How do I create shared research for other users to import?

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Preset criteria, as described above, allow compliance officers to enforce their minimum requirements – e.g. that all recommendations of personal pensions must include PPI.

The system's sharing functionality is different: it provides a way for compliance officers to distribute filtering and lists of contracts which are optional rather than compulsory. They create conditions which advisers can use in their research, but don't have to.

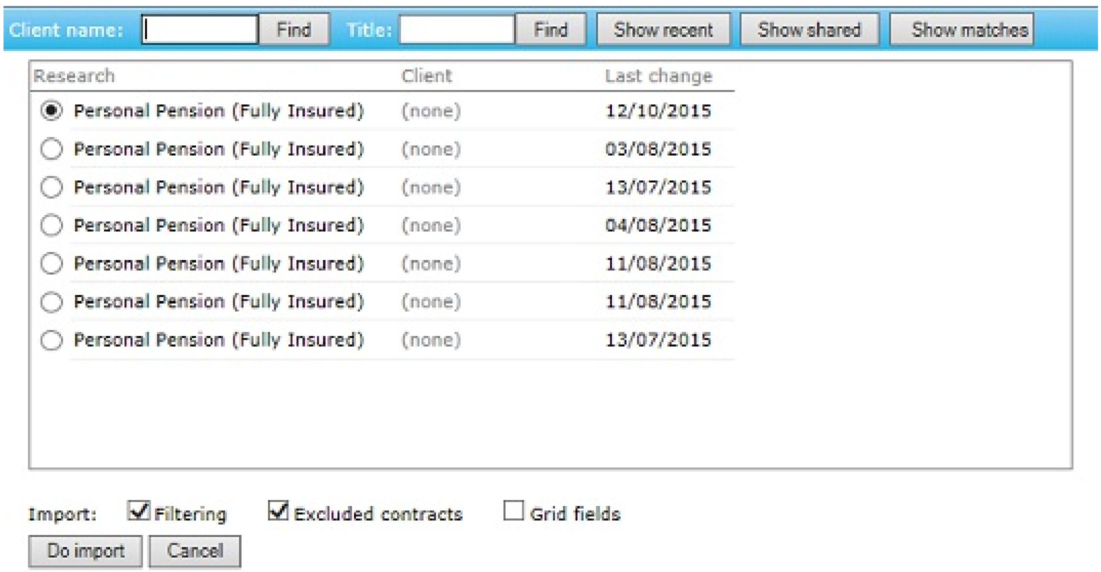
The most common example is model portfolios (where there's more than one per product type, and therefore they cannot be "preset"). A compliance officer can distribute a model portfolio to other users by doing the following:

- Start normal product-focused research into the product type.
- Define the model portfolio – either in terms of filtering on the sectors in which money is to be invested, or even filtering on specific funds (as illustrated by the screenshot).
- Change the title of the research to indicate its purpose (e.g. "Low-risk portfolio").
- Mark the research as shared. This is done by clicking on the not shared link in the menu bar for the research (which then changes to "Shared").

The screenshot to the below shows an example of research which has just been marked as shared by the compliance officer.

How advisers import shared research

Advisers then use the model portfolio by creating research in the normal way, and clicking on the **Import filter** button.



They choose the research to import, and the list is automatically pre-populated with all research which has shared by a compliance officer. (However, users can also use this facility to import from previous pieces of research of their own.)

The conditions defined in the shared research – i.e. the model portfolio – are then merged into the research which the adviser is conducting. In this example, any contracts which cannot implement the model portfolio are excluded.

Permission to create shared research

Users are only allowed to create shared research if they have been given this permission by the firm’s system administrator. Otherwise, the **Shared/Not Shared** link on the menu bar is simply hidden.