



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.

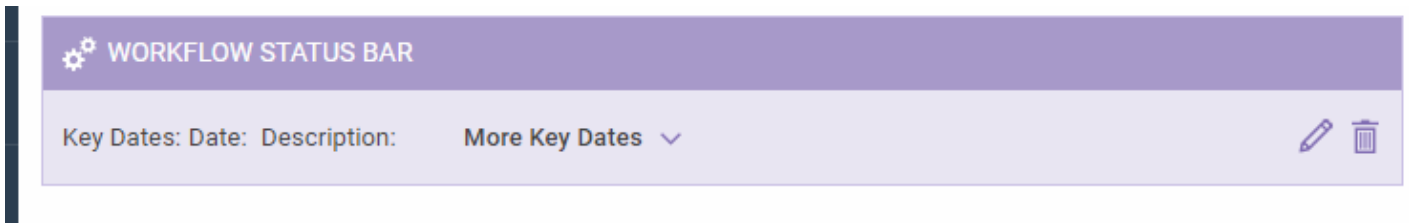


Home - B00002/1 (Braithwaite Neil/Default Matter) FE: MB WT: CPUR

MATTERS FOR REVIEW

CLIENT	MATTER	CLIENT NAME	F/E	REVIEW DATE	TYPE	PERIOD	TIME LMD	LMD	
W00003	4	Woods Richard R A	TOMG	10/04/2019			0	13/02/2020	●
B00002	10	Braithwaite Neil	TOMG	26/09/2019			0	04/09/2019	●
C00009	16	Chegg Scott STC	TOMG	11/12/2019		1825		26/11/2019	●
TE0001	2	Test 05 John J	TOMG	04/03/2020			0	19/02/2020	●
TE0003	1	Test 05 John J	TOMG	04/03/2020			0	19/02/2020	●
TE0003	4	Test 05 John J	TOMG	04/03/2020			0	19/02/2020	●

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



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TE0003	4	Test 05 John J	TOMG	04/03/2020			0	19/02/2020	●

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 <i>A Client Care Guide</i>
Display a message to the user    
Display a message to the user <i>Example of a configurable message displayed to the user.</i>
Send an email to a client   
Send an email to a client
Update Workflow Status Bar    
Update Workflow Status Bar <i>New status flag!</i>

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 Dyez Form 