Parent/Child Organisation Structure

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An administrator can control what the child organisation can do in a number of areas, this supersedes the abilities of their role. An administrator can control the following;

- The number of licences given to a child organisation
- Whether a child organisation can override the parent organisations provider panel
- Whether a child organisation can override the parent organisations report cover sheet
- Whether a child organisation can override the parent organisations service levels
- Whether a child organisation can override the parent organisations investment strategy
- Whether a child organisation can override the parent modeller journey
- Whether a child organisation can create custom assets
- Whether a child organisation can override the growth rates for Comparator/Illustrator

The administrator can also see all users in the child organisations and what roles each user has with the ability to reassign roles and delete users etc.

An administrator in your child organisation can undo any changes made by you with regards to the users in the child organisation except adding more licences to their organisation (reassigning licences).

They would also not be able to give themselves the permissions described above.

What a parent organisation cannot control except through roles are the following;

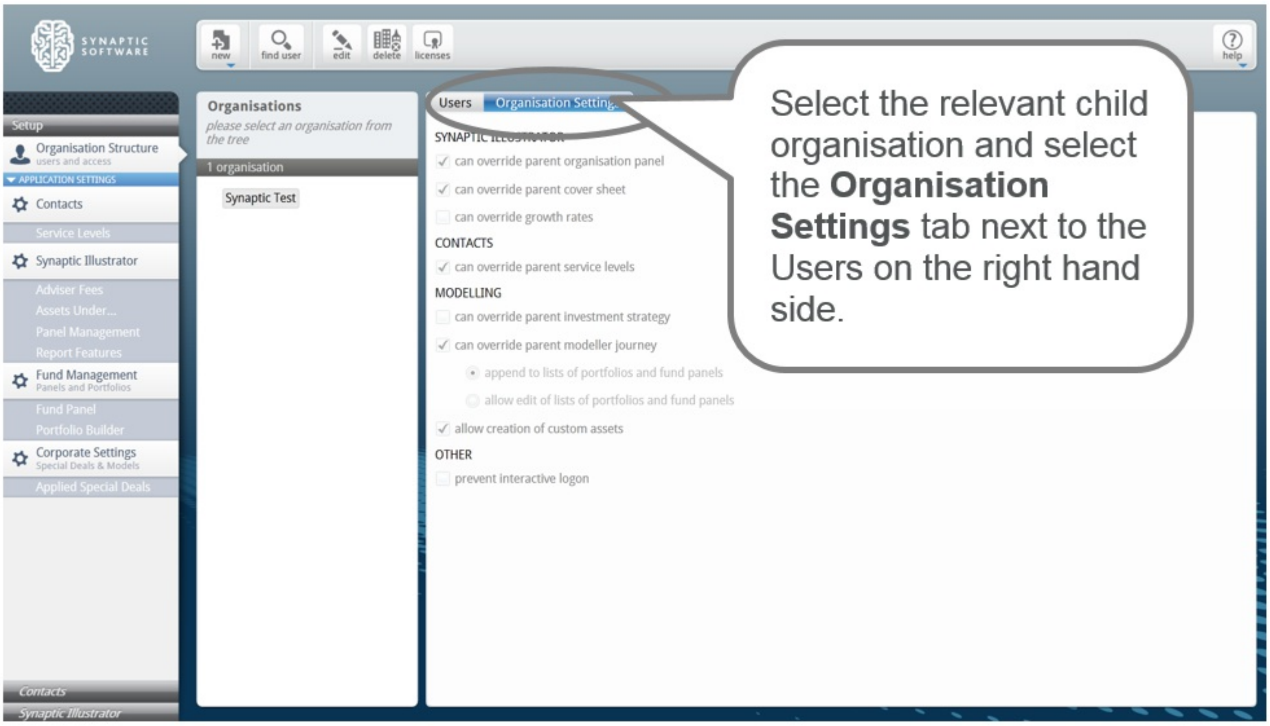
- Adviser fees
- Assets under management
- Whether Factsheets are mandatorily included in reports (report features)
- Fund panel

The administrator can create portfolios and publish them to all child organisations by labelling the portfolio as public. Portfolios can be shared in 3 ways, labelling as;

- Private – only that user can see them
- Internal – all users in that organisation can see them
- Public – all users in that organisation and their child organisations can see them

The administrator can also create fund lists (called Fund Panels in the Synaptic Client interface) and publish them to all child organisations as above (Synaptic Portfolio Builder only). The list of override permissions above that have a tick in them generally mean that a user can depart from the parent organisations default setting which has been inherited by the organisation. The child organisation will automatically take on the platform, wrapper panel and off platform products that have been setup by the parent organisations.

If child organisations are allowed to amend the panel set by the parent organisations, they will need to be given permission in the **organisation settings** area.



SYNAPTIC ILLUSTRATOR

☑ can override parent organisation panel

☑ can override parent cover sheet

□ can override growth rates

CONTACTS

☑ can override parent service levels

MODELLING

□ can override parent investment strategy

☑ can override parent modeller journey

● append to lists of portfolios and fund panels

○ allow edit of lists of portfolios and fund panels

☑ allow creation of custom assets

OTHER

□ prevent interactive logon

Select the relevant child organisation and select the **Organisation Settings** tab next to the Users on the right hand side.

- Tick ‘**can override parent organisation panel’** if the administrator wants to give the child organisation permission to amend the platform/provider panel settings.

- Tick '**can override parent cover sheet'** if the administrator wants to give the child organisation permission to have their own report cover sheet.
- Tick '**can override growth rates'** if the administrator wants to allow the child organisation to be able to override the growth rates used by Comparator/Illustrator.
- Tick '**can override parent service levels'** if the administrator wants to allow the child organisation to be able to set up their own service levels.
- Tick '**can override parent investment strategy'** if you want to allow the child organisation to set up their own investment strategy.
- Tick '**can override parent modeller journey'** if the administrator wants to allow the child organisation to set up their own modeller journey.
- Tick '**allow creation of custom assets'** if the administrator wants to give permission for the child organisation to create their own custom assets. (they will still inherit the custom assets the administrator creates and sets to "public")
- Tick '**prevent interactive logon'** if the administrator uses the single sign on (SSO) mechanism and want to restrict the child organisation from accessing the software from the web page directly. The SSO mechanism is used by back office systems to send client data to Synaptic and this flag prevents users from logging in to the system from the web without going through the back office system (this is mostly for data integrity but can also be used to control compliance).