How do I find old research?

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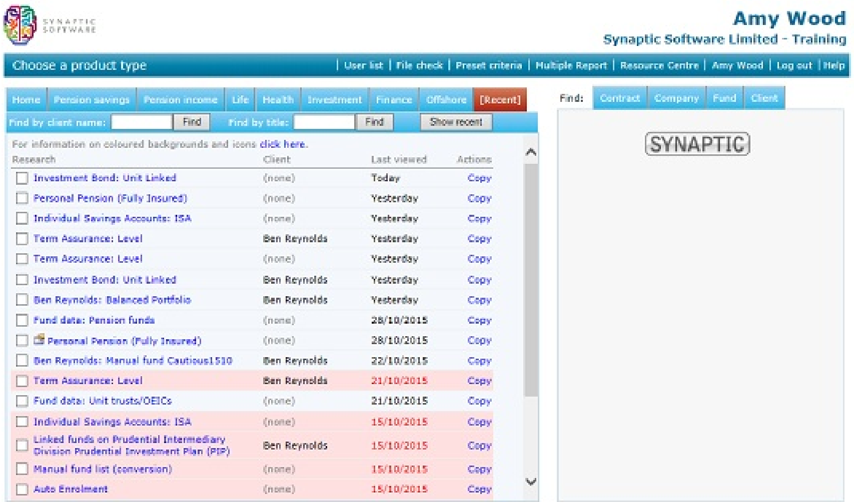
All research within the system is **automatically stored**. Therefore, you don't have to click on any sort of save button to tell the system to keep your work. Unless you deliberately delete old research, all the work you've done in the past 30 days can be re-opened using the Recent tab on the home page.

The first screenshot shows this **Recent** tab. By default, this lists the 20 most-recent pieces of research you have viewed – plus any research which has been sent to you by other people and which you haven't looked at yet.



You can re-open old research simply by clicking on it. This restores everything about the research, including filtering, ranking, the recommended contract etc.

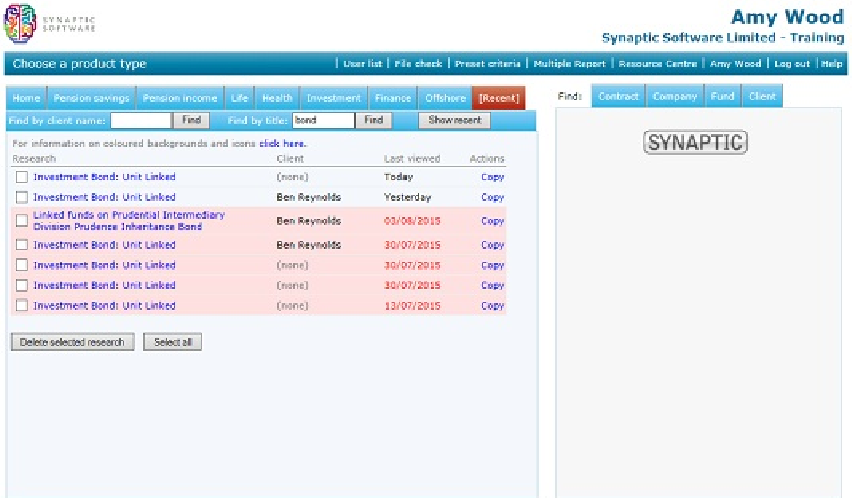
NOTE – if the old research was conducted in a previous month's data, it will be highlighted with a pastel red background. Any old research will always be re-opened into the current data set and may therefore be different to when the research was first performed.

<u>Finding stored research by client name</u>

You can find all the stored research for a client by entering part or all of their surname into the **Find by client** name box. (Alternatively, you can use the **Find Client** option on the right-hand side of the home page.)

<u>Finding stored research by title</u>

You can also search for stored research using its title. The screenshot below shows an example of searching for all research whose title matches "bond".



The section below describes how – and why – to change thetitle which the system gives to your research.

Creating copies of research

The **Copy** functionality (and the **Copy** link which appears next to each piece of research in the list) is described in the following section about creating new research based on existing research.

Deleting research

Stored research can be removed by opening it, and then clicking on the **Delete** link in the research’s menu bar. However, you can also use the **Recent** tab to delete multiple pieces of research at once. At the bottom of each list in the **Recent** tab is a **Delete** selected research button – as illustrated by the second screenshot. You simply tick the boxes next to the stored research you want to remove, and then click on this button.

Colour-coding and icons in the list of stored research

Lists of stored research are colour-coded and use icons to distinguish special attributes. See the first screenshot for examples of each of the following:

- Research which has been sent to you by another user, and which you haven't looked at yet. Hover the mouse pointer over the icon to see which user has sent you the research. This unread research is also highlighted in yellow.
- Research which was sent to you by someone else, and which you have already opened. Again, hovering the mouse pointer over the icon displays a tool tip telling you who sent the research.
- Research which you have marked as shared, so that other users can import the filtering and contract-exclusions from it.