

THE SMART WAY TO RUN YOUR SMALL PRACTICE



SILQ Solicitor Learner Guides

Manual 8: Using InfoTrack in SILQ

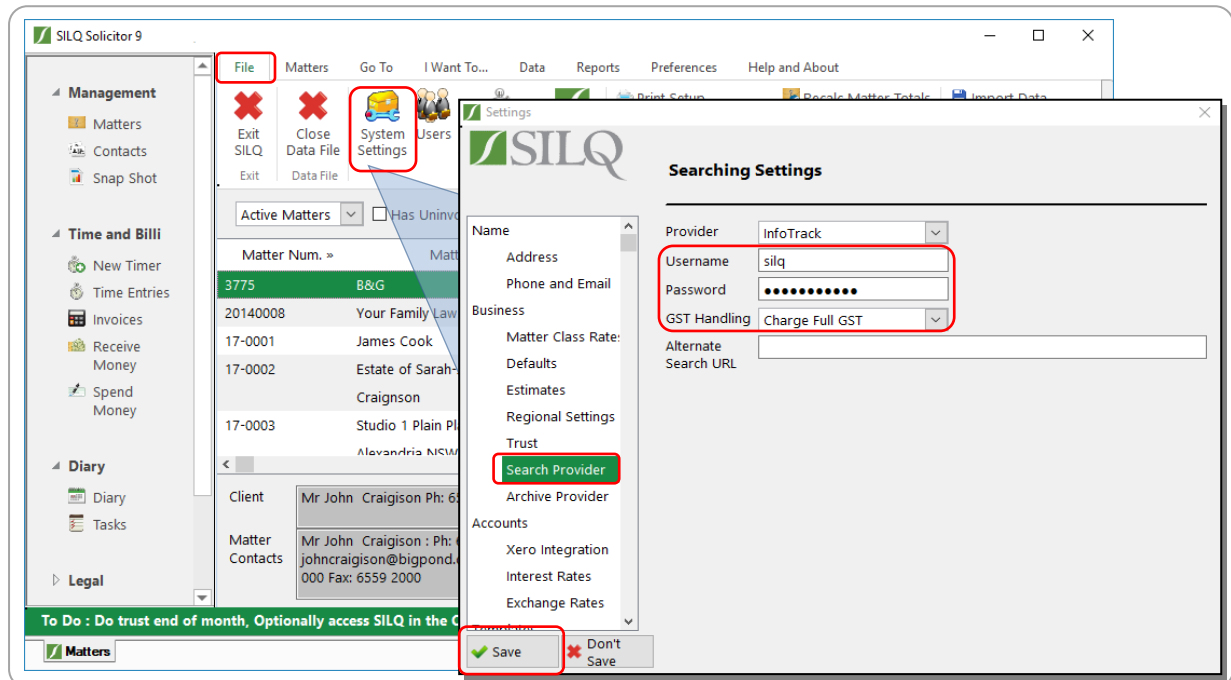
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1. Setting up InfoTrack

1.1 Setting up InfoTrack if you have an existing InfoTrack account



Note: Infotrack Intergration is available for computers running a Windows Operating System. Please contact InfoTrack to arrange for InfoTrack Intergration with SILQ to be set up. Intergration will allow SILQ to automatically put the cost recovery and any associated documents for InfoTrack searches performed via SILQ in your Matters.

If you already have an InfoTrack account, you can enter your user credentials into SILQ.

To enter your InfoTrack user details into SILQ click on **File** in the top menu bar and then click on **System Settings**.

Once you are in Settings, click **Search Provider** in the side bar. Then you will see two fields on the right-hand side where you can enter your InfoTrack **Username** and **Password**.

Next select how you would like charge GST for your searches. The two options are **Charge Full GST** and **Charge Actual GST**.

Charging Full GST will include the statutory cost of the search as well as the cost and the GST that was charged to you by InfoTrack. For example the statutory cost is \$7.50, which is GST free and Infotrack charges \$5.00 per search plus 10% GST which equals \$5.50. So the **Charging full GST** option will mean you will charge 10% on the total of \$13.00, which will equal, \$1.30 GST.

While selecting **Charge Actual GST** will include the statutory cost of the search as well as just the cost that was charged to you by InfoTrack for doing the search



excluding GST. For example the statutory cost is \$7.50, which is GST free and Infotrack charges \$5.00 per search plus 10% GST which equals \$5.50. So the **Charging Actual GST** option will mean you will only charge GST on \$12.50, which doesn't include the 10% GST InfoTrack charged you for doing the search. So the GST on the total of \$12.50, will equal, \$1.25 GST.

Once these details are entered, click on the **Save** button in the bottom left-hand side of the dialogue box.

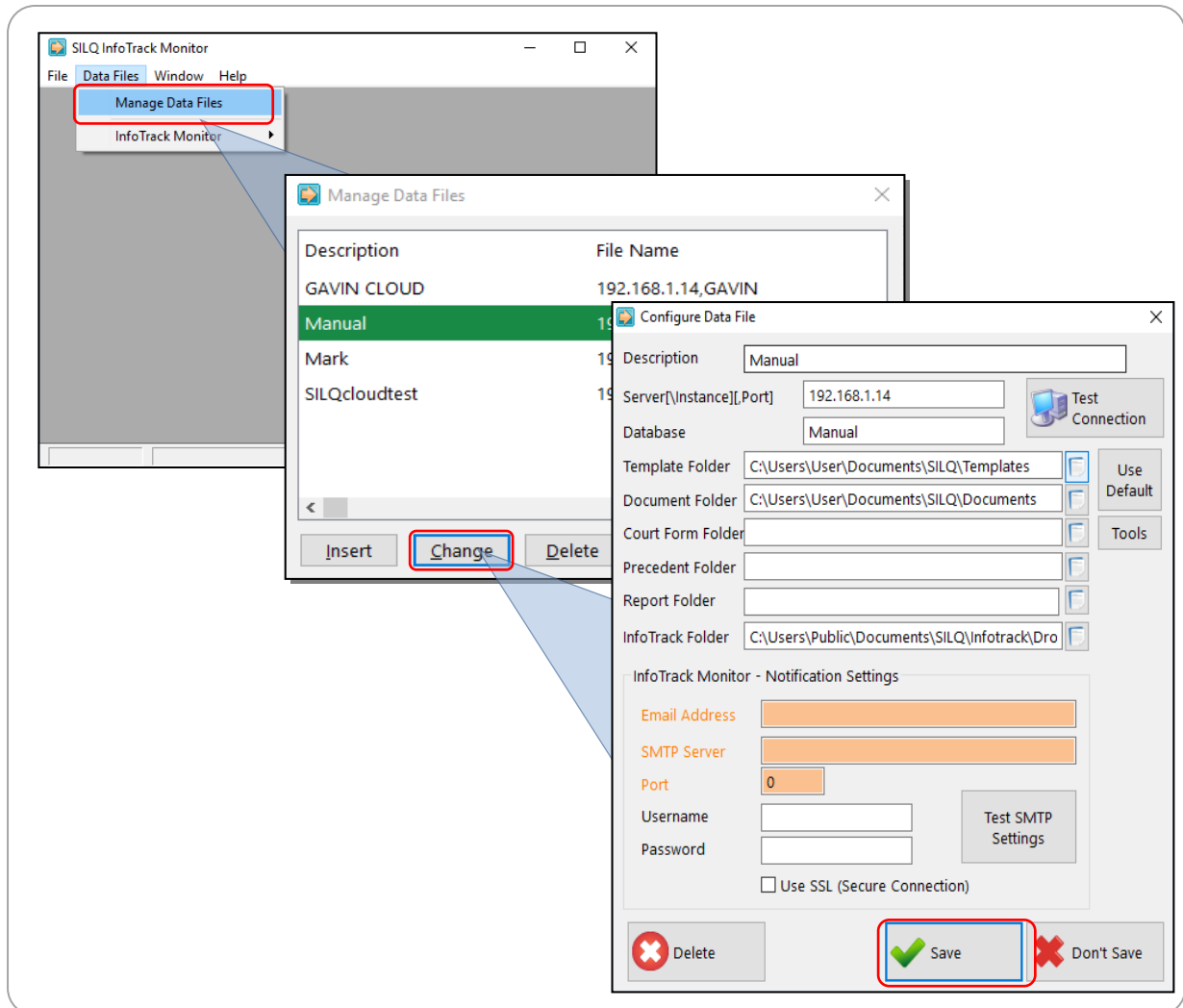
Once this is complete, you are now setup ready to start using InfoTrack.



2. Setting up the InfoTrack Monitor

Note: Please note that a SILQ technician will set up the InfoTrack monitor for you as apart of the InfoTrack Intergration set up.

In order for SILQ to receive results from the InfoTrack website, the InfoTrack monitor need to set up on your server to handle all incoming search results from the InfoTrack website. The ITrack service needs to be installed and running in order for the monitor to process the result files.



To set up the InfoTrack monitor so it works with your datafile, on your server open up the InfoTrack Monitor which should also be installed once you install SILQ.

When the SILQ InfoTrack monitor opens up, click on **Data Files** and then from the drop down menu click on **Manage Data Files**.

A list will appear with all the data files on your site. Click on the data file that you want to set up the InfoTrack monitor. In the example above, the Manuals data file has been selected. Next click on the **Change** button.

The **Configure Data File** window will open up.



Click on the **Use Defaults** button to set the **Template** and **Documents** folder. If they are located in a different location, click on the icon to the right of each field and specify the correct locations.

Next specify the **InfoTrack folder** by clicking on the icon to the right of InfoTrack Folder field and navigating to:

C:\Users\Public\Documents\SILQ\InfoTrack\DropFolder

Next you will need to enter the **InfoTrack Monitor – Service Settings**.

If there is a notification on the InfoTrack monitor that needs to be actioned in order for it to continue processing searches, then an email will be sent to the email address specified in this section as a way of actioning the notification to ensure the monitor keeps running smoothly and continues to process searches.

Email Address: Enter the email address to send the notification to.

SMTP Server: Enter the SMTP server address

Port: Specify the port number

Username and Password: Enter the email accounts username and password.

Use SSL: If the email account uses Secure connection, click on the Use SSL tickbox.

Once you have all the information click on the **Save** button.

Repeat this process for any other data files that need to be connected to the infoTrack Monitor.

Once completed you can click on the Close button on the Manage data Files window.

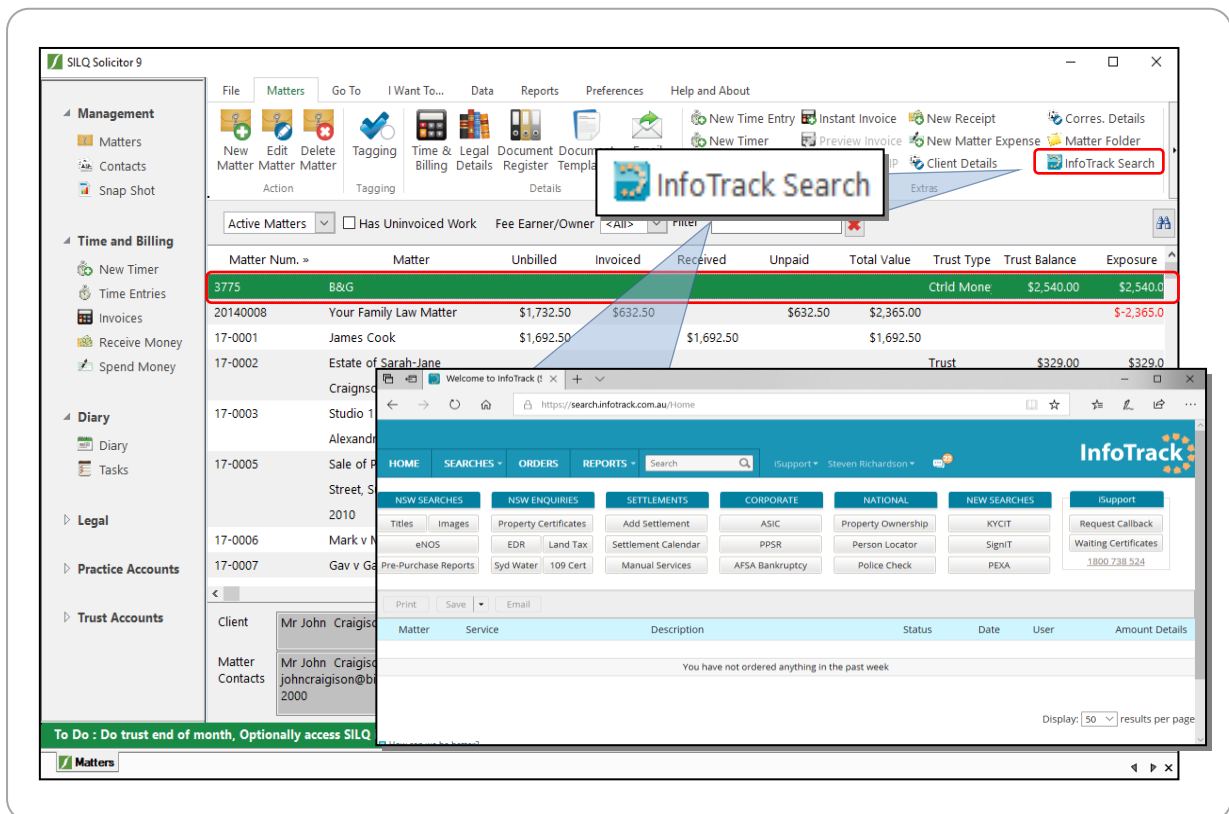


3. How to perform a search using InfoTrack

3.1 Doing an InfoTrack search from the Matters screen

Overview

- There are two ways to do an InfoTrack search in SILQ. The first way is through the Matters screen and the second in through the Legal Details screen.



NB: Please note this is just a basic example of doing a search. You will need to contact InfoTrack on how to do a comprehensive search on their site.

To perform a search from the Matters screen, navigate to the matters screen by clicking on the **Matters** button on the top navigation menu bar.

In the main window of the matters screen, click on the matter that you want to run a search on. It will highlight in green. Then click on the Infotrack Search button in the Extras section of the top toolbar. Your web browser will launch and you will be automatically logged into the InfoTrack website where you can perform your search.

(If you haven't entered your InfoTrack username and password into SILQ, refer to section 1.1 to see how to do this.)



An important thing to note is that when you are creating your matter through the **Update Matter** dialogue box, depending on the class of law chosen from the **Class** drop down menu, the fields in the **Details** Tab will dynamically update.

It is important to fill in all the fields in the **Details** tab as well as the main Correspondent in the **Client & Correspondent** tab as all this information will automatically be pulled out from the matter and transferred to the InfoTrack website, so you wont need to retype this information when doing a search. This will save you a lot of time.

The screen shots below illustrate both a Property Sale and Property Purchase selected from the Class dropdown menu and the Details tab for these Classes. You will notice how the fields in the Details Tab have changed depending on which Class of law has been chosen.

The screenshot shows the 'Update Matter' dialog box with the 'Class' dropdown set to 'Property Purchase'. The 'Details' tab is selected. The fields visible are:

- Class: Property Purchase
- Matter Num.: PARK0001
- Matter Desc: Estate of Parker
- General tab: Address (Seaview 5/ 10 George Street, Sydney New S), Purchase Price (15,000,000.00), Exchange Date (10/05/2014), Deposit (150,000.00), Stamp Duty Due (1/05/2014), Deposit Bond (25,000.00), Settlement Date (11/05/2014), Stamp Duty (0.00), Date Paid, Bank Ref, Initial Deposit (0.00), Balance Deposit (0.00), Balance Deposit, Building Report Completed, Pest Report Completed, Special Conditions, Status.
- Buttons: Save, Don't Save.

The screenshot shows the 'Update Matter' dialog box with the 'Class' dropdown set to 'Property Sale'. The 'Details' tab is selected. The fields visible are:

- Class: Property Sale
- Matter Num.: PARK0001
- Matter Desc: Estate of Parker
- General tab: Address (Seaview 5/ 10 George Street, Sydney New S), Purchase Price (15,000,000.00), Exchange Date (10/05/2014), Settlement Date (11/05/2014), Adjustment Date, Date Paid, Bank Ref, Status.
- Buttons: Save, Don't Save.

The screenshot illustrates the process of updating a matter in the InfoTrack system. The top window, 'Update Matter', shows the 'Details' tab with an 'Address' button highlighted in a red box. Below this, four panels show the 'Matter Address' window with different tabs selected: Address, Title, Council, and Crown Allotment. Each panel contains various input fields for property details and a 'Save' button.

Update Matter - Details Tab

- Class: Property Purchase
- Matter Num.: PARK0001
- Matter Desc: Estate of Parker
- Active Matter: ☒
- Address: **Address**
- Purchase Price: 0.00
- Exchange Date:
- Deposit: 0.00
- Stamp Duty Due:
- Deposit Bond: 0.00
- Settlement Date:

Matter Address - Address Tab

- Building Name:
- Unit No: Street No: To: Street: Street Type:
- Suburb: State: Post Code:
- Nature Of Building:
- Buttons:

Matter Address - Title Tab

- Title Ref(s) - separate with commas:
- Lot(s): Plan Type(s): Plan No(s):
- Section: Block: Stage No: Redevelopment No:
- Buttons:

Matter Address - Council Tab

- Parish:
- Locality:
- Council:
- Council Property No: SPI:
- Buttons:

Matter Address - Crown Allotment Tab

- Allotment: Block: Section: Portion:
- Sub Division: Parish:
- Buttons:

Within the Details tab for both the Property Purchase and Property Sale classes there is an **Address** button.

Clicking on this button opens up the **Matter Address** window, which has four tabs, which includes Address, Title, Council and Crown Allotment. In each tab is where you can enter the address, title, council and crown allotment details for the property.

It is important to enter all the details that are relevant to the property, as this information will be transferred to the InfoTrack website when you do a search.

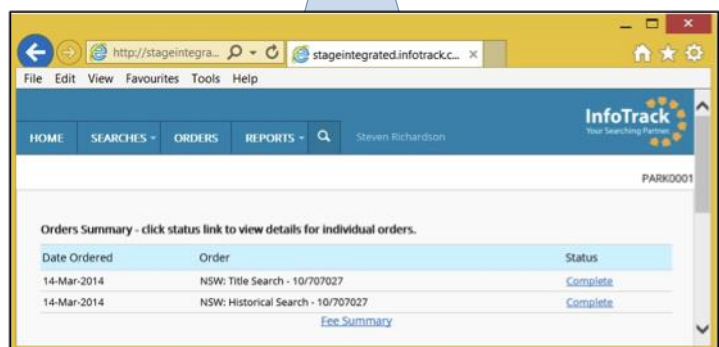
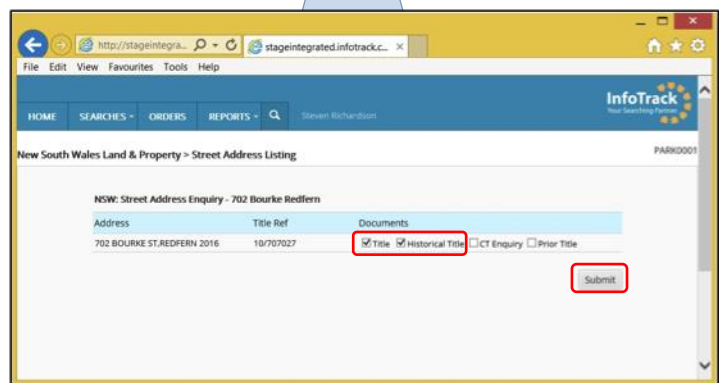
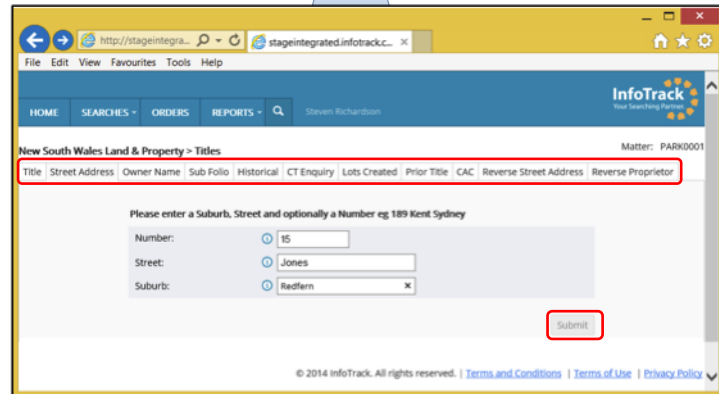
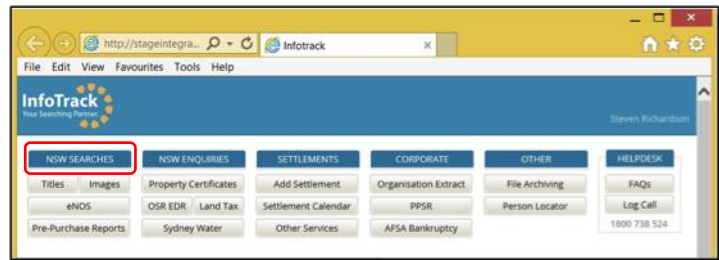
Once you have filled in all the details in the **Matter Address** window click on the **Close** button.

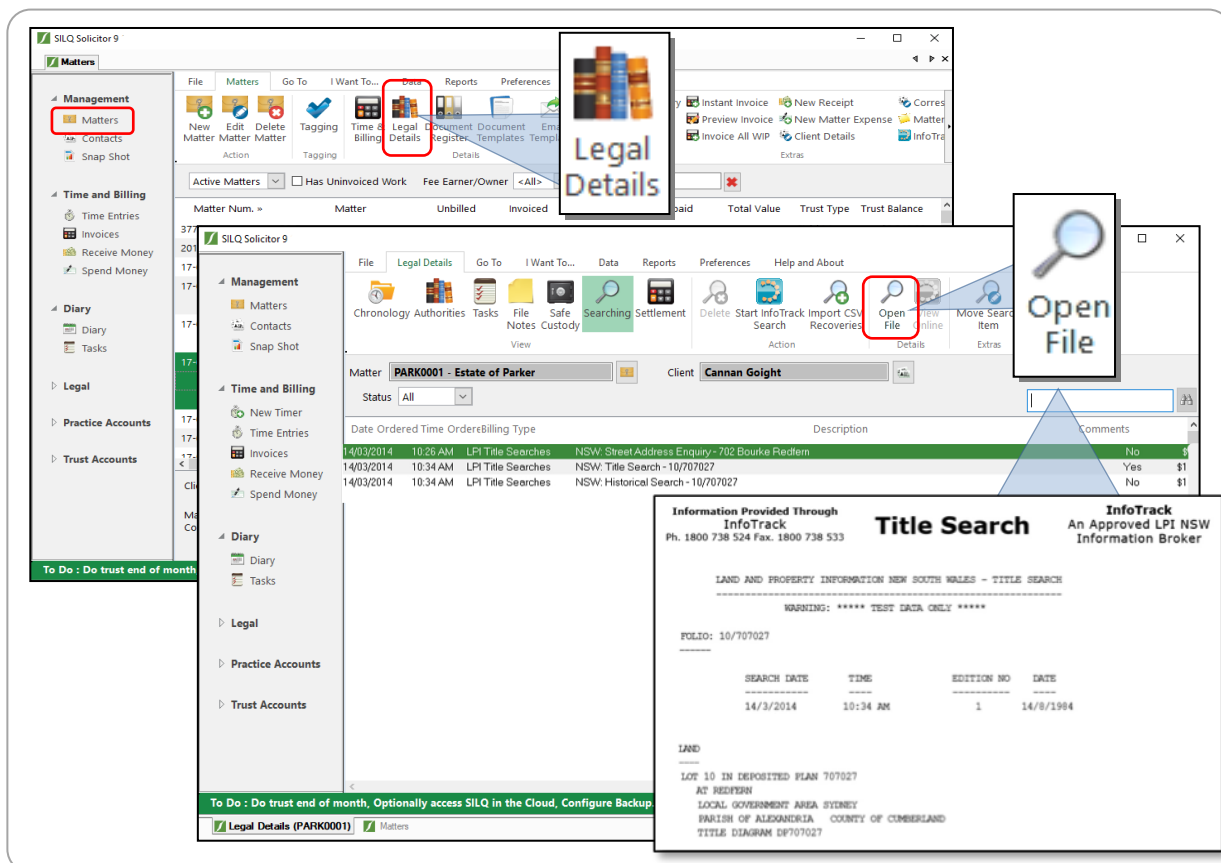
Once you are on the InfoTrack website to perform a title search, click on the **Titles** button under the heading NSW Searches.

Click through the various tabs on the Titles search page to ensure all the details are entered to perform the search. If you have entered all the required information into the Matter in SILQ, you will see that all this information has automatically been added to the relevant fields on the InfoTrack website. Next click on the **Submit** button.

You will have the option to tick what documents you would like generated. In the example to the right, **Title** and **Historical Title** have been ticked. Next click on the **Submit** button

You will then be taken to the order summary page.





You can now go back to SILQ and make sure the matter you ran a search on is selected. Next click on the **Legal Details** button in the top toolbar, which will take you to the Legal Details window for the matter, and then click on the **Searching** tab.

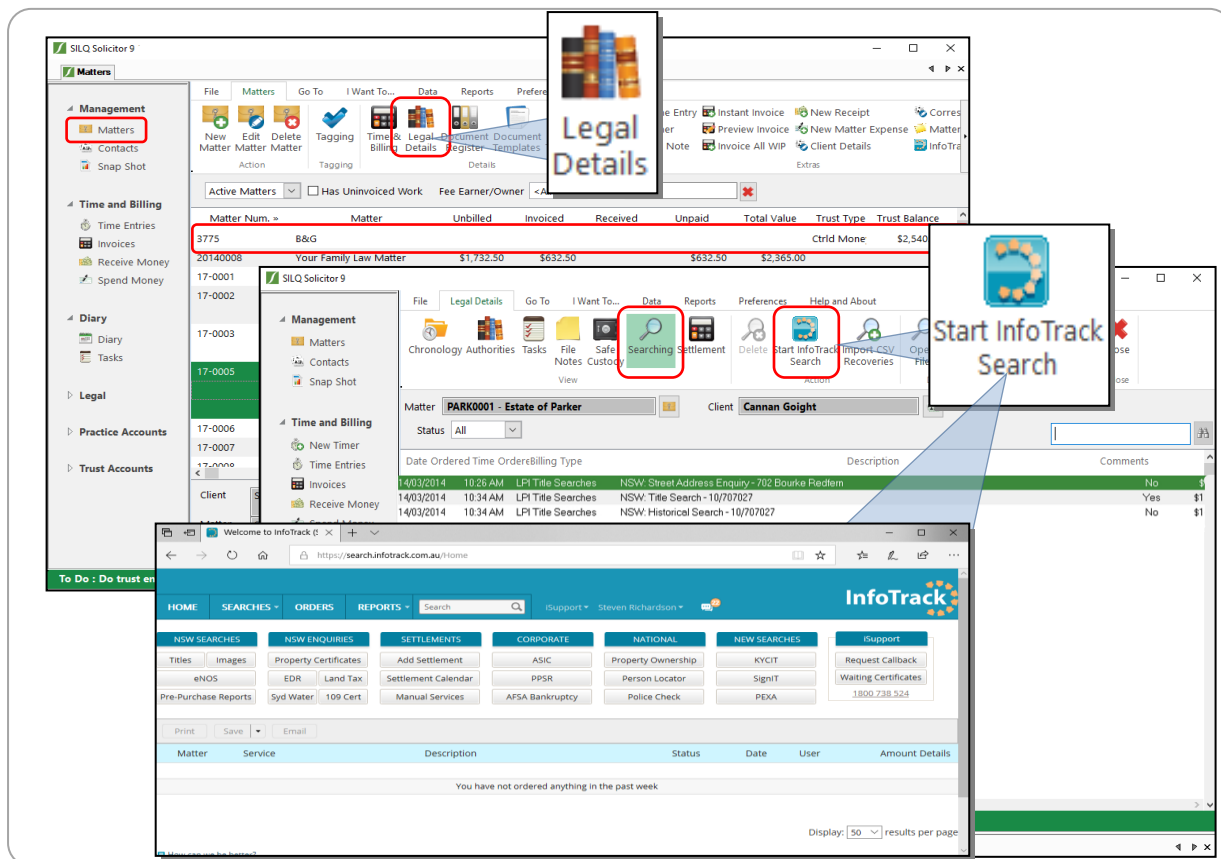
You will then see in the main window the searches you just ran on the InfoTrack website. If there is a downloaded file the **Open File** button will be enabled on the top toolbar, but there is not always a downloaded file and in this case the button will be greyed out. If the **Open File** button is enabled, to view the document, click on a document to highlight it, and then in the top toolbar, click on the **Open File** button, and your document will open to be viewed or printed.

These documents have been automatically downloaded from the InfoTrack website to your documents folder within SILQ and are also available in the document register.

In the right-hand side toolbar, you will also see a **View Online** button. Some documents have the ability to be viewed online on the InfoTrack website. Clicking on that button, will launch the InfoTrack website and it will reopen the document in your web browser on the InfoTrack site and you will be able to continue to make further searches in relation to that matter.

NB: When the results come back depending on the search it may come back immediately or take weeks depending on InfoTrack, though as it progresses through different statuses it will update the status in the searching window.

3.2 Doing an InfoTrack search from the Legal details screen



NB: Please note this is just a basic example of doing a search. You will need to contact InfoTrack on how to do a comprehensive search on their site.

To perform a search from the Legal Details screen, navigate to the matters screen by clicking on the **Matters** button on the left navigation menu bar.

In the main window of the matters screen, click on the matter once that you want to run a search on. It will highlight in green.

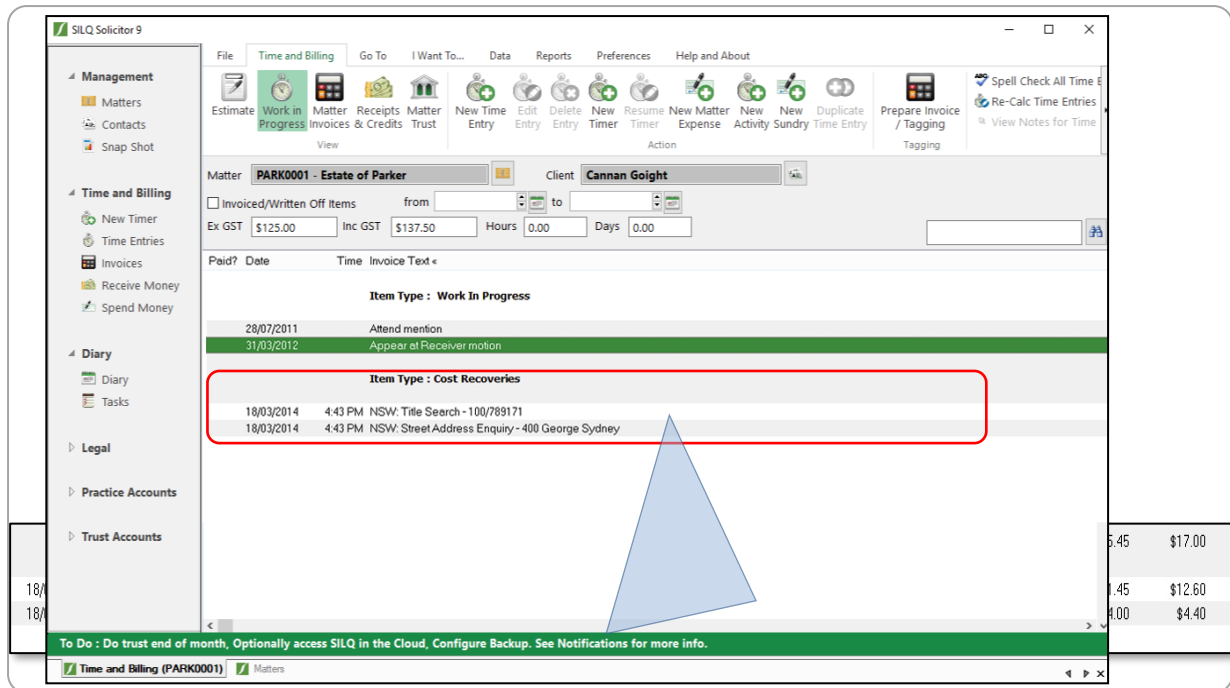
Next click on the **Legal details button** in the top toolbar and you will be taken to the Legal Details screen. Then click on the **Searching** Tab in the Legal details window.

To perform an InfoTrack search, click on the **Start Info Track Search** button in the top toolbar. If you have entered your InfoTrack username and password into the Systems Settings area of SILQ, your web browser will launch and you will be automatically logged into the InfoTrack website where you can perform your search.

(If you haven't entered your InfoTrack username and password into SILQ, refer to section 1.1 to see how to do this.)

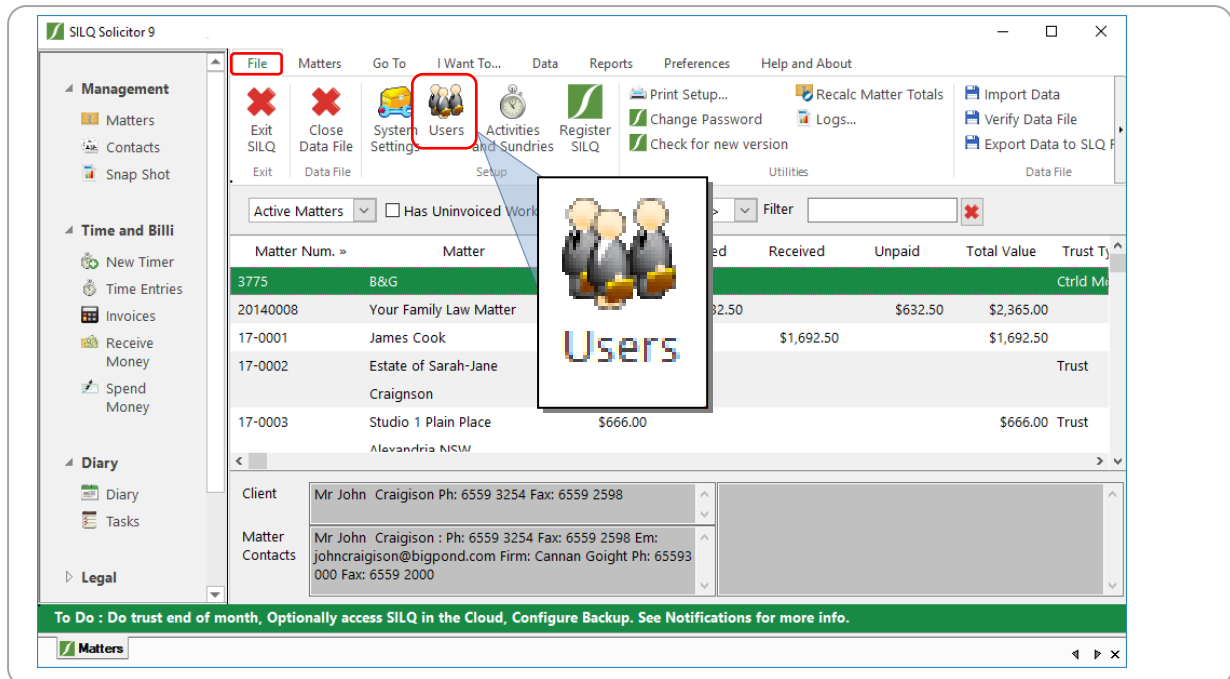
To see how to do a basic search on the InfoTrack website, refer to page 7.

4. Invoicing the client for search costs



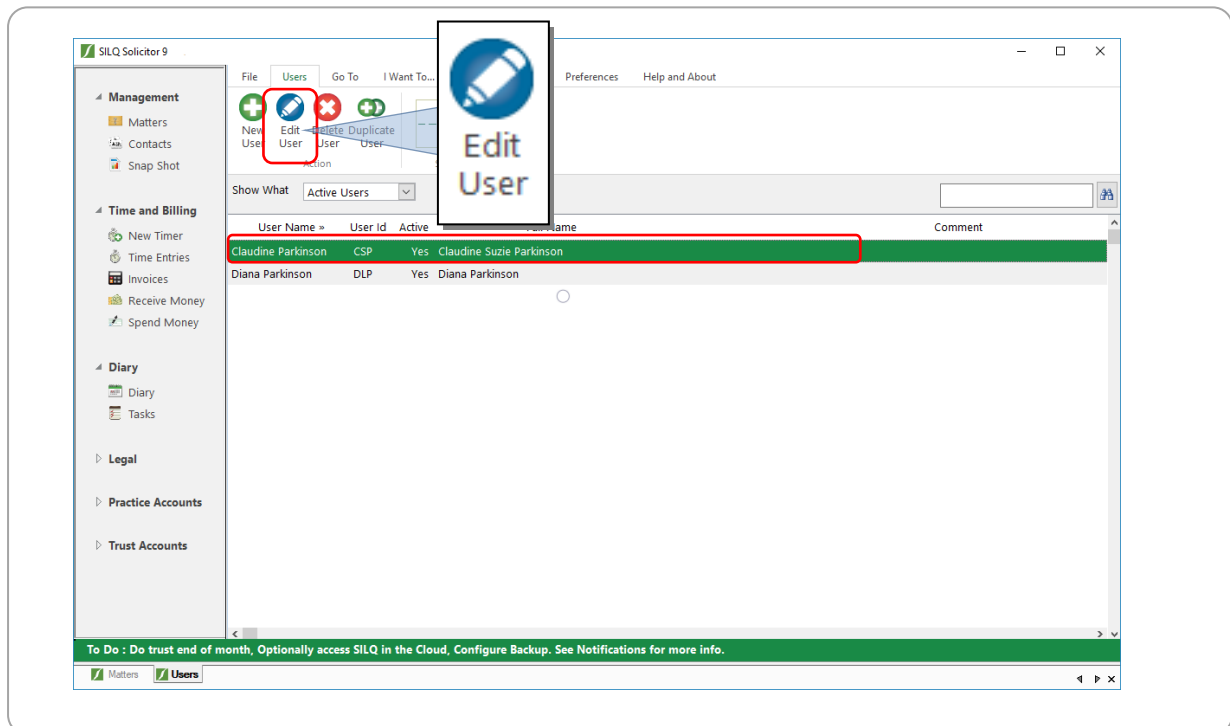
The benefit of using InfoTrack to do your searches means that the cost of every search is placed against the matter you are running a search on, and it appears in the **Time and Billing** Window in the **Work in Progress** tab along with all your other time and activity entries ready for invoicing.

5. InfoTrack Security Settings



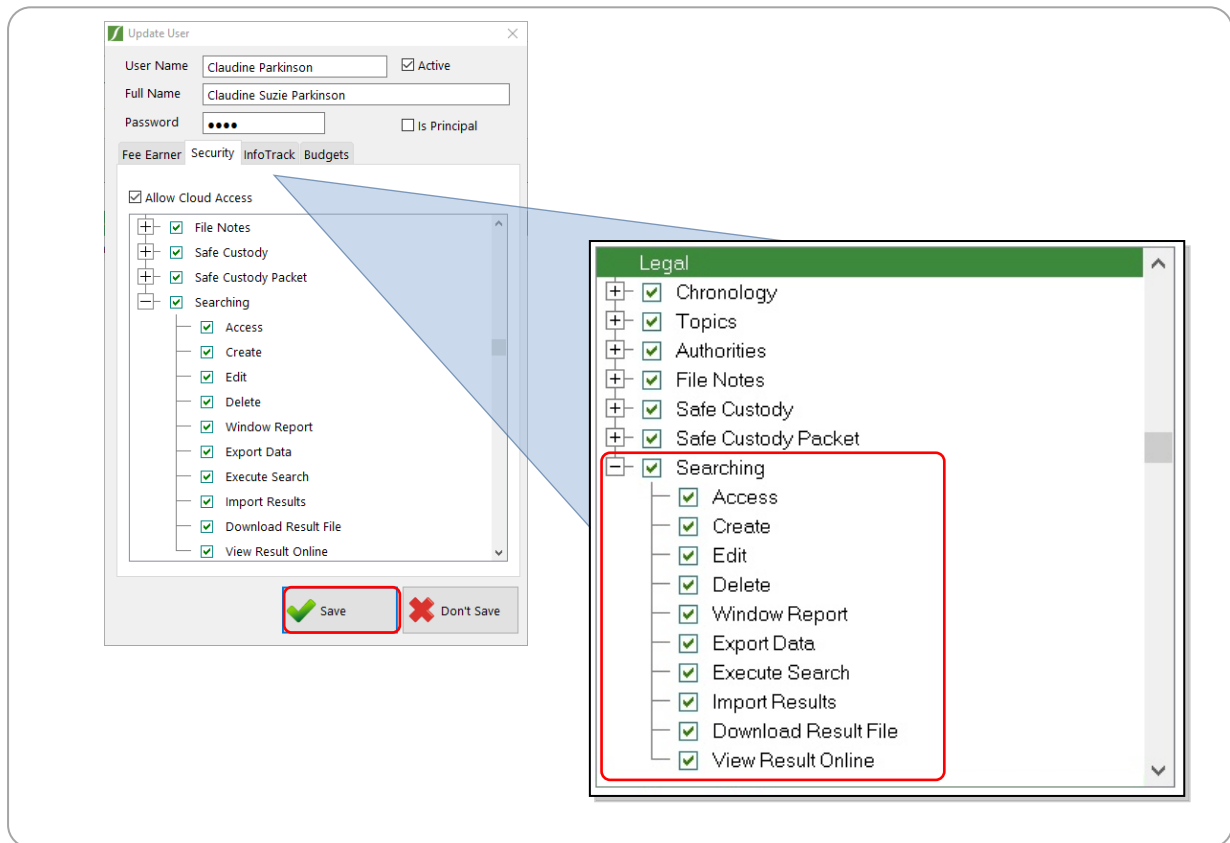
SILQ allows you to control who has access to InfoTrack searching. This is an essential feature if you wish to restrict certain users from accessing to this part of the system.

To restrict InfoTrack access, go to the **File** menu and then click **Users**.



This will show you the list of users for the data file.





Click on the user in the list you want to restrict access to and then click on the **Edit User** button in the top menu bar.

In the Update User dialogue box that opens up, there is a Security tab, which allows you to select what areas of the system the user has access to.

If you wish to restrict this user from accessing InfoTrack, scroll down to the **Legal** section, locate **Searching** on the list and click on the '+' button to expand it.

You will then see a list of actions the user is allowed to perform when doing an InfoTrack search. If you want to deny them access to any of these actions, click on the tick box to the left of the action to remove the ticks.

When you are finished click **Save**.

Note: You can put in an individual users infotrack login details under the Infotrack tab.

