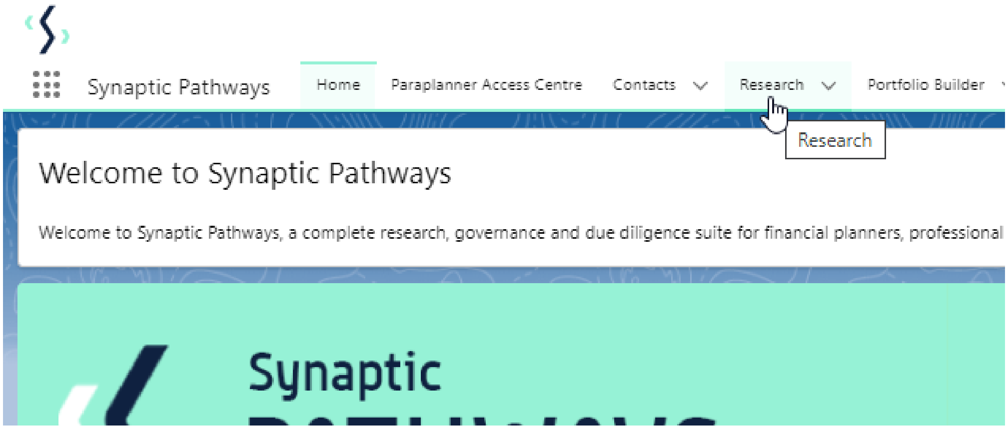
Comparison & Ex-Ante using a CIP - Creating in the research tab

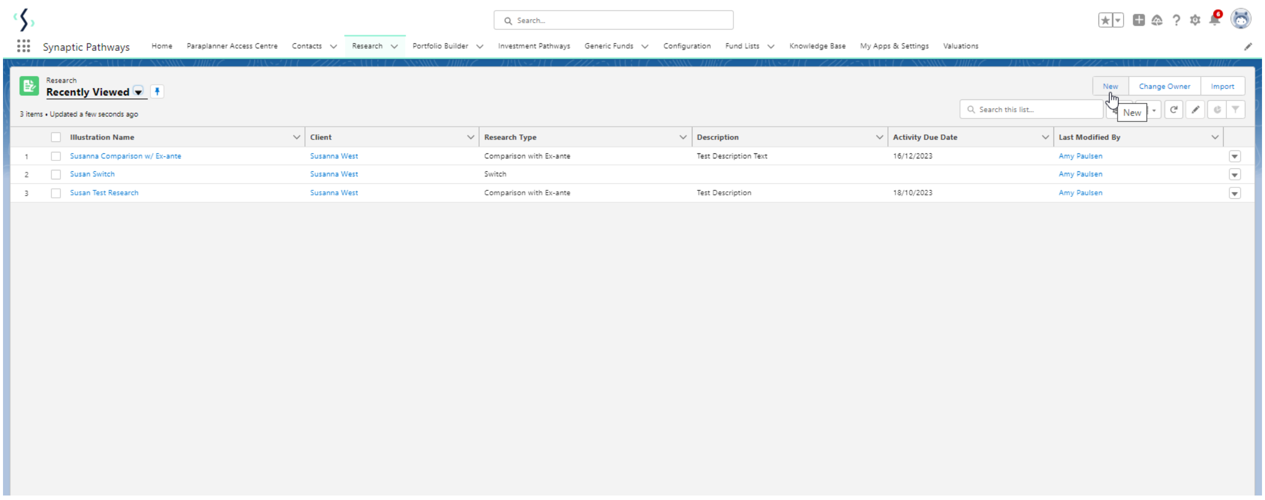
Last Modified on 16/10/2023 11:46 am BST

Research can be created directly from the Pathways homepage, through the Research tab and within a Contact record.

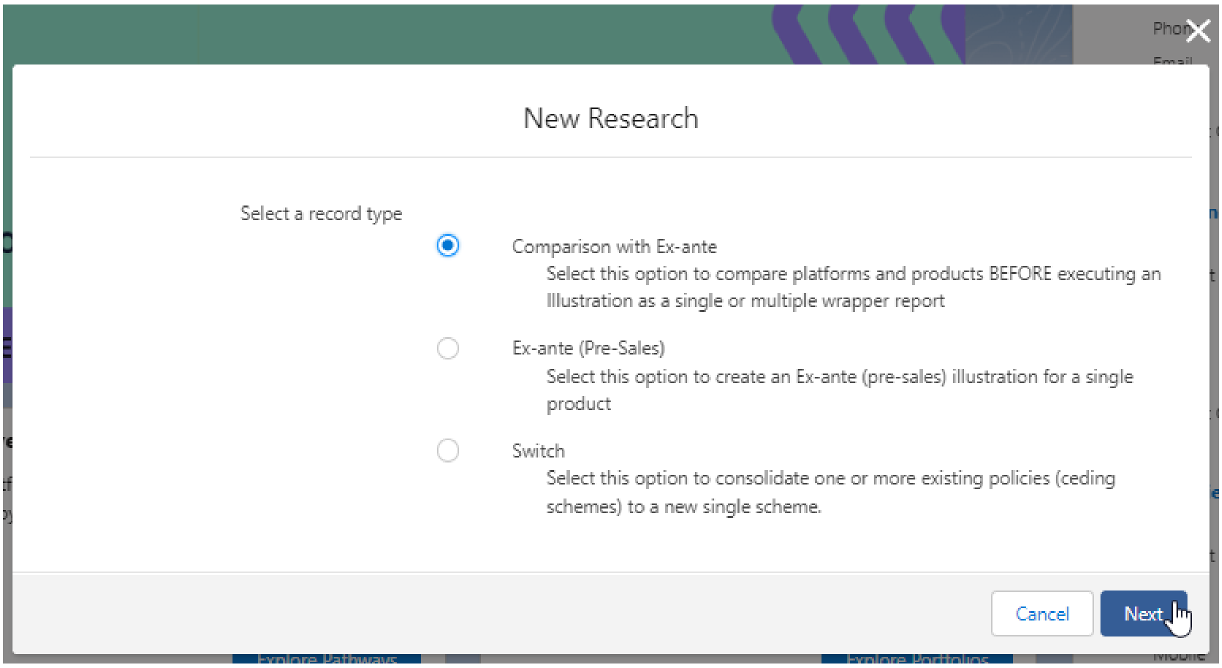
To create a comparison with ex-ante scenario in the Research tab, click into the tab from the Homepage:



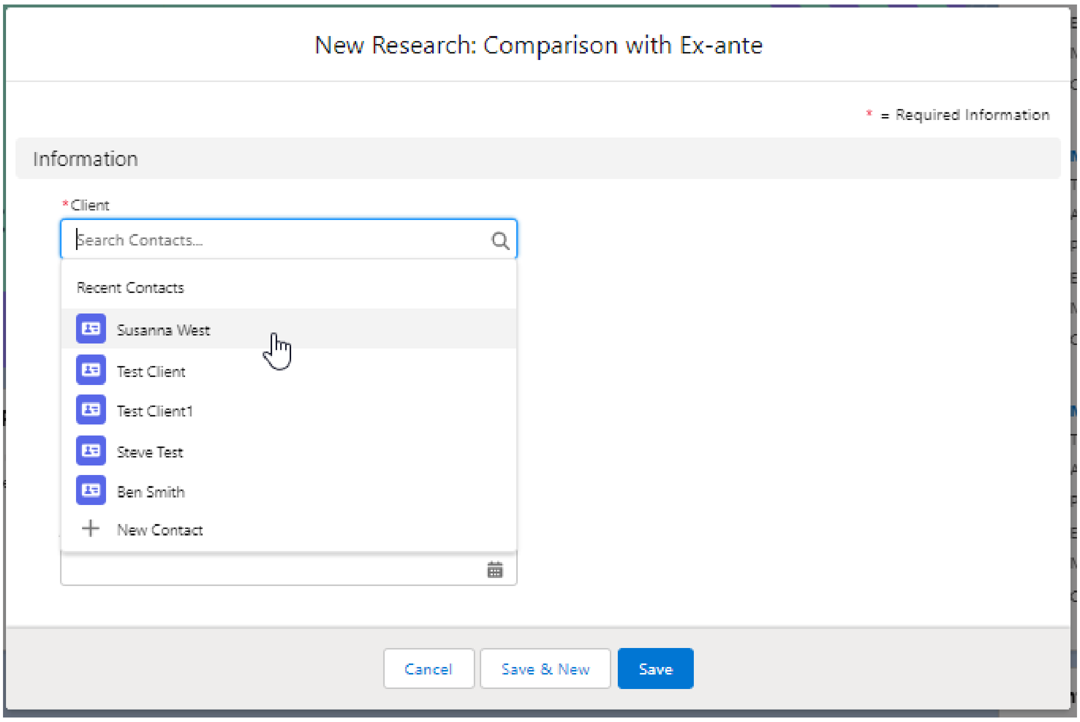
All existing research will be listed. Click **New** to create new research:



If you would like to run a comparison with an ex-ante report, select the first option. If you wish to create an ex-ante report without the comparison, select the second option:

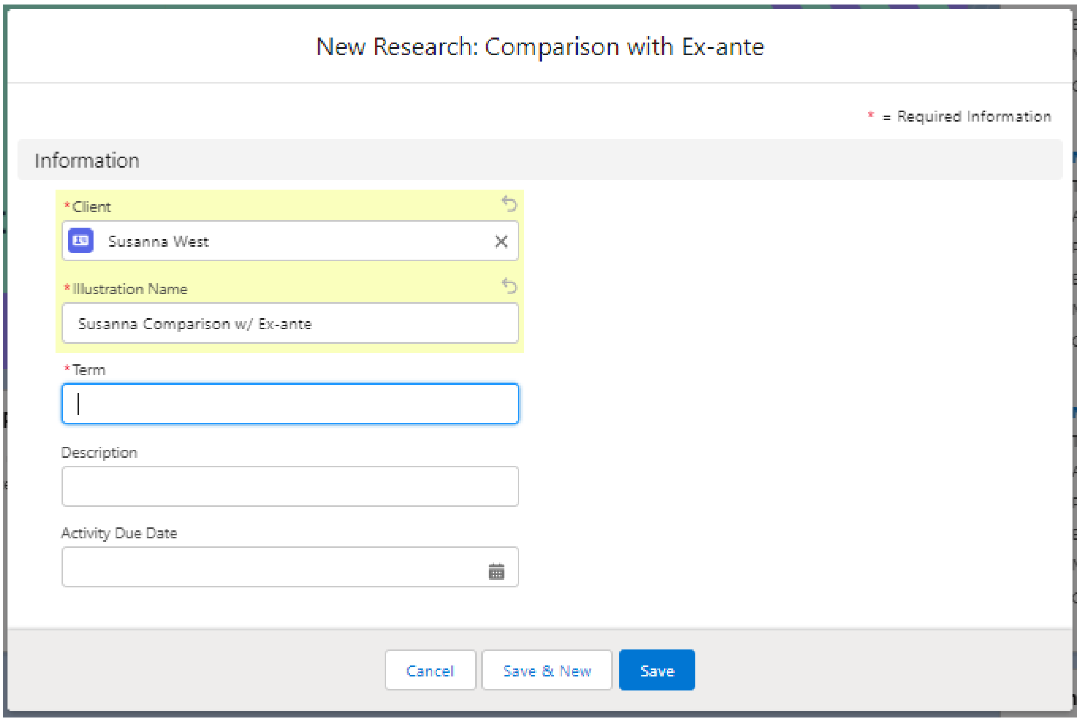


As we have created research within the Research tab, you will need to search for the client:

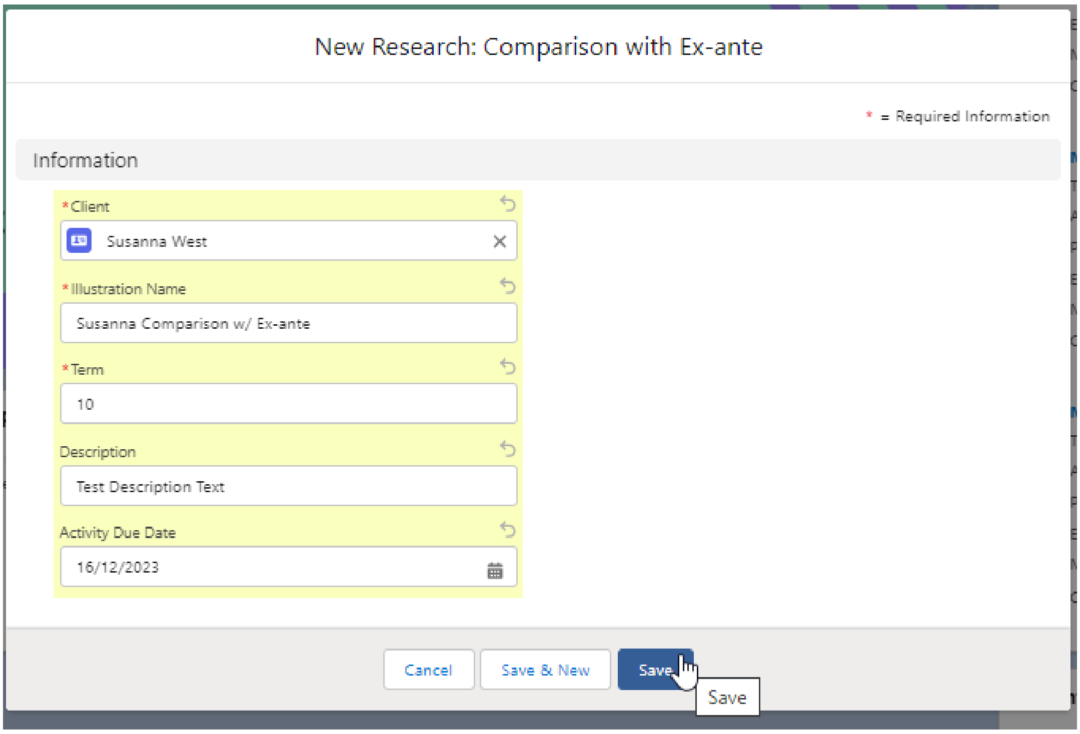


Note - Client field will already be completed if research is created directly in the contact record.

Complete the remaining fields:

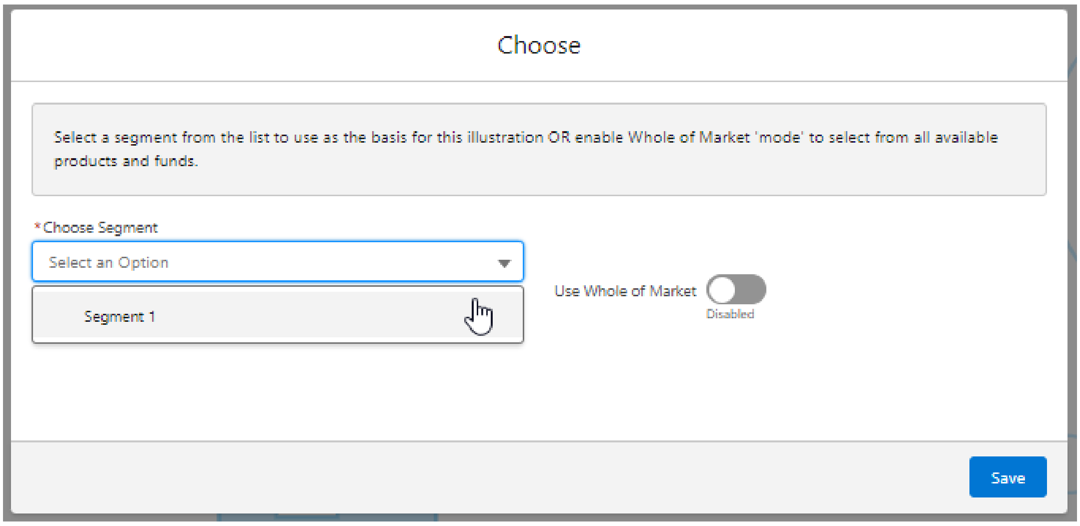


Save:



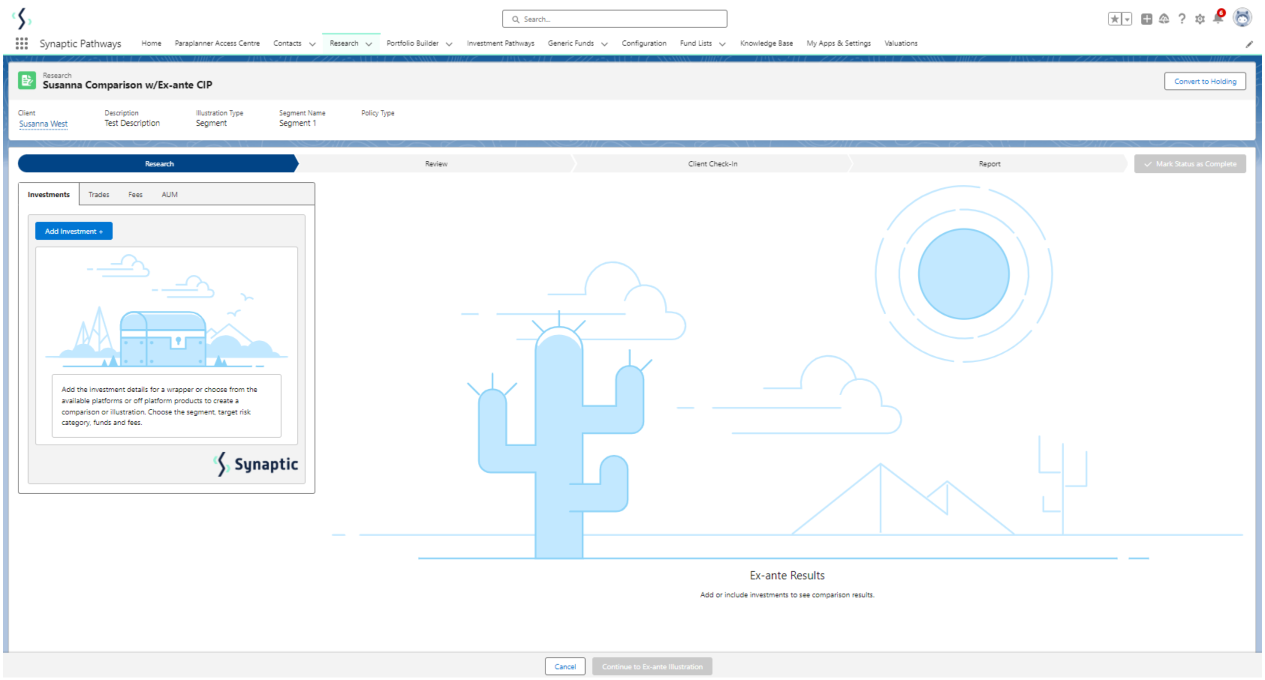
As we have configured a Central Investment Strategy, we will need to choose whether we use a segment or conduct Whole of Market research:

Please note - If the whole of market button cannot be enabled, you do not have the permissions to overwrite the segment/s assigned to you in the CIP. Your Administrator can assign this for you. Article **Pathways Administrator - Assigning Whole of Market permissions** explains how this is applied to your account.



Once the segment is selected, **Save**

This will take you directly into the research:



The segment can be found in the bar at the top of the screen: