



Wiz Basic Portal: Importing Loan Data

August 2009

About This Document

This document is intended to provide instructions on how to import loan data from a loan origination software application such as ARTA Lending into the Wiz Basic website for HMDA.

This publication was written for ComplianceOne and Wiz Basic HMDA.

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Importing Loan Data into Wiz Basic Portal

Import Wizard Overview

Use the Import Wizard to import data files from your loan origination system (ARTA Lending, for example) into Wiz Basic Portal. After you have imported your data file into Wiz Basic Portal, you can edit, geocode, and analyze the data in your file. The Import Wizard divides the importing process into four easy-to-understand steps that ensure your data file is brought into Wiz Basic Portal properly.

Before you attempt to import a data file into Wiz Basic Portal, you should gather the following information about your file:

- Do you know where the data file you want to import is located? Is it on the same computer you use to access Wiz Basic Portal, or does the file reside on a network file server or shared folder?
- What is the action year of the loans in your file?
- What type of file do you want to import? Is it plain text, .DAT, or other type?
- What type of loan information is contained in your data file? Is it mortgage or small business?
- Is the information in your data file delimited or not? In other words, does your data file use commas, semi-colons, tab stops, or another method to separate columns of data?
- Does your data file contain a header row? In other words, does the first row of data contain column names, with actual loan data starting on row 2, or does the data begin in row 1?
- Does your data file use single- or double-quote text qualifiers?
- A list of the standard and user-defined columns (fields) used in your file (for example, Loan Type, Purpose, Action, etc.). Having this list at hand will aid you when you have to map the columns in your data file to the columns used by Wiz Basic Portal.

If you do not know or are unsure of any of the above items, please contact PCi Technical Support at 1-800-261-3111.

Import Wizard - Step 1

The first step of importing is to locate the data file you want to import, and then upload it to Wiz Basic Portal.

To complete Step 1 of the Import Wizard, do the following:

1. Accept the default selection of **Mortgage** in the **File Type** drop-down list.
2. If you are creating a new import format, select the **New** option button.
or
If you want to use a previously saved import format, select the **Saved** option button and then select a saved import format from the drop-down list.
3. At the end of the **Source File Selection** field, click **Browse...**

4. On the **Choose File** dialog box, locate and select the data file you want to import and click **Open**. The path and file name of the data file you selected is displayed.
5. Click **Next** to upload the data file to the Wiz Basic Portal.
6. Continue with the Import Wizard - Step 2.

Import Wizard - Step 2

During step 2 of the importing process, you specify the characteristics of your data file so that the software can handle the file properly. Characteristics of a data file include file type, delimiter type, text qualifiers, and other attributes.

To complete Step 2 of the Import Wizard, do the following:

1. In the Format section, select the option that describes your data file:
 - **Delimited** - Data format that uses characters such as commas or colons to separate values.
 - **Fixed length** - Data format in which all the records in the file are the same size. The file system knows how much space has been allocated for each record, and that all of the space is to be available for data.
2. If the first row of your data file contains heading/column information, check the **First row has column names** checkbox.
3. From the **Row Delimiter** drop-down list, select the formatting used to separate information (columns of data) in your data file. Delimiter options include the following:
 - Comma (,)
 - Semicolon (;)
 - Pipe (|)
 - Space ()
 - Tab
 - Other
4. From the **Text Qualifier** drop-down list, select one of the following qualifiers:
 - Single (') quotes
 - Double (") quotes.
 - None
5. Click **Next**. The software displays Import Wizard - Step - 3.

Import Wizard - Step 3

During Step 3 of the import process, you provide a name for your imported file and specify whether this is a new import or an update to a data file that is already in the Wiz Basic Portal system.

To complete Step 3 of the Import Wizard, do the following:

1. From the **Import Type** drop-down list, select one of the following options:
 - **New** - Select if this is the first time you are importing this data file into Wiz Basic Portal.
 - **Update** - Select if you are importing a data file for the purpose of updating the information in a data file that is already in Wiz Basic Portal.
2. In the **File Name** text field, enter a name for your imported data file.
3. If you do not want the software to geocode your data file, check the **Do not automatically geocode my file** checkbox.
4. From the **Activity Year** drop-down menu, select the activity year for the loan applications in your data file.
5. Click **Next**. The software displays Import Wizard - Step 4.

To complete Step 4 of the import process, refer to the following sections:

- Auto-Mapping Columns
- Manually Mapping Columns
- Saving Import Format
- Finishing Import

Auto-Mapping Columns

To automatically map the columns in your data file to Wiz Basic Portal standard columns, do the following:

- Click **Auto-Map**. If your data file contains column types that match the set of standard column types in Wiz Basic Portal, the software will automatically map the columns in your data file to the columns in Wiz Basic Portal. If the software is unable to map columns automatically (because the source and target field names do not match), you can manually map the columns. Refer to the next section.

Manually Mapping Columns

To manually map the columns in your data file to Wiz Basic Portal standard columns, do the following:

1. Click the **Source Column** field located next to the target column you want to map. The software enables the Source drop-down menu for that column.

Note

The target column is the standard column contained in Wiz Basic Portal. The source column is the column in your data file.

2. From the **Source** drop-down list for the selected column, choose the column from your data file that best matches the target column on the left. Repeat as necessary for all unmapped columns.

Tip

To clear your selections from the Source drop-down menus, click **Clear Map**.

Saving Import Format

To save all of your import settings from this page and the previous pages as a reusable import format, do the following:

1. Check the **Save Format** checkbox.
2. In the **Format Name** field, enter a name for your import format.

Tip

To overwrite a previously saved import format with updated settings, select the saved format from the drop-down list and click **Save Format**.

Finishing Import

To finish the importing process, do the following:

- Click **Finish**. The software displays a message indicating that your imported file will be displayed in the **Data File** list.

For further information on how to accomplish this task PCI may be contacted @ 1-800-261-3111