

Release Notes

Axiom Financial Institutions Suite
Version 2020.4

The Axiom logo consists of the word "AXIOM" in a bold, white, sans-serif font. It is enclosed within a rectangular frame made of two parallel lines, one light blue and one light purple. The background of the entire page is a dark blue gradient with a pattern of overlapping, semi-transparent circles in various shades of blue and purple.

AXIOM

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About the Release Notes

Syntellis is pleased to announce the 2020.4 release of Axiom Financial Institutions Suite. Each product release provides new features, enhancements, and configuration options to meet your needs. Many of these features and enhancements are a direct result of your feedback and suggestions.

The purpose of these release notes is to provide you with the following:

- High-level descriptions of new features
- Information to know before upgrading
- Steps for preparing for and scheduling your upgrade
- List of fixed issues

New features in 2020.4

Syntellis Performance Solutions, previously Kaufman Hall Software, provides innovative enterprise performance management software, data and analytics solutions for financial institutions. Our powerful budgeting and planning, profitability, and analytics solutions help institutions elevate organizational performance and transform vision into reality.

With hundreds of leading banks, credit unions, and farm credit associations using our Axiom solutions to manage nearly \$1 trillion in assets combined with top satisfaction rankings from BPM Partners for the past 8 years, our proven industry expertise helps financial institutions acquire insights, accelerate decisions and advance their business plans.

► Gain efficiency and boost profitability

Innovative financial institution solutions

Improve financial and organizational performance with our integrated financial planning and profitability solutions. Our solutions help analyze historical results, model future business scenarios, mitigate risk, and optimize decisions that result in operational efficiencies, improved profitability, better strategic investments, and strong competitive positions.

Data-driven decision making

We equip organizational leaders with the tools needed to accurately quantify the financial impact of every decision they face. We believe data-driven analysis and disciplined thinking, supported by a unified product platform, increased transparency and the fundamental principles of corporate finance, drive near-term success and long-term sustainability.

Industry expertise

Built from the ground up by finance professionals with extensive experience in finance and financial institutions, our solutions incorporate best practices to optimize the ROI for your institution. From the sales process through implementation and support, our clients agree that we truly understand the unique challenges faced by today's financial institutions.

► Enhanced software ROI

Fully unified platform

Version 2020.4 provides easy-to-upgrade, integrated solutions (Axiom Planning, FTP, Organizational Profitability), Axiom RPPS for 2020.4 and Customer Profitability for 2021.1. The unified platform (including Axiom RPPS) streamlines planning and analysis processes, with improved ability to measure and analyze margin for actionable profitability insights.

Easy to use / faster adoption

A modern, web-based, and intuitive user interface and user experience improve user engagement. A new guided training approach provides faster time to value for new users.

Cloud-based

Migrating from previously hosted Axiom on premise now use a cloud version of our software that provides unmatched security. Requiring a minimal IT footprint, the system is scalable through geo-distributed Microsoft Azure data centers, monitored 24/7 by Syntellis for peak performance and anomalies, and architected for high availability.

► Axiom Planning

Deliver timely and accurate information to support financial performance while adapting to change.

Shorten budget cycle and streamline reporting

- Distributed data input and report access; permissions-based workflows, intuitive web-based interface.
- Automated planning and reporting process.
- Integrated solutions and source systems for consolidated reporting.
- Flexible, powerful reporting through web-based report builder, ad hoc report writer, robust library of standardized reports, and Axiom Intelligence for dashboards/visualization.

Stay nimble to mitigate risk

- Quickly react to changing business conditions with periodic forecasting.
- Mitigate risk through scenario analysis.
- Configure reporting for stakeholder groups to drive informed, data-driven decisions.

Improve budgeting accountability and accuracy

- Reduce errors, imports and duplicate data entry with a single system for budget inputs.
- Drive user adoption and accountability with a user-friendly, web-based interface.
- Better transparency with drill capabilities to instrument and transaction levels.
- Improve accuracy of net interest margin planning with Cash Flow Forecaster.

► Axiom Funds Transfer Pricing and Profitability

Improve accuracy

Employ a transparent, matched-term funds transfer pricing (FTP) approach where users can alter pricing assumptions, transfer pricing at the individual instrument/record level based on origination date, term, options, and expected cash flows. Measure profitability at an account level, including FTP, costs, fees, capital, and provision; aggregate to any dimension (customer/member, product, officer, branch, etc.) within the organization for consistent profitability.

Gain a complete view of risk-adjusted profit contribution

With a highly configurable costing engine, matched-term FTP, inclusion of direct costs and income, provision, and capital rules, measure and analyze full profit contribution and risk-adjusted return on capital (RAROC). Calculate RAROC, applying a matrix-based risk assessment approach to ascribe economic capital at an account level.

Deliver the right information, faster

Gain visibility to which customers, products, branches, and other segments drive the most value for your institution to inform pricing, marketing campaigns, customer interactions, channel strategies, and more. Configure and automate reports and dashboards based on end user needs, delivering comprehensive profitability results and other metrics to the right people to drive business decisions.

► Axiom Relationship Profitability and Pricing System

Accurately price, analyze, and manage portfolios to optimize profitability and best server customers.

Build and manage complex relationships

Understand each client's sphere of influence by building and managing complex relationships. Provide relationship managers and other frontline staff with the ability to quickly see the true scope of a relationship, informing real-time decisions to appropriately serve your best customers.

Understand and leverage profitability analytics

Accurately calculate and analyze account, customer, and relationship profitability to identify which relationships bring the most value. Understand and analyze the value of every relationship (including all types of accounts) to maximize profitability, expanding profitable relationships—limiting the risk of underserving your best customers—and managing relationships that are not profitable.

Accurately price new business

Price new business based on the empirical profitability of the relationship, including the current contribution and forecasted revenue, to ensure that profitability hurdle rates (for example, Risk Adjusted Return on Capital or RAROC) are met. Compare pricing scenarios to best balance the customer's needs with expected profitability, providing increased value to both the relationship and the institution.

Preparing and scheduling upgrades

Summary of the upgrade process:

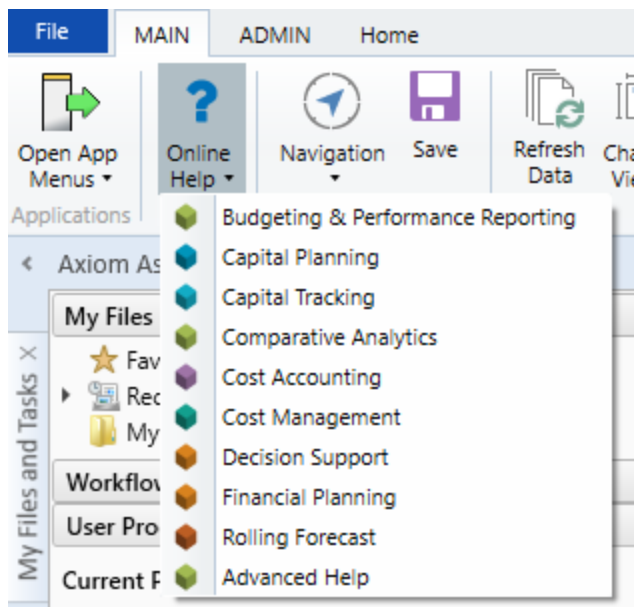
1. **Review product release notes** – Review this document to familiarize yourself with the new features and functionality.
2. **Schedule an installation date** – Submit a request to your organization's Axiom Master System User (MSU) to contact support by creating a [support ticket](#) to schedule an installation date and time with at least three days of advance notice. The request should include the following information:
 - Desired Axiom platform version.
 - Desired Axiom for Financial Institutions product and version.
 - Indicate whether to first refresh the Axiom test sandbox with a copy of the production instance of Axiom and apply update(s) to it. If so, provide the soonest that Syntellis can do this.
 - Propose an approximate two-hour downtime window when Syntellis can apply update(s) to the production instance of Axiom during regular business hours, Monday through Friday 7 AM to 7 PM Central (except holidays recognized by Syntellis).
3. **Complete manual configuration updates** – After installing the upgrade, review any manual setup steps needed to enable features for this version.

Getting help and training

Syntellis provides world-class resources at your fingertips directly within the Axiom system. Axiom Help provides topics, knowledge base articles, documents, webinar/training announcements, and videos to guide you through managing your system. To access these resources, do any of the following:

- **Windows and Excel Clients** – From the Main or Admin ribbon tab, click **Online Help**, and then select the product. Axiom Help opens in a new browser window.

NOTE: The online help will only open for products you are licensed to use.



- **Form/Web pages** – Form/web-enabled features and products include contextual help directly within the user interface. This information provides a quick summary and/or instructions specifically related to the screen you are using. You can access this information by clicking the question mark in the upper right corner of the screen. To access the full Axiom Help system, click **Open Help** at the top of the contextual help dialog.



► Syntellis Central

Syntellis Central provides centralized self-service content and resources for the Axiom Financial Institutions Suite platform and suite of products. Using Syntellis Central, you can: Search help across all Axiom products Access tips, tricks, and best practices in our knowledge base Find training & certification

content including on-demand, video, webinars, labs, and instructor-led courses Submit a support issue, find suggested content, and manage any outstanding issues directly with us Review open Software Service project status and details