

Release Notes

Axiom Financial Institutions Suite
Version 2023.3

The Axiom logo consists of the word "AXIOM" in a bold, white, sans-serif font. It is enclosed within a rectangular frame that has a purple-to-blue gradient. The frame is composed of two horizontal lines and two vertical lines, with the top and bottom lines being slightly longer than the side lines.

AXIOM

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About the Release Notes

Syntellis is pleased to announce the 2023.3 release of Axiom Financial Institutions Suite. Each product release provides new features, enhancements, and configuration options. 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

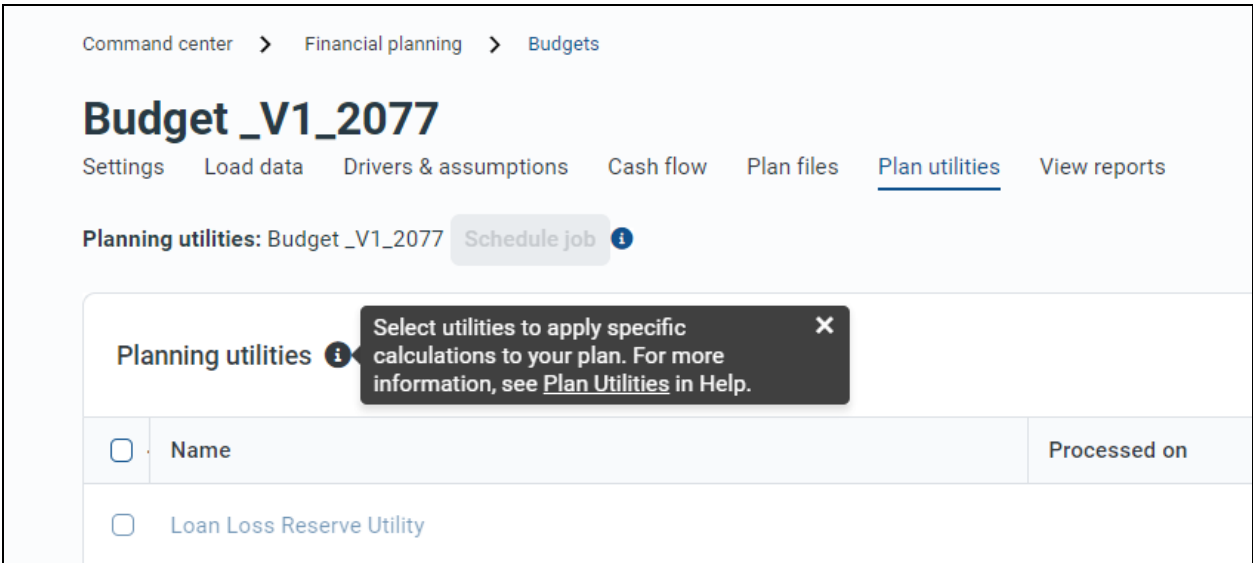
Prior to upgrading, review the **Axiom 2023.1 Release Notes** and the release notes for each product that is licensed by your organization.


New features in 2023.3

This release includes the following new features and enhancements:

Embedded tool tips in Budgeting

The Financial Institutions Suite introduces embedded tool tips in this release. Click the information icon to view a pop-up window with information about an item on the page:



In this example, the user clicked the information  icon to learn more about Plan utilities. The text describes the primary action for the utilities and contains a link to the Plan Utilities topic in the Help.

Daily instrument tables

To ensure that users have the most current data available when they create instruments for customers, daily instrument tables were created to replicate these monthly tables:

- Loans
- Deposits
- CDs
- CreditCards
- Treasury

A new import process (a copy of the instrument production import) was added to the scheduler. The daily instrument tables use a variable for Historical Retention data, which determines how long the daily data is stored before purging. The default value for Historical Retention days is 31.

New custom fields in tables

New custom fields were added to these tables.

Table Name	Field descriptions
ACCT	5 Integer
DEPT	5 Integer 2 Dates
CIF	10 String 2 Dates 2 Boolean 5 Integer
PROD	2 Boolean
GLTransaction	5 String
Instrument tables ¹	20 revenue numeric 20 expense numeric Origination YRMO
Deposit	Maturity YRMO (except Deposit instrument tables)
CD	
Loan	
Treasury ²	

¹New fields added to all types of Instrument tables: Production, Staging, and Daily.

²The number of custom fields for Treasury tables were reduced to match other instrument tables.

What to know before upgrading

IMPORTANT: You must apply the latest Axiom upgrade before applying any 2023.3 Axiom product upgrades. Axiom upgrades are backward compatible so you can upgrade different products at different times, but you must upgrade to Axiom 2023.2 before the first product upgrade. Refer to the **Axiom Release Notes** for consideration before upgrading.

When upgrading to the 2023.3 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 returned 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 or 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.
 - Axiom Financial Institutions Suite version.
 - Whether to first refresh and then 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 refresh and apply upgrades.
 - An approximate two-hour downtime window when Syntellis can apply updates to the production instance of Axiom. The downtime window should occur during regular business hours of Monday through Friday 7 AM to 7 PM Central Time (except for 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, release notes, webinar/training announcements, and videos to guide you through managing your system.

To access these resources, click **Online Help** from the **Main** or **Admin** tabs, and then select the product. Axiom Help opens in a new browser. The online help opens only for products you are licensed to use.

► Syntellis Central

- 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 outstanding issues directly with Support.
- Review open Software Service project status and details.

Issues fixed in 2023.3

The following table lists the resolutions for issues addressed in 2023.3, released on August 28, 2023:

Issue	Description
62836 RPPS summary not displaying correct Future 12 Month (FTM) File Transfer Pricing (FTP) Margin Case number: 0509384	Summary: The Future 12 Month margin displayed incorrect values. Resolution: Calculations now correctly reference FTM_FTPMargin values.
54633 Loan pricing item income and expense error Escalation Request: 170417 Case number: 00507211	Summary: Non-interest income and non-interest expense displayed identical values on loan pricing item. Resolution: Values now display correct calculations.
68251 RPPS Cash Flows on Alternate Payment Schedule (APS) loans not calculating Case number: 00519472	Summary: A flag to not calculate FTP on APS loans was incorrectly set. Resolution: Logic was updated so that FTP will now calculate as expected.