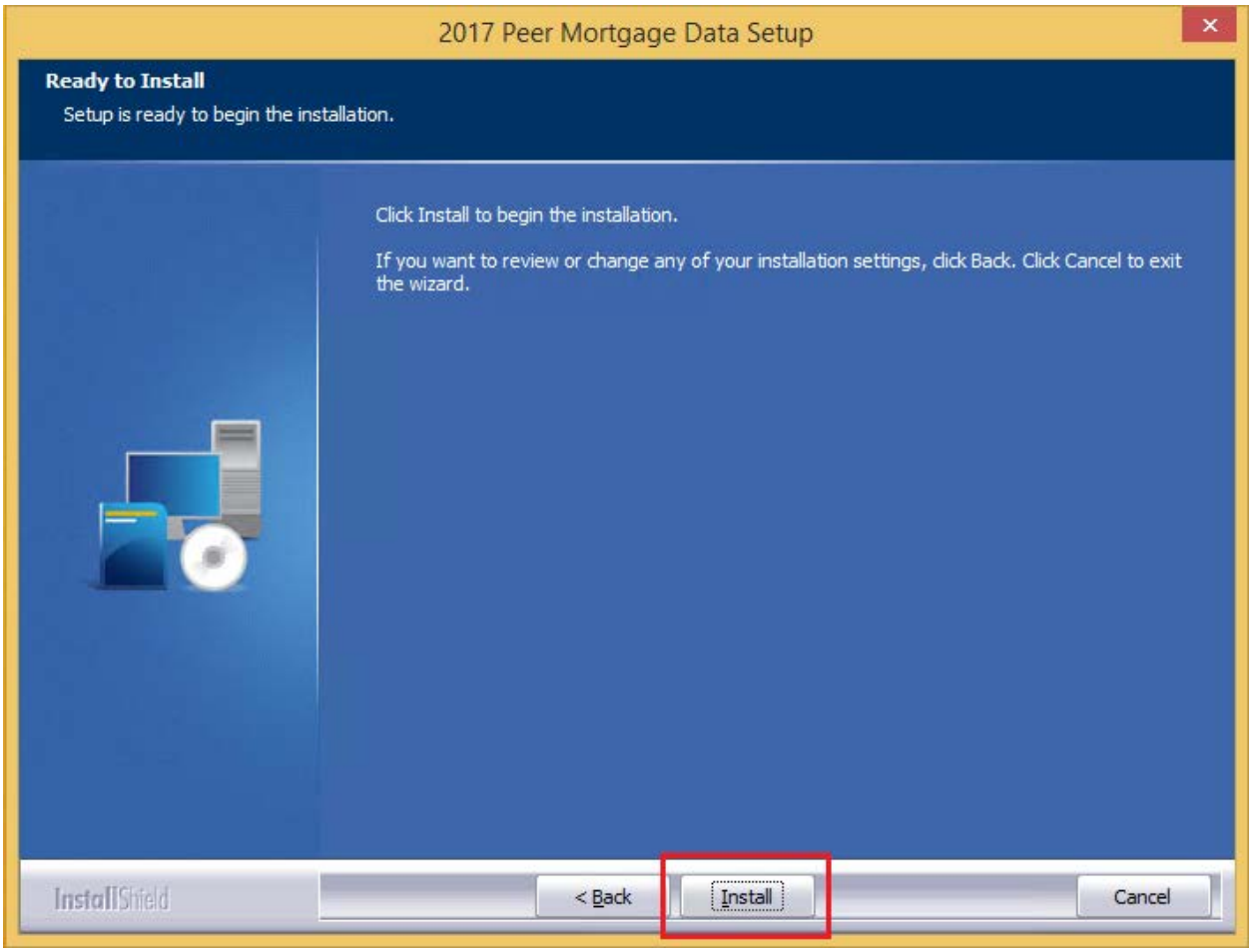
2. Choose one of the following authentication options:
   - Use Windows Authentication
   - Use SQL Server Authentication - If you select this option, you must also enter your SQL Server account **User Name** and **Password** in the **User Name** and **Password** fields.

3. Click the **Next** button.

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

Ready to Install Screen

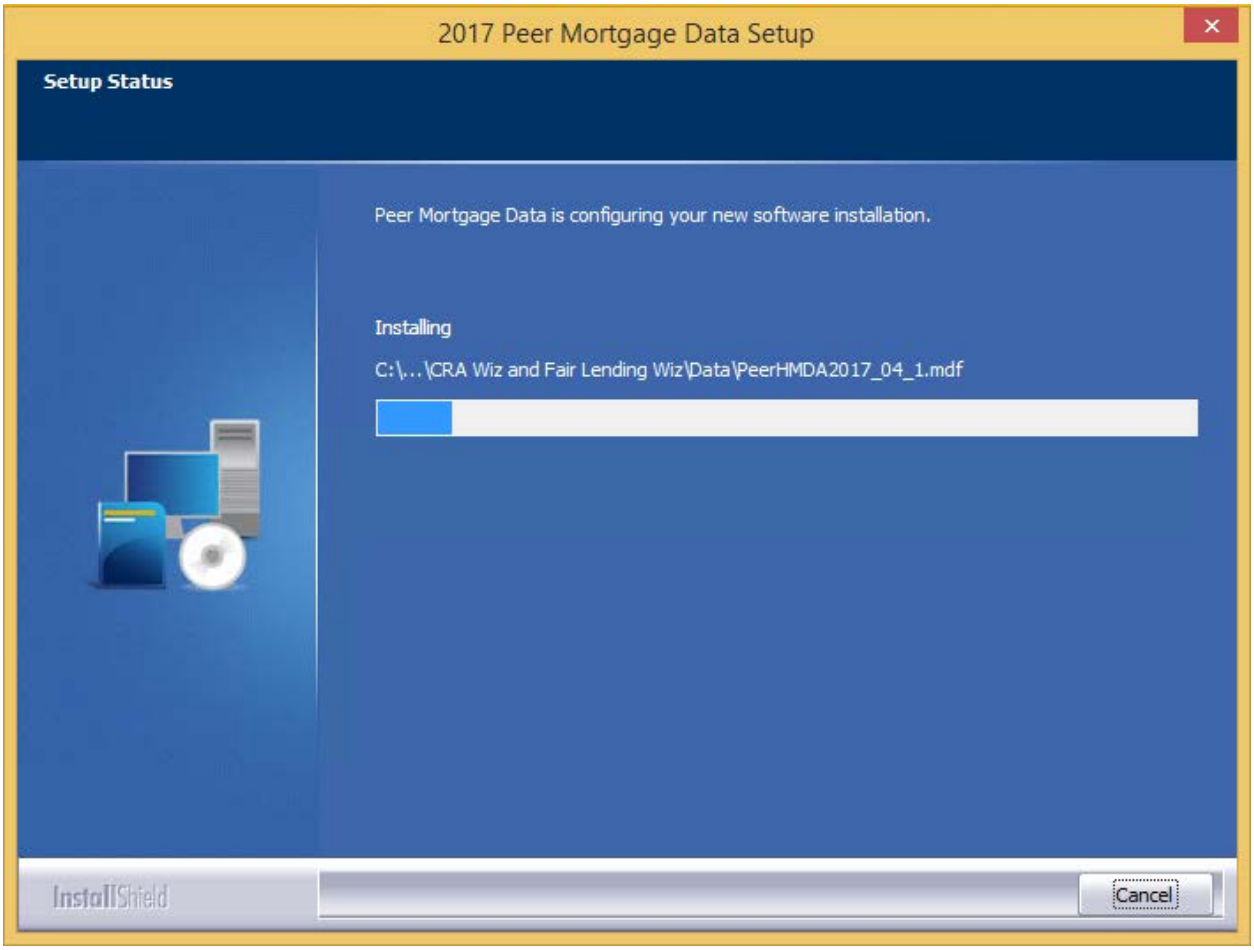
To begin installing the data sets, click the **Install** button:



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

Setup Status Screen

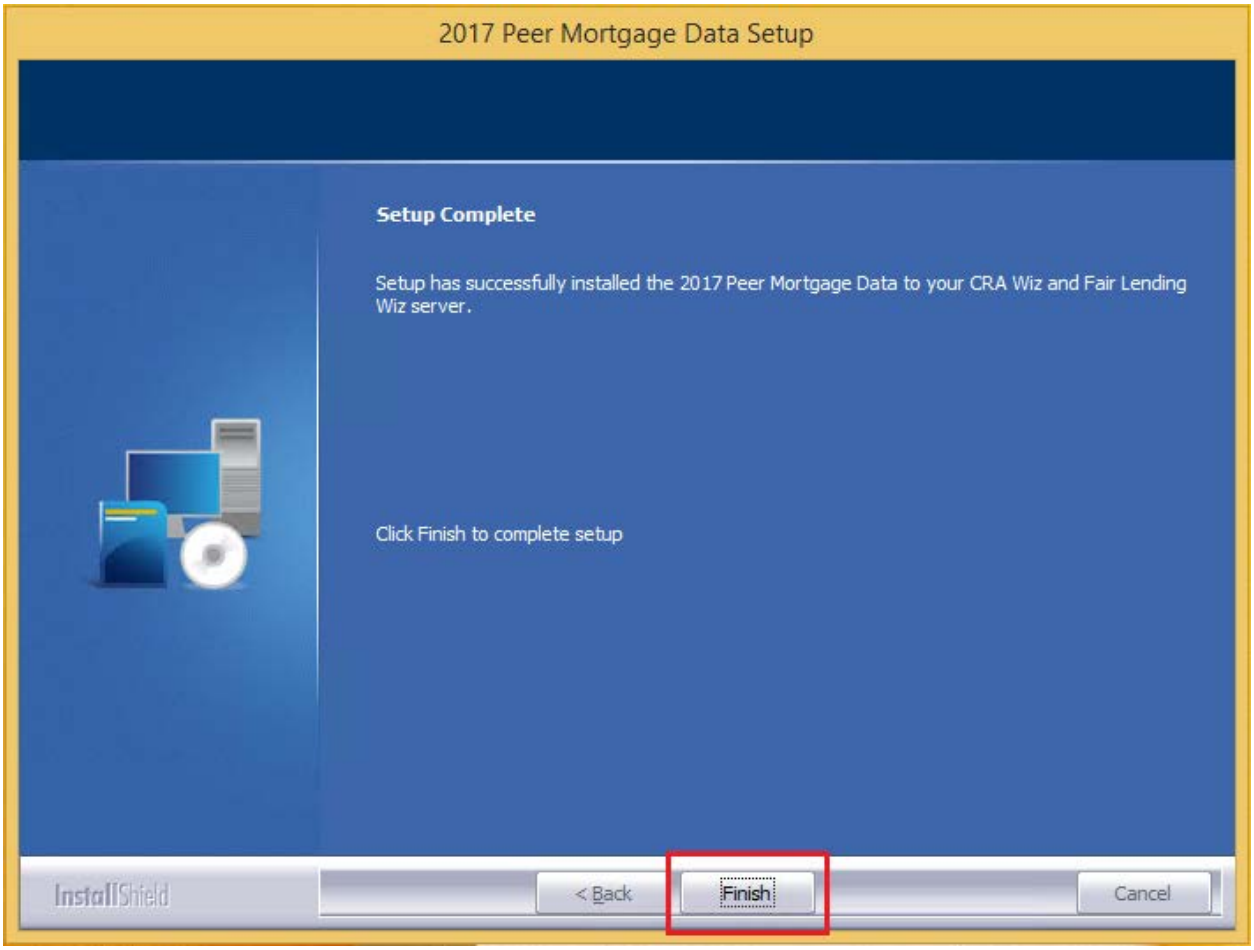
The **Setup Status** screen displays a progress bar that reports the progress of the installation:



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

Setup Complete Screen

Click the **Finish** button:



Installation is complete.

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

800.261.3111

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