# **Amend Portfolio Group (W5)**

This version is superseded. Click here to view the latest guide.

#### **PURPOSE**

This document shows how to amend and maintain portfolio group.

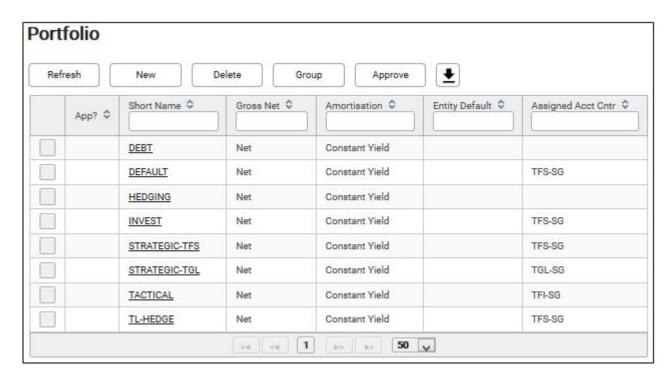
#### **WHY IS THIS IMPORTANT?**

This allows maintaining portfolio group name when changes are required.

#### **PROCEDURE**

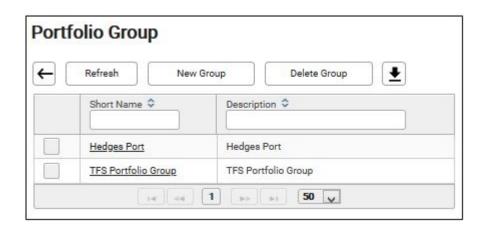


1. Select Set Up > Risk > Portfolio.



2. Click Group. The Portfolio Group screen will be displayed.

3. Click the Short Name of the Group being changed. In this example, TFS Portfolio Group will be changed.



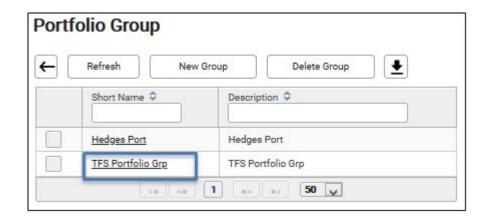
4. The Amend Portfolio Group screen will be displayed.



5. In this example, the short name, long name and description will be changed.



6. Click Save. The name displayed will be changed.



# **FREQUENTLY ASKED QUESTIONS**

## **RELATED INFORMATION**

Create Portfolio Group and Assign Members

**Duplicate Portfolio Group** 

Delete Portfolio Group

## **CHANGE HISTORY**

Date	Ву	Changes
2 <mark>1</mark> -Jul-2017	Clarissa	Created.
15-Nov-2019	Lyra	Updated Screenshots.