Amend Portfolio Group (W5)

This version is superseded.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

PURPOSE

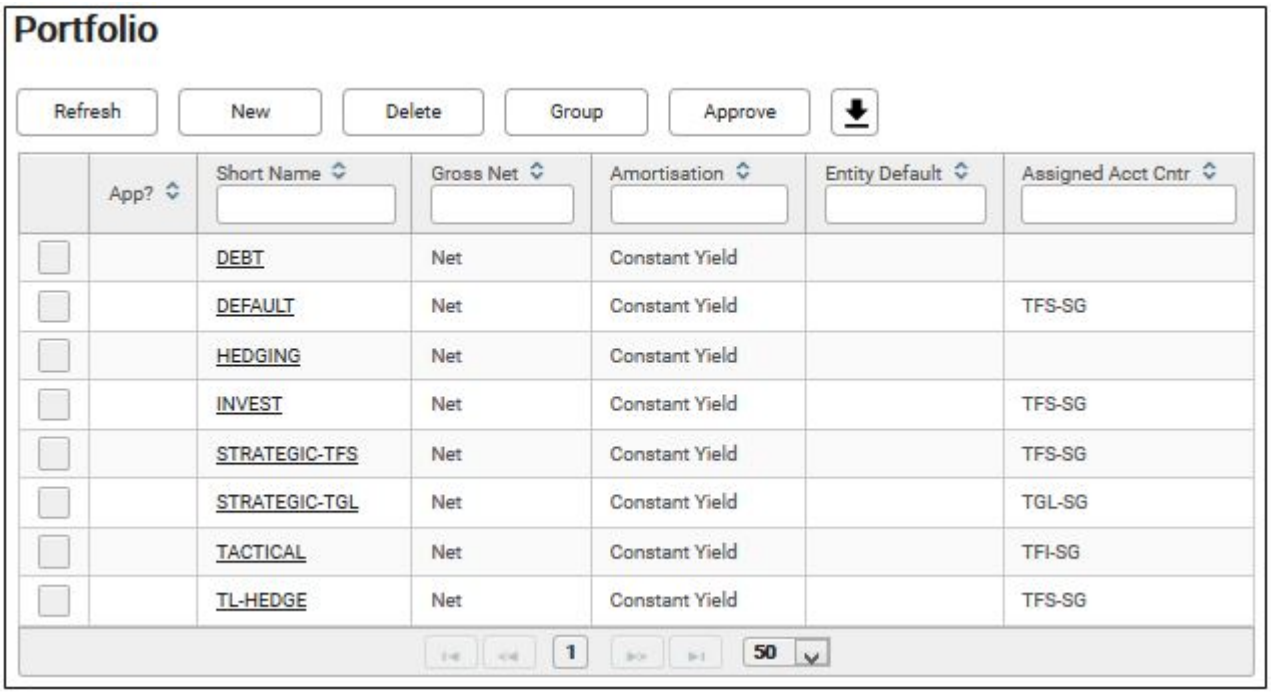
This document shows how to amend and maintain portfolio group.

WHY IS THIS IMPORTANT?

This allows maintaining portfolio group name when changes are required.

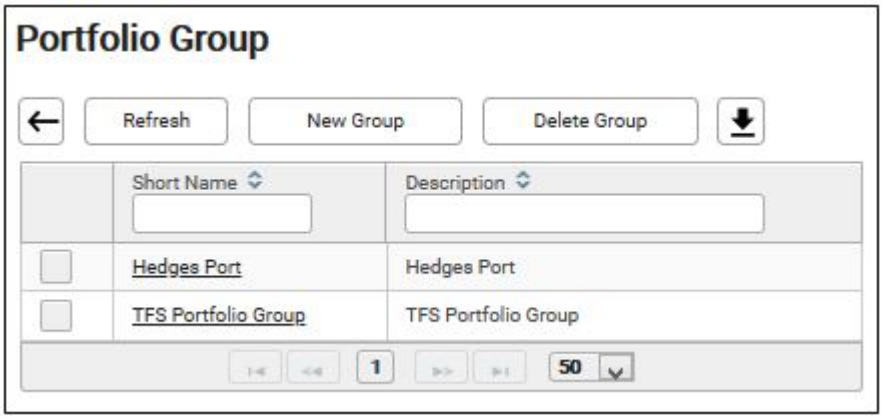
PROCEDURE

1. Select Set Up > Risk > Portfolio.



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

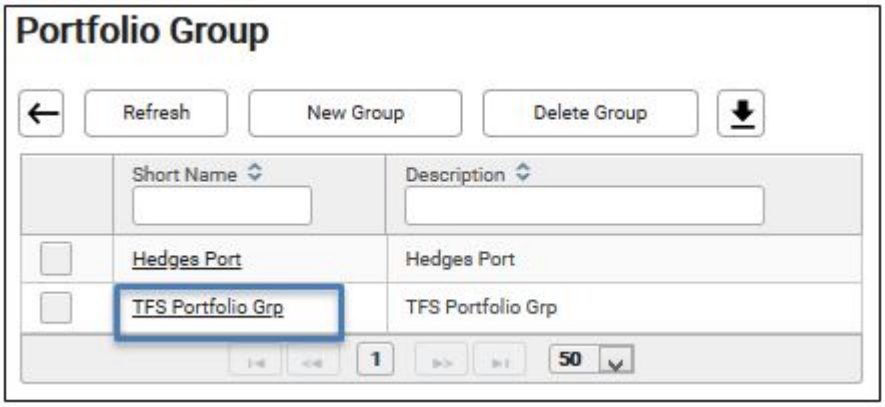
3. Click the Short Name of the Group being changed. In this example, TFS Portfolio Group will be changed.



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	By	Changes
21-Jul-2017	Clarissa	Created.
15-Nov-2019	Lyra	Updated Screenshots.