# Delete Portfolio Group (W5)

This version is superseded.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

### **PURPOSE**

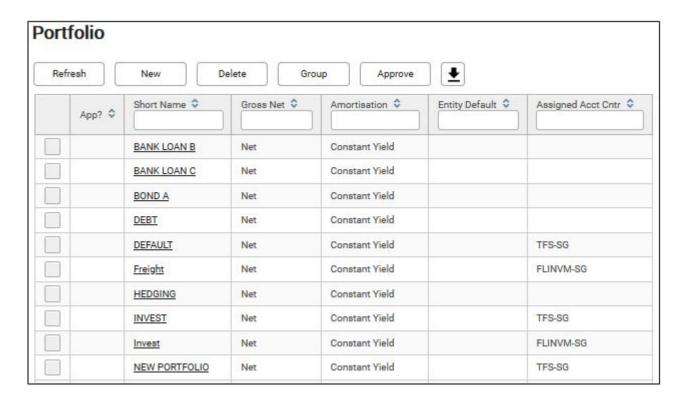
This document shows how to delete portfolio group.

#### **WHY IS THIS IMPORTANT?**

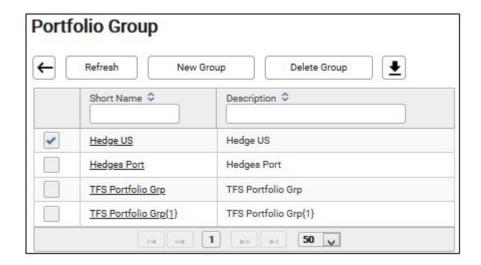
This allows unused portfolio groups to be removed from the system.

#### **PROCEDURE**

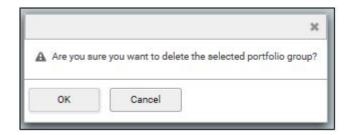
1. Select Set Up > Risk > Portfolio.



- 2. Click Group. The Portfolio Group screen will be displayed.
- 3. Tick the checkbox beside the short name of the group to be deleted.



4. Click Delete Group. A pop up will appear, click OK.



## **FREQUENTLY ASKED QUESTIONS**

## **RELATED INFORMATION**

Create Portfolio Group and Assign Members

Amend Portfolio Group

<u>Duplicate Portfolio Group</u>

## **CHANGE HISTORY**

Date	Ву	Changes
25-Jul-2017	Clarissa	Created.
28-Nov-2019	Lуга	Updated Screenshots.