

Amend Portfolio Group (W5)

[This version is superseded. Click here to view the latest guide.](#)

PURPOSE

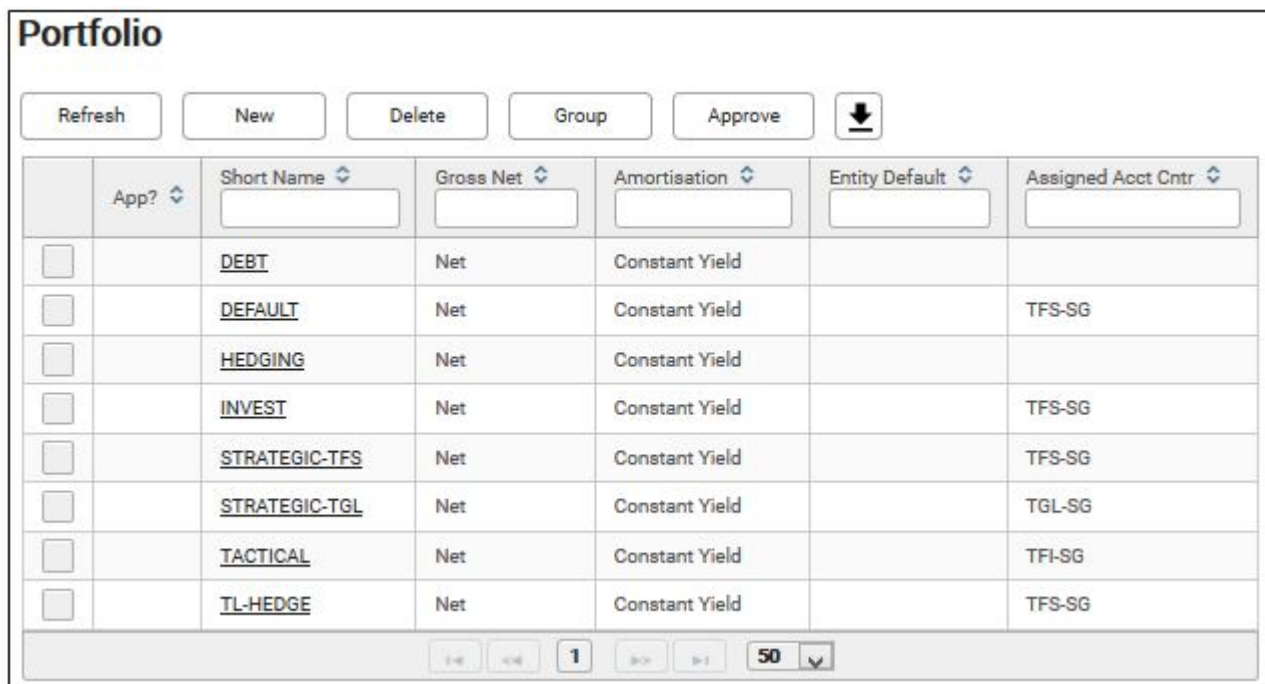
This document shows how to amend and maintain portfolio group.

WHY IS THIS IMPORTANT?

This allows maintaining portfolio group name when changes are required.

PROCEDURE

1. Select Set Up > Risk > Portfolio.



The screenshot shows the 'Portfolio' screen with a table of portfolio groups. The table has columns for App?, Short Name, Gross Net, Amortisation, Entity Default, and Assigned Acct Cntr. The rows list various portfolio groups like DEBT, DEFAULT, HEDGING, INVEST, STRATEGIC-TFS, STRATEGIC-TGL, TACTICAL, and TL-HEDGE. The bottom of the screen shows a pagination bar with '1' and '50'.

	App? ↕	Short Name ↕	Gross Net ↕	Amortisation ↕	Entity Default ↕	Assigned Acct Cntr ↕
<input type="checkbox"/>		DEBT	Net	Constant Yield		
<input type="checkbox"/>		DEFAULT	Net	Constant Yield		TFS-SG
<input type="checkbox"/>		HEDGING	Net	Constant Yield		
<input type="checkbox"/>		INVEST	Net	Constant Yield		TFS-SG
<input type="checkbox"/>		STRATEGIC-TFS	Net	Constant Yield		TFS-SG
<input type="checkbox"/>		STRATEGIC-TGL	Net	Constant Yield		TGL-SG
<input type="checkbox"/>		TACTICAL	Net	Constant Yield		TFI-SG
<input type="checkbox"/>		TL-HEDGE	Net	Constant Yield		TFS-SG

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.

Portfolio Group

	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.

Amend Portfolio Group

Short Name*

Long Name

Description

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

Amend Portfolio Group

Short Name*

Long Name

Description

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.