

# Launch Compliance Rules Group

[See previous W5 version guide](#)

## PURPOSE

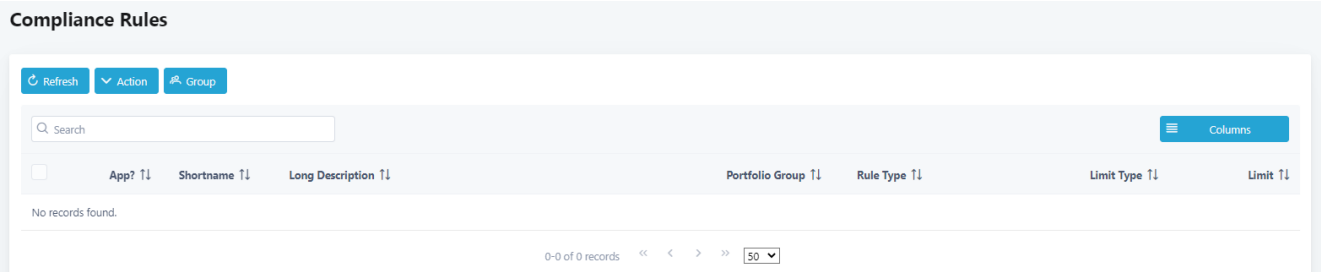
This document shows the detailed procedure in launching compliance rules group.

## WHY IS THIS IMPORTANT?

In order for compliance rules to be applied and tested against investment holding of a portfolio, the relevant rules must first be assigned to a compliance rule group and then tagged the compliance rule group to a portfolio.

## PROCEDURE

1. Select Set Up > Risk > Compliance.



2. Click Group.

## Compliance Rules Group

Cancel

Refresh

Action

Search

Columns

	Shortname ↑↓	Description ↑↓
<input type="checkbox"/>	<div> <div></div> <div>Compliance Grp A</div> </div>	Compliance Grp A

1-1 of 1 records

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3. This will list the available compliance rules groups.

## FREQUENTLY ASKED QUESTIONS

## RELATED INFORMATION

## CHANGE HISTORY

Date	By	Changes
15-Feb-2008	-	Created.
8-Sep-2017	Clarissa	Rewritten. Reformatted.
18-Nov-2019	Lyra	Updated screenshots.
21-Mar-2023	TS	Updated to W6 instructions and screenshots.