



UBS Neo

Visual Designs **Meerkat - Filtering treatment**

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This is a working document and is subject to change

Prototype: <https://ubs-neo.invisionapp.com/console/share/7GQ92Z38NUV/919201589>

Meerkat - Filtering treatment

Initial visual design

Basic blotter layout

Active filters (when applied)

Toggle to show/hide column filters (currently showing)

Filters / Group / Tools row

Filter row

Selected row

Blotter content

Created	Reference	Status	Client	Underlying	Product	Notional	CCY	Quantity	Primary Sales	Acting Sales
06.38 03-Feb-22	OD411615	⚠ Quoted	Client 1	AAPL	Equity Option	100	USD	1,200	Test Sales	Test Sales
06.38 03-Feb-22	OD411616	QuoteRequested	Client 2	APPL	Equity	100	USD	1,000	Test Sales	Test Sales
06.38 03-Feb-22	OD411617	✅ Executed	Client 3	ART	Equity	1,000,000	USD	1,200	Test Sales	Test Sales
06.38 03-Feb-22	OD411618	Open	Client 4	BLA	TRS	1,000,000	USD	1,000	Test Sales	Test Sales
06.38 03-Feb-22	OD411619	Open	Client 5	BLA	TRS	15,000,000	USD	1,000	Test Sales	Test Sales
06.38 03-Feb-22	OD411620	Open	Client 6	BLA	TRS	15,000,000	USD	1,000	Test Sales	Test Sales
06.38 03-Feb-22	OD411621	✅ Executed	Client 7	ART	Equity	1,000,000	USD	1,200	Test Sales	Test Sales
06.38 03-Feb-22	OD411616	QuoteRequested	Client 2	APPL	Equity	100	USD	1,000	Test Sales	Test Sales

Specs

200px wide

Created	Reference	Status	Client	Underlying	Product	Notional	CCY	Quantity	Primary Sales	Acting Sales
06.38 03-Feb-22	OD411615	⚠ Quoted	Client 1	AAPL	Equity Option	100	USD	1,200	Test Sales	Test Sales
06.38 03-Feb-22	OD411616	QuoteRequested	Client 2	APPL	Equity	100	USD	1,000	Test Sales	Test Sales
06.38 03-Feb-22	OD411617	✅ Executed	Client 3	ART	Equity	1,000,000	USD	1,200	Test Sales	Test Sales
06.38 03-Feb-22	OD411618	Open	Client 4	BLA	TRS	1,000,000	USD	1,000	Test Sales	Test Sales
06.38 03-Feb-22	OD411619	Open	Client 5	BLA	TRS	15,000,000	USD	1,000	Test Sales	Test Sales

Meerkat - Filtering treatment

Initial visual design

Blotter default view

Add filter button when no filter is applied

My My Clients All **+ Add Filter** Reset

Group by Add group

Created	Reference	Status	Client	Underlying	Product	Notional	CCY	Quantity	Primary Sales	Acting Sales
06.38 03-Feb-22	OD411615	⚠ Quoted	Client 1	AAPL	Equity Option	100	USD	1,200	Test Sales	Test Sales
06.38 03-Feb-22	OD411616	QuoteRequested	Client 2	APPL	Equity	100	USD	1,000	Test Sales	Test Sales
06.38 03-Feb-22	OD411617	✅ Executed	Client 3	ART	Equity	1,000,000	USD	1,200	Test Sales	Test Sales
06.38 03-Feb-22	OD411618	Open	Client 4	BLA	TRS	1,000,000	USD	1,000	Test Sales	Test Sales

Column filters appear on mouse over

Blotter default view with filter applied

My My Clients All Status: Quoted ✕ **+ Reset**

Group by Add group

Created	Reference	Status	Client	Underlying	Product	Notional	CCY	Quantity	Primary Sales	Acting Sales
06.38 03-Feb-22	OD411615	⚠ Quoted	Client 1	AAPL	Equity Option	100	USD	1,200	Test Sales	Test Sales
06.38 03-Feb-22	OD411616	⚠ Quoted	Client 2	APPL	Equity	100	USD	1,000	Test Sales	Test Sales
06.38 03-Feb-22	OD411617	⚠ Quoted	Client 3	ART	Equity	1,000,000	USD	1,200	Test Sales	Test Sales

Column filters row appear on mouse over

Mouse over

Active filters shown as dismissible pills

Toggle selected state

My My Clients All Status: Quoted ✕ **+ Reset**

Group by Add group

Created	Reference	Status	Client	Underlying	Product	Notional	CCY	Quantity	Primary Sales	Acting Sales
06.38 03-Feb-22	OD411615	⚠ Quoted	Client 1	AAPL	Equity Option	100	USD	1,200	Test Sales	Test Sales
06.38 03-Feb-22	OD411616	⚠ Quoted	Client 2	APPL	Equity	100	USD	1,000	Test Sales	Test Sales
06.38 03-Feb-22	OD411617	⚠ Quoted	Client 3	ART	Equity	1,000,000	USD	1,200	Test Sales	Test Sales

Column filters row displayed on mouse over

Blotter content moves down

Filter applied to column

Mouse over icon (16x16 background - #Tundora)

Column row hidden

Toggle hidden state

My My Clients All Status: Quoted ✕ **+ Reset**

Group by Add group

Created	Reference	Status	Client	Underlying	Product	Notional	CCY	Quantity	Primary Sales	Acting Sales
06.38 03-Feb-22	OD411615	⚠ Quoted	Client 1	AAPL	Equity Option	100	USD	1,200	Test Sales	Test Sales
06.38 03-Feb-22	OD411616	⚠ Quoted	Client 2	APPL	Equity	100	USD	1,000	Test Sales	Test Sales
06.38 03-Feb-22	OD411617	⚠ Quoted	Client 3	ART	Equity	1,000,000	USD	1,200	Test Sales	Test Sales

Meerkat - Filtering treatment

Initial visual design

Filter types

Created	Reference	Status	Client	Underlying	Product	Notional	CCY	Quantity	Primary Sales	Acting Sales
Date									Search	Search
1	4	3	3	3	3	5	3	5	3	3

Filter types explained (based on Federal interaction styles)

(1) Date

Default:

Mouse over field:

Click on icon: (dropdown menu)

Federal design of dropdown TBC

Populated:

Populated over:

Over clear icon: (Clear filter)

Text entry:

(2) Date and time

Later phase will include input field

Default:

Mouse over field:

Click on icon: (dropdown menu)

Federal design of dropdown TBC

Populated:

Populated over:

Over clear icon: (Clear filter)

Text entry:

(3) Multi-select list with fixed options & Lookup

Default:

Mouse over icon: (dropdown menu)

Click on icon: (dropdown menu)

(Text input is optional)

Populated:

Over filter icon: (Amend filter)

Over clear icon: (Clear filter)

(4) Free text search

Default:

Mouse over field:

Click into field:

Populated:

Populated over:

Mouse over icon: (Spinner icon maybe needed)

(5) Numeric

Default:

Mouse over icon: (dropdown menu)

Click on icon: (dropdown menu)

Filter dropdown opens

Populated:

Over filter icon: (Amend filter)

Over clear icon: (Clear filter)