



THE PLATFORM DNA

ORGANISATION MANAGER GUIDE

What you can do as an Organisation Manager

Overview

The Organisation Manager role can add and suspend users for their organisation, and manage user roles and permissions.

Audience

This document is intended for any organisations **Organisation Manager**.

Requirements

To be made an **Organisation Manager** please get in touch with us using details below in the Contact section. The Organisation Manager will typically be a person with an oversight role within the organisation. We will seek confirmation from a member of your organisation known to us to have a signing authority.

Features

Below we walk through the main features which are available specifically to **Organisation Managers**.

Add Users and Setting Roles and Permissions

You can add users to the platform by navigating to **Organisation Settings >> Employees** and then clicking **Add a New Employee**

You will have the option of setting roles for the new user immediately, or when back on the **Employees** page you can set permissions by locating the chosen employee in the table (or using Search) and clicking the link text under the header **Roles**.

Suspend users

If you would like to prevent a user from having access to the platform, for example if an employees has left the organisation, you can suspend their access. This does not delete any data associated with the user account, for regulatory purposes so that you may perform and audits required in future.

Contact Us

If you would like to learn more, please get in touch.

Call us on **0330 123 9830**

Lines are open 8.30am to 5pm, Monday to Friday. As part of our commitment to quality service and security, telephone calls may be recorded.

Email us at investing@tavistockplatform.com

We aim to provide an initial response to your query on the same working day.

Address

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