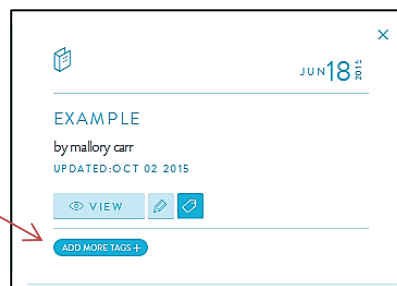


If you work with many portfolios on the Innovation Portal, here is a solution to how to organize them so you can manage how and when you see them on your dashboard.

To set a tag to a given portfolio (or view current tags of a portfolio), First, click the TAG icon



To add a TAG, click the "ADD MORE TAGS" button.

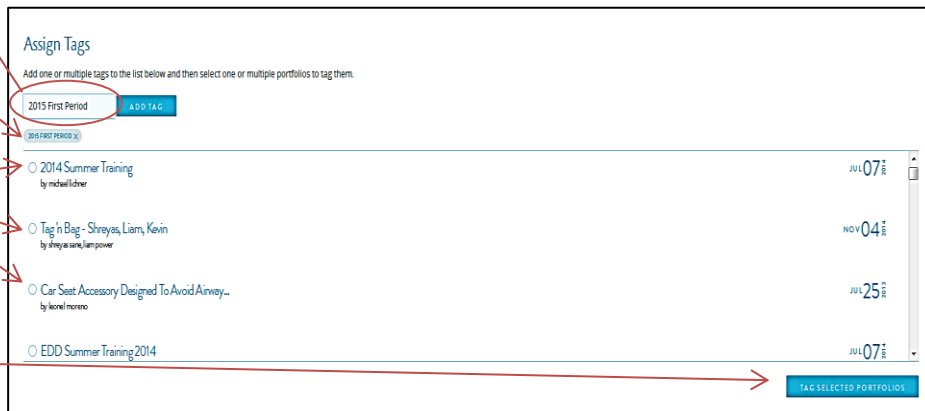


Enter any descriptor / identifier that you would like such as "2015 First Period"

Click the blue "ADD TAGS" button so the tag shows here

You can choose to add this same identifier to more portfolios at the same time

When you have the portfolios selected that you want to have this identifier click "Tag Selected Portfolios"



JUN 18 2015

EXAMPLE

by mallery carr
UPDATED: OCT 02 2015

VIEW

2015 FIRST PERIOD X HELAT RELATED PROJECT X

ADD MORE TAGS +

To check your work, click the TAG icon to show the tags assigned to a portfolio

A portfolio can have many tags if necessary in order to be able to filter and find it quicker

To remove a tag from a portfolio just click the "X"

You can chose to FILTER what portfolios you see displayed on your screen

- By Owner: Only shows the ones you of which you are an owner
- By Collaborator: Only shows the ones you are designated as a collaborator
- By Viewer: Only those which you are designated a viewer.
- **By Tags:** Shown here you can choose filter by TAGS and then which TAG you created that you want to use as the filter

CREATE NEW PORTFOLIO

FILTER BY: OWNER | COLLABORATOR | VIEWER | TAGS X

FILTER TAG

2015 First Period
2016
Health Related Project

6 TOTAL

JUL 07 2015