How do I configure the Research tab to only show my Research?

Last Modified on 15/05/2024 2:19 pm BST

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 Research tab.

Navigate into the Research tab:



Once within the Research 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 research rather than recently viewed. Note: This will include all Research completed within your company.

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

Click on List View Controls and Clone

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	1	New Change Owner	Import	Printable View
	Q Search this list		- m - C	• • • •
Activity Due Date	✓ Last Modified By ↑	LIST VIEW CONTROLS		~
18/10/2023	Amy Paulsen	New	A.I	v ^
16/12/2023	Amy Paulsen	Clone	AU.	•
22/12/2023	Amy Paulsen	Rename	View Controls	ך ד
29/12/2023	Amy Paulsen	Sharing Settings	AU	
24/11/2023	Amy Paulsen		QAE	•
	Amy Paulsen	Edit List Filters	DAU	•
	Amy Paulsen	Select Fields to Display	QAU	•
	Amy Paulsen	Delete	AU	•
	Amy Paulsen	Reset Column Widths	DAU	•
03/12/2023	Amy Paulsen	a0s4G00000an70	eOAF	Ţ

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

Clone	List View
*List Name	
Copy of All	
*List API Name 🕚	
Copy_of_All	
Who sees this list view?	
 Only I can see this list view 	
\bigcirc All users can see this list view \blacksquare	
○ Share list view with groups of users ●	
	Cancel

Clo	one List View
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Copy_of_All	
Who sees this list view?	
 Only I can see this list view 	
All users can see this list view 0	
 Share list view with groups of users 	
	Cancel

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

Save

Clone List View						
*List Name						
My Own Research						
*List API Name						
My_Own_Research						
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	0					
	Cancel					

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

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	a0s4K0000	005h4sxQAA		•		Filter by Owner			
	a0s4K0000	005ibLVQAY		•		All research			
	a0s4K0000	005ibwcQAA		•		Add Filter	N		Remove All
	a0s4G000	00fo4L7QAI		•			3		

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 Research

Configuration	Fund Lists 🗸 🗸	Knowledge Base	My Apps & Settings	Valuations
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	Q Search this list		Import Printable View
 Filter by Owner All research My research Queue owned research 	Done	Filters Filter by Owner All research Add Filter	× Remove All
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۱ ۵	Filter by Owner	
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Add additional options through Add Filter

Cancel	Save 🔻
Filter by Owner My research	
Add Filter	Remove All

Click Save

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	New	Change Owner	Import	Printable View
Q Search this	list			× × • • •
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)00fo4L7QAI	•	Add Filter		Remove All

The view will now return all research completed by you.

>	Synaptic Pathways Home Paraplanner A	Access Centre Con	Q Search		vestment Pathways	Generic Funds ↓ C	onfiguration Fund Lists	✓ Knowledg		? 🌣 🌲 🔇
item	Research My Own Research V P ms • Sorted by Last Modified By • Filtered by My research • U	pdated a few seconds a		t view updated.	(1:47) XXXXXX 400	\boxtimes	Q Search	New this list	Change Owner Import	Printable View
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	Susan Test Research	Susanna West	Comparison with Ex-ante	Test Description	18/10/2023	Amy Paulsen	a0s4G00000fo4L7QAI			
	Susanna Comparison w/ Ex-ante	Susanna West	Comparison with Ex-ante	Test Description Tex	t 16/12/2023	Amy Paulsen	a0s4G00000foEhIQAU		Filter by Owner	
	Susanna Comparison w/Ex-ante CIP	Susanna West	Comparison with Ex-ante	Test Description	22/12/2023	Amy Paulsen	a0s4G00000foGW2QAM		My research	
	Test Pension Switch	Susanna West	Switch	Test Description	29/12/2023	Amy Paulsen	a0s4G00000foGcAQAU		Add Filter	Remove
	Test Research for S	Susanna West	Comparison with Ex-ante	test	24/11/2023	Amy Paulsen	a0s4G00000gnUe1QAE	•		
	Income Analysis 11/9/2023, 11:41:51 AM	Susanna West	Comparison with Ex-ante	Test Description		Amy Paulsen	a0s4G00000gnZ0AQAU			
	Income Analysis 11/9/2023, 11:42:28 AM	Susanna West	Comparison with Ex-ante	Test Description		Amy Paulsen	a0s4G00000gnZ0BQAU			
	Income Analysis 11/9/2023, 11:42:11 AM	Susanna West	Comparison with Ex-ante	Test Description		Amy Paulsen	a0s4G00000gnZ0FQAU	•		
	Income Analysis 11/9/2023, 11:42:48 AM	Susanna West	Comparison with Ex-ante	Test Description		Amy Paulsen	a0s4G00000gnZ0GQAU			
)	Test Switch	Susanna West	Switch	Test Description	03/12/2023	Amy Paulsen	a0s4G00000gnZ0eQAE	•		
1	Test Switch	Susanna West	Ex-ante	Test Description		Amy Paulsen	a0s4G00000gnZ0jQAE			
	Test St Comp	Susanna West	Comparison with Ex-ante			Amy Paulsen	a0s4G00000gnZ1IQAU			
3	Test Illustration	Susanna West	Comparison with Ex-ante	Test Description	04/02/2024	Amy Paulsen	a0s4G00000gnZ2LQAU	•		

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

Click Select Fields to Display

		New	Change	Owner	Import	Printable View
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			List Filters		0AQAU	
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	Amy Paulsen	Rese	et Column W	idths	0GQAU	•
	Amy Paulsen		a0s4G	00000gnZ	0eQAE	•

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	
Is Regular Fee Percent	^	Illustration Name	^
Knowledge and Experience Statem		Move selection to Visible Fields	
Last Modified By Alias	•	Research Type	
Last Modified Date		Description	
One Off Fee Amount		Activity Due Date	
One Off Fee Percent		Last Modified By	
Over How Many Contributions	-		-

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.

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st	Available Fields		Visible Fields		Amy Pau
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Save

vailable Fields			Visible Fields		
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			Activity Due Date		
One Off Fee Amount			Last Modified By		
One Off Fee Percent			Record ID		
Over How Many Contributions			Last Modified Date		
Owner Alias	-			-	

The view has now been updated.

Each column can be sorted:

		Own Research 🔻 🖈								New Search this list	Change (Owner Import	Printable View
5 items • Sorted by Last Modified Date • Filtered by My research • Updated a few seconds ago													
		Illustration Name	V Client	 Research Type 	\sim	Description ~	Activity Due Date	✓ Last Modified By	\sim	Record ID	~	Last Modified Dat	<u> </u>
1		Comparison with Ex-Ante 1	Test Client	Comparison with Ex-ante		Test Description	31/10/2022	Amy Paulsen		a0s4K000006Vb5fQAC		14/05/2024, 11:13	Last Modified [
2		Switch April24.	Susanna West	Switch			11/05/2024	Amy Paulsen		a0sJ5000000CaWZIA0		23/04/2024, 14:22	
3		Test Switch April241	Susanna West	Switch				Amy Paulsen		a0sJ5000000CaSKIA0		22/04/2024, 13:21	
4		Switch Ap24	Susanna West	Switch				Amy Paulsen		a0sJ5000000CaSAIA0		22/04/2024, 13:19	
5		Test Ex-ante Comparison	Susanna West	Comparison with Ex-ante				Amy Paulsen		a0s4G00000gnZ3nQAE		17/04/2024, 15:16	
6		Comparison with Ex-ante TEST	Susanna West	Comparison with Ex-ante				Amy Paulsen		a0s4G00000gnZ6XQAU		17/04/2024, 15:14	
7		Switch April24	Susanna West	Switch		Test Description		Amy Paulsen		a0s4G00000gnZ6cQAE		08/04/2024, 12:27	
8		Test Switch 24	Les West	Switch				Amy Paulsen		a0s4G00000gnZ5eQAE		13/03/2024, 13:05	
9		Test Ex-Ante Feb 24	Susanna West	Comparison with Ex-ante				Amy Paulsen		a0s4G00000gnZ3xQAE		13/03/2024, 10:58	
10		Test Switch 1	Les West	Switch				Amy Paulsen		a0s4G00000gnZ5UQAU		12/03/2024, 15:22	
11		Test Comparison	Les West	Comparison with Ex-ante				Amy Paulsen		a0s4G00000gnZ5PQAU		12/03/2024, 15:18	
12		Test Pension Switch	Susanna West	Switch		Test Description	29/12/2023	Amy Paulsen		a0s4G00000foGcAQAU		29/02/2024, 10:44	
13		Feb24 Test Switch	Susanna West	Switch				Amy Paulsen		a0s4G00000gnZ4MQAU		27/02/2024, 10:37	
14		Feb24 Test Ex-ante	Susanna West	Comparison with Ex-ante				Amy Paulsen		a0s4G00000gnZ4NQAU		23/02/2024, 10:50	
15		Test Illustration	Susanna West	Switch		Test	10/01/2024	Amy Paulsen		a0s4G00000gnZ3EQAU		25/01/2024, 16:22	
16		test illustration	Susanna West	Switch		test		Amy Paulsen		a0s4G00000gnZ2VQAU		16/01/2024, 14:51	
17		Test Illustration	Susanna West	Comparison with Ex-ante		Test Description	04/02/2024	Amy Paulsen		a0s4G00000gnZ2LQAU		12/01/2024, 12:08	
		Test St Comp	Sucanna Weet	Comparison with Ev-ante				Amy Paulsen		a0x4G00000m71IO4U		01/12/2022 15:02	

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

View all lists through the dropdown:

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