

e-track – Using the iCal Function

This is a guide showing how to use the iCal functionality to add visits to a calendar such as Outlook or Google



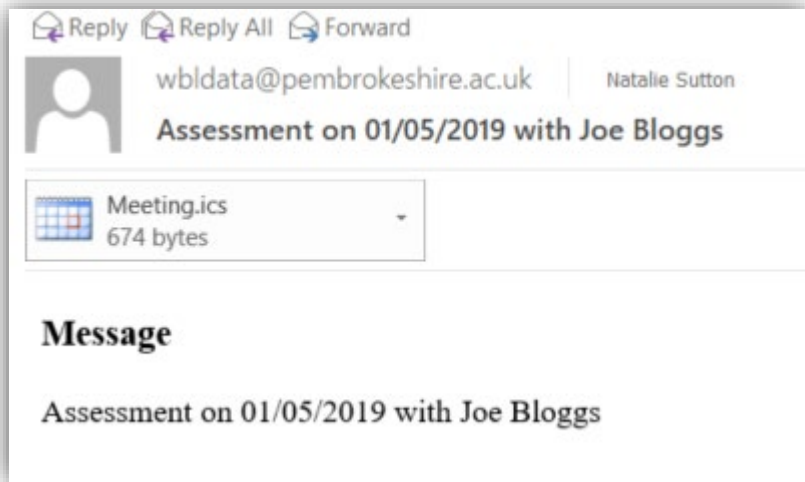
The iCal functionality within e-track allows you to send ics files via email to learners and/or assessors when visits are created in e-track. These emails can then be added to calendars such as Outlook or Google either by opening the file and adding it to your calendar, or by accepting the calendar invitation if sent to you by someone else.

When you add a visit in e-track (refer to ***e-track Online Assessor User Guide***) there is an option at the bottom of the **Edit Appointment** tab to send iCal notifications to both learners and/or assessors.

Enter the planned details of the visit i.e. the visit type and the date and time of when you expect it to take place. **NB.** *You can add notes to the visit so that you and/or the learner know what will be covered at that visit but these notes will not appear in the calendar entry that is generated.*

Tick the relevant box to send an iCal notification to the assessor or learner or both. Click **Save** to save the visit to the learner's diary.

A screenshot of the 'Appointment' form in the e-track system. The form is titled 'Appointment' and has a breadcrumb trail: 'Home / Browse Trainees / Bloggs, Joe / Visit'. It features a left-hand sidebar with fields for 'Assessment' (set to 'Assessment'), 'Assessor' (set to 'Lingwood, Natalie'), 'Planned' (date '01/05/2019', time '11:00 to 12:30'), 'Actual' (time '00:00 to 00:00'), 'Outcome' (set to '[empty]'), and 'Travel Time' (set to '00:00'). There is also a checkbox for 'Please check to approve'. The main area contains a rich text editor with a toolbar (Bold, Italic, Underline, Strikethrough, Text color, Background color, Format, Font, Text color, Text background color) and a large text area. Below the text area is a 'Select file(s)' button. At the bottom of the form, there are two checkboxes: 'iCal to Assessor' and 'iCal to Trainee', both of which are checked and highlighted with a red box. To the right of these checkboxes are 'Save' and 'Cancel' buttons, also highlighted with a red box.



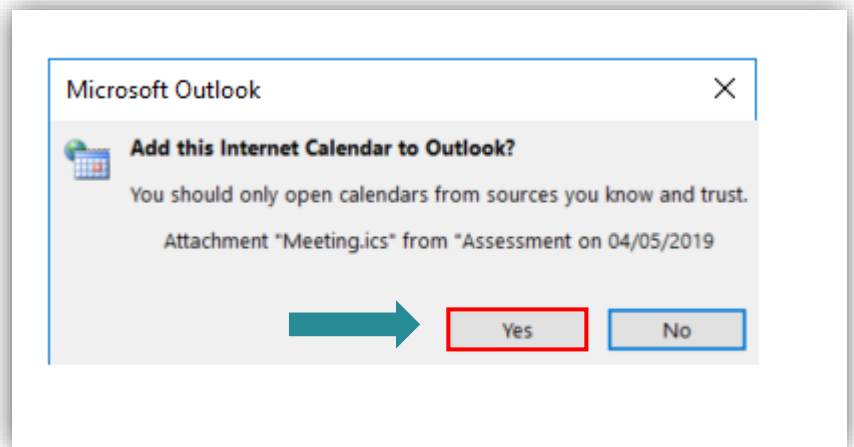
Outlook

If you are using Microsoft Outlook, you will receive an email with a meeting.ics file attached to it.

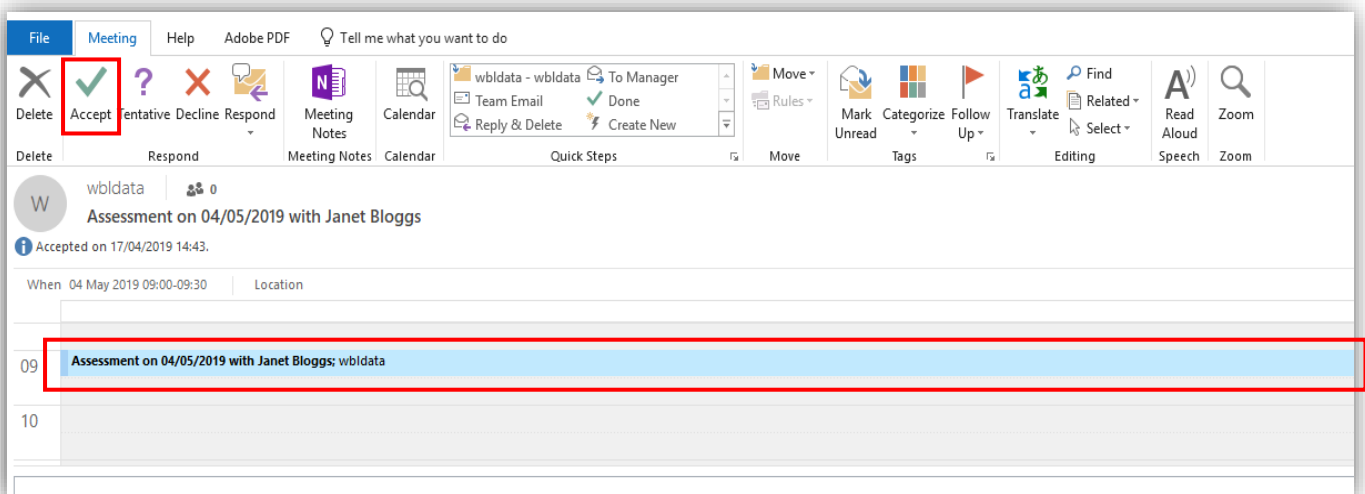
Double click on this file to open it.

A pop window will appear asking you if you want to add this to your calendar.

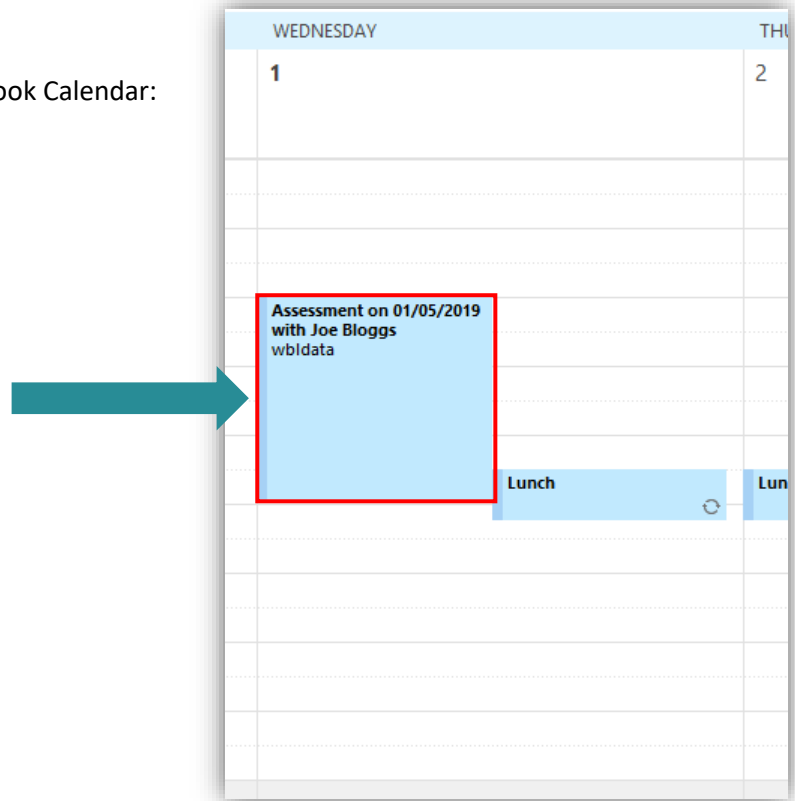
Click **Yes**



This will open an appointment window. To accept this appointment and add it to your Outlook calendar just click **Accept**



This appointment will now appear in your Outlook Calendar:

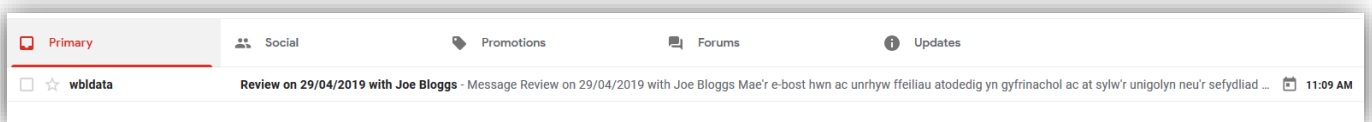


If you then need to change the time and date of this appointment at any time, you can amend the visit in e-track, tick the iCal boxes again and then click **Save**

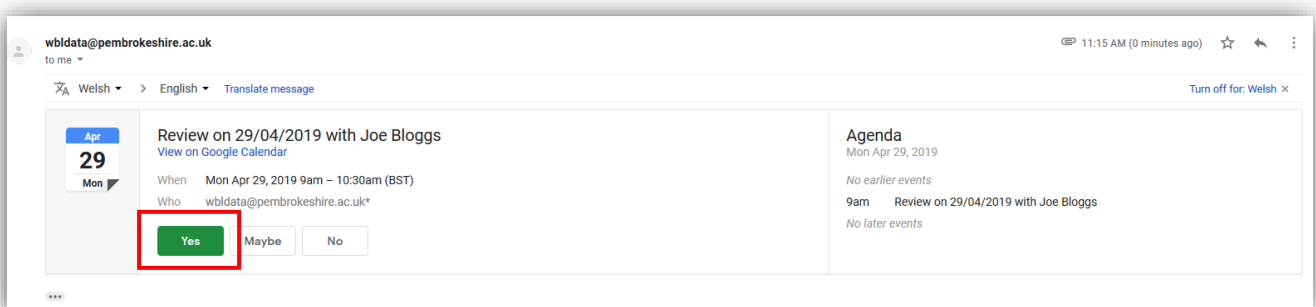
This will send through another email invitation which, if accepted, will replace the previous one in your Outlook Calendar.

Google

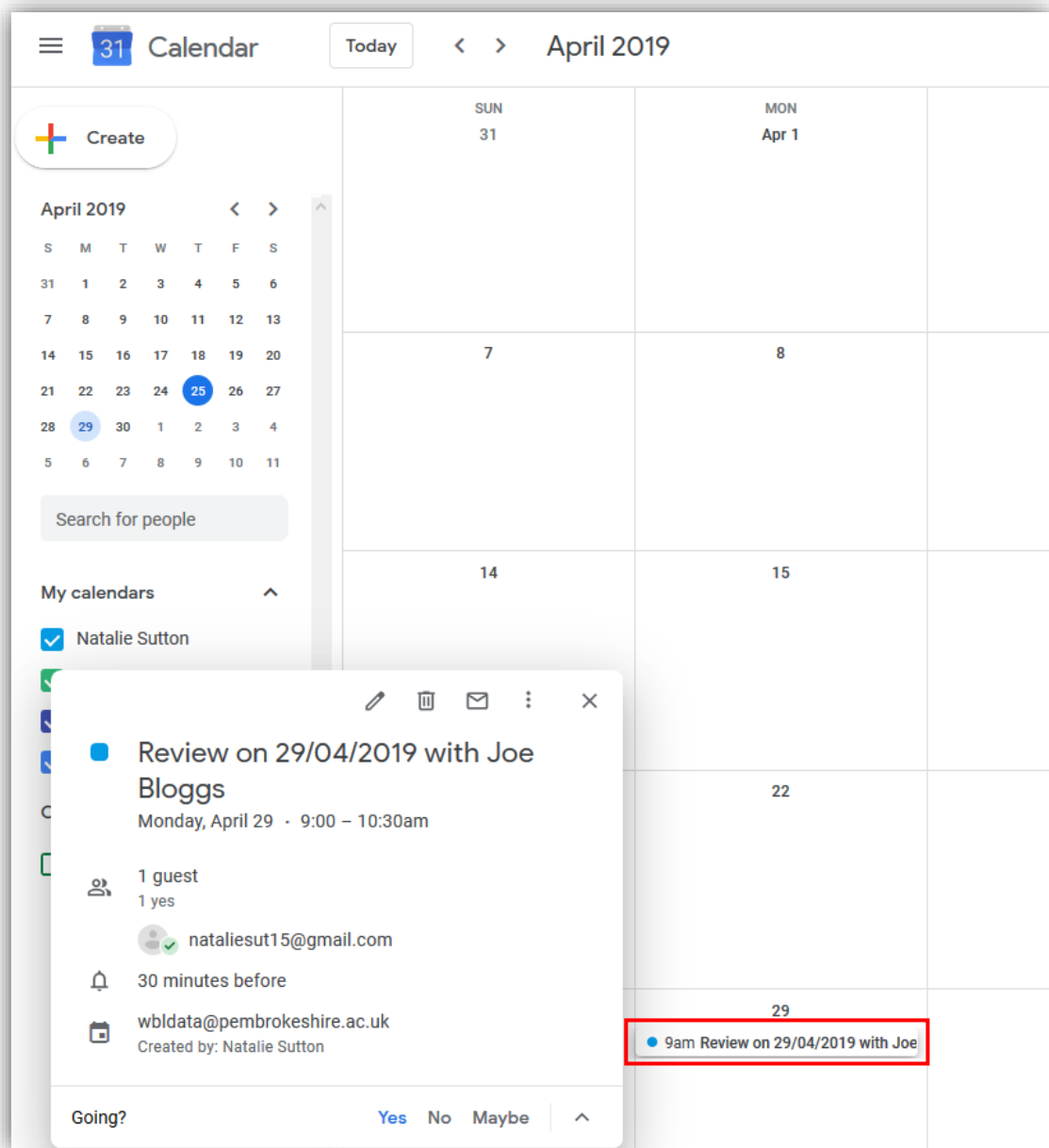
If you are using Google you will receive an email containing an appointment invitation:



When you open the invitation, you can accept it by clicking **Yes**



Once accepted, it will then appear in your Google Calendar:



If you then need to change the time and date of this appointment at any time, you can amend the visit in e-track, tick the iCal boxes again and then click **Save**

This will send through another email invitation which, if accepted, will replace the previous one in your Google Calendar.