Update Notes

Trade Allocation & Position Transfer (Portfolio Sample)

When to update this module

- Process changes: required fields, cutoff timing, authorization rules, or exception criteria.
- Workflow changes: routing/escalation path, required documentation, or notification contacts.
- System/UI changes: screens, labels, or steps referenced in the scenario/video placeholders.
- Policy/regulatory changes affecting controls, documentation, or audit expectations.

What to update (checklist)

☐ Scenario text + decisions (Decision 1–3): keep wording aligned to current process and controls.

☐ Workflow diagram steps (click-to-reveal): verify step names and order.

☐ Exception examples (“Spot the exception”): ensure examples match real failure types.

☐ Knowledge Check items + feedback: keep questions and feedback aligned to current rules.

☐ Job Aid: keep each step accurate (especially Route/Document/Notify details).

QA before publishing

☐ Run-through: all buttons/menu links work; no dead ends; results slide behaves correctly.

☐ Accuracy: updated text matches current process; no outdated cutoff/field names.

☐ Accessibility quick check: tab order, alt text where used, contrast readable.

☐ Publish test: verify output plays in target environment (Review / web) and links open as expected.

Change log (fill when updated)

Version	Date	Change summary	Updated by