



# Osprey Approach: Setting Up InfoTrack Integration

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The latest version is always online at  
<https://support.ospreyapproach.com/?p=29963>

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Osprey Approach offers integration with InfoTrack, allowing you to run InfoTrack searches. To use these, a Supervisor level user will need to ensure that the integration has been set up.

If a user attempts to select InfoTrack without having their credentials set they will get the following message.

test.ospreyapproach.com says

Please setup your InfoTrack user account in Supervisor > System Setup > Users, before proceeding with InfoTrack integration .

OK

The credentials can be set by going to Supervisor > System Setup > Users, right click the user in question and click Edit.

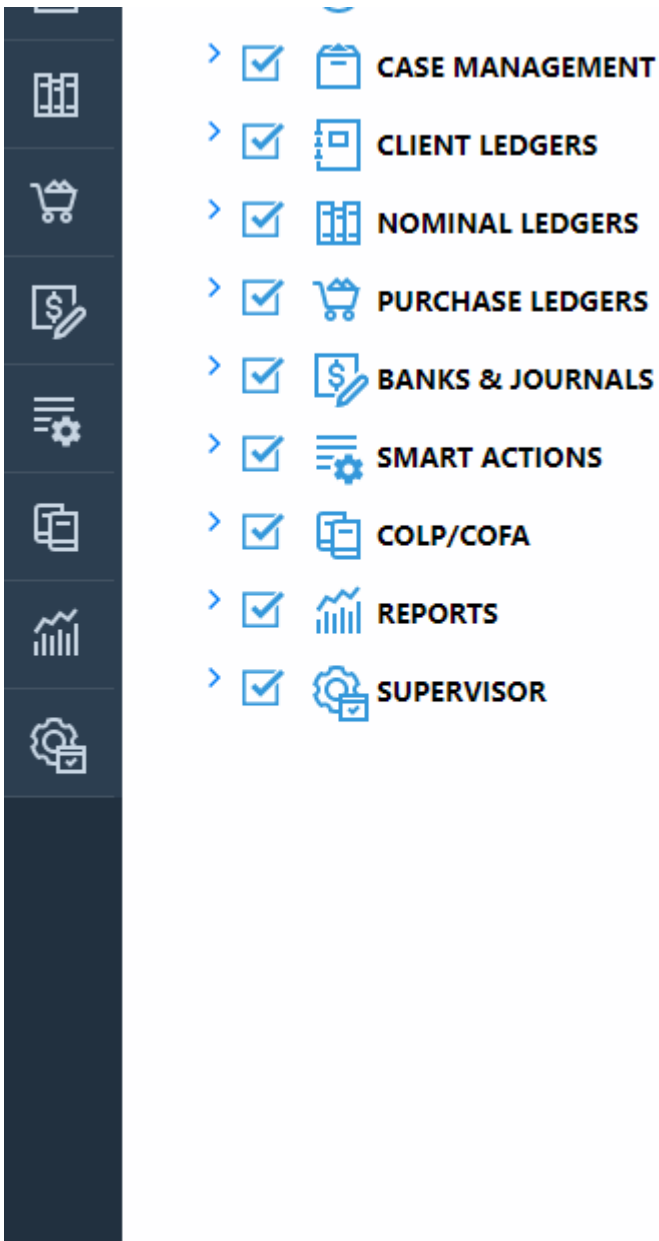
Scrolling to the bottom of the page you can fill in the InfoTrack credentials and then click Save at the top.

### InfoTrack Account

Username:


Password:

You can map the Osprey fields to the fields of InfoTrack.



Select Supervisor > Case Management Setup > InfoTrack Field Mapping

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 Add field mapping

InfoTrack Fields	Matter type	▼
<input checked="" type="radio"/> Client <input type="radio"/> Dossier		
Available Tables	accuser	▼
Available Fields	EMAIL_ADDRESS	▼

Select the InfoTrack Field

## Add field mapping

InfoTrack Fields

Client  Dossier

Available Tables

Available Fields

1 2 3 4 5 6

Choose either Client or Dossier and then select the appropriate Available Table and Field to map to

Click Add field Mapping, the mapping will appear underneath, repeat the process with any further fields.

INFOTRACK FIELD DESCRIPTION	TABLE NAME	FIELD NAME	DELETE
Matter type	ALEXHTEST1	AEH_SOL_1_REF	
Property 2nd purchaser address building name			
Property 2nd purchaser address county			