

Installation Instructions and
Release Notes

July 2023

Governance, Risk & Compliance

CRA *Wiz* and Fair Lending *Wiz*:

2022 Peer Mortgage Data- **Final**

Content

1	Overview	3
1.1	Who should install	3
1.2	Prerequisites	3
1.3	Required permissions	3
1.4	Required free space	3
1.5	Approximate install time	3
1.6	Confirming installation	3
1.7	Wolters Kluwer Technical Support Contact Information	4
2	Installation Instructions	5
2.1	Welcome Screen	5
2.2	Database Server Login Screen	7
2.3	Ready to Install Screen	8
2.4	Setup Status Screen	9
2.5	Setup Complete Screen	10

1 Overview

On June 29th, 2023, the Federal Institutions Examination Council (FFIEC) [posted the final release](#) of the 2022 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 **16,080,210** records from **4,460** 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* 7.6 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 "76.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

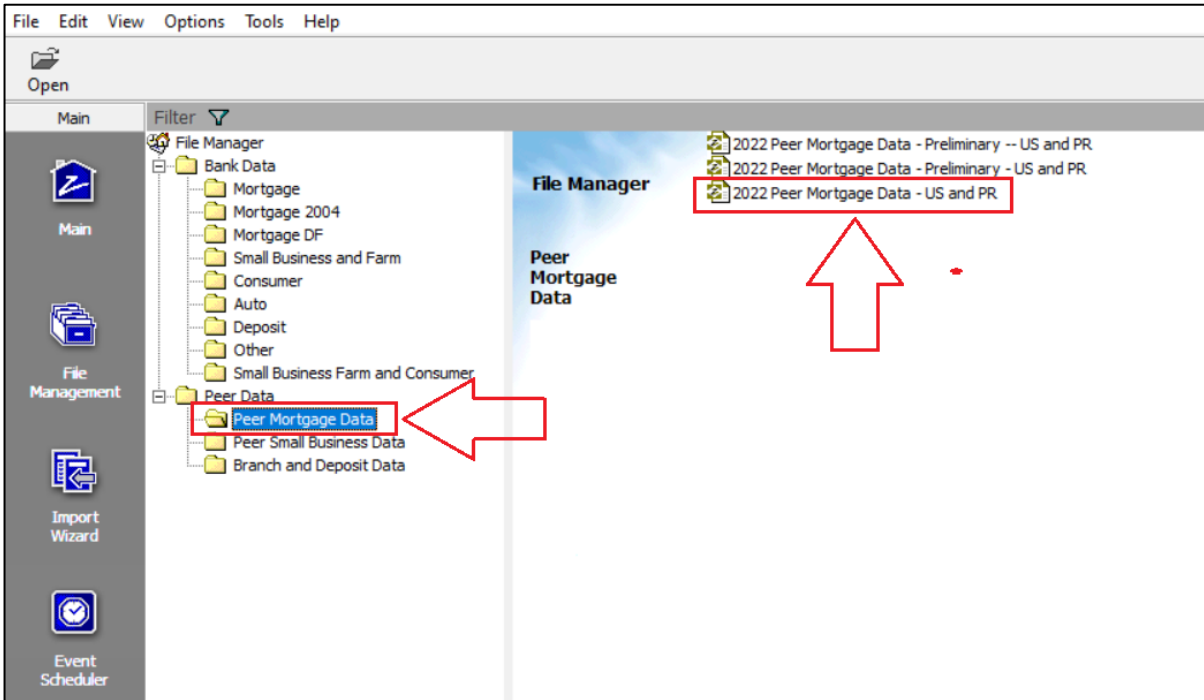
Approximately 3.3 gigabytes (GB) (recommended)

1.5 Approximate install time

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 2020**, located in the **Options** menu bar item. The software will then display a file named **2022 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 2022 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

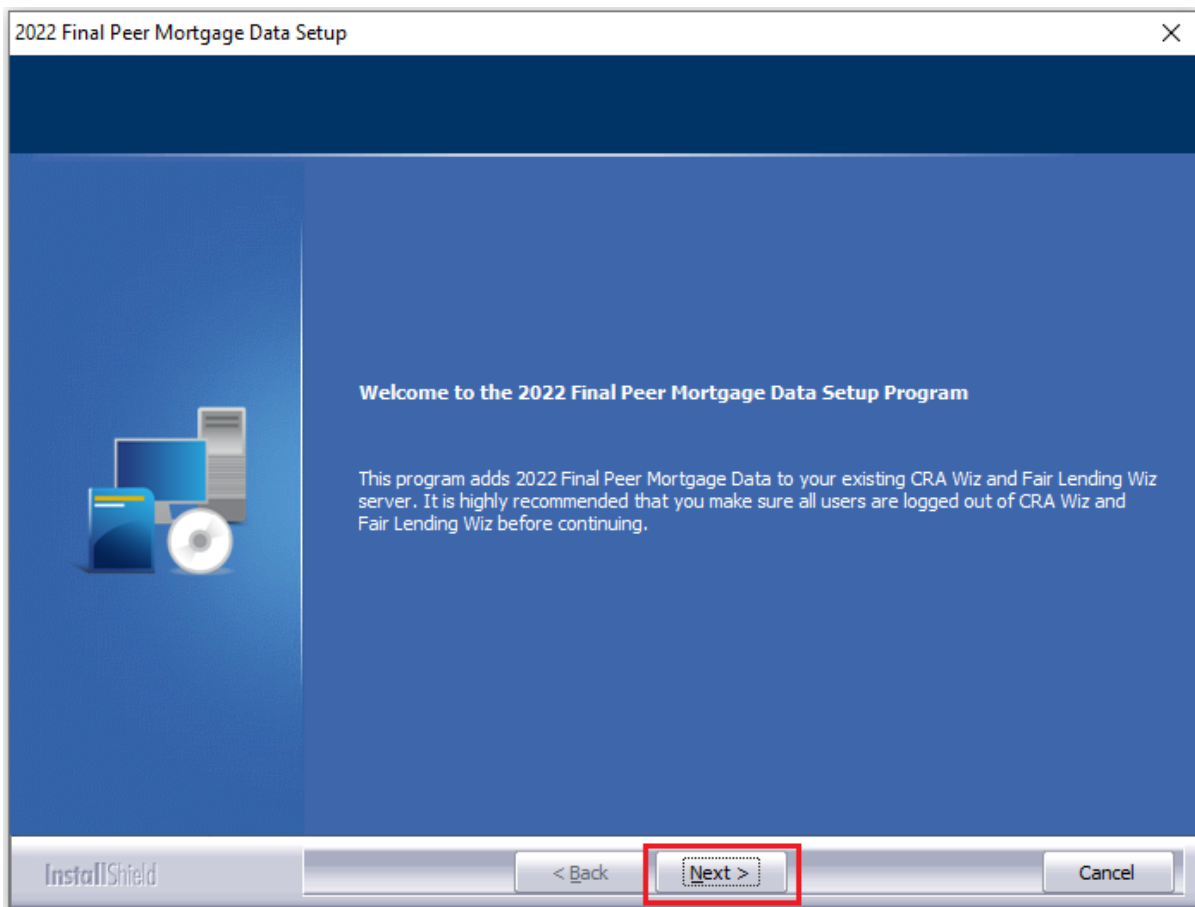
2 Installation Instructions

To install **2022 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 **2022PeerMortgageData.exe** installation file. The installer displays the **Welcome** screen.
2. Follow the directions for each of the following screens.

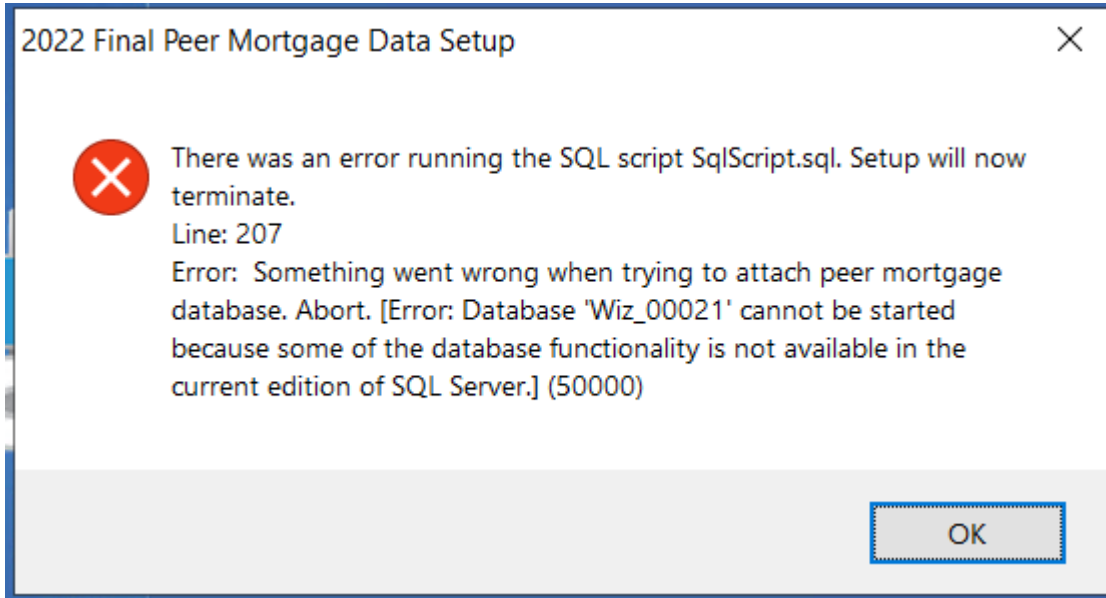
2.1 Welcome Screen

Click the **Next** button:



Important!

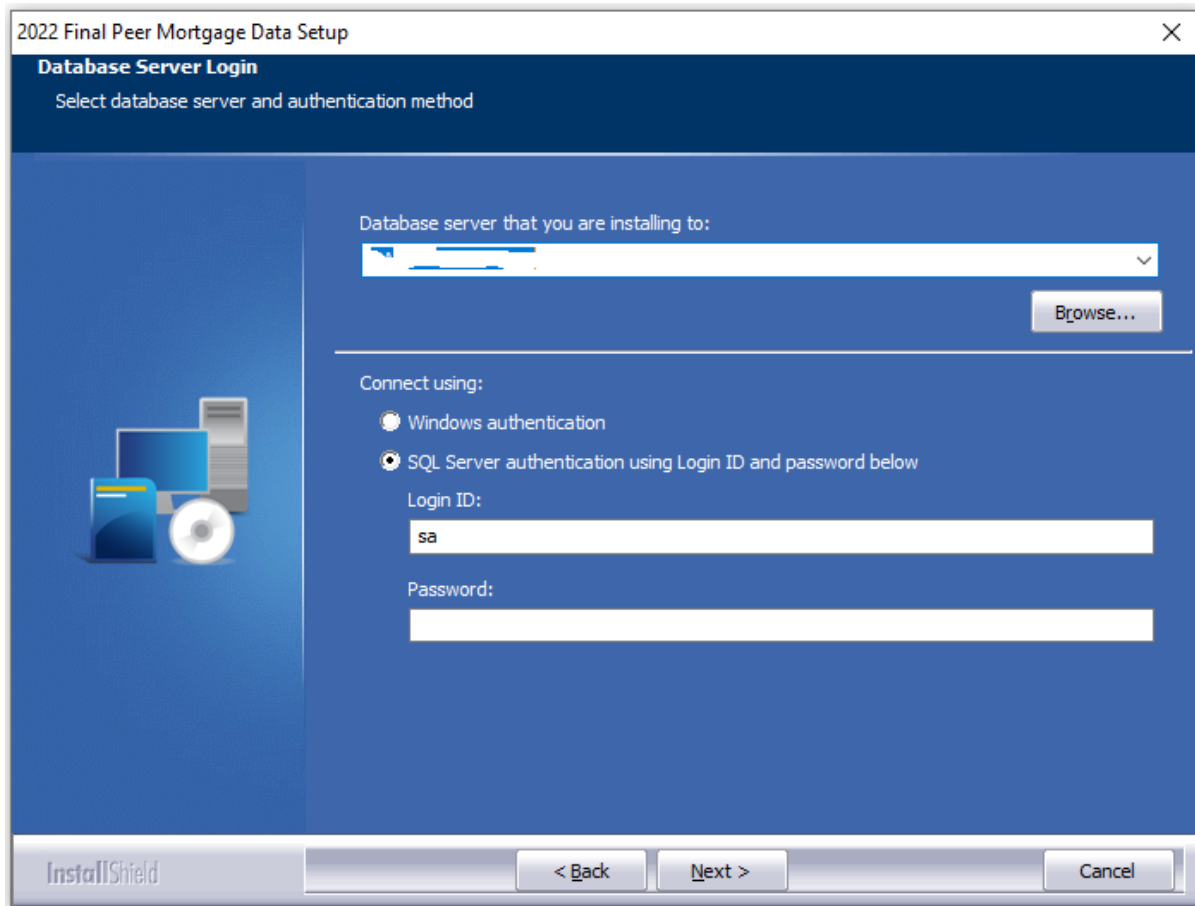
You are installing the **compressed version** of the **2022 Peer Mortgage Data – Final**, the software displays a message indicating that the database functionality is not available in the current edition of SQL Server if you are using a version of SQL that does not support compression, please contact support at crawizsupport@wolterskluwer.com.



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:



To configure SQL Server options, follow these steps:

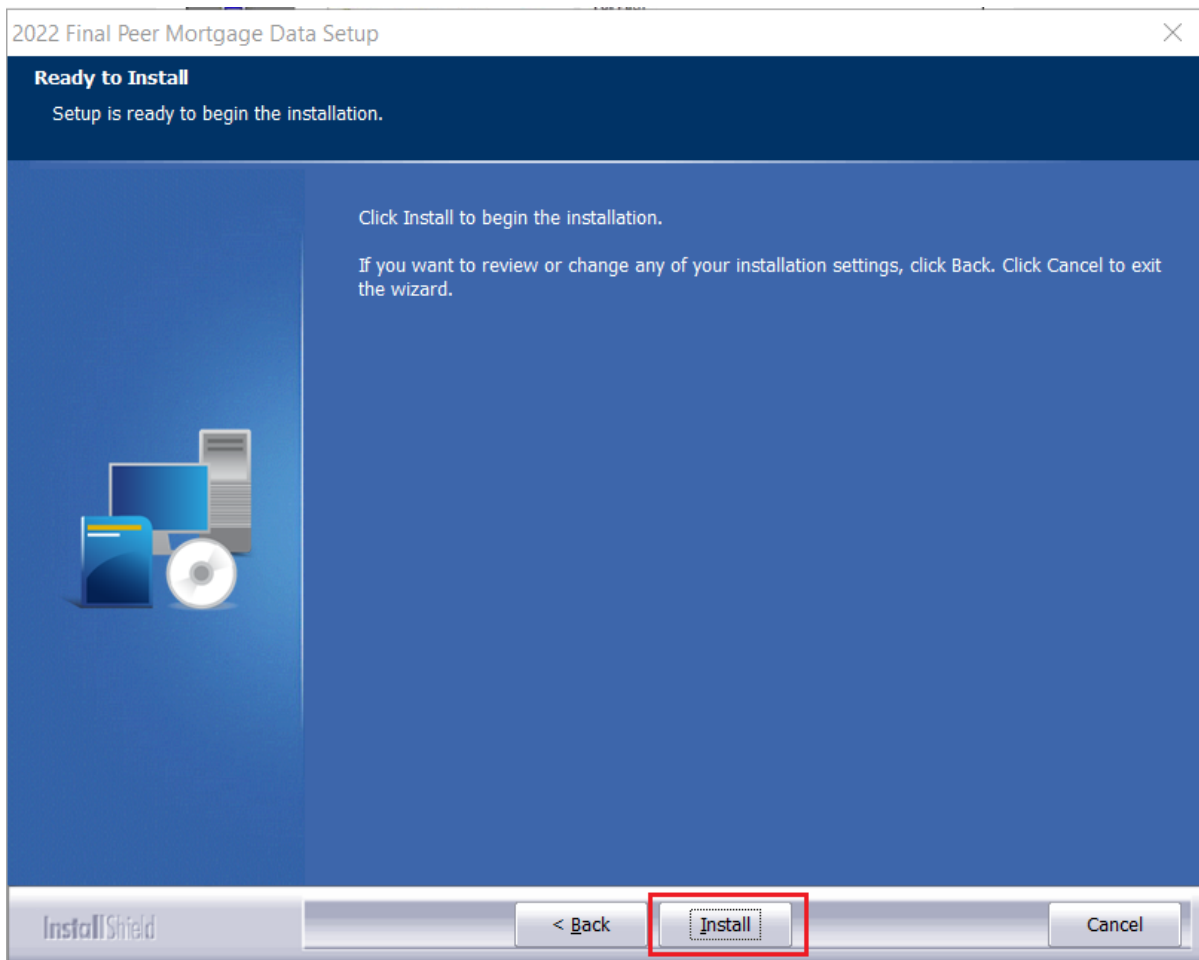
1. Do one of the following:
 - In the **Database server that you are installing to** field, enter the **SQL Server name and instance** to which you are installing the data.

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

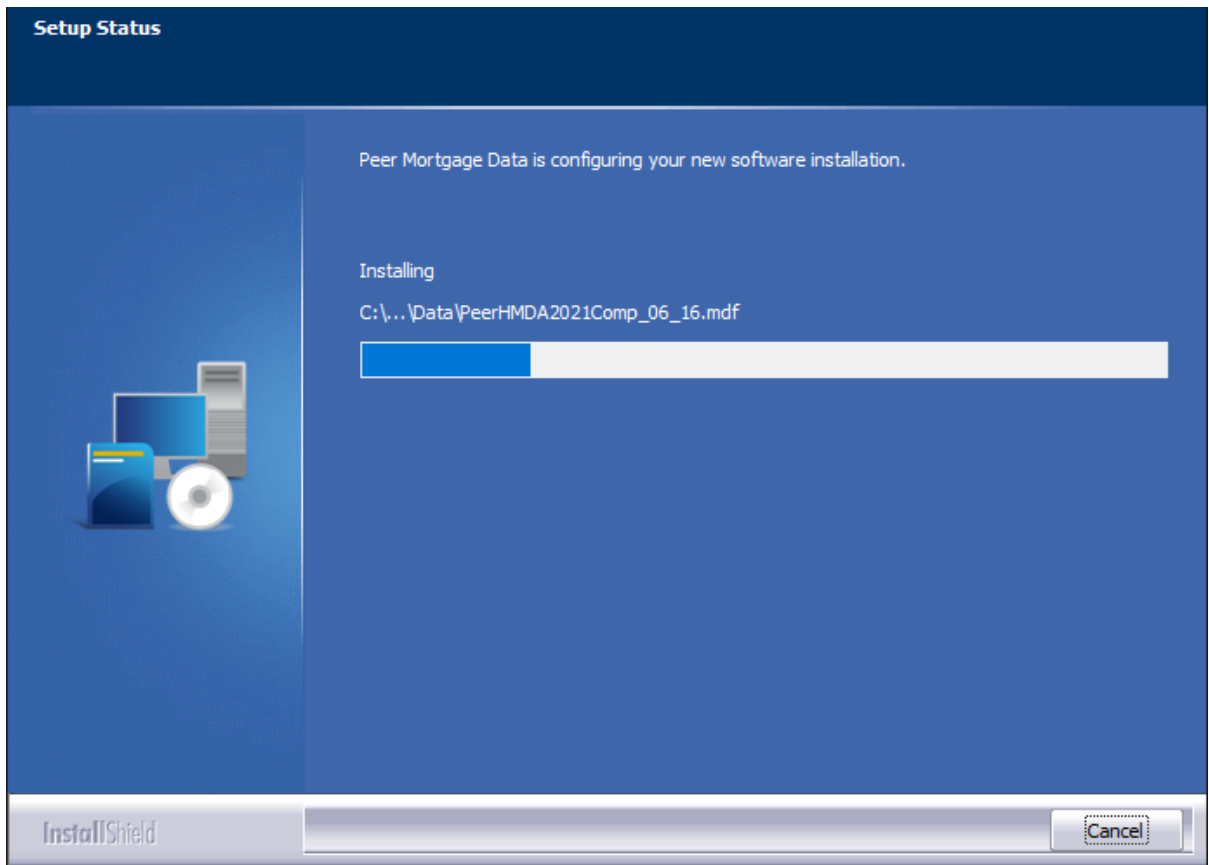
To begin installing the data sets, click the **Install** button:



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

2.4 Setup Status Screen

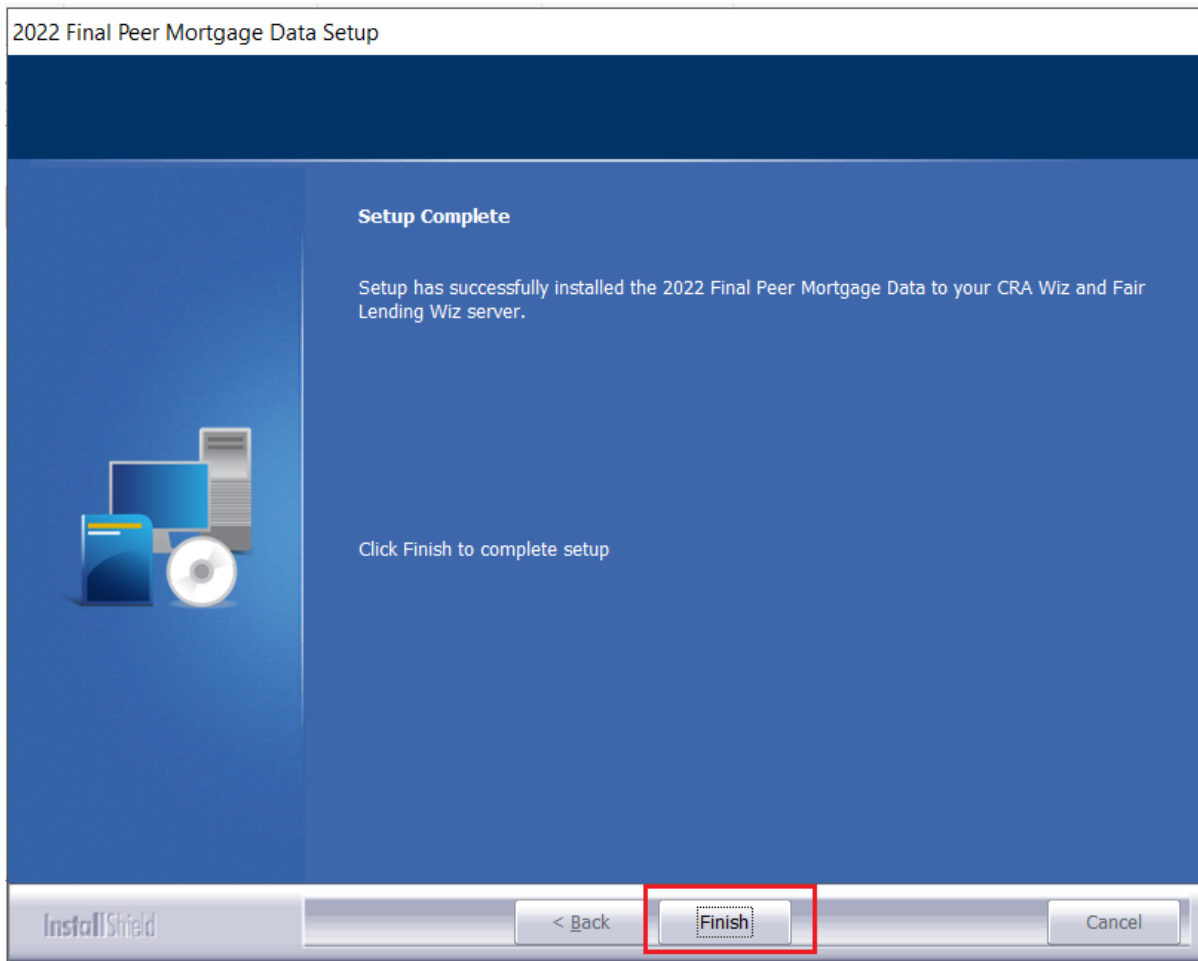
The **Setup Status** screen displays a progress bar that reports the progress of the installation:



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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