How do I configure the Portfolio Builder tab to only show my portfolios?

List Views can be configured within Synaptic Pathways. In this article, we will take you through cloning an existing view & creating multiple views to show the information you require.

All list views default to recently viewed records. Creating your own view allows you to set what information you would like to see.

For example, If you have more than one licence in your company, you may want to set a view to show only your clients, configure the portfolio builder tab to show your portfolios or set the research tab to list all your research.

In this article, we will configure the Portfolio Builder tab.

Navigate into the Portfolio Builder tab:
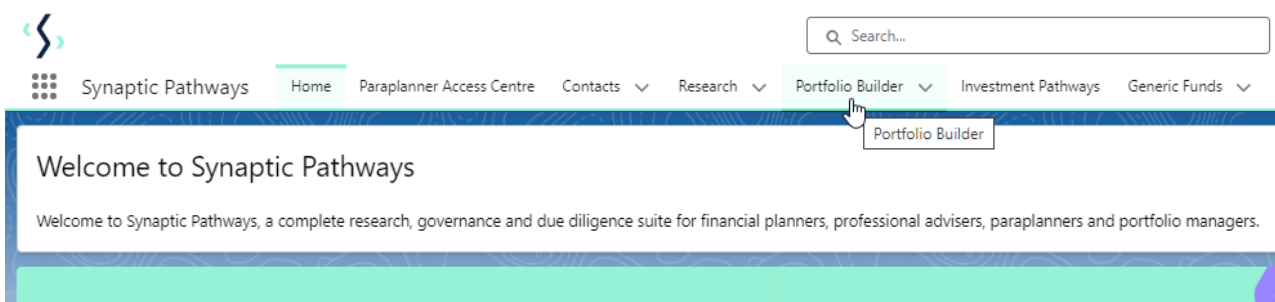
Once within the Portfolio Builder tab, click the down arrow next to **Recently Viewed** and select **All**
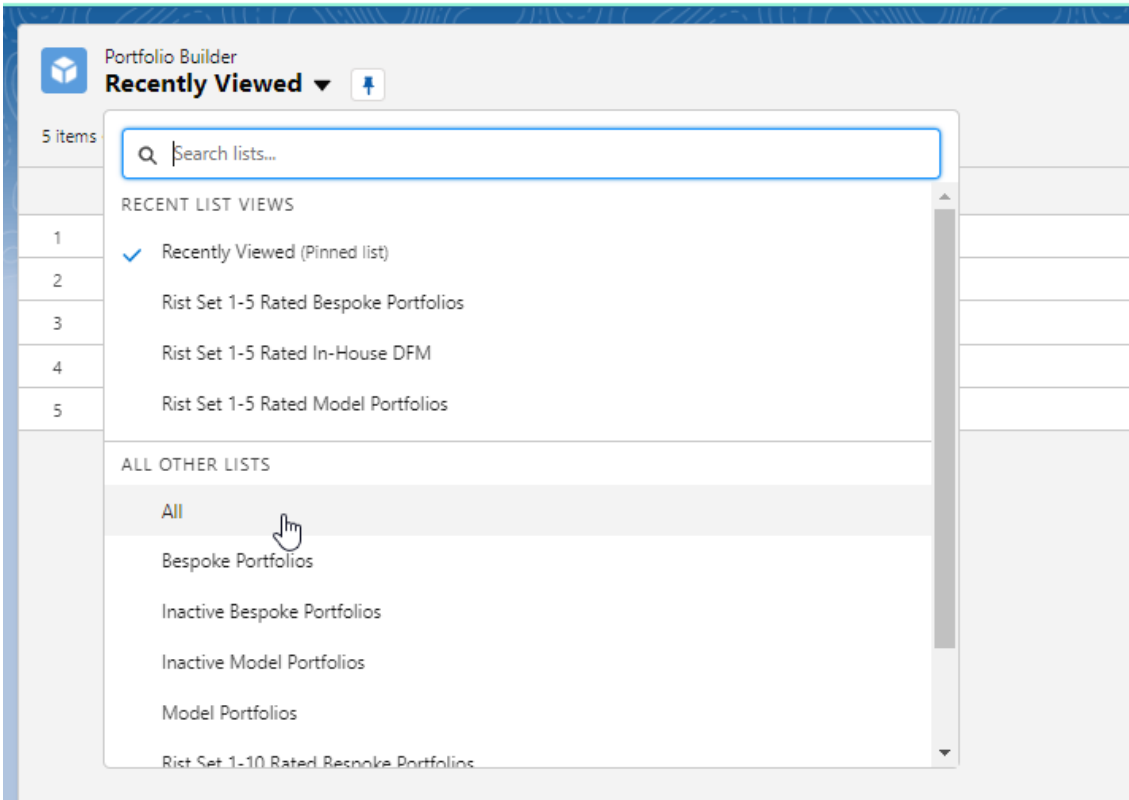
The **All** view can be pinned if you would prefer to view all portfolios rather than recently viewed. Note: This will include all portfolios created within your company.

We will clone the **All** view and configure this to only pull through portfolios you have created.

Click on **List View Controls** and **Clone**
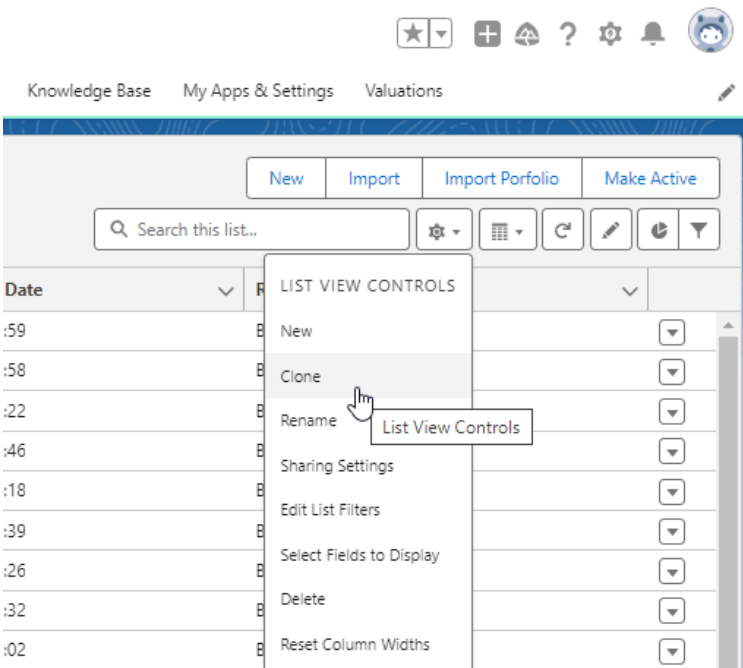
Keep the default **List Name** or enter you own:

Clone List View

*List Name

Copy of All

*List API Name ⓘ

Who sees this list view?

◉ Only I can see this list view

◯ All users can see this list view ⓘ

◯ Share list view with groups of users ⓘ

Cancel   Save

Clone List View

*List Name

My Portfolios

*List API Name ⓘ

My_Portfolios

Who sees this list view?

◉ Only I can see this list view

◯ All users can see this list view ⓘ

◯ Share list view with groups of users ⓘ

Cancel   Save

Set the permissions of the list. In this case, only you will be able to see this list view.

Who sees this list view?

◉ Only I can see this list view

◯ All users can see this list view ⓘ

◯ Share list view with groups of users ⓘ

Save

When the tab loads, a filter screen will open on the right side of the screen:

These filters allow you to set a number of options. For example, date ranges and fields that must contain or equal a value.

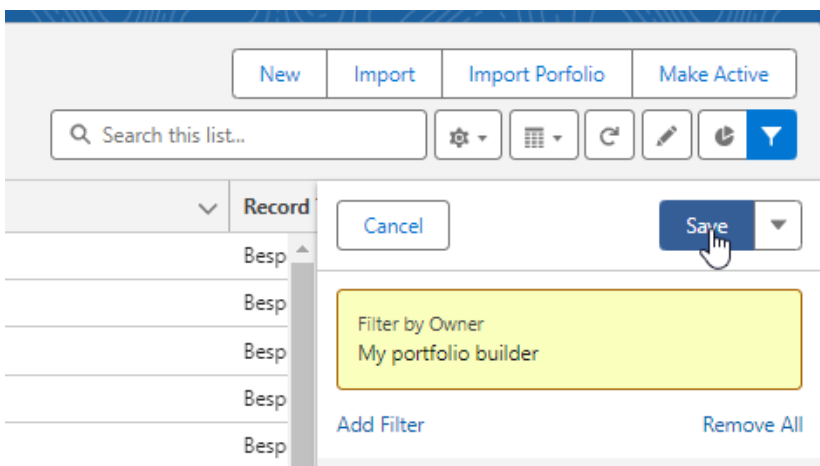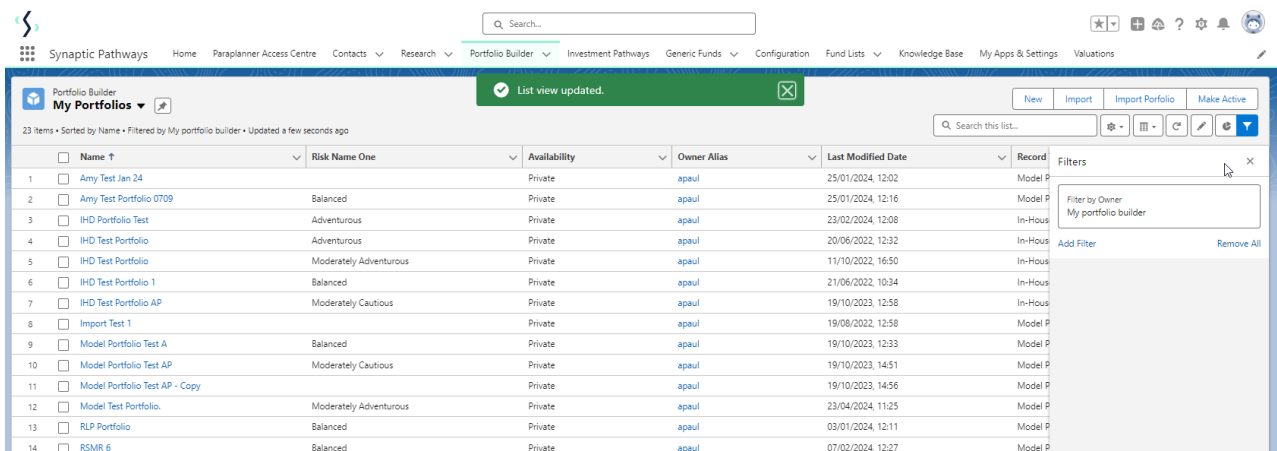We will select **My Portfolio Builder**

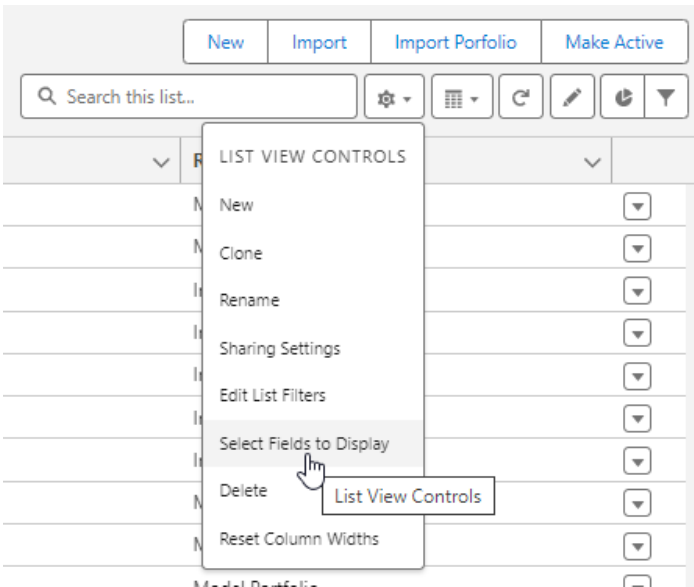**Done**

Add additional options through **Add Filter**
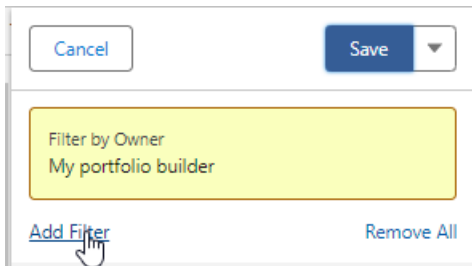
Click **Save**

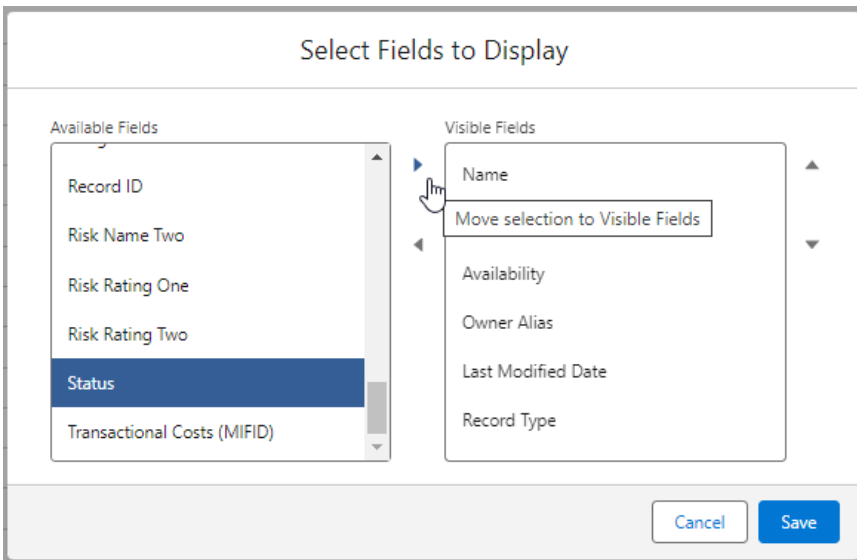The view will now return all portfolios created by you.

You are also able to include additional columns to the view through the **List View Controls** dropdown.
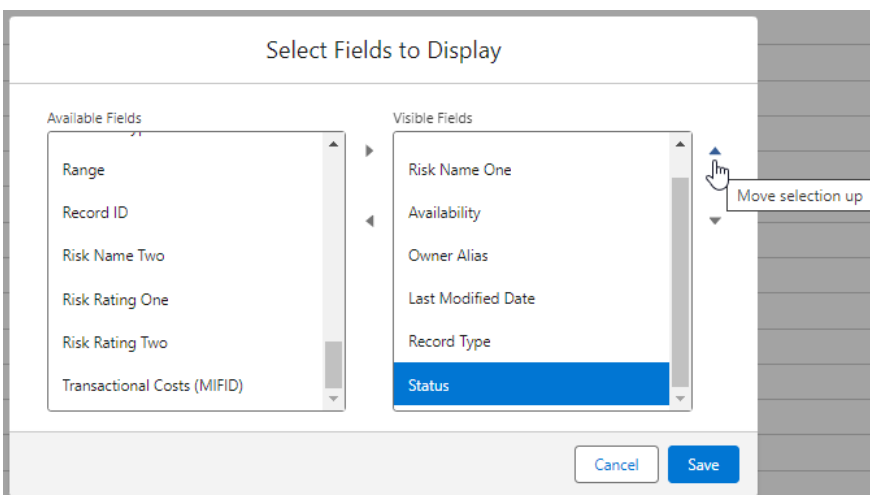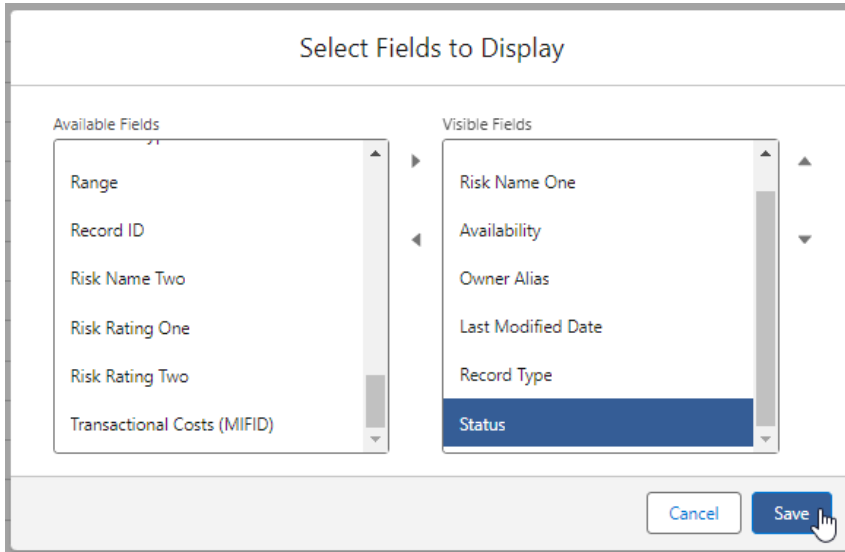
Click **Select Fields to Display**

Scroll through the list of **Available fields.** Select an option and use the arrow to move the field over to **Visible Fields**

The field will be added to the bottom of the list. Select the field and use the arrows to move the selection up or down the list. This reflects the order of the list view.

Save

The view has now been updated.

Each column can be sorted:

Multiple views can be created or cloned through the **List View Controls** area.

View all lists through the dropdown:

Portfolio Builder
My Portfolios ▾ 📌

23 items

Name		Availab
	Search lists...	
	RECENT LIST VIEWS	
IHD Tes	All	Private
IHD Por	✓ My Portfolios	Private
IHD Tes		Private
IHD Tes	Recently Viewed (Pinned list)	Private
IHD Tes	Rist Set 1-5 Rated Bespoke Portfolios	Private
Test Inh	Rist Set 1-5 Rated In-House DFM	Private
Model	Rist Set 1-5 Rated Model Portfolios	Private
Model		Private
Model	ALL OTHER LISTS	Private
RLP Por	Bespoke Portfolios	Private
Amy Te	Inactive Bespoke Portfolios	Private
RSMR 6	Inactive Model Portfolios	Private
Test Feb	Model Portfolios	Private
Test Po	Rist Set 1-10 Rated Bespoke Portfolios	Private
Amy Test Portfolio 0709	Balanced	Private