

Release Notes

Axiom Financial Institutions Suite
Version 2023.4

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. The top and bottom lines are a light blue color, while the left and right lines are a light purple color.

AXIOM

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About the Release Notes

Syntellis is pleased to announce the 2023.4 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

This document provides the list of changes to shared areas of the Axiom Healthcare Suite products, which includes:

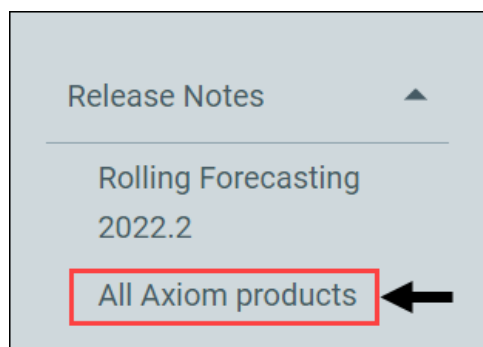
- Suite-wide feature additions and changes
- Security changes
- Key platform changes

Each Axiom Healthcare Suite product has their own separate release notes that provide additional details about features and fixes that are specific to that product.

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

► Accessing current and older release notes for Axiom Healthcare products

The online help for Axiom Healthcare 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**.



What's new in version 2023.4

Welcome to Version 2023.4 of Axiom Financial Institutions Suite!

This release of Axiom Financial Institutions Suite includes the following new features and enhancements:

► Profitability Report Mart enhancements

Added the following fields to the CustProf and ProdProf tables to support enhanced reporting flexibility in the Profitability Report Mart (*italicized fields in CustProf have been flagged as Key fields*):

ProdProf

- RecCount

CustProf

- RecCount
- *ACCT*
- *DEPT*
- *PROD*
- *OfficerID*
- *PoolType*
- *SourceTable*

NOTE: SourceTable was already a field in CustProf, but it has been updated to a key field.

► RPPS Pricing Request redesign

Redesigned the Pricing Request and Scenario structure, which removed the Pricing Request data table page. The Pricing Request page is now a grouping of scenarios where you can easily navigate to your scenarios without clicking through into a Pricing Request. You can now add and compare scenarios directly from the Pricing Request page as well as create new pricing requests.

Pricing requests

Some additional description

Pricing requests									
	Pricing request	Scenario	Saved&Locked	Relationship	Relationship manager	Created by	Created date	Modified date	Action
<input type="checkbox"/>	PR 1						08/29/2023	08/29/2023	+Scenario
<input type="checkbox"/>		Scenario 1	Yes				08/29/2023	08/29/2023	
<input type="checkbox"/>		Scenario 2	No				08/29/2023	08/29/2023	
<input type="checkbox"/>		Scenario 3	No				08/29/2023	08/29/2023	
<input type="checkbox"/>	PR 2						01/25/2023	08/29/2023	+Scenario
<input type="checkbox"/>		Scenario 1	No				01/25/2023	08/29/2023	

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► Drivers and transactions page: New sort and filter function

Added sorting and filtering to the **CAP Surveys > Drivers and Transactions** page. Use this function to sort and filter the list by Driver ID.

► RPPS CFF calculations update: Exclude months with no data

Updated the Cash Flow Forecaster calculation engine in RPPS to be more precise when predicting future 12-month cash flows. When historical months have no data, they are now excluded from future 12-month cash flow calculations.

► Non-interest calculation method: Spread Method updates

Updated the Account Growth drivers so that you can select a default spread method other than the "Days" method. Added a SpreadMethods tab to the Account Growth drivers table, in which you input a default spread method for each budget account. If you do not select a default, the "Days" method remains the default option. You retain the ability to make changes directly in the plan file via the dropdown menu.

► Non-interest Account Growth Rate: Calculation method updates

Added the ability to input a Balance Growth Rate Method for non-interest calculation methods to match the functionality for balance sheet calculation methods. Now, non-interest calculation methods (Axiom Annual Growth Rate and Axiom Annual Growth Rate With Manual Adjustment) have two input choices for Balance Growth Rate Method:

- Annual Growth Rate
- Remaining Base year then Annual Growth Rate

NOTE: Set these input variables from the plan file Acct Growth Drivers table.

► New Map Income page

Added the ability to map fee and non-interest income to the InstrumentProfitabilityMapping table from the web via a new page in the Command Center. This functionality replicates the previous web-based thick client functionality.

Access this page using the following path:

Command Center > Customer Account Profitability > Map Income

► Budget calculation methods update: New Manual Adjustment method

Updated the Budget calculation methods (Non-Interest and Simple Interest) on the balance sheet to include a method of Manual Adjustment. You can now select Manual Adjustment as a planning method, which presents by-month entry cells in which you can type in an adjustment to the balance.

What to know before upgrading

IMPORTANT: You must apply the latest Axiom upgrade before applying any 2023.4 Axiom product upgrades. Axiom upgrades are backward compatible so you can upgrade different products at different times, but you must upgrade to Axiom 2023.3 before the first product upgrade. Refer to the **Axiom Release Notes** for consideration before upgrading.

When upgrading to the 2023.4 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.

Prepare and schedule 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 case to request a Preferred Upgrade Window:
 - Log in to [Syntellis Central](#).
 - Click **Support Cases**.
 - Click **Schedule an upgrade**.
 - Enter your Preferred Upgrade Window information.
 - Click **Submit**.
3. **Complete manual configuration updates** – After installing the upgrade, review any manual setup steps to enable features for this version.

Get 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

[Syntellis Central](#) provides centralized self-service content and resources for the Axiom Healthcare 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 and certification content, including on-demand, video, webinars, labs, and instructor-led courses.
- Ask a question in the peer-to-peer Syntellis Community.
- Submit a Support issue, find suggested content, and manage any outstanding issues directly with Support.

Issues fixed in 2023.4

The following table lists the resolutions for issues addressed in 2023.4, released on October 25, 2023:

Issue	Description
<p>77046</p> <p>Case number: 00522882</p> <p>Inconsistent calculations between new and legacy versions of RPPS.</p>	<p>Summary: In RPPS, cash flow and RAROC calculations were inconsistent from the previous RPPS version.</p> <p>Resolution: Updated calculations and outputs so that they match as expected.</p>
<p>72967</p> <p>Case Number 00519079</p> <p>Recon InstrumentProfitability to InstrumentAllocationStage report does not work - Escalate to Product</p>	<p>Summary: In Profitability, the Recon InstrumentProfitability to InstrumentAllocationStage report read incorrect column names (the report read preferred names).</p> <p>Resolution: Column lists for AQ1 now properly populate the InstrumentProfitability tab.</p>
<p>74595</p> <p>Case Number 00524056</p> <p>Fees and Expenses in Instrument Tables not Saving to CustProf</p>	<p>Summary: The CustProf import did not save fees and expenses.</p> <p>Resolution: Introduced a new utility that correctly identifies the columns list for CustProf and ProdProf imports. This utility ensures fees and expenses are saved as expected.</p>
<p>75188</p> <p>Case Number 00524395</p> <p>Escalation: CAP - InstrumentProfitability receiving multiples of expected fees</p>	<p>Summary: The Instrument Profitability import received multiple expected fees.</p> <p>Resolution: Updated the import transforms to eliminate multiple pooltypes for the same data.</p>
<p>74442</p> <p>Case Number 00521130</p> <p>FI Suite defect - Payroll does not support annual expense caps on Bonus Plans but does allow user to enter expense limits into drivers</p>	<p>Summary: In the payroll forecaster, annual expense limits for Bonus Plan calculations were overwritten.</p> <p>Resolution: Limits set in the drivers are now honored in the payroll forecaster.</p>

Issue	Description
73555	Summary: The Capital amount displayed on a new pricing request was double the correct rate.
Case Number 00520995	
Capital Doubling on New Pricing request	Resolution: The application now reflects the correct Capital amounts.