

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

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

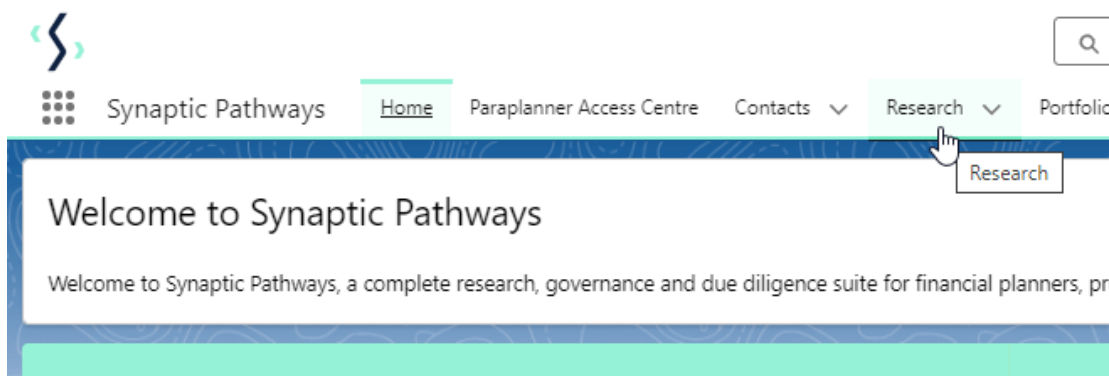
List Views can be configured within Synaptic Pathways. In this article, we will take you through cloning an existing view & creating multiple views to show the information you require.

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

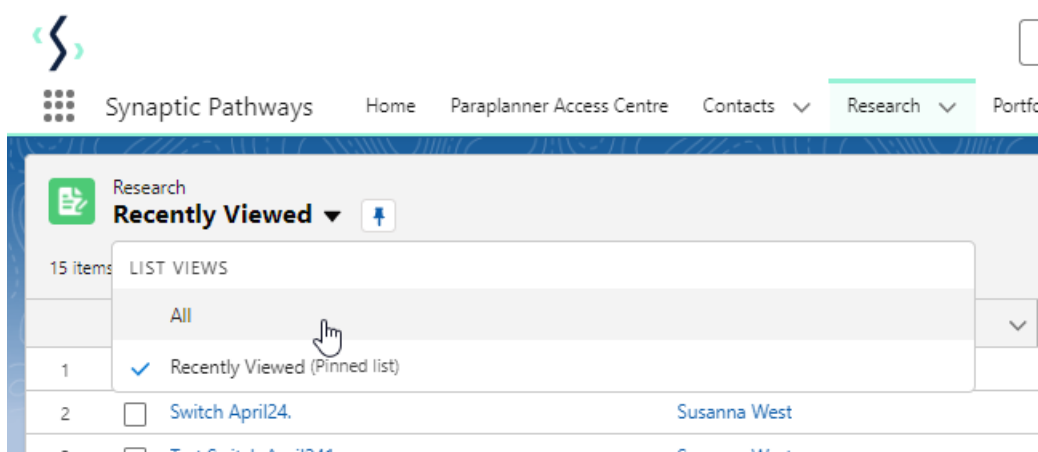
For example, If you have more than one licence in your company, you may want to set a view to show only your clients, configure the portfolio builder tab to show your portfolios or set the research tab to list all your research.

In this article, we will configure the Research tab.

Navigate into the Research tab:



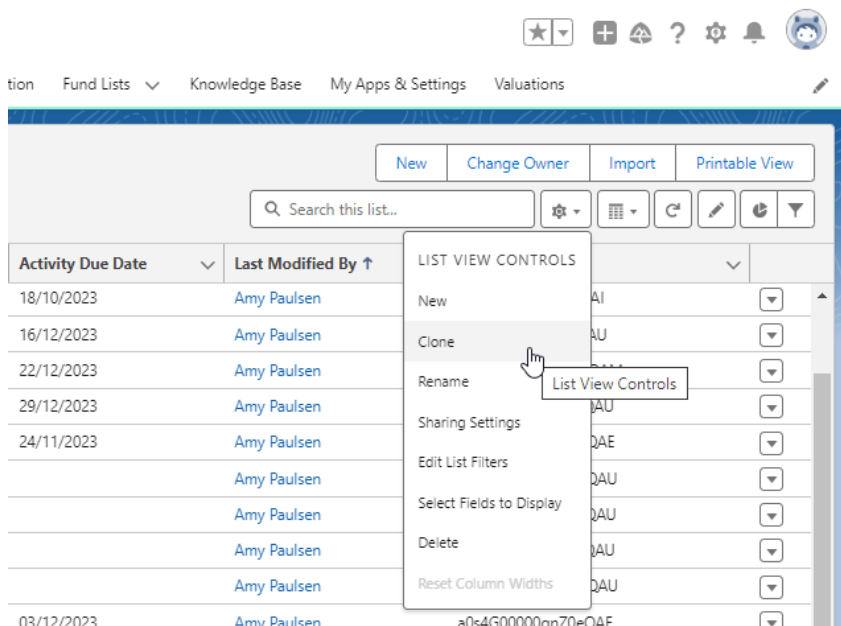
Once within the Research tab, click the down arrow next to **Recently Viewed** and select **All**



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**



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

All users can see this list view ⓘ

Share list view with groups of users ⓘ

Cancel Save

Clone List View

\*List Name  
My Own Research

\*List API Name ⓘ  
Copy\_of\_All

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?

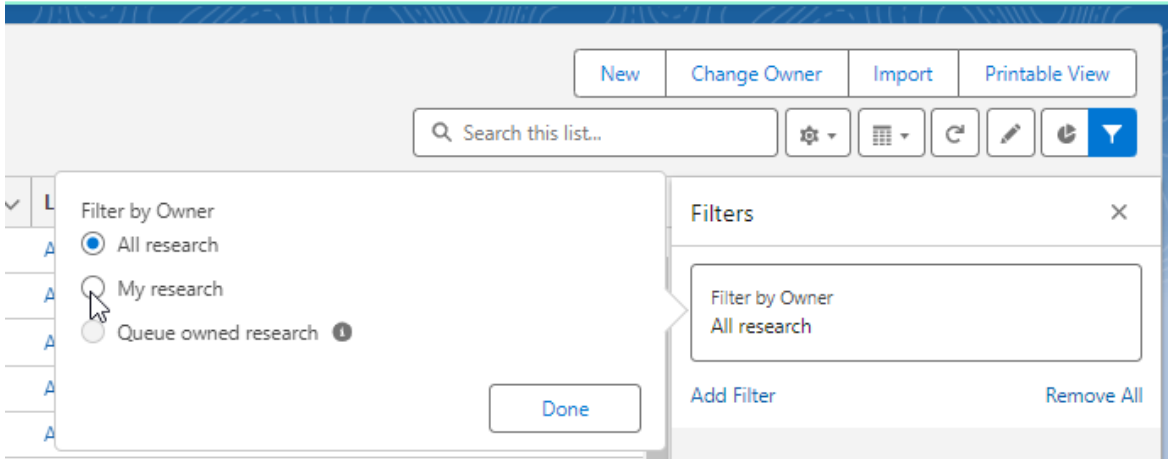
- Only I can see this list view
- All users can see this list view ⓘ
- Share list view with groups of users ⓘ

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

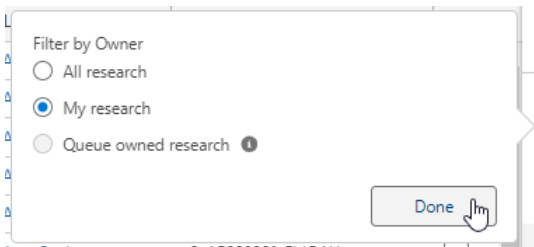
The screenshot shows a software interface with a navigation bar at the top containing icons for star, plus, shield, question mark, gear, bell, and a profile icon. Below the navigation bar are tabs for 'und Lists', 'Knowledge Base', 'My Apps & Settings', and 'Valuations'. The main content area displays a list view with a toolbar containing buttons for 'New', 'Change Owner', 'Import', and 'Printable View'. A search bar is present with the text 'Search this list...'. Below the search bar is a table with a 'Record ID' column and several rows of alphanumeric IDs. A yellow filter panel is open on the right side of the screen, titled 'Filters'. It contains a section 'Filter by Owner' with 'All research' selected. At the bottom of the filter panel are buttons for 'Add Filter' and 'Remove All'.

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

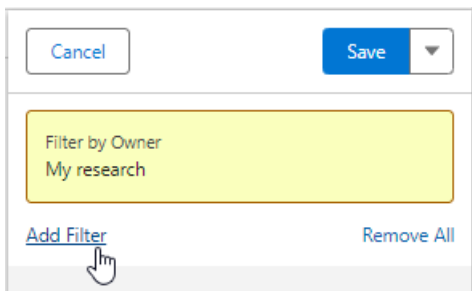
We will select **My Research**



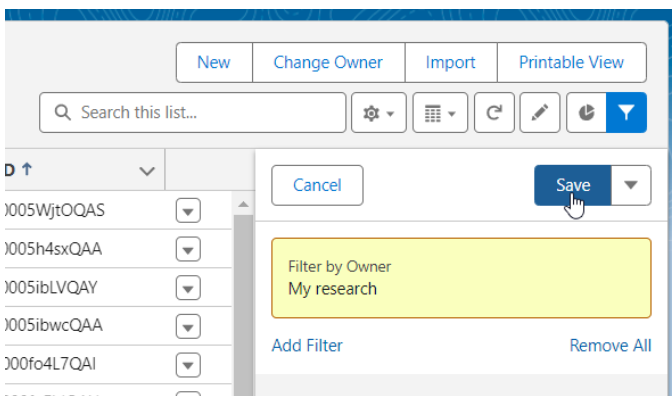
### Done



Add additional options through **Add Filter**



Click **Save**



The view will now return all research completed by you.

Research  
My Own Research

36 items • Sorted by Last Modified By • Filtered by My research • Updated a few seconds ago

<input type="checkbox"/>	Illustration Name	Client	Research Type	Description	Activity Du...	Last Modi...	Record ID
<input type="checkbox"/>	Susan Test Research	Susanna West	Comparison with Ex-ante	Test Description	18/10/2023	Amy Paulsen	a0s4G00000fo4L7QAI
<input type="checkbox"/>	Susanna Comparison w/ Ex-ante	Susanna West	Comparison with Ex-ante	Test Description Text	16/12/2023	Amy Paulsen	a0s4G00000foEM1QAU
<input type="checkbox"/>	Susanna Comparison w/Ex-ante CIP	Susanna West	Comparison with Ex-ante	Test Description	22/12/2023	Amy Paulsen	a0s4G00000foGW2QAM
<input type="checkbox"/>	Test Pension Switch	Susanna West	Switch	Test Description	29/12/2023	Amy Paulsen	a0s4G00000foGcAQAU
<input type="checkbox"/>	Test Research for S	Susanna West	Comparison with Ex-ante	test	24/11/2023	Amy Paulsen	a0s4G00000gnUe1QAE
<input type="checkbox"/>	Income Analysis   11/9/2023, 11:41:51 AM	Susanna West	Comparison with Ex-ante	Test Description		Amy Paulsen	a0s4G00000gnZ0AQAU
<input type="checkbox"/>	Income Analysis   11/9/2023, 11:42:28 AM	Susanna West	Comparison with Ex-ante	Test Description		Amy Paulsen	a0s4G00000gnZ0BQAU
<input type="checkbox"/>	Income Analysis   11/9/2023, 11:42:11 AM	Susanna West	Comparison with Ex-ante	Test Description		Amy Paulsen	a0s4G00000gnZ0FQAU
<input type="checkbox"/>	Income Analysis   11/9/2023, 11:42:48 AM	Susanna West	Comparison with Ex-ante	Test Description		Amy Paulsen	a0s4G00000gnZ0GQAU
<input type="checkbox"/>	Test Switch	Susanna West	Switch	Test Description	03/12/2023	Amy Paulsen	a0s4G00000gnZ0eQAE
<input type="checkbox"/>	Test Switch	Susanna West	Ex-ante	Test Description		Amy Paulsen	a0s4G00000gnZ0jQAE
<input type="checkbox"/>	Test St Comp	Susanna West	Comparison with Ex-ante			Amy Paulsen	a0s4G00000gnZ11QAU
<input type="checkbox"/>	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**

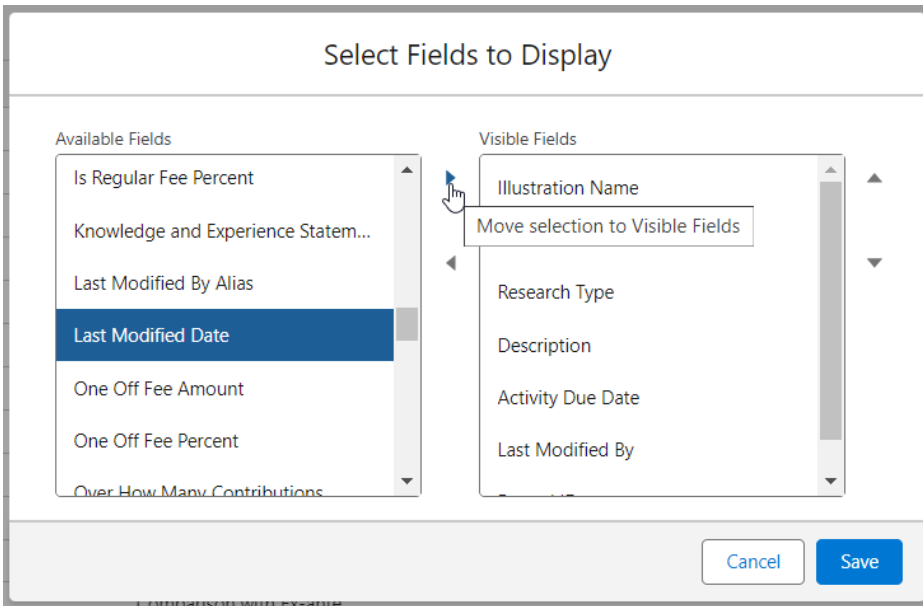
New Change Owner Import Printable View

Search this list...

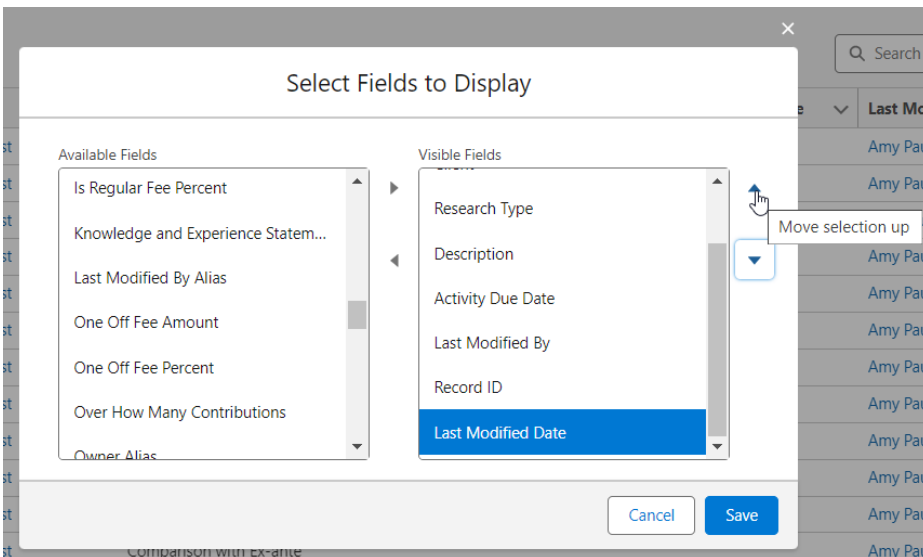
LIST VIEW CONTROLS

- New
- Clone
- Rename
- Sharing Settings
- Edit List Filters
- Select Fields to Display
- Delete
- Reset Column Widths

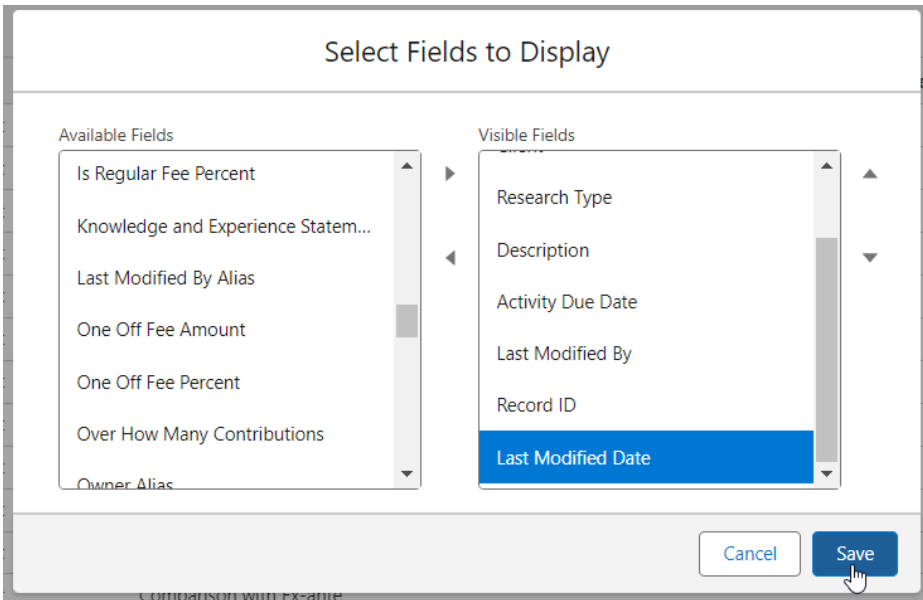
Scroll through the list of **Available fields**. Select an option and use the arrow to move the field over to **Visible Fields**



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:

	Illustration Name	Client	Research Type	Description	Activity Due Date	Last Modified By	Record ID	Last Modified Date
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
2	Switch April24	Susanna West	Switch		11/05/2024	Amy Paulsen	a0s15000000CaWZIA0	23/04/2024, 14:22
3	Test Switch April241	Susanna West	Switch			Amy Paulsen	a0s15000000CaSKIA0	22/04/2024, 13:21
4	Switch Ap24	Susanna West	Switch			Amy Paulsen	a0s15000000CaSAIA0	22/04/2024, 13:19
5	Test Ex-ante Comparison	Susanna West	Comparison with Ex-ante			Amy Paulsen	a0s4G000000gnZ3hQAE	17/04/2024, 15:16
6	Comparison with Ex-ante TEST	Susanna West	Comparison with Ex-ante			Amy Paulsen	a0s4G000000gnZ6xQAU	17/04/2024, 15:14
7	Switch April24	Susanna West	Switch	Test Description		Amy Paulsen	a0s4G000000gnZ6cQAE	08/04/2024, 12:27
8	Test Switch 24	Les West	Switch			Amy Paulsen	a0s4G000000gnZ5eQAE	13/03/2024, 13:05
9	Test Ex-Ante Feb 24	Susanna West	Comparison with Ex-ante			Amy Paulsen	a0s4G000000gnZ3vQAE	13/03/2024, 10:58
10	Test Switch 1	Les West	Switch			Amy Paulsen	a0s4G000000gnZ5UQAU	12/03/2024, 15:22
11	Test Comparison	Les West	Comparison with Ex-ante			Amy Paulsen	a0s4G000000gnZ5PQAU	12/03/2024, 15:18
12	Test Pension Switch	Susanna West	Switch	Test Description	29/12/2023	Amy Paulsen	a0s4G000000f0GcAQAU	29/02/2024, 10:44
13	Feb24 Test Switch	Susanna West	Switch			Amy Paulsen	a0s4G000000gnZ4MQAU	27/02/2024, 10:37
14	Feb24 Test Ex-ante	Susanna West	Comparison with Ex-ante			Amy Paulsen	a0s4G000000gnZ4NQU	23/02/2024, 10:50
15	Test Illustration	Susanna West	Switch	Test	10/01/2024	Amy Paulsen	a0s4G000000gnZ3EQAU	25/01/2024, 16:22
16	test illustration	Susanna West	Switch	test		Amy Paulsen	a0s4G000000gnZ2VQAU	16/01/2024, 14:51
17	Test Illustration	Susanna West	Comparison with Ex-ante	Test Description	04/02/2024	Amy Paulsen	a0s4G000000gnZ2LQAU	12/01/2024, 12:08

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

View all lists through the dropdown:

