

Installation Instructions and  
Release Notes

June 2022

Governance, Risk & Compliance

CRA *Wiz* and Fair Lending *Wiz*:

2021 Peer Mortgage Data- **Final**

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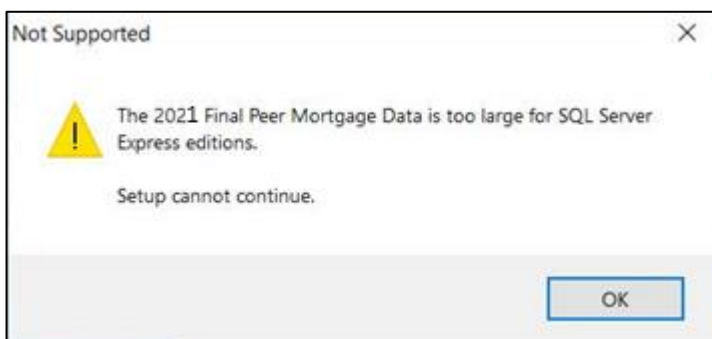
# 1 Overview

## Important!

Because of the increase in lending volume in 2021 and database size restrictions in SQL Express, **there are two versions of the 2021 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 2021 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 2021 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, 2022, The Federal Financial Institutions Examination Council (FFIEC) posted the final release of the 2021 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

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 **26,124,552** records from **4,333** 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** - 14 gigabytes (GB) (recommended)

**Compressed** – 5.5 gigabytes (GB) (recommended)

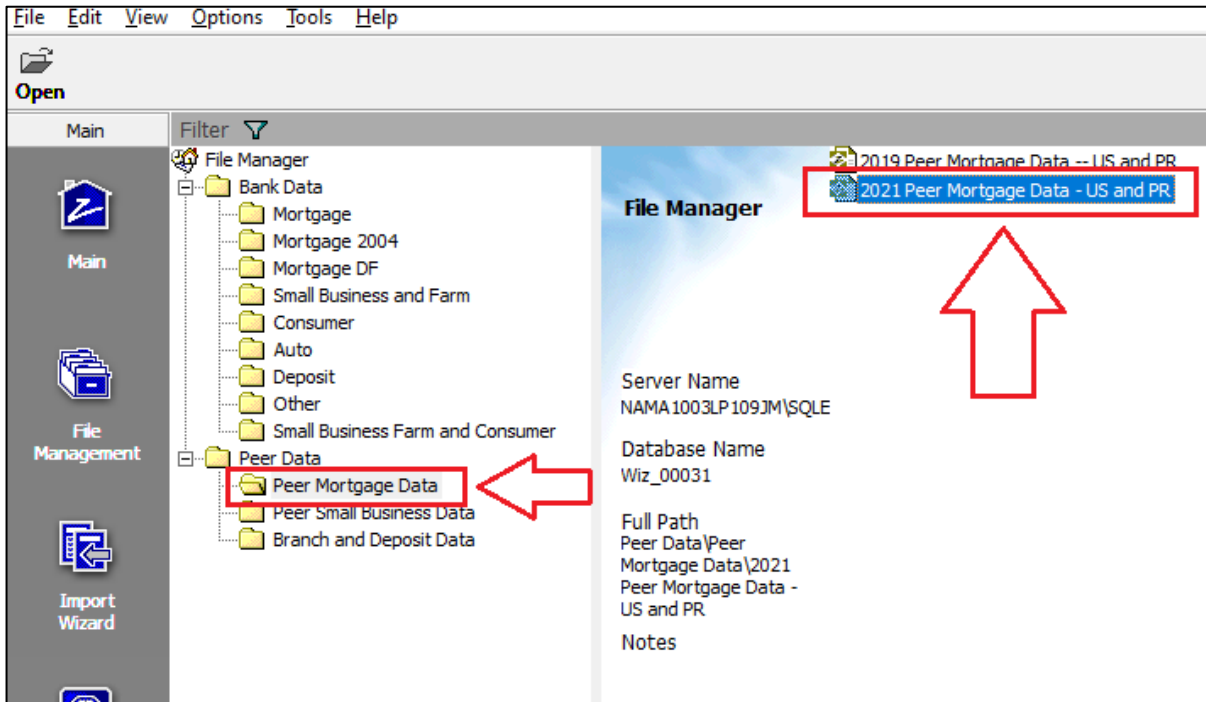
## 1.5 Approximate install time

**Uncompressed** – six (6) minutes, depending on hardware configuration and specifications.

**Compressed** – three (3) 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 **2021 Peer Mortgage Data - US and 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 2021 Peer Mortgage Data - Final installer.

### 1.7 Wolters Kluwer Technical Support Contact Information

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

**1-800-261-3111 ext. 1123208**

[CRAWizSupport@wolterskluwer.com](mailto:CRAWizSupport@wolterskluwer.com)

## 2 Installation Instructions

### Important!

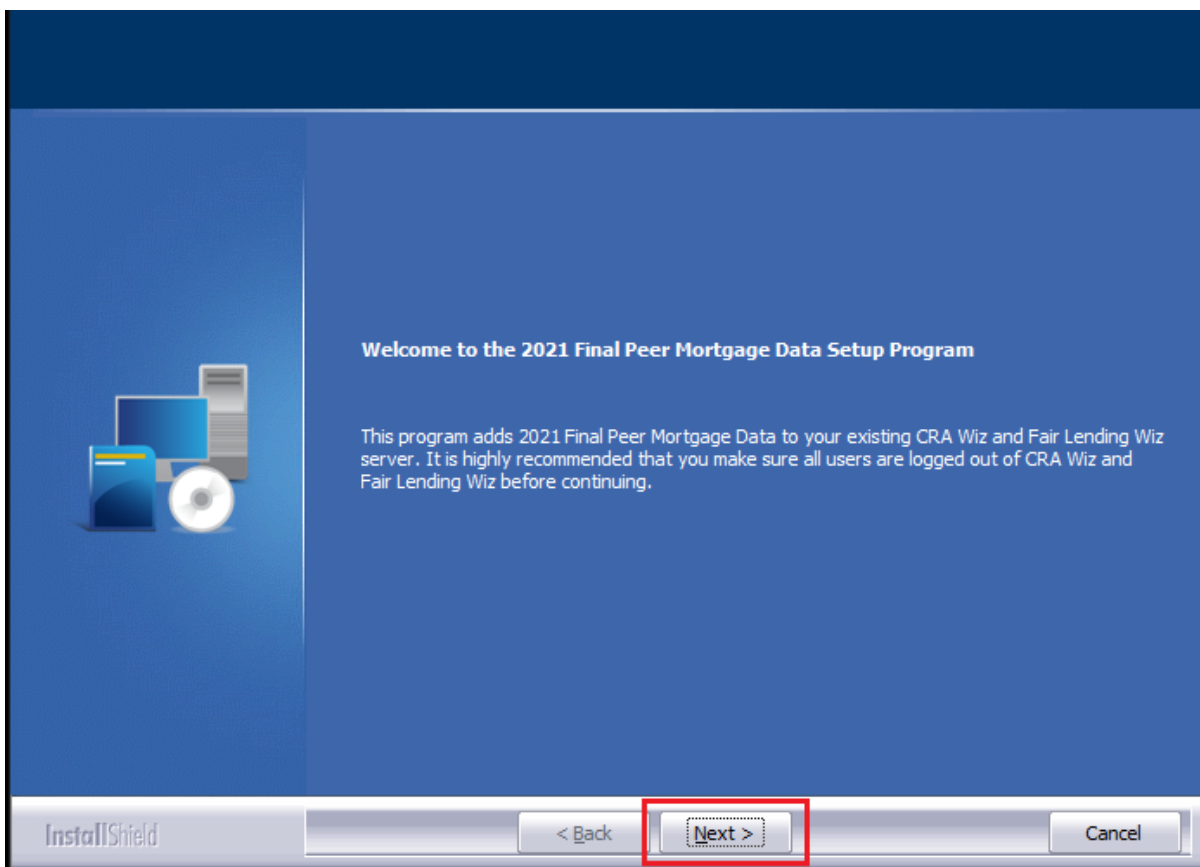
The following procedures cover installing both the **compressed** and **uncompressed** versions of the 2021 Peer Mortgage Data – Final. Both installers contain the same data, but you need to install only one depending on the SQL Server version you are using.

To install **2021 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 **2021PeerMortgageDataFinal** or **2021PeerMortgageDataFinalCompressed** installation file.  
The installer displays the **Welcome** screen.
2. Follow the directions for each of the following screens.

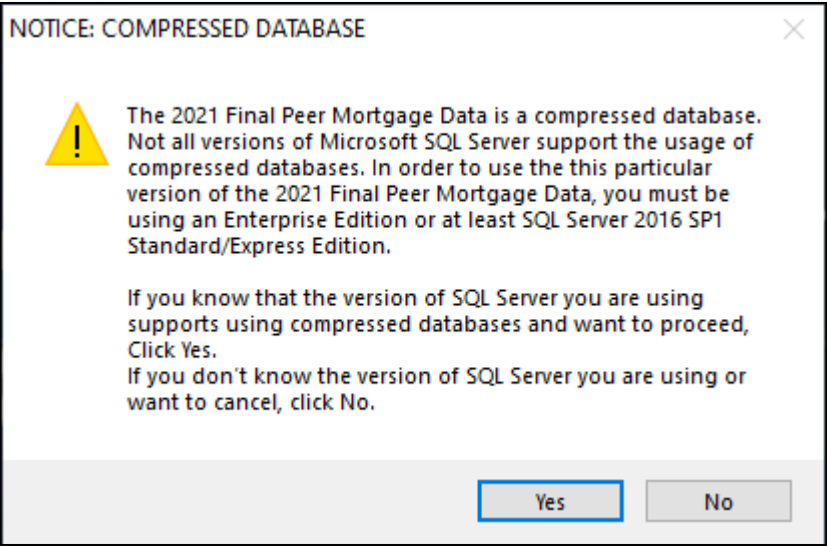
### 2.1 Welcome Screen

Click the **Next** button:



### Important!

If you are installing the **compressed version** of the 2021 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.

## 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:

**Database Server Login**  
Select database server and authentication method

Database server that you are installing to:  
[Dropdown menu] [Browse...]

Connect using:  
 Windows authentication  
 SQL Server authentication using Login ID and password below

Login ID:  
sa

Password:  
[Text input field]

InstallShield [ < Back ] [ Next > ] [ Cancel ]

To configure SQL Server options, follow these steps:

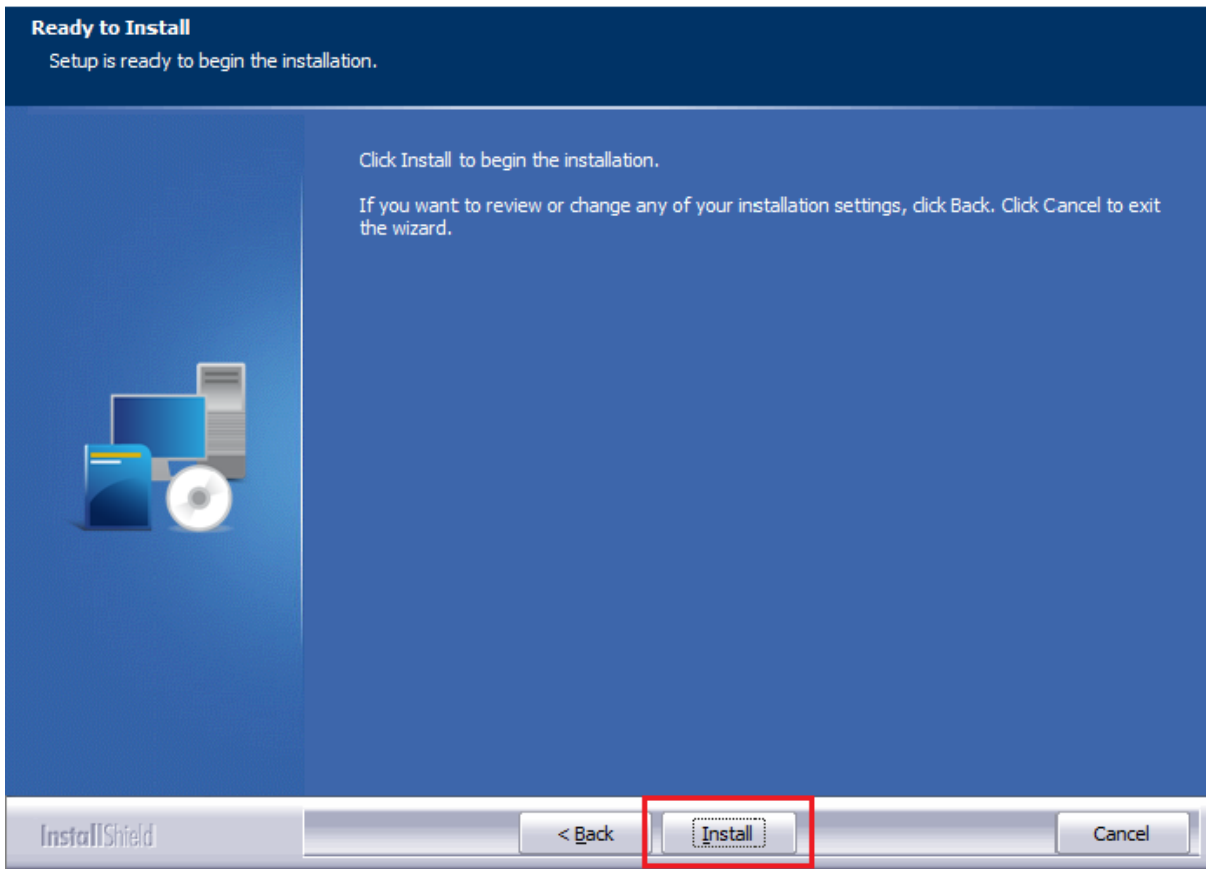
1. Do one of the following:
  - In the **Database server that you are installing to** field, enter the **SQL Server name and instance** to which you are installing the data.  
  
**Example:** SVRBOS01\SQLEXPRESS
  - Click the **Browse** button and in the resultant dialog box, select the SQL Server.
2.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



## 2.3 Ready to Install Screen

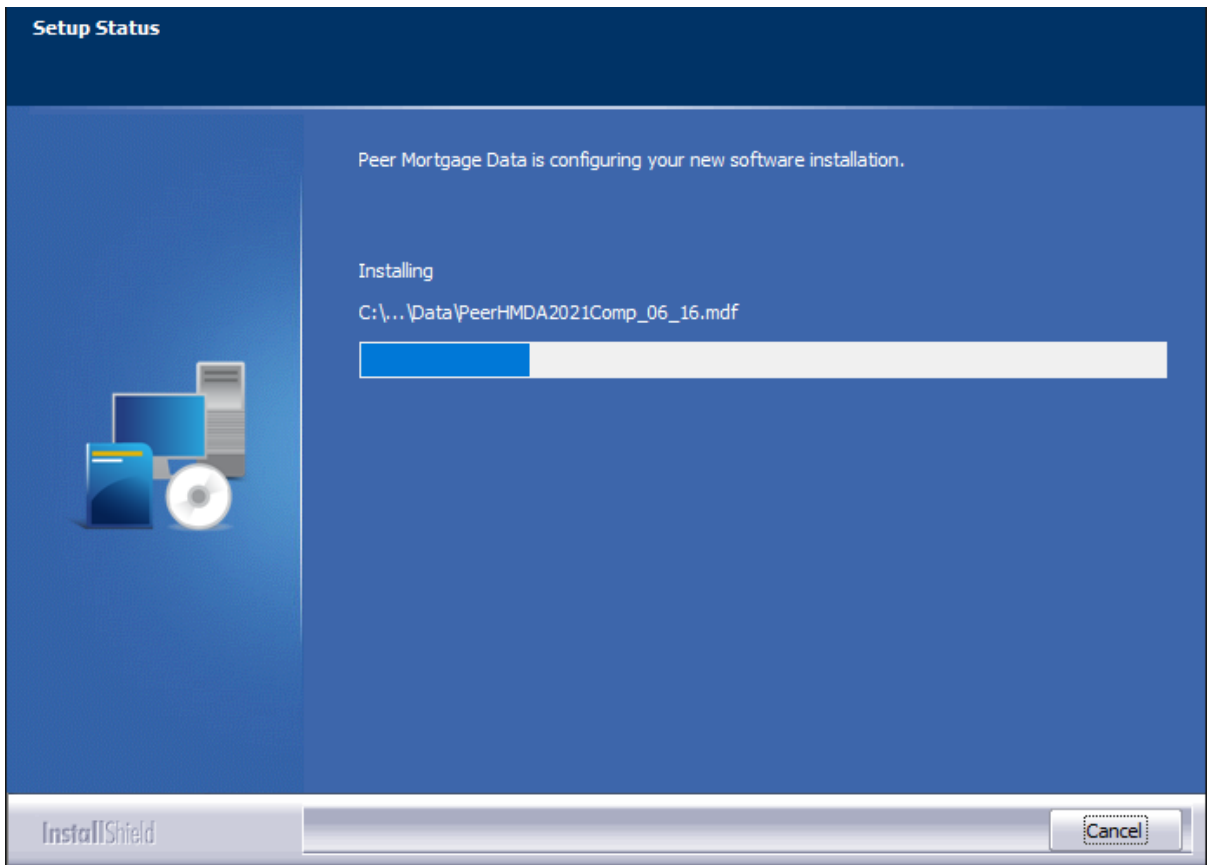
To begin installing the data sets, click the **Install** button:



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

## 2.4 Setup Status Screen

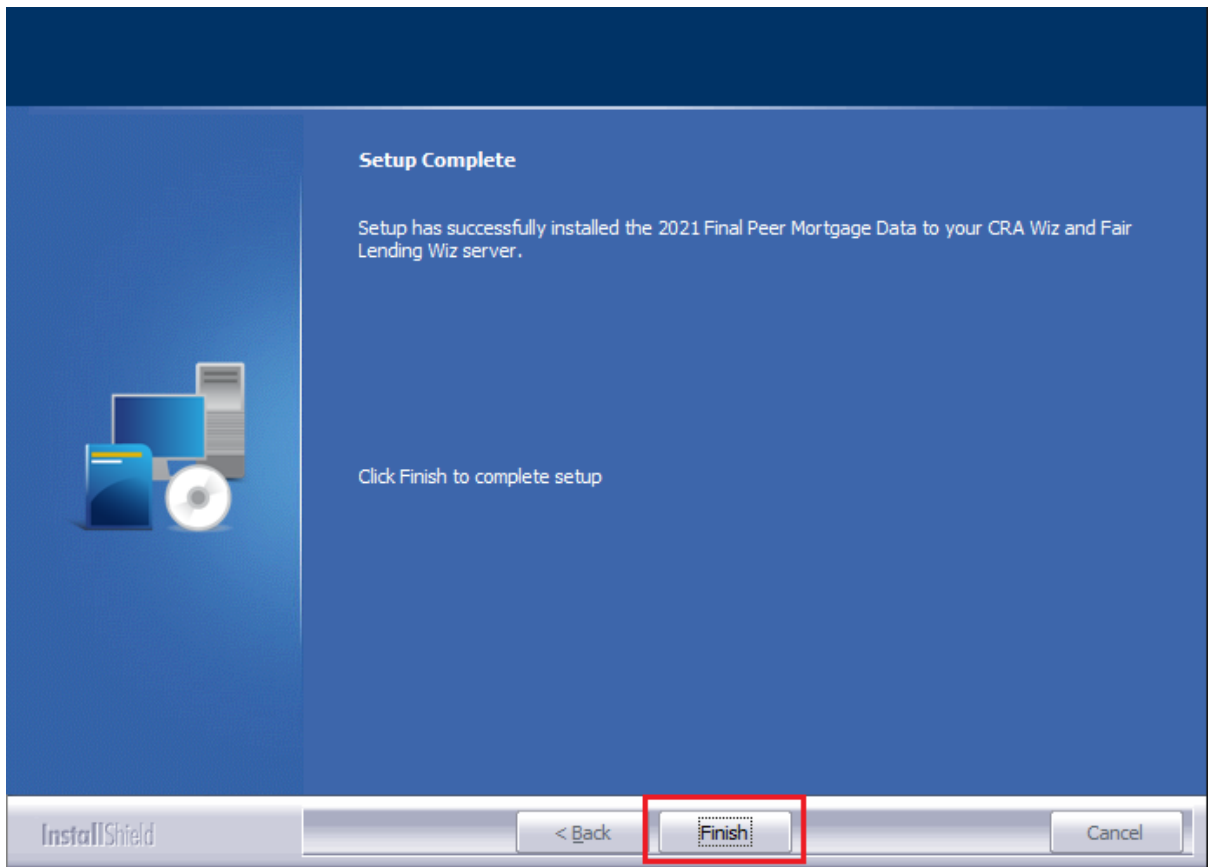
The **Setup Status** screen displays a progress bar that reports the progress of the installation:



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

## 2.5 Setup Complete Screen

Click the **Finish** button:



Installation is complete.

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