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 *items* 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.

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

Create Tracker

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General

Name

Description

☐ Description is wiki-parsed

Field Prefix

Features

Display

Section Format

Status

Notifications

Permissions

Admin Trackers ⊙ 🔧

Create/Edit Trackers

Name:	[_____]	
Description:	Description text is tiki-parsed: ☐ [_____]	
Categorize	Show Categories	
Auto create corresponding categories		☐
Show status		☐
Default status displayed in list mode		☑ open ☐ pending ☐ closed
Show status to tracker admin only		☐
Send copies of all activity in this tracker to this e-mail address: *You can add several email addresses by separating them with commas.*		[_____]
Use simplified e-mail format *The tracker will use the text field named Subject if any as subject and will use the user email or for anonymous the email field if any as sender*		☐
New items are created with status		open ▾
Authoritative status for modified items		No change ▾
Item creator can modify his items? *The tracker needs a user field with the option 1*		☐
Only one item per user or IP *The tracker needs a user or IP field with the option 1*		☐
Member of the default group of creator can modify items? *The tracker needs a group field with the option 1*		☐
Show creation date when listing tracker items?		☐
Show creation date when viewing tracker item?		☐
Show lastModif date when listing tracker items?		☐
Show lastModif date when viewing tracker item?		☐
What field is used for default sort?		LastModif ▾
What is default sort order in list?		ascending ▾
Tracker items allow ratings?		☐
Tracker items allow comments?		☐
Tracker items allow attachments?		☐
Items can be created only during a certain time		After: ☐ August ▾ 26 ▾ 2008 ▾ 10 ▾ 34 ▾ Before: ☐ August ▾ 26 ▾ 2008 ▾ 10 ▾ 34 ▾
Do not show empty fields in item view?		☐
Show these fields (ID comma separated) in a popup on item link when listing tracker items?		[_____]
	Save	

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:

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Page: Create/edit trackers **Local URL**: tiki-admin_trackers.php

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: *address1@tikiwiki.org,address2@tikiwiki.org,address3@tikiwiki.org*	
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	
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		

Option	Choices	Explanation	Version
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 alow 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 IP	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: *1,2,5,6,9* 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.	Tiki>=2.0
Wiki page to display an item	wiki␣ageName 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

The jQuery Sortable Tables feature must be activated for the sort feature to work.