Duplicate Portfolio Group (W5)

PURPOSE

This document shows how to duplicate portfolio group.

WHY IS THIS IMPORTANT?

This allows a quick set up of portfolio group when you need to create a portfolio group that is similar to the existing portfolio groups that you have in the list. By duplicating the portfolio group, the members assigned to the existing portfolio group will also be duplicated.
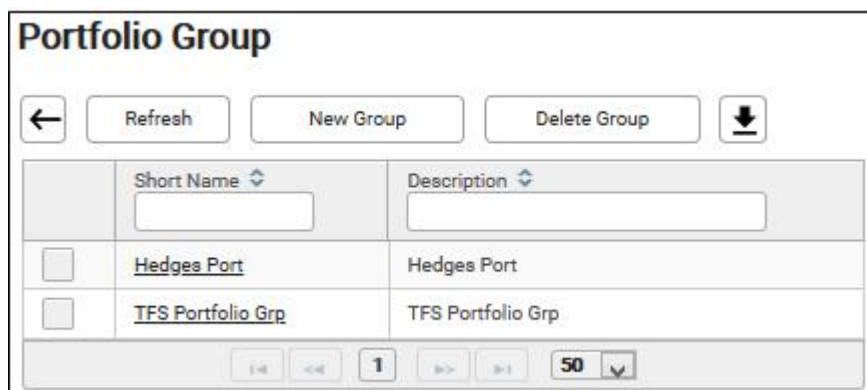
PROCEDURE

1. Select Set Up > Risk > Portfolio.

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

3. Click the Short Name of the Group to duplicate. In this example, TFS Portfolio Group will be duplicated.

4. The Amend Portfolio Group screen will be displayed.
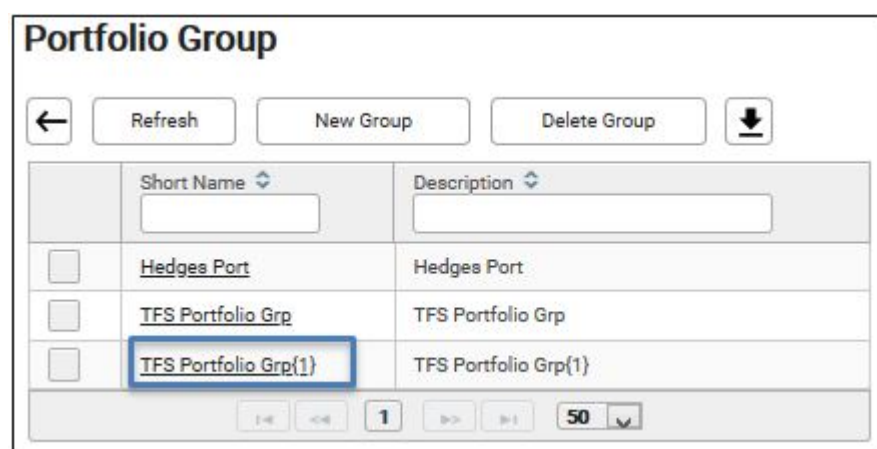
5. Click Duplicate. There will be another portfolio group with the same name but with {1} after. You may change the Short Name by clicking the Short Name and edit in the Amend Portfolio Group screen.

FREQUENTLY ASKED QUESTIONS

RELATED INFORMATION

[Create Portfolio Group and Assign Members](#)

[Amend Portfolio Group](#)

[Delete Portfolio Group](#)

CHANGE HISTORY

Date	By	Changes
25-Jul-2017	Clarissa	Created.
28-Nov-2019	Lyra	Updated Screenshots.