# Empyrean Solutions

# Empyrean Data & Analytics Features & Roadmap Presentation

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# EMPYREAN DATAVERSE – RELEASE CALENDAR

December 2023
Release

December 2024
Release

August 2024
Release
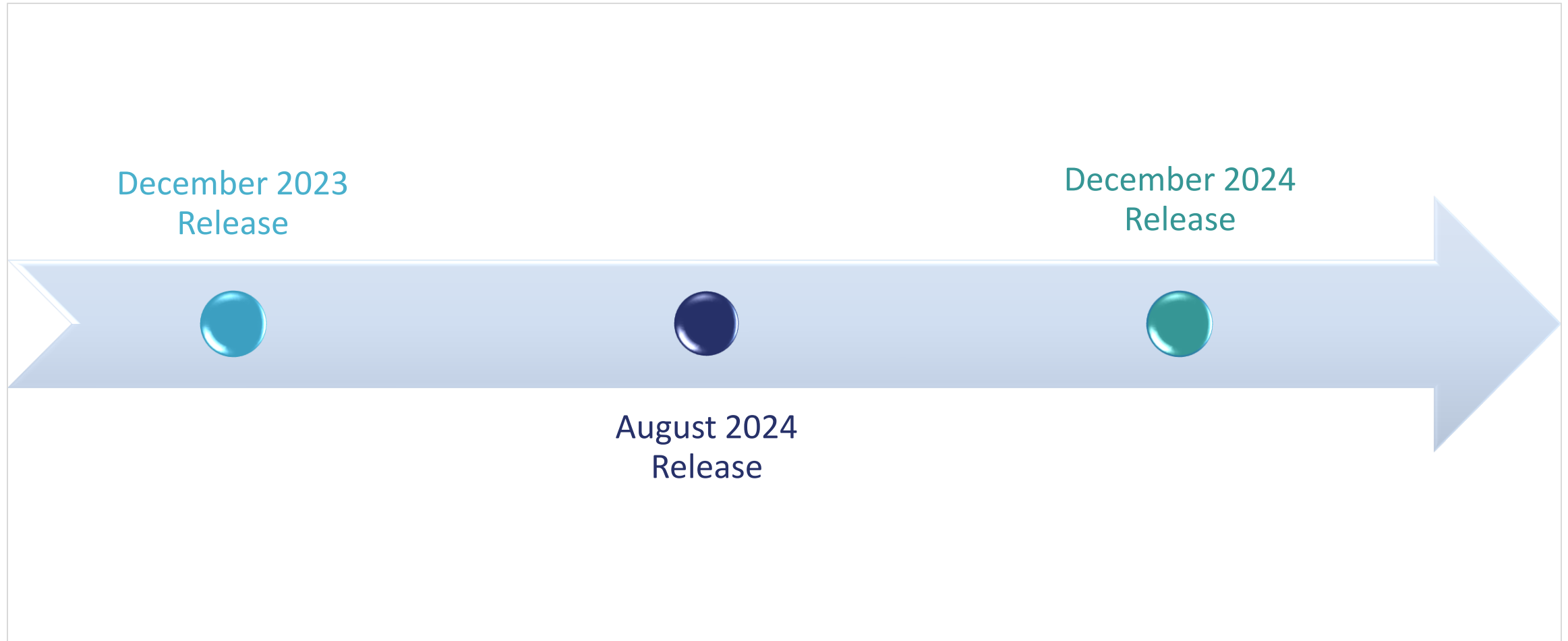
# EMPYREAN DATAVERSE – DECEMBER 2023

| RELEASED |
|---|

- Auto Import after upload
- Multiple CSV file upload
- Reconciliation ALM & Budget accounts read from file (not settings) for "GL Only"
- Reconciliation report export
- Daily General Ledger

- Other small enhancements:
  - Reconciliation settings changes
  - Profitability Data Source Types
  - Validation Warnings on Navigation Pane
  - GL Reconciliation Validation Tracking

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# EMPYREAN DATAVERSE – AUGUST 2024

| IN PROCESS | |
|---|---|
| ▪ Import Excel files<br>▪ Auto upload<br>▪ Keep inactive data sources inactive across months<br>▪ Show/hide data sources<br>▪ Warnings on GL acct field<br>▪ Changes to GLBS account type<br>▪ GL Recon options | ▪ Other small enhancements:<br>   ▪ Auto collapse right sidebar on BS/IS<br>   ▪ IssueIndexLevel field to support TIPS in ALM<br>   ▪ RelationshipID field in retail customer import to support profitability<br>   ▪ Table index<br>   ▪ Min length of red/yellow import status bar<br>   ▪ Warning on upload when column in file that is not in data requirements<br>   ▪ Instrument flags for BI reporting<br>   ▪ Changes to adjusted BS logic for Xfermargin |

*Additional "smaller" items are planned in each release. Priorities are subject to change.

ALM • CAPITAL & LIQUIDITY STRESS TESTING • FTP • ECL • DEPOSIT ANALYTICS • BUDGETING & PLANNING • PROFITABILITY

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# AUTO UPLOAD – AUGUST 2024
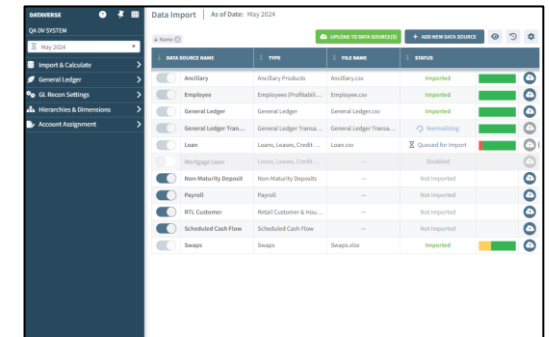
| **1** | Create Data Files | **2** | Transfer Files | **3** | Auto Upload to DV |
|---|---|---|---|---|---|



**Core / DWH**

- 📄 General Ledger
- 📄 Loans, Leases, Credit Card
- 📄 Time Deposit
- 📄 Non-Maturity Deposit
- 📄 Customer
- 📄 Employees

**Azure Blob Storage**

| User Automation | Empyrean Automation |
|---|---|

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| PLANNED & SUBJECT TO CHANGE | |
|---|---|
| <ul><li>Account assignment</li><li>Calculated fields</li><li>Import of Exogenous lines (statistics)</li><li>FTP posting to mismatch/funding center & income statement</li><li>Instrument-level FTP reporting "Standard Library"</li><li>Self-service reporting</li></ul> | <ul><li>Other small enhancements:<ul><li>Some small UI updates</li></ul></li></ul> |

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# EMPYREAN "EXPLORER" – WHAT IS IT
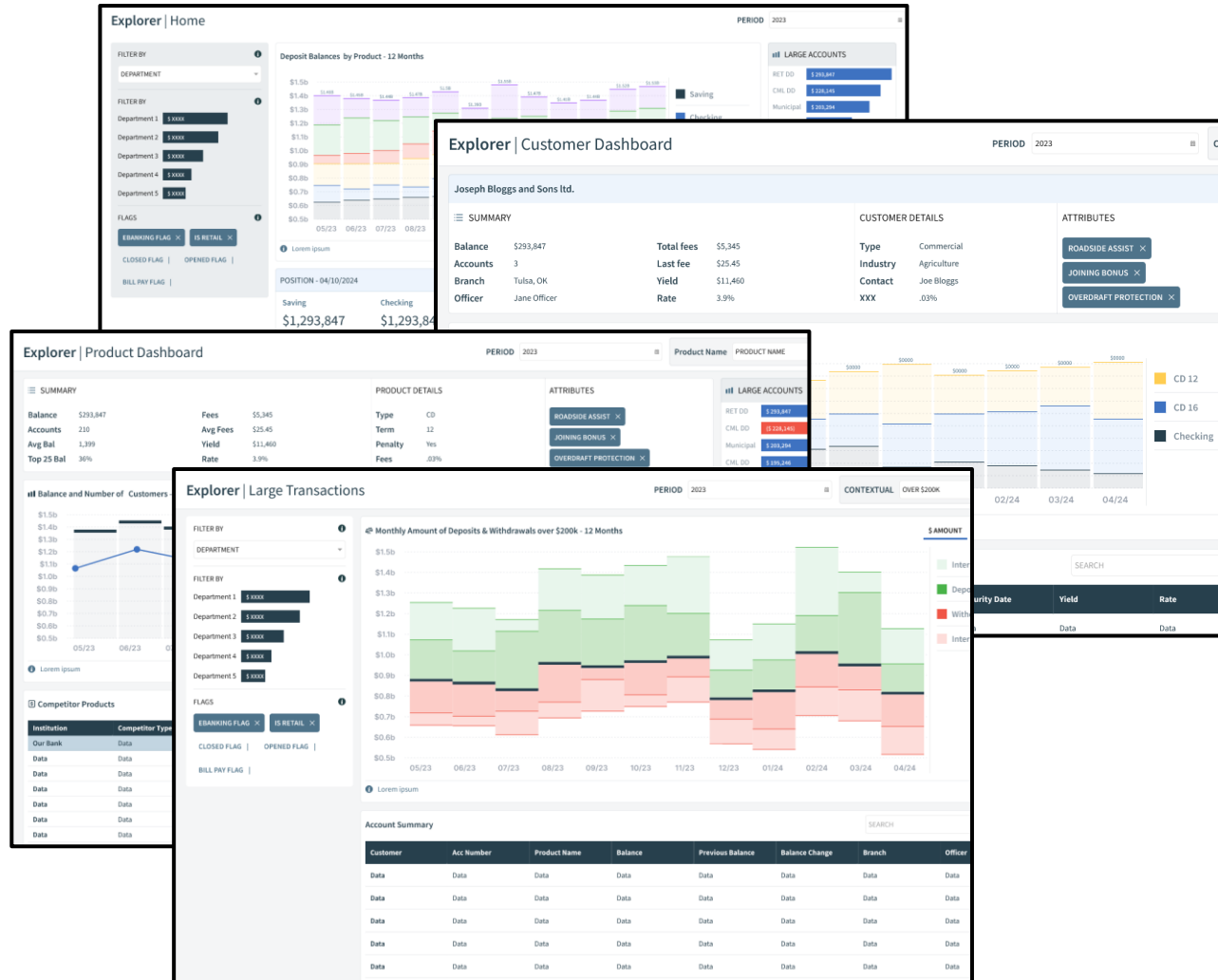


- Predefined, out-of-the-box (OOTB) dashboards
- Designed for predefined personas
- Utilizing data in Dataverse
- Empyrean Reporting
- Easy to understand
- Quick to get insights
- Five (5) partner clients
- Mid-2025 release

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# EMPYREAN DATAVERSE – ROADMAP

| FUTURE & SUBJECT TO CHANGE | |
|---|---|
| **Strategic** | **Functional** |
| ▪ Hierarchy manager | ▪ Append data |
| ▪ Data viewer | ▪ Deposits data source |
| ▪ ETL capabilities | ▪ Multiple period import/delete |
| ▪ Peer & benchmark data/reporting service | |
| ▪ Historical assumptions | |
| ▪ Loan Analytics (ie. prepay analysis) | |

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# EMPYREAN DATAVERSE – PRIORITIES POLL

- Scan QR code to complete survey

Join by Web **PollEv.com/empyrean**

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# 2025 Dataverse Roadmap

Hierarchy manager: central area to manage all hierarchies across all applications (Profitability, Planning, ALM)

Data viewer: visibility & validation reporting on imported data

ETL capabilities: ability to assign and calculate field values

Peer & benchmark data: benchmark and reporting across all Empyrean customers

Loan analytics: analysis of loan portfolio (ex. prepay analysis)

Append data: add additional columns to existing data sets

Multiple period import/delete: import (and delete) mult SEE MORE ⌄ 'n single file

# EMPYREAN DEPOSIT ANALYTICS – ROADMAP

| FUTURE & SUBJECT TO CHANGE | |
|---|---|
| ■ Integration with DV | ■ Cannibalization models |
| ■ Portfolio & Account analysis dashboards | |
| ■ Time Deposit modeling | |
| ■ Segmentation (product & subproduct) optimization/automation | |
| ■ Calibration optimization/automation | |
| ■ Additional methodologies | |
| ■ Automated audit/validation document prep | |

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