Amend Portfolio Group

See previous W5 version guide

PURPOSE

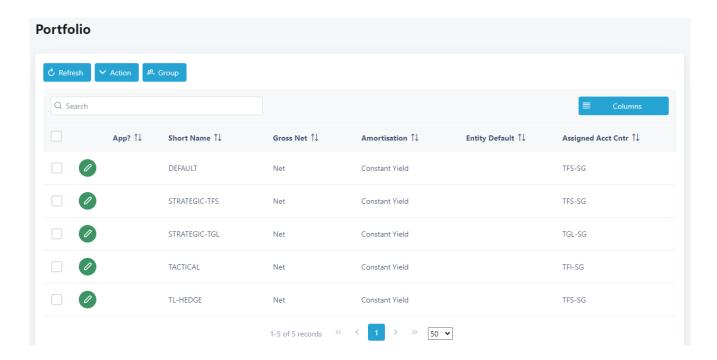
This document shows how to amend and maintain portfolio group.

WHY IS THIS IMPORTANT?

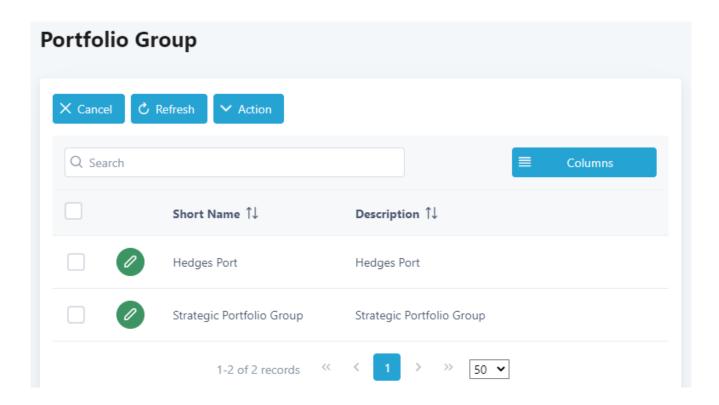
This allows maintaining portfolio group name when changes are required.

PROCEDURE

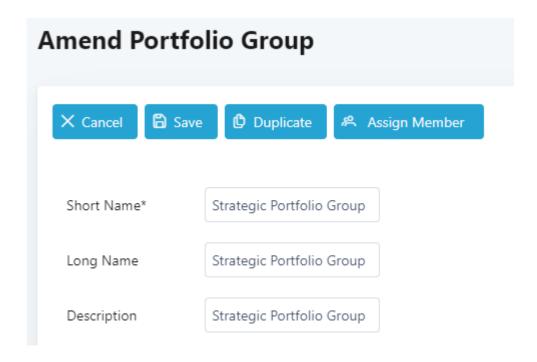
1. Select Set Up > Risk > Portfolio.



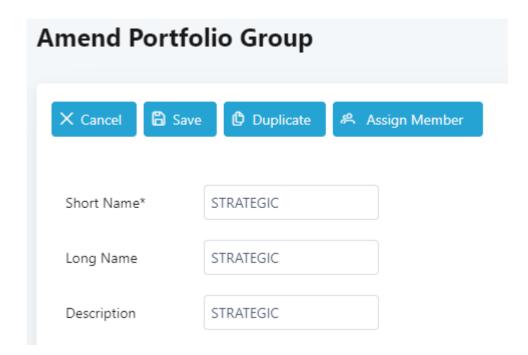
- 2. Click Group. The Portfolio Group screen will be displayed.
- 3. Click the Edit button of the portfolio group to amend. In this example, Strategic Portfolio Group.



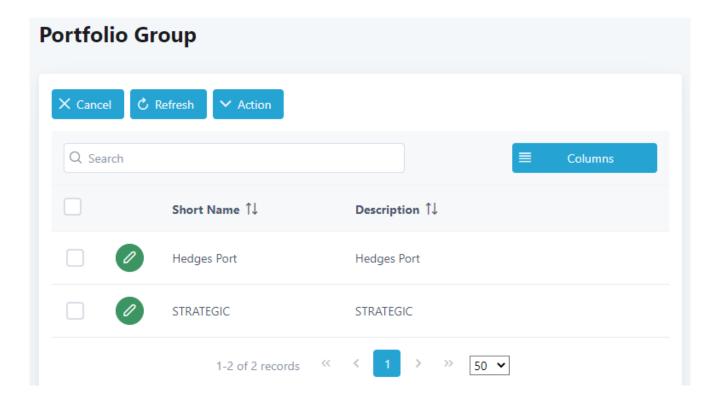
4. The Amend Portfolio Group screen will be displayed.



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



6. Click Save. The portfolio group is now amended.



FREQUENTLY ASKED QUESTIONS

RELATED INFORMATION

Create Portfolio Group and Assign Members

<u>Duplicate Portfolio Group</u>

Delete Portfolio Group

CHANGE HISTORY

Date	Ву	Changes
21-Jul-2017	Clarissa	Created.
15-Nov-2019	Lуга	Updated screenshots.
13-Маг-2023	TS	Updated to W6 instructions and screenshots.