



Osprey Approach: Transferring Time

This help guide was last updated on
Jul 10th, 2024

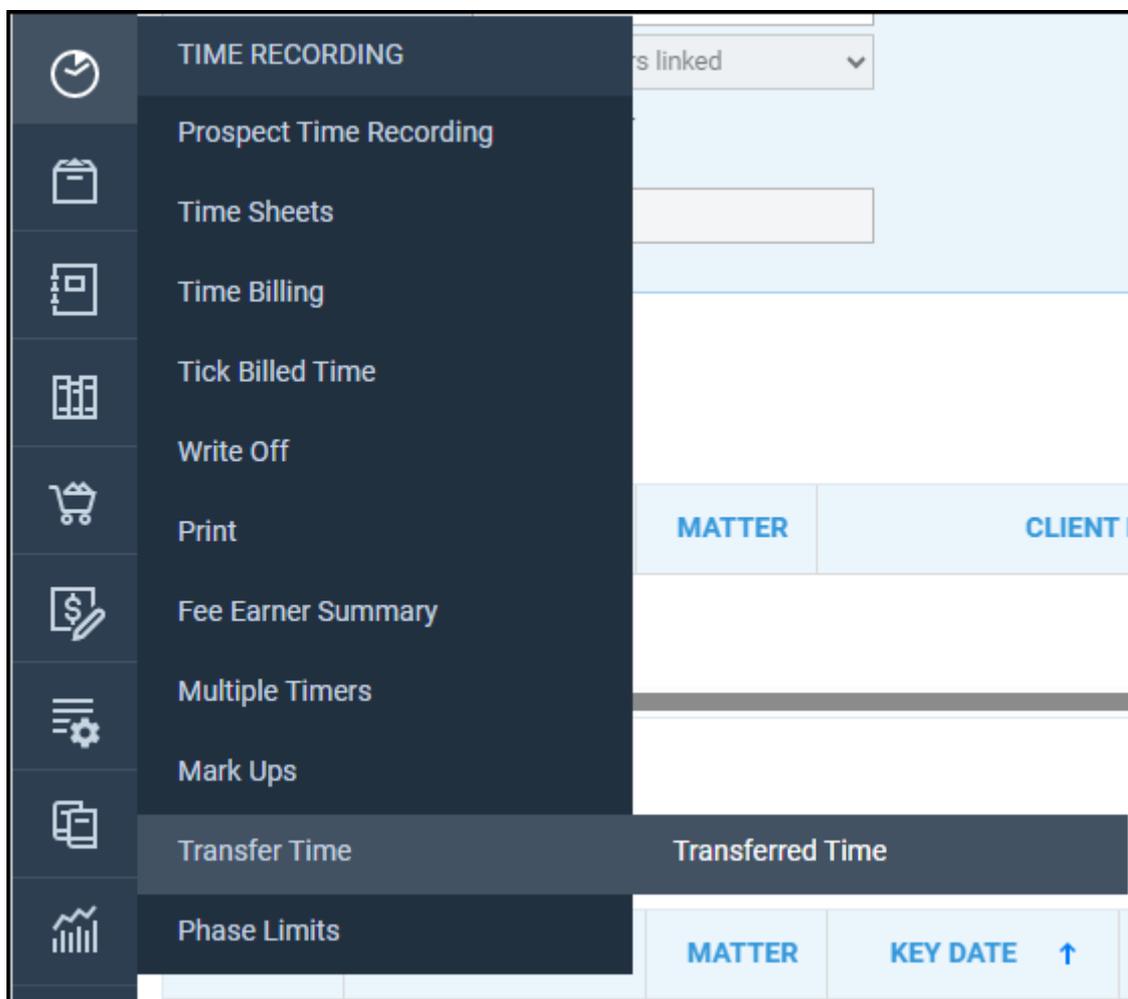
The latest version is always online at
<https://support.ospreyapproach.com/?p=29945>



Osprey offers the ability to transfer unbilled time between matters, whether for billing purposes, correcting a time posting posted to the wrong matter, or any other reason. This guide will take you through the process

Transferred Time Ledger

To view time postings that has been transferred to or from a client, navigate to Time Recording > Transfer Time > Transferred Time.



The time transferred screen will now appear, showing all the loaded client, and all Postings to the selected client.

The postings can be printed, or exported to CSV or PDF if required, simply by selecting the Print option.

Time Recording > Transfer Time > Transferred Time > Transferred Time For 100003 / 1

POSTINGS TRANSFERRED FROM THIS CLIENT/MATTER

[Print](#)

TRANSFER DATE	NEW CLI NO	NEW MAT NO	ENTRY DATE	DESCRIPTION	F/E	ACTIVITY	UNITS	MINS	RATE	VALUE
24/02/2022 16:49:02	100003	2	02/11/2021	_LETOUT - Letter Out	DAN	_LETOUT	10	60	1,000.00	1,000.00
10/05/2022 09:22:16	100003	2	18/08/2021	EMAIL - Send E-mail	DAN	EMAIL	0	6	75.00	7.50
10/05/2022 09:22:16	100003	2	07/10/2021	EMAIL - Send E-mail	DAN	EMAIL	1	6	15.00	15.00
10/05/2022 09:22:16	100003	2	02/11/2021	ADMIN - Administration	DAN	ADMIN	5	30	1,000.00	500.00

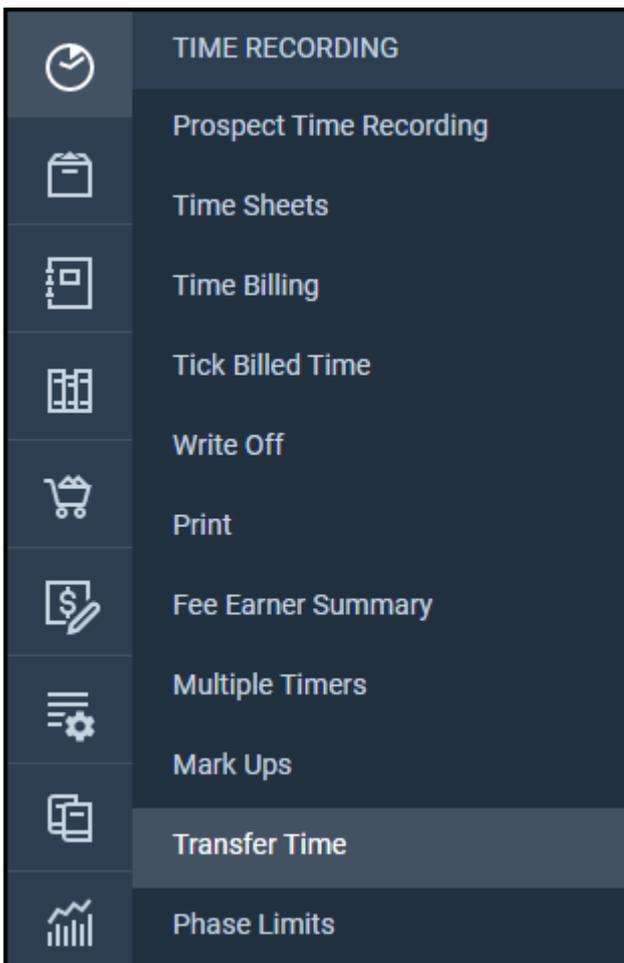
POSTINGS TRANSFERRED TO THIS CLIENT/MATTER

[Print](#)

TRANSFER DATE	OLD CLI NO	OLD MAT NO	ENTRY DATE	DESCRIPTION	F/E	ACTIVITY	UNITS	MINS	RATE	VALUE
24/02/2022 16:50:11	100003	4	18/08/2021	EMAIL - Send E-mail	DAN	EMAIL	0	6	75.00	7.50
14/07/2022 10:28:55	100003	4	14/07/2022	ADMIN - Administration	DAN	ADMIN	1	6	200.00	20.00
14/07/2022 10:28:55	100003	4	14/07/2022	Administration	DAN	ADMIN	4	24	250.00	100.00
14/07/2022 10:28:55	100003	4	14/07/2022	ADMIN - Administration	ADAMB	ADMIN	1	6	100.00	10.00

Transferring Time

To Transfer Time, go to Time Recording > Transfer Time



Enter the destination client and matter, or use the Client Search to locate the file you wish to transfer time to.

SELECT CLIENT & MATTER TO TRANSFER TIME TO ▼

Show Client Search ^

Client / Matter No: /

Below will be fields to assist with your selection.

SELECT POSTINGS TO TRANSFER

Transfer Time

Selection Type: Manual ▼

Manual
By Fee Earner
By Date

DATE

- **Manual:** Will allow you to manually select which time postings.
- **By Fee Earner:** Show all postings by a specific fee earner.
- **By Date:** Show all postings between a specific date range.

SELECT POSTINGS TO TRANSFER

Transfer Time

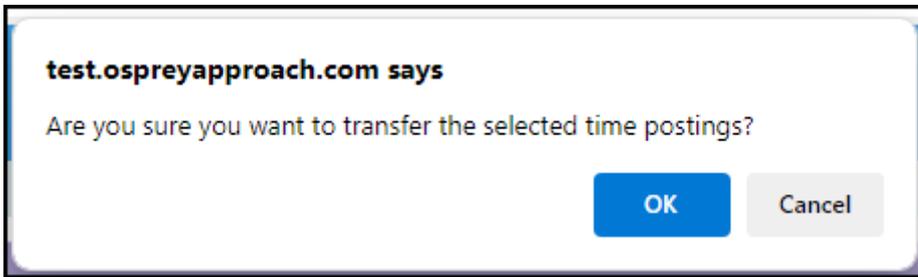
Selection Type: By Fee Earner ▼

Fee Earner: Dan Hearne ▼

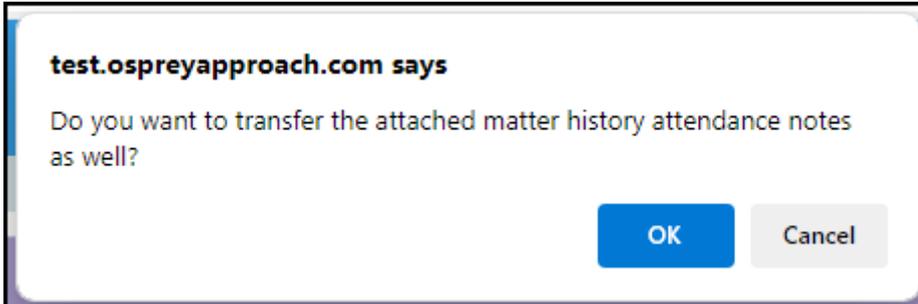
DATE	DESCRIPTION	F/E	ACTIVITY	UNITS	TIME UNITS	MINS	RATE	VALUE	TRANSFER?
19/04/2024	PREPARE - Preparation	DAN	PREPARE	5	0	30	200.00	100.00	<input checked="" type="checkbox"/>
19/04/2024	ADMIN - Administration	DAN	ADMIN	1	0	6	0.00	0.00	<input checked="" type="checkbox"/>
19/04/2024	COUNCEL - Attendance with council	DAN	COUNCEL	1	0	6	200.00	20.00	<input checked="" type="checkbox"/>
19/04/2024	EMAILIN - Email in	DAN	EMAILIN	1	0	6	200.00	20.00	<input checked="" type="checkbox"/>
19/04/2024	TELIN - Telephone Call In	DAN	TELIN	1	0	6	160.00	16.00	<input type="checkbox"/>
19/04/2024	STANLETT -	DAN	STANLETT	1	0	6	200.00	200.00	<input type="checkbox"/>
19/04/2024	TRV - Travel	DAN	TRV	1	0	6	100.00	10.00	<input type="checkbox"/>
19/04/2024	COUNCEL - Attendance with council	DAN	COUNCEL	1	0	6	200.00	20.00	<input type="checkbox"/>

Place a tick under Transfer? for all postings you wish to transfer.

Once your selection has been made, click Transfer Time. A series of confirmations will appear.



A second prompt will ask if you wish to transfer any attendance notes recorded against the time postings.



When you transfer a time recording to a different matter, the accompanying matter history entry will also be transferred to the new matter.