Osprey Approach: Using the Workflow Status Bar (App)

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The latest version is always online at https://support.ospreyapproach.com/?p=53158

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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 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.
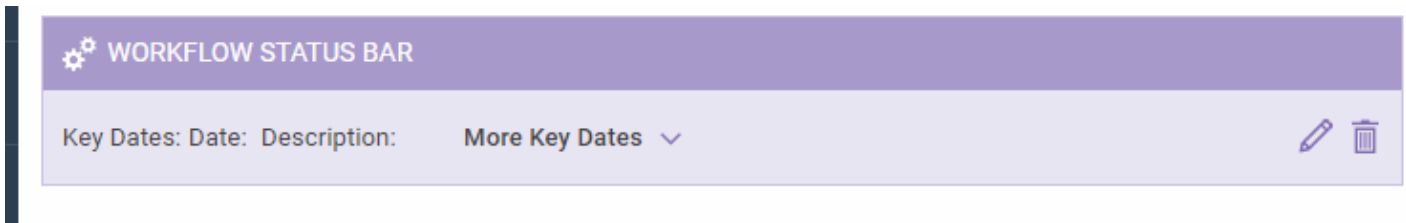

To amend the description, in a browser select the pencil icon to open up a text field

In the Case Management App you will also need to click Edit

Here you will be able to type in the current position or any note required.

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

Send Standard Document

Send Standard Document
A Client Care Guide

Display a message to the user

Display a message to the user
Example of a configurable message displayed to the user.

Send an email to a client

Send an email to a client

Update Workflow Status Bar

Update Workflow Status Bar
New status flag!

ENTER DETAILS
Update Workflow Status Bar

Message

Save   Close

AVAILABLE ACTIONS

ACTIONS

Display a Matter View in Web Publisher

Display a Client View in Web Publisher

Send XIT2 Acknowledgement

Send an automatic email to a user

Unpublish a Published Matter

Update Workflow Status Bar

Update Chain View Status

Produce Oyez Form