

Osprey Approach: Performing an InfoTrack Search

This help guide was last updated on
Jan 27th, 2025

The latest version is always online at
<https://support.ospreyapproach.com/?p=53146>



Osprey Approach offers integration with InfoTrack, allowing you to run InfoTrack searches and have results automatically uploaded back into the Matter History. This guide will go through this process

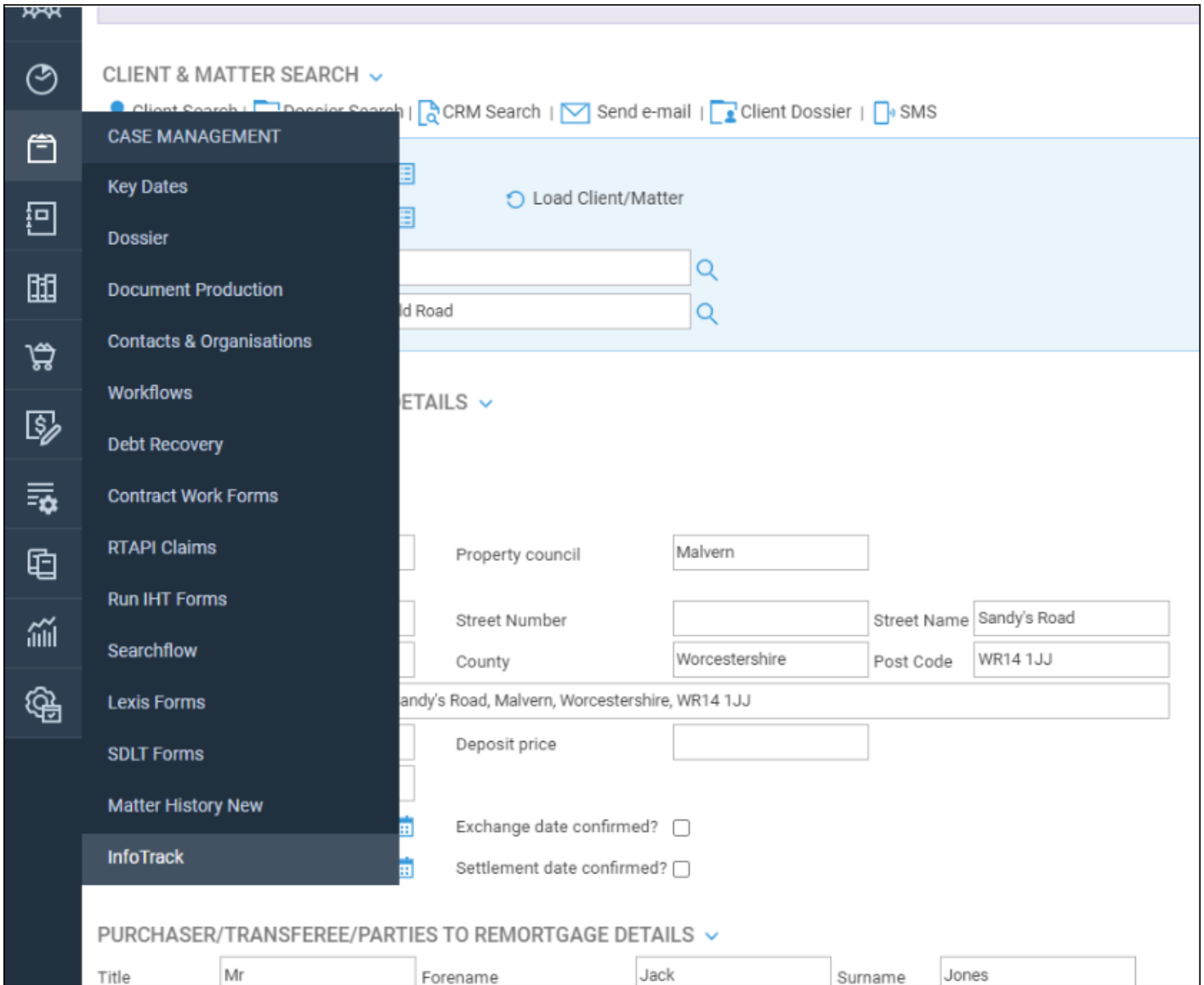
Osprey can automatically populate the InfoTrack screen with data already captured.

Accessing the InfoTrack screen

Navigate to Case Management > InfoTrack.

If configured, Osprey will populate any relevant fields. These fields can also be completed manually and edited if required.

If you are manually adding details onto the InfoTrack Screen, any data will not be saved if you navigate away. Users will need to enter data into the dossiers to ensure data is retained.



Submitting an order


At the bottom of the screen, you will see a Submit New Order. When clicking this, you will be taken to the InfoTrack website, pulling through any information through, ready to perform any searches.



Order history

At the bottom of the page, you will find the orders that have been submitted and the status of them.

MATTER SUBMITTED INFOTRACK ORDERS ▼

ORDER ID	DESCRIPTION	REFERENCE	STATUS	DATE ORDERED	DATE COMPLETED	ORDERED BY	ORDER DETAILS...
-1			Unknown	01/01/0001	01/01/0001		

Page 1 of 1 (1 Items) « < 1 > »

Once an order has been completed, an automated email will arrive from InfoTrack, advising the searches to have been completed. Osprey will also provide an automated email, letting you know that the search results have been returned, and uploaded to the client's matter history.