

How do I filter on field values in the grid?

Last Modified on 01/06/2017 2:36 pm BST

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' software interface. On the left is a 'Filtering' sidebar with a list of features and checkboxes. The main area displays a table of 20 contracts. The 'Phased investment facility' column is highlighted, and a red box is drawn around the 'Yes' value for the 'MetLife Services Ltd' contract.

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
Sarlam	Portal Onshore Bond	No
Sarlam	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.

Filtering | Ranking | Report | Quote | Comparison | Change title | Save as PDF | Delete | Copy | Send | Not shared | Help

Features	Sectors	Conditions	Stats	PP	All 20 contracts - 0 manually excluded			Options
					Company	Contract	Phased investment facility	
<input type="checkbox"/>					Aviva Life & Pensions UK Limited	Select Investment Growth & Income Option	No	
<input type="checkbox"/>					AXA Wealth	Investment Bond (Adviser Charging)	Yes	
<input type="checkbox"/>					Canada Life	CanInvest Select Account	Yes	
<input type="checkbox"/>					HSBC Life (UK) Ltd	HSBC Onshore Investment Bond (Select 0.35)	Yes	
<input type="checkbox"/>					Legal & General	Select Portfolio Bond	No	
<input type="checkbox"/>					MetLife Services Ltd	MetLife Investment Bond	Yes	
<input type="checkbox"/>					Nucleus	Nucleus Onshore Bond	Yes	Field options
<input type="checkbox"/>					Old Mutual Wealth	Collective Investment Bond	Yes	Filter on this value Show contents
<input type="checkbox"/>					Prudential Intermediary Division	Prudence Inheritance Bond	No	
<input type="checkbox"/>					Prudential Intermediary Division	Prudential Investment Plan (PIP)	Yes	
<input type="checkbox"/>					Prudential Intermediary Division	Prudential Onshore Portfolio Bond	No	
<input type="checkbox"/>					Sanlam	Portal Onshore Bond	No	
<input type="checkbox"/>					Sanlam	Versatile Investment Portfolio	Yes	
<input type="checkbox"/>					Scottish Friendly	Scottish Friendly Onshore Bond Platform Account	No	
<input type="checkbox"/>					Scottish Widows	Investment Bond - Initial charge option	No	
<input type="checkbox"/>					Scottish Widows	Investment Bond - Withdrawal charge option	No	

Discounted gift bond
 Discounted gift friendly
 Single life
 Joint life first death
 Joint life last survivor
 Extra life cover available
 Life of another
 Death benefit
 Phased investment facility
 Split investment (UL/UWP)
 Segmentation
 Loyalty bonus

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.