Quick Tip

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Tutorial Intro

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Creating a tracker

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We will add more fields like incremental ID. We will also add a user name field that will associate a real Tiki user with the customers contact item this is a good start and I'm sure that after this tutorial you will be able to add other type of field and configure for your usage. I'll go in fast forward mode as anything I'll do to set my main tracker has been explained it in my previous video tutorial about the trackers feature . On this Tiki 19 using bootstrap 4 I log as admin and as the tracker feature is already enabled I can create my contact tracker. I give it a name, customers and set things very quickly.

I want to view the last modification date when looking at an item and I want them to be sorted by last modification date. I also want to be notified when an item is modified, so I add my email there we save and we are good to start with the field of this tracker.

Creating fields

The text field type is heavily used and it is important to understand what you can do with it. Let's review the essentials while we create our first field, first name.

- Same row as it says will display the field label on the same row than the input field.
- Display size is the physical length of the input field in character.
- Prepend, will be a string added before the field value.
- Append will be a string added after the field value.
- Maximum length is the maximum of character this field will accept.
- Autocomplete do what it says.

Validation will allow you to set condition to validate the field input content. This is usually case specific but one example would be to display an error message if something else than letters and spaces are entered. I have a REGEX pattern I use for International alphabet and if you need it you will find it on the transcript of this video on my website. https://www.bernardsfez.com

Now I write the error text to tell our user what to do. Use letters and spaces only, for example. We don't need to set permission for this field and advanced is not made for now. Let do some more text field, lastname, address, phone, mobile. It's looking good. I want to had some

field to the list view. Great now let's add our first item.

All good, we can check on the list it is working let's continue. It is possible to use several trackers together.

Link 2 trackers together

Back to the trackers page we create a second tracker to store our towns. I'll set up a first text field for the town and another for the town zip code as we will use it later. Quickly a first town with a zip code. A second. A third with the same label for the town than the previous but with a different zip code. That will be in good enough for now.

Back to my main tracker I'm adding the New town field. I select for the type the item link option and go to the advanced option. To link my two trackers correctly I select my town tracker I select the field that will be displayed here and make sure it is displayed as a value and not as a link, we want to display the town we don't want to go to the tracker item.

And finally I set one item per value field to display the label of one item without ID as I don't need to display the ID. I save back to my

contact tracker I can now select one town from my town tracker saving time and avoiding typos.

The Dynamic Items Link field type

But we can do better by adding the correct zip code field. We will use a field type that is not activated by default, the dynamic items list field type. To enable it I go to my trackers admin panel. I go on the field type tab, check the dynamic items list type and while I'm here I will also have the incremental ID field that we'll need in a minute. I apply my changes.

I go back to my tracker and add the zip code field. I select the dynamic item list type add the field and go to the options. I select my other tracker the tracker town I select the other tracker field that will be used to link with my current tracker. Towns in tracker 5.

I select the field from my current tracker that will be used to link with the other tracker, towns

in tracker 3.

And finally I select the field list that will be displayed on my current tracker.

The first times it required tests and small step but it is very powerful and flexible as you will see in time. Let's see now what we have in our tracker item.

I go now on my tracker item I edit it and select the town field. And on the zip code field I have now the only two valid options for my town trackers to choose from.

There are many advantage to use this kind of method. In our case having an external tracker will make easier the maintenance or the modification for the town trackers and I can by giving the right permissions have an employee to fill the towns without permission to touch my main tracker that contain precious information about my customer.

Email field type

Let's add now an email field. There are few options for the way it will be displayed but a simple mail to link will do for now. There are also other options for notification. Great let's have a first look at our tracker and create some items to have something to work on. I create second item.

Save.

Good now I go back to the item list.

The tracker list view

Let's review the item list view. We can see buttons, actions for the tracker or to go back to the trackers list. We see a number of items and we see our items. For each item we have also an action menu. Again all the labels are understandable and you will catch what they do very quickly. But we don't see all the information of the new items I just created. We can customize the listing by clicking on the field button.

- There are checkbox for the field we want to see in the listing.
- Title is the reference string to link and to have a title for each item.
  It is important for you to know that there should be only one title field per tracker.
- The search box is to add a search option on the tracker listing page.
- The public checkbox has to do with search and displayedinformation.
- And finally a checkbox mandatory to select which field will be mandatory.

When filling them. I can also reorder the field. Whatever I do I need to save it using the Save all option at the bottom

of the page. As you can see I have an ID for each item.

Auto Increment field type

Let's talk about this and let's add the Auto increment field type. We have an ID for each of our item in fact each our Tiki object but while it exists in the Tiki database it is not an ID that you can use easily in your item. Let's see what we can do about this. We click on add a field, select the auto increment field type and let's name it customer ID. Let's see the options. We have a first series of parameter in case we decide to generate specific ID or we can use the internal ID of the item from Tiki. It's up to you but to show some possibilities let's say that for my accounting or statistics I want to create IDs that mean something. I set the starting value to 10,000. I prepend with a string cust- and I append with underscore 2090. I just save.

Let's create now a new item.

Save, and as you can see I have now an item ID that can be applied for every item that will be created.

User selector field type

Finally finally, we'll add a user selector field so our contact our customer item in our case are link to their real user on Tiki you know what I'm gonna do now add a field select user selector and save directly as there are no option I want to set here I edit an item and using the field username I assign this

item to the only user I have the admin.

Now you know how to do and if you need you can always check the Tiki documentation use the Tiki forum and the community or hire a Tiki consultant to assist you with the final tuning or customization you need.

That's it for today with this XL video. Indeed there are more to tell about trackers like a field types, tracker plugin, plugin list or smarty template. It will come, be patient. I hope you enjoyed this Tiki Express tutorial. To help me continuing those I need your support. Click on the like icon below that video, share the video everywhere you think it should be. I don't have enough time to work do the tutorials and care that every Tikiers have the opportunity to watch them so please make it available where you think it's need to be."
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      ["creationDate"]=>
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      ["videoRelatedPages"]=>
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- Trackers
- Trackers User,es
- Using Trackers for Group Information
- Text Tracker Field
- Auto-Increment Field
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Contact Management using Trackers

Bernard Sfez / Tiki Specialist - Sun 14 Apr, 2019

Description

In this Tiki Express Tutorial, We'll create a main tracker and we'll link 2 trackers together. I'll show you how to use several field type; Text field, ItemLink field, Dynamic Items List, Email field, Auto Increment field. I'll explain the Tracker Item list view... And I'll quickly show Diagram, a new feature in Tiki19.

Details

16:20
https://doc.tiki.org/VideoTutorial-40
8-Trackers-Feature-in-Tiki
Experience level: Beginner
User role: Administrator
Author's website:
https://www.bernardsfez.com

Transcript

Hello">https://doc.tiki.org/VideoTutorial-405-Features-and-Options-in-Tiki
Experience level: Beginner
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Transcript

Hello internet! I'm Bernard Sfez a Tiki Specialist.

In this video we will create together the start of a contact management system using several trackers.

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