

## Time Recording

Cashier's Desktop allows you to record time against matters.

There are two methods for entering time:

1. **Time sheet** – allows you to enter a list of entries for a single fee earner.
2. **Single time entry** – allows you enter a single time entry for a fee earner.

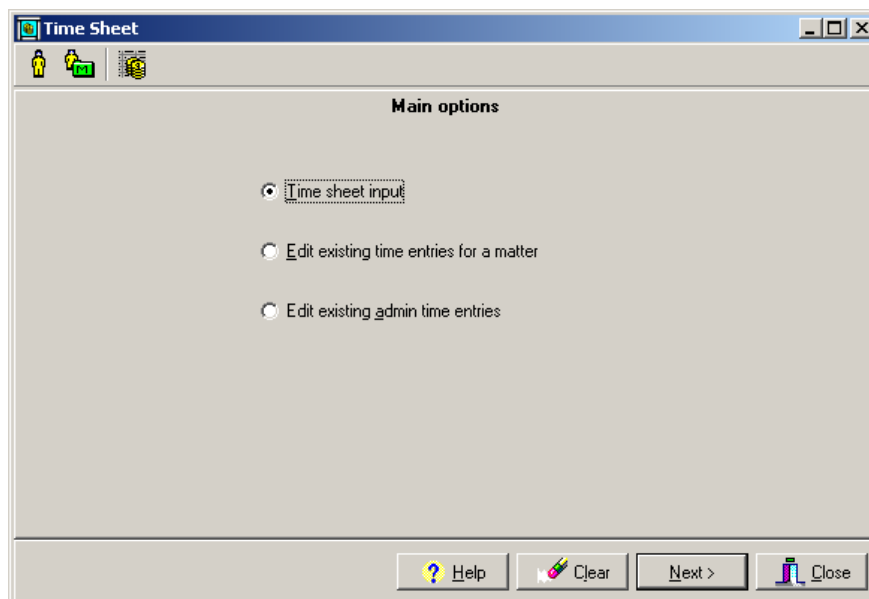
### Time Sheet

To use the Time sheet to record time for a single fee earner:

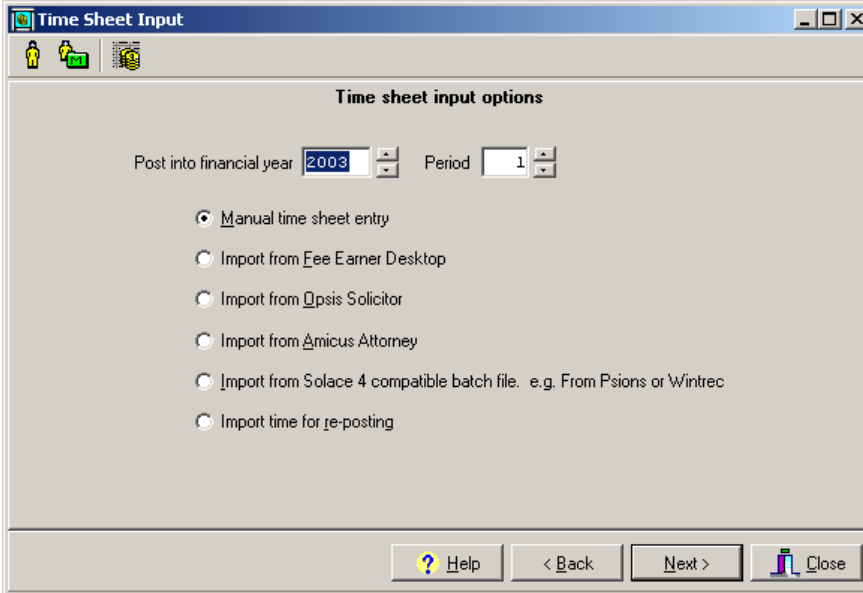
Go to the **WIP Posting** icon and select **Time Sheet**:



This will open the **Time sheet** screen:



Select **Time Sheet Input** and click on the **Next** button to select the **Time sheet input options**:

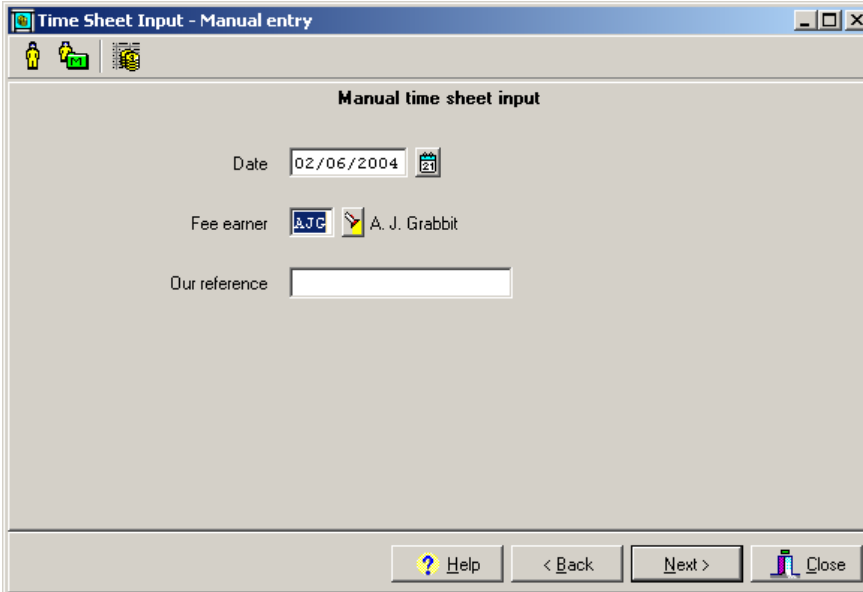


The screenshot shows a window titled "Time Sheet Input" with a toolbar containing icons for a person, a calendar, and a document. The main area is titled "Time sheet input options" and contains the following elements:

- Post into financial year: 2003 (dropdown menu)
- Period: 1 (dropdown menu)
- Radio button selection for input method:
  - Manual time sheet entry
  - Import from Fee Earner Desktop
  - Import from Opsis Solicitor
  - Import from Amicus Attorney
  - Import from Solace 4 compatible batch file. e.g. From Psions or Wintrec
  - Import time for re-posting

At the bottom, there are four buttons: Help (with a question mark icon), < Back, Next >, and Close (with a window icon).

Check that the period is correct and click on the **Next** button:




The screenshot shows a window titled "Time Sheet Input - Manual entry" with a toolbar containing icons for a person, a calendar, and a document. The main area is titled "Manual time sheet input" and contains the following elements:

- Date: 02/06/2004 (text field with a calendar icon)
- Fee earner: A.J.C. (text field) and A. J. Grabbit (dropdown menu with a torch icon)
- Our reference: (empty text field)

At the bottom, there are four buttons: Help (with a question mark icon), < Back, Next >, and Close (with a window icon).


Enter the date for the time sheet, the Fee earner code (click on the Torch and select the fee earner from the list) and any time sheet reference you may use.

Click on the **Next** button to open the **Time Sheet**:

1. To add a time record, click on the Torch  next to the **Matter** field and locate the matter. This will populate the **Category** field from the matter record.
2. Click on the Torch next to the **Activity** field and select the correct activity from the list.
3. Use the Tab key to move to the **Quantity** field – this will default to a quantity of 1.
4. Use the Tab key to move to the **Time Taken** field and enter the time taken (in units or minutes according to how your practice records time).
5. You can enter details in the two **Detail** fields.
6. Click on the **Add** button to add the next time record and complete it as above.
7. Once you have entered all of your time records, click on the **Post** button to post them to the relevant ledger cards.

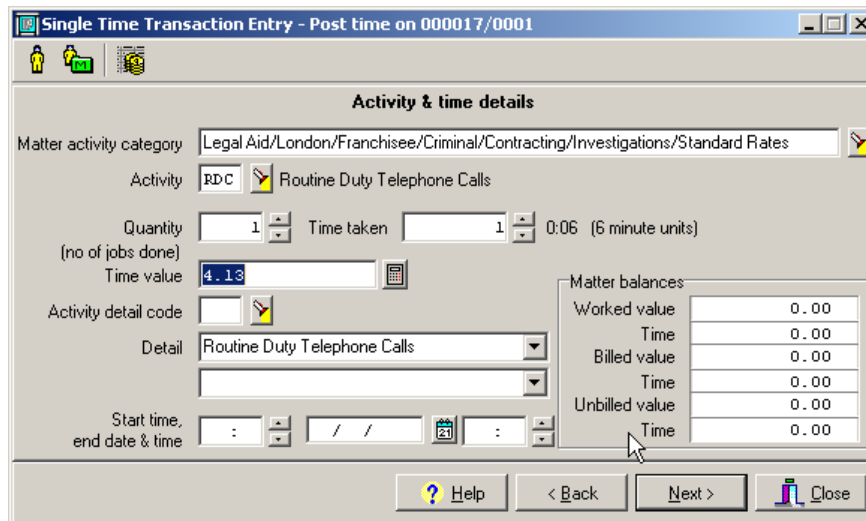
## Single Time Entry

To use the Time sheet to record time for a single fee earner:

Select the **Single Time Entry** icon  from the ledger card, or from the **Client, Matters and Individuals** screen or go to the **WIP Posting** icon and select **Single Time Entry**:



Check that the period and date is correct. Enter the Fee earner code (click on the Torch and select the fee earner from the list), the Matter number (click on the **Torch** next to the **Matter** field and locate the matter) and any time sheet reference you may use. Click on the **Next** button to open the **Activity & time details** screen:



The screenshot shows a software window titled 'Single Time Transaction Entry - Post time on 000017/0001'. The main area is titled 'Activity & time details'. It contains several input fields and a table.

**Activity & time details**

Matter activity category: Legal Aid/London/Franchisee/Criminal/Contracting/Investigations/Standard Rates

Activity: RDC Routine Duty Telephone Calls

Quantity (no of jobs done): 1 Time taken: 1 0:06 (6 minute units)

Time value: 4.13

Activity detail code: [empty]

Detail: Routine Duty Telephone Calls

Start time, end date & time: [empty]

Matter balances:

Worked value	0.00
Time	0.00
Billed value	0.00
Time	0.00
Unbilled value	0.00
Time	0.00

Buttons: Help, < Back, Next >, Close

1. The **Category** field will be populated from the matter record:
2. Click on the Torch next to the **Activity** field and select the correct activity from the list.
3. Use the Tab key to move to the **Quantity** field – this will default to a quantity of 1.
4. Use the Tab key to move to the **Time taken** field and enter the time taken (in units or minutes according to how your practice records time). This may be automatically be updated if the activity is given a specific time allowance by the Legal Services Commission.

This will populate the **Time Value** field with the value of the time entry.

5. You can enter details in the two **Detail** fields and select an Activity detail code if appropriate. Click on the **Next** button.

6. Enter any notes as required and then click on the **Post** button to post the time entry to the relevant ledger card.

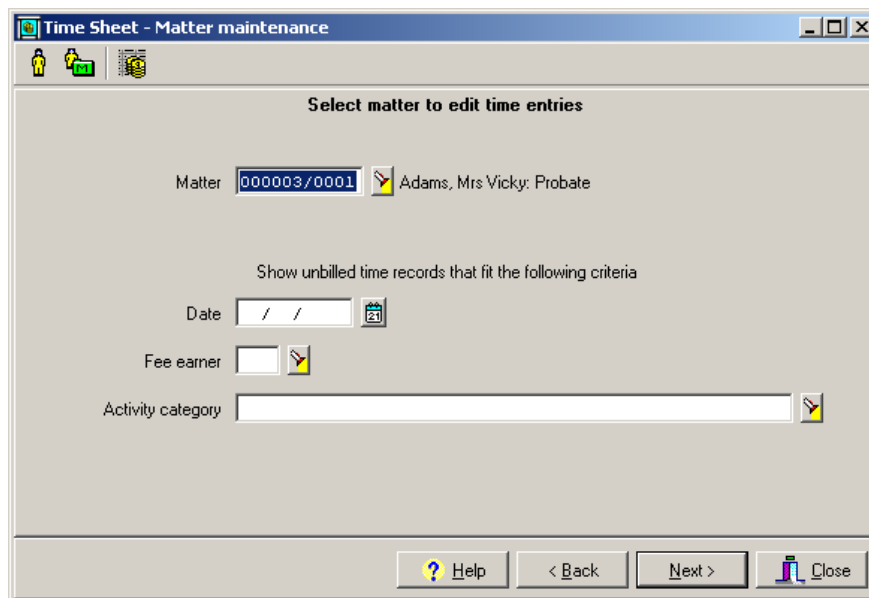
### ***Deleting time entries***

To delete unbilled time posted on a ledger:

1. Go to the **WIP Posting** icon and select **Time Sheet**:



2. Select Edit **existing time entries for a matter** and click on the **Next** button to select the matter:

A screenshot of a software dialog box titled 'Time Sheet - Matter maintenance'. The dialog has a title bar with standard window controls. Below the title bar, there are three small icons. The main area is titled 'Select matter to edit time entries'. It contains a 'Matter' field with the value '000003/0001' and a dropdown arrow, followed by the text 'Adams, Mrs Vicky: Probate'. Below this, it says 'Show unbilled time records that fit the following criteria'. There are three fields: 'Date' with a date picker icon, 'Fee earner' with a dropdown arrow, and 'Activity category' with a dropdown arrow. At the bottom, there are four buttons: 'Help' (with a question mark icon), '< Back', 'Next >', and 'Close' (with a window icon).

Click on the Torch and locate the matter. You can also restrict the unbilled time records by Date, Fee Earner and Activity Category (these are optional).

- Click on the Next button to select time entries:

Date	Detail	Our ref	Time	Quantity	Value	Select
26/02/2004	Preparation - Docume		1 : 00	1	20.00	
12/05/2004	Preparation - Attendar		0 : 18	1	16.72	
21/05/2004	Advocacy Enhanced		1 : 00	1	150.00	✓
09/01/2004	Preparation - Docume		0 : 50	1	125.00	✓
03/06/2004	Preparation - Attendar		1 : 00	1	150.00	✓

Highlight the time entries you would like to delete and click on the **Select** button or the **Select All** button if appropriate. This will put a green tick in the Select column.

In the **Task to perform on the time records selected below** list, select 'Delete the records' and click on the **Post** button. You will be asked if you want to delete these records, click on the **Yes** button.

### ***Recalculating time records***

To recalculate unbilled time posted on a ledger to another ledger:

- Go to the **WIP Posting** icon and select **Time Sheet**:



2. Select **Edit existing time entries for a matter** and click on the **Next** button to select the matter:

Click on the Torch and locate the matter. You can also restrict the unbilled time records by Date, Fee Earner and Activity Category (these are optional).

3. Click on the **Next** button to select time entries:

Date	Detail	Our ref	Time	Quantity	Value	Select
26/01/2005	Preparation - Docume		10.00	1	200.00	✓
26/01/2005	Initial Meeting		3.33	0	50.00	✓
11/02/2005	Preparation - Attendar		30.00	1	600.00	
11/02/2005	Preparation - Attendar		5.00	1	100.00	
26/01/2005	Initial Meeting		6.67	1	100.00	

Highlight the time entries you would like to recalculate and click on the [Select] button or the **Select All** button if appropriate. This will put a green tick in the Select column.

In the **Task to perform on the time records selected below** list, select 'Recalculate the charges'.

Click on the **Post** button. You will be asked if you want to recalculate these records, click on the **Yes** button.

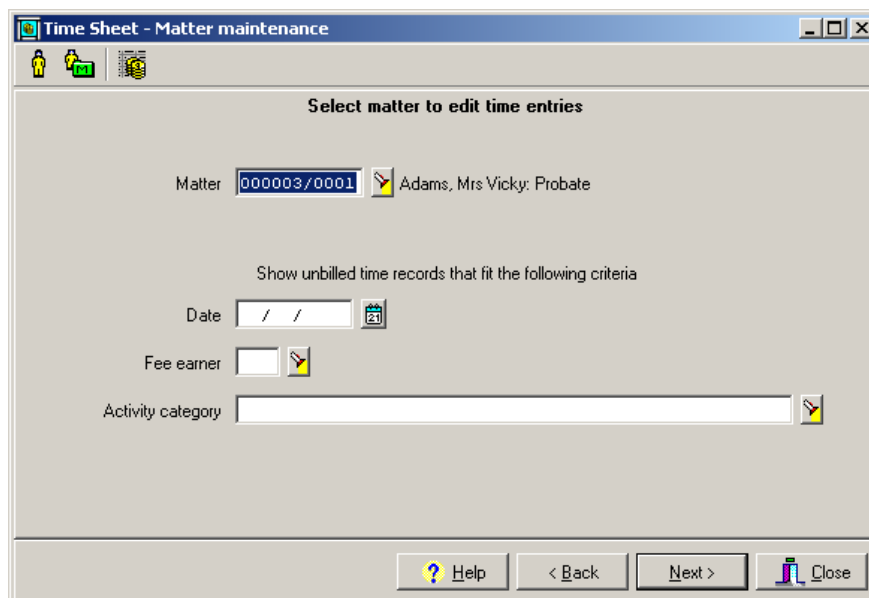
## ***Moving time entries***

To move unbilled time posted on a ledger to another ledger:

1. Go to the **WIP Posting** icon and select **Time Sheet**:

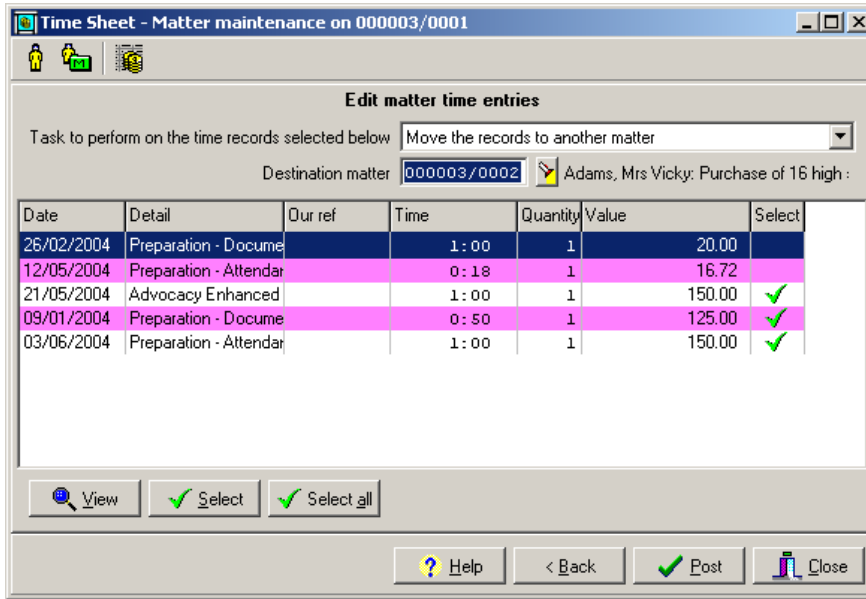


2. Select **Edit existing time entries for a matter** and click on the **Next** button to select the matter:

A screenshot of a software dialog box titled 'Time Sheet - Matter maintenance'. The dialog has a title bar with standard window controls. Below the title bar, there are three small icons: a person, a document, and a stack of coins. The main area of the dialog is titled 'Select matter to edit time entries'. It contains a 'Matter' field with the value '000003/0001' and a dropdown arrow, followed by the text 'Adams, Mrs Vicky: Probate'. Below this, there is a section titled 'Show unbilled time records that fit the following criteria'. This section contains three fields: 'Date' with a date picker icon, 'Fee earner' with a dropdown arrow, and 'Activity category' with a text input field and a dropdown arrow. At the bottom of the dialog, there are four buttons: 'Help' (with a question mark icon), '< Back', 'Next >', and 'Close' (with a close icon).

Click on the Torch and locate the matter. You can also restrict the unbilled time records by Date, Fee Earner and Activity Category (these are optional).

3. Click on the **Next** button to select time entries:



Highlight the time entries you would like to move and click on the [Select] button or the **Select All** button if appropriate. This will put a green tick in the Select column.

In the **Task to perform on the time records selected below** list, select ‘Move the records to another matter’. Use the Torch to locate the **Destination Matter**.

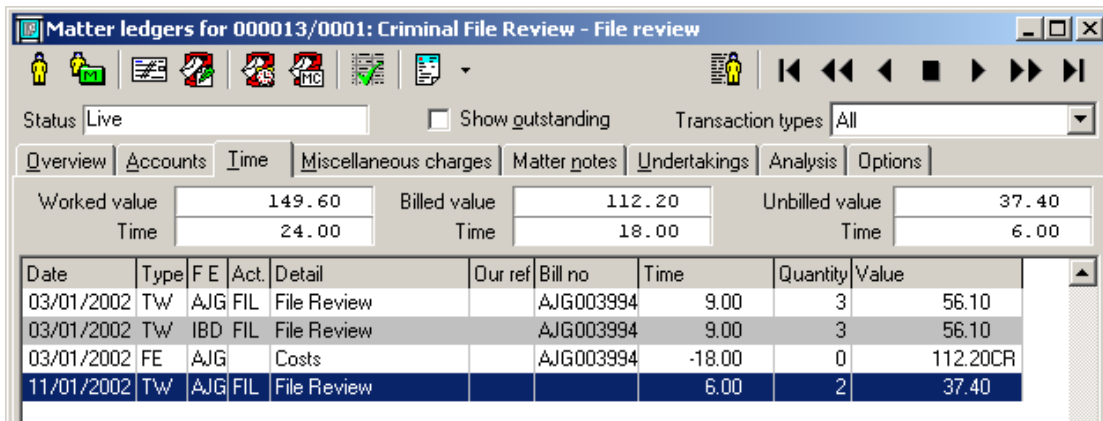
Click on the **Post** button. You will be asked if you want to move these records, click on the **Yes** button.

### Viewing posted time records

To view a time record:

1. Press the F8 key to open the matter ledgers.
2. Use the Search facility to locate the ledger card for the client you are interested in.

Click on the **Time** tab page to view all the time entries for that matter:



Billed time will have a bill number displayed in the Bill number column.

If a credit note is issued against a bill containing billed time, the time will be unbilled and ready to be picked up on a new bill.