

# Synaptic Insight user guide

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# 1. Definition

## 1.1 Purpose

This document is intended to help users of Synaptic Insight navigate the software and understand the screens and data output.

## 1.2 Minimum requirements for Synaptic Insight

### 1.2.1 Software requirements

Synaptic insight requires either Internet Explorer 6.0 (or above) or Firefox 2.0 (or above). Java script must also be enabled within the browser. We also recommend having a spreadsheet utility, such as Microsoft Excel, that is capable of opening CSV or TSV file formats.

### 1.2.2 Internet connection speed

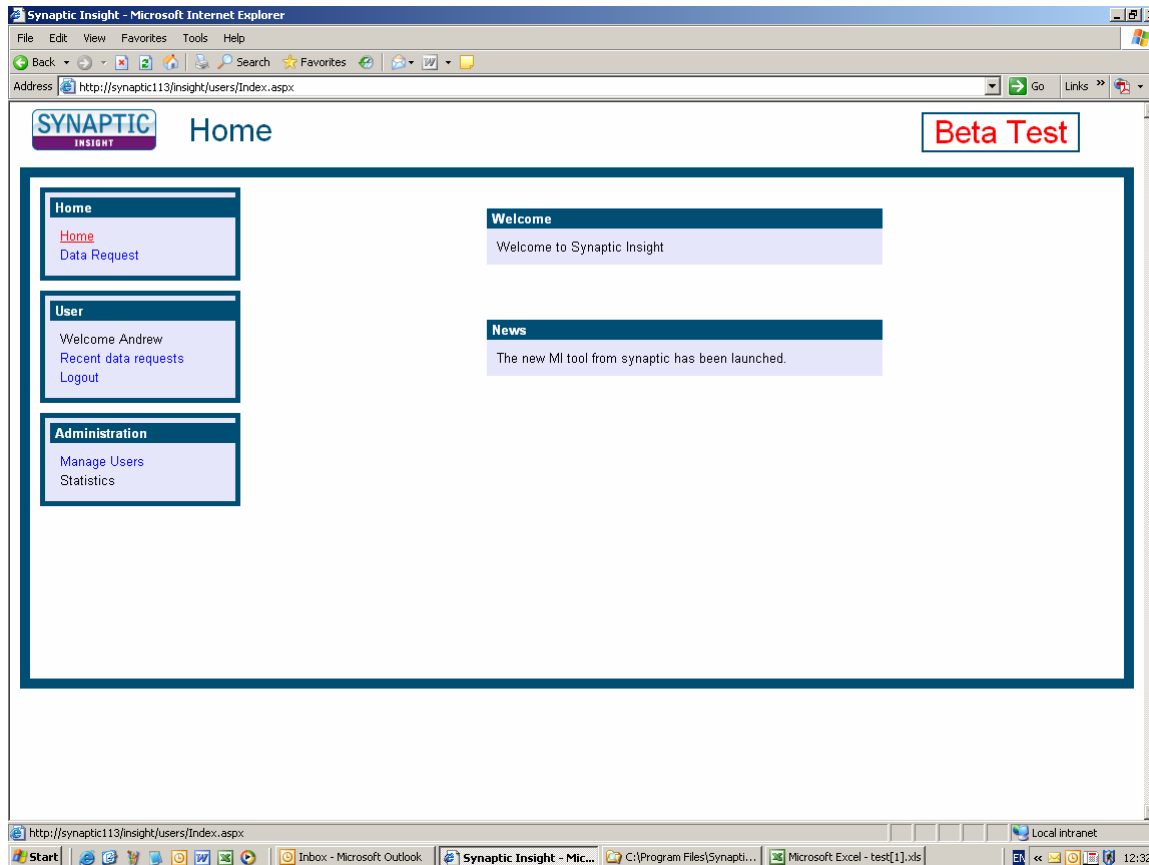
We recommend that you use Synaptic Insight over a broadband connection wherever possible. Because of the depth of the data available, some data downloads are particularly large and may take some time.

## 2. Home

### 2.1 The home page

To arrive at the home page, you will need to log onto the system via the following link and enter your personal logon details.

<http://insight.synaptic.co.uk/Insight/login.aspx>



### 2.2 Using the home page

The **Home** link will take you back to the home page from any screen.

The **Data Request** functionality should be used to determine the type of output you require. This includes selecting the product types, product bases, date ranges and MI type.

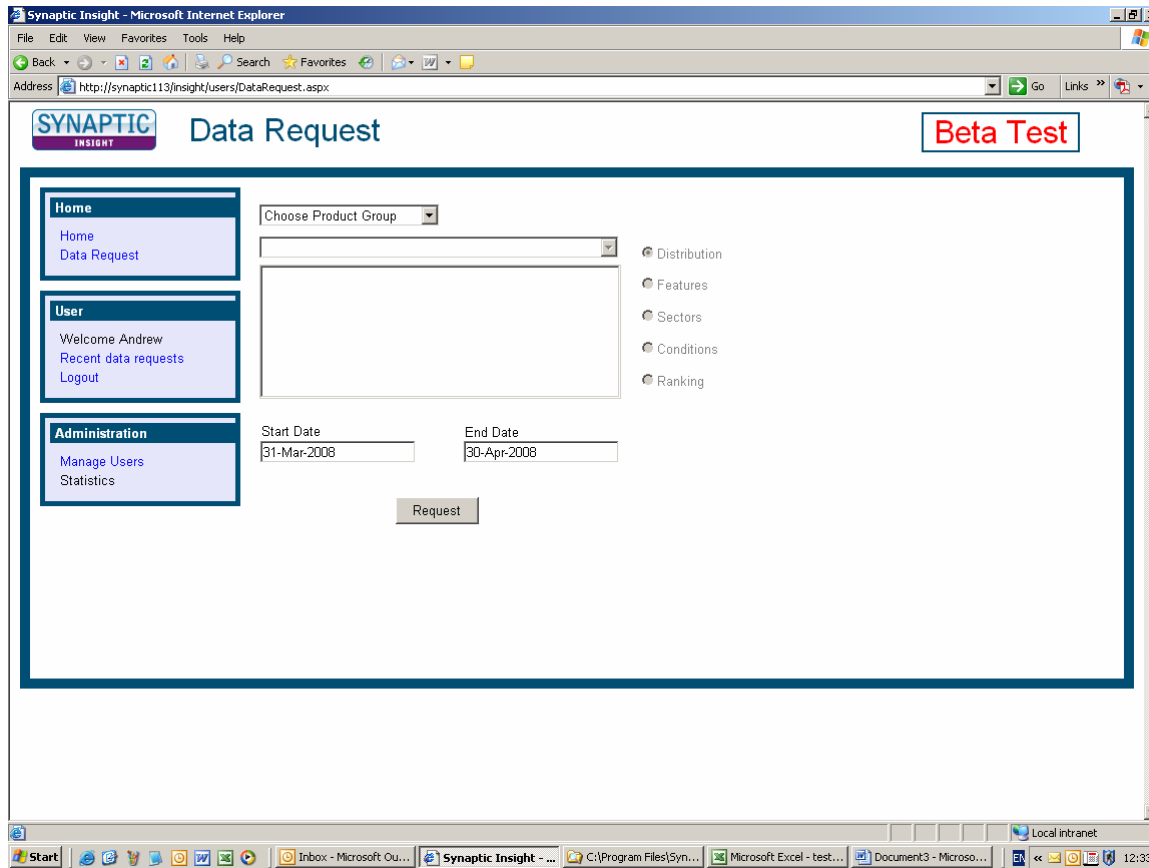
**Recent data requests** allows you to retrieve any previously stored data requests. Accessing previous information in this way will mean that the processing speed is kept to a minimum.

The **Logout** link will log you out of the software. The software will automatically log users out after 30 minutes of inactivity.

The **Administration** section is currently reserved for Synaptic representatives only.

## 3. Data request

### 3.1 The data request page



### 3.2 Using the data request page

The data request page is to be used to set the criteria for your required output. In all cases, there are only seven steps to follow:

#### Step one

The product group field lists all of the available product groups (e.g. pensions, investments, etc.) irrespective of the modules that you are entitled to.

#### Step two

The product type drop down will only show you product types for which you are licensed to use.

#### Step three

The product bases field will be populated to show all product bases for the product type selected. It is only possible to select one basis, however, the output will contain consistent field IDs, allowing you to merge MI for product bases should you need to do so.

#### Step four

Select the MI type required from the options available. Only those options available under your licence agreement will be enabled. It is only possible to select one MI type at a time. Depending on your license agreement, the MI types available may differ across product types/bases.

#### Step five

The start date can be set to any date permitted under your licence agreement. It should be noted that longer periods will take longer to produce the output due to the increased volumes of data to be processed.

#### Step six

The end date will be set at the most recent data date, which will often be published on the home page. Synaptic Insight will be updated on a monthly basis. The end date can however be changed if necessary.

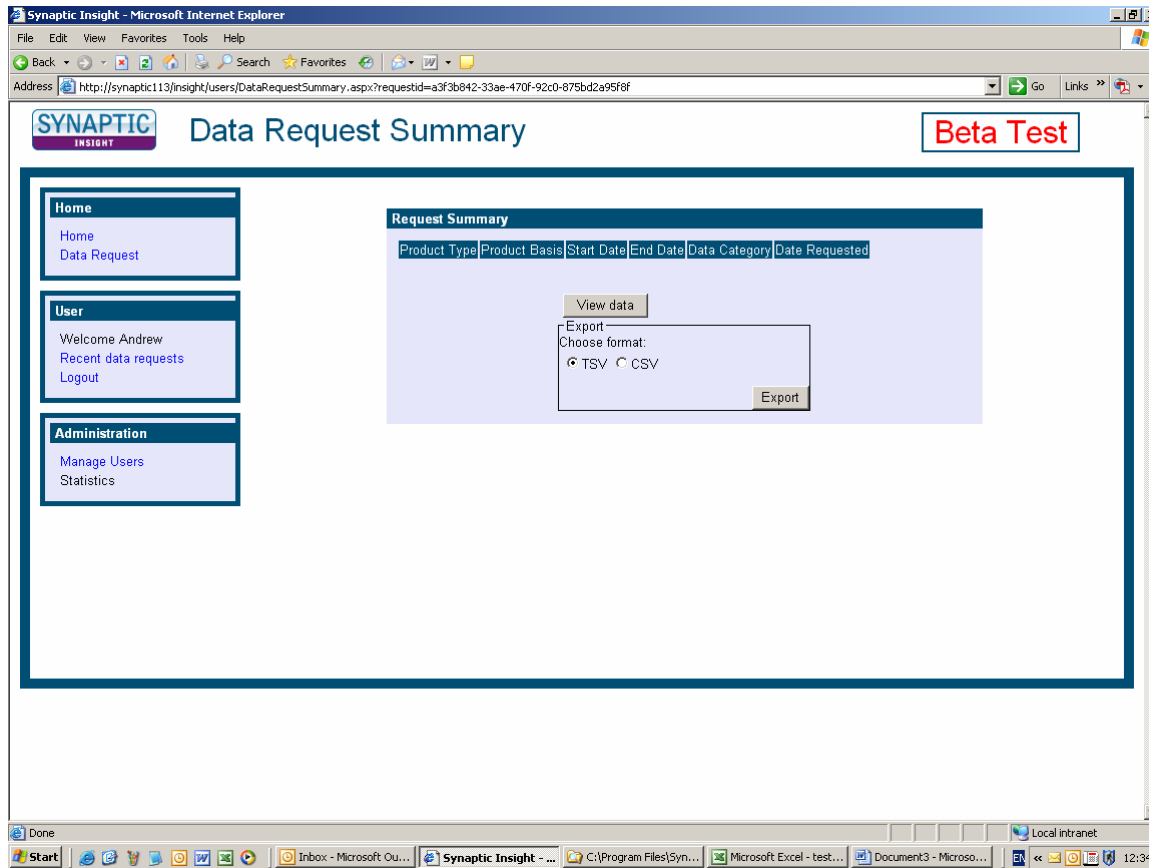
#### Step seven

When you have completed all of the steps above, click the **Request** button.

If you wish to extend your licence agreement to include other product areas, MI types or wider date ranges, please contact [anita.white@synaptic.co.uk](mailto:anita.white@synaptic.co.uk).

## 4. Data request summary

### 4.1 The data request summary page



### 4.2 Using the data request summary page

**View data** allows you to view the results on screen to give you an overview of the data that is exportable based upon your criteria selection. This option has no analysis functionality as we recommend this is done using exported files only.

**Export** allows you to select your preferred output type (TSV or CSV). Whichever format is selected, the output can be opened in Excel. Each output will contain a series of mandatory fields, which are intended to give a clear picture of the methodologies used during each piece of research included. These mandatory fields will allow you to merge the outputs from different product types/bases if necessary.

The **mandatory fields** are as follows and will always be shown in columns A to M:

SearchId	This is a unique identifier that is attached to each piece of research. This ID can be used to link the output produced for different MI types, such as Distribution and Features.
ProductTypeId & ProductTypeName	Synaptic uses both a numerical identifier and textual name for each Product Type. The purpose of having both in the output is to cater for any name changes to Product Types, which can occur from time to time. When filtering using Product Type information always filter using both fields separately to ensure that the same number of records are returned (if so, no name change has occurred during this period).

ProductBasisId & ProductBasisName	Synaptic uses both a numerical identifier and textual name for each Product Basis. The purpose of having both in the output is to cater for any name changes to Product Bases, for example <i>Maxi ISAs</i> became <i>Stocks and Shares ISAs</i> with effect from 6 April 2008. When filtering using Product bases information always filter using both fields separately to ensure that the same number of records are returned (if so, no name change has occurred during this period).
LastChangeDate	This confirms the exact time and date that the research was last saved. It is possible for IFAs to recall previously saved research. In these cases the last date will be recorded.
NetworkName	This will confirm which Network the IFA is a member of, or if the IFA is Directly Regulated.
County	The county within which the IFA's office is based.
postcode	The first half of the postcode within which the IFA's office is based.
Hasfeatures*	TRUE – This indicates that the IFA made at least one selection within the Features tab of the software. FALSE – No Features were selected.
Hassectors*	TRUE – This indicates that the IFA made at least one selection within the Sectors tab of the software. FALSE – No Sectors were selected.
Hasconditions*	TRUE – This indicates that the IFA made at least one selection within the Conditions tab of the software. FALSE – No Conditions were selected.
hasRanking*	TRUE – This indicates that the IFA made at least one selection within the Ranking screen of the software and chose to rank the remaining contracts. FALSE – Ranking was not completed.

\* There are specific MI Types available to confirm the exact selections made in these areas.

Columns N, onwards will potentially differ for each MI request. Typically, the fields immediately following the **mandatory fields** will include information specific to the product type/basis, which are known as **product specific fields**. Typically these will include data items such as:

- Client age
- Client sex
- Client smoker status
- Retirement age/term
- Contribution amount
- Sum assured
- Income
- Selected Contract/Company (see Distribution below)

Please note that some product types/bases may not have product specific fields available.

Following the **product specific fields** will be a series of columns to reflect the product types, product bases, date ranges and MI output type requested.

## Distribution

Selectedcontractname & selectedcontractid	Synaptic uses both a numerical identifier and textual name for each Contract Name. The purpose of having both in the output is to cater for the occasions when providers remarket a product under a new identity. When filtering using selected contract information always filter using both fields separately to ensure that the same number of records are returned (if so, no name change has occurred during this period).
Selectedcompanyname & Selectedcompanyid	Synaptic uses both a numerical identifier and textual name for each Company Name. The purpose of having both in the output is to cater for the occasions when providers remarket themselves, for example <i>AIG Life</i> became <i>AIG Life Wealth Management</i> . When filtering using selected company information always filter using both fields separately to ensure that the same number of records are returned (if so, no name change has occurred during this period).
Display#Rank	This is the ranked position of each contract. Within Synaptic research tools it is possible for a number of contracts to be ranked equally, however, these obviously have to be displayed on separate rows. It is therefore possible for say, a Display2 contract to show a Display2Rank score of 1. When analysing information in the output, you should be mindful that Display position are not necessarily the Rank position.
Display#ContractName & Display#ContractId	See notes within Selectedcontractname & Selectedcontractid
Display#CompanyName & Display#CompanyId	See notes within Selectedcompanyname & Selectedcompanyid

## Features

The column headings will be driven by the selections made during all research for the period selected. If a feature is shown this indicates that at least one IFA has used this feature as part of their research. For each piece of research listed in the output, each cell will be populated to show the selection made:

- 0 – the IFA declined the feature as this was not appropriate for their client
- 1 – the IFA chose “must have” – this would eliminate any contracts NOT offering this feature
- 1 – the IFA chose “must NOT have” – this would eliminate any contracts that DO offer this feature
- 3 – the feature was not available at the time the research was conducted. This will generally occur when Synaptic has added new features to a product basis, or when fields become redundant and are removed.
- BLANK – no selection was made.

## Sectors

The column headings will be driven by the selections made during all research for the period selected. If a sector is shown this indicates that at least one IFA has used this sector as part of their research. For each piece of research listed in the output, each cell will be populated to show the selection made:

- 0 – the IFA declined the sector as this was not appropriate for their client
- 1 – the IFA chose “must have” – this would eliminate any contracts NOT offering at least one fund within this sector
- 3 – the sector was not available at the time the research was conducted. This will generally occur when all fund links to a particular sector are removed; when fund links to a new sector are created OR when sector names are changed.
- BLANK – no selection was made.

## Conditions

The column headings will be driven by the selections made during all research for the period selected. If a condition is shown this indicates that at least one IFA has used this condition as part of their research. For each piece of research listed in the output, each cell will be populated to show the selection made, e.g.

"= 0" – this would indicate that the IFA wished to eliminate all contracts which did not show a zero for this particular condition. This would potentially be used for say, Exit Charges.

"<=16" – this would indicate that the IFA wished to eliminate all contracts which showed a value greater than 16 for this particular condition. This would potentially be used for say, minimum ages where the client is a child.

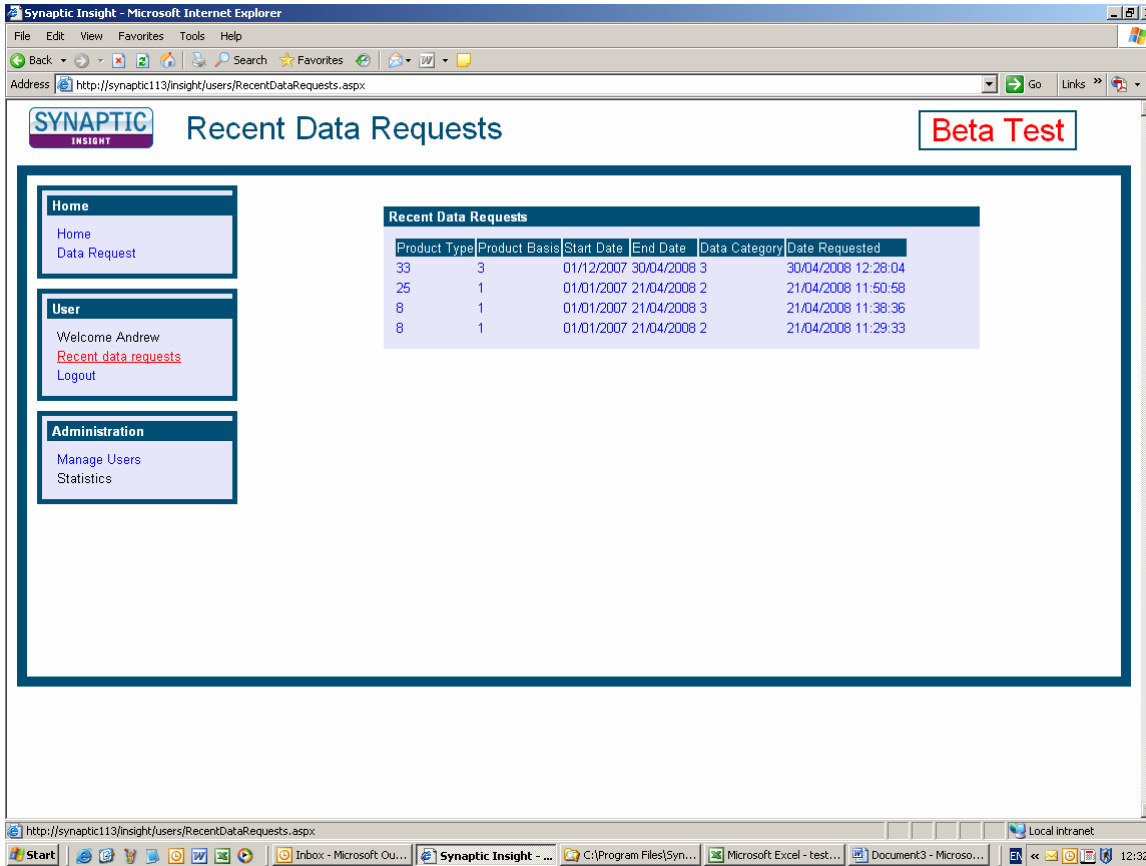
">=90" – this would indicate that the IFA wished to eliminate all contracts which showed a value lower than 90 for this particular condition. This would potentially be used for say, maximum ages where the IFA has an older client wishing to invest in an investment bond.

"N/A" – the feature was not available at the time the research was conducted. This will generally occur when Synaptic has added new features to a product basis, or when fields become redundant and are removed.

BLANK – no selection was made.

## 5. Recent data requests

### 5.1 The recent data requests page



The screenshot shows the Synaptic Insight web application interface. The page title is "Recent Data Requests" and it includes a "Beta Test" badge. The navigation menu on the left has three sections: "Home" (with links for Home and Data Request), "User" (with links for Welcome Andrew, Recent data requests, and Logout), and "Administration" (with links for Manage Users and Statistics). The main content area displays a table of recent data requests.

Product Type	Product Basis	Start Date	End Date	Data Category	Date Requested
33	3	01/12/2007	30/04/2008	3	30/04/2008 12:28:04
25	1	01/01/2007	21/04/2008	2	21/04/2008 11:50:58
8	1	01/01/2007	21/04/2008	3	21/04/2008 11:38:36
8	1	01/01/2007	21/04/2008	2	21/04/2008 11:29:33

### 5.2 Using the recent data requests page

**Recent data requests** is used to store any previous data requests. This facility will allow you to recreate the output without having to complete the seven steps, as detailed in the **Data Request** section. The processing speed is much reduced as Synaptic Insight can simply recall the results of previous search requests, rather than having to compile the full data set.

To reproduce previous search requests, simply single click on the item required and follow the instructions for the **Data Request Summary**.