



RPAG Tech Enhancements

RPAG 2024 Tech and System Enhancements

July 11, 2024

- Red error message
 - Loading error messages are now hidden

May 23, 2024

- BD Advisor IQ
 - Drill through function within the Advisors by AUM chart now has scroll bars for viewing
- Osaic
 - Larkspur has been removed for Osaic users and replaced with ERISApedia

May 9, 2024

- UBS
 - New subcategories for each of the four quarters have been added under any calendar year

April 25, 2024

- Report
 - Calendar Year Performance
 - The new Calendar Year Performance has been added to the FIR, Fund lookup, Fund Research, and the Scorecard dropdown for all users.

April 11, 2024

- Benchmarks
 - Money market and stable value funds now have benchmarks
- Advisor iQ
 - Added historical reporting option to the AUM tile under Advisor iQ for all users

March 27, 2024

- RFP Express
 - Frequency details have been added to the “Fee Details” section of the report, consistent with the output of the provider analysis report

March 14, 2024

- Advisor Reports
 - ‘Recordkeeper’ and ‘TPA’ contacts have been added to the Plan Data report
- RPAG Login
 - “Login Failed” error message text changed to “Login Failed. Please try again. Contact support@rpag.com”
- RFPX
 - Plan Demographics will now be locked and unable be edited after quote requests have been submitted

February 29, 2024

- RPAG Services
 - Larkspur added to the RPAG services list on the company admin page
 - PlanFees Premier Bundle text changed to PlanFees
- Managed Portfolio Allocation
 - “The Inception Date” field under Portfolio Performance and Benchmark Performance section of the Portfolio Allocation tool is now displayed in XX.XX% format

January 18, 2024

- Meeting Minutes
 - Added the ability to reorder the attendees on the Meeting Minutes output
- Strategy Equivalent
 - Added Strategy Equivalents to the Plan Dashboard-Summary FIR module

January 4, 2024

- Red Error Message
 - Red error messages sometimes appear when a page loads slowly, or when something on the page fails to load; we have hidden these errors wherever possible so you should notice less error messages when navigating the site
 - For instances where errors may still appear during normal site usage (that do not affect site usability), a text change has been implemented which modifies the language to be less alarming
- RPAG Fund Clean Up
 - A sitewide query has been executed to remove many inactive funds from the system
- FIR
 - Previously, only PlanFees Prism reports were available to be included in the *PlanFees Prism* report module (all reports showed up in the dropdown, but users encountered generation errors when selecting other report types)
 - This module has been renamed with the more inclusive title *PlanFees Report*
 - Users will now be able to select both *PlanFees Prism* reports and *Prism365 Advisor Fee & Services Benchmarking* reports that they have previously generated using the PlanFees tool for inclusion within their FIRs