

Osprey Approach: Pivot Tables

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The latest version is always online at https://support.ospreyapproach.com/?p=35887

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You may wish to display totals for your reports in a pivot table to make them easier to read. The guide below shows a simple example to display the number of live matters each fee earner currently has for each work type, and is created using the standard Client and Matter Details view.

First, create your report as usual.

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Create your Pivot Chart

Locate a sensible place to insert the pivot chart - the Report Header or Footer can be used for example. Drag in the Pivot Grid from the Toolbox on the left:

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Select the chevron button in the top right corner of the pivot grid, and select Run Designer:

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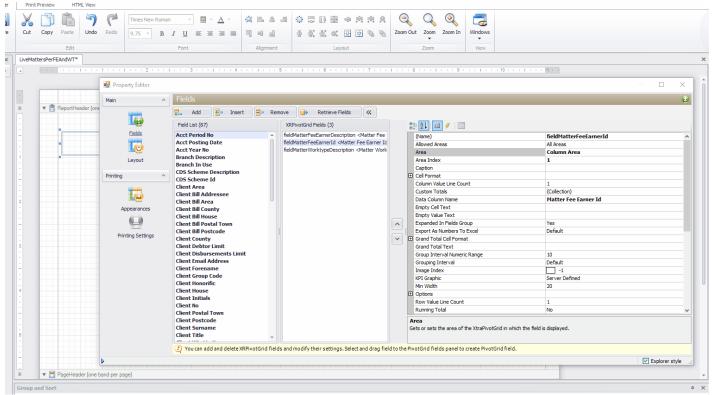
Double click the fields you want to add to your chart. In the example below, we have added the fee earner description, work type description, and the fee earner ID - the latter will be used as the data count:

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Decide whether you want your fee earners or your work types in the rows or the columns, and set them as such, by selecting the field in the centre panel then choosing the area in the right hand panel. In the example below, we have set the fee earners to show along the top of the grid (Column Area), the work types to show down the side of the grid (Row area) and the matter fee earner ID as the Data Area to

perform the counts:



Click to enlarge

Now, ensure that your Data Area field is set to the relevant summary type - in this example it will be a Count, as we wish to count the number of matters per work type/fee earner:

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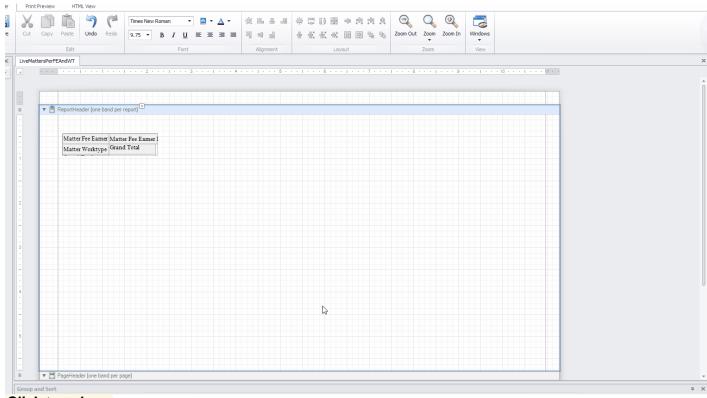
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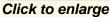
This is the base of your pivot table completed, and the resulting report should look something like this:

Matter Fee Earner	Matter Fee Earner	Description				
Matter Worktype	Benmont Tench	Mitzi Broom		Old Fee Earners	Thomas Petty	Grand Total
COLP & COFA	1					1
Conveyancing	9		10		2	21
Crime	5		6			11
Debt Recovery			1			1
Deed Storage			1			1
Employment - E			1			1
Employment - Se			1			1
Equity Release			1			1
Feedback Testing	2					2
First Registration			1			1
Global				2		2
Lasting Power of			2			2
Litigation	1		3		1	5
New Build Purch					1	1
Non Molestation	1		7			8
Part Exchange			1			1
Probate			2			2
Re-Mortgage			1			1
Residential Conv			3			3
Residential Conv			1			1
Residential Conv			1			1
Residential Conv			1			1
Transfer of Equit			1			1
Wills			3			3
Grand Total	19		48	2	4	73

Changing and improving the layout

We can see that the work types don't quite fit in the left hand column. Navigate back into the the pivot designer, select the work type column, and change the width to a larger size:





The work type description width now fits:

Matter Fee Earner Id	Matter Fee Earner	Description			
Matter Worktype Description	Benmont Tench	Mitzi Broom	Old Fee Earners	Thomas Petty	Grand Total
COLP & COFA	1				1
Conveyancing	9	10		2	21
Crime	5	6			11
Debt Recovery		1			1
Deed Storage		1			1
Employment - Employee		1			1
Employment - Settlement Agreement		1			1
Equity Release		1			1
Feedback Testing for Ben K	2				2
First Registration		1			1
Global			2		2
Lasting Power of Attorney		2			2
Litigation	1	3		1	5
New Build Purchase				1	1
Non Molestation	1	7			8
Part Exchange		1			1
Probate		2			2
Re-Mortgage		1			1
Residential Conveyancing Purchase		3			3
Residential Conveyancing Purchase Focused Workflow		1			1
Residential Conveyancing Sale		1			1
Residential Conveyancing ToE/Remortgage FW		1			1
Transfer of Equity		1			1
Wills		3			3
Grand Total	19	48	2	4	73

If you wish, you can change the colours, fonts etc. of the pivot using the Appearances menu in the Pivot Designer:

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Example below:

Matter Fee Earner Id	Matter Fee Earn	er Description			
Matter Worktype Description	Benmont Tench	Mitzi Broom	Old Fee Earners	Thomas Petty	Grand Total
COLP & COFA	1				1
Conveyancing	9	10		2	21
Crime	5	6			11
Debt Recovery		1			1
Deed Storage		1			1
Employment - Employee		1			1
Employment - Settlement Agreement		1			1
Equity Release		1			1
Feedback Testing for Ben K	2				2
First Registration		1			1
Global			2		2
Lasting Power of Attorney		2			2
Litigation	1	3		1	5
New Build Purchase				1	1
Non Molestation	1	7			8
Part Exchange		1			1
Probate		2			2
Re-Mortgage		1			1
Residential Conveyancing Purchase		3			3
Residential Conveyancing Purchase Focused Workfl		1			1
Residential Conveyancing Sale		1			1
Residential Conveyancing ToE/Remortgage FW		1			1
Transfer of Equity		1			1
Wills		3			3
Grand Total	19	48	2	4	73

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Appearance areas explained

Area Name	Where does it affect					
Cell	Matter Fee Earner Id	Matter Fee Earner	r Description			
	Matter Worktype Description	Benmont Tench	Mitzi Broom	Old Fee Earners	Thomas Petty	Grand Total
	COLP & COFA	1				1
	Conveyancing	9	10		2	21
	Crime	5	6			11
	Debt Recovery		1			1
	Deed Storage		1			1
	Employment - Employee		1			1
	Employment - Settlement Agreement		1			1
	Equity Release					1
	Feedback Testing for Ben K	2				2
	First Registration		1			1
	Global			2		2
			2			
	Lasting Power of Attorney					2
	Litigation	1	3		1	
	New Build Purchase				1	1
	Non Molestation	1	7			8
	Part Exchange		1			1
	Probate		2			2
	Re-Mortgage		1			1
	Residential Conveyancing Purchase		3			3
	Residential Conveyancing Purchase Focused Workfl		1			1
	Residential Conveyancing Sale		1			1
	Residential Conveyancing ToE/Remortgage FW		1			1
	Transfer of Equity		1			1
	Wills		3			3
	Grand Total	19	48	2	4	73
FieldHeader	Matter Fee Earner Id	Matter Fee Earn	er Description			
	Matter Worktype Description	Benmont Tench	Mitzi Broom	Old Fee Earner	s Thomas Petty	Grand Total
	COLP & COFA	1	1			1
	Conveyancing	9	1	0		2 21
	Crime	5	5	6		11
	Debt Recovery			1		1
	Deed Storage			1		1
	Employment - Employee			1		1
	Employment - Settlement Agreement			1		1
	Equity Release			1		1
	Feedback Testing for Ben K	2	2			2
	First Registration			1		1
	Global	1			2	2
	Lusting Power of Attorney	1		2	1	2
	Litigation	1		3		1 5
	New Build Purchase	+		1		1 1
	Non Molestation	1	1	7		
	Part Exchange	· · ·		1		1
	Probate	+		2		
		+		1		1
	Re-Mortgage	+		3		3
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FieldValue	Matter Fee Earner Id	Matter Fee Earner	r Description			
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	COLP & COFA	1				1
	Conveyancing	9	10		2	21
	Crime	5	6			11
	Debt Recovery		1			1
	Deed Storage		1			1
	Employment - Employee		1			1
	Employment - Settlement Agreement		1			1
	Equity Release		1			1
	Feedback Testing for Ben K	2				2
	First Registration	-	1			1
	Global			2		2
			2	4		2
	Lasting Power of Attorney					5
	Litigation	1	3		1	
	New Build Purchase				1	1
	Non Molestation	1	7			8
	Part Exchange		1			1
	Probate		2			2
	Re-Mortgage		1			1
	Residential Conveyancing Purchase		3			3
	Residential Conveyancing Purchase Focused Workfi		1			1
	Residential Conveyancing Sale		1			1
	Residential Conveyancing ToE/Remortgage FW		1			1
	Transfer of Equity		1			1
	Wills		3			3
	Grand Total	19	48	2	4	73
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FieldValueGrandTotal	Matter Fee Earner Id	Matter Fee Earr	ner Description			
	Matter Worktype Description	Benmont Tench	Mitzi Broom	Old Fee Earners	Thomas Petty	Grand Total
	COLP & COFA					
	COLF & COTA		1			1
	Conveyancing	5	1 9 1	0		2 21
				0		
	Conveyancing Crime		5			2 21
	Conveyancing Crime Debt Recovery		5	6		2 21
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	Conveyancing Crime Debt Recovery Deed Storage Employment - Employee Employment - Settlement Agreement		5	6 1 1 1 1		2 21 11 1 1
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	Conveyancing Crime Debt Recovery Deed Storage Employment - Employee Employment - Settlement Agreement Equity Release Feedback Testing for Ben K First Registration Clobal Lasting Power of Attorney Litigation New Build Purchase Non Molestation Part Exchange Probate Re-Mortgage Residential Conveyancing Purchase		5	6 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1		2 211 111 11 11 11 11 11 12 11 11 11 11 11
	Conveyancing Crime Debt Recovery Deed Storage Employment - Employee Employment - Settlement Agreement Equity Release Feedback Testing for Ben K First Registration Clobal Lasting Power of Attorney Litigation New Build Purchase Non Molestation Part Exchange Probate Re-Mortgage Residential Conveyancing Purchase Residential Conveyancing Purchase		5	6 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1		2 211 111 11 11 11 11 11 12 11 12 11 11 11
	Conveyancing Crime Debt Recovery Deed Storage Employment - Employee Employment - Settlement Agreement Equity Release Feedback Testing for Ben K First Registration Clobal Lasting Power of Attorney Litigation New Build Purchase Non Molestation Part Exchange Probate Re-Mortgage Residential Conveyancing Purchase Residential Conveyancing Sale Residential Conveyancing ToE/Remortgage FW		5 2 2 1 1 1 1 1 1 1 1 1 1 1 1 1	6 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1		2 211 111 11 11 11 11 11 12 11 12 11 11 11
	Conveyancing Crime Debt Recovery Deed Storage Employment - Employee Employment - Settlement Agreement Equity Release Feedback Testing for Ben K First Registration Clobal Lasting Power of Attorney Litigation New Build Purchase Non Molestation Part Exchange Probate Re-Mortgage Residential Conveyancing Purchase Residential Conveyancing Sale Residential Conveyancing ToE/Remortgage FW Transfer of Equity		5	6 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1		2 211 111 11 11 11 11 11 12 11 12 11 11 11
	Conveyancing Crime Debt Recovery Deed Storage Employment - Employee Employment - Settlement Agreement Equity Release Feedback Testing for Ben K First Registration Clobal Lasting Power of Attorney Litigation New Build Purchase Non Molestation Part Exchange Probate Re-Mortgage Residential Conveyancing Purchase Residential Conveyancing Sale Residential Conveyancing ToE/Remortgage FW		5	6 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1		2 211 111 11 11 11 11 11 12 11 12 11 11 11

GrandTotalCell	Matter Fee Earner Id	Matter Fee Earne	r Description			
er and i otaricen	Matter Worktype Description	Benmont Tench	Mitzi Broom	Old Fee Earners	Thomas Petty	Grand Total
	COLP & COFA	1				1
	Conveyancing	9	10		2	21
	Crime	5				11
	Debt Recovery		1			1
	Deed Storage		1			1
	Employment - Employee		1			1
	Employment - Settlement Agreement		1			
	Equity Release		1			
	Feedback Testing for Ben K	2				2
	First Registration	4	1			2
	Global			2		2
	Lasting Power of Attorney		2			2
	Litigation	1	3		1	5
	New Build Purchase				1	
	Non Molestation	1				5
	Part Exchange		1			1
	Probate		2			2
	Re-Mortgage		1			1
	Residential Conveyancing Purchase		3			3
	Residential Conveyancing Purchase Focused Workfl		1			1
	Residential Conveyancing Sale		1			1
	Residential Conveyancing ToE/Remortgage FW		1			1
	Transfer of Equity		1			1
	Wills		3			3
	Grand Total	19		2	4	73
				-		
Lines	Matter Fee Earner Id		mer Description	0115 5	-	a
	Matter Worktype Description		h Mitzi Broom	Old Fee Earn	ers Thomas Pett	y Grand Tota
	COLP & COFA		1			
	Conveyancing		9	10		2
	Crime		5	6		
	Debt Recovery			1		
	Deed Storage			1		
	Employment - Employee			1		
	Employment - Settlement Agreement			1		
	services and a second service set			-		
	Fourity Release			1		
	Equity Release Facilitatic for Ban V			1		
	Feedback Testing for Ben K		2			
	Feedback Testing for Ben K First Registration		2	1		
	Feedback Testing for Ben K First Registration Global		2	1	2	
	Feedback Testing for Ben K First Registration Global Lasting Power of Attorney			1	2	
	Feedback Testing for Ben K First Registration Global Lasting Power of Attorney Litigation		2	1	2	1
	Feedback Testing for Ben K First Registration Global Lasting Power of Attorney			1	2	1
	Feedback Testing for Ben K First Registration Global Lasting Power of Attorney Litigation			1	2	-
	Feedback Testing for Ben K First Registration Global Lasting Power of Attorney Litigation New Build Purchase		1	2 3	2	-
	Feedback Testing for Ben K First Registration Global Lasting Power of Attorney Litigation New Build Purchase Non Molestation		1	1 2 3 7	2	-
	Feedback Testing for Ben K First Registration Global Lasting Power of Attorney Litigation New Build Purchase Non Molestation Part Exchange Probate		1	1 2 3 7 1 2	2	-
	Feedback Testing for Ben K First Registration Global Lasting Power of Attorney Litigation New Build Purchase Non Molestation Part Exchange Probate Re-Mortgage		1	1 2 3 7 1 2 1	2	-
	Feedback Testing for Ben K First Registration Global Lasting Power of Attorney Litigation New Build Purchase Non Molestation Part Exchange Probate Re-Mortgage Residential Conveyancing Purchase		1	1 2 3 7 1 2 1 3	2	-
	Feedback Testing for Ben K First Registration Global Lasting Power of Attorney Litigation New Build Purchase Non Molestation Part Exchange Probate Re-Mortgage Residential Conveyancing Purchase Residential Conveyancing Purchase		1	1 2 3 7 1 2 1 3 1	2	-
	Feedback Testing for Ben K First Registration Global Lasting Power of Attorney Litigation New Build Purchase Non Molestation Part Exchange Probate Re-Mortgage Residential Conveyancing Purchase Residential Conveyancing Sale		1	1 2 3 7 1 2 1 3 1 1 1	2	-
	Feedback Testing for Ben K First Registration Global Lasting Power of Attorney Litigation New Build Purchase Non Molestation Part Exchange Probate Re-Mortgage Residential Conveyancing Purchase Residential Conveyancing Sale Residential Conveyancing Sale Residential Conveyancing Sale		1	1 2 3 7 1 2 1 3 1 1 1 1	2	-
	Feedback Testing for Ben K First Registration Global Lasting Power of Attorney Litigation New Build Purchase Non Molestation Part Exchange Probate Re-Mortgage Residential Conveyancing Purchase Residential Conveyancing Sale Residential Conveyancing Sale Residential Conveyancing ToE/Remortgage FW Transfer of Equity		1	1 2 3 7 1 2 1 3 1 1 1 1 1 1	2	-
	Feedback Testing for Ben K First Registration Global Lasting Power of Attorney Litigation New Build Purchase Non Molestation Part Exchange Probate Re-Mortgage Residential Conveyancing Purchase Residential Conveyancing Sale Residential Conveyancing Sale Residential Conveyancing Sale		1	1 2 3 7 1 2 1 3 1 1 1 1	2	-

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