

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

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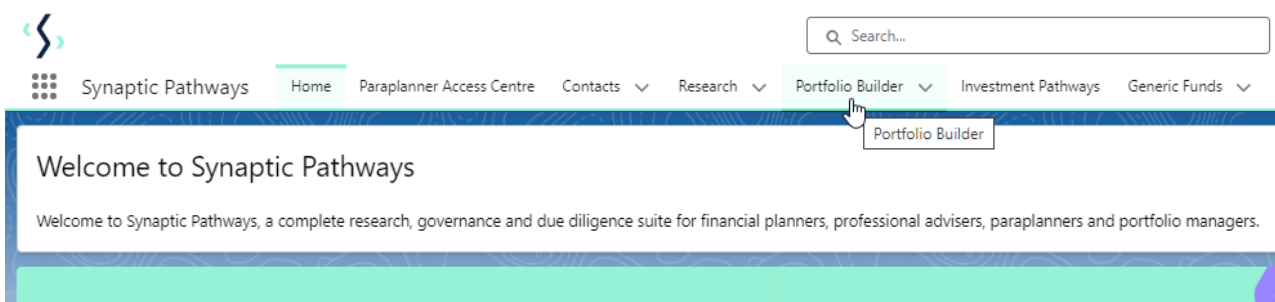
List Views can be configured within Synaptic Pathways. In this article, we will take you through cloning an existing view & creating multiple views to show the information you require.

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

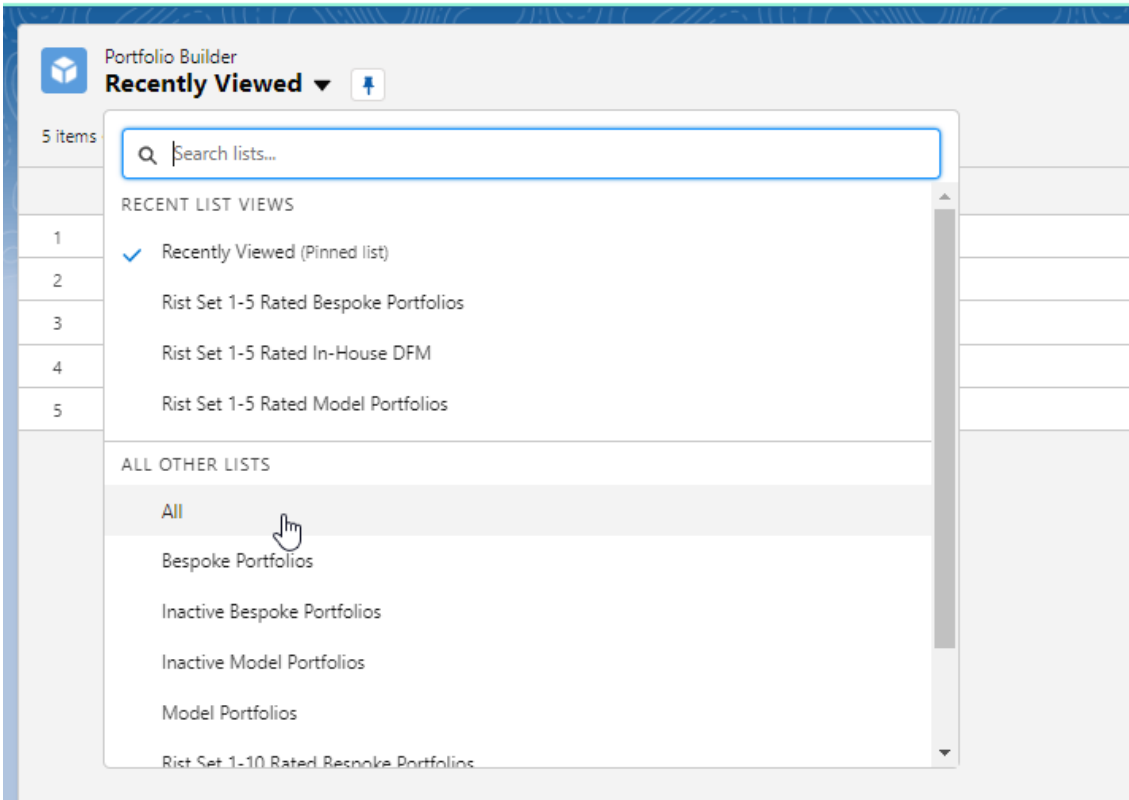
For example, If you have more than one licence in your company, you may want to set a view to show only your clients, configure the portfolio builder tab to show your portfolios or set the research tab to list all your research.

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

Navigate into the Portfolio Builder tab:



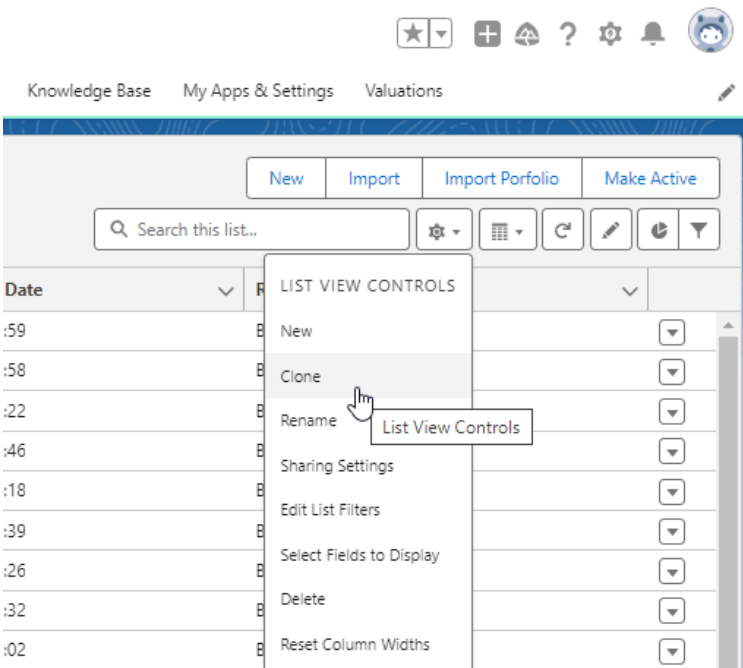
Once within the Portfolio Builder tab, click the down arrow next to **Recently Viewed** and select **All**



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

Clone List View

*List Name

*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 ⓘ

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

New Import Import Portfolio Make Active

Search this list.. [Settings] [Grid] [Refresh] [Edit] [Share] [Filter]

Record	Filters
Besp	Filter by Owner All portfolio builder Add Filter Remove All
Besp	
Besp	
Besp	
Besp	

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 Portfolio Make Active

Search this list.. [Settings] [Grid] [Refresh] [Edit] [Share] [Filter]

Filter by Owner

All portfolio builder

My portfolio builder

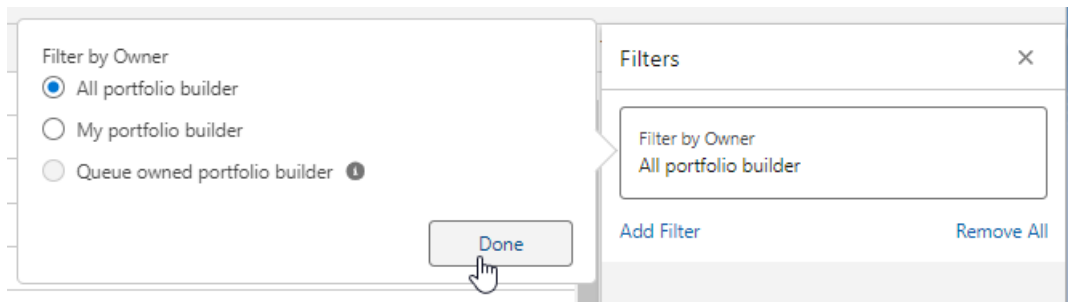
Queue owned portfolio builder ⓘ

Filters

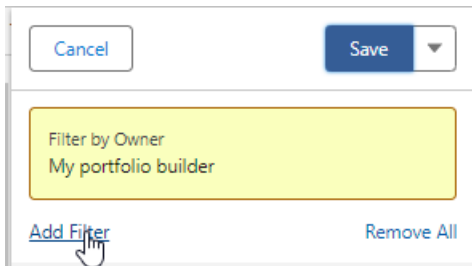
Filter by Owner
All portfolio builder

Add Filter Remove All

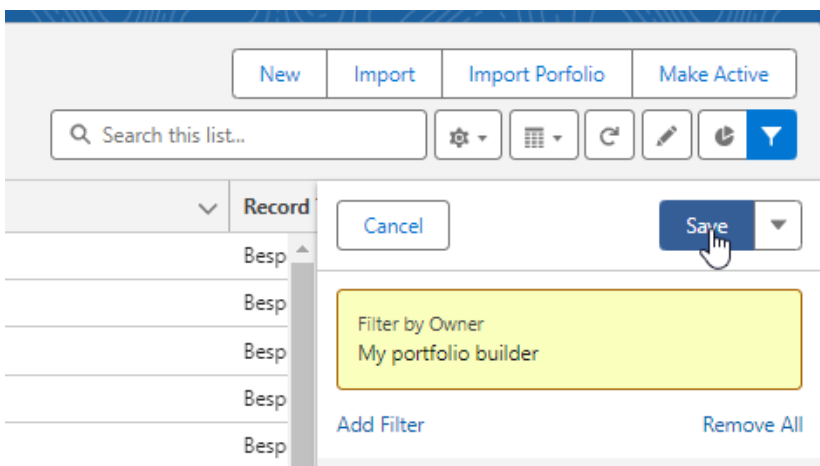
Done



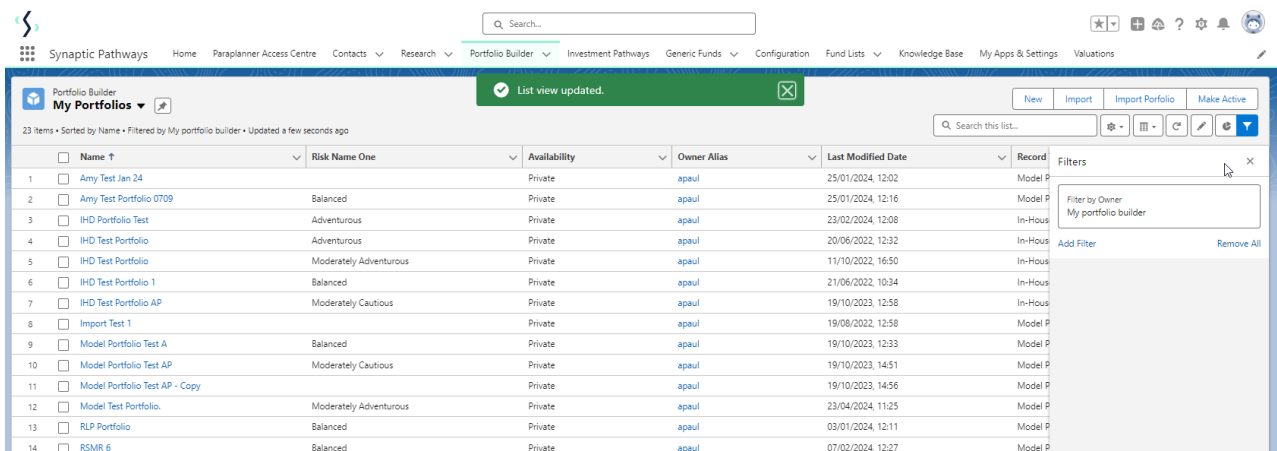
Add additional options through **Add Filter**



Click **Save**

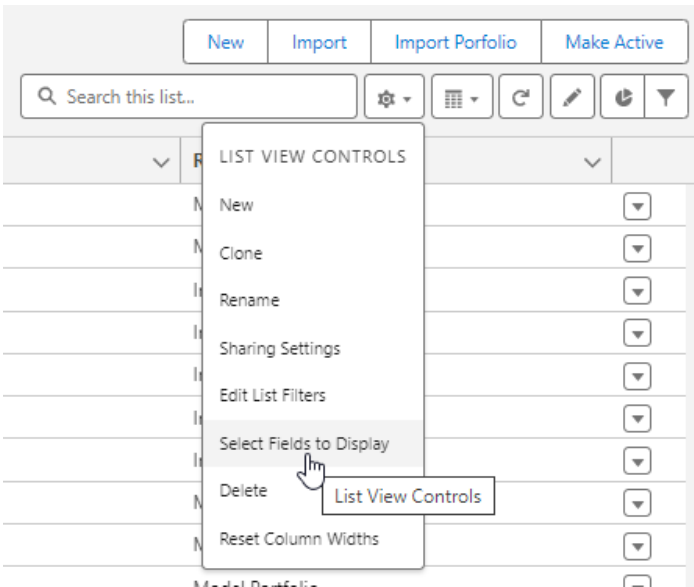


The view will now return all portfolios created by you.

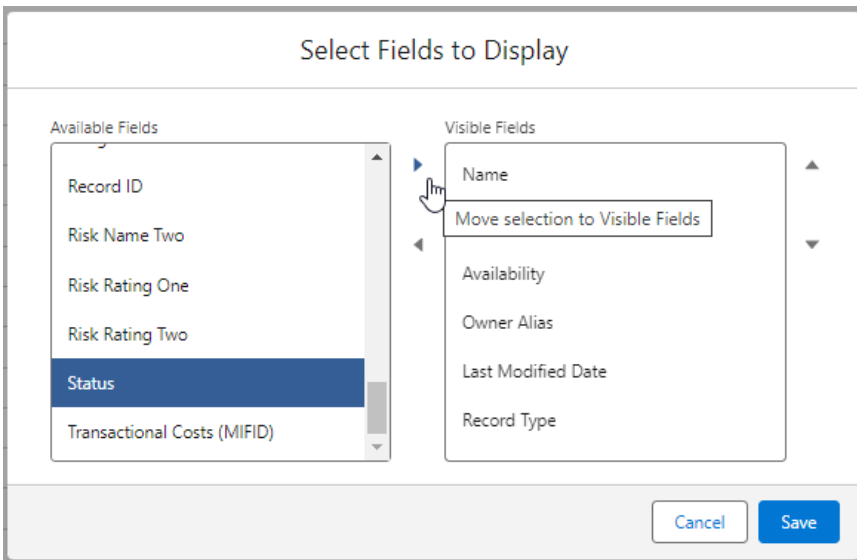


You are also able to include additional columns to the view through the **List View Controls** dropdown.

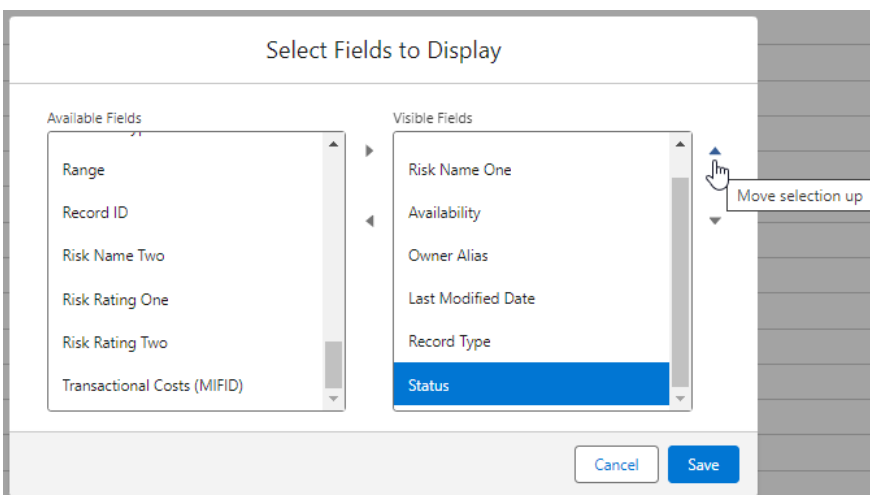
Click **Select Fields to Display**



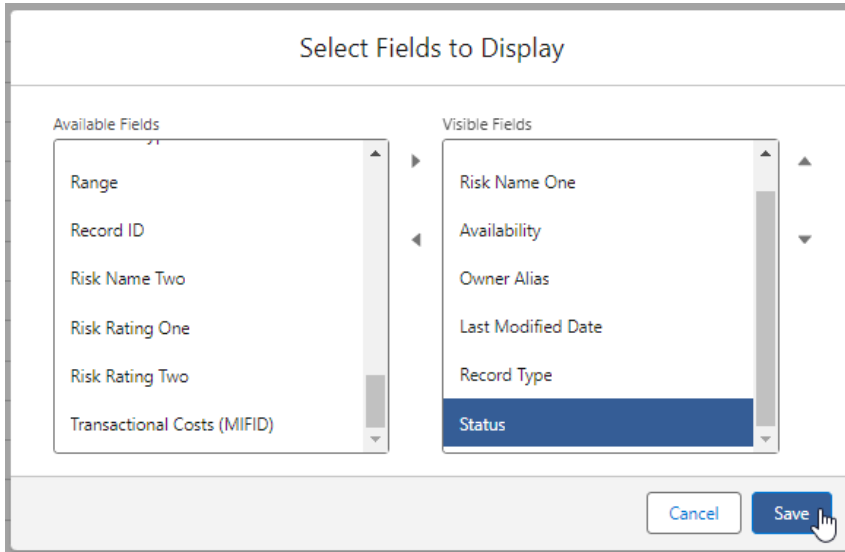
Scroll through the list of **Available fields**. Select an option and use the arrow to move the field over to **Visible Fields**



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:

Name	Risk Name One	Availability	Owner Alias	Last Modified Date	Record Type	Status
IHD Test Portfolio AP	Moderately Cautious	Private	apaul	19/10/2023, 12:58	In-House Discretionary	Valid
IHD Portfolio Test	Adventurous	Private	apaul	23/02/2024, 12:08	In-House Discretionary	Valid
IHD Test Portfolio	Adventurous	Private	apaul	20/06/2022, 12:32	In-House Discretionary	Valid
IHD Test Portfolio 1	Balanced	Private	apaul	21/06/2022, 10:34	In-House Discretionary	Valid
IHD Test Portfolio	Moderately Adventurous	Private	apaul	11/10/2022, 16:50	In-House Discretionary	Valid
Test InHouse Portfolio	Moderately Adventurous	Private	apaul	23/04/2024, 11:40	In-House Discretionary	Valid
Model Portfolio Test AP	Moderately Cautious	Private	apaul	19/10/2023, 14:51	Model Portfolio	Valid
Model Portfolio Test A	Balanced	Private	apaul	19/10/2023, 12:33	Model Portfolio	Valid
Model Portfolio Test AP - Copy		Private	apaul	19/10/2023, 14:56	Model Portfolio	Requires ...
RLP Portfolio	Balanced	Private	apaul	03/01/2024, 12:11	Model Portfolio	Valid
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
Test Feb24 Can	Balanced	Private	apaul	07/02/2024, 12:29	Model Portfolio	Valid
Test Portfolio Apr24	Moderately Cautious	Private	apaul	23/04/2024, 10:54	Model Portfolio	Valid
Amy Test Portfolio 0709	Balanced	Private	apaul	25/01/2024, 12:16	Model Portfolio	Valid
Test Portfolio 0923	Balanced	Private	apaul	19/09/2023, 15:34	Model Portfolio	Valid
Test Portfolio Oct22	Moderately Cautious	Private	apaul	11/10/2022, 15:49	Model Portfolio	Valid
Test Portfolio	Balanced	Private	apaul	08/07/2022, 12:13	Model Portfolio	Valid
Test Portfolio Import 1	Balanced	Private	apaul	21/06/2022, 13:02	Model Portfolio	Valid
Test Portfolio Import 2	Balanced	Private	apaul	21/06/2022, 13:02	Model Portfolio	Valid


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

Search lists...

Name	Availability
RECENT LIST VIEWS	
All	Private
✓ My Portfolios 	Private
Recently Viewed (Pinned list)	Private
Rist Set 1-5 Rated Bespoke Portfolios	Private
Rist Set 1-5 Rated In-House DFM	Private
Rist Set 1-5 Rated Model Portfolios	Private
ALL OTHER LISTS	
Bespoke Portfolios	Private
Inactive Bespoke Portfolios	Private
Inactive Model Portfolios	Private
Model Portfolios	Private
Rist Set 1-10 Rated Bespoke Portfolios	Private

Amy Test Portfolio 07/09 balanced