Wolters Kluwer

Installation Instructions and Release Notes

June 2021

Governance, Risk & Compliance

CRA *Wiz* and Fair Lending *Wiz*:

2020 Peer Mortgage Data- **Final**

Content

1	**Overview**	**3**
1.1	Who should install	4
1.2	Prerequisites	4
1.3	Required permissions	4
1.4	Required free space	4
1.5	Approximate install time	4
1.6	Confirming installation	4
1.7	Wolters Kluwer Technical Support Contact Information	5
2	**Installation Instructions**	**6**
2.1	Welcome Screen	6
2.2	Database Server Login Screen	8
2.3	Ready to Install Screen	9
2.4	Setup Status Screen	10
2.5	Setup Complete Screen	11

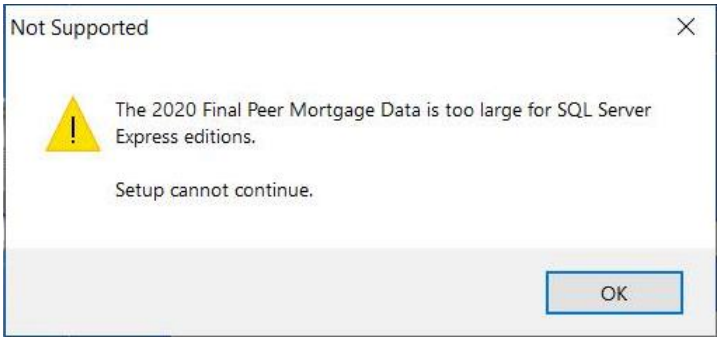
© 2021 Wolters Kluwer

1 Overview

Important!
Because of the increase in lending volume in 2020 and database size restrictions in SQL Express, **there are two versions of the 2020 Peer Mortgage Data – Final**:

- ✓ A compressed version that can be used with SQL Express Edition 2016 Service Pack 1 or later, SQL Standard Edition 2016 Service Pack 1 or later, or any version of SQL Enterprise Edition.
- ✓ An uncompressed version for users of SQL Standard or Enterprise editions.

The uncompressed version of 2020 Peer Mortgage Data – Final can be installed only on full editions of SQL. If you are using SQL Express, **the software displays the following message indicating the data is too large for SQL Server Express editions**:



For more information on which version of the 2020 Peer Mortgage Data - Final you should install based on your SQL version, please refer to the following table:

SQL Type	Express Edition	Standard Edition	Enterprise Edition
SQL 2012	**Contact Support***	Decompressed	Either Compressed or Decompressed
SQL 2014	**Contact Support***	Decompressed	Either Compressed or Decompressed
SQL 2016 (prior to SP1)	**Contact Support***	Decompressed	Either Compressed or Decompressed
SQL 2016 (SP1 or greater)	Compressed	Either Compressed or Decompressed	Either Compressed or Decompressed
SQL 2017	Compressed	Either Compressed or Decompressed	Either Compressed or Decompressed
SQL 2019	Compressed	Either Compressed or Decompressed	Either Compressed or Decompressed

***Contact Wolters Kluwer Technical Support to request a custom cut of the data.**

On June 17th, 2021, The Federal Financial Institutions Examination Council (FFIEC) posted the final release of the 2020 Snapshot on Mortgage Lending.

The data include a total of 48 data points providing information about the applicants, the property securing the loan or proposed to secure the loan in the case of non-originated applications, the

© 2021 Wolters Kluwer

transaction, and identifiers. This update allows users to incorporate this data into their CRA *Wiz* and Fair Lending *Wiz* reporting and analysis.

This release of the data contains **25,551,868** records from **4,475** institutions.

Data source
FFIEC / CFPB HMDA Snapshot

1.1 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**.

1.2 Prerequisites

CRA *Wiz* and Fair Lending *Wiz* 7.5 recommended. 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 "75.XX" are acceptable.

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

1.3 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 recommends that the user running the install have both a Windows admin and SQL Server Admin login credentials.

1.4 Required free space

Uncompressed - 12.2 gigabytes (GB) (recommended)
Compressed – 4.3 gigabytes (GB) (recommended)

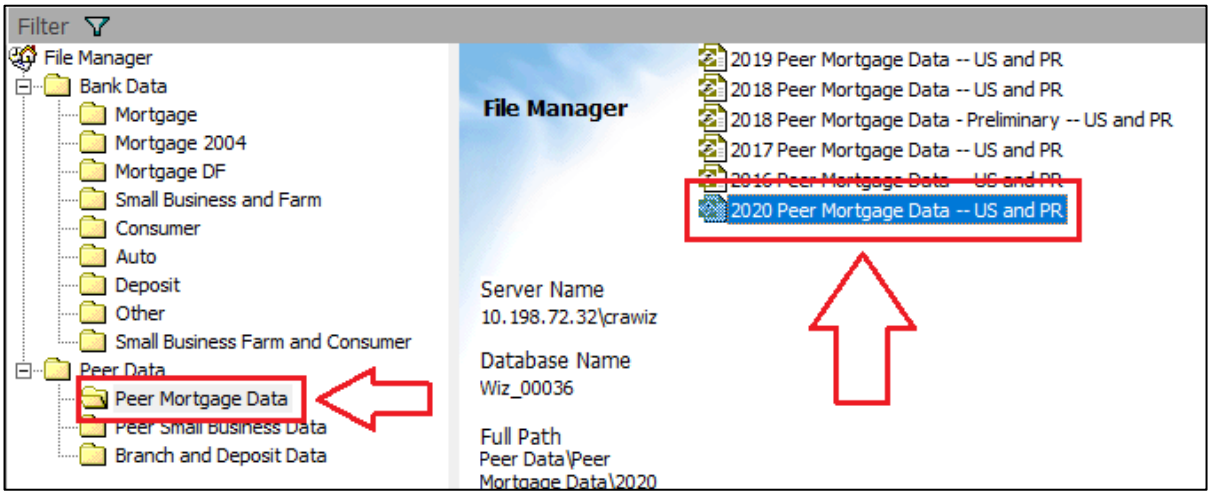
1.5 Approximate install time

Uncompressed - 6 minutes, depending on hardware configuration and specifications.
Compressed – 6 minutes, depending on hardware configuration and specifications.

1.6 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 **2020 Peer Mortgage Data - US and PR** in the **Peer Mortgage Data** folder of the **File Management** screen:

© 2021 Wolters Kluwer



Note: The CRA *Wiz* and Fair Lending *Wiz* build number (as found in **Help** > **About CRA Wiz**) is **not** updated by the 2020 Peer Mortgage Data - Final installer.

1.7 Wolters Kluwer Technical Support Contact Information

Please contact us if you have any questions regarding this update of if you need any help with the installation:

1-800-261-3111 ext. 1123208
CRAWizSupport@wolterskluwer.com

© 2021 Wolters Kluwer

2 Installation Instructions

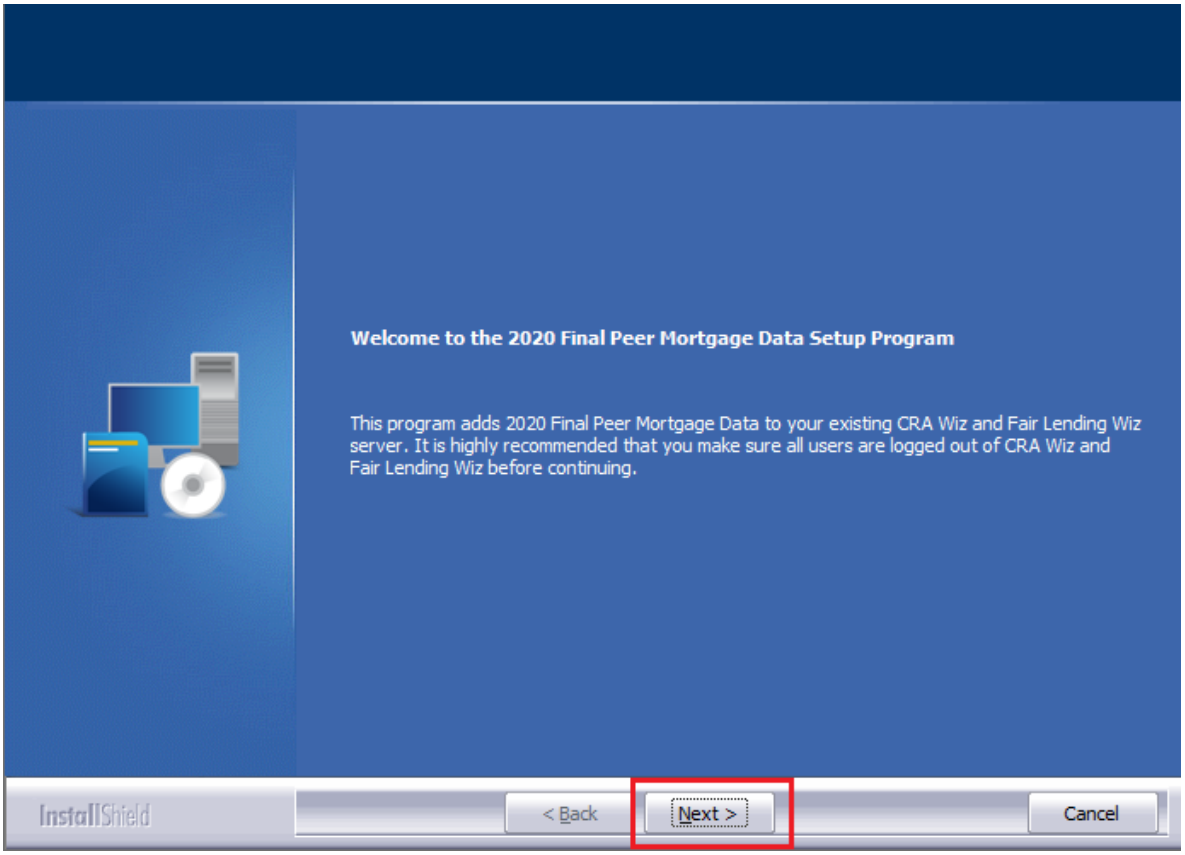
Important!
The following procedures cover installing both the **compressed** and **uncompressed** versions of the 2020 Peer Mortgage Data – Final. Both installers contain the same data, but you need to install only one depending on the SQL Server version you are using.

To install **2020 Peer Mortgage Data – Final**, 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 **2020PeerMortgageDataFinal or 2020PeerMortgageDataFinalCompressed** installation file.
   The installer displays the **Welcome** screen.
2. Follow the directions for each of the following screens.

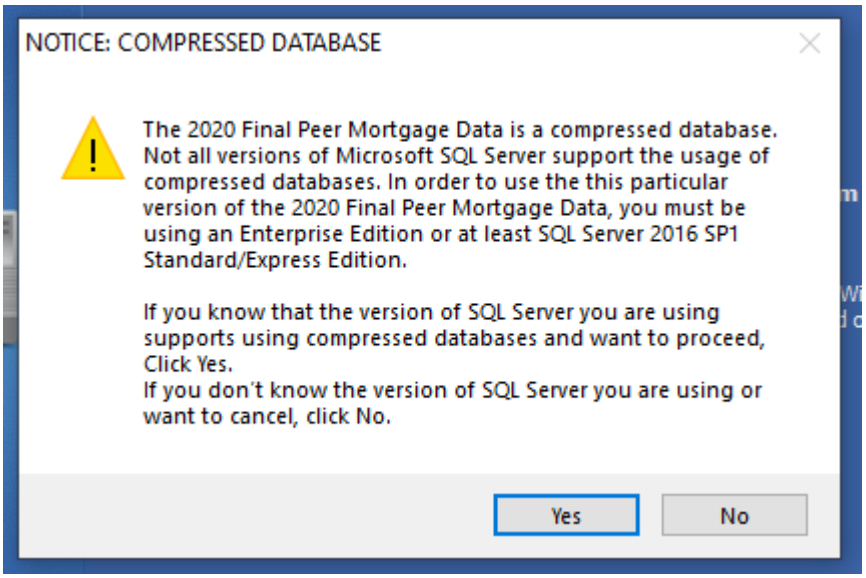
2.1 Welcome Screen

Click the **Next** button:



© 2021 Wolters Kluwer

Important!
If you are installing the **compressed version** of the 2020 Peer Mortgage Data – Final, the software displays a message indicating that not all versions of Microsoft SQL Server support compressed databases. For more information, refer to the information in the Overview section of this document:

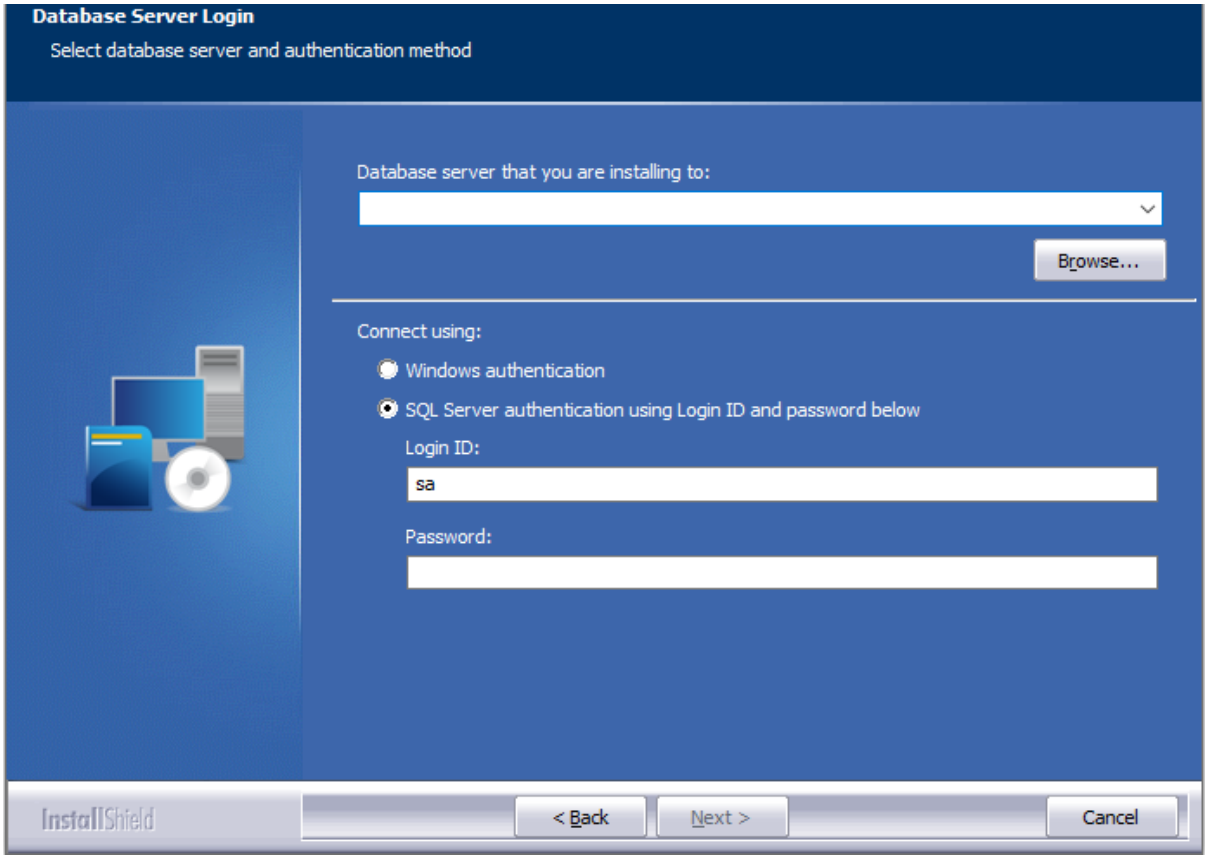


The software displays the **Database Server Login** screen.

© 2021 Wolters Kluwer

2.2 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.

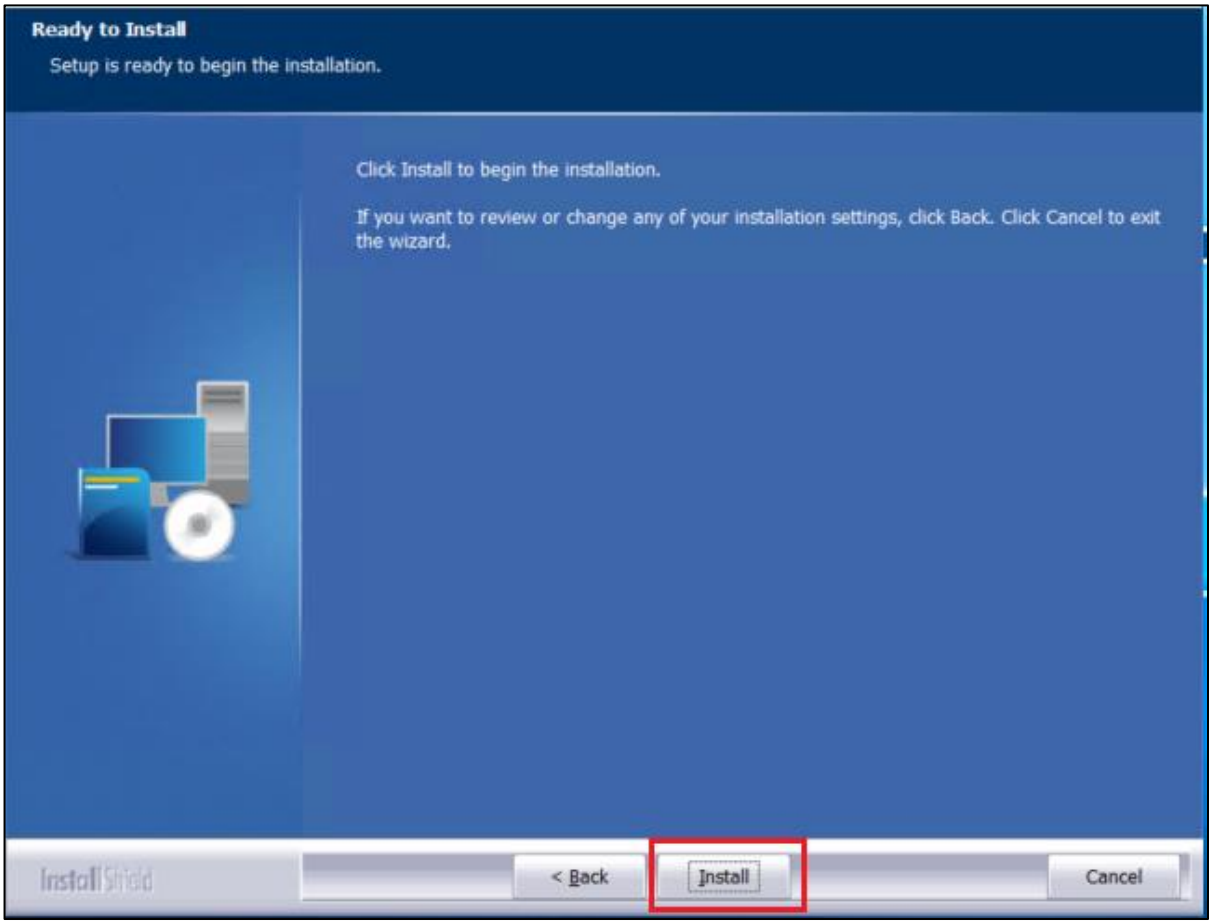
3. Click the **Next** button.

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

© 2021 Wolters Kluwer

2.3 Ready to Install Screen

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

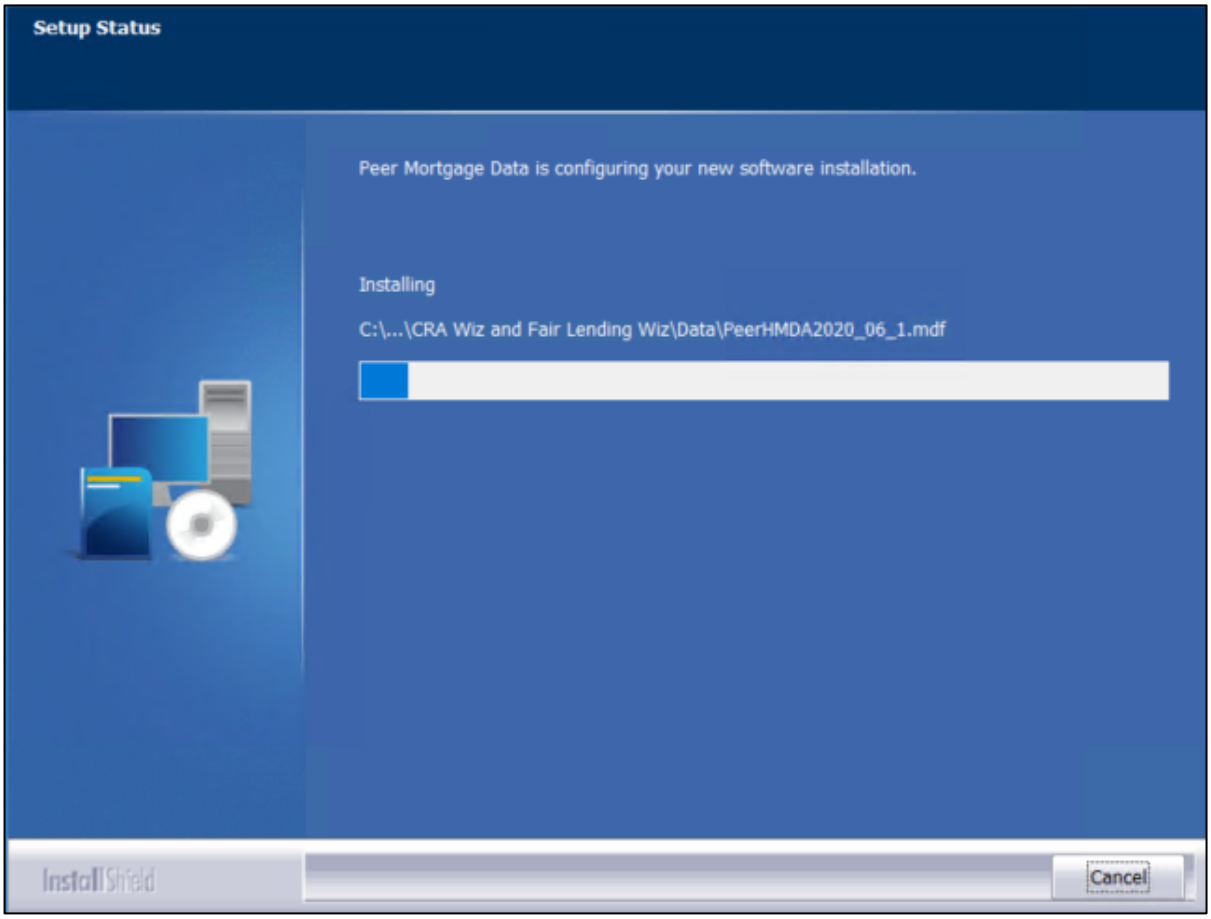


The installer displays the **Setup Status** screen.

© 2021 Wolters Kluwer

2.4 Setup Status Screen

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

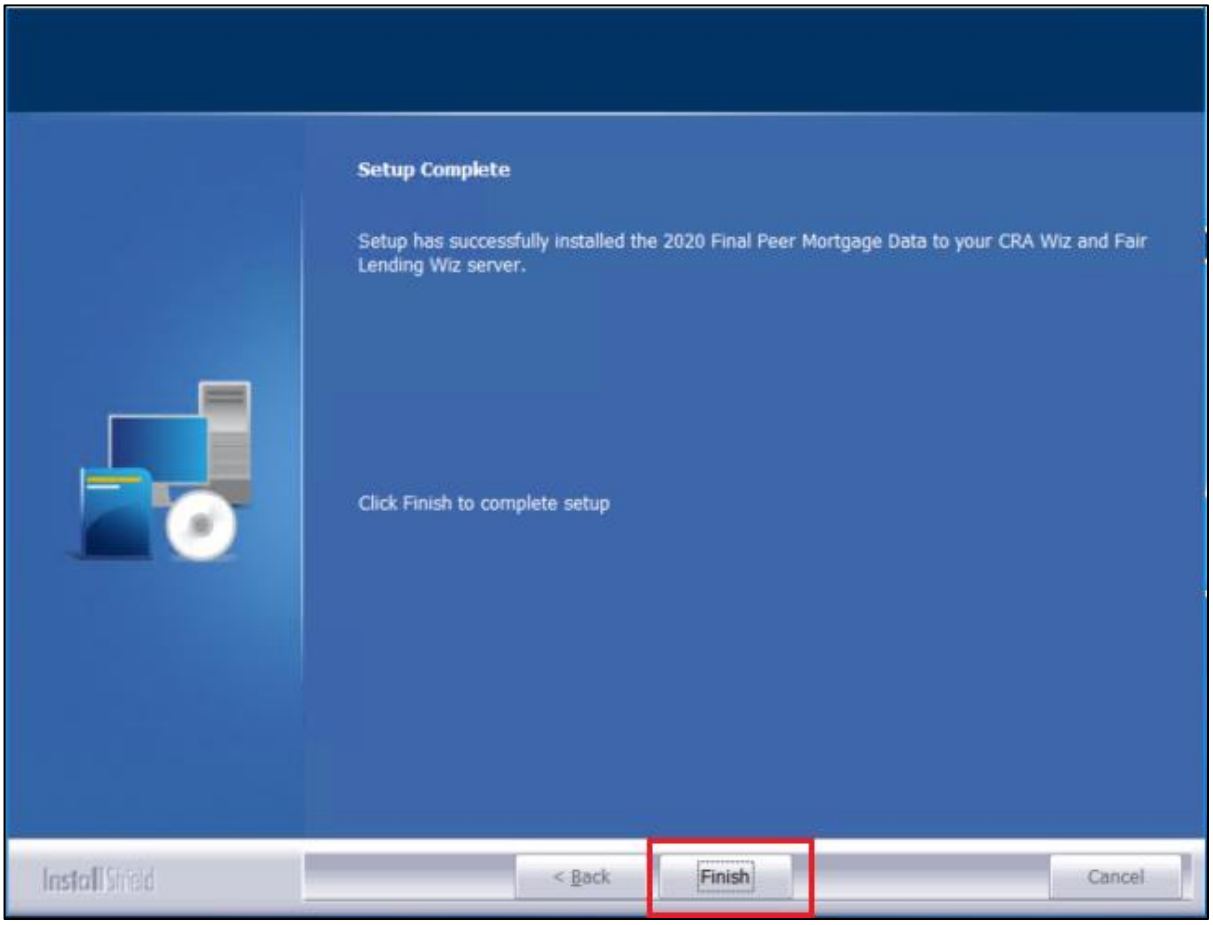


When installation is complete, the installer displays the **Setup Complete** screen.

© 2021 Wolters Kluwer

2.5 Setup Complete Screen

Click the **Finish** button:



Installation is complete.

© 2021 Wolters Kluwer

About Wolters Kluwer: Wolters Kluwer 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 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 is 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.

Confidentiality Notice: This docment contains privileged information that is intended for the addressee only. If you are not an intended recipient of the original sender (or responsible for delivering the message to such person), you are hereby notified that any review, disclosure, copying, distribution or the taking of any action in reliance of the contents of and links to attachments in the document is strictly prohibited. If you have received this in error, please immediately notify the sender and permanently delete any copies of this document (digital or paper) in your possession.

Wolters Kluwer

230 3rd Ave.
Waltham, MA
02453

800.261.3111