Osprey Approach: Pivot Tables

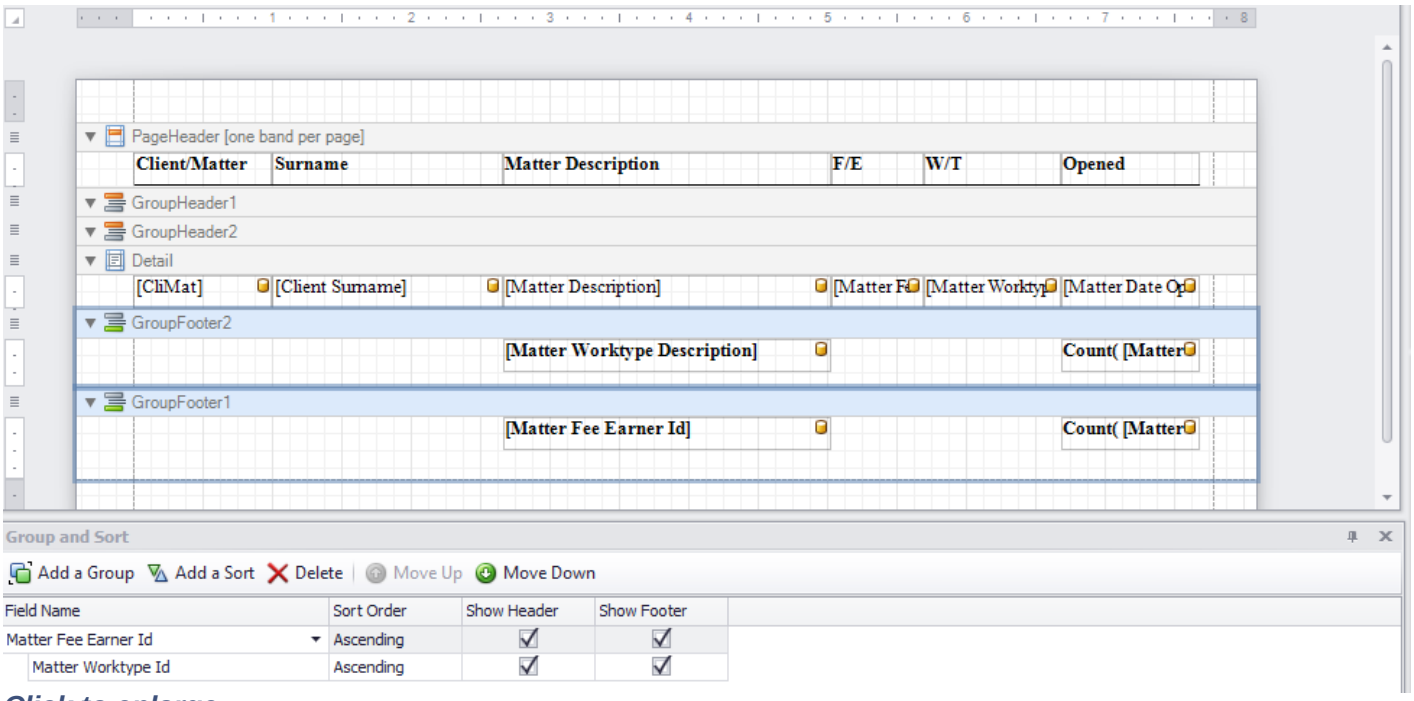
This help guide was last updated on
Jan 24th, 2023

The latest version is always online at
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Osprey™ Approach

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.

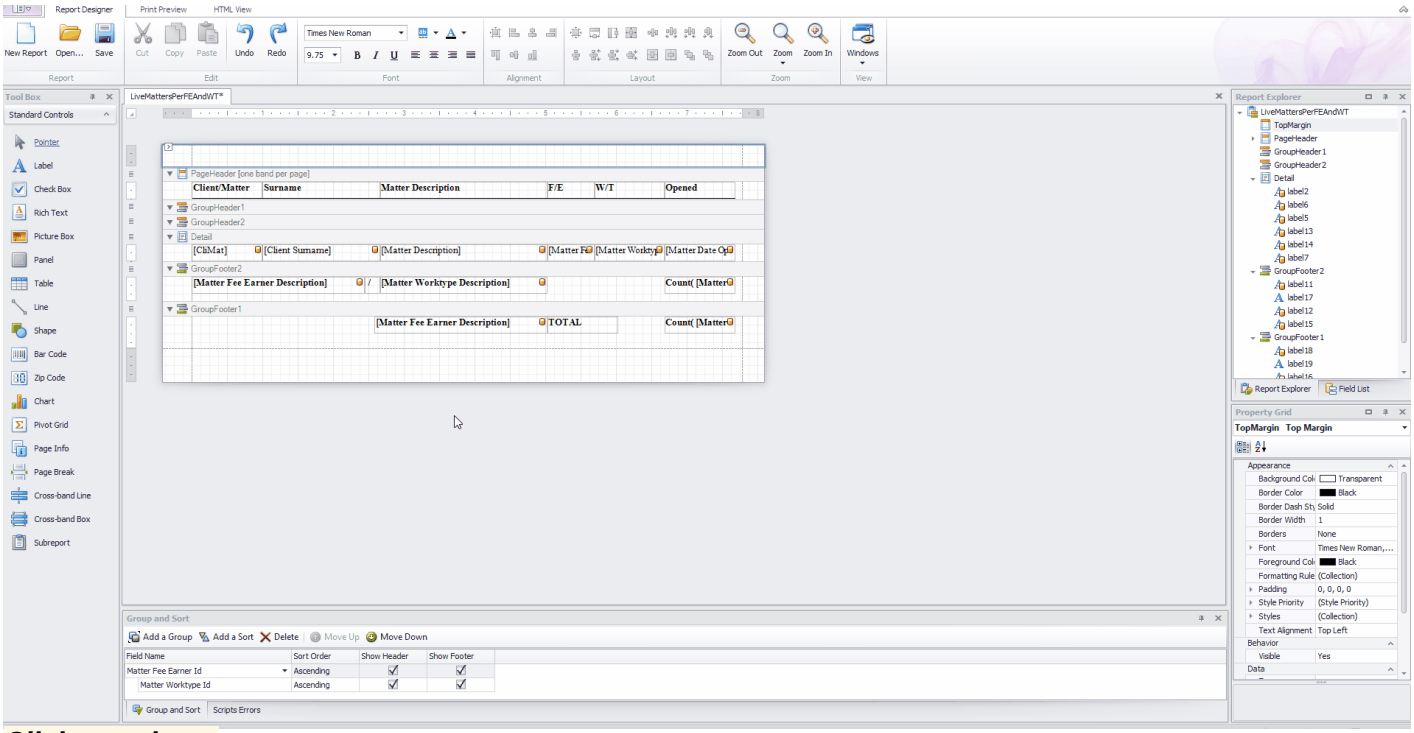
First, create your report as usual.



Click to enlarge

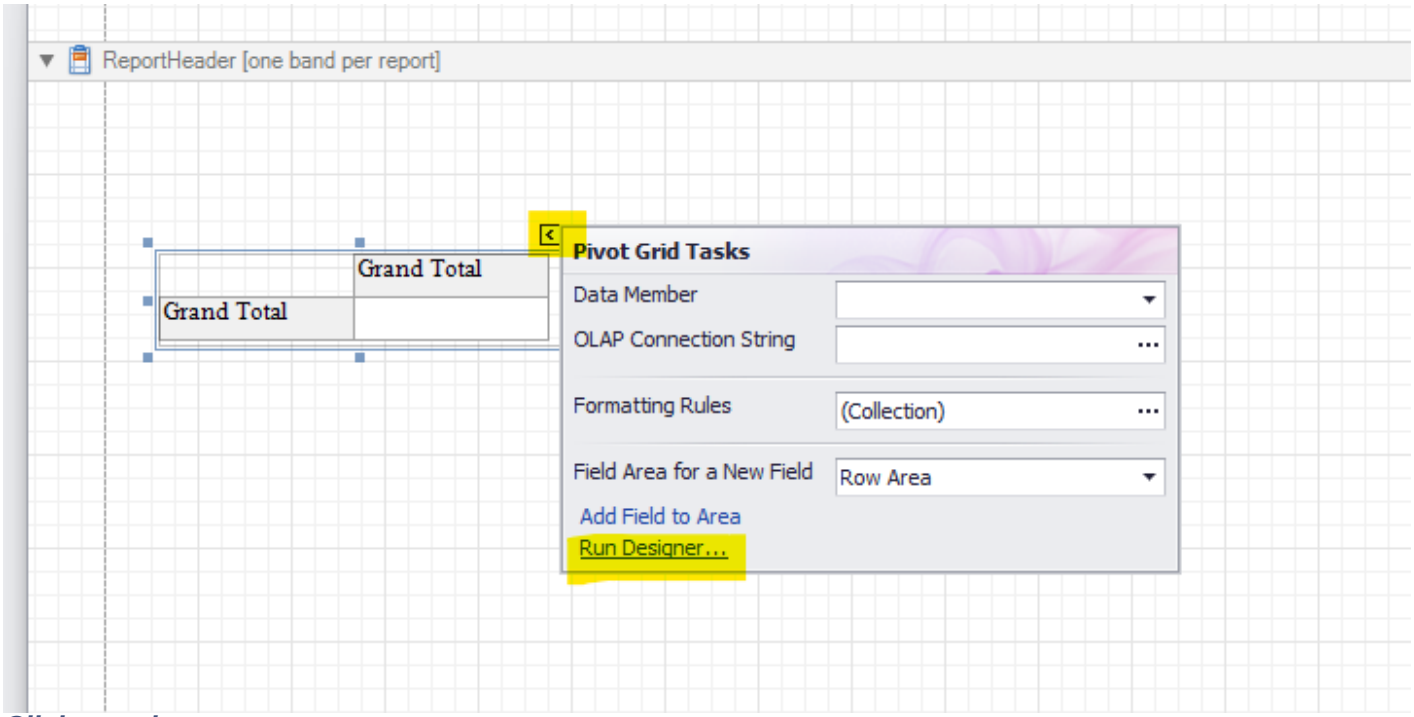
Create your Pivot Chart

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:



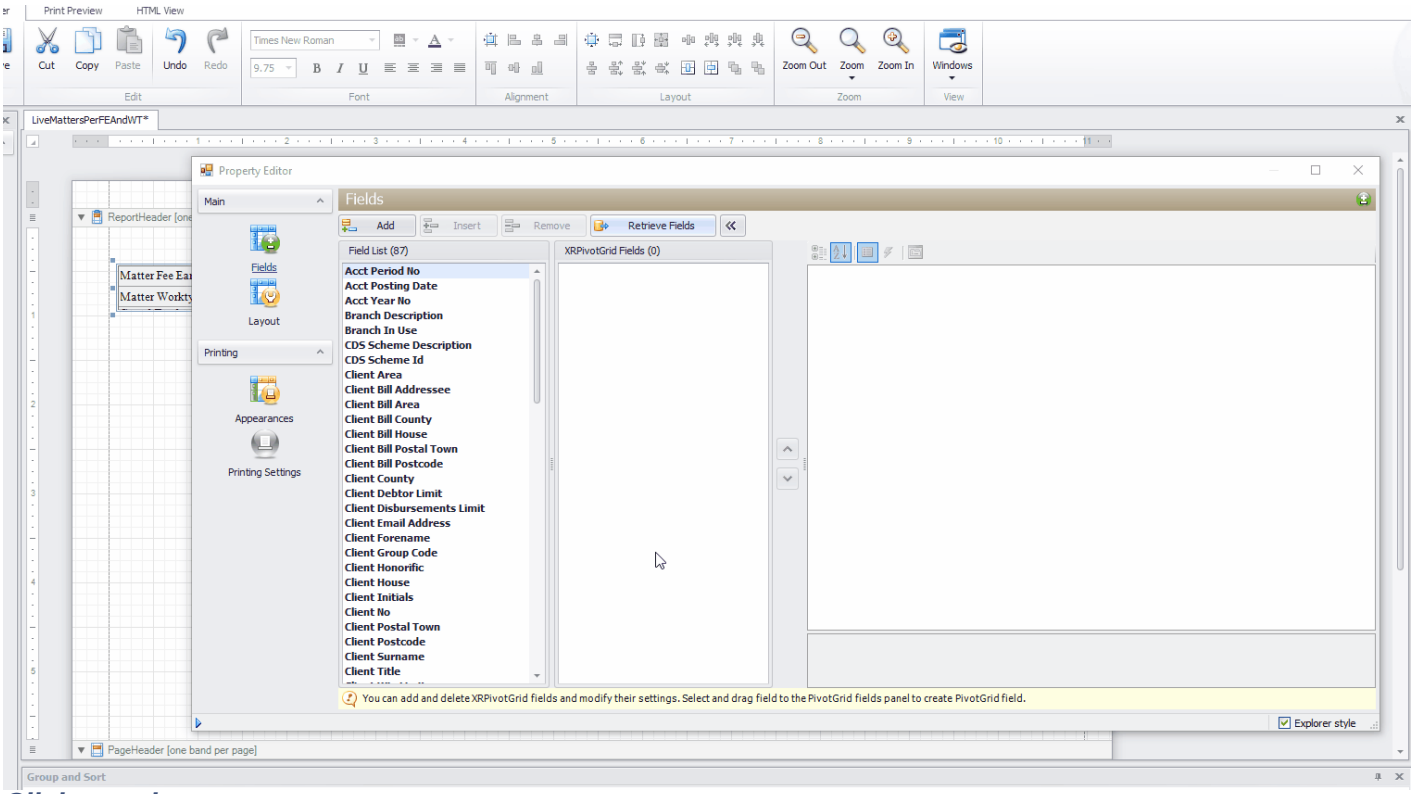
Click to enlarge

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



Click to enlarge

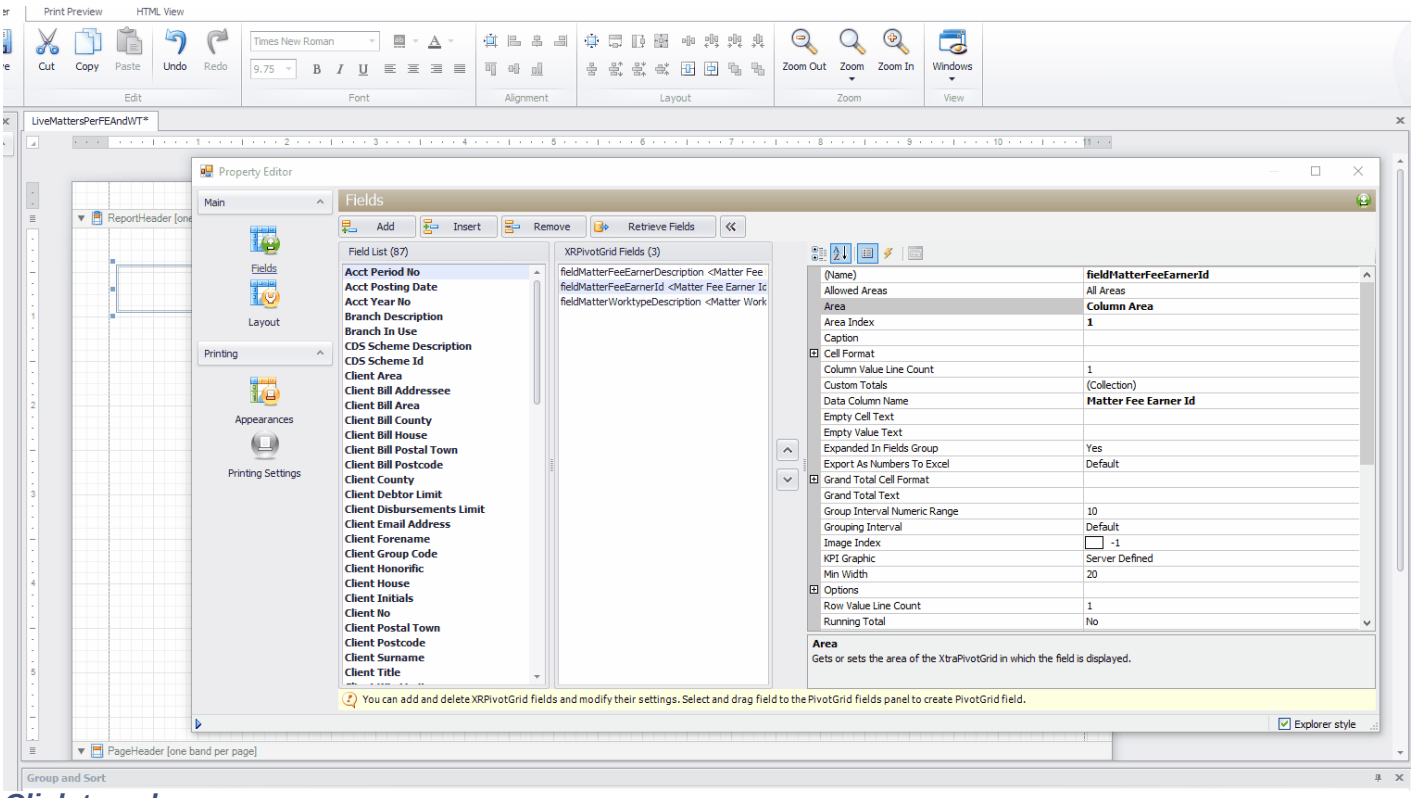
Double click the fields you want to add to your chart. In the example below, we have added the fee earner description, work type description, and the fee earner ID - the latter will be used as the data count:



Click to enlarge

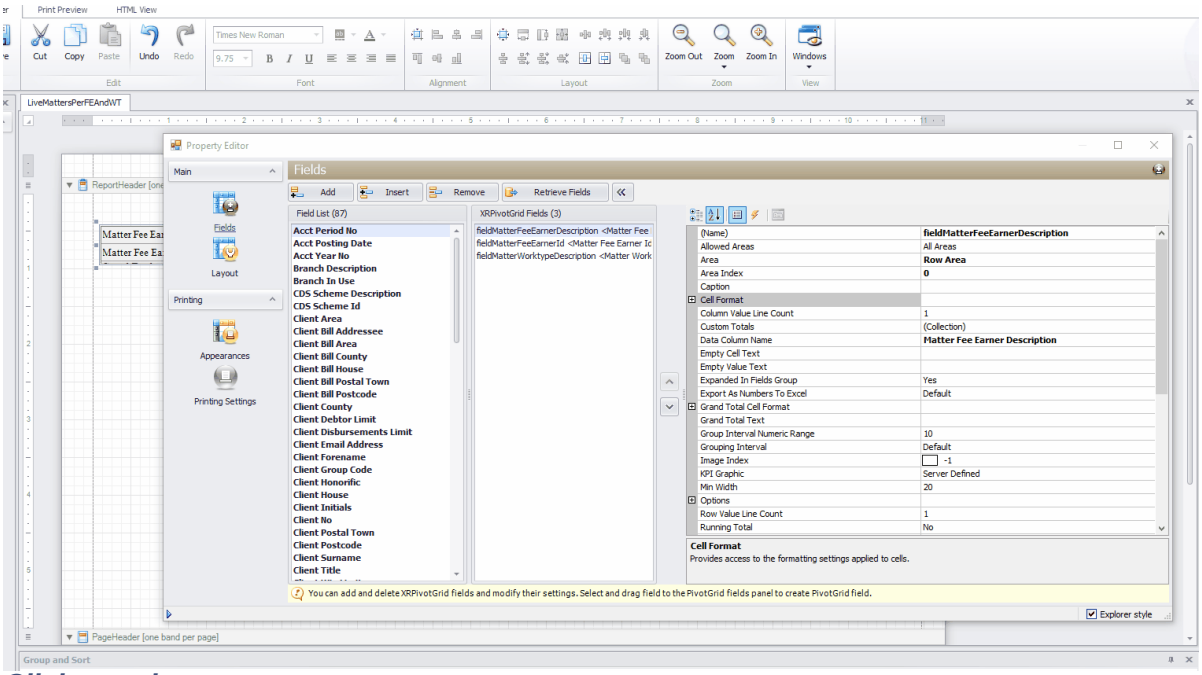
Decide whether you want your fee earners or your work types in the rows or the columns, and set them as such, by selecting the field in the centre panel then choosing the area in the right hand panel. In the example below, we have set the fee earners to show along the top of the grid (Column Area), the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



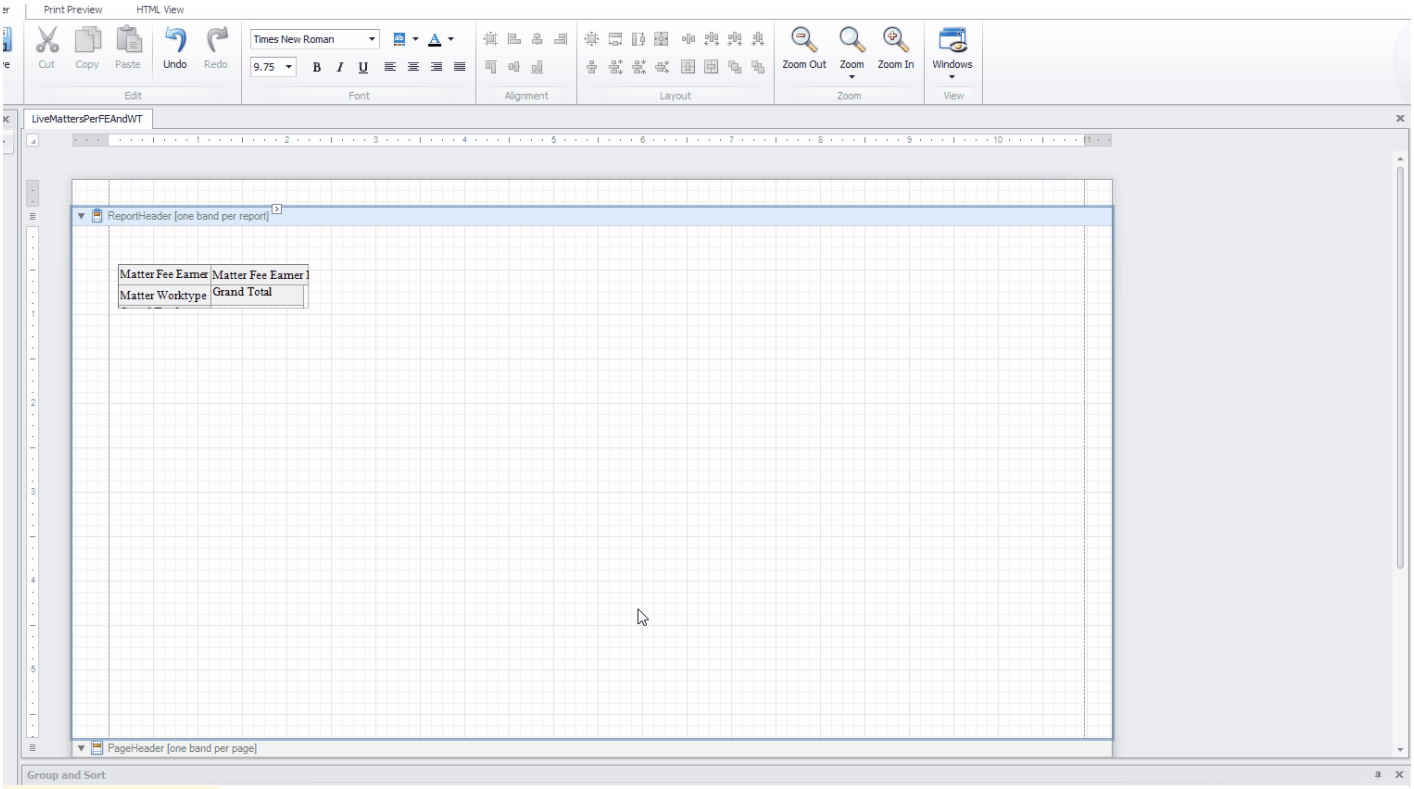
Click to enlarge

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:

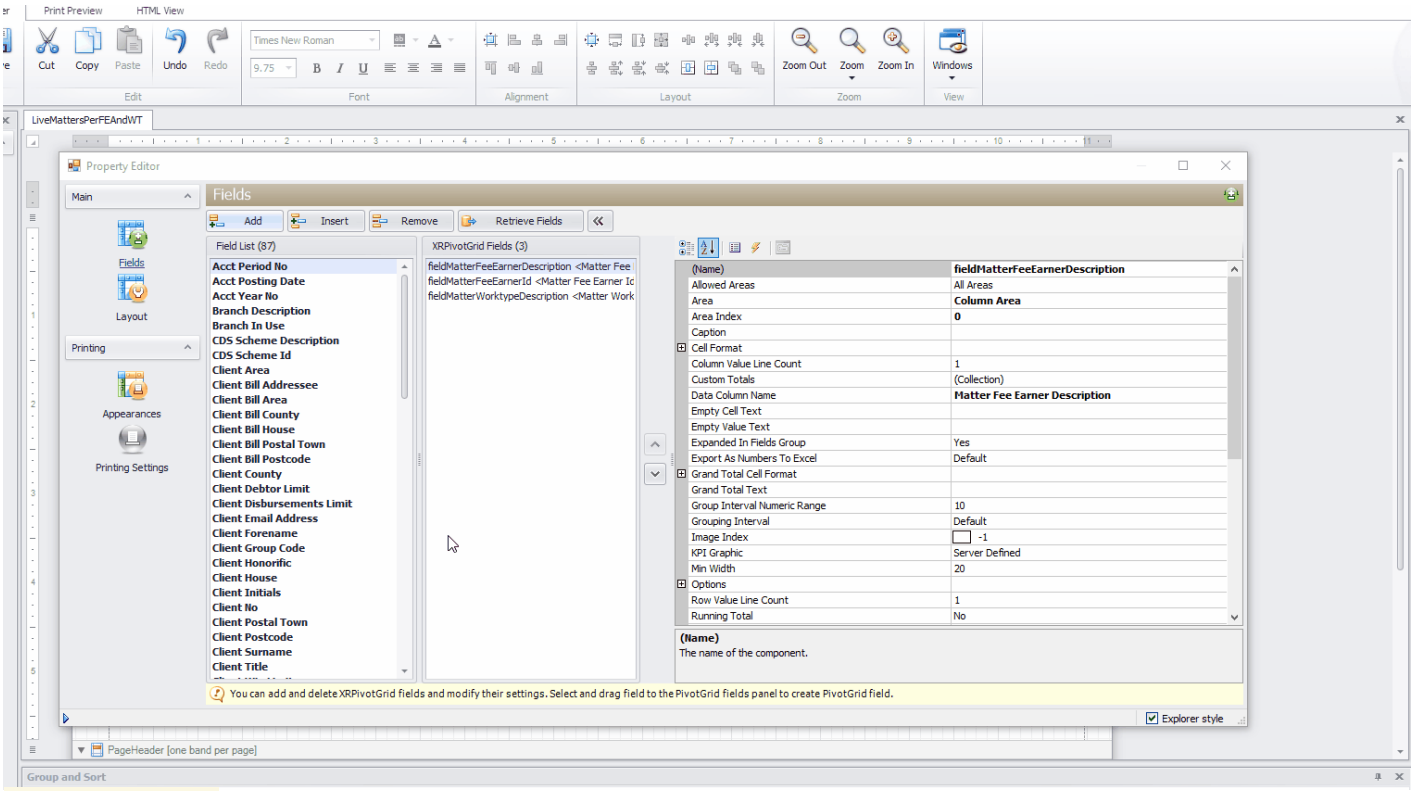


Click to enlarge

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:



Click to enlarge

Example below:

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 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

Click to enlarge

Appearance areas explained

Area Name	Where does it affect

Cell

Matter Fee Earner Id	Matter Fee Earner Description				
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Employment - Employee		1			1
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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
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FieldHeader

Matter Fee Earner Id	Matter Fee Earner Description				
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Feedback Testing for Ben K	2				2
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Residential Conveyancing Purchase		3			3
Residential Conveyancing Purchase Focused Workfl		1			1
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Residential Conveyancing ToE/Remortgage FW		1			1
Transfer of Equity		1			1
Wills		3			3
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FieldValue

Matter Fee Earner Id	Matter Fee Earner Description				
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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
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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

FieldValueGrandTotal

Matter Fee Earner Id	Matter Fee Earner 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
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

GrandTotalCell

Matter Fee Earner Id	Matter Fee Earner Description				
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COLP & COFA	1				1
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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

Lines

Matter Fee Earner Id	Matter Fee Earner Description				
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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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