

Release Notes

Axiom Financial Institutions Suite
Version 2023.1

The Axiom logo consists of the word "AXIOM" in a bold, white, sans-serif font. It is enclosed within a thin, light blue rectangular border. The background of the logo area is a dark blue gradient with a pattern of overlapping circles in various shades of blue.

AXIOM

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Version: 2023.1

Updated: 2/28/2023

About the Release Notes

Syntellis is pleased to announce the 2023.1 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.

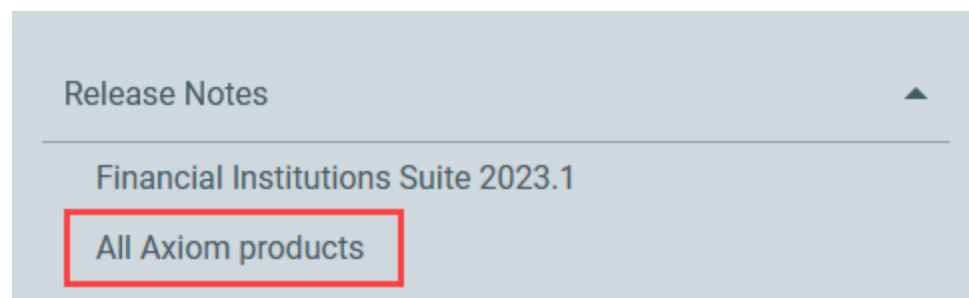
The purpose of these release notes is to provide you with the following:

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

TIP: Periodically, the release notes are updated when new information is available, including patch release fixes. To view the latest release notes, we encourage you to view them in the Axiom Financial Institutions Suite online help. On the help home page, click the Release Notes link at the top of the page.

► Accessing current and older release notes for Axiom Financial Institutions products

The online help for Axiom products includes a page with links to current and past release notes for the last several years. To access this page, [open the product online help](#), and at the top of the menu on the left side of the page, click **Release notes > All Axiom products**.



New features in 2023.1

Visual Insights

Axiom Visual Insights is a powerful addition to the Intelligence Center. You can now combine complex, disparate data sets to create dynamic visualizations.

Use Visual Insights to:

- Build data models that combine external data sources with native Axiom data.
- Add dimensions and measures to your models.
- Build visualizations from those models.

In this release, two new visualizations using VI are available in the Intelligence Center:

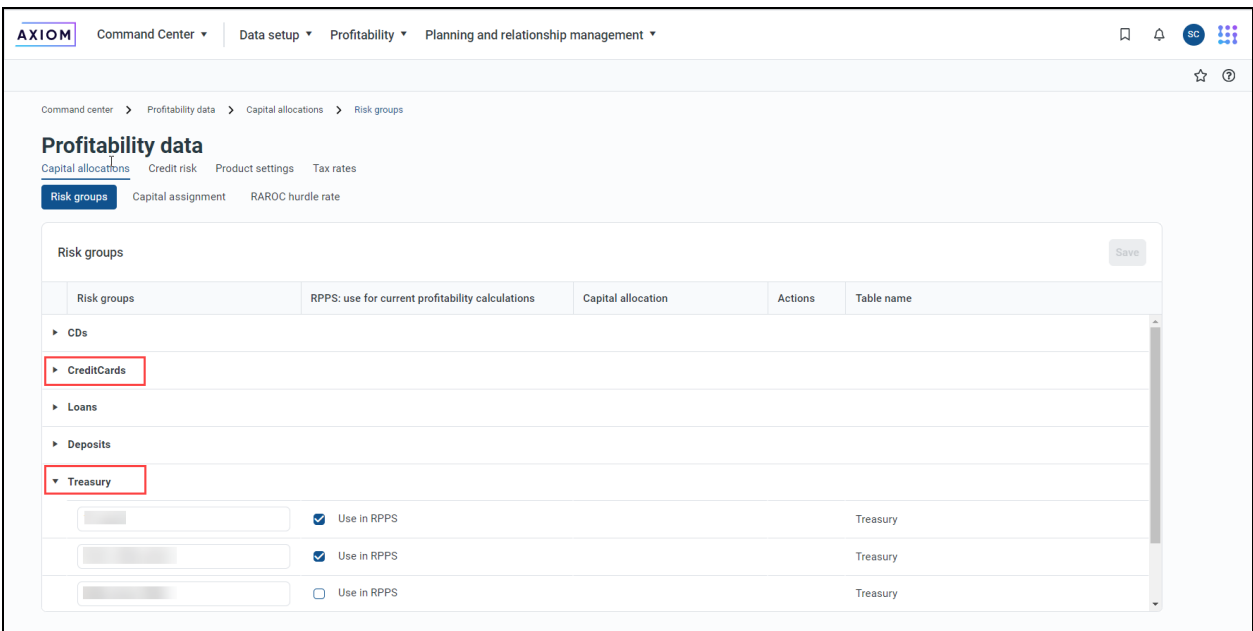
- Budget Variance Summary
- Loan Production

See the [Introduction to Visual Insights](#) course in Syntellis Academy to learn more about VI.

NOTE: A separate license to Visual Insights is required to view these reports and use its other features.

New products for profitability allocations

You can now use the new Credit Cards and Treasury products in Capital allocations for Capital assignment and risk groups.



For more information about profitability data and allocations see:

"About Profitability Data"

"Manage capital allocations"

"Manage credit risk"

What to know before upgrading

IMPORTANT: You must apply the Axiom 2022.4 upgrade before applying any 2023.1 Axiom product upgrades. Axiom upgrades are backward compatible so you can upgrade different products at different times, but you must upgrade to Axiom 2022.4 before the first product upgrade. Refer to the **Axiom 2022.4 Release Notes** for consideration before upgrading.

When upgrading to the 2023.1 version of Axiom Financial Institutions Suite, note the following:

- You can replace Syntellis reports. Any report that you created or saved under a different name remains unchanged. Revised reports are available in Document History.
- Any Syntellis report that was moved to a new location is automatically moved back to its original location.
- Syntellis product templates and calculation method libraries are replaced.
- Product task panes are replaced.
- Process definitions are not replaced.
- Driver files are replaced.
- Security roles and subsystems are reset to their configured settings. Your user security exceptions remain intact.
- Specific items that are configured as part of your company or organization's implementation such as imports, exports, driver files, and process management files, remain unchanged. Any required modifications to these areas are covered in the release notes.
- Shared tables might have any of the following changes:
 - Columns reordered
 - New columns added
 - Old columns removed (rare)

If you copy and paste into or from Axiom tables, please review the column order of those tables after upgrading to assess the impact to your internal processes.

Preparing and scheduling upgrades

Summary of the upgrade process:

1. **Review product release notes** – Review this document to become familiar with the new features and functionality.
2. **Schedule an installation date** – Submit a request to your organization's Axiom System Administrator 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:
 - Axiom platform version.
 - Whether to first refresh and apply updates to the Axiom test sandbox with a copy of the production instance of Axiom. If so, provide the earliest date that Syntellis can do this.
 - Propose an approximate two-hour downtime window when Syntellis can apply updates 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 to enable features for this version.

Getting help and training

Syntellis provides world-class resources 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 opens only for products you are licensed to use.

- **Contextual help** – Form/web-enabled features and products include contextual help directly within the user interface. This information provides a quick summary and instructions specifically related to the page you are using. You can access this information by clicking the question mark in the upper right corner of the page. 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 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 and 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 Support.
- Review open Software Service project status and details.

Issues fixed in 2023.1

The following table lists the resolutions for issues addressed in 2023.1, released on February 28, 2023:

Issue	Description
159367	Fixed a permissions error that prevented anyone using the Supervisor and Pricing requestor role from creating or editing a pricing request.
159768	Fixed an issue in RPPS that prevented users from saving a Deposit instrument to the ProspectiveAccount table.
160728	Fixed an issue in the FTP Assigned Rate Budget utility in which the company variable was not correctly processed due to a company filter in the expected field.
160863	Fixed an RPPS issue that occurred when users changed the status of the Active toggle for an existing instrument but the getScenarioExistingInstrumentsTable did not change.
160980	Fixed an issue in which users were unable to save changes to FTP rate rules because the Save button did not appear in the pop-up window.
161047	Fixed an issue that prevented users from selecting the Default Yield Curve option when assigning FTP base rate methods.
162001	Fixed an issue with ASOFDATE in the DQALog table that prevented users from adjusting the data for fiscal year end month.
162179	Fixed an issue in which users could not submit RPPS scenarios on the Pricing request page.
163526 Case number 00488260	Fixed an issue that prevented users from creating a payroll budget file group from an existing file group.
163558 Case number 00491427	Fixed an issue in which users could not import instrument data into the instrument profitability table.
164128 Case number 00491482	Fixed an issue in which imports to the FTPYieldCurve column in the FTPAssignment table failed.
164256	Fixed an issue where the Delete button did not appear on several pages.

Issue	Description
164258	Fixed an issue in Customer Account Profitability that occurred when users deleted a job function or responsibility from a survey, but the deletion did not occur.
164260	Fixed an issue in RPPS that occurred when users submitted a scenario, but the request was sent.
164543 Case number 00492600	Fixed an issue that occurred when saving to the database workbook FTP R3 failed because values were not set to refresh on open.
164701	Fixed an issue in which some columns in My Portfolio were incorrectly imported.
164753 Case number 00492421	Fixed an issue in which an unnecessary underscore symbol (_) was added to the instrument ID when importing credit cards.
164762 Case number 00490345	Fixed a credit card import problem that was caused by an incorrect data type in a destination column.
164945 Case number 00493498	Fixed an error in a script that switched a forecast file group to a budget file group.
165548 and 165633	Fixed a merge issue that caused KPIs to not work.