



Osprey Approach: Time Record on your Matters (Browser)

This help guide was last updated on
Feb 29th, 2024

The latest version is always online at
<https://support.ospreyapproach.com/?p=22676>



You can time record in several different ways within Osprey. If you are looking to record time on your Matters using the Osprey Approach app, please go to the guide at the bottom of the page.

Viewing Today's Summary

You can view the total time, value and units if time you have recorded today at any time by looking at the top of the screen.

The screenshot displays the Osprey Approach Test interface. On the left is a dark sidebar with icons for menu, eye, home, people, and clock. The main header is blue and contains the Osprey logo, today's summary statistics, and a global search bar. Below the header, a breadcrumb trail shows 'Clients & Matters' and a specific matter path. A purple 'WORKFLOW STATUS BAR' indicates 'Completed File Opening' with a table of key dates and a 'More Key Dates' dropdown. At the bottom, a 'CLIENT & MATTER SEARCH' section provides quick links for various search and communication functions.

Today's Summary	
Today's Units:	18
Today's Time:	01h:48m
Today's Value:	£184.00

Global search

Clients & Matters > 100003/1 (Wilson) FE:DAN WT:FWRCP Sale 6 Anfield Road

WORKFLOW STATUS BAR

Completed File Opening

Key Dates:	Date:	Description:	More Key Dates
[Dropdown Arrow]			

CLIENT & MATTER SEARCH

Client Search | Dossier Search | CRM Search | Send e-mail | Client Dossier | SMS

Posting a Time entry

With your required client loaded, click the Time Recording tab to navigate to the Time Ledger.



TIME RECORDING

Prospect Time Recording

Time Sheets

Time Billing

Tick Billed Time

Write Off

Print

Fee Earner Summary

Multiple Timers




Mark Ups

Transfer Time

Phase Limits


Here you will have the option to either post a single time entry or multiple time entries.

TIME LEDGER ▾


 Search |  Single Entry |  Multiple Entries

Date Filters:

From:



To:



Fee Earner

All

▼

Description

Units:

0

Time:

1 : 30

Balance:

225.00

Upon clicking Single Entry, you will be able to enter your posting details and click Post to post to the time ledger, or Save and Print to post to the time ledger and create a printable copy of the time posting.

☒ Post Time
 ☐ Create Timer

Fee Earner: MB - Mitzi Broom
 Time Keeper Grade: A

Posting Date: 08/01/2024

Remun ID: STANDARD - Standard Remuneration
 Phase / Task Code: Select

Activity: EMAIL - Send E-mail
 Activity Code: Select

Rate: 250.00 Hourly Rate

Time: 0 (mins)

Value: 0.00 [Recalculate](#)

Detail: EMAIL - Send E-mail

Attendance Note:

Include Global: ☐

You also have the option to post multiple entries if you wish. Upon clicking this, the time posting screen will list all of the available remuneration types - In the below example, we can see that there are three available for this particular worktype.

Fee Earner: MB - Mitzi Broom
 Time Keeper Grade: A

Posting Date: 08/01/2024

Remun ID: STANDARD - Standard Remuneration
 Phase / Task Code: Select

Activity Code: Select

LETOUT

Hourly Rate	Units of Time	Total
100.00	0	0.00

ADMIN

Hourly Rate	Units of Time	Total
100.00	0	0.00

EMAIL

Hourly Rate	Units of Time	Total
100.00	0	0.00

Attendance Note:

Include Global: ☐

Simply fill these in as you normally would and then click the Post button.

Accessing the Time Ledger

After posting time, users will be returned to the time ledger.

If you need to revisit the time ledger, simply click the time Time Recording heading in the navigation panel.

Printing the Time Ledger

A printable copy of the ledger can be produced by selecting print, entering any filters if required, then clicking Run.

FOCUS ON

OSPREY HOME

+

CLIENTS & MATTERS

+

TIME RECORDING

-

Prospect Time Recording

Time Sheets

+

Time Billing

+

Tick Billed Time

Write Off

+

Print

+

Fee Earning Summary

Multiple Timers

+

Mark Ups

+

Transfer Time

+

Phase Limits

CASE MANAGEMENT

+

CLIENT LEDGERS

+

NOMINAL LEDGERS

+

PURCHASE LEDGERS

+

BANKS & JOURNALS

+

Osprey

Approach

Osprey Approach Test

Today's Units: 20

Today's Time: 02h:00m

Today's Value: £216.00

Global search

Time Recording

100003 / 1 (Wilson) FE:DAN WT:FWRCP Sale 6 Anfield Road

WORKFLOW STATUS BAR

Completed File Opening

Key Dates: Date: Description: More Key Dates

CLIENT & MATTER SEARCH

Client Search | Dossier Search | CRM Search | Send e-mail | Client Dossier | SMS

Client No: 100003

Matter No: 1

Name: Wilson

Matter: Sale 6 Anfield Road

Load Client/Matter

TIME LEDGER

Search | Post

Date Filters: From: To:

Fee Earning: All

Description:

DATE	CREATED DATE	CREATED BY	DESCRIPTION	F/E	ACTIVITY	UNITS	MINS
19/12/2022	19/12/2022	dan	TRV - Travel	DAN	TRV	5	30.00
20/12/2022	20/12/2022	dan	TRV - Travel	DAN	TRV	5	30.00
20/12/2022	20/12/2022	dan	ADMIN -	DAN	ADMIN	5	30.00

A preview window will appear, allowing the user to export the report to PDF, CSV or XLS

Undoing a Time Posting

To undo a posting, click the Undo icon. A confirmation screen will appear.

WORKFLOW STATUS BAR

Completed File Opening

Key Dates: Date: Description: More Key Dates



CLIENT & MATTER SEARCH

Client Search | Dossier Search | CRM Search | Send e-mail | Client Dossier | SMS

Client No: 100003

Matter No: 1

Name: Wilson

Matter: Sale 6 Anfield Road

Load Client/Matter

TIME LEDGER

Search | Post

Date Filters: From: To:

Fee Earning: All

Description:

Units: 25

Time: 2 : 30

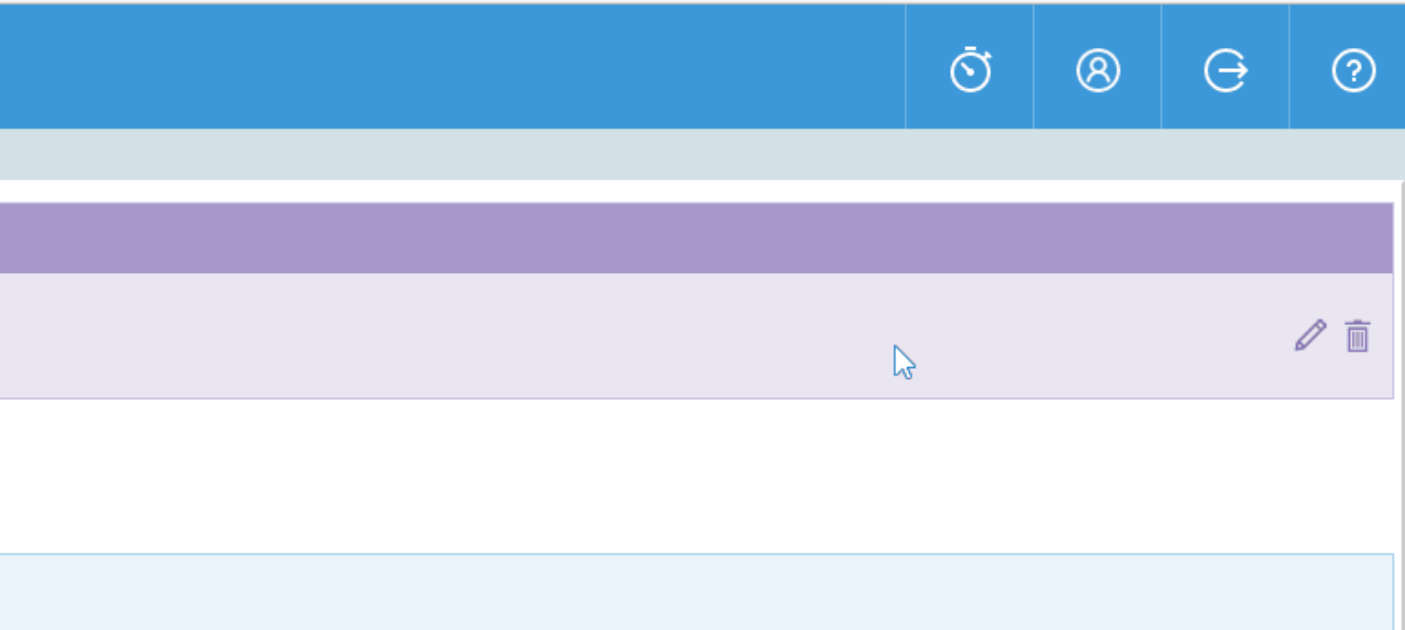
Balance: 266.00

DATE	DESCRIPTION	F/E	ACTIVITY	UNITS	RATE	VALUE	CODES	ATT NOTE	UNDO
19/12/2022	TRV - Travel	DAN	TRV	5	100.00	50.00			
20/12/2022	TRV - Travel	DAN	TRV	5	100.00	50.00			
20/12/2022	ADMIN - Administration	DAN	ADMIN	2	0.00	0.00			

Timers

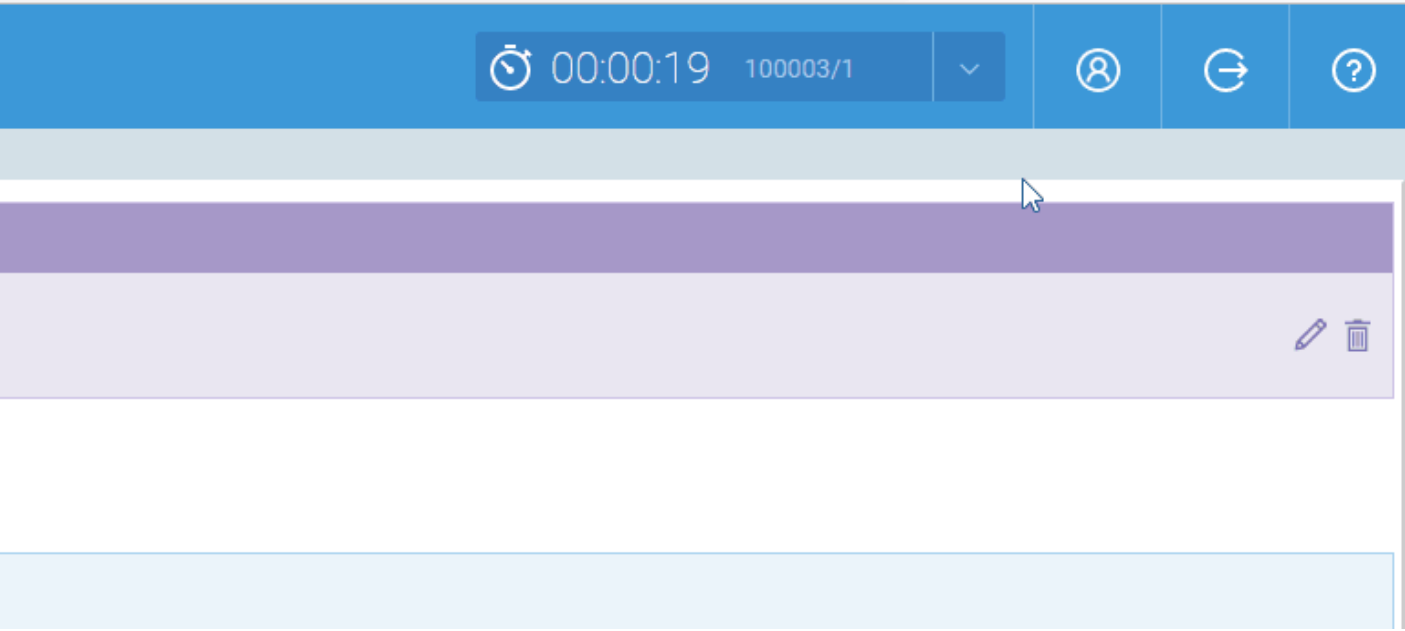
Timers allow users to accurately record how long they spend on a specific time, i.e. an online meeting or a telephone call, and can always be easily accessed.

To toggle the timer, click the Timer icon at the top right of the page.



Starting a Timer from the Timer Widget

From the Drop down, select New Timer on Current Matter to start a timer on the currently loaded matter, or New Timer on Blank Matter to select the matter at the point of posting.



Timer Options

Create timer on current matter	Starts a timer on the currently selected matter
Create timer on blank matter	Starts a timer allowing the user to select the client at the point of posting
Change timers	Allows users to swap between their unposted timers

Pause/Resume time recording	Pause/Resume the current timer
Add attendance note	Attach an attendance note to the current timer
Post time	Opens the time posting window, or if a matter is not selected, allows the user to select a matter then access the time posting window.
Collapse timer	Collapse the timer

Time Record using Smart Actions

Smart actions can also be used to create timesheets. For further information, please use the below guide.

<https://support.ospreyapproach.com/guides/smart-actions-timesheets/>

Time Record with Time Sheets

<https://support.ospreyapproach.com/guides/time-record-with-time-sheets/>