



Osprey Approach: Time Record with Timesheets

This help guide was last updated on
May 21st, 2024

The latest version is always online at
<https://support.ospreyapproach.com/?p=52760>

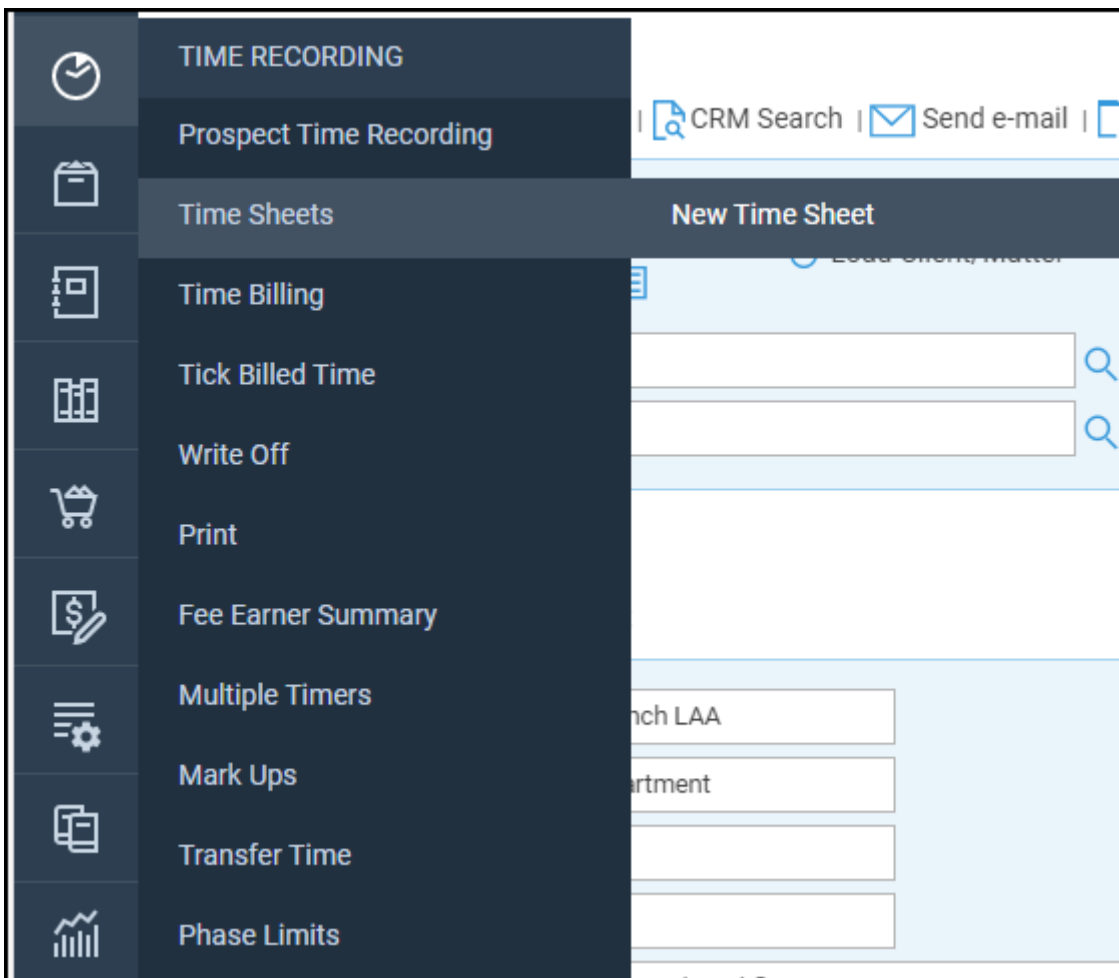


This guide will take you through using time sheets in Osprey Approach

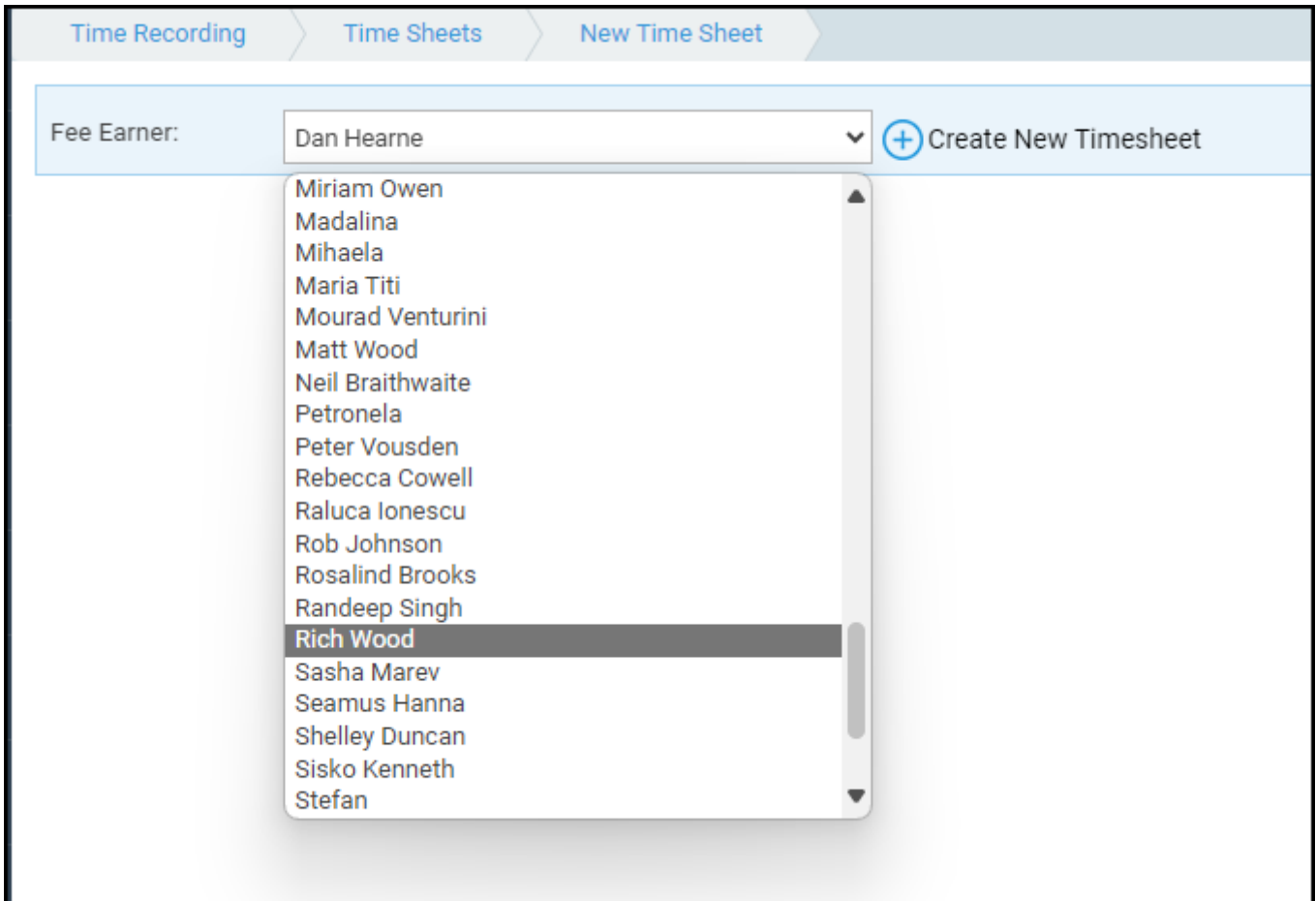
The Osprey Time Sheets function is the most efficient method for uploading multiple time entries across various clients. You can review and make amendments before posting the time to the relevant client ledgers.

Creating a Time Sheet

To create a new time Sheet, go to Time Recording > Time Sheets > New Time Sheet.

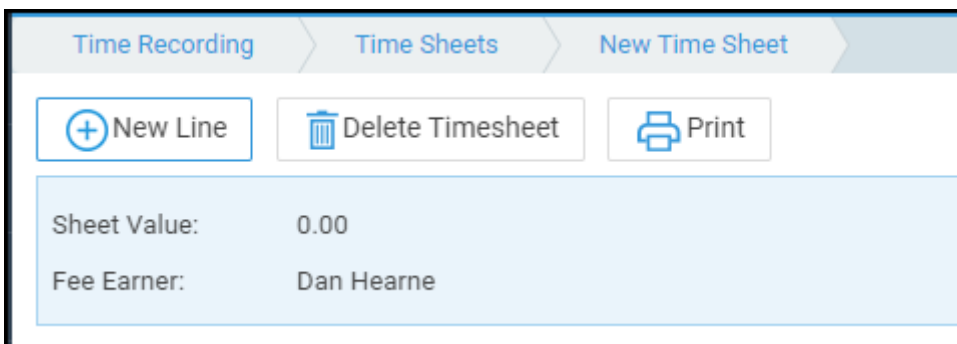


Select a Fee Earner to record time for and click Create New Timesheet.



Building the Time Sheet

When building up the time sheet, you will need to click New Line to add a new entry.





Locate the client, enter the posting details, and save.


Time Recording > Time Sheets > Edit Time Sheet


CLIENT & MATTER SEARCH ▾

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




Client No: 100003  Load Client/Matter

Matter No: 1 


Name: O'Wilson-Smith 

Matter: Purchase 6 Anfield Road 

DETAILS ▾

 Save |  Cancel |  Delete

Fee Earning: Dan Hearne


Date: 01/05/2024 

Remun ID: STANDARD - Standard Remuneration ▾

Activity: EMAILIN - Email in ▾

Rate: 200.00 Hourly Rate

Time: 2 (12 mins)

Value: 40.00  Recalculate

Description: EMAILIN - Email in

Attendance Note:




Time Keeper Grade Code: A

Phase / Task Code: Select ▾

Activity Code: Select ▾







Repeat this process as required.

Time Recording > Time Sheets > New Time Sheet

 New Line |  Delete Timesheet |  Print

Sheet Value: 228.53

Fee Earning: Dan Hearne

CLIENT NO	MAT	POSTING DATE	DESCRIPTION	UNITS	MINUTES	VALUE	ATT NOTE	EDIT
100003	1	01/05/2024	EMAILIN - Email in	2	12.00	40.00		
100003	4	01/05/2024	ADMIN - Administration	4	24.00	80.00		
100003	7	01/05/2024	CATISO Category 1 Summary Only	2	12.00	108.53		
				8	0.48	228.53		

Amending the time entries

As the time has not been posted to the ledgers yet, you are able to modify elements of the time entries.

Click the Edit icon. You can now amend the time entry, add an attendance note, or delete the entry.

If the time posting is against the incorrect client, you will need to delete and repost.

Time Recording > Time Sheets > Edit Time Sheet

DETAILS ▾

Save | Cancel | Delete

Client: 100003 : O'Wilson-Smith
Matter: 1 : Purchase 6 Anfield Road
Fee Earner: Dan Hearne

Date: 01/05/2024

Remun ID: STANDARD - Standard Remuneration ▾

Activity: EMAILIN - Email in ▾

Rate: 200.00 Hourly Rate

Time: 2 (12 mins)

Value: 40.00 Recalculate

Description: EMAILIN - Email in

Attendance Note:

Time Keeper Grade Code: A

Phase / Task Code: Select ▾

Activity Code: Select ▾

Printing and deleting the Time Sheet

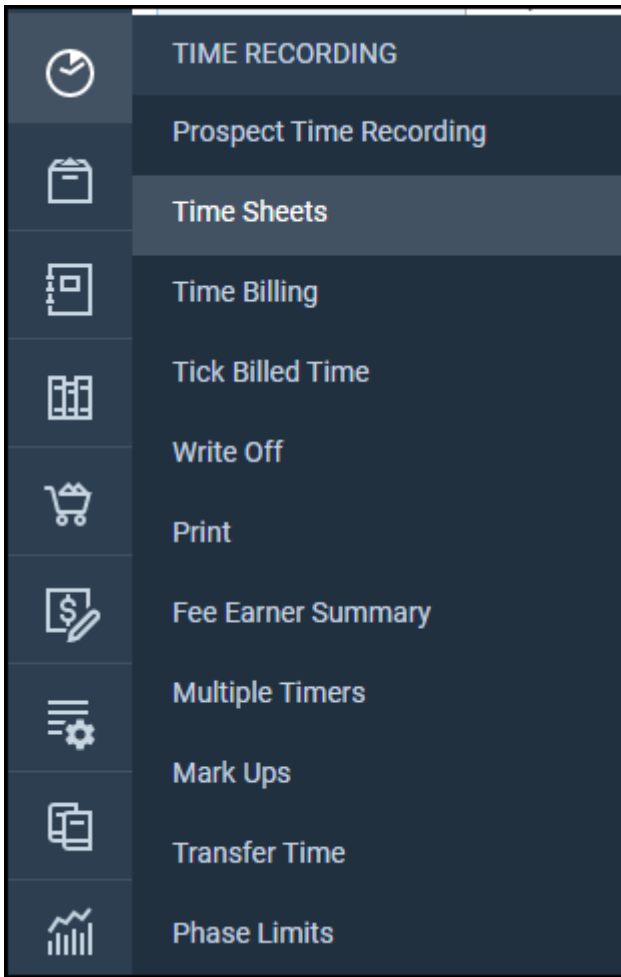
When viewing the Time Sheet, you also have options to Print or Delete

Time Recording > Time Sheets > New Time Sheet

New Line Delete Timesheet Print

Submitting the Time Sheet

Once the timesheet is ready to submit, navigate to Time Ledger > Time Sheets.



A list of all the pending timesheets are visible.

DATE CREATED	USER	FEE EARNER	SHEET VALUE	SELECT	DELETE	<input type="checkbox"/>
01/05/2024	dan	DAN	228.5300	✓		<input type="checkbox"/>

Page 1 of 1 (1 items) Page size: 10

If you wish to amend the time sheet further, click Select.

Delete will remove the time sheet.

Once the time sheet is ready to submit, tick the relevant tick box, and click Update.

DATE CREATED	USER	FEE EARNER	SHEET VALUE	SELECT	DELETE	<input checked="" type="checkbox"/>
01/05/2024	dan	DAN	228.5300	✓		<input checked="" type="checkbox"/>

Page 1 of 1 (1 items) Page size: 10

A confirmation will appear, the time sheet will disappear, and the time postings be posted onto the relevant time ledgers.

