

ProAdmin version 3.01 introduces dramatic **interface enhancements**, saving **Output Definitions to XML** and **Break in Service Definitions**. You'll find details about these and other enhancements below.

Interface

- ◆ ProAdmin's main window now sports a contemporary interface, making ProAdmin easier to learn and more efficient to use. You'll feel like you have more control, with a better grasp of the contents of a client and where you are in it.

The screenshot displays the ProAdmin software interface. The title bar reads "ProAdmin - ProAdmin Online Demo Plan Salary [C:\Documents and Settings\higgins\My Documents\proadmin_files\demo\...]". The menu bar includes "File", "Input", "Execute", "Tools", and "Help". Below the menu bar, there are navigation icons and a "Project: ProAdmin Online Coding" dropdown. The main window is divided into two panes. The left pane, titled "Shortcuts", contains a tree view with categories: "Database" (Data Dictionary (126), Database Linkage (1), XML Database Linkage (2), Selection Expressions (0)), "Benefit Calculations" (Eligibility Definitions (13), Service Definition Sets (11), Service Definitions (10), Break-in-Service Definitions (0), Event Definitions (1), Date Adjustments (8), Numeric Rounding (3), Salary Definition Sets (3), Plan Definitions (2), Census Specifications (2), Output Definitions (9), Final Benefit Calculations (1), Projection Assumptions (1), Estimated Benefit Calculations (6)), "Reference Tables" (Mortality Rates (21), Interest Rate Tables (2), Actuarial Equivalence (3), Conversion Tables (3), Custom Regulatory Tables (0)), and "Other Calculations" (Dates/Age/Service (0), Batch Estimates (1)). The right pane, titled "Estimate Calculation Library", has a toolbar with "New", "Edit", "Rename", "Copy", "Erase", "Hide", "Unhide...", "Compare", and "View". Below the toolbar is a table with columns "Name" and "Modified".

Name	Modified
* Test #4	3/11/2010 11:58 AM
* Smith	3/12/2010 11:33 AM
Jones - xml	5/20/2010 9:52 AM
Jones - xml output from server	6/11/2010 11:02 AM
Jones - xml output from standalone	6/11/2010 11:02 AM
* Jones	6/14/2010 9:57 AM

At the bottom of the window, there is a status bar showing "6 items", "0 items selected", "0 items hidden", and "Version 2.04, 6/11/2010".

Some of the highlights:

- o A shortcuts pane (on the left) contains all of the libraries from the Input, Execute, and Tools menus. Libraries are organized by task, revealing how the pieces fit together. The number of entries is displayed in parentheses, letting you grasp what's in a client at a glance.

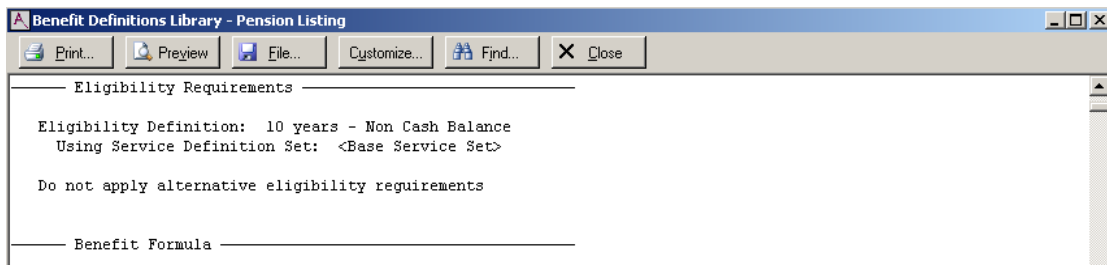


Back and Forward buttons let you quickly return to the last command you visited just like in a browser. This might be handy, for example, if you start in Estimated Benefit Calculations and then go to Projection Assumptions to make some revisions. To return to Estimated Benefit Calculations, simply click the Back button.

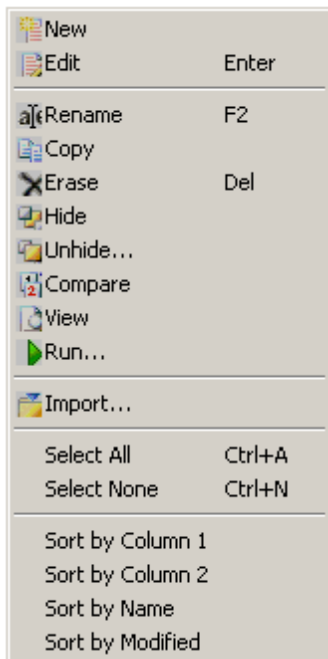
- o An entries pane (on the right) displays the contents of the selected library. Buttons above the entries let you perform the familiar operations of New, Edit, Rename, Copy, Erase, etc.



A new View button lets you display the selected entry's definition (as if you Edited it and clicked View). If you select more than one entry to View, a list of objects will also be included. Extending this idea, you can produce a list of all entries in a library by selecting all the entries and clicking View.



The operations mentioned above can also be performed by right-clicking.



- o A status bar (at the bottom) reports statistics about the listed entries, among other things.

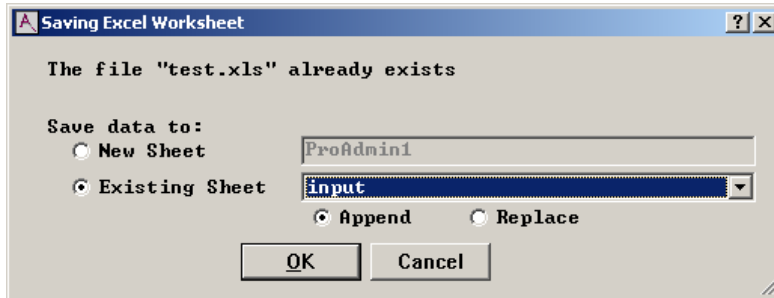


- o No retraining required. ProAdmin's menus have not changed, so you won't *have* to change the way you use ProAdmin (although you'll probably *want* to!).

- ◆ Inverted libraries (such as Selection Expressions) now allow entries to be sorted by date and allow multiple entries to be deleted at once.
- ◆ To reflect the increased international usage of ProAdmin, a "U.S." prefix has been added to the PIA calculation tool.

Output

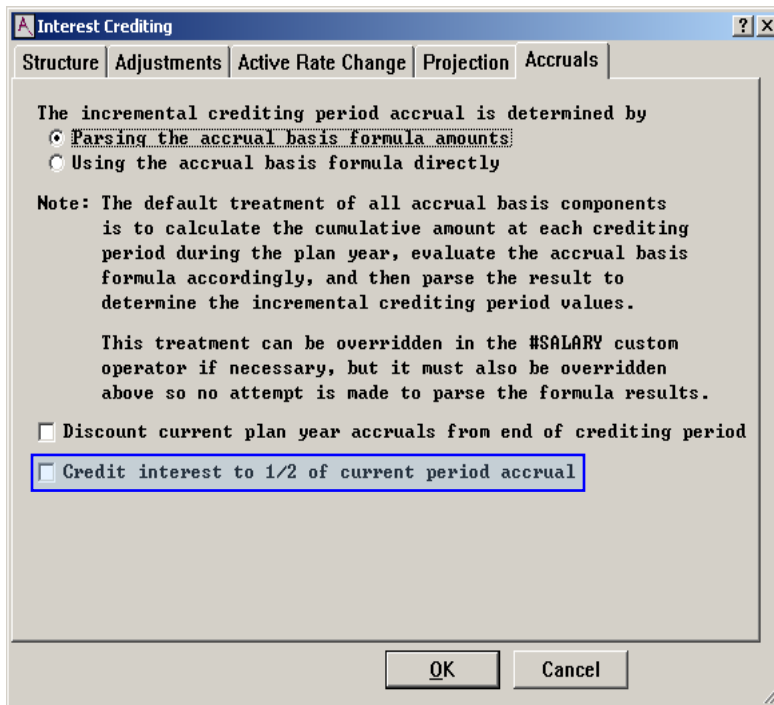
- ◆ There is a new Output Definitions Application Type: Desktop (XML). This allows you to save the Output Definition sample life reports directly to an XML type record. For more, see [Output Definitions to XML](#) on page 6.
- ◆ When saving output to Excel, you can now specify the sheet to save to.



- ◆ Dashes from SSNs have been removed when saving output to .csv/.xls.

Benefit Formula Components

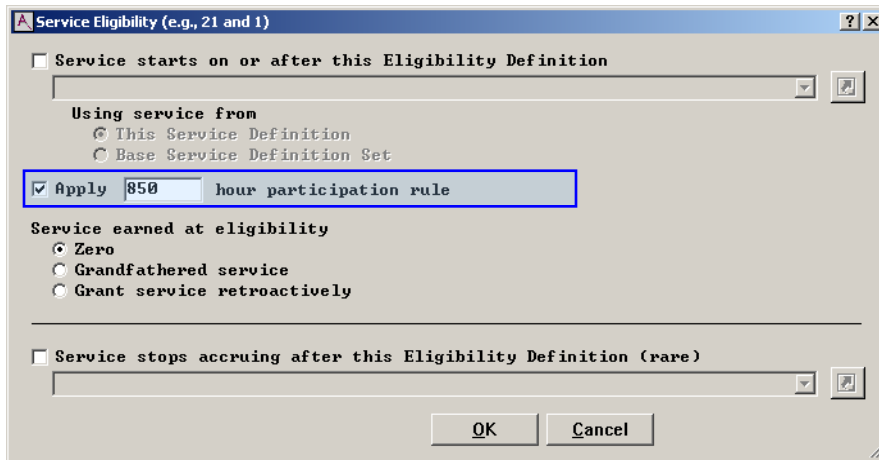
- ◆ There is a new Cash Balance interest crediting option that allows you to apply interest to one half (1/2) of the current period accrual. This new option applies to all crediting frequencies except daily.



- ◆ Cash Balance components now limit the list of partial period crediting options to only those periods that are smaller than the plan's default crediting period.

Service Definitions


- ◆ A user defined hours field has been added to the Date of Hire participation rule. Previously, the requirement was a 1000 hours which will now be the default.



Tables

- ◆ Users can now specify custom regulatory limits. You can reference a .txt file, define it as either a salary limit or a wage base table, and specify the desired rounding. These tables can then be referenced in the following types of custom operators: #SALARY, #FAS, #CVCP and #SSWB.
- ◆ The "RP-2000+ Combined Mortality Table (dynamic)" has been added to the default mortality rates library.

System

- ◆ "Back door" buttons  let you directly edit Plan Definitions, Census Specifications, Projection Assumptions and Output Definitions from within an Estimated Benefit Calculation. Look for these "back door" buttons within all runs on the Execute menu – Estimates, Finals and Date/Age/Service Calculations.
- ◆ A client folder can now be opened as read-only when it is in use by another user.
- ◆ ProAdmin now explicitly recognizes Office 2007 files with .xlsx (Excel), .docx (Word), and .accdb (Access) file extensions. For example, if you have Excel 2007 installed, you can save results to .xlsx files; and if you have Access 2007 installed, you can save exhibits to .accdb files. If no extension is specified when saving (e.g., "myfile" instead of "myfile.xls" or "myfile.xlsx"), ProAdmin will default to using the classic extensions .xls, .doc, and .mdb to avoid potential issues sharing files with users that don't have Office 2007.
- ◆ ProAdmin has now been tested under Windows 7 and Windows Server 2008.
- ◆ Application file names now consistently follow the pattern "proadmin.xxx", making the .ini file parameters "Initial Workspace=" and "ADF=" optional (and no longer appear in the default .ini file that ships with ProAdmin). PROVALW.EXE has been renamed PROADMIN.EXE and PROVALW.INI has been renamed PROADMIN.INI. This may necessitate changes to existing network installation shortcuts and/or WinTech License Server installations. You may need to:
 - rename your existing PROVALW.INI files to PROADMIN.INI.
 - update references to filenames in your existing ProAdmin shortcuts.
 - update references to filenames in your existing PROADMIN.INI and WinTechService.License.INI for your existing License Server(s).

- ◆ The version of PVAPI.DLL that ships with ProAdmin 3.01 is not backward compatible with the one that ships with older versions of ProAdmin. For ProAdmin 3.01, you will need to register its own copy of PVAPI.DLL. We expect that this version should remain forward compatible unless we specify otherwise.
- ◆ ProAdmin's help has been upgraded to a format which is explicitly supported by Windows Vista, avoiding the need to separately download and install the Windows Help program (WinHlp32.exe).
- ◆ Regional and Language Options (decimal symbol, digit grouping symbol, and list separator) are now respected when importing reference tables.

Changes Log

- ◆ Be sure to read the changes log (see the "Changes Log (ProAdmin).doc" file in the ProAdmin directory) about updates to certain calculations that may change results.

New Member of the WinTech Team

Jim Moore recently joined the WinTech team. He is an experienced benefit analyst and, among other responsibilities, will be working on ProAdmin enhancements. Be sure to say hello to him if you reach him at ProAdmin support.

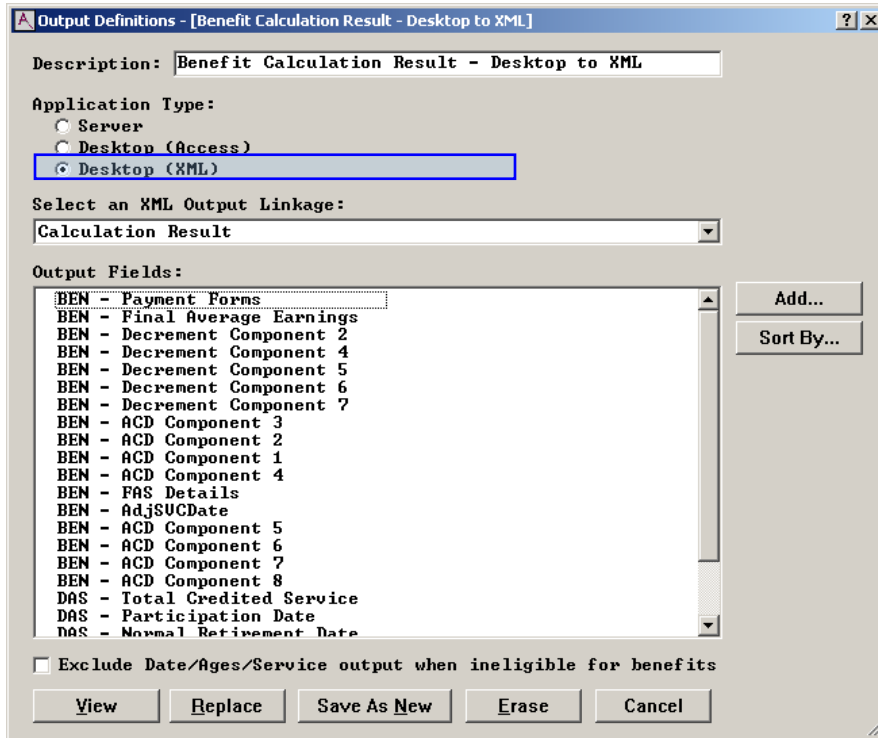


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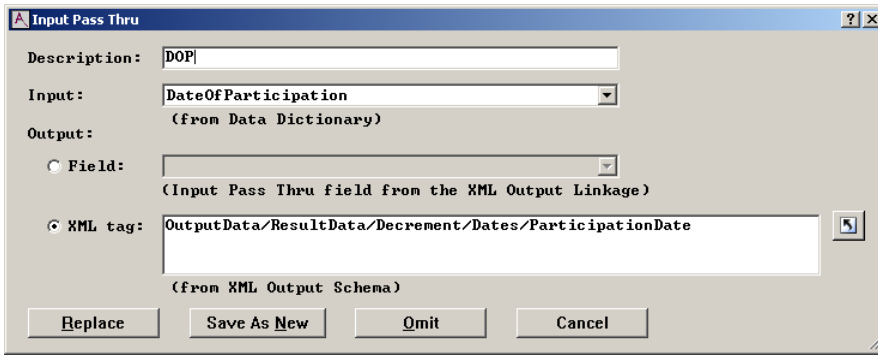
Output Definitions to XML

ProAdmin's Output Definitions have been enhanced for a new Application Type: Desktop (XML). This type allows the user to create an Output Definition that, when saved from the Output Definition sample life reports, will create an XML record.

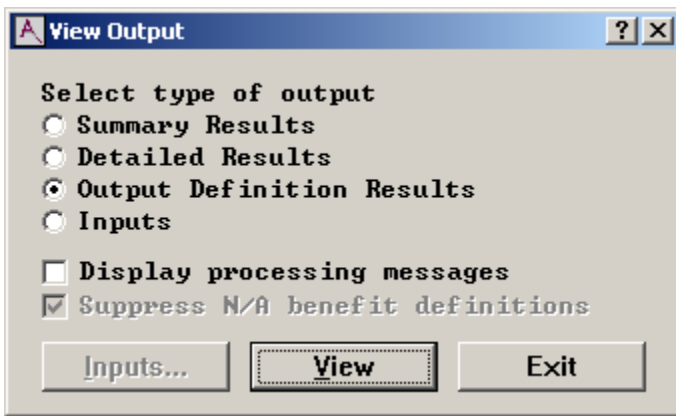


The Desktop (XML) type is similar to the Server type: it requires you to select an XML Output Linkage, the Benefit Detail and Date/Ages/Service output items are mapped to XML Output Fields, and it uses the Standard items associated with the XML Output Linkage. The only difference is with regard to Input Pass Thru items: they use the Data Dictionary fields, not an XML input record, as the source.

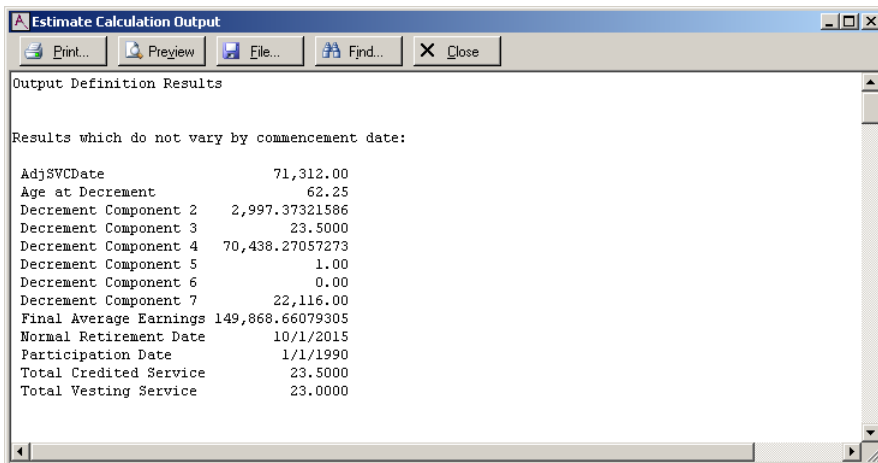
When you click on the **Add...** button and select **Input Pass Thru...** the dialog box below will display. Select the Data Dictionary element to be used as the Input and set the Output XML tag. The output can be to one of the Input Pass Thru fields already defined with the XML Output Linkage or to an XML tag that is in the schema associated with the XML Output Linkage. If you select **Field:**, the multi-choice field will display all of the field descriptions set up on the Input Pass Thru tab of the selected XML Output Linkage. If you select **XML tag:**, you can either type in the tag or use the look up button to the right of the box to select the tag from the schema associated with the selected XML Output Linkage.

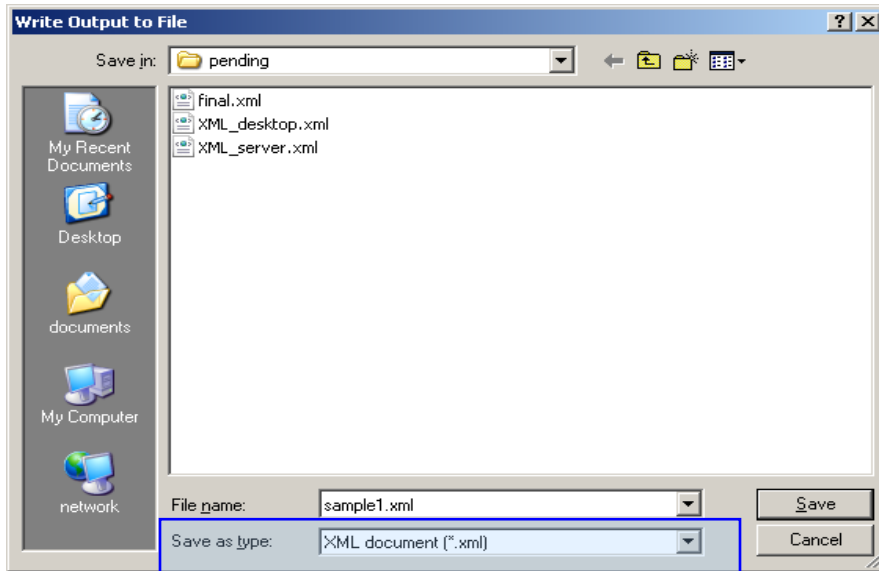


If an Output Definition is referenced in an Estimated or Final Benefit Calculation in ProAdmin Desktop, you can review the Output Definition results by clicking the **View...** button from the main dialog, then selecting **Output Definition Results**, and finally clicking that dialog's **View** button.



If you are satisfied with the results and want to save them, click the **File...** button on the top of the viewing pane. In addition to the file formats previously available (Excel, Text, and Access), you will now have the option of saving the results in an XML file format.





Note that the XML document choice is not available for the Server or Desktop (Access) Output Definition types. It is only available for Desktop (XML) types.

Break-in-Service Definitions

ProAdmin has been enhanced to allow for the setting of Break-in-Service parameters. This new feature allows the user to create a Break-in-Service Definition that can be applied in the calculation of service to determine if service is forfeited. The new Break-in-Service library is accessed from the Service Definition Sets shortcuts or by selecting Input | Service Definitions | Break-in-Service Definitions. The dialog box allows you to set the specific parameters that define a break, when to disregard pre-break service, and to stop breaks when vested.

A break is defined as when a plan member earns either zero (0) service or less than a certain fraction of service during a plan or calendar year. To set this you select one of the two radio buttons. If you select the Less than radio button you are required to specify the decimal years of service. You will also select the Service Definition Set that calculates the breaks.

Break-in-Service Definition - [New Rules]

Name:

Definition of a break

A one-year break-in-service occurs when you earn

Zero service

Less than years of service

During a Plan Year

Calendar Year

Using Service Definition Set:

Disregard service

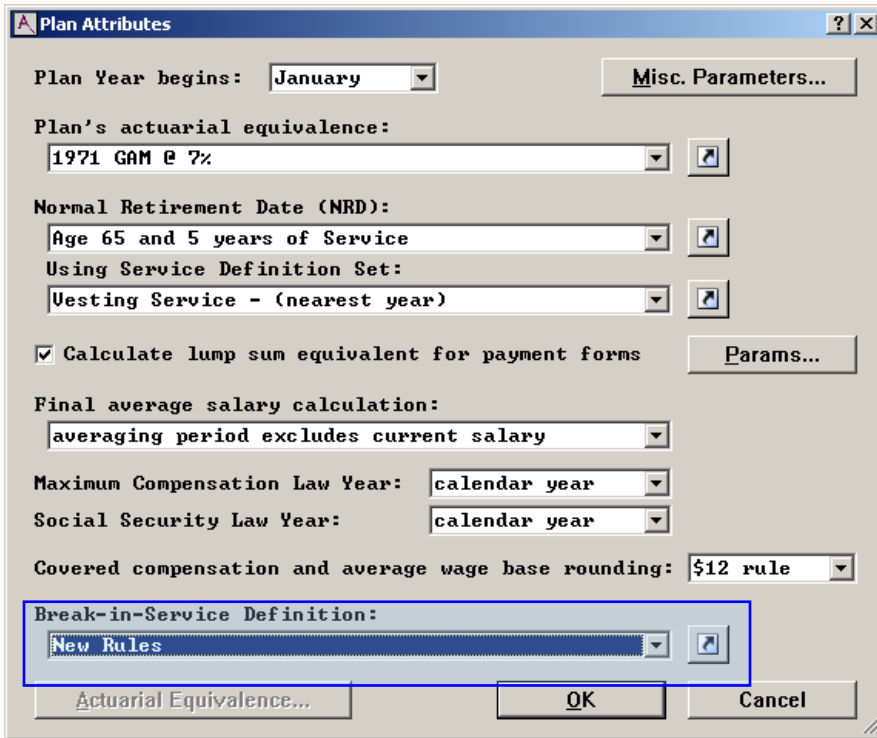
Disregard pre-break service when the break is or more consecutive years

Stop determining breaks at vesting

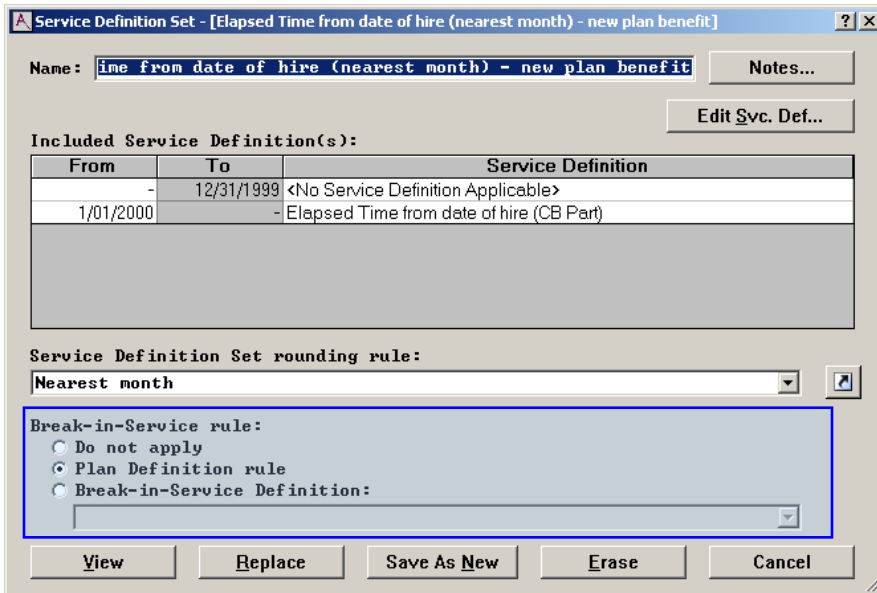
Determine if vested using this Eligibility Definition:

and this Service Definition Set:

Once the Break-in-Service parameters are set you can assign your rule as a global plan rule through the plan attributes.



You will then associate either the plan rule or a specific rule to the Service Definition Set.



When you run a calculation where you have applied the Break-in-Service rules the detailed sample life reports will have a new Break-in-Service exhibit. This exhibit will show you the service earned, whether a Break in Service has occurred, if they met the vesting condition, and how many consecutive breaks have occurred.

Date	Pass	Total Service	MP Service	Breaks in Service	Vesting Service	Vested	Adj Brks in Service	Consecutive Breaks
12/31/1972	1	0.000000	0.000000	No	0.000000	No	No	0
12/31/1973	1	0.000000	0.000000	No	0.000000	No	No	0
12/31/1974	1	0.000000	0.000000	No	0.000000	No	No	0
12/31/1975	1	0.000000	0.000000	No	0.000000	No	No	0
12/31/1976	1	0.000000	0.000000	No	0.000000	No	No	0
12/31/1977	1	0.000000	0.000000	No	0.000000	No	No	0
12/31/1978	1	0.000000	0.000000	No	0.000000	No	No	0
12/31/1979	1	0.000000	0.000000	No	0.000000	No	No	0
12/31/1980	1	0.000000	0.000000	No	0.000000	No	No	0
12/31/1981	1	0.000000	0.000000	No	0.000000	No	No	0
12/31/1982	1	0.000000	0.000000	No	0.000000	No	No	0
12/31/1983	1	0.000000	0.000000	No	0.000000	No	No	0
12/31/1984	1	0.000000	0.000000	No	0.000000	No	No	0
12/31/1985	1	0.000000	0.000000	No	0.000000	No	No	0
12/31/1986	1	0.000000	0.000000	No	0.000000	No	No	0
12/31/1987	1	0.000000	0.000000	No	0.000000	No	No	0
12/31/1988	1	0.000000	0.000000	No	0.000000	No	No	0
12/31/1989	1	0.463210	0.463210	Yes	0.000000	No	Yes	1
12/31/1990	1	1.463210	1.000000	No	0.000000	No	No	0
12/31/1991	1	2.463210	1.000000	No	0.000000	No	No	0
12/31/1992	1	3.463210	1.000000	No	0.000000	No	No	0
12/31/1993	1	4.374401	0.911191	Yes	0.000000	No	Yes	1
12/31/1994	1	4.374401	0.000000	Yes	0.000000	No	Yes	2
12/31/1995	1	4.374401	0.000000	Yes	0.000000	No	Yes	3D
12/31/1996	1	4.374401	0.000000	Yes	0.000000	No	Yes	4
12/31/1997	1	4.374401	0.000000	Yes	0.000000	No	Yes	5
12/31/1998	1	4.374401	0.000000	Yes	0.000000	No	Yes	6
12/31/1999	1	4.374401	0.000000	Yes	0.000000	No	Yes	7