Can I distribute personal presets across the firm?

As described above, we recommend that presets are initially created in personal mode, so that they only apply to you. You then distribute the presets across your firm once you have finished editing them.

You can do this by clicking on the **Change preset mode** in the menu bar when editing the presets. This displays the same pop-up options window which appears when you first create the presets, and is illustrated by the screenshot below.
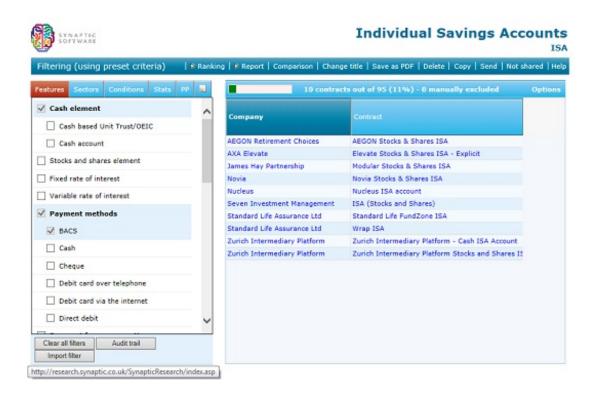

To distribute the presets across your firm, you simply change the mode from Personal to Everyone. The presets than take effect for all new research the moment that you click on the **Change Preset Mode** button – no delay, no need to e-mail files to users etc.

Locking the presets

You can choose whether to lock parts of the presets when distributing them across the firm. Each of the following can be locked or left unlocked independently:

- Filtering.

- Manual exclusion of contracts.

- Ranking.

The screenshot below shows an example of the effect on an adviser if the filtering has been locked. When they create new research for the product type, the preset filtering is automatically filled in and the adviser cannot undo it – the tick box for the filter is disabled.

Advisers can add further filtering (or further ranking, or further manual exclusion of contracts), but they cannot undo what the compliance officer has preset – unless they have been marked as trusted.