UBS Neo
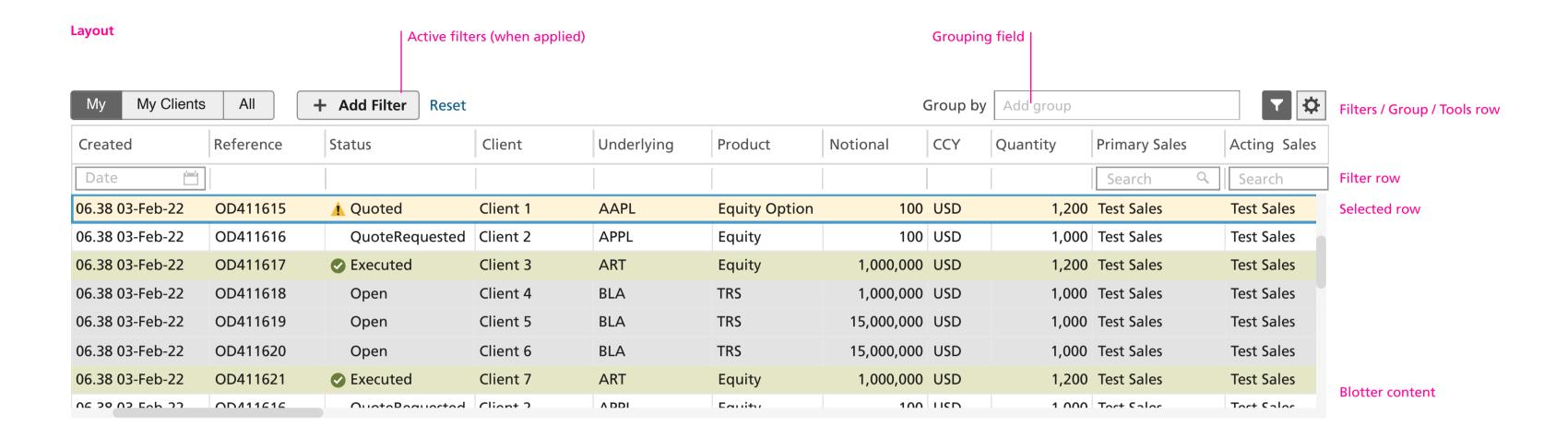# Visual Designs Meerkat - Grouping treatment
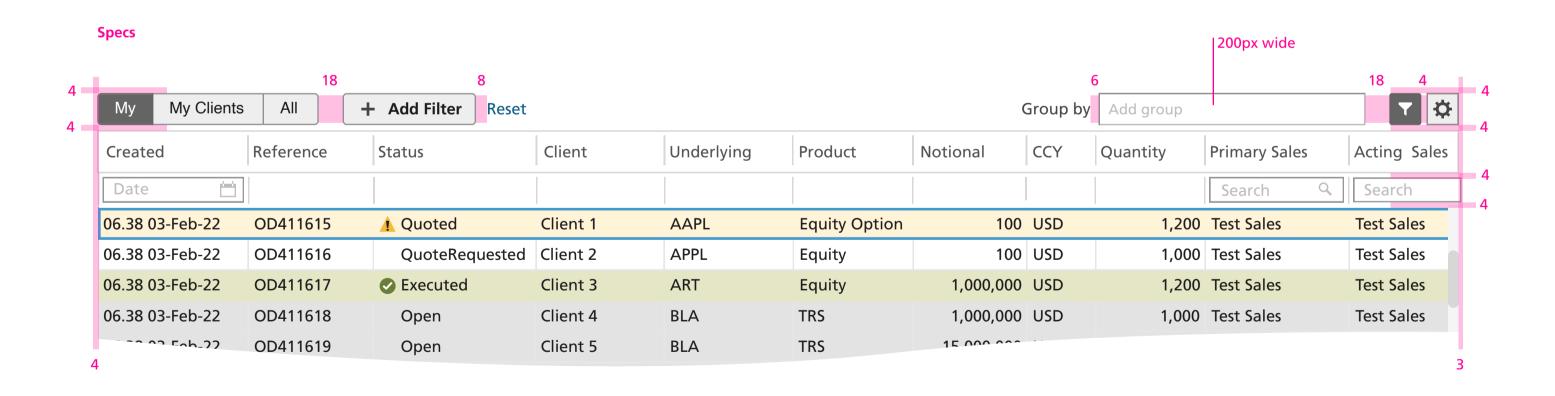
Created by: Tarek Quereshi
Updated: July 2022

This is a working document and is subject to change

Prototype: https://ubs-neo.invisionapp.com/console/share/QEHK4UFPSJT/913506437

Meerkat - Grouping treatment
Basic blotter layout

Layout

Active filters (when applied)

Grouping field

| My | My Clients | All | | + Add Filter | Reset | | Group by | Add group | | 🔽 | ⚙ | Filters / Group / Tools row |

Created	Reference	Status	Client	Underlying	Product	Notional	CCY	Quantity	Primary Sales	Acting Sales
Date 📅									Search 🔍	Search	Filter row
06.38 03-Feb-22	OD411615	⚠ Quoted	Client 1	AAPL	Equity Option	100	USD	1,200	Test Sales	Test Sales	Selected row
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

Blotter content

Specs

4   18   8

200px wide

6   18   4   4

| My | My Clients | All | | + Add Filter | Reset | | Group by | Add group | | 🔽 | ⚙ |

4

Created	Reference	Status	Client	Underlying	Product	Notional	CCY	Quantity	Primary Sales	Acting Sales
Date 📅									Search 🔍	Search
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				

4   4   4   3

Meerkat - Grouping treatment
Grouping panel

Grouping panel view

| My | My Clients | All | | ➕ Add Filter | Reset |

Group by | Add group | 🔽 ⚙

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

Dropdown (Group by):
Created
Reference
Status
Client
Underlying
Product
Notional

Test Sales

170px height

Rollover state

Created
Reference
Status
Client
Underlying
Product
Notional

Input field - default

Add group

Created
Reference
Status
Client
Underlying
Product
Notional

Input field - active progress

Sta| ◯

Created
Reference
Status
Client
Underlying
Product
Notional

Input field - added pill

Status ✕ | Add group | ✕

Created
Reference
Client
Underlying
Product
Notional
CCY

Input field - pill with active progress

Status ✕ | Sta| ◯ ✕

Created
Reference
Client
Underlying
Product
Notional
CCY

Input field - maximum pills

Status ✕ | Client ✕ | ➕ 2 | ✕

Created
Reference
Underlying
Product
Quantity
Primary Sales
Acting Sales

Input field - maximum pills dropdown

Status ✕ | Client ✕ | ➕ 2 | ✕

Notional	✕
CCY	✕

Meerkat - Grouping treatment

Grouping blotter layout

Basic row grouping default

		Created	Reference	Status	Client	Underlying	Product	Notional	CCY	Quantity	Primary Sales	Acti
☐	⇕	Date 📅									Search 🔍	Sea
☐	>	**Open (2)**										
☐	>	**Approved (2)**										
☐	∨	**Executed (93)**										
☐	>	**Rejected (87)**										
☐	>	**Cancelled (54)**										
☐	∨	**QuoteRequested (54)**										
☐	>	**QuoteAccepted (54)**										

Persistant selection checkboxes

			Created	Reference	Status	Client	Underlying	Product	Notional	CCY	Quantity	Primary Sales	Acti
☐	⇕	⋮	Date 📅									Search 🔍	Sea
☐	>		**Open (2)**										
☐	>		**Approved (2)**										
☐	∨		**Executed (93)**										
		☐	06.38 03-Feb-22	OD411611	✓ Executed	Client 1	ART	Equity	1,000,000	USD	1,200	Test Sales	
		☐	06.38 03-Feb-22	OD411612	✓ Executed	Client 2	ART	Equity	1,000,000	USD	1,200	Test Sales	
		☐	06.38 03-Feb-22	OD411613	✓ Executed	Client 1	ART	Equity	1,000,000	USD	1,200	Test Sales	
		☐	06.38 03-Feb-22	OD411613	✓ Executed	Client 1	ART	Equity	1,000,000	USD	1,200	Test Sales	
				OD411613	✓ Executed	Client 1	ART						

⋮ → ⋮

| Ungroup by Level A |
| Ungroup by Level B |

Meerkat - Grouping treatment
Expand and collapse all controls

Control cycles between...

		Created	Reference	Status	Client	Underlying	Product	Notional	CCY	Quantity	Primary Sales	Acti
☐	⇕											
		Date 📅									Search 🔍	Sea
☐	›	**Open (2)**										
☐	›	**Approved (2)**										
☐	⌄	**Executed**										
	☐	06.38 03-Feb-22	OD411611	✓ Executed	Client 1	ART	Equity	1,000,000	USD	1,200	Test Sales	
	☐	06.38 03-Feb-22	OD411612	✓ Executed	Client 2	ART	Equity	1,000,000	USD	1,200	Test Sales	
		06.38 03-Feb-22	OD411613	✓ Executed	Client 1	ART	Equity					

⇕ ———→ **expanding all...**

		Created	Reference	Status	Client	Underlying	Product	Notional	CCY	Quantity	Primary Sales	Acti
☐	⥮											
		Date 📅									Search 🔍	Sea
☐	⌄	**Open (2)**										
☐		06.38 03-Feb-22	OD411611	✓ Executed	Client 1	ART	Equity	1,000,000	USD	1,200	Test Sales	
☐		06.38 03-Feb-22	OD411612	✓ Executed	Client 2	ART	Equity	1,000,000	USD	1,200	Test Sales	
☐	⌄	**Approved (2)**										
	☐	06.38 03-Feb-22	OD411611	✓ Executed	Client 1	ART	Equity	1,000,000	USD	1,200	Test Sales	
	☐	06.38 03-Feb-22	OD411612	✓ Executed	Client 2	ART	Equity	1,000,000	USD	1,200	Test Sales	
☐	⌄	**Executed (93)**										
	☐	06.38 03-Feb-22	OD411611	✓ Executed	Client 1	ART	Equity	1,000,000	USD			

⥮ ———→ **collapsing all...**

		Created	Reference	Status	Client	Underlying	Product	Notional	CCY	Quantity	Primary Sales	Acti
☐	⇕											
		Date 📅									Search 🔍	Sea
☐	›	**Open (2)**										
☐	›	**Approved (2)**										
☐	⌄	**Executed (93)**										

Meerkat - Grouping treatment

Selection

A. Whole group

		Created	Reference	Status	Client	Underlying
▬	⇕	Date				
☐	⌄	**Open (2)**				
☐		06.38 03-Feb-22	OD411611	✅ Executed	Client 1	ART
☐		06.38 03-Feb-22	OD411612	✅ Executed	Client 2	ART
☑	⌄	**Approved (54)**				
☑		06.38 03-Feb-22	OD411611	✅ Executed	Client 1	ART
☑		06.38 03-Feb-22	OD411612	✅ Executed	Client 2	ART
☑		06.38 03-Feb-22	OD411611	✅ Executed	Client 1	ART
☑		06.38 03-Feb-22	OD411612	✅ Executed	Client 2	ART
☑		06.38 03-Feb-22	OD411613	✅ Executed	Client 1	ART

B. Partial group

		Created	Reference	Status	Client	Underlying
▬	⇕	Date				
☐	⌄	**Open (2)**				
☐		06.38 03-Feb-22	OD411611	✅ Executed	Client 1	ART
☐		06.38 03-Feb-22	OD411612	✅ Executed	Client 2	ART
▬	⌄	**Approved (54)**				
☑		06.38 03-Feb-22	OD411611	✅ Executed	Client 1	ART
☑		06.38 03-Feb-22	OD411612	✅ Executed	Client 2	ART
☐		06.38 03-Feb-22	OD411611	✅ Executed	Client 1	ART
☑		06.38 03-Feb-22	OD411612	✅ Executed	Client 2	ART
☑		06.38 03-Feb-22	OD411613	✅ Executed	Client 1	ART

Whole group - collapsed

		Created	Reference	Status	Client	Underlying
▬	⇕	Date				
☐	›	**Open (14)**				
☑	›	**Approved (54)**				
☐	›	**Executed (2)**				
☐	›	**Rejected (87)**				

Partial group - collapsed

		Created	Reference	Status	Client	Underlying
▬	⇕	Date				
☐	›	**Open (14)**				
▬	›	**Approved (54)**				
☐	›	**Executed (2)**				
☐	›	**Rejected (87)**				

Meerkat - Grouping treatment
Blotter specification

Basic row grouping

4   4   18 - reserved space for action menu icon

			Created	Reference	Status	Client	Underlying	Product	Notional	CCY	Quantity	Primary Sales	Acti
☐	⇕	18	Date 📅								Search 🔍	Sea
☐	>		**Open (2)**									
☐	>		**Approved (2)**									
☐	⌄		**Executed (93)**									
		☐	06.38 03-Feb-22	OD411611	✓ Executed	Client 1	ART	Equity	1,000,000	USD	1,200	Test Sales	
		☐	06.38 03-Feb-22	OD411612	✓ Executed	Client 2	ART	Equity	1,000,000	USD	1,200	Test Sales	
		☐	06.38 03-Feb-22	OD411613	✓ Executed	Client 1	ART	Equity	1,000,000	USD	1,200	Test Sales	
		☐	06.38 03-Feb-22	OD411613	✓ Executed	Client 1	ART	Equity	1,000,000	USD	1,200	Test Sales	
			OD411613		✓ Executed	Client 1	ART						

			Created	Reference	Status	Client	Underlying	Product	Notional	CCY	Quantity	Primary Sales	Acti
☐	⇕	⋮	Date 📅								Search 🔍	Sea
☐	>		**Open (2)**									
☐	>		**Approved (2)**									
☐	⌄		**Executed (93)**									
		☐	06.38 03-Feb-22	OD411611	✓ Executed	Client 1	ART	Equity	1,000,000	USD	1,200	Test Sales	
		☐	06.38 03-Feb-22	OD411616	✓ QuoteRequested	Client 2	APPL	Equity	100	USD	1,000	Test Sales	
		☐	06.38 03-Feb-22	OD411616	QuoteRequested	Client 2	APPL	Equity	100	USD	1,000	Test Sales	
		☐	06.38 03-Feb-22	OD411613	✓ Executed	Client 1	ART	Equity	1,000,000	USD	1,200	Test Sales	
			OD411613		✓ Executed	Client 1	ART						

Group title:
Frutiger Bold, 12px <Primary>

Grouped row top divider: <Mercury>

Grouped row fill: <concrete>

Standard row dividers: <concrete>

Meerkat - Grouping treatment
Blotter indentation specification

Multi-level row grouping

		Created	Reference	Status	Client	Underlying	Product	Notional	CCY	Quantity	Primary Sales	Acti
☐	↕	Date 📅									Search 🔍	Sea
☐	›	**Open (2)**										
☐	›	**Approved (2)**										
☐	⌄	**Executed (93)**										
☐	⌄	**Executed (93)**										
☐	⌄	**Group Level 2 (93)**										
☐	⌄	**Group Level 2 (93)**										
☐	⌄	**Group Level 2 (93)**										
☐		06.38 03-Feb-22	OD411611	✅ Executed	Client 1	ART	Equity	1,000,000	USD	1,200	Test Sales	
☐		06.38 03-Feb-22	OD411612	✅ Executed	Client 2	ART	Equity	1,000,000	USD	1,200	Test Sales	
☐		06.38 03-Feb-22	OD411613	✅ Executed	Client 1	ART	Equity	1,000,000	USD	1,200	Test Sales	
			OD411613	✅ Executed	Client 1	ART						

4

Standard data column

Icon area: 10h x 10w

Canvas:12h x 12w

▶ Icon rotated 90° for closed rows

Icon fill: <Tundora>