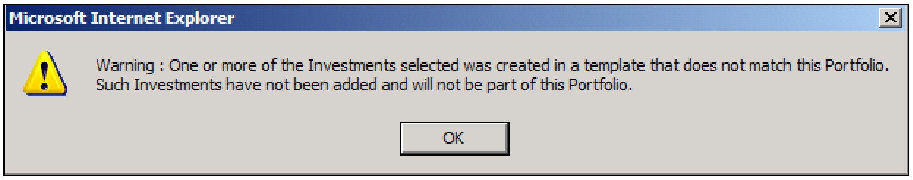


5. Click **Save** to save the investments. *The page navigator can be used to move to the next page*. Clicking on the **Next** arrow will save the information and return the user to the Portfolio Investments screen. Click **Cancel** to undo a selection made.

Once the investments have been saved, they will be viewable from the **Portfolio Investment** screen.

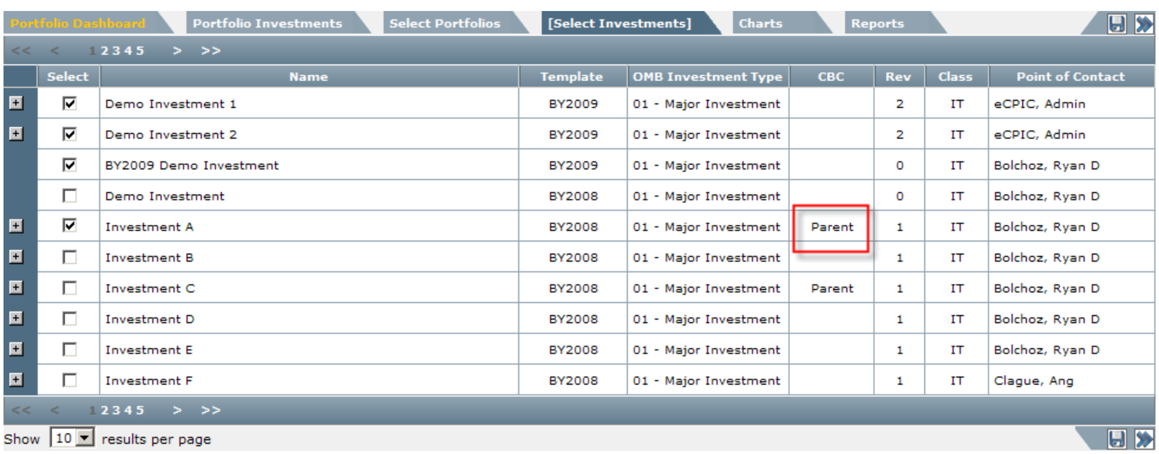
5.5.2 Add Consolidated Business Case

To Add a Consolidated Business Case:

1. Click on the **Portfolios** module.

2. Click on the **Portfolio Name** to select the portfolio within which to add the consolidated case(s).

3. Click the **Select Investment** tab. The Select Investment screen will appear:



Portfolio Dashboard | Portfolio Investments | Select Portfolios | [Select Investments] | Charts | Reports

<< < 1 2 3 4 5 > >>

Select	Name	Template	OMB Investment Type	CBC	Rev	Class	Point of Contact
☑	Demo Investment 1	BY2009	01 - Major Investment		2	IT	eCPIC, Admin
☑	Demo Investment 2	BY2009	01 - Major Investment		2	IT	eCPIC, Admin
☑	BY2009 Demo Investment	BY2009	01 - Major Investment		0	IT	Bolchoz, Ryan D
☐	Demo Investment	BY2008	01 - Major Investment		0	IT	Bolchoz, Ryan D
☑	Investment A	BY2008	01 - Major Investment	Parent	1	IT	Bolchoz, Ryan D
☐	Investment B	BY2008	01 - Major Investment		1	IT	Bolchoz, Ryan D
☐	Investment C	BY2008	01 - Major Investment	Parent	1	IT	Bolchoz, Ryan D
☐	Investment D	BY2008	01 - Major Investment		1	IT	Bolchoz, Ryan D
☐	Investment E	BY2008	01 - Major Investment		1	IT	Bolchoz, Ryan D
☐	Investment F	BY2008	01 - Major Investment		1	IT	Clague, Ang

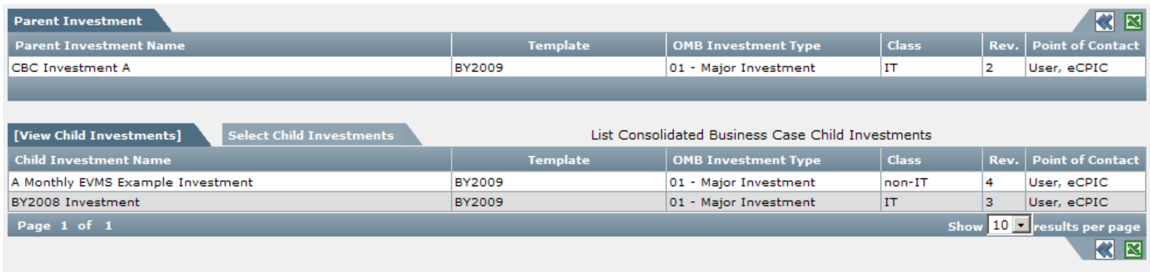
<< < 1 2 3 4 5 > >>

Show 10 results per page

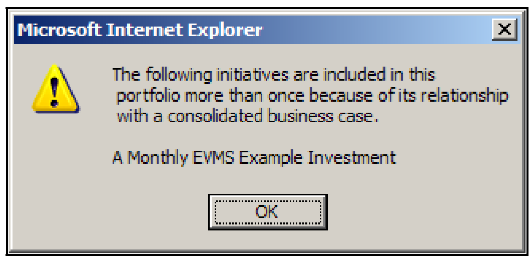
4. Check the consolidated business case(s) to add to the portfolio.

There is a Consolidated Business Case column which allows users to identify the consolidated investments easily. In the column, a 'True' will appear if it is a consolidated business case.

Clicking on the ‘True’ link in the Consolidated Business Case column will pop-up a listing of investments that are the CBC investment's children. This helps keep track of investments relationship to other investments and helps to avoid selecting a parent and its child investments into the same portfolio.



If a user selects a consolidated business case and selects an investment that is a child of the consolidated business case into a portfolio, a warning message will be generated.



Note: The warning message that appears when a user selects a consolidated business case and its children for selection into a portfolio is just to ensure that the user does not double count an investment while performing analysis on the portfolio. Though the application generates a warning when this occurs, it will not prevent the user from doing so. If a user selects OK to acknowledge the warning message, they will receive it again each time that the portfolio contents are accessed.

5. Click **Save** to save the investments. *The page navigator can be used to move to the next page.* Clicking on the **Next** arrow will save the information and return the user to the *Portfolio Investments* screen. Click **Cancel** to undo a selection made.

Once the consolidated investments have been saved, they will be viewable from the **Portfolio Investment** screen.