

Installation Instructions and
Release Notes

April 2024

Governance, Risk & Compliance

CRA *Wiz* and Fair Lending *Wiz*: 2023 Peer Mortgage Data-**Preliminary**

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1 Overview

On March 26th, 2024, the CFPB [posted the release](#) of the 2023 Individual HMDA Modified LAR. This release is a downloadable LAR available for individual institutions that reported a 2023 HMDA data submission. Wolters Kluwer has built a comprehensive 2023 Peer HMDA Data file from this data as a Preliminary release to use as a standard Peer HMDA file.

Important!

Because the data is only a “snapshot” (as of March 26th download) and does not include all the variables that are normally provided with the annual aggregated Peer Data release, **this is not the final Peer Data release**. This installation will install a Peer HMDA file with the name **2023 Peer Mortgage Data Preliminary – US & PR**. **When the CFPB publishes the National Loan-Level Dataset (expected June 2024), Wolters Kluwer will release final Peer HMDA Data.**

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

1.1 Data source

[FFIEC HMDA Modified LAR](#)

1.2 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**.

1.3 Prerequisites

CRA *Wiz* and Fair Lending *Wiz* 7.7 or higher 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 “77.XX” are acceptable.

Important! For client/server environments, Peer Mortgage data is installed on the **SQL Server only**. **This version can only be installed on SQL Server or SQL Express versions SQL 2016 SP1 or later.**

1.4 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.

1.5 Required free space

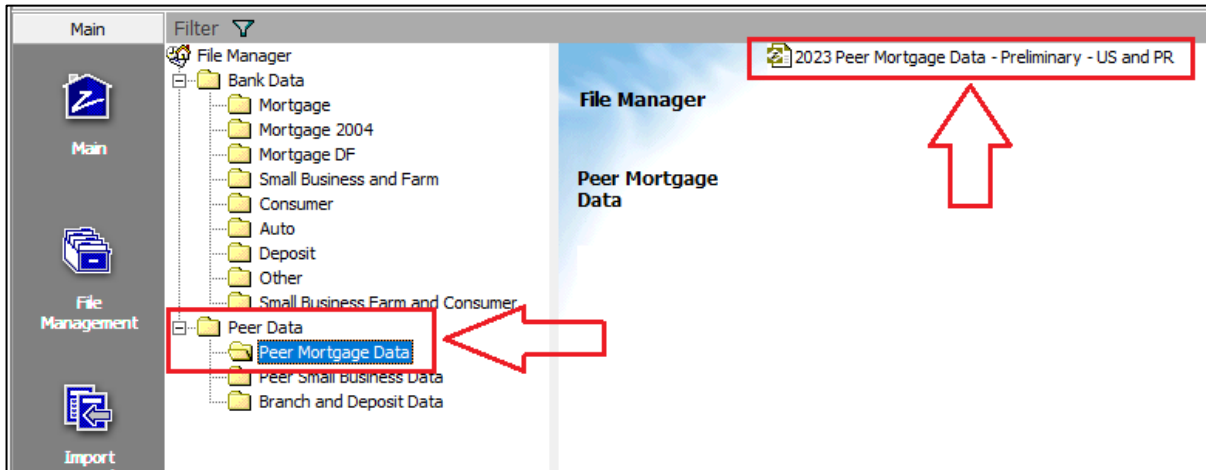
Recommended approximately 2.5 gigabytes (GB) for client/server and workstation installations (space consumed after installation approximately 2GB).

1.6 Approximate install time

Approximately two to three (2-3) minutes for client/server and workstation installations.

1.7 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 **2023 Peer Mortgage Data - Preliminary – 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 2023 Peer Mortgage Data installer.

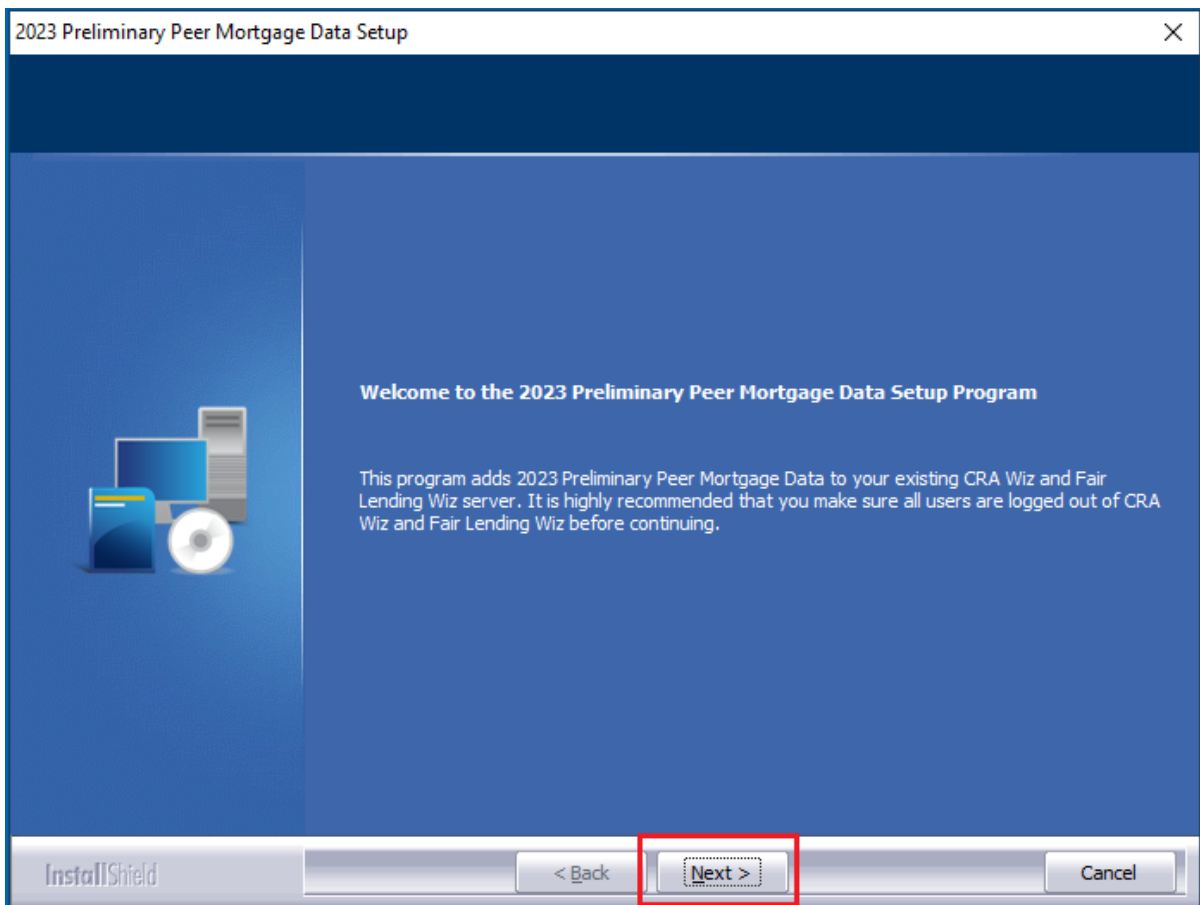
2 Installation Instructions

To install **2023 Peer Mortgage Data – Preliminary**, 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 **2023PeerMortgageDataPreliminary** 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:



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:

2023 Preliminary 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:

sa

Password:

InstallShield

< Back Next > Cancel

To configure SQL Server options, follow these steps:

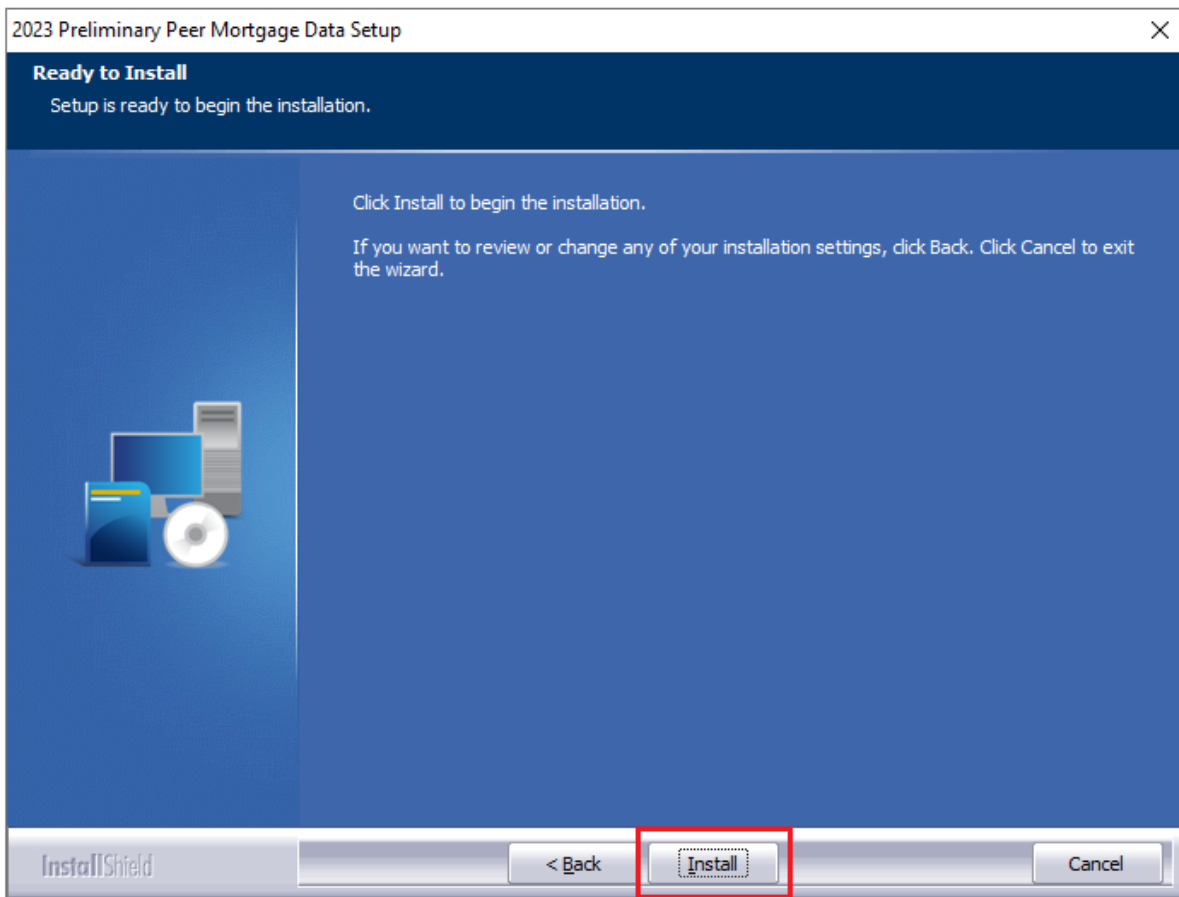
1. Do one of the following:
 - In the **Database server that you are installing to** field, enter the **SQL Server name and instance** to which you are installing the data.

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.

2.3 Ready to Install Screen

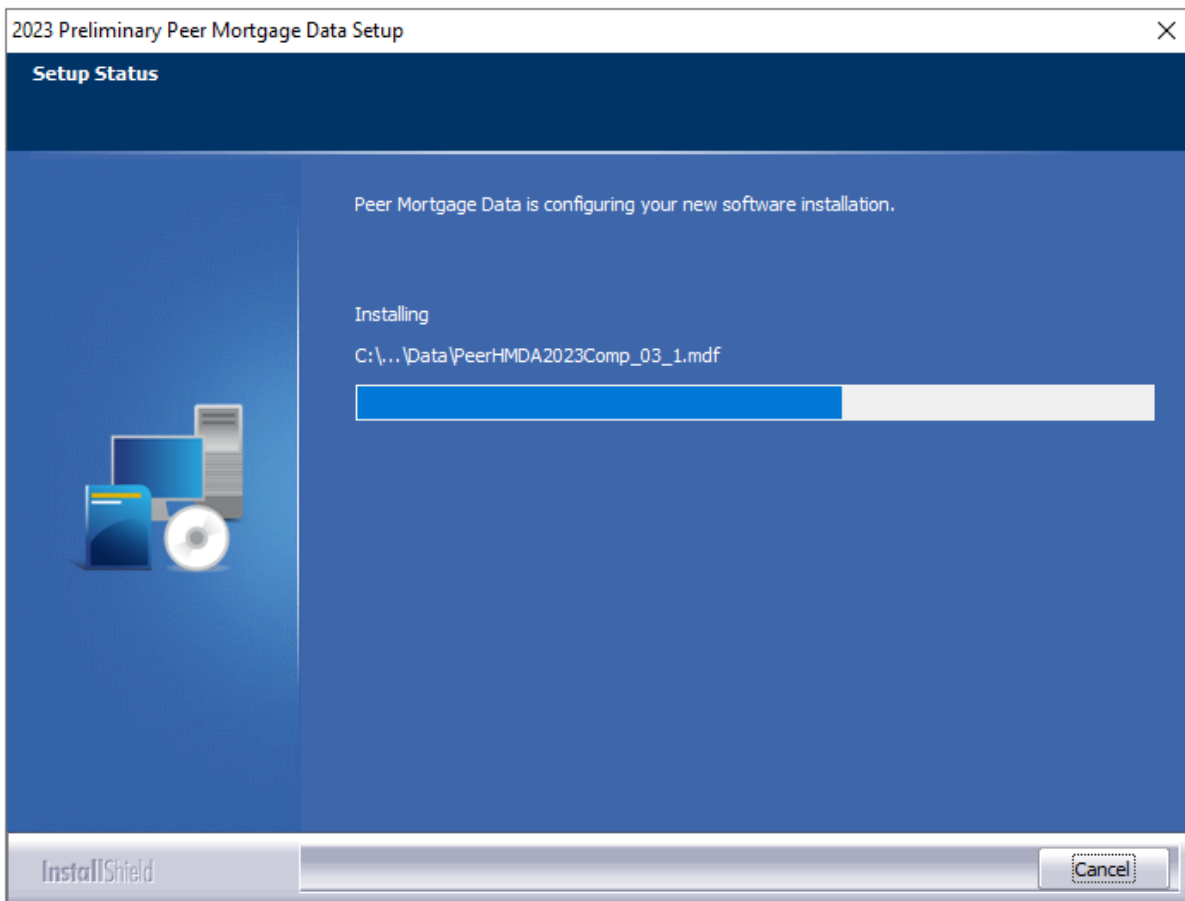
To begin installing the data sets, click the **Install** button:



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

2.4 Setup Status Screen

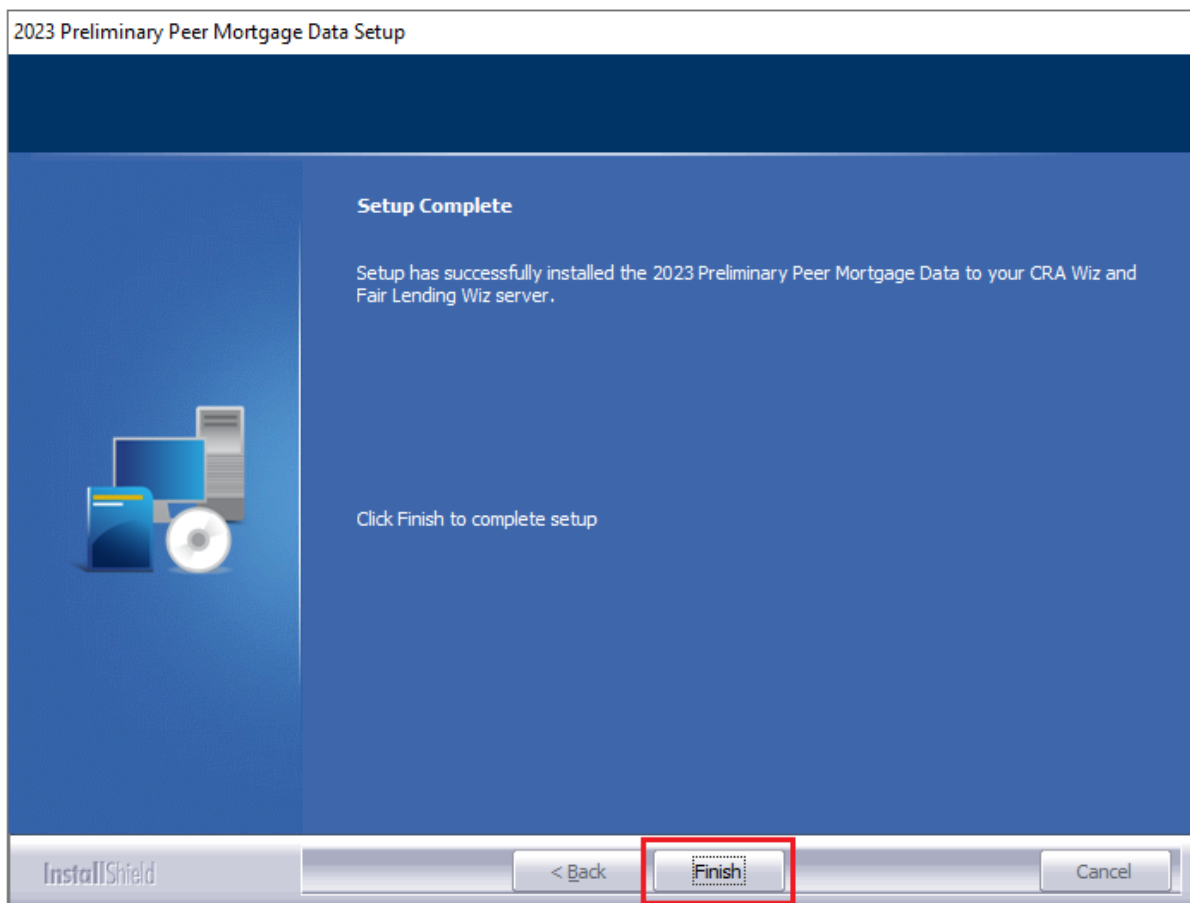
The **Setup Status** screen displays a progress bar that reports the progress of the installation:



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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