

How do I filter on field values in the grid?

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When you have added a data column to the grid you can then filter the grid by clicking on values in the column. For example, in the first screenshot, clicking on the highlighted “Yes” value (or any of the other Yes values below it) would add filtering on phased investment.

The screenshot shows the 'Investment Bond Unit Linked' interface. On the left, there is a 'Filtering' sidebar with various feature checkboxes. The main area displays a table of 20 contracts. The 'Phased investment facility' column has a 'Yes' value for 'MetLife Services Ltd' which is highlighted in green and has a red box around it. Other 'Yes' values are also present for AXA Wealth, Canada Life, and HSBC Life (UK) Ltd.

Company	Contract	Phased investment facility
Aviva Life & Pensions UK Limited	Select Investment Growth & Income Option	No
AXA Wealth	Investment Bond (Adviser Charging)	Yes
Canada Life	CanInvest Select Account	Yes
HSBC Life (UK) Ltd	HSBC Onshore Investment Bond (Select 0.35)	Yes
Legal & General	Select Portfolio Bond	No
MetLife Services Ltd	MetLife Investment Bond	Yes
Nucleus	Nucleus Onshore Bond	No
Old Mutual Wealth	Collective Investment Bond	Yes
Prudential Intermediary Division	Prudence Inheritance Bond	No
Prudential Intermediary Division	Prudential Investment Plan (PIP)	Yes
Prudential Intermediary Division	Prudential Onshore Portfolio Bond	No
Sanlam	Portal Onshore Bond	No
Sanlam	Versatile Investment Portfolio	Yes
Scottish Friendly	Scottish Friendly Onshore Bond Platform Account	No
Scottish Widows	Investment Bond - Initial charge option	No
Scottish Widows	Investment Bond - Withdrawal charge option	No

In other words, you can add fields to the grid to see which contracts offer that feature, and then only filter on the value after you’ve found out this information. This is effectively a “query by example”, and can be easier to use than creating filters manually using the field list to the left of the screen.

If you click on a numeric field rather than a yes/no field then the system displays the pop-up menu illustrated by the second screenshot.

The screenshot shows the same interface as the first screenshot, but with a pop-up menu over the 'Yes' value for 'MetLife Services Ltd'. The menu offers three options: 'Field options', 'Filter on this value', and 'Show contents'.

Company	Contract	Phased investment facility
Aviva Life & Pensions UK Limited	Select Investment Growth & Income Option	No
AXA Wealth	Investment Bond (Adviser Charging)	Yes
Canada Life	CanInvest Select Account	Yes
HSBC Life (UK) Ltd	HSBC Onshore Investment Bond (Select 0.35)	Yes
Legal & General	Select Portfolio Bond	No
MetLife Services Ltd	MetLife Investment Bond	Yes
Nucleus	Nucleus Onshore Bond	No
Old Mutual Wealth	Collective Investment Bond	Yes
Prudential Intermediary Division	Prudence Inheritance Bond	No
Prudential Intermediary Division	Prudential Investment Plan (PIP)	Yes
Prudential Intermediary Division	Prudential Onshore Portfolio Bond	No
Sanlam	Portal Onshore Bond	No
Sanlam	Versatile Investment Portfolio	Yes
Scottish Friendly	Scottish Friendly Onshore Bond Platform Account	No
Scottish Widows	Investment Bond - Initial charge option	No
Scottish Widows	Investment Bond - Withdrawal charge option	No

This provides three different filtering options: greater or equal to, less or equal to, and simply equal to.

You cannot filter on fields which are purely textual rather than numeric. If you click on these fields then the system simply shows the field’s contents in a pop-up window.

