Create Portfolio Group and Assign Member

See previous W5 version guide

PURPOSE

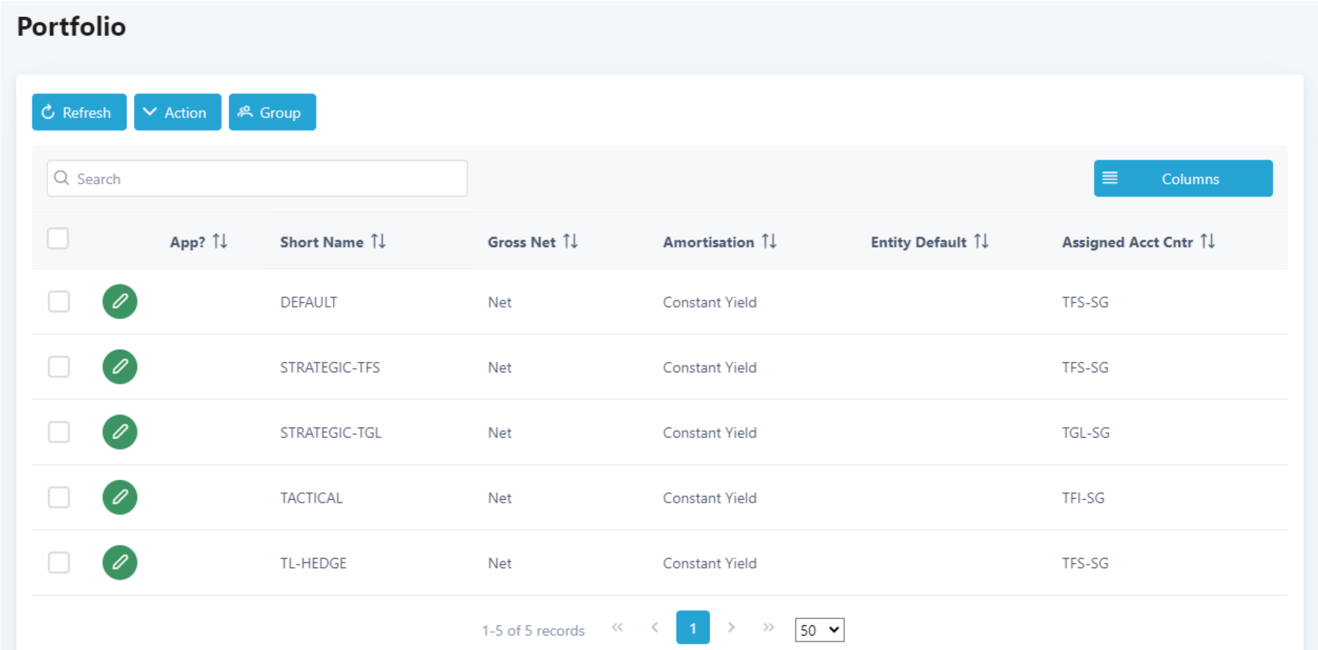
This document shows how to create portfolio group and how to assign members in that group.

WHY IS THIS IMPORTANT?

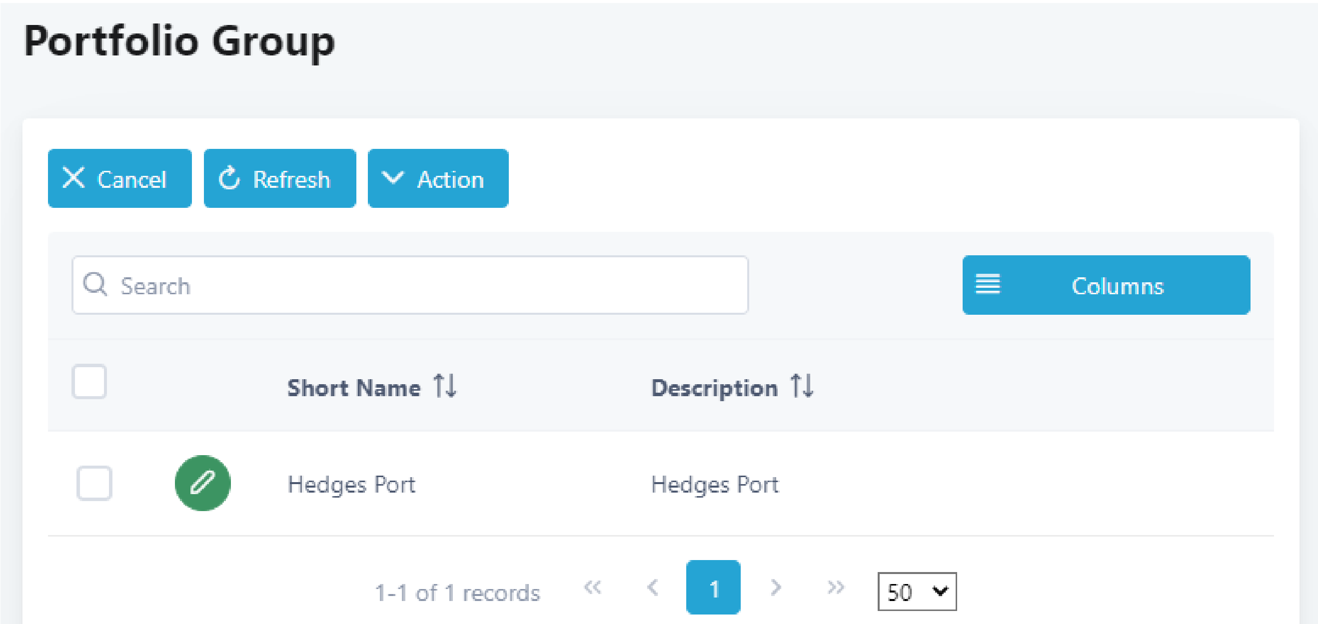
This allows grouping of portfolios for reporting purposes.

PROCEDURE

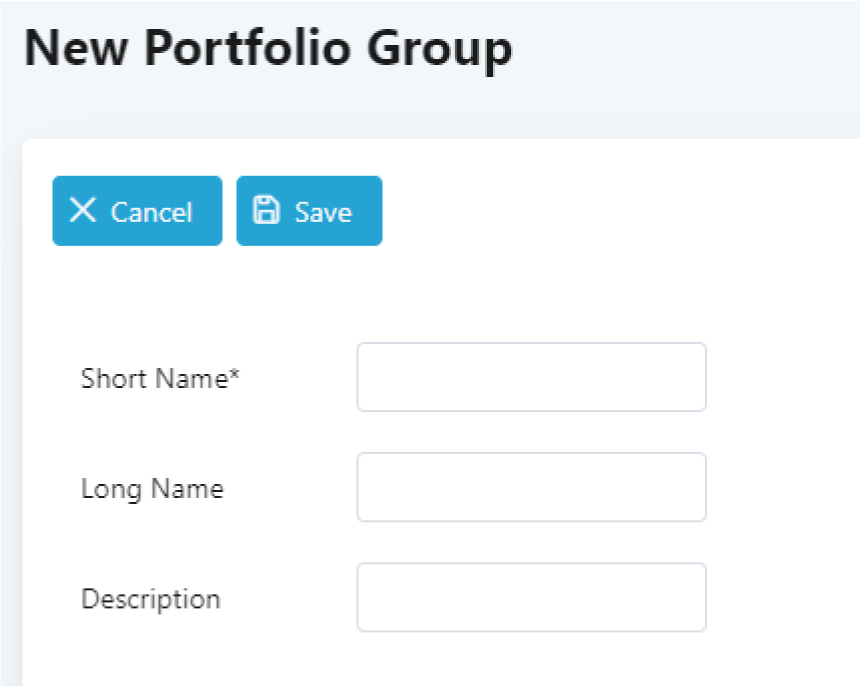
1. Select Set Up > Risk > Portfolio.



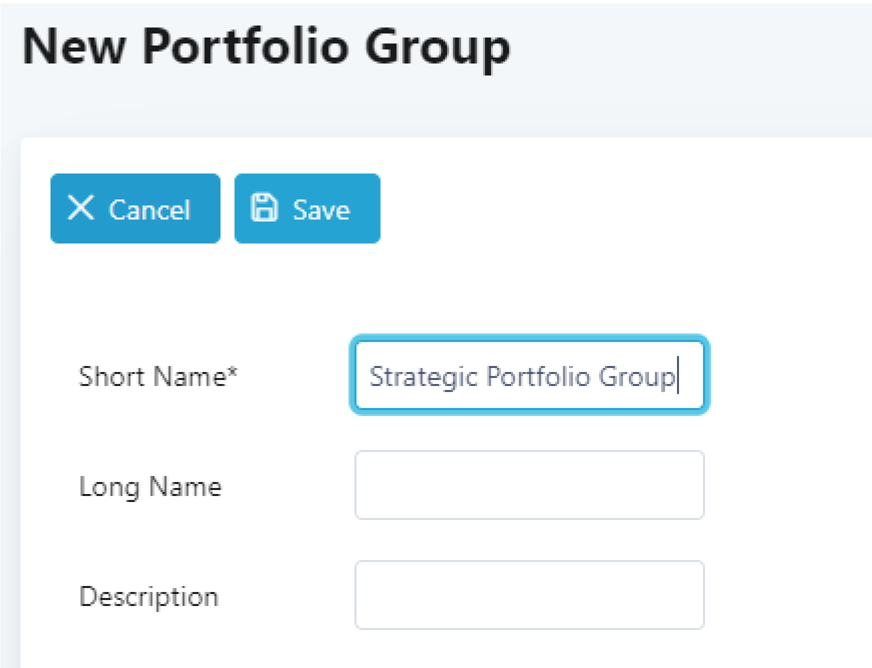
2. Click Group. The Portfolio Group screen will be displayed.



3. Click on Action and select New Group. The New Portfolio Group screen will be displayed.



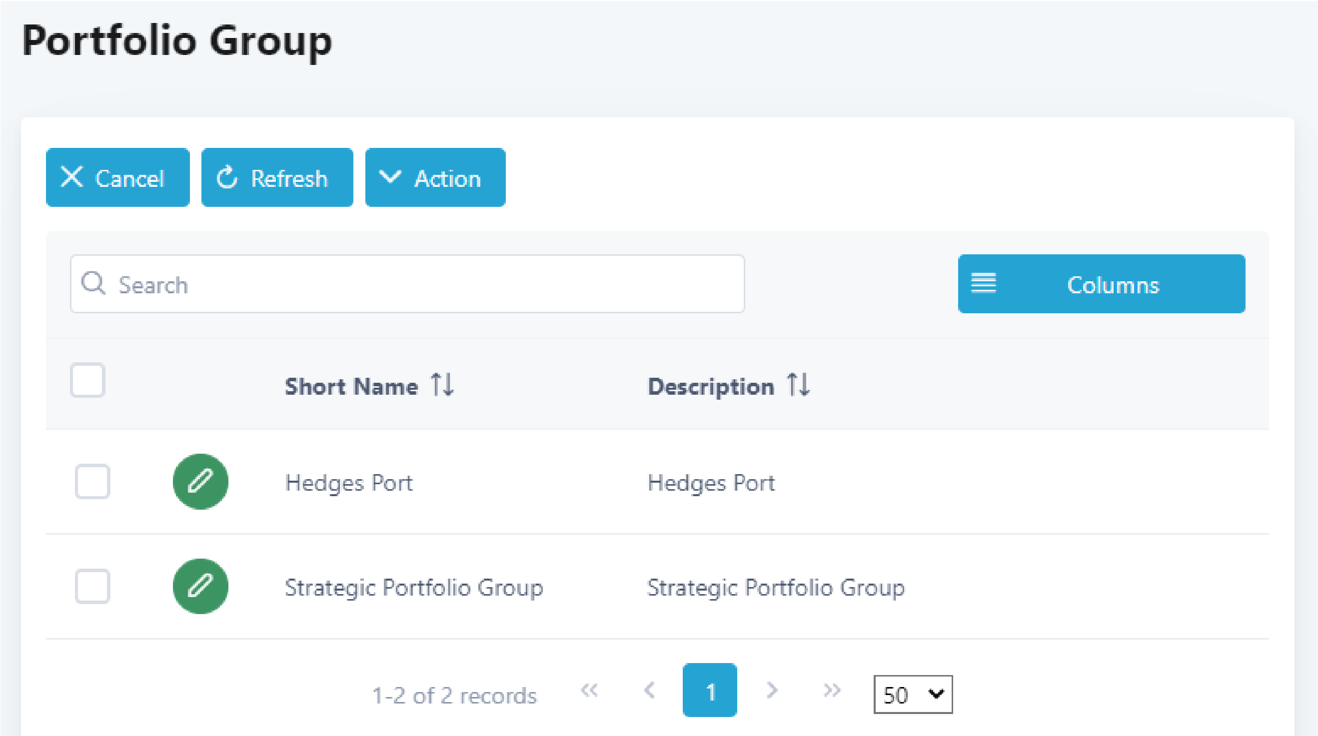
4. Type the Short name of the group being created. You may also input a Long Name and Description. If these fields are left blank, system will default to the same as Short Name. In this example, we will just fill out the Short Name.



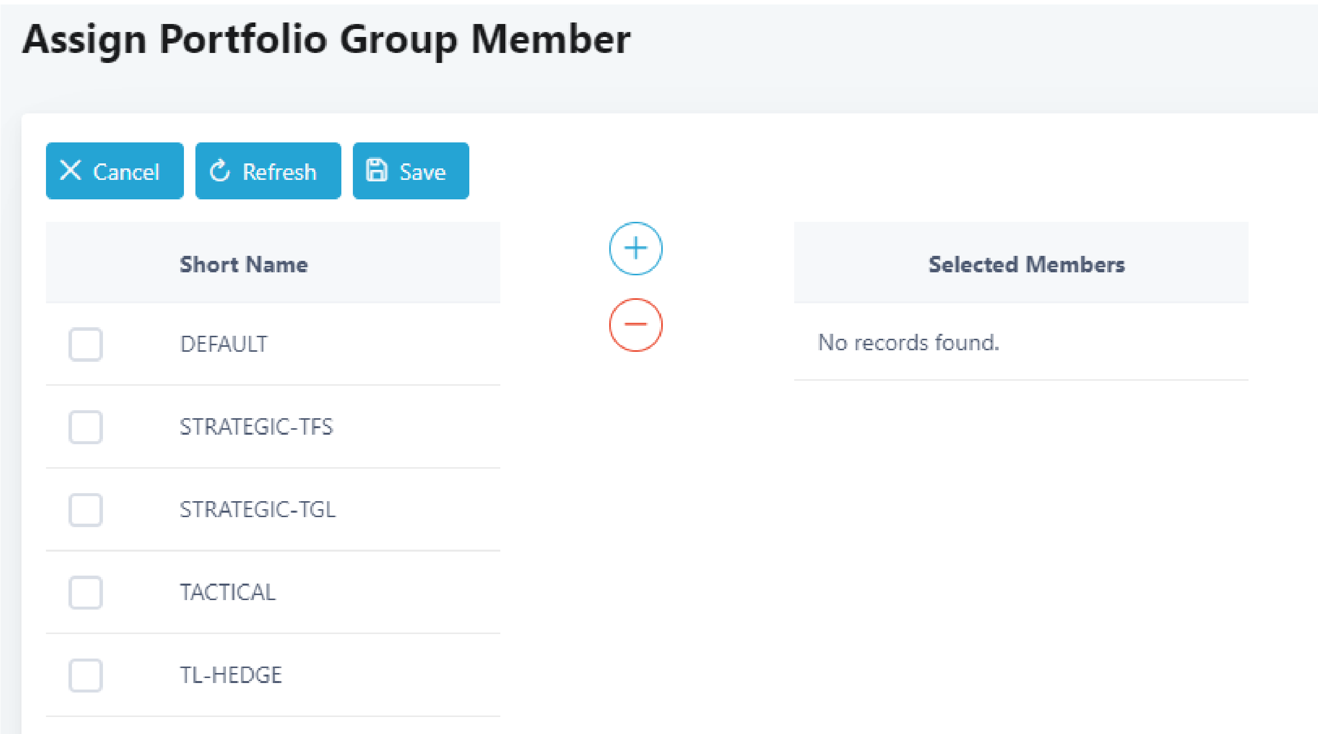
5. Click Save.

6. In the Portfolio Group main screen, you will see the newly created portfolio group displayed in the list.

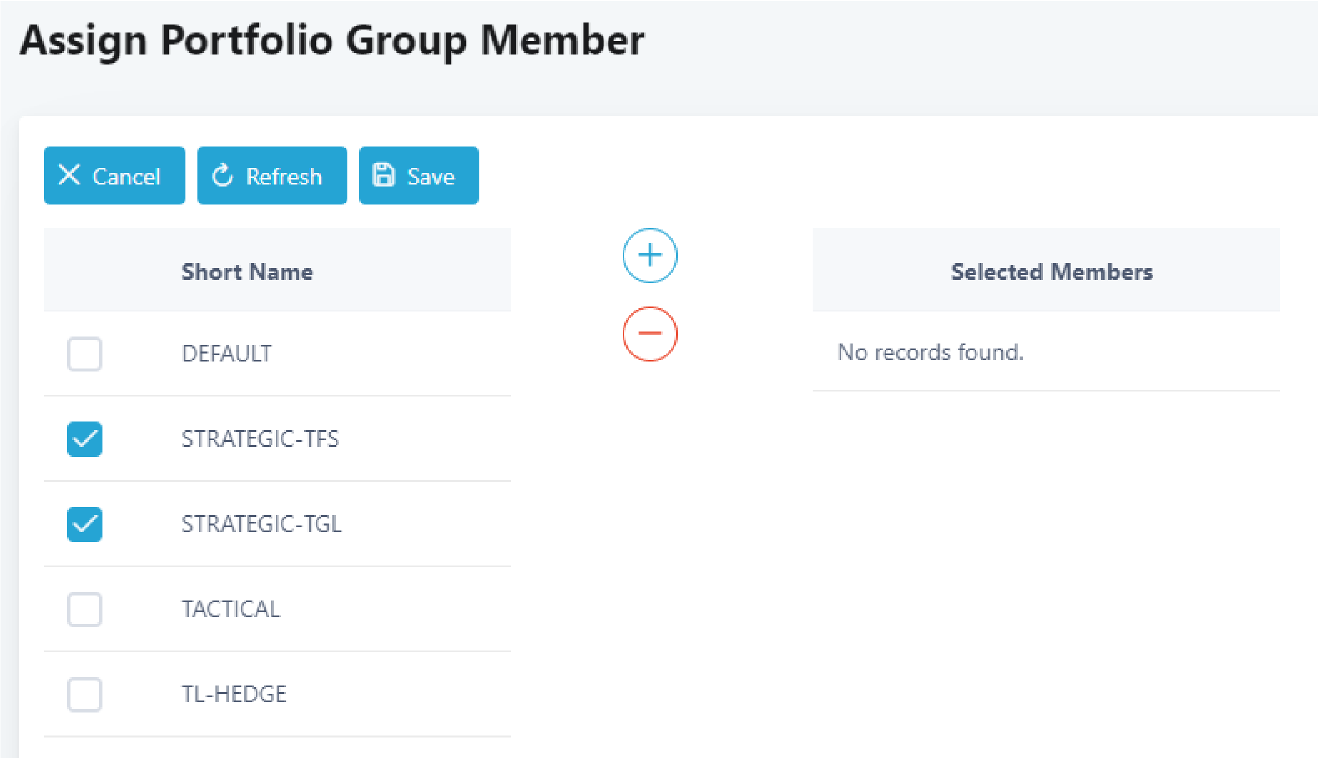
7. To assign members to the group, click on the Edit button of the portfolio group.



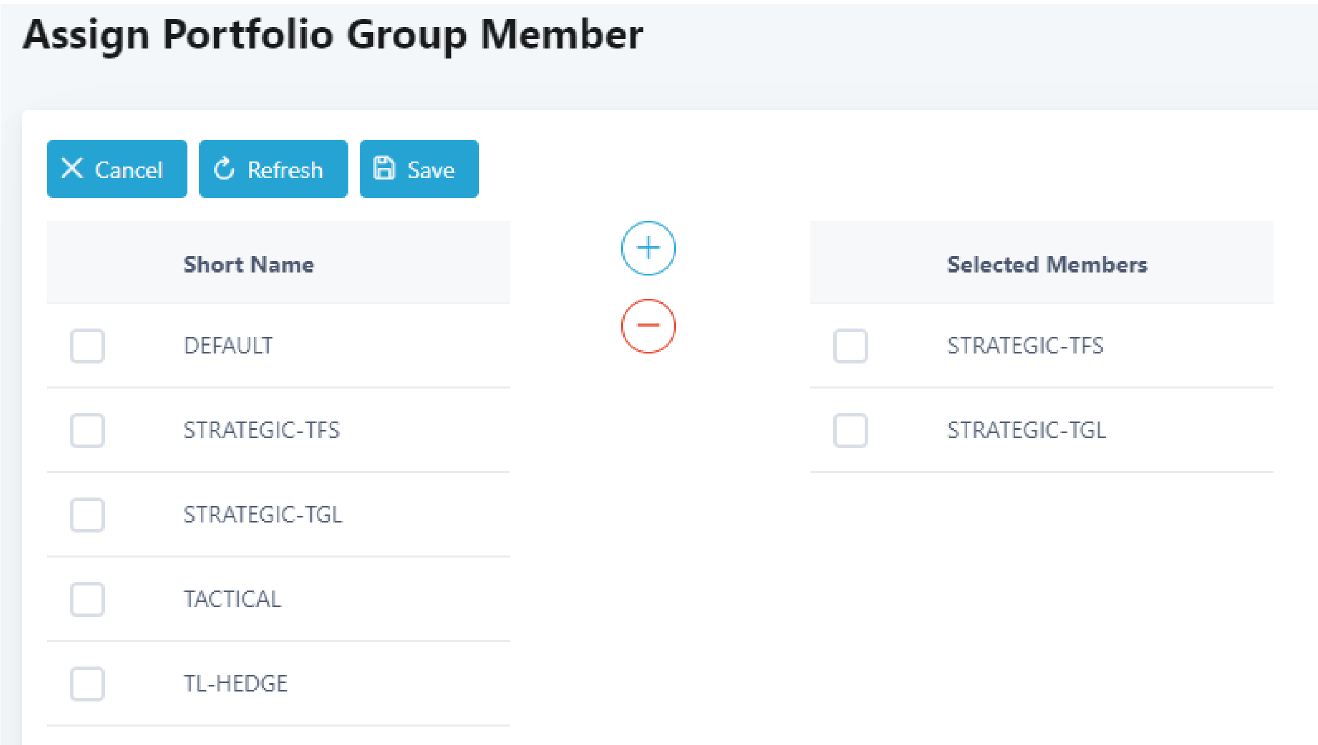
8. At the Amend Portfolio Group screen, click Assign Member. The Assign Portfolio Group Member screen will be displayed.



9. Click the checkbox beside the short name of the members to be added.



10. Click Add. The short names added will be moved to the right or the Selected Members’ column.



11. Click Save. You will be returned to Amend Portfolio Group screen.

12. Click Cancel button to return to Portfolio Group screen.

FREQUENTLY ASKED QUESTIONS

RELATED INFORMATION

Amend Portfolio Group

Duplicate Portfolio Group

Delete Portfolio Group

Set Up Risk Portfolio

CHANGE HISTORY

Date	By	Changes
21-Jul-2017	Clarissa	Created.
15-Nov-2019	Lyra	Updated screenshots.
13-Mar-2023	TS	Updated to W6 instructions and screenshots.