



Osprey Approach: The Workflow Status Bar

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The latest version is always online at
<https://support.pracctice.com/?p=703>

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Who is this guide for?

Any Users

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.

Step 1

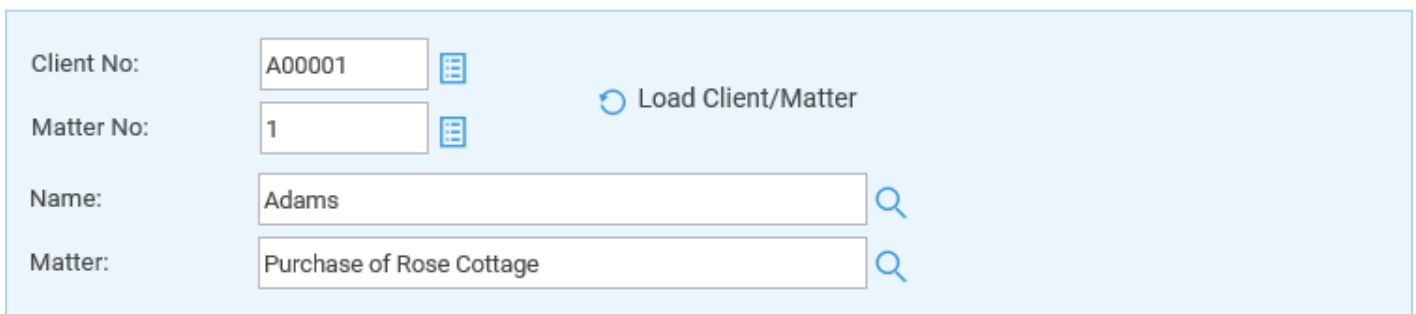
The Workflow Status Bar can be used to display the current position of a matter. Most user pages show the Workflow Status Bar at the top of the page.



The screenshot shows a purple header bar with a gear icon and the text "WORKFLOW STATUS BAR". Below this is a light purple bar containing the text "Key Dates: Date: Description: More Key Dates" with a dropdown arrow. On the right side of this bar are icons for editing (pencil) and deleting (trash).

CLIENT & MATTER SEARCH

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

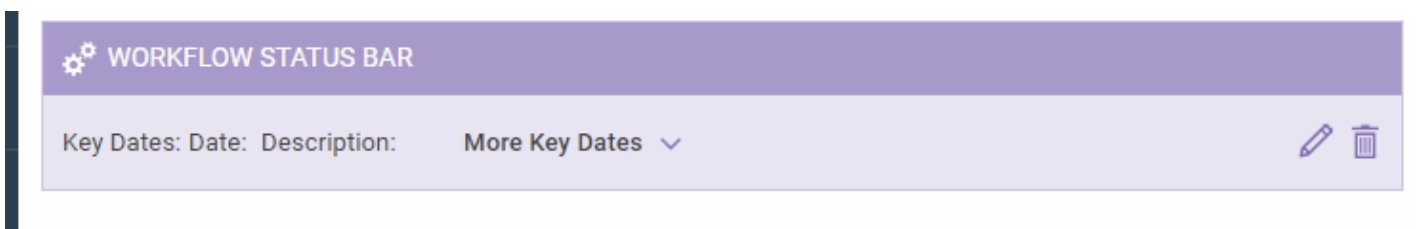


The screenshot shows a search form with the following fields and values:

- Client No: A00001
- Matter No: 1
- Name: Adams
- Matter: Purchase of Rose Cottage

A "Load Client/Matter" button with a refresh icon is located to the right of the Matter No field. Search icons are present to the right of the Name and Matter fields.

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



This screenshot is identical to the one above, but a vertical black bar highlights the pencil icon on the right side of the Workflow Status Bar, indicating that clicking it allows for editing the description.

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



This screenshot is identical to the one above, but a vertical black bar highlights the pencil icon on the right side of the Workflow Status Bar, indicating that clicking it allows for editing the description.

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	



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	●

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 Oyez Form