

Osprey Approach: Using the Workflow Status Bar

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The latest version is always online at https://support.ospreyapproach.com/?p=69500



This guide will assist with using and updating the workflow status bar to display information relevant to the file

If enabled, the workflow status bar appears at the top of the screen when using the Case Management area. This can be amended and updated as required to display information relevant to the file.

How to enable the Workflow Status Bar

To enable the Workflow Status Bar, navigate to the Supervisor area. Go to System Setup > Users > Access Templates.

≡	Osprey Approach Test	ne: 00h:00m Global search	Client Details
0	Supervisor System Setup	Users Edit Access Template	
仚	Save		
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•	SUPERVISOR		
G	Code Setup	RS	
Ē	System Setup	Branches	
_	Financial Setup	Departments	
	Case Management Setup	Labels Setup	
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\$	Tools & Utilities	Communication Settings	
-7/	Financial Periods	Users	Add User
•	CRM-AF1 Additional Rates	Ledger View	Access Templates
Ē	CRM Auto Posting Defaults	Configuration Settings	Request Rights
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11111	Include Documents	Email Setup	
(Ĉ	Portal Setup	Rebranding	

Choose which user template you would like to access the status bar and click 'Edit'. Expand the Case Management area, and then expand the Workflow subsection. At the bottom of the list, you will see a section called Workflow Status Bar; tick this and click Save. This will then enable you to edit and view the bar wherever it appears in Osprey.

Supervisor System Setup Us	Jsers Edit Access Template	
🖹 Save		
> 🗹 🏠 OSPREY HOME		
> 🗹 🦗 CLIENTS & MATTERS		
> 🗹 🕐 TIME RECORDING		
🐣 🗹 📋 CASE MANAGEMENT		
> 🗹 Key Dates		
> 🗹 Dossier		
> 🗹 Document Production		
> 🗹 Contacts & Organisations		
✓ ✓ Workflows		
Remove Workflows		
> 🗹 Edit		
> 🗹 Load		
🗹 Run		
🗹 Get User Email		
> 🗹 Workflow Status Bar		
> 🗹 Debt Recovery		
> 🗹 Contract Work Forms		
🗹 Advocate Graduated Fees		
🗹 Advocate Graduated Fees		
AF1 Print		
> 🗹 Stamp Duty Land Tax		

RTAPI Claims

How to update the workflow status bar

The workflow status bar can be used to display the current position of a matter. Most user pages show the workflow status bar at the top of the page.

🚓 WORKFLOW ST	TATUS BAR			
Key Dates: Date: De	escription: More Key Dates 🗸	Ø 💼		
CLIENT & MATTER SEARCH 🗸 Sclient Search 🔁 Dossier Search 隆 CRM Search 💟 Send e-mail 💽 Client Dossier 🗋 SMS				
Client No: Matter No:	A00001 Load Client/Matter			
Name:	Adams Q			
Matter:	Purchase of Rose Cottage			

To amend the description, in a browser select the pencil icon to open up a text field

✿ WORKFLOW STATUS BAR		
Key Dates: Date: Description:	More Key Dates 🗸	£ [†]

Now select the Save option to display your text throughout the user area.

The status bar can also be updated using the workflow task action Update Workflow Status Bar.

ACTIONS LINKED TO TASK			AVAILABLE ACTIONS
Send Standard Document Send Standard Document A Client Care Guide	[↓] t X ⊙	ENTER DETAILS Update Workflow Status Bar	ACTIONS Display a Matter View in Web Publisher
Display a message to the user	${}^{4}_{1}\times \odot \mathscr{O}$	Message	Display a Client View in Web Publisher
Display a message to the user Example of a configurable message displayed to the user.		🖹 Save (🗙 Close	Send XIT2 Acknowledgement
Send an email to a client	4 ₇ × ⊙		Send an automatic email to a user
Send an email to a client			Unpublish a Published Matter
Update Workflow Status Bar	${}^{\!$		Update Workflow Status Bar
Update Workflow Status Bar New status flag!			Update Chain View Status
			Produce Oyez Form