Osprey Approach: Time Spent Summary

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The latest version is always online at
https://support.pracctice.com/?p=33157

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Who is this guide for?

Accounts Users and **Accounts Supervisors**

This report shows summary totals of time posted on the system grouped by fee earner, work type and whether the work is billed, unbilled or written off. You can choose whether to show Billed, Unbilled, Written off or All time.

Filter options

Fee Earner – Tick this box if you want to show only one or a selection of fee earners. Once the box is ticked all fee earners marked as In Use will appear. You can then tick each one that you want to report on. If you want to see all fee earners, do not tick the fee earner box and it will produce all fee earners.

Work Type – Tick this box if you want to show only one or a selection of work types. Once the box is ticked all work types marked as In Use will appear. You can then tick each one that you want to report on. If you want to see all work types, do not tick the work types box and it will produce all work types.

Activity – Tick this box if you want to show only one or a selection of activity codes. Once the box is ticked all activity codes marked as In Use will appear. You can then tick each one that you want to report on. If you want to see all activity codes, do not tick the activity box and it will produce all activity codes.

Private or LA – If left on All, this will show both Private and Legal Aid clients matters. You can choose to show only Private or Legal Aid clients by selecting the appropriate option.

Date Filters – Enter the date range you want to report on here.

Show Unbilled – tick this box if you ONLY want to see Unbilled time (WIP)

Show Billed – tick this box if you ONLY want to see Billed time (time ticked against bills)

Show Written Off – tick this box if you ONLY want to see Written Off time (time which has been removed from the system using the Write Off Time option)

Leave all of the above boxes either ticked or unticked if you want to show all time whether billed, unbilled or written off.

Filter by Client – tick this box if you want to see only one client and matter. Two boxes will appear for you to enter the client and matter number that you require.

Grouping options

No Grouping – This will produce the report in client number order

Work Type – The report will be listed in client number order, grouped by work type.

Activity Code – The report will be listed in client number order, grouped by activity code.

Fee earner – This will produce the report in client number order, grouped into matter fee earner.

List of columns produced

Fee Earner Code

Fee Earner Name

Work Type Code

Work Type Description

Time in Units

Time in Minutes

Value of Time

Status (Billed, Unbilled or Written Off)