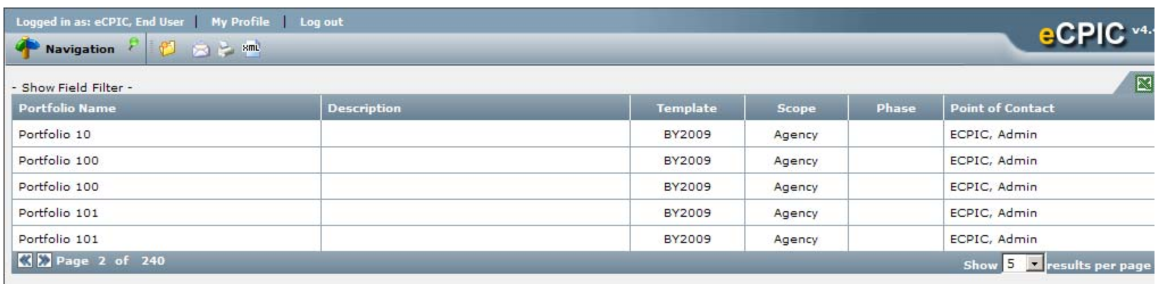
# 5. PORTFOLIOS

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.



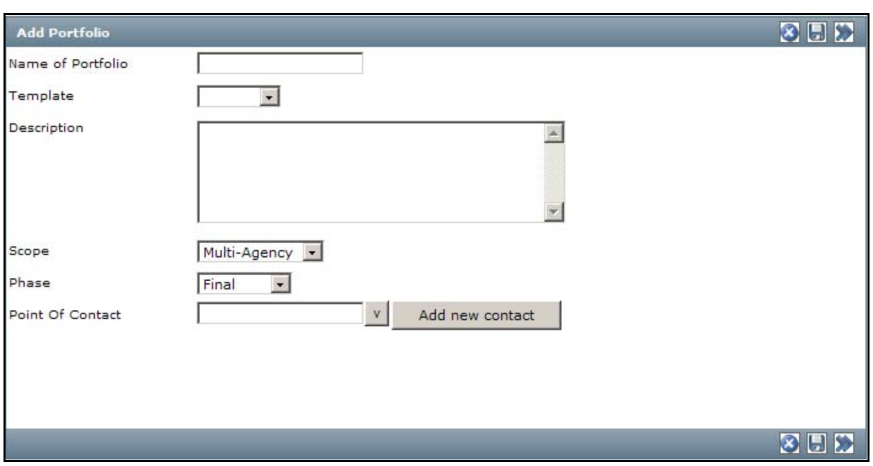

## 5.2 *Add Portfolio*

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:



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.