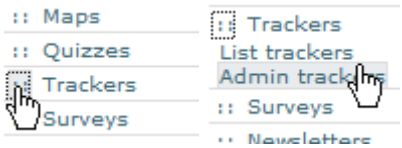
The screenshot files on this page are outdated and should be replaced with the latest version
Trackers User

When Trackers are enabled and you have the right permissions, a Trackers menu is visible, and can be clicked open. From here you will be able to create and administer your Trackers data collections.

Creating a Tracker

From the Admin Menu

Collapsed and Expanded Menu:



There are usually two options in the menu — List Trackers and Admin Trackers — and the options may change depending on your permissions. In this section, let's examine each option in detail.

Prior to Tracker Creation

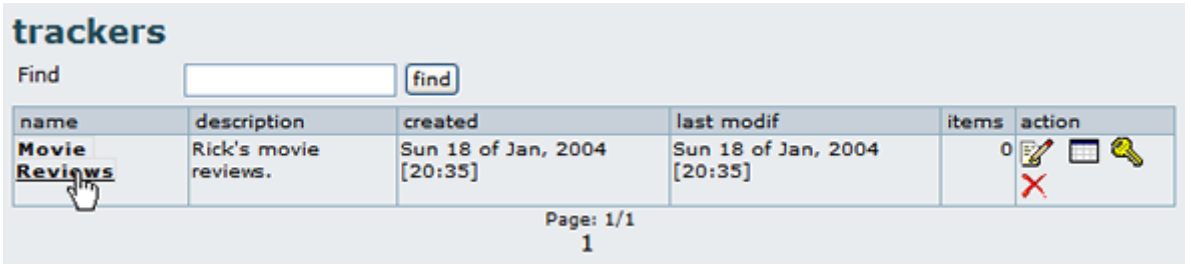
Prior to creating a Tracker, clicking on the Trackers menu displays an empty center panel, as shown here:



Creating a New Tracker

see: Creating a Tracker

Once Tiki creates the Tracker, it will be listed like so in both Admin Trackers and List Trackers:



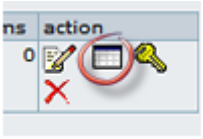
Actions

If you hover your mouse above each of the Actions icons, you can infer that they link to tools including:

- **Edit**: edit the Tracker information using the same form you used to create the Tracker. Here, you can change Tracker information, its categories, or how to handle comments.
- **Fields**: edit the Tracker's collection of fields.
- **Perms**: configure permissions for the Tracker (if you are an admin).
- **Remove**: remove the entire Tracker and its data. Use this with care, as it is a permanent operation.

Adding Fields to a Tracker

To make a Tracker useful and usable, you add some fields to it to capture the data you want to collect. You can administer fields by going to the the Trackers list, and clicking the Fields Action.



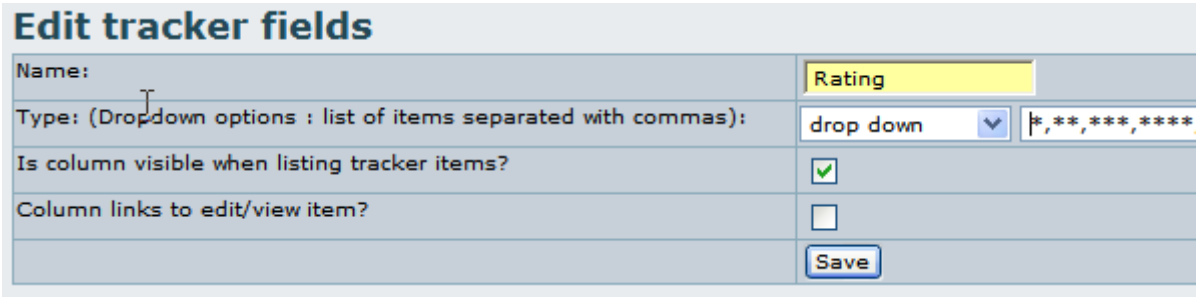
To add a field, click the Fields action from the Trackers list, then fill in the form that appears indicating the field name, field type, and any applicable options. Some of field types:

- Text input
- Textarea input
- Drop down combo (enter options separated by commas)
- Checkbox ("boolean" on/off yes/no true/false fields)
- Date/time field
- ....

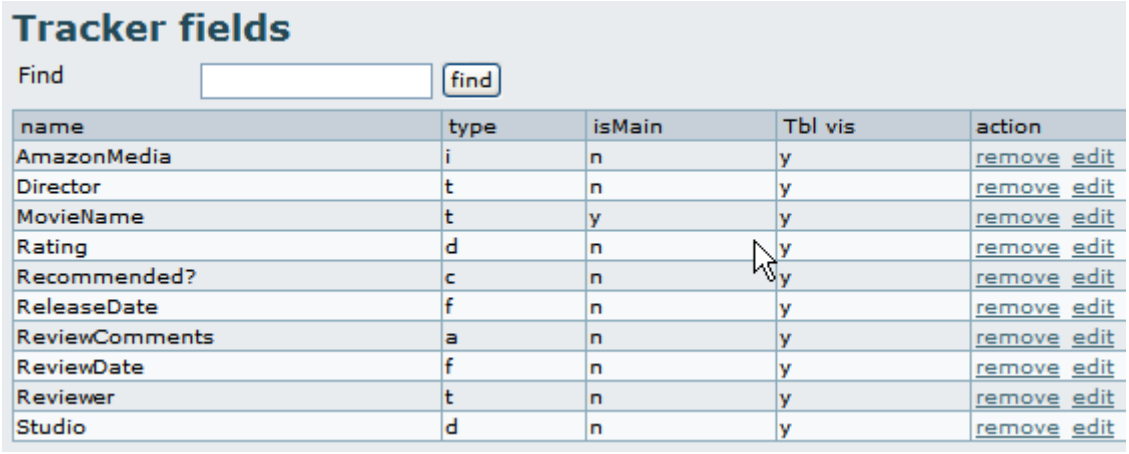
At least one of the fields in your Tracker must be the "main" field, which links to the item's details from the Tracker listing. This attribute is controlled by the "Column links to edit/view item?" checkbox. You can also indicate if the field is visible or not in the Tracker item list using the "Is column visible when listing tracker items?" checkbox. If a Tracker has a lot of fields you may want to use this checkbox to remove some of them from the item listing, for easier viewing.



Some Tracker field types have options you can set. For example, the drop-down field's items are entered separated by commas. In this graphic, you can see this Tracker will track movie reviewers' ratings using a drop-down field, with five "star" rating entries: *,**,***,****,*****. It is easy to think of various creative uses for this powerful tool - problem severity or impact levels, task priority, status, or a client's credit rating.



Once you have entered several fields, defining their type, options and visibility, you will see a list similar to this one:



Note in this graphic the "is main" column. A "y" or yes, means you have checked the "Column links to edit/view item?" checkbox. The list also indicates whether a field will be visible in the item listing, and allows you to edit or remove fields accordingly using this list's Actions.

Hint: One default field in any tracker is the "Status" field, which tracks whether an item is open or closed. This field is *not* visible in the Fields listing.

Using Trackers

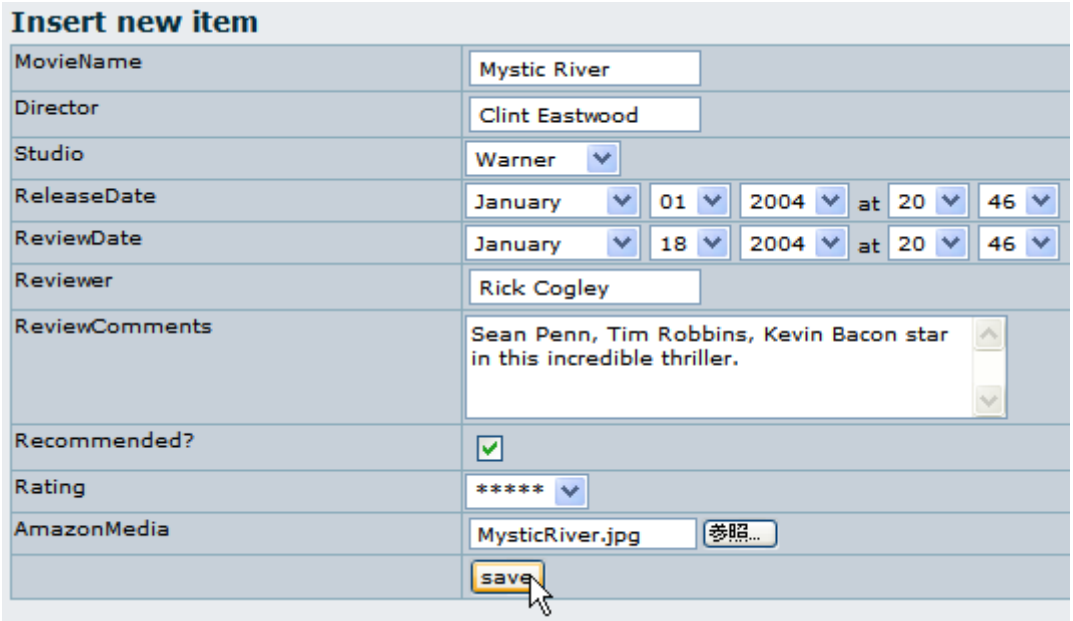
You can view a list of your Trackers by clicking Trackers from the menu. The center panel will change as such:



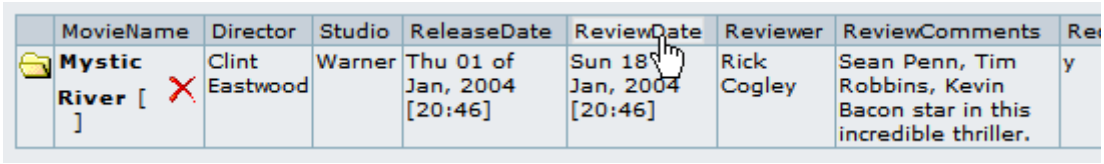
Clicking on a Tracker's name (here, Movie Reviews) will take you to a screen in which you can add, modify, delete, filter and sort items, and, toggle email monitoring on changes to the Tracker.

Adding a Tracker Item

To add an item into your Tracker, enter the information into the fields on the form at the top of the screen, and click Save when you are finished:



After saving, our movie review Tracker now has one review - for the movie Mystic River. In the item list part of the screen, you can see all the visible columns contained in your Tracker, as well as sort by create date, modification date, status, or any other available field.



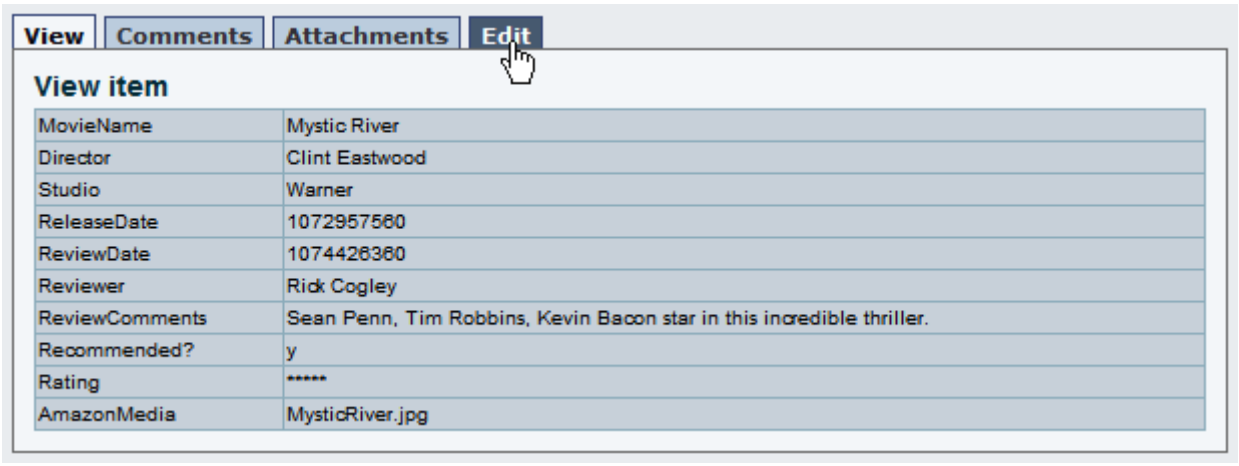
	MovieName	Director	Studio	ReleaseDate	ReviewDate	Reviewer	ReviewComments	Re
	Mystic River [ ]	Clint Eastwood	Warner	Thu 01 of Jan, 2004 [20:46]	Sun 18 Jan, 2004 [20:46]	Rick Cogley	Sean Penn, Tim Robbins, Kevin Bacon star in this incredible thriller.	y

Item Details

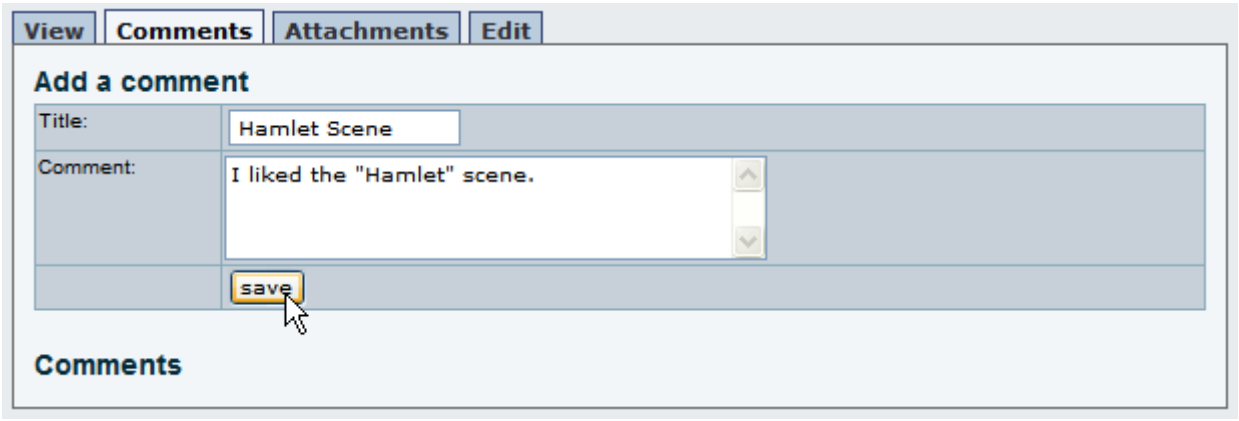
If you have the right permissions, you can click an item's title to bring up a "details screen" for the item, to modify it, or add attachments or comments.

Hint: If its title is not "clickable" then you can go to the admin screen and make some field the "main" field by checking the "Column links to edit/view item?" checkbox.

Click the title to display the item details:

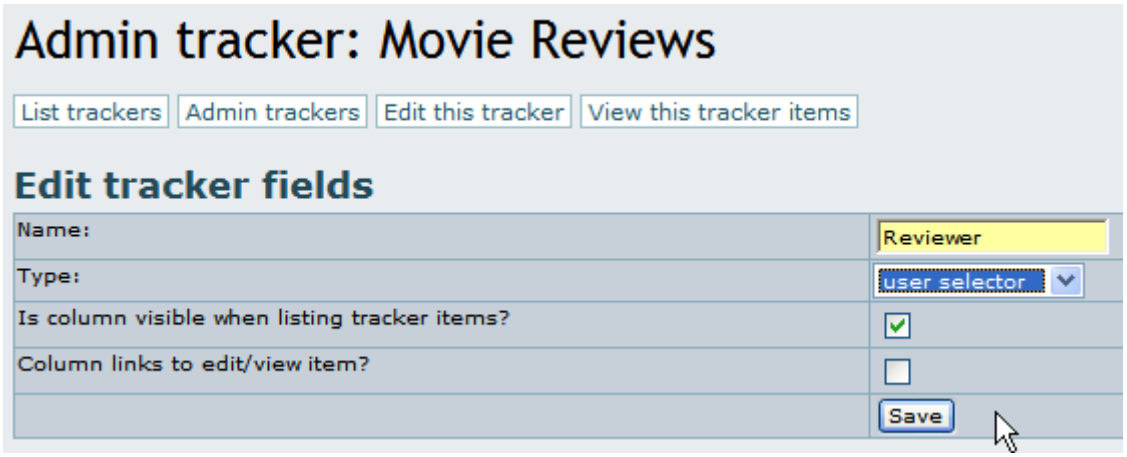


If attachments or comments are enabled, you can add them to your Tracker's items.

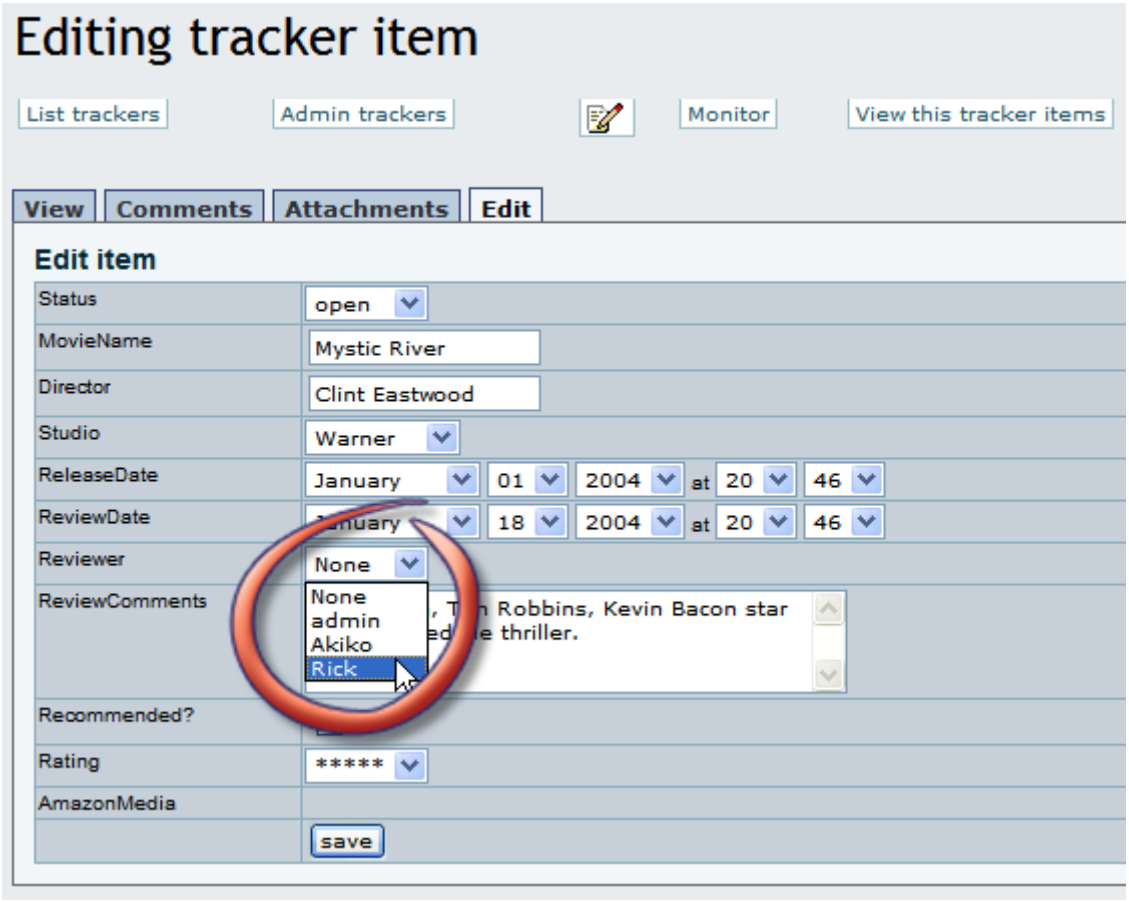


Assigning Items to Specific Tiki Users or Groups

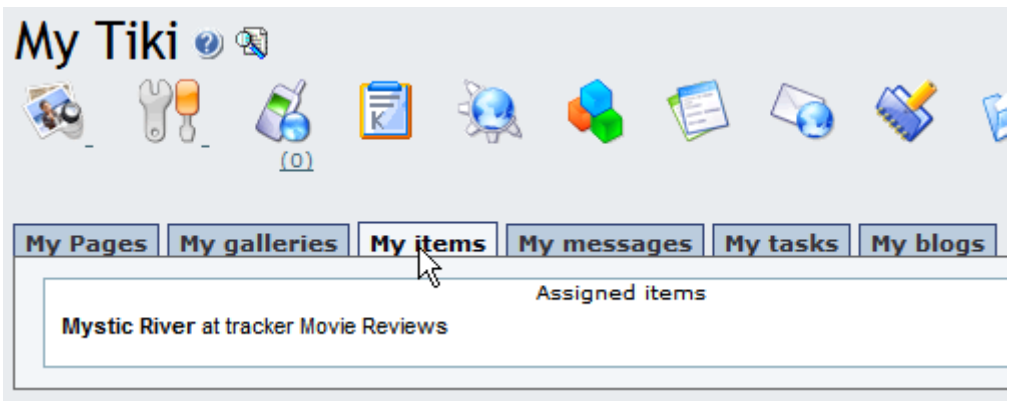
If you set up your Tracker with fields of type "user selector" or "group selector," you will be able to easily select from a drop-down list the users or groups registered on your Tiki site. First, we must change the Reviewer field in our Movie Review Tracker to be of type "user selector".



Once that is done, we can choose from the users on the site while editing the item.

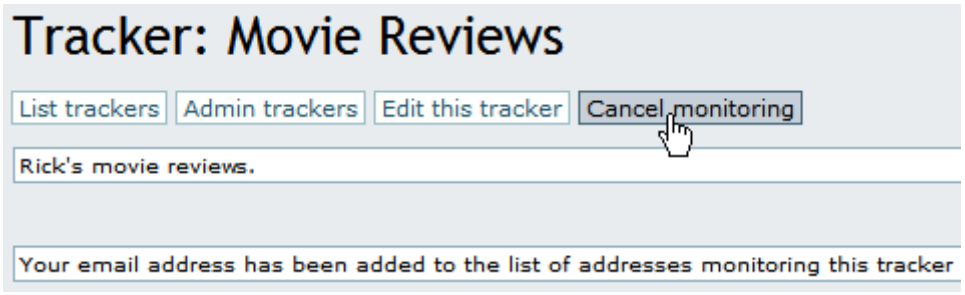


Tracker Items are always added with their built-in status field set to "open." Items with "open" status, which have been assigned to either your user account or your group, will be displayed in your My Tiki screen.



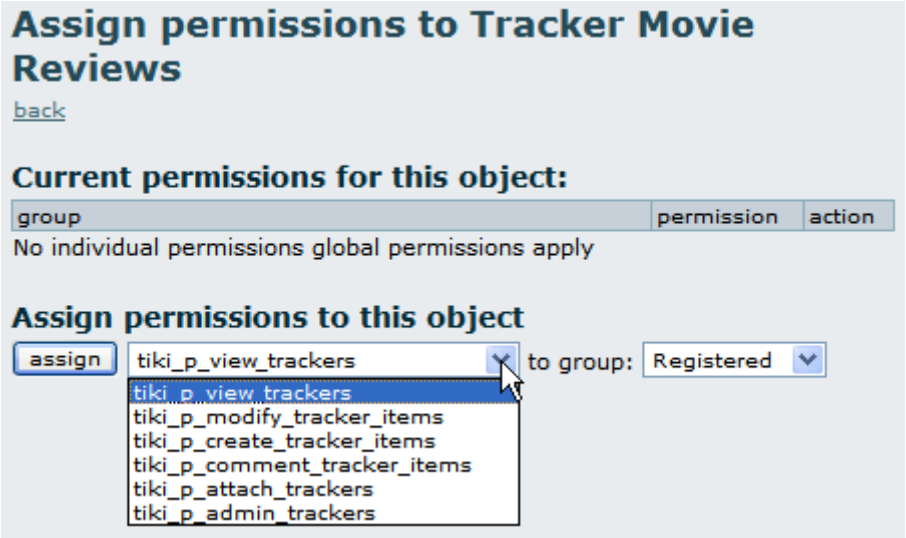
Monitoring Tracker Items

In the details screen, users can choose to monitor a Tracker, so that an email is sent by Tiki to the user, whenever the item is modified. Click the "Monitor" button to toggle monitoring off and on.



Setting Tracker Permissions

Permissions can be set to control access to Trackers. Note that you can set permissions globally or on a per-Tracker level. Assign permissions by clicking the "perms" link from the Tracker listing in the Tracker admin screen.



More documentation

- Tracker Details
- Creating a Tracker
- Adding fields to a tracker
- How to change tracker field types
- Adding items to a tracker
- Tracker Field Validation
- Tracker Field Rules
- Searching tracker items
- User Tracker
- Group Tracker
- Pretty Tracker
- Pretty Tracker in a Wiki Page
- Linking trackers
- Export trackers
- Tracker Inline edit
- Import Trackers
- Tracker Synchronization
- Tracker Admin
  - Improve Tracker Forms
- System Trackers

Related Information

- To enable Trackers for your site, see General Admin.
- For more information on My Tiki functionality, see MyTiki.
- To specify permissions for Tracker users, see Permissions for the general procedure.
- To administer Trackers, see Tracker Admin.
- For technical details, see Tracker Details.

Useful Links

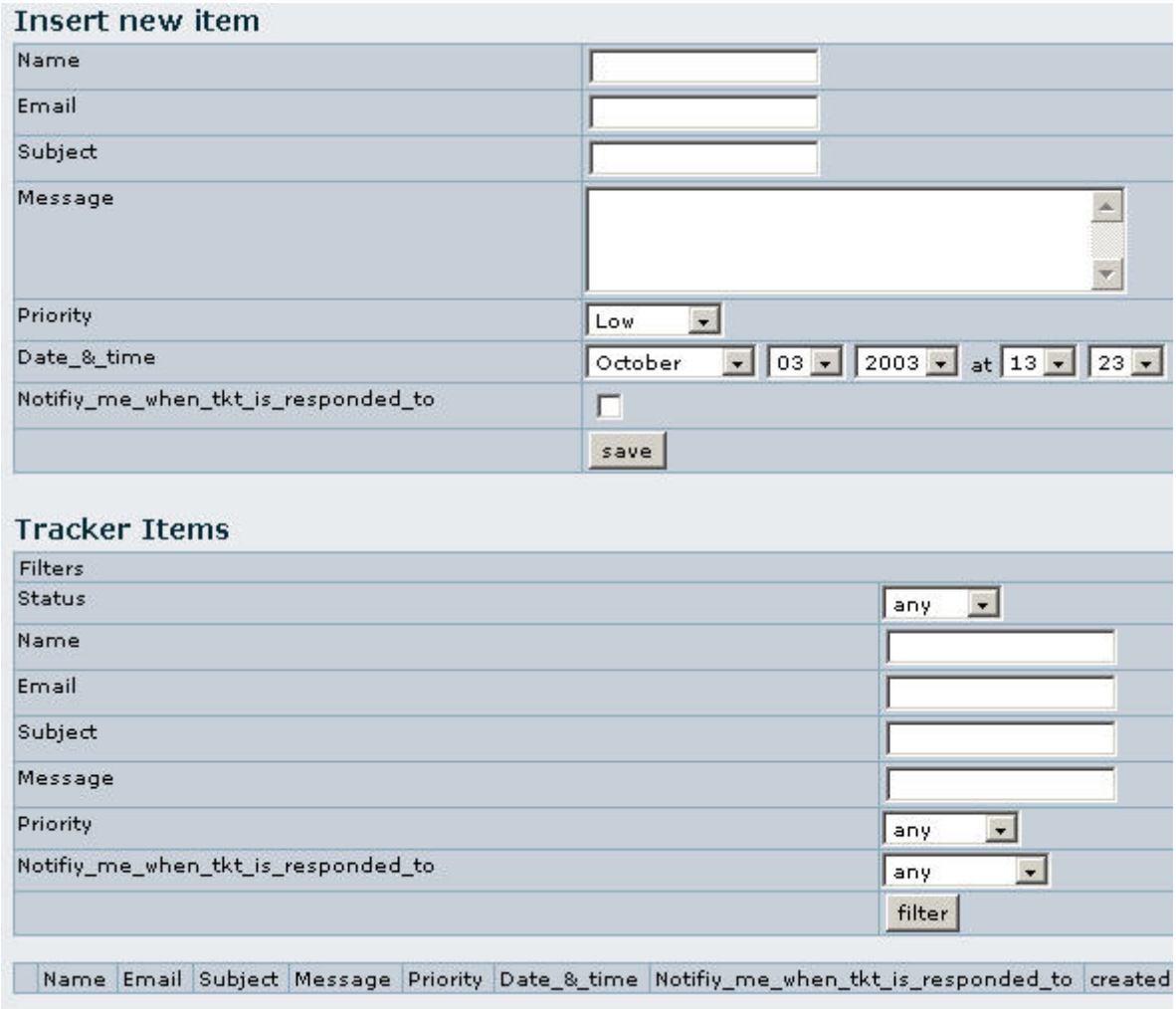
Editing Tracker Fields



After you have created a tracker you can:

- Enable or disable the Trackers feature.
- Set display of Trackers fields, such as status or create and modify dates.
- Enable and disable comments.
- Sort by name, dates or number of items.
- Categorize your Trackers.

Entering Tracker Items



Related Links:

- To enable Trackers for your Tiki site, see General Admin.
- To read the user manual for Trackers, see Trackers User.
- To learn about administering Trackers, see Tracker Admin and Trackers User.

Terminology

[+]

What Trackers are and what they aren't

The word tracker is probably a misnomer, form creator is probably better. This Tiki is running, at the time of this writing, 1.9 pre-release (CVS). These docs are geared for the 1.9 trackers but may in part be applicable to 1.8.2.

Trackers are really really cool. They are not perfect but getting better all the time. A huge issue is being able to convert other forms into the tracker interface. Simple text conversions are now possible with the import/export but that doesn't yet work for the tracker items. Please help us finish that part of the trackers!