

# Osprey Approach: Using the Workflow Status Bar

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Sep 6th, 2024

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

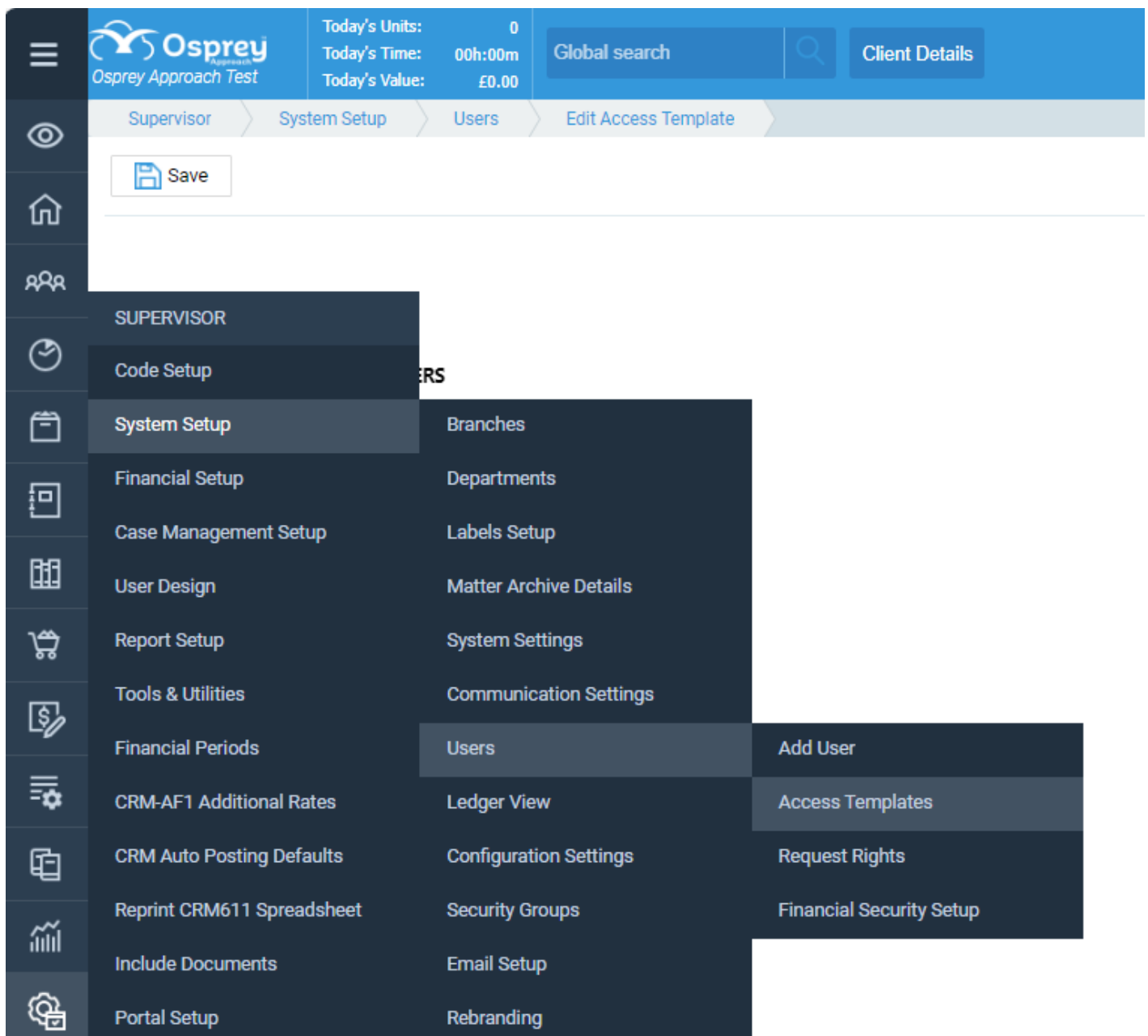


# This guide will assist with using and updating the workflow status bar to display information relevant to the file

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.



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 > Users > 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 STATUS BAR**


Key Dates: Date: Description: **More Key Dates**  


**CLIENT & MATTER SEARCH** 


 Client Search |  Dossier Search |  CRM Search |  Send e-mail |  Client Dossier |  SMS

Client No:  

Matter No:  


Name:  

Matter:  

 Load Client/Matter

















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	ENTER DETAILS	AVAILABLE ACTIONS
<p><b>Send Standard Document</b>   </p> <p>Send Standard Document <i>A Client Care Guide</i></p> <p><b>Display a message to the user</b>    </p> <p>Display a message to the user <i>Example of a configurable message displayed to the user.</i></p> <p><b>Send an email to a client</b>   </p> <p>Send an email to a client</p> <p><b>Update Workflow Status Bar</b>    </p> <p>Update Workflow Status Bar <i>New status flag!</i></p>	<p><b>ENTER DETAILS</b></p> <p>Update Workflow Status Bar</p> <p>Message <input type="text"/></p> <p> Save  Close</p>	<p><b>AVAILABLE ACTIONS</b></p> <p><b>ACTIONS</b></p> <ul style="list-style-type: none"> <li>Display a Matter View in Web Publisher</li> <li>Display a Client View in Web Publisher</li> <li>Send XIT2 Acknowledgement</li> <li>Send an automatic email to a user</li> <li>Unpublish a Published Matter</li> <li><b>Update Workflow Status Bar</b></li> <li>Update Chain View Status</li> <li>Produce Oyez Form</li> </ul>