

## 5. PORTFOLIOS

The **Portfolio** module allows users to group investments into one or more portfolio categories. A user will be able to perform aggregate reporting across multiple investments and reporting.

### 5.1 Overview

The functions within the Portfolio module assist the user in adding investments and portfolios to a portfolio. One also has the ability to chart investments and graph investments that are in a portfolio.

Portfolio Name	Description	Template	Scope	Phase	Point of Contact
Portfolio 10		BY2009	Agency		ECPIC, Admin
Portfolio 100		BY2009	Agency		ECPIC, Admin
Portfolio 100		BY2009	Agency		ECPIC, Admin
Portfolio 101		BY2009	Agency		ECPIC, Admin
Portfolio 101		BY2009	Agency		ECPIC, Admin

### 5.2 Add Portfolio

There are several ways to create new Portfolios.

#### 5.2.1 Add Portfolio from Portfolio Module

1. Click on the **Portfolio** module.
2. Click on the **New Portfolio** icon  to open the *Add Portfolio* form. The Add Portfolio form will appear:

**Add Portfolio**

Name of Portfolio:

Template:

Description:

Scope:

Phase:

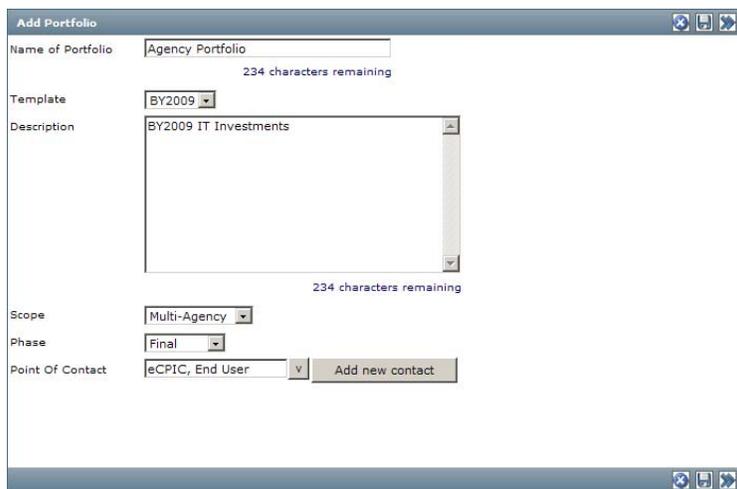
Point Of Contact:

3. Enter the **Name of the Portfolio**.
4. Select a **Template** for the Portfolio. *Select the blank value if the portfolio is not associated with a template.*

Portfolios can be associated with any of the active templates or no template at all. A user can select to associate the portfolio with the BY2005, BY2006, BY007, BY2008, BY2009 templates, or no template at all from the drop-down. If a template is not selected, a user will be able to add investments and portfolios from different templates.

**Note: Once a user selects a template for a portfolio, only items with the same template can be added to the portfolio. This option may NOT be edited at a later time. Additionally, a user must associate a portfolio with a template in order to place it into an OMB Submission Package.**

5. Select a **Scope** for the Portfolio.
6. Select the **Phase** for the Portfolio.
7. Enter the **Point of Contact**. By clicking on the drop-down arrow a user is able to make a selection. If no names appear or if the POC is not listed, click on the **Add new contact** button and fill in the required information. If no contact is selected, the creator of the portfolio will populate the field by default.
8. Click on the **Next** arrow  to save the information to the database and proceed to the *Select Investments* screen. You can also choose to **Save**  the information without moving forward or **Cancel**  to remove all data entered.



The screenshot shows the 'Add Portfolio' form with the following details:

- Name of Portfolio:** Agency Portfolio (234 characters remaining)
- Template:** BY2009
- Description:** BY2009 IT Investments (234 characters remaining)
- Scope:** Multi-Agency
- Phase:** Final
- Point Of Contact:** eCPIC, End User (with an 'Add new contact' button)