



Osprey Approach: Time Record with Timesheets

This help guide was last updated on
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The latest version is always online at
<https://support.ospreyapproach.com/?p=52760>

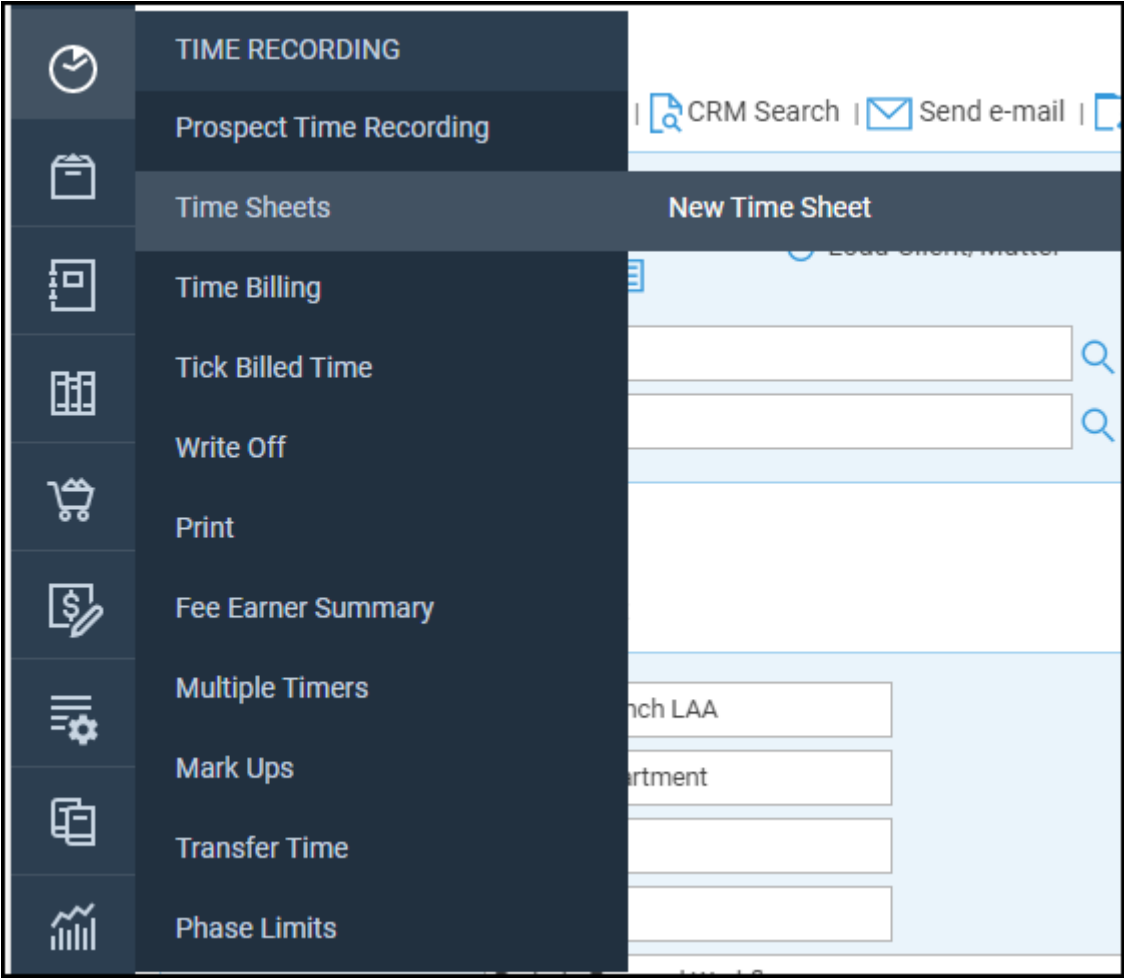


This guide will take you through using time sheets in Osprey Approach

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.

Time Recording

Time Sheets

New Time Sheet

Fee Earner:

Dan Hearne

▼

+

Create New Timesheet

Miriam Owen

Madalina

Mihaela

Maria Titi

Mourad Venturini

Matt Wood

Neil Braithwaite

Petronela

Peter Vousden

Rebecca Cowell

Raluca Ionescu

Rob Johnson

Rosalind Brooks

Randeep Singh

Rich Wood

Sasha Marev

Seamus Hanna

Shelley Duncan

Sisko Kenneth

Stefan

Building the Time Sheet

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

Time Recording

Time Sheets

New Time Sheet

+

New Line

🗑️

Delete Timesheet

🖨️

Print

Sheet Value:

0.00

Fee Earner:

Dan Hearne

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

Matter No:

1

Load Client/Matter

Name:

O'Wilson-Smith

Matter:

Purchase 6 Anfield Road

DETAILS ▾

Save

Cancel

Delete

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

A

Code:

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 Earner:

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	CAT1SO 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 it ready to submit, navigate to Time Ledger > Time Sheets.

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

