

Osprey Approach: Sorting and Totalling Groups

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This guide will show you how to creating groups and sorts when using the Report Writer

Sometimes, you might wish to subtotal based on groups of matters, and sort that subtotal descending. A good example might be a Top Clients report which totals up the bills raised or paid by client, and sorts descending so your top client is on page 1.

Grouping your report and adding a Total field

To add a total field to a report, you must first decide whether this will be a grand total for the whole report, or a sub total for a fee earner/work type/client etc.

To add a group total, we first need to tell the report writer which field it is going to group by. The below shows a simple bills paid report:

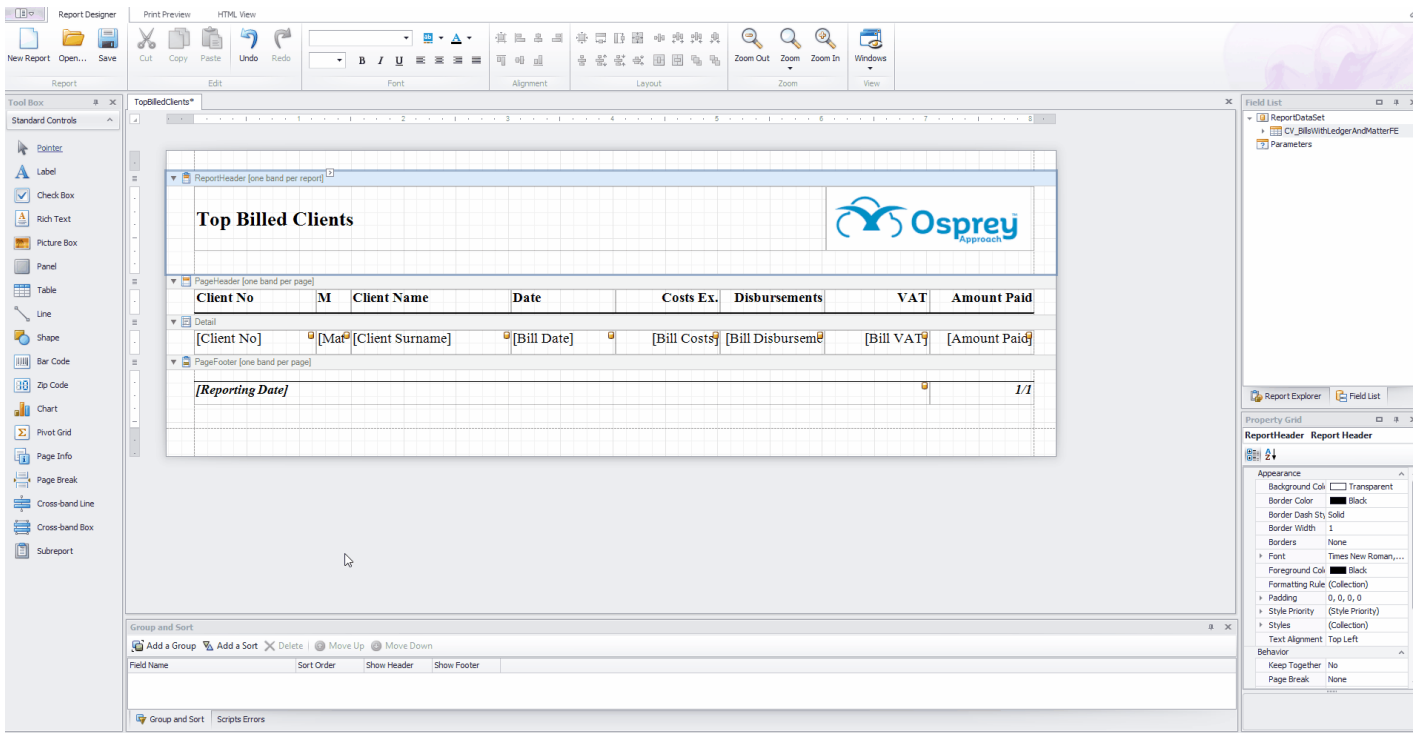
ReportHeader [one band per report]							
Top Billed Clients							
PageHeader [one band per page]							
Client No	M	Client Name	Date	Costs Ex.	Disbursements	VAT	Amount Paid
Detail							
[Client No]	[Mat]	[Client Surname]	[Bill Date]	[Bill Costs]	[Bill Disburseme]	[Bill VAT]	[Amount Paid]
PageFooter [one band per page]							
[Reporting Date]							1/1

When run, as it has no totals, the report looks like this:

Top Billed Clients								
Client No	M	Client Name	Date	Costs Ex.	Disbursements	VAT	Amount Paid	
BE0001	1	Bennett	01/06/2021	£500.00	£81.66	£116.34	£250.00	
BE0001	2	Bennett	01/03/2022	£1270.00	£2.00	£254.40	£1050.00	
BE0001	2	Bennett	16/03/2022	£0.00	£20.83	£4.17	£0.00	
BE0001	2	Bennett	26/03/2022	£500.00	£0.00	£100.00	£0.00	
BE0001	3	Bennett	08/03/2022	£1500.00	£3.00	£300.60	£0.00	
BO0001	1	Bosworth Industries	10/04/2021	£1500.00	£0.00	£300.00	£1800.00	
BO0001	2	Bosworth Industries	26/04/2021	£1500.00	£0.00	£300.00	£0.00	
BO0001	2	Bosworth Industries	26/04/2022	£895.00	£0.00	£179.00	£0.00	
BO0001	3	Bosworth Industries	26/04/2021	£1500.00	£0.00	£300.00	£0.00	
BO0001	4	Bosworth Industries	26/04/2021	£1500.00	£0.00	£300.00	£0.00	

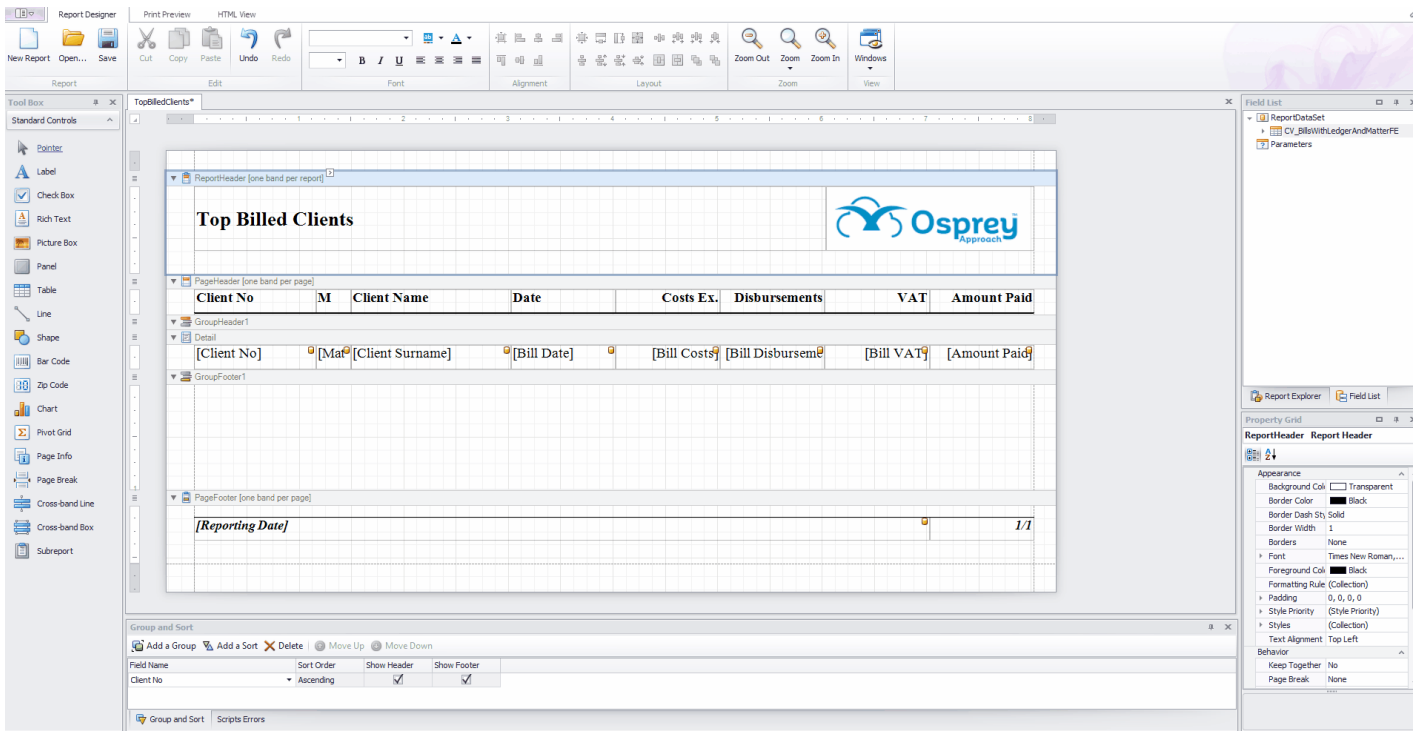
We can group the report by client, add subtotals, and order the report descending, so that the top billed client appears on the first page.

To group by Client No, click the Add a Group button at the bottom of the report writer, select Client No, and ensure that Header and Footer are both ticked. If you're not using the header, you can resize it to save space:



CLICK TO ENLARGE

Now, in the footer, copy in the field you want to total, and when selected, click the > button in the top right corner. Click the ... button alongside Summary.



CLICK TO ENLARGE

Now, select the type of summary you require, and select the Group radio button as this is a Group subtotal. In the example below, as we're grouping by Client No, we're totalling the Amount Paid for each client. Once we save this we will see that the field has changed from [Amount Paid] to SUM([Amount

Paid]]):

CLICK TO ENLARGE

When run, the report now has subtotals of Amount Paid per client:

Top Billed Clients							
Client No	M	Client Name	Date	Costs Ex.	Disbursements	VAT	Amount Paid
BE0001	1	Bennett	01/06/2021	£500.00	£81.66	£116.34	£250.00
BE0001	2	Bennett	01/03/2022	£1270.00	£2.00	£254.40	£1050.00
BE0001	2	Bennett	16/03/2022	£0.00	£20.83	£4.17	£0.00
BE0001	2	Bennett	26/03/2022	£500.00	£0.00	£100.00	£0.00
BE0001	3	Bennett	08/03/2022	£1500.00	£3.00	£300.60	£0.00
							£1300.00
BO0001	1	Bosworth Industries	10/04/2021	£1500.00	£0.00	£300.00	£1800.00
BO0001	2	Bosworth Industries	26/04/2021	£1500.00	£0.00	£300.00	£0.00
BO0001	2	Bosworth Industries	26/04/2022	£895.00	£0.00	£179.00	£0.00
BO0001	3	Bosworth Industries	26/04/2021	£1500.00	£0.00	£300.00	£0.00
BO0001	4	Bosworth Industries	26/04/2021	£1500.00	£0.00	£300.00	£0.00
							£1800.00

If you wish, you can also add a Grand Total for the report. Repeat the steps above, but putting the totalling field into the Report Footer band, and selecting the Report radio button in the Summary section:

The screenshot shows the Report Designer interface. The report is titled "Top Billed Clients" and features the Osprey Approach logo. The data table has the following structure:

Client No	M	Client Name	Date	Costs Ex.	Disbursements	VAT	Amount Paid
[Client No]	[Mat]	[Client Surname]	[Bill Date]	[Bill Costs]	[Bill Disburse]	[Bill VAT]	[Amount Paid]
							Sum([Amount Paid])

The "Group and Sort" pane at the bottom shows the following configuration:

Field Name	Sort Order	Show Header	Show Footer
Client No	Ascending	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

[CLICK TO ENLARGE](#)

Sorting the Totals

Now that you have totals on your report, you can order the group according to the group totals. In the example below, we will order the report so that the highest bill paying clients will appear on page 1 of the report.

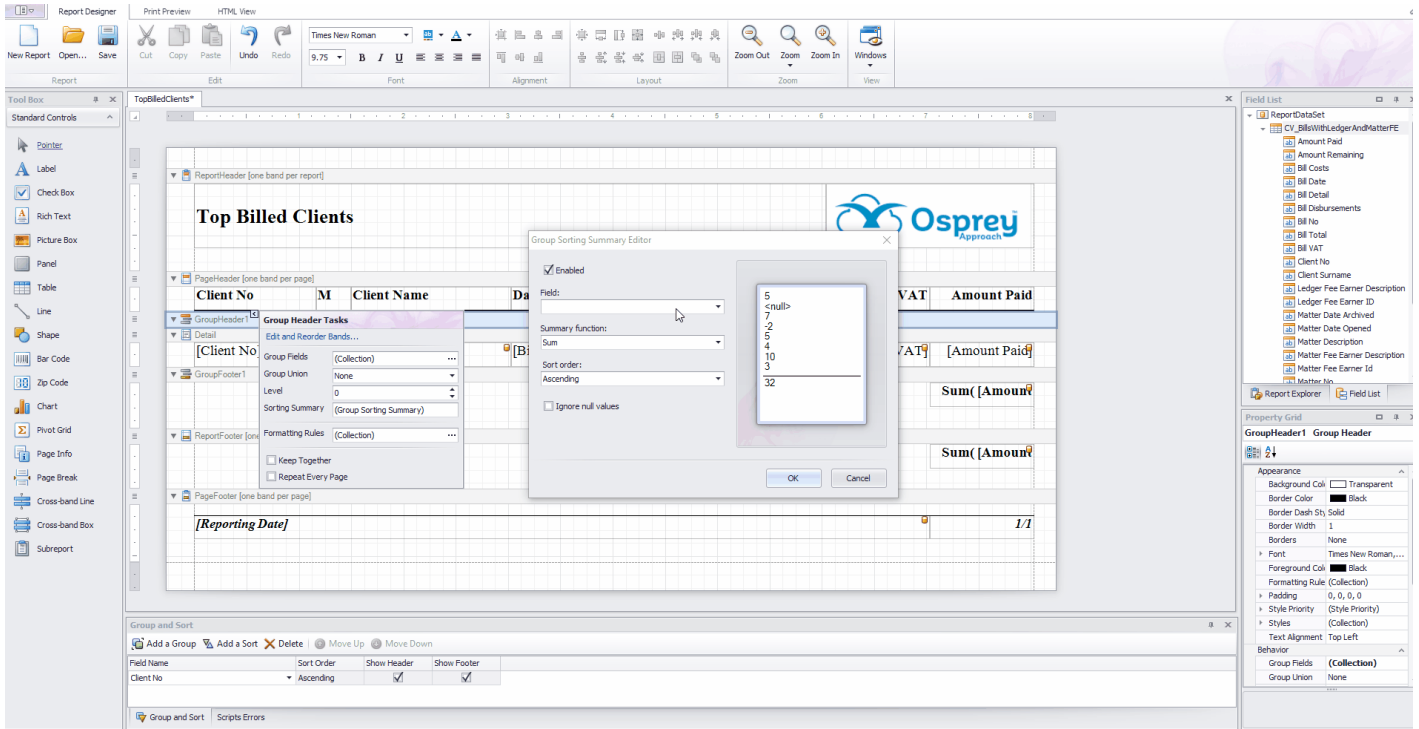
Select the Group Header band for the group which contains the total you want to sort by, locate and click the little chevron > button near the left hand edge. Select the ... button on Group Sorting Summary, and click Enable.

This screenshot shows the same report as the previous one, but with the "GroupHeader1" band selected. The "Group and Sort" pane now shows the following configuration:

Field Name	Sort Order	Show Header	Show Footer
Client No	Descending	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

[CLICK TO ENLARGE](#)

Now, in the Field box, select the field you want to use for the values to sort. In the Summary Function box, select the type of summary you want to use (this would be Count for a simple count of matters, or Sum to calculate the total of a monetary field for example). In the Sort Order box, choose Ascending or Descending. Click OK.



CLICK TO ENLARGE

The report will now total up the Amount Paid for each client, showing us the highest paying client at the start of the report:

Date	Costs Ex.	Disbursements	VAT	Amount Paid
28/02/2021	£8500.00	£0.00	£1700.00	£10200.00
				£10200.00
30/09/2021	£583.33	£0.00	£116.67	£700.00
04/12/2020	£800.00	£0.00	£160.00	£960.00
22/03/2022	£187.50	£100.00	£57.50	£0.00
10/04/2021	£500.00	£0.00	£100.00	£600.00
02/07/2021	£1016.67	£139.57	£231.25	£1387.49
26/04/2022	£850.00	£0.00	£170.00	£0.00
04/12/2020	£59.00	£0.00	£11.80	£0.00
26/04/2022	£1500.00	£0.00	£300.00	£0.00
04/12/2020	£227.00	£0.00	£45.40	£0.00
01/11/2021	£1080.00	£453.58	£306.72	£147.60
10/05/2022	£1500.00	£0.00	£300.00	£0.00
18/10/2021	£1000.00	£0.00	£200.00	£0.00
06/12/2021	£0.00	£250.00	£50.00	£276.00
06/01/2022	£230.00	£0.00	£46.00	£276.00
06/12/2021	£230.00	£0.00	£46.00	£276.00
07/03/2022	£480.00	£0.00	£96.00	£0.00
07/04/2022	£480.00	£0.00	£96.00	£576.00
25/03/2022	£500.00	£102.50	£120.50	£723.00
26/01/2022	£100.00	£0.00	£20.00	£0.00
26/03/2022	£0.00	£271.65	£4.34	£0.00
				£5922.09
30/11/2020	£250.58	£0.00	£50.12	£300.70
01/06/2021	£0.00	£350.00	£70.00	£420.00
22/03/2022	£880.94	£443.33	£264.86	£1589.13
14/09/2021	£500.00	£500.00	£200.00	£0.00
08/02/2022	£249.83	£125.00	£74.97	£449.80
08/02/2022	£273.75	£0.00	£54.75	£328.50
26/03/2022	£203.93	£0.00	£40.79	£244.72
				£3332.85

Displaying the Totals Only

You can also choose to hide the detail line so that only the group totals for a report are shown. To do this, select the Detail band on your report, and from the Report Explorer in the bottom right hand corner, set Visible to No:

TopBilledClients*

Field List

- ReportDataSet
 - CV_BillsWithLedgerAndMatterFE
 - Amount Paid
 - Amount Remaining
 - Bill Costs
 - Bill Date
 - Bill Detail
 - Bill Disbursements
 - Bill No
 - Bill Total
 - Bill VAT
 - Client No
 - Client Surname
 - Ledger Fee Earner Description
 - Ledger Fee Earner ID
 - Matter Date Archived
 - Matter Date Opened
 - Matter Description
 - Matter Fee Earner Description

Report Explorer Field List

Property Grid

Detail Detail

A Z

- Style Priority (Style Priority)
- Styles (Collection)
- Text Alignment Top Left
- Behavior
 - Keep Together No
 - Multi-Column Op (Multi-Column Opti...
 - Page Break None
 - Visible **No**
- Data
 - Sort Fields (Collection)
 - Tag

Group and Sort

Only your totals will be displayed now, in descending order:

Top Billed Clients



Client No	M	Client Name	Date	Costs Ex.	Disbursements	VAT	Amount Paid
		CLIENT SUSPENSE					£10200.00
		Broom					£5922.09
		Johnson					£3332.85
		Chan					£3084.00
		Bosworth Industries					£1800.00
		Bennett					£1300.00
		Duty					£424.32
		Court Duty Solicitor LAA claims					£355.42
		Sylar					£329.39