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

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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**

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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

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Keep the default **List Name** or enter you own:

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Only I can see this list view	
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Clone List View	
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Who sees this list view?	
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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

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

Q Search this list.	New	Import Import Po	
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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

	(New	Import	Import Porfolio	Make Active
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Add additional options through Add Filter

Cancel	Save 🔻
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The view will now return all portfolios created by you.

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	□ Name ↑ ∨ Risk Name One	 ✓ Availability 	✓ Owner Alias	✓ Last Modified Date	✓ Record F	Filters
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2	Amy Test Portfolio 0709 Balanced	Private	apaul	25/01/2024, 12:16		Filter by Owner
3	IHD Portfolio Test Adventurous	Private	apaul	23/02/2024, 12:08	In-Hous	My portfolio builder
4	IHD Test Portfolio Adventurous	Private	apaul	20/06/2022, 12:32	In-Hous A	Add Filter Remo
5	IHD Test Portfolio Moderately Adventurous	Private	apaul	11/10/2022, 16:50	In-Hous	
6	IHD Test Portfolio 1 Balanced	Private	apaul	21/06/2022, 10:34	In-Hous	
7	IHD Test Portfolio AP Moderately Cautious	Private	apaul	19/10/2023, 12:58	In-Hous	
8	Import Test 1	Private	apaul	19/08/2022, 12:58	Model P	
9	Model Portfolio Test A Balanced	Private	apaul	19/10/2023, 12:33	Model P	
10	Model Portfolio Test AP Moderately Cautious	Private	apaul	19/10/2023, 14:51	Model P	
1	Model Portfolio Test AP - Copy	Private	apaul	19/10/2023, 14:56	Model P	
12	Model Test Portfolio. Moderately Adventurous	Private	apaul	23/04/2024, 11:25	Model P	
13	RLP Portfolio Balanced	Private	apaul	03/01/2024, 12:11	Model P	
14	RSMR 6 Balanced	Private	apaul	07/02/2024, 12:27	Model P	

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

Click Select Fields to Display

	New	Import	Imp	oort Porfolio	Make Active
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Scroll through the list of **Available fields.** Select an option and use the arrow to move the field over to **Visible Fields**

Available Fields	Visible Fields
Record ID Risk Name Two Risk Rating One Risk Rating Two	Name Move selection to Visible Fields Availability Owner Alias
Status	Last Modified Date
Transactional Costs (MIFID)	Record Type

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.

Available Fields		Visible Fields	
Range	^ ▶	Risk Name One	1 Jm
Record ID		Availability	Move selection
Risk Name Two		Owner Alias	
Risk Rating One		Last Modified Date	
Risk Rating Two		Record Type	
Transactional Costs (MIFID)	-	Status	•

Save

Available Fields			Visible Fields	
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Risk Name Two			Owner Alias	
Risk Rating One			Last Modified Date	
Risk Rating Two			Record Type	
Transactional Costs (MIFID)	-		Status	•

The view has now been updated.

Each column can be sorted:

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Amy Test Jan 24		Private	apaul	25/01/2024, 12:02	Model Portfolio	🏲 Requires 💌
RSMR 6	Balanced	Private	apaul	07/02/2024, 12:27	Model Portfolio	🔻 Valid 🔻
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Amy Test Portfolio 0709	Balanced	Private	apaul	25/01/2024, 12:16	Model Portfolio	🔻 Valid 🔻
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Multiple views can be created or cloned through the List View Controls area.

View all lists through the dropdown:

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