Duplicate Portfolio Group

See previous W5 version guide

PURPOSE

This document shows how to duplicate portfolio group.

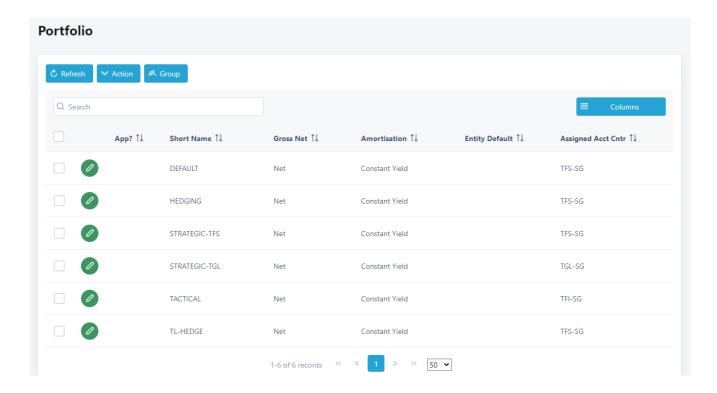
WHY IS THIS IMPORTANT?

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.

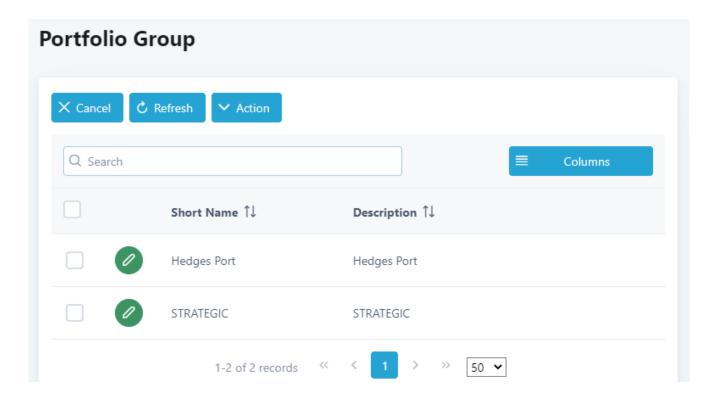
PROCEDURE



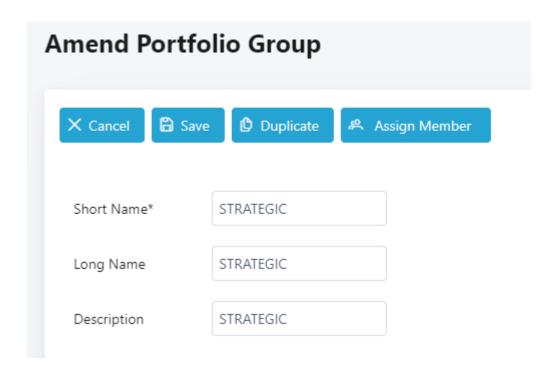
1. Select Set Up > Risk > Portfolio.



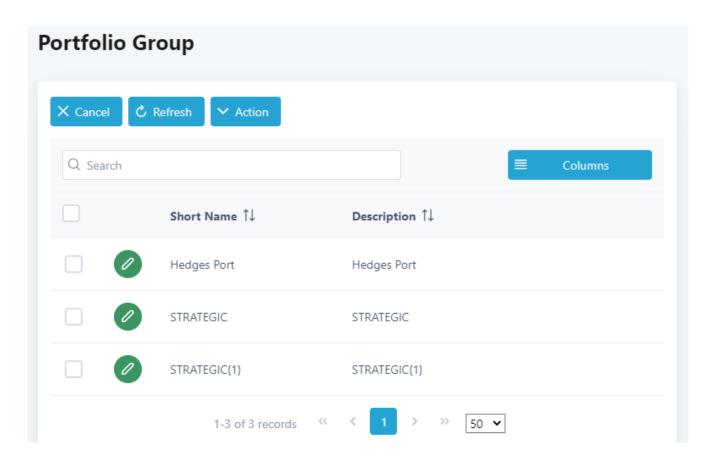
- 2. Click Group. The Portfolio Group screen will be displayed.
- 3. Click the Edit button of the group to duplicate. In this example, STRATEGIC portfolio group will be duplicated.



4. The Amend Portfolio Group screen will be displayed.



5. Click Duplicate. The portfolio group is now duplicated and the short name of the duplicated group is appended with {1}. You may change the Short Name by clicking the Edit button and amend the short name 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	Ву	Changes
25-Jul-2017	Clarissa	Created.
28-Nov-2019	Lуга	Updated screenshots.
21-Mar-2023	TS	Updated to W6 instructions and screenshots.