

Creating a Tracker

This page explains the options available to create Trackers.

Create the Tracker

Step One in: *Five Steps to make Trackers*

| Step | Details | Help Page |
|-------------------------------|-------------------------------------------------------------------------------|------------------------------|
| 1. Create the Tracker | Admin names the tracker, and assign overall parameters and permissions | YOU ARE HERE |
| 2. Add fields to the Trackers | Admin defines the columns and type of information collected | Adding fields to a tracker |
| 3. Add items to the tracker | Users fill out the forms to create <i>items</i> in the tracker | Adding items to a tracker |
| 4. View or List the results | Use plugins to view a customized tracker output in a page | Viewing Tracker Results |
| 5. Assign Trackers to Groups | optional - trackers can also be used upon registration | Assigning Trackers to groups |

Once you have enabled the **Trackers** feature in your Tiki installation, you can set up a tracker. To create a new Tracker, click "Trackers" > "List Trackers" in the main menu to bring up a list of trackers available. By default there is no Tracker created yet. To create a new tracker click the "Create" button.



Prior to version 16.x there was a legacy interface as shown below in the 2.x tab. Since version 16.x by default Tiki is using new modal dialog interface to create and edit Tracker properties. In version 18.x you can still opt-out from using this new dialog method and use the legacy interface by setting it up in Trackers control panel.

Lets create your first Tracker by entering some basic information about it into the form shown below.

Create Tracker ×

General

Name

Description

☐ Description is wiki-parsed

Field Prefix

Features

Display

Section Format

Status

Notifications

Permissions

...



In Tiki, you can imagine Trackers as a data table, where the columns are named **fields** and rows are the **items** with some data values entered. Trackers can have any set of fields and any number of items. The columns, or fields, will contain the data about each row, or item, in the table. You can add, remove and list items that you want to track. You can add comments or attach files to each item tracked. You can assign users and groups to each item and, when the item is opened, it will appear in the user-preferences screen. You can monitor Trackers by email. Simple workflows can be modeled using one or more Trackers.

The Tracker fields are explained in the following table:

| Option | Choices | Explanation | Version |
|--------------------------------------------------------------------|-------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------|
| Name | Any alpha-numeric text | Name of the tracker | |
| Description | Any text | Longer description of the tracker or its purpose. Select the Description is wiki parsed option to allow wiki formatting in the tracker's description | Tiki >= 2.0. |
| Categorize: | Click Show categories to display/select from all available categories. | Use to categorize this tracker for searching and permissions purposes. This field appears only if you have enabled the Category option. | |
| Selected | all selected categories | allows multiple categories to be selected | |
| Auto create corresponding categories | Yes/No | | |
| Show status | Yes/No | Displays the status of an item to anyone viewing it. | |
| Default status displayed in list mode | Available status options: open, pending, closed | toggles the display status when an item is viewed | |
| Show status to tracker admin only | Yes/No | toggles visibility of status by permission | |
| Send copies of all activity in this tracker to this e-mail address | Any email address | Separate multiple email addresses with a comma. For example: <i>address1@tikiwiki.org,address2@tikiwiki.org,address3@tikiwiki.org</i> | |
| Use simplified e-mail format | Yes/No | The sent email will have for subject the content of the field subject if exists (otherwise the default one). The from header will be the user email of for an anonymous the content of the first email field if exists(tw > 1.9.7). The message will not be sent if the from is empty | |

| Option | Choices | Explanation | Version |
|----------------------------------------------------------|------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------|
| New items are created with status | Available options: open, pending, closed | Select the status for newly created items. | |
| Authoritative status for modified items | No change, open, pending, closed | | |
| Item creator can modify his items? | Yes/No | The tracker must include a field of type user with option 1 . | |
| User can take ownership of item created by anonymous | Yes or No | For tracker that allows anonymous to create and that allows item creator to modify his items and that does not allow other user to edit other items. As soon as a user edits an item created by an anonymous, the item is associated to him, and no other user other than him can after edit the item | tw >=4.0 |
| Only one item per user or P | Yes/No | The tracker must include a field of type user with option 1 . | |
| Member of the default group of creator can modify items? | Yes/No | The tracker must include a field of type user with option 1 . | |
| Show creation date when listing tracker items? | Yes/No | | Tiki>= 2.0 |
| Show creation date when viewing tracker items? | Yes/No | | Tiki>=2.0 |
| Show lastModif date when listing tracker items? | Yes/No | | Tiki>=2.0 |
| Show lastModif date when viewing tracker items? | Yes/No | | Tiki>=2.0 |
| What field is used for default sort? | Any tracker field, including: Item ID, Last Modified, Created | Note: You will need to create fields for the tracker first, before selecting the field to use for sorting. | |
| What is default sort order in list? | ascending, descending | | |
| Trackers items allow ratings? | Yes/No | | |

| Option | Choices | Explanation | Version |
|-------------------------------------------------|------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------|
| .with values | | | |
| .and display rating results in listing? | Yes/No | | |
| Trackers items allow comments? | Yes/No | | |
| .and display comments in listing? | Yes/No | | |
| Trackers items allow attachments? | Yes/No | | |
| .and display attachments in listing? | Yes/No | adds the attachments column to the List view | |
| Attachment display options | rank all options | selects the data columns to include when displaying attachments, in which order. | |
| Items can be created only during a certain time | Select the date and time between which users can create tracker items. | | Tiki>=2.0 |
| Show these fields in a popup | Trackers field ID | Enter the field ID of the tracker's fields to include in a popup window, when listing tracker items. Separate multiple IDs. For example: <i>1,2,5,6,9</i> | Tiki>=2.0 |
| | | From Tiki14, with Unified Index turned on there will be a list of fields to choose from. The index will need to be up-to-date for the list to appear properly - try rebuilding the index if Unified Index is turned on but the field choices aren't showing. | |
| Wiki page to display an item | wiki:pageName for a wiki page or tpl:tplName for a template | Replaces the standard tracker item view with a custom layout and formatting; using a wiki page or a tpl file as a template. See Pretty Tracker for instructions how to create the template. | Tiki>=5.0 |