

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[This version is superseded.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.

Portfolio						
Refresh New Delete Group Approve 						
	App? 	Short Name 	Gross Net 	Amortisation 	Entity Default 	Assigned Acct Cntr 
<input type="checkbox"/>		<u>DEBT</u>	Net	Constant Yield		
<input type="checkbox"/>		<u>DEFAULT</u>	Net	Constant Yield		TFS-SG
<input type="checkbox"/>		<u>HEDGING</u>	Net	Constant Yield		
<input type="checkbox"/>		<u>INVEST</u>	Net	Constant Yield		TFS-SG
<input type="checkbox"/>		<u>STRATEGIC-TFS</u>	Net	Constant Yield		TFS-SG
<input type="checkbox"/>		<u>STRATEGIC-TGL</u>	Net	Constant Yield		TGL-SG
<input type="checkbox"/>		<u>TACTICAL</u>	Net	Constant Yield		TFI-SG
<input type="checkbox"/>		<u>TL-HEDGE</u>	Net	Constant Yield		TFS-SG
1 50 						

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.

The screenshot shows a web interface titled "Portfolio Group". At the top, there are four buttons: a back arrow, "Refresh", "New Group", and "Delete Group", followed by a download icon. Below these is a table with two columns: "Short Name" and "Description". The table contains two rows: "Hedges Port" and "TFS Portfolio Group". The "TFS Portfolio Group" row is highlighted. At the bottom of the table, there is a pagination bar showing "1" of "50" items.

	Short Name	Description
<input type="checkbox"/>	Hedges Port	Hedges Port
<input type="checkbox"/>	TFS Portfolio Group	TFS Portfolio Group

4. The Amend Portfolio Group screen will be displayed.

The screenshot shows a web interface titled "Amend Portfolio Group". At the top, there are four buttons: a back arrow, "Save", "Duplicate", and "Assign Member". Below these are three input fields: "Short Name*", "Long Name", and "Description". Each field contains the text "TFS Portfolio Group".

Short Name*	TFS Portfolio Group
Long Name	TFS Portfolio Group
Description	TFS Portfolio Group

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

The screenshot shows the same "Amend Portfolio Group" interface as before, but the input fields now contain "TFS Portfolio Grp" instead of "TFS Portfolio Group".

Short Name*	TFS Portfolio Grp
Long Name	TFS Portfolio Grp
Description	TFS Portfolio Grp

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

Portfolio Group

←
Refresh
New Group
Delete Group
↓

	Short Name ↕	Description ↕
<input type="checkbox"/>	Hedges Port	Hedges Port
<input type="checkbox"/>	TFS Portfolio Grp	TFS Portfolio Grp

1
50

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.