

What's New in version 3.21

April 2025

ProAdmin version 3.21 introduces the user-defined error and warning detailed calculations, the ability to import data from Excel, the #MAXLS operator to access the IRS 415(b) maximum lump sum benefit, enhanced comparison detail, and deep erase. Full details plus many other new features are described below.

Interface

Enhanced Comparisons

• Differences are now color coded to make them easier to see. You will see this when comparing entries as well as when viewing the change history for an entry.

Comparison key: [-] Ret - Traditional Plan Retirement - Limited [+] Ret - Traditional Plan Retirement - Unlimited Benefit Definitions - Pension [-] Name: Traditional Plan Retirement - Limited [-] Date last modified: April 16, 2024 12:48 (reflects changes to referenced objects) [-] Date created: August 3, 2004 10:45 [+] Name: Traditional Plan Retirement - Unlimited [+] Date last modified: August 9, 2023 15:01 (reflects changes to referenced objects) [+] Date created: October 5, 2006 14:55

• When comparing more than 2 items, you can now specify the order of all entries. Previously you could only specify which entry was listed first. (The initial order is still set by the sort order of the library you're comparing entries in.)

Deep Erase. Deleting entries in bulk is now more efficient and intuitive. Simply select an entry and then click Erase > Deep Erase. This not only lets you delete the selected entry but also gives you the option to delete its inputs too, as long as they aren't referenced elsewhere in your ProAdmin client.

	Erase Erase Deep Erase	
Deep Erase		? ×
Erase this entry and selected inputs (2 e	entries selected):	



Tags and Notes for library entries are now easier to edit and access – either for selected entries in the library or within an individual entry. This means you don't have to stop what you're doing to jot down a note or tag. This also means Notes can now be edited (or deleted) for multiple entries at once. If you haven't used tags and notes, tags are a great way to group like entries together and notes are a great place to keep supplemental information or reminders.

Name:	Accrued Benefit						۵
Cor	ntingency <u>i</u> nitiatin	g benefits					
Co	ontingency:	Retirement	~				

Plan Definitions

Round Monthly Benefit Up for was improved to allow for rounding the benefit up to cent, half dollar, or dollar. In addition, you can use a coded field to set more complex group rounding.

Miscellaneous Parameters	? >
Payments	
Benefit payment frequency:	monthly
Annuity payment timing:	beginning of period \checkmark
Round monthly benefit up for:	member & beneficiary ~ Params
Rounding unit:	half dollar 🗸

Certain Period End Date. On the Miscellaneous Parameters dialog box, you can now define the certain period end date as the last guaranteed payment date. Otherwise, ProAdmin shows the first of the month following the certain period. For example, the end date for a ten (10) year certain period that began on 01/01/2020 defaults to 01/01/2030, but when this new parameter is checked, the date displayed is 12/01/2029.

Payments		
Benefit payment frequency:	monthly	
Annuity payment timing:	beginning of period \checkmark	
Round monthly benefit up for:	member & beneficiary \checkmark Parar	ms
Rounding unit:	cent 🗸	

Consider #DODEC for MRD calculation. On the Miscellaneous Parameters dialog box, you can now reflect the termination date in the calculation of minimum required distribution date standard output item.

Use decrement date in calculation of minimum required distribution date

Calculated Dates now have the option to vary the Service Definition Set by a coded database field.

Description	Normal Retirament Data			
Description	Normal Retrement Date			
Field to conta	in calculated date:			
DateOfNorm	alRetire ~	New		
Using Ser	vice Definition Set:			
<by code<="" th=""><th>d database field></th><th>~ 2</th><th>Params</th><th></th></by>	d database field>	~ 2	Params	
	algulated data			
	alculated date			
◯ Standard o				

Retroactive Payments can now reflect different interest assumptions for annuities and lump sum payments.

○ None			
○ Constant			
O Constant from database field		v	
O Based on Interest Rate Table	1 yr t-bill monthly	- C	Param
Use prior month interest	Freeze at	✓	

Benefit Formula Components

#MAXLS x is a new Benefit Formula Operator that calculates the U.S. IRC Section 415(b) maximum lump sum benefit based on the plan actuarial equivalence and U.S. regulatory data assumptions. The right argument represents the deferral age, or 0 if immediate.

Life Insurance. A new component will calculate an insurance factor. The available parameters are almost identical to those for annuity factors and they include a full set of decreasing insurance options.

Replace Save As N	ew Erase View			
News	Description			
Name:	Description:		P.	
DecLife	Decreasing Life Insu	irance	0	
Component type:	Insurance factor	~		
Select a topic to edi	t:			
*Mortality Intere	st & COLAs			
Payment / Calcu	lation Period			
Joint Life Insurar	nce			
Age / Interpolat	ion			
(* = incomplete)				
(* = incomplete)				11
(* = incomplete) Decreases annually				14
(* = incomplete) Decreases annually Initial face amount:	• Constant:) Field:		110
(* = incomplete) Decreases annually Initial face amount: Annual decrease:	Constant: Constant:	◯ Field: ◯ Field:		11
(* = incomplete) Decreases annually Initial face amount: Annual decrease: Minimum face amount:	Constant: Constant: Constant: Constant:	○ Field: ○ Field: ○ Field: ○ Field:		11

Late Retirement components have two new options for defining actuarial equivalence: the Plan Actuarial Equivalence can be referenced directly or assumptions by coded field can be defined.

Reflect interest only Actuarial Equivalence assumptions: <by coded="" database="" field=""> Reflect interest only Actuarial Equivalence by Coded Database Field Actuarial Equivalence by Coded Database Field Coded database field: Location Specify the Actuarial Equivalence by Coded Database Field for each code: Database Code Actuarial Equivalence by Coded Database Field for each code: Database Code Actuarial Equivalence by Coded Database Field for each code: Database Code Actuarial Equivalence of the field of the field for each code: Database Code Actuarial Equivalence of the field for each code: Database Code Actuarial Equivalence Hartford 1971 GAM @ 7% Dallas 1971 GAM @ 7% Dallas</by>	Reflect interest only Actuarial Equivalence assumptions: <by coded="" database="" field=""> Reflect interest only Actuarial Equivalence by Coded Database Field ? X Coded database field: Location Specify the Actuarial Equivalence by Coded Database Field for each code: Database Code Hartford 1971 GAM @ 7% Milford 417(e)(3) with GATT Phase In Greenwch 417(e)(3) with GATT Phase In Denver 1971 GAM @ 7% Dallas 1971 GAM @ 7% Dallas</by>	Params	~ 17		Equivalence assumptions:
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Denver 1971 GAM @ 7% Dallas 1971 GAM @ 7%	Denver 1971 GAM @ 7% Dallas 1971 GAM @ 7%			417(e)(3) with GATT Phase In	Greenwch
Dallas 1971 GAM @ 7%	Dallas 1971 GAM @ 7%			1971 GAM @ 7%	Denver
				1971 GAM @ 7%	Dallas
	OK Cancel				

Age difference reframed from "husband/wife" to "member/beneficiary".

Male Members 3 Female Members -3	Number of years memb	ber is older than beneficiary:
Female Members -3	Male Members	3
	Female Members	-3

XML Output Code. You can now override the XML output code for the benefit details output of an Accrual Definition or Late Retirement component.

Replace Save As New E	⊡ ase View	
Name:	Description:	
CBBenefit		
Component type:	Accrual - Cash balance	
Benefit [sum of (basis x rate	es) with interest]	
Accrual Rates:	1	
Basis Formula:	#SALARY	
Accrued Benefit:	Field: MRHistory; Round balance; Round accruals	
Interest Crediting		
Structure:	0.06; Monthly	
Adjustments:	<none></none>	
Active Rate Change:	<u>n/a</u>	
Projection:	Interest until commencement at 0.05	
Accruals:	Limit when accruals occur; Use the accrual basis formula directly	
	2/2	

Projection Assumptions

Salary to Project now allows you to define rounding for fields adjusted for measurement periods more frequent than annual.

Salary to Project			?	×
Projected salaries are based on the:				
O Rolling 12-month average of e	empirical salaries			
O Most recent or prior year meas	surement period val	ue (see below)		
O Most recent full measurement	period value (if no	full period, see belo	ow)	
• Field: EeAddtlDataAmt1		~		
Adjust value for measureme	nt periods more fre	quent than annual		
Apply rounding rule:	Amount:	0.01		
	Disastian	Nearest		

Override by Service Definition Set allows you to have differing projection assumptions for the Service Definition Set. For example, you want vesting service to be based on an assumed hours but, all other service definition sets should be based on elapsed time. annual.



Calculation Results

User Defined Errors and Warnings is a new section on the menu tree.



This section lists all the errors and warnings that were evaluated for the calculation, and when an entry is selected, a new exhibit showing how the error or warning was developed displays. For example:

User-Define Errors/Warr	ed Errors a nings: Ear	nd Warnings n Checking 🖉
PersonID: 1	11-11-11	11
EARNHISTBASE	Criteria met?	
11,461.90	Yes	
Error/Warning Condition cal Message displ	applies t culation: aved:	c: Census data (EARNHISTBASE > 100) This person may be in excess of the 401(a)17 limits calculation needs to be reviewed.

Benefit Formula Component Types. When viewing the benefit formula components, the menu tree now shows the accrual type (i. e. Accrual – Final Average).

🖨 💼 Benefit Formula Components	
CBConvFact (Annuity Factor)	
CBOpenAB (Database Field)	
- Fr (Table Benefit Component (varies by coded field))	
FinalAvgPav (Accrual - Basis Only)	
LateRetirementBenefit (Late Retirement)	
MA_Example (Accrual - Basis Only)	
PIAValues (Accrual - Basis Only)	
PriorCalcdBene (Database Field (expression))	
💾 RetBen (Accrual - Final Average)	
Vest (Table Benefit Component)	



Table Type is now included in the header when viewing benefit component, accrual basis component and conversion tables.

Benefit Formula Components Name: ERF ∥ Type: Table Benefit Component (age)

PersonID: XXXXXX599

Date	Member Age	Table Member Age	Benefit Component
12/31/1982	28y 8m	29y 0m	0.000000
12/31/1983	29y 8m	30y 0m	0.000000
12/21/100/	20v 8m	21v 0m	0 000000

Data Linkages

XML Database Linkage. A Validate option is now available for XML Database Linkages. Validation tests the field mappings and will allow you to validate an XML record. Unlike a calculation where only the data needed for the calculation is retrieved, this validation returns all mapped fields from the record.

	, ĉ	ទា	2	AA.		
Replace Save As	New Frase	View	XMI Schema	Validate		
<u>Replace</u> Save As		View		validate		
and Detabase Timbers	Mah Ratimatan 0					
XML Database Linkage:	Web Estimator 2					
Input XML file name:	C:\Users\higgipat	<pre>>OneDrive -</pre>	PERSEUS MANAGEME	NT GROUP INC\Doc	uments\proadmir	_files
Key Fields		_				
ney ricido						
Decrement Date	2014-09-30					
Commencement Date	2014-10-01					
Calculation Type	1					
	String					
Decrement Type						
Decrement Type	2					

Extracting XML Schema. When you successfully export a schema (for an XML Database Linkage or XML Output Linkage), you are now given the opportunity to open the newly created file or open the directory that contains the newly created XSD file.



Filter. The filter for XML Database Linkage Data Field Links can now accept and filter on attributes within the tag, not just the tags within the container.

NML Data Lin	κ <i>?</i>	X
Field:	OverRideSalary1	
Container:	intelliPenWProAdmin/Inputs/Assumptions/UserOverrides	€
Tag (value):	Assumption	€
	Translate character input	
Filton	@name="Salary1"	
riitei.		
riitei.	Apply to: O Container O Tag	

Validate Excel. A validate for Excel option is now available as a choice under the Database Linkage Validate. This tests the integrity of the file and data validity. For example, it will flag mixed data types within a column.

<u>}</u> eplace	民 Save As <u>N</u> ew	ाँ <u>E</u> rase	ھ <u>V</u> iew	Va <u>l</u> idate			
itabase	Link Person ID	Data Field Link	ks	Validate Validate	e e connection	Alt+Shift+L, V Alt+Shift+L, O	
Descr	ription:			Validate	e Excel	Alt+Shift+L, E	
New	one Excel spread	lsheet					
Datal	hase.					_	
Dutui	Juse.					Browse	
						Diomsein	
ADO	Connection String	g(*):					
Provi	der=Microsoft.A	CE.OLEDB.12.0;	Data Source=	ParticipantData.	xlsx; Extended	Encrypt	
Prop	erties="Excel 12.0) Xml; HDR=YE	S";				
* A bl	lank connection s	tring will defau	ult to the Micro	soft Jet Engine.			
ADO	Database User ID):					
400	Database Passwo	ord:					
	Database rasswo						
ADO							
ADU							

Output Definitions

Populate description. When adding Input Pass Thru items for Desktop (Access or XML) Application types, you can now populate the description from the Data Dictionary field's description.column.

	? ×
Address City	Populate
AddCity	
AddCity	~
Output: Ocodes Olabels	
<u>O</u> K	Cancel
	Address City AddCity AddCity Output: Ocodes Olabels

Basis Only Components detailed results can now be written out as part of the Output Definition.

Benefit Formula Component:	PIA ~
O Accrual Basis Component:	~
Return salaries reflected in highest	final average
Return all considered salaries	
Return benefit formula componen	t details
<proadminbfcdetails></proadminbfcdetails>	
<proadminbfc></proadminbfc>	
<name>PIA<</name>	/Name>
<type>Accr</type>	ual definition - basis only
<code>4<th>ode></th></code>	ode>
<valueatde< th=""><th>c>35124</th></valueatde<>	c>35124
<details></details>	
<d-< th=""><th>ate>1988-12-31</th></d-<>	ate>1988-12-31
<m< th=""><th>emberAge>25.25</th></m<>	emberAge>25.25
<b< th=""><th>FCResult>0</th></b<>	FCResult>0
<details></details>	
<d.< th=""><th>ate>1989-12-31</th></d.<>	ate>1989-12-31
<m-< th=""><th>emberAge>26.25</th></m-<>	emberAge>26.25
<b< th=""><th>FCResult>5544</th></b<>	FCResult>5544

XML Output Linkage

Retroactive payment date. When identifying the Key Fields for an XML Output Linkage, you can now select the XML tag that will contain the retroactive payment date.

_ Decrement Level Detail		
Decrement Date:	DecrementDate	K
- Benefit Level Detail		
Code:	BenefitLevelCode	K
Description:	BenefitLevelDescription	K
Normal form code:	BeneiftLevelNormalFormCode	K
- Commencement Level Detail		
Commencement Date:	CommencementDate	K
Error indicator:		K
Retroactive payment date:	RetroDate	K

Certain period end date. When adding a Plan Dependent field which Varies by Payment Form, you can now identify the XML tag that will contain the certain period end date.

\Lambda Plan De	pendent	? ×
Field des	ription: Payment Forms	ID: 114
Varies by:	Payment Form 🗸	
Contain	er:	
<cal< td=""><td>:ulation Output/Outputs/ParticipantLevel/DecrementLevel/CommencementLevel/Payme</td><td></td></cal<>	:ulation Output/Outputs/ParticipantLevel/DecrementLevel/CommencementLevel/Payme	
Tag:	PaymentFormPartAmt	ĸ
	Numeric	
🔽 Deferr	ed commencement date	
Tag	PaymentFormDefACD	ĸ
🔽 Certai	n period end date	
Tag	PaymentFormCertEndDate	ĸ
🛃 Tempo	orary stop date	
Tag	PaymentFormTempAnnStopDate	K

Server Tools

Calculator Testing is now available on the menu tree under the Server Tools section. The Tester will now also remember new Test Scripts and their path as they are entered.



Fulfillment Tool

Delete empty tables, rows, or columns. The Fulfillment tool can now delete tables, rows and/or columns when there are no values. To delete rows, columns or an entire table in the generated or previewed Word Document, use the following case-sensitive keywords as the Default Value when mapping a field in the Fulfillment Tool:

- Del. Row If a row contains the string 'Del. Row', that row of the table will be deleted.
- Del. Col If a column contains the string 'Del. Col', that column of the table will be deleted.
- Del. Tbl If the string 'Del. Tbl' is found anywhere in the table, the table will be deleted.

After the mail merge has occurred (while generating or previewing packages), if at least one Fulfillment Field uses 'Del. Tbl', 'Del. Col', or 'Del. Row' as its Default Value, every table in each document in the package is searched for these case-sensitive keywords, and, if found, the appropriate action occurs. If all the rows or columns of a table are deleted (using 'Del. Row' or 'Del. Col'), then that table will be deleted.

Data Load Tool

ProAdmin version 3.21 includes a major re-design and significant enhancements to the Data Load Tool.

Interface. The interface of the Data Load has been re-organized and streamlined for a much more intuitive and transparent operation.

The main dialog has been streamlined to display all of the processing parameters on the bottom of the dialog, while the top of the dialog varies depending on whether you choose a ProVal database or an Excel Workbook as the source file. If a ProVal database, a Client directory button is present, whereas if an Excel Workbook, a Worksheet multi-choice field allows you to select the worksheet containing the data you want to load.

	Et û	<u>ا</u> آھ	<i>#</i> A	ě	
Replace Sa	ve As New Erase	View	Validate	Load data	
Name: XLS	- TST04 (earnhistbase	.) (mdb)			
▶ Source File					
ABCSAL2	000.xlsx				Browse
Default Pe	erson ID Field: SSN		````	Worksheet: Sheet1	1\$
Coloction	Everyonic (black me		-).		
Selection	Expression (blank mea	ans all source record	5):		
2211 >	00				
Database L	inkage				
<create [<="" td=""><td>)atabase Linkage></td><td></td><td></td><td></td><td></td></create>)atabase Linkage>				
Name of	new Database Linkage	e: ABC Salaried Plan			
Access Da	tabase:				
ABCSalar	y.accdb				Browse
Target Field	IS				
* 4	ProAdmin Field	<pre>/ ProAdmin Type</pre>	Source Field	Source Type	Map Fields.
*	BeneSex	coded	SpSex	char	Edit Field
	DateOfBirth	date	BirthDate	date	Add/Omit.
	DateOfHire	date	HireDate	date	Preview Field
	DateOffern	uate	ternidate	uale	
* Inco	mplete A = A	dd to Data Dictiona	ry		
Procesing P	arameters				
If the Acc	ess database file alrea	dy exists. append to	database		
If an error	occurs during the Dat	ta Load, abort and	eset database		
	eady exists for an indi	vidual, abort the Da	ita Load		
If data alr		hase lignore datab	ace relationships	(e.g. Drimany & Ecraign	(Kours)
If data alr	an explanation the state	upace Uppore datab'	ase relationships	(e.g., Primary & Foreign	(Keys)
If data alr If creating	or replacing the data	abase, ignore databa			
If data alr If creating Quit loadi	or replacing the data	errors			



Excel. You can now load data from an existing Excel Worksheet into an Access database (*.mdb or *.accdb) for use with ProAdmin. You can either load new data into the Access database, or you have the option of updating the existing data in the Access database with the new values found in an Excel Worksheet.

Database Linkage. If you are creating a new Database Linkage, you now specify the name of the new Access Database (*.mdb or *.accdb) on the main dialog. Previously, you could only specify this name while loading data.

Codes/Labels reconciliation logic has been improved and now only the user can perform this reconciliation. Previously, various automatic reconciliations were performed which could change the user's original mappings.

Skip zero's. You now have the option to skip the load of zero (0) values for any numeric field.

Value				
ProVal Field:	SalaryLY	~	Reconcile Coded Labels	

Existing data. There are now a total of five (5) options for what to do if data already exists for an individual. The two options for replacing existing data are new with this release.

- Abort the Data Load
- Skip the person with the problem (no data written for that person)
- Skip the problem and continuing writing data for that person
- Replace existing data ignoring nulls, blanks, and missing values in the source data
- Replace existing data using nulls, blanks, and missing values in the source data

Validate. There's a new Validate button (at the top of the main dialog) which allows you to discover any problems before you try to load any data into the Access database.

Load Data. The Load data button only becomes available when you have filled in all the information on the main dialog and completed all the information needed on the Target Field dialogs. For example, typically, a user might forget to reconcile coded fields (e.g., matching the source's codes/labels to the ProAdmin field's codes/labels).

Track changes. There is a new option to track changes to the data in the Access database (only changes made by loading/modifying data using the Data Load Tool). If this option is selected, the table ztblTrackDataChanges is created and filled.

ProAdmin API

Administration Factors. The ProAdmin Application Programming Interface (API) has been expanded to allow you to use the assumptions found in an existing Administration Factor Library entry to calculate Annuity Factors, Conversion Factors, and Commutation Functions from within another application (e.g., Excel).

The new API function RUNADFACT is called to calculate Annuity Factors, Conversion Factors, and Commutation Functions. Additionally, GETRUNADFACTARGS is used to get the default arguments for a RUNADFACT call: available payment form names (if any), name of the normal payment form (if any), and a list of available commutation functions (if any).

For pricing information and details about how to install the API, please contact ProAdmin Support.



System

The full path of the folder for the ProAdmin client is now always reported when providing output. This was already the case for most output, but now has been extended to all output.

Sorting library entries with two clients open at once. Now if you have two clients open, sorting library entries in the first client won't affect the sorting in the second client.

Multiple ProAdmin sessions are now allowed for software licenses (maximum 5 sessions).

The name of any loaded/applied MOD files is now displayed in the System Info.

Changes Log

Be sure to read the changes log about updates to certain calculations that may change results. You can easily access the file by clicking on Help, Changes Log.

