

When do presets take effect?

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Presets take effect when the user starts a new piece of research. The preset criteria are copied into the adviser's research at outset. They are also locked, if the compliance officer chooses this option.

Changes by the compliance officer to the preset criteria definition do not retrospectively change advisers' research.

If the compliance policy changes after a piece of research has been started, the adviser will need to start new research in order to see the revised preset criteria.
