

How do I filter using a grid of contracts?

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When you start a piece of research, the filtering screen only displays the company and name of the contract:



Any number of data fields can be added to the grid to view by simply selecting (clicking on) the field name from any of the tabs on the left hand side of the grid:



The Field chooser

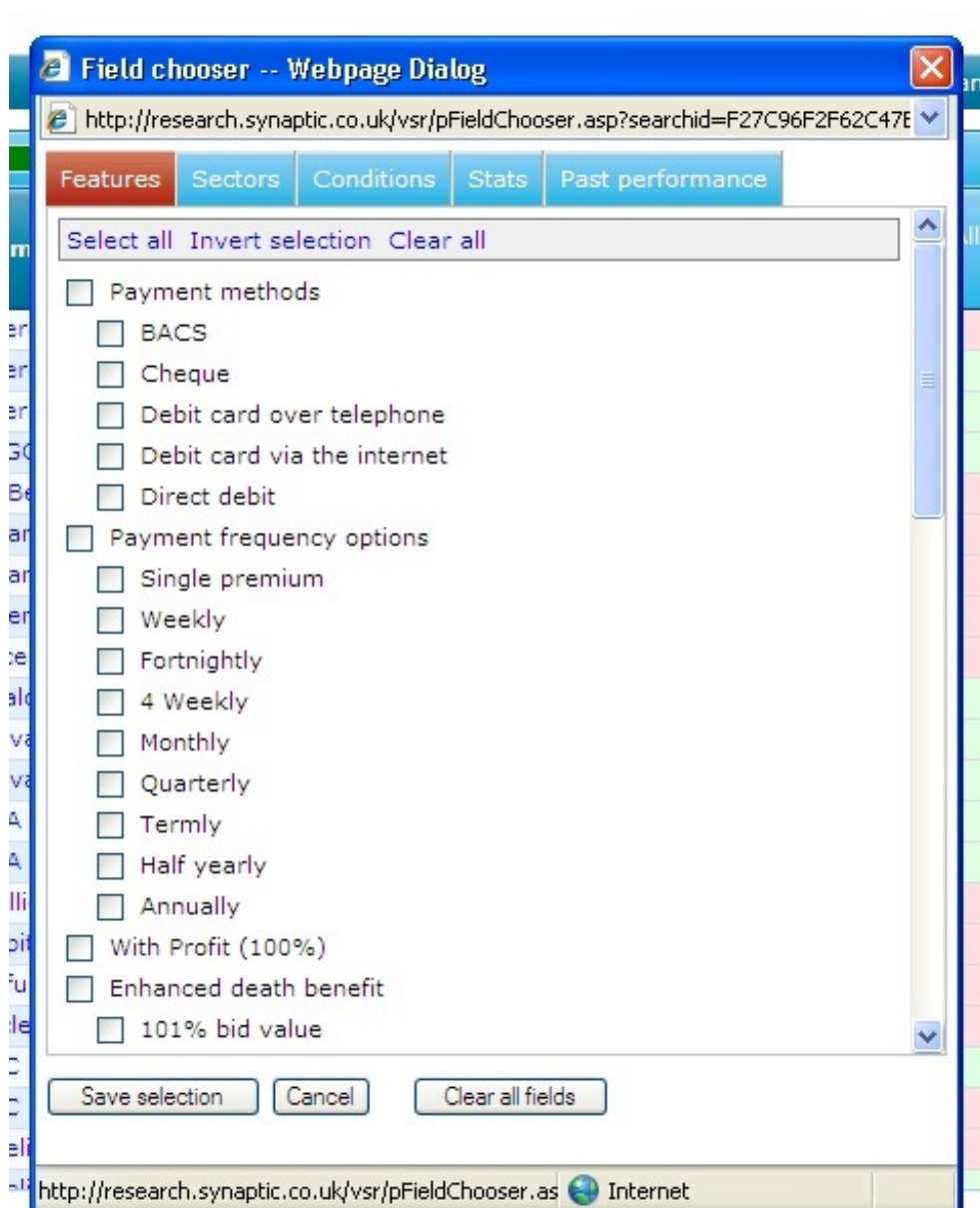
The section above explains how to add fields to the grid one at a time. Alternatively,

you can add multiple fields at once by using the field chooser option.

Select **Options** from the top right of the screen and **Field chooser**:



A pop up window will be displayed listing all the fields to choose from:



Simply tick the fields you want to include in the grid and select save selection. The fields will then be displayed in the grid as seen earlier in this article.

If you want to view all the fields we would recommend you use the **Comparison** tool rather than adding all fields to the grid. This is due to the amount of data it can result in the system running slowly. Please refer to the **Comparison** tool article for more information.

Removing fields from the grid

Selecting (clicking on) the field name from the list on the left hand side will remove the column of data from the grid.

You can also remove a column of data by right clicking on the column header and selecting **Remove from grid** from the pop up menu:



The screenshot shows a data grid with several columns. A context menu is open over the 'Minimum monthly contribution' column header. The menu options are: 'Remove from grid', 'Sort ascending', and 'Sort descending'. The grid data is as follows:

All switches free	Unit Trust: IMA UK All Companies	contribution	Minimum monthly contribution
No	No		
Yes	No		
Yes	Yes		
Yes	Yes		£20
No	Yes		None
No	Yes		£50

You can also remove all the columns that have been added by selecting **Options** from the top right of the screen and **Remove all fields**:



Hiding the list of fields

If you added a large number of fields and you are having to use the scroll bar along the bottom of the screen to view all the columns, you can make more space on the screen by removing the field list on the left hand side.

Select **Options** from the top right of the screen, as shown above and select **Hide field list**:

Filtering								Ranking	Report	Comparison	Change title
All 75 contracts - 0 manually excluded											
Company	Contract	Accepts transfers in	Model portfolios	All switches free	Unit Trust: IMA UK All Companies	Minimum monthly contribution (£)					
Aberdeen Asset Manag	Aberdeen Investment Trust ISA	Yes	No	No	No	£100					
Aberdeen Asset Manag	Aberdeen Multi-Manager Unit Trust	Yes	No	Yes	No	£100					
Aberdeen Asset Manag	Aberdeen UK OEIC ISA	Yes	No	Yes	Yes	£90					
AEGON Retirement C	AEGON Stocks & Shares ISA	Yes	Yes	Yes	Yes	£20					
AJ Bell (Sippcentre)	AJ Bell Sippcentre Investment ISA	Yes	No	No	Yes	None					
Alliance Trust Saving	ISA - Stocks & Shares Component	Yes	No	No	Yes	£50					
Allianz Global Investc	Investment Funds ISA	Yes	No	No	Yes	£200					
Artemis Fund Manage	ISA	Yes	No	No	Yes	£50					
Ascentric	Ascentric Stocks & Shares ISA	Yes	No	No	Yes	None					
Avalon Investment S	Freedom ISAs	Yes	Yes	Yes	Yes	£80 (£40 per fun					
Aviva Investors	Aviva Investors Investment ISA	Yes	No	Yes	Yes	£90					
Aviva Wrap UK Ltd	Aviva Wrap ISA Portfolio	Yes	Yes	Yes	Yes	£50					
AXA Elevate	Elevate Stocks & Shares ISA - Cor	Yes	Yes	Yes	Yes	£100					
AXA Elevate	Elevate Stocks & Shares ISA - Exp	Yes	Yes	Yes	Yes	£100					
Baillie Gifford	Baillie Gifford Investment Trust IS	Yes	No	No	No	£100					
Capita Financial Manag	ISA	Yes	No	No	Yes	£50					
Cofunds Ltd	ISA	Yes	Yes	No	Yes	£90					
Ecclesiastical	The Ecclesiastical ISA	Yes	No	No	Yes	£25					
F&C Fund Managemen	F&C ISA	Yes	No	Yes	Yes	£90					
F&C Unit Managemen	Foreign & Colonial Investment Tru	Yes	No	No	No	£90					
Fidelity FundsNetwork	FundsNetwork	Yes	Yes	No	Yes	£90					
Fidelity FundsNetwork	FundsNetwork	Yes	Yes	Yes	Yes	£90					

The list can be re-displayed by selecting **Options** and **Show field list**.

Sorting the grid

By default the grid of contacts is sorted by the company name and then by contract name. The field on which the grid is currently sorted is highlighted in a darker blue in the column heading.

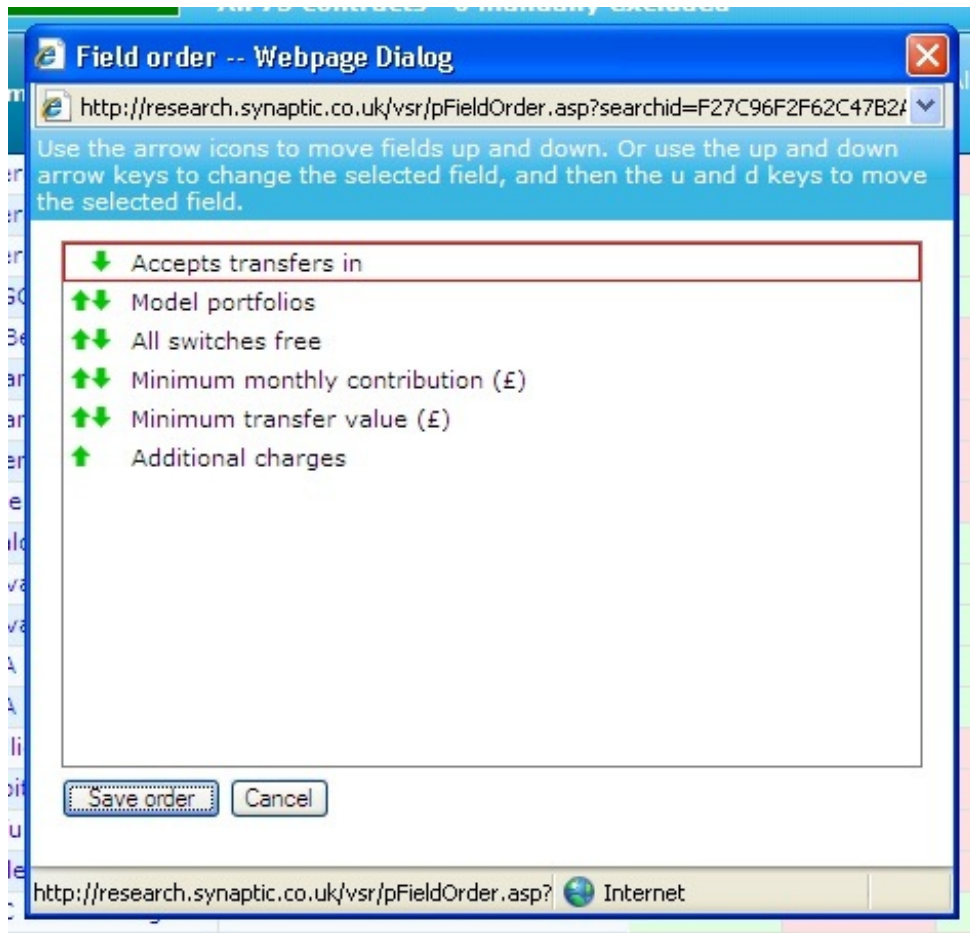
You can sort the grid on a different column simply by selecting the column heading.

Alternatively, you can right click over the column heading and select either **Sort ascending** or **Sort descending**:

All switches free	Unit Trust: IMA UK All Companies	Minimum monthly contrib	Field options
No	No		Remove from grid
Yes	No		Sort ascending
Yes	Yes		Sort descending
Yes	Yes	£20	
No	Yes	None	
No	Yes	£50	

Changing the order of data fields in the grid

Once you have added fields to the research grid, you can change the order of the columns by selecting **Options** from the top right of the screen and **Change field order**. A pop up window will display the fields you are currently viewing in the grid:



You can change a field's position by selecting the up and down arrows next to the field's name.

Once you are happy with the revised order of fields, select **Save order**.

You will be returned to the grid with the fields in their new order.

Flipping the grid

Note - Flipping the grid only applies to product research. It is not available on fund research.

When you are dealing with a small number of contracts and a large number of data fields. It can be easier to view the grid with the contracts along the top rather than down the side.

The grid can be flipped by selecting **Options** from the top right of the screen and **Flip grid**:

12 contracts out of 75 (16%) - 0 manually excluded							Options
Field/contract	AEGON Retirement Choices AEGON Stocks & Shares ISA	AJ Bell (Sippcentre) AJ Bell Sippcentre Investment ISA	Ascentric Ascentric Stocks & Shares ISA	Avalon Investment Services Freedom ISAs	Aviva Wrap UK Ltd Aviva Wrap ISA Portfolio		
Accepts transfers in	Yes	Yes	Yes	Yes	Yes	Yes	
All switches free	Yes	No	No	Yes	Yes	Yes	
Model portfolios	Yes	No	No	Yes	Yes	Yes	
Minimum monthly contribution (£)	£20	None	None	£80 (£40 per fund)	£50	£50	
Additional charges	£0	£0	£0	£0	£0	£0	
Linked funds	1842	2831	2656	3565	1869	1869	
Special offer	No	No	No	No	No	No	
MoM funds	Yes	Yes	Yes	Yes	Yes	Yes	
Unit Trust: IMA UK All Companies	Yes	Yes	Yes	Yes	Yes	Yes	

When in **"Flipped"** mode the grid continues to be usable as before, except you can no longer sort by clicking on the column headings.

Filtering on field values in the grid

When you have added a data column to the grid you can filter the grid from the values displayed. For example the data column may contain a mixture of **'Yes'** and **'No'**, if you want to filter on the **'Yes'**, simply right click on **'Yes'** and select **Filter on this value**:



This can be useful when you have added fields to the grid to see which contracts offer that feature and then only filter on the relevant value.

If you right click on a numeric field you get different options in the pop up window to perform the filter:

2831	No	
2656	No	
Filter options		
Greater or equal to		
Less or equal to		
Equal to		
Show contents		
1849	No	

You cannot filter on fields which are purely textual with notes about the contract. If you select these fields a pop up window will display the notes in full.

Saving and exporting the research grid

The research grid, including all the data fields that have been added, can be saved in PDF format by selecting **Save as PDF** from the menu bar:

STOCKS and SHARES

| Change title | Save as PDF | Delete | Copy | Send | Not shared | Help

				Options
arges	Linked funds	Special offer	MoM funds	Unit Trust: IMA UK All Companies