

Video Id

408

Video name

Trackers Feature in #Tiki

Video description

In this Tiki Express Tutorial I'm explaining the basics of trackers.

What is the Trackers feature, how to enable the Trackers, how to create your first Tracker, how to create a form to collect information, I describe the basic and advanced tracker field types, I demonstrate the Mathematical calculation field, I review the Trackers global options and the tracker properties and I show how to use a plugin list to display a catalog from a tracker in a wiki page.

Tiki version

Tiki 15, Tiki 18, Tiki 19, any

Tiki experience level

Intermediate

Tiki user group role

Administrator

Prerequisite knowledge

Thumbnail

Warning: Undefined variable \$basepath in /home/tiki-doc/public_html/lib/wiki-plugins/wikiplugin_img.php on line 953



Transcript

To define `Tracker` has never been an easy task and this is because `Tracker` is not like Forum or Blog a ready to use feature were you set only parameters and options. `Tracker` is more to compare with Microsoft Access or Apple FileMaker Pro. As simple as I can define it, `Tracker` is a toolbox and a set of component built to directly interact with values to and from a database that can be used as a standalone or be integrated in conjunction with other Tiki features like Wiki pages. It may sound like an hermetic definition and may be it is, but let's go on and later I'll show you examples so you can really understand what is possible to with Tiki Trackers

Historically, it has always been a Tiki advantage to combine the best of two worlds, Wiki and Database. Using, Trackers and Wiki pages made Tiki able to deliver a Structured Wiki. Evolving with the internet that we know today this simple core idea has extended of course. Many improvements and technological breakthrough made by the Tiki developers turned Trackers, embedded within Tiki, into a web application builder. Trackers is powerful, it is unlimited and to better understand it I will show you how it work.

By the way I received a lot of messages and questions about a [previous Tiki Express Tutorial](#) and the way I integrated a

bootstrap designed website into Tiki. I was asked to continue doing so, so people have better ideas on how they can design their own Tiki. But I really feel it is better to show how to setup and configure Tiki using the default install. It will be very confusing for beginners if I do it on a customised Tiki so sorry for the Tikiers that asked but I will use the standard default install... You know what I will change things a bit and I will demonstrate the last chapter of this tutorial using a customised Tiki so we keep everybody happy. ☐

How to enable the Trackers

So, I log as Admin, go to the settings menu that open the Control Panels page, set my default to advanced for the preference filters, click on the Features panel and activate the Trackers feature. If you felt that I did all that too quickly for you I suggest you to view the tutorial I did about [Administration Tips in Tiki](#) where setting a feature is explained in details.

The Trackers menu is now available and first things first, let's create our first tracker.☐

How to create your first Tracker

To create our first tracker we have to go to main page of the trackers accessible under the List-tracker menu item.

We click on the create button and it open a modal and first I will set a name for my new tracker. I add a description to help users with what they are supposed to do and I check the Description is wiki-parsed checkbox so I can add Wiki markup. That's enough for this demonstration and I'll quickly review other options with you later during that video.

Back to my Trackers page I see the tracker I just created. It is empty for now and even blank, meaning no fields have been defined yet. To do so, you can click on the actions menu under the wrench as well as many other possible actions or you can click on the Tracker name. As I was saying nothing to see, yet.

I click on the Fields button to create my first fields.

I click on Add Field and it open the Add Field modal.

I set the Name of my field and I leave the default Text Field type.

My first field is set, let's add more with different field types.

I set a text-area and as I set it I would like to show you that for each field type you have specific options. For the text-area I set the field to display a toolbar above it.

I add a date field to store a birthday, I don't need the time so just the date will be good.

I set an Email,

A Radio buttons,

A Country field

As you can see by default there are already enough type field to create a complex tracker.

Ok done. Let's populate the first item.

Just fantastic ! In less than a minute we create what would have take an hour to be built by a programmer and, and it is not less important, it is embedded in a Tiki, a web publishing framework. Meaning it is ready to be used. A few set of permission this can be already a tool in use for your company or your organisation.

How to create a page to collect information for a tracker

We have a tracker now ready to store information so let's quickly create a form on a wiki page to populate this tracker.

I create a wiki page; My contact form

I add a title using heading 3: "Please fill the form below"

I go to the plugin help available after clicking on the question mark button of the toolbar.

Filter the plugin list with the word tracker. And from the long list of available plugins for tracker I select "Tracker" and you can see by the description that this is what I need. I fill the tracker ID field by selecting the right tracker.☐I select the fields I want the user to fill.☐

☐I let everything else as it is by default, but again a lot of options and possibilities for you to match exactly your needs. Just at the bottom I will add some text to confirm the informations were saved. Or better a remarksbox plugin so it look nice too:

Now back on the page lets pretend I'm a user and I have to fill this form.

Save, and we're all good.

Let's check in the tracker now. And I can see that my items was saved properly.

Let review some of the other field type.

Quick description of the basic tracker field types

To do so and to show you another way to access the fields of my tracker I go back to the Trackers page. On the same line of my tracker on the far right there is a wrench with an actions menu. I select fields and back on the fields page I click on the Add field and let's check together what is available by default.

- Checkbox so you can set a set of several checkbox for a multi-select option

- Country Selector, we saw it nothing to explain
- Date and Time field, that we've seen.
- Date and Time using a Date Picker.
- Dropdown where you can set manually the options
- Email also a field we've seen
- Files that interact with the File Galleries to attach document like image to an item.
- Header is a field, is a static title using the html heading sizes. It can also be used to toggle, show or hide all the fields after it.
- Icon that give option to add an Icon to an item.
- Item Link that give you the ability to cross-information between 2 different tracker, a kind like a foreign key.
- Location to show a map and a marker for the location. Note that to use this field you have to enable the Maps feature else nothing will be displayed.
- Multiselect to select several options in a field.
- Numeric Field to store numbers especially if you need them as numeric values for calculation.
- Page Selector to select a wiki page or create it that will be linked to this tracker item. I have to say that I don't remember me using this field as there is also a Wiki page fields that do much as the same as we'll see a little later. May be some legacy field.
- Radio Buttons, this also we've used and it is pretty obvious
- Static Text like header but without format or toggling
- Text Area, we've seen this
- Text Field, this one also
- URL, to enter an url and use it as an url
- User Selector to link or relate an item to an existing or a future Tiki user
- Wiki Page to enter content in a tracker that will be saved as a wiki page.

How to enable the tracker advanced field type

Those are available by default but there are many more and they'll give you an incredible number of tools to create your forms, reports or applications.

Let me show you how to activate them;

Setting, Control panel and click on the tile Trackers. As usual plenty of options, but let's keep on the Field Types so I click on the last tab and it display a huge list.

- Articles
- Attachment
- Auto-Increment
- Category
- Computed Field
- Currency Field
- Dropdown selector with "Other" field
- Dynamic Items List
- Geographic Feature
- Group Selector
- In Group
- IP Selector
- Items List
- Kaltura Video
- Language
- LDAP
- Mathematical Calculation
- Rating
- Relations
- Tags
- User Groups
- User Preference
- User Subscription
- Webservice

A lot of stuff here. You find a short description moving the mouse over the help tooltips.[]I let you discover them but one.

The power of Trackers and the mathematic calculation field

Quickly to show you a little more of the possibility, let me enable the a mathematical calculation field and go back to our

tracker.

You remember we had a birth date that the user is supposed to enter. But what if instead of displaying the date we need to display the age of the user. In that case a user can be someone registering to a service, I don't medical, insurance, medication that require someone using Tiki to have this information right away.

So let calculate the age of the contact entered in this tracker item. We will use the birthdate he entered.

First, we take the actual date and subtract the user birth date to get the difference.

Now computers and programs are based on a calendar where everything started in 1971.

So to get the right difference, we divide the result by this year timestamp.

We round the result to 0 decimal as we don't want fractions of numbers in the age.

And finally we add a string to make it nicer.

Saving.

Now let's add a new item so the field is calculated.

Tada !

We could have also added some condition in case I add this field after some items have been already created. Like "age was not calculated yet, please review and save it" or in case the birthdate is not a mandatory field and can be empty something like "age can't be calculated without a birthdate". It is not super easy but it is far to be complicate and it is so powerful. You got plenty of command, the syntax is clear and most of the time what could fail is about error in the logic or your typo.

Please refer to the Tiki documentation at :

The Trackers global options

Clicking the General tab, you will see an impressive list of options and parameters. It's up to you to look at them and investigate or experiment for your need.

The tracker properties

More options and parameters per tracker are available in the trackers section.

- Features, mainly for the Comments feature, the other being kept for legacy purposes but have been better integrate in the trackers.
- Display with sort and tracker item information. It is common to use the Status so let's activate it.
- Section Format to use templates to display a tracker. I don't use that because I really prefer using the plugin List and the unified index in conjunction with trackers for maximum flexibility in design (I'll show you).
- Status, to decide the items status on creation or modification that can initiate cascading actions.
- Notification if someone need to be notified when something is changed in the tracker or to publish an rss from this tracker.
- Permissions that are a special set of permissions for the trackers in Tiki. For you to read, it is again straightforward.

I save and you can see now there is a status for each of my item.

Very useful.

□

How to display a catalog in a wiki page

Now that we know better about trackers, let's see how we use it to create an online catalog for a shop or anything else.

I go at a bootstrap website I created for this.

As you can see I have an area for featured products, product that have an old price and a new price as discount. Those items are coming right away from a tracker and are in fact tracker items. Let see the tracker first. As we learned I need to go to my trackers menu that in this website is at the bottom. Trackers, Products. And here I have a very simple tracker made with 4 fields.

Name, Picture that is a files field type and 2 currency field type.

Let's edit an item. Instead of Simple Table, let's call this item "La table" that is the french for the table but with this new name it look really much more attractive and justify the price for it of course.

Back to my Home, I can see the item was updated.

Now this is done using a few component that are coming out of the box in Tiki. I'm getting a bit outside of this tutorial scope but I really think it worth to have a look to the plugin setting and templates I used for this. So let's edit the page.

First a plugin List on the wiki page and as you can already see it doesn't require a lot of typing.

Pagination because I want only 6 items here. Some filters. One to display the items of a specific tracker.

And one to display only items where the field old price is not empty.

☐The syntax for the fields and format we want the value to be displayed.☐☐And, to integrate nicely this plugin output into my design I used a wiki page as smarty template.☐☐Let's have a quick look just for you to have an idea.☐Html syntax, classes and the item with its object reference name.☐below the code for the modal.☐

Again not a lot of work for a great result that will simplify your life and make you or the organism you are working for save a lot of money.☐

That's it for today with this XL video.☐Indeed there are more to tell about trackers, tracker field types, tracker plugin, plugin list or smarty template.

But you got the basic and I planned already more advanced tutorials for all the treasure you can find in Tiki related to Trackers

I hope you've enjoyed this Tiki Express Tutorial.
To help me continuing those I need your support !

Click on the like icon below that video and share the video everywhere you think it should be.
I don't have enough time to work, do the tutorial and care that every Tikiers have the opportunity to watch them. So, please, make it available were it is needed to.

If you don't want to miss my next tutorial and want to be notified when I'll publish one just

.

Thanks again for watching and may the power of Tiki be with you !

Rating

Video link

h80QuuYxbhk

Video length

19:30

Author

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Validated

Yes

Creation date

Wed 06 Feb, 2019

Width

560

Height

315

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Comments

Invalid trackeritem ID: 408

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