Osprey Approach: Performing an InfoTrack Search (App)

This help guide was last updated on
Dec 27th, 2023

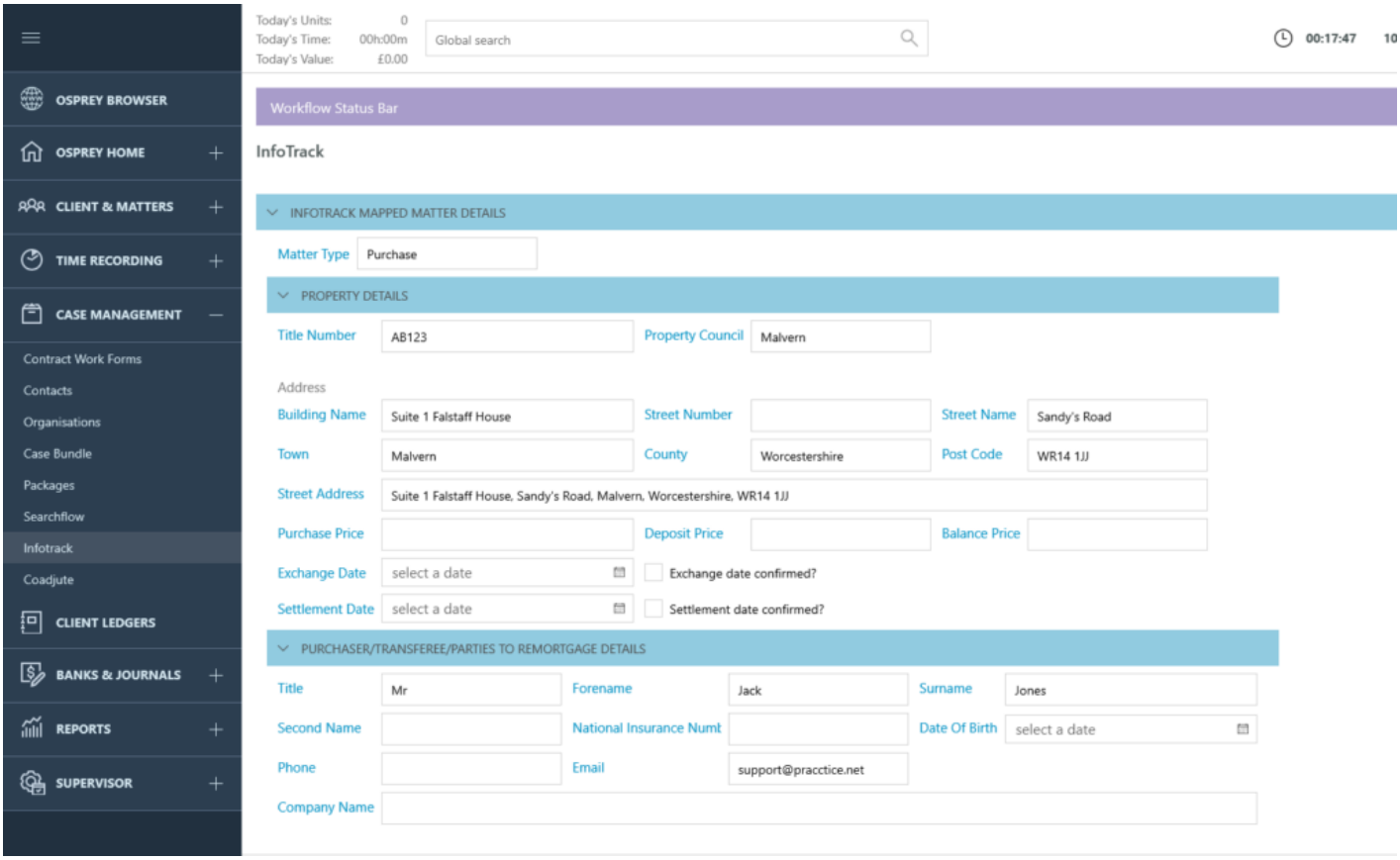
The latest version is always online at
https://support.ospreyapproach.com/?p=29980

Osprey Approach offers integration with InfoTrack, allowing you to run InfoTrack searches and have results automatically uploaded back into the Matter History.

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.

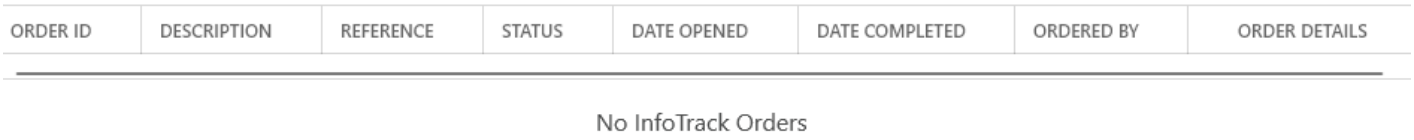


Submitting an Order

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.



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.