

Email folders Tracker Field

Emails stored as part of the Tiki database, like any other content (files, wiki pages, events, blog posts, etc.)

Email Folder is a new addition to the Tracker Field Types, introduced in Tiki23, being able to hold a list of emails in flat format or IMAP folder-like structured support for Inbox/Sent/Trash folders.

Emails are currently moved to tracker items via the Webmail interface in Tiki (Cypht web interface). Cypht is used to display Tiki-stored messages and handle all relevant actions - read, reply, forward, copy, move, delete. Message can be moved to another tracker item or to an IMAP folder.

Recording of demo at October 2021 round table

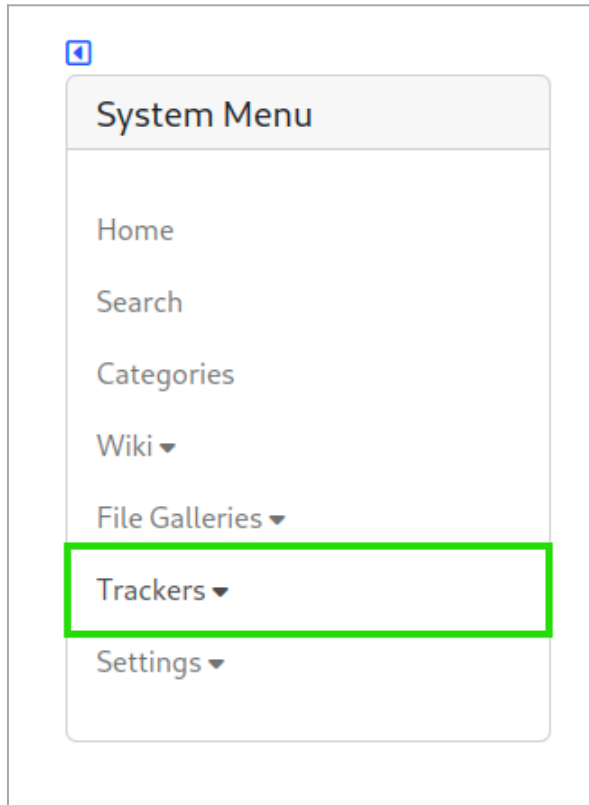
1. Configuration

To configure the email folders tracker field, do the following:
First of all you have to create a tracker. To create a tracker, proceed as follows:

1.1. Creation and configuration of the Tracker

1.1.1. Check the activation of the Trackers feature

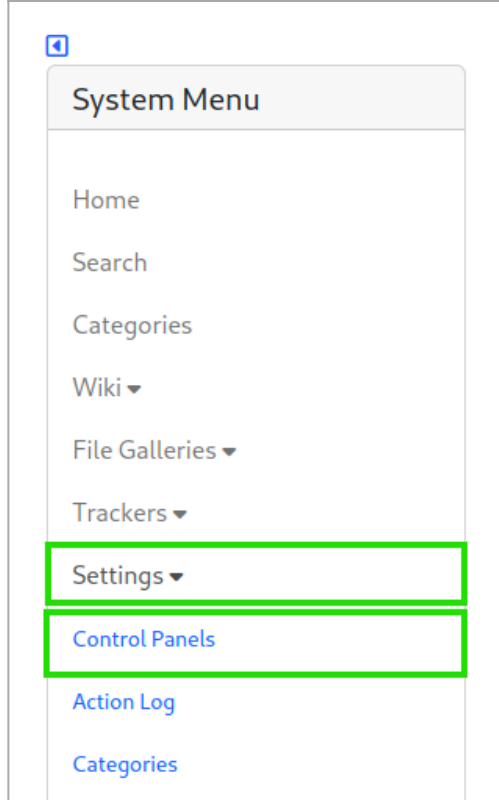
If the Tracker tab exists in the system menu go to the next point.



Click to expand

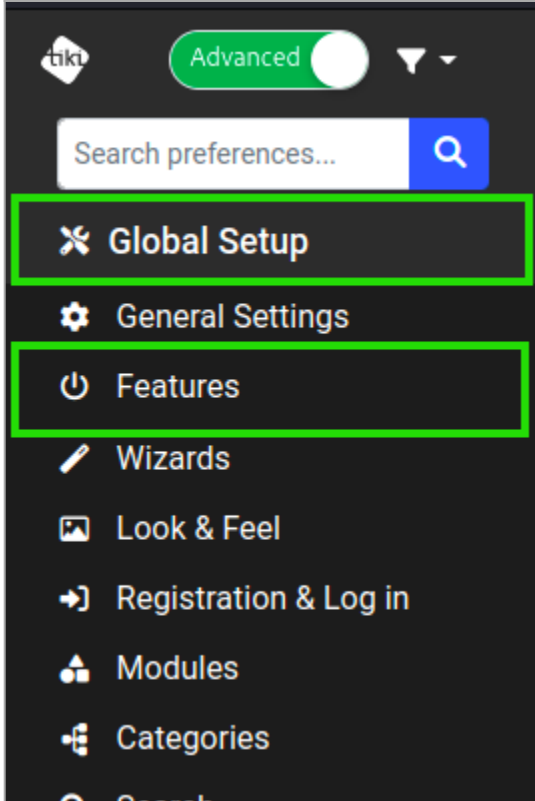
Otherwise if the Tracker tab does not exist, so the feature is not yet activated, you can activate it by following the following steps :

- Settings -> Control Panels



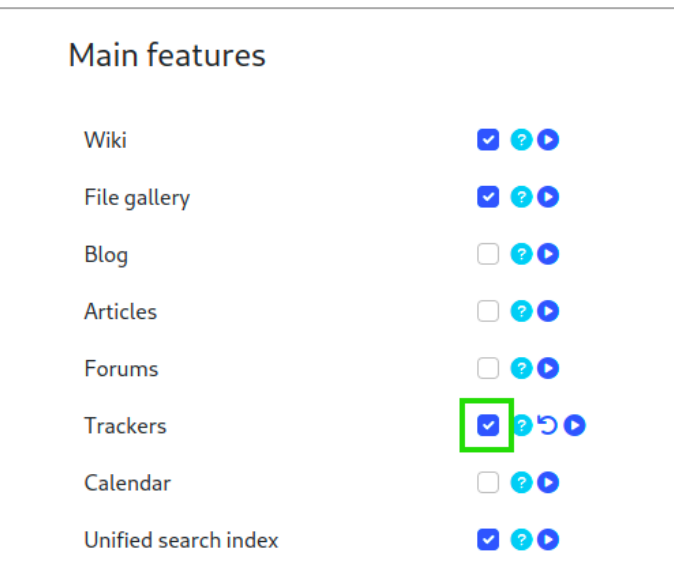
Click to expand

- Global Setup -> Features



Click to expand

- In the Main features section, check the Trackers box

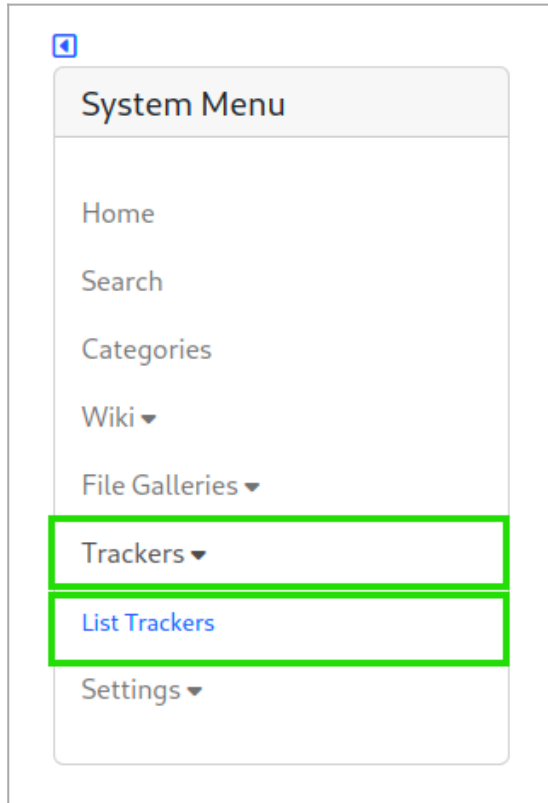


Click to expand

1.1.2. Create a Tracker


To create a Tracker click on:

- Trackers -> List Trackers



Click to expand

- Create

Trackers ? 

+ Create Duplicate Import ▾

Find...

Find

Click to expand

- Enter the name of the Tracker

Create Tracker ×

General

Name

Email Tracker

Description

☐ Description is wiki-parsed

Field Prefix

nametracker

Click to expand

- Add a description if possible

Create Tracker

×

General

Name

Email Tracker

Description

Tracker for the movement of mails

☐ Description is wiki-parsed

Field Prefix

emailtracker

Click to expand

- Finally save

Copy

Section Format

Status

Notifications

Permissions

Categories

Close

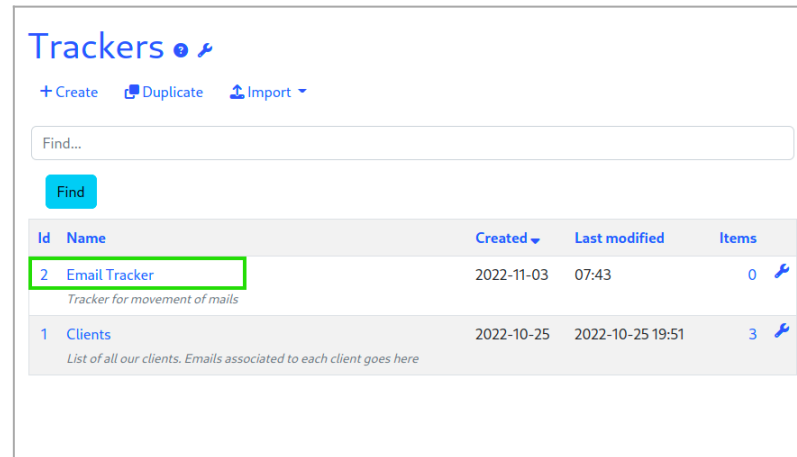
Save

Click to expand

1.1.3. Add fields

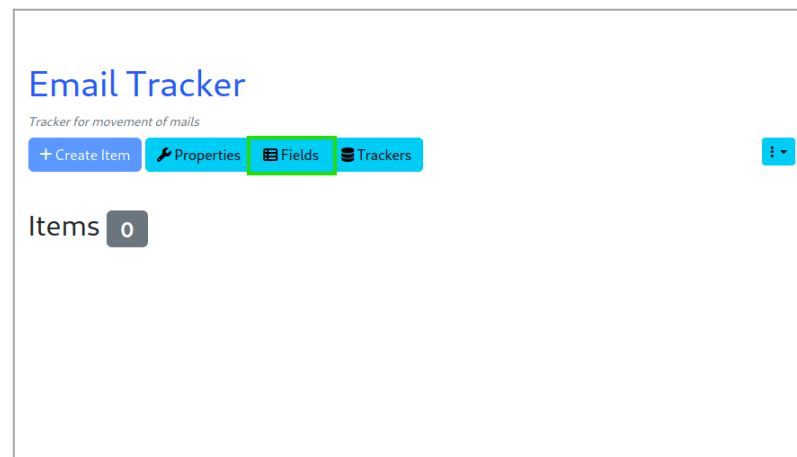
Once the tracker is created. Click on :

- the Tracker you just created



Click to expand

- then on the **Fields** button



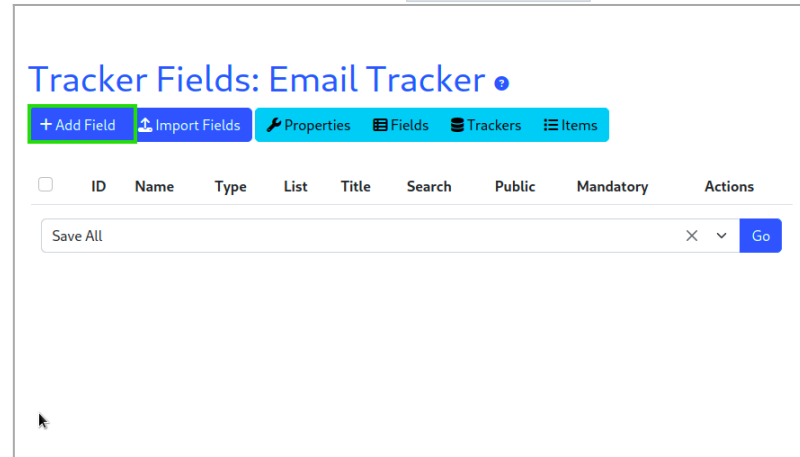
Click to expand

The minimal configuration needs two fields:

- the Text type field, which will serve as the description
- the Folder type field, which will be used to store emails

1.1.3.1. The Text field

Click on Add Field



Click to expand

- Enter the field name

Add Field

Name

Name

Type

Text Field

More types available

More field types may be enabled from the **administration panel**.

Description

☐ Description contains wiki syntax

☐ Restrict visibility to administrators

Useful if you are working on a live tracker.

Close

Add Field & Edit Advanced Options

Add Field

Click to expand

- Choose the type of field, by default it is already Text Field

Add Field

Name

Name

Type

Text Field

More types available

More field types may be enabled from the **administration panel**.

Description

☐ Description contains wiki syntax

☐ Restrict visibility to administrators

Useful if you are working on a live tracker.

Close

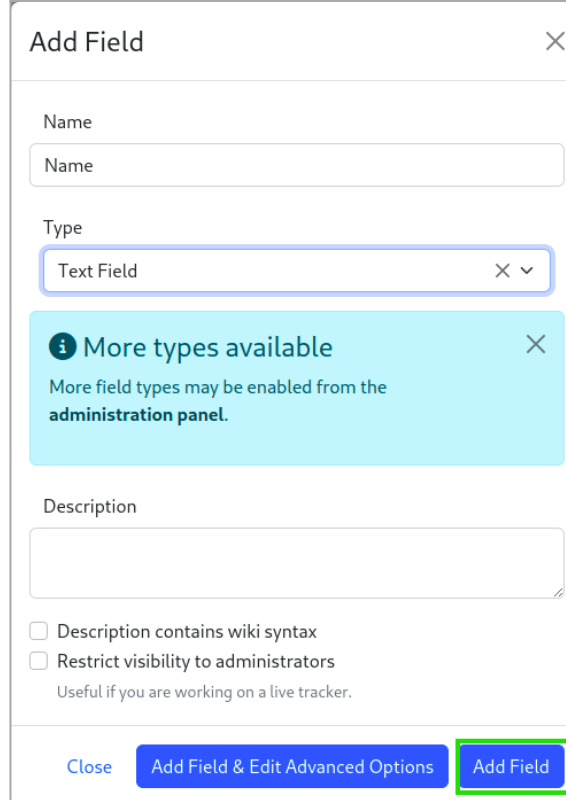
Add Field & Edit Advanced Options

Add Field

Click to expand

- Then validate by clicking on the **Add Field** button

Click to expand



Add Field

Name

Name

Type

Text Field

i More types available

More field types may be enabled from the **administration panel**.

Description

☐ Description contains wiki syntax

☐ Restrict visibility to administrators

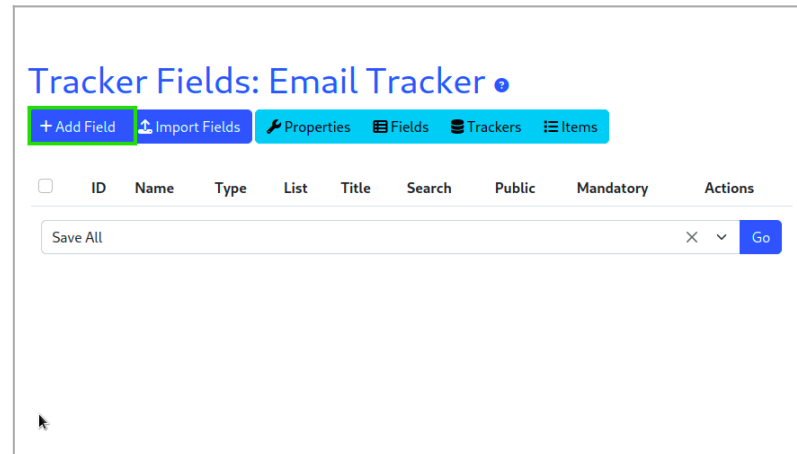
Useful if you are working on a live tracker.

Close Add Field & Edit Advanced Options Add Field

1.1.3.2. The Folder field

For the folder type field, click on:

- Add a field



Tracker Fields: Email Tracker

+ Add Field Import Fields Properties Fields Trackers Items

ID	Name	Type	List	Title	Search	Public	Mandatory	Actions
Save All								

Click to expand

- Enter the field name

Add Field

Name

Emails

Type

Email Folder

i More types available
More field types may be enabled from the **administration panel**.

Description

☐ Description contains wiki syntax
☐ Restrict visibility to administrators
Useful if you are working on a live tracker.

Close Add Field & Edit Advanced Options Add Field

Click to expand

- Choose the field type, you must choose Email Folder

Add Field

Name

Emails

Type

Email Folder

More types available

More field types may be enabled from the **administration panel**.

Description

☐ Description contains wiki syntax

☐ Restrict visibility to administrators

Useful if you are working on a live tracker.

Close

Add Field & Edit Advanced Options

Add Field

Click to expand

- Click the Add Field & Edit Advanced Options button

Add Field

Name

Emails

Type

Email Folder

More types available

More field types may be enabled from the **administration panel**.

Description

☐ Description contains wiki syntax

☐ Restrict visibility to administrators

Useful if you are working on a live tracker.

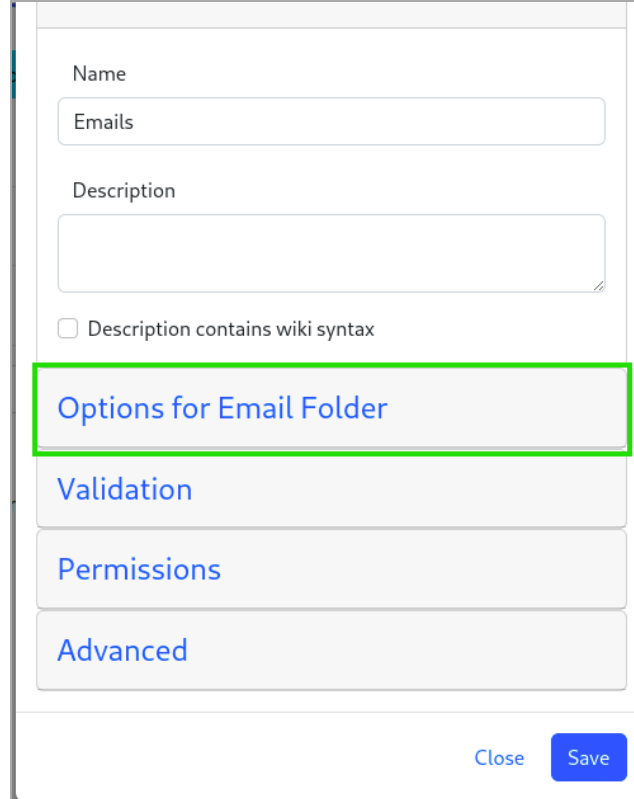
Close

Add Field & Edit Advanced Options

Add Field

Click to expand

- Click the Options for Email Folder button



A screenshot of a web form. The form has a light gray background and a white border. It contains the following elements from top to bottom: a 'Name' label above an empty text input field; an 'Emails' label above an empty text input field; a 'Description' label above a larger empty text area; a checkbox labeled 'Description contains wiki syntax' which is currently unchecked; a section titled 'Options for Email Folder' which is highlighted with a green border; a section titled 'Validation'; a section titled 'Permissions'; and a section titled 'Advanced'. At the bottom right of the form are two buttons: 'Close' (light blue) and 'Save' (blue).

Click to expand

- In the Gallery ID field, select the File Gallery.

It is better to have a dedicated File Gallery for Email. For this example I have a Folder called "Emails", so let's select the option File Galleries > Emails

Options for Email Folder

Associate email messages with tracker items.

Gallery ID

File Galleries > Emails

File gallery to upload new emails into.

Use Folders

No

Use separate folders like Inbox, Sent, Trash, Archive.

Compose Page

Name of the wiki page where compose button will direct to. Leave empty for default Webmail page.

Exclude data and changes from email notifications

No

Data and changes to this field are not included in email notifications.

Click to expand

- In the field Use Folders select Yes, other fields are added below for the configuration of the names of the folders. You can leave it like this

Options for Email Folder

Associate email messages with tracker items.

Gallery ID

File Galleries > Emails X v

File gallery to upload new emails into.

Use Folders

No X v

Use separate folders like Inbox, Sent, Trash, Archive.

Compose Page

Name of the wiki page where compose button will direct to. Leave empty for default Webmail page.

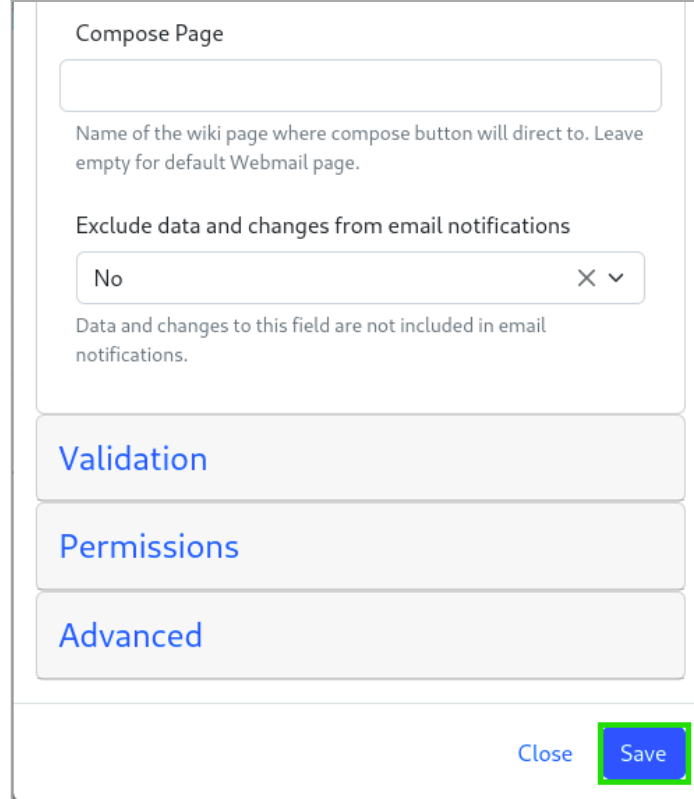
Exclude data and changes from email notifications

No X v

Data and changes to this field are not included in email notifications.

Click to expand

- And finally Validate by pressing Save



The screenshot shows a configuration form titled 'Compose Page'. It contains a text input field, a descriptive text, a dropdown menu set to 'No', and another descriptive text. Below these are three expandable sections: 'Validation', 'Permissions', and 'Advanced'. At the bottom right are 'Close' and 'Save' buttons, with the 'Save' button highlighted by a green border.

Compose Page

Name of the wiki page where compose button will direct to. Leave empty for default Webmail page.

Exclude data and changes from email notifications

No X v

Data and changes to this field are not included in email notifications.

Validation

Permissions

Advanced

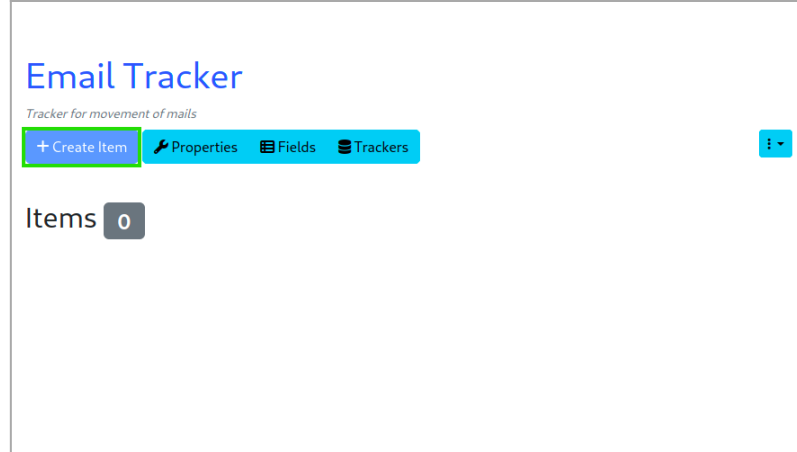
Close Save

Click to expand

1.1.4. Item creation

Once the configuration is complete, you must create an item. For this on the item page :

- click on the Create Item button



Click to expand

- A modal window is launched, enter the Name in the Name field and validate

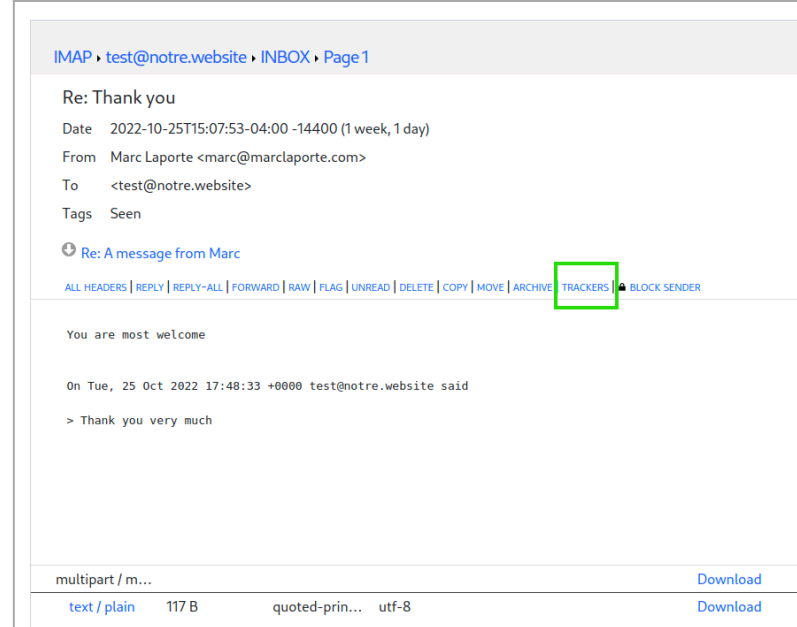
The screenshot shows a 'Create Item' modal window. The title bar says 'Create Item' with a close button (X) on the right. Below the title bar, there is a 'Name' field with a red asterisk indicating it is required. The text 'Emails move' is entered into this field, which is highlighted with a green border. Below the 'Name' field, the text 'Emails' is displayed, followed by a description: 'Emails can be copied or moved here via the Webmail interface.' At the bottom of the modal, there are three buttons: 'Close' (blue text), 'Preview' (grey button), and 'Create' (blue button).

Click to expand

2. Move emails to trackers

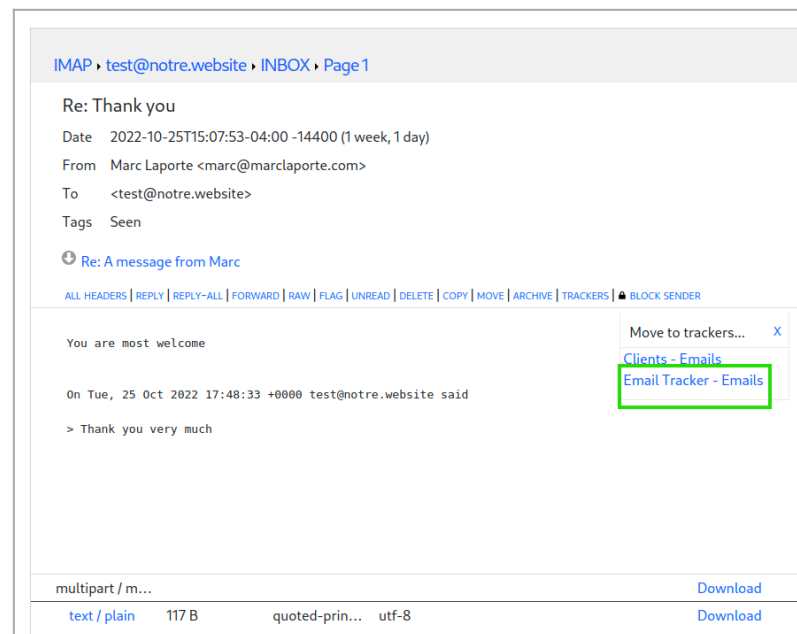
To move an email, open the email you want to move :

- Click on the Tracker button



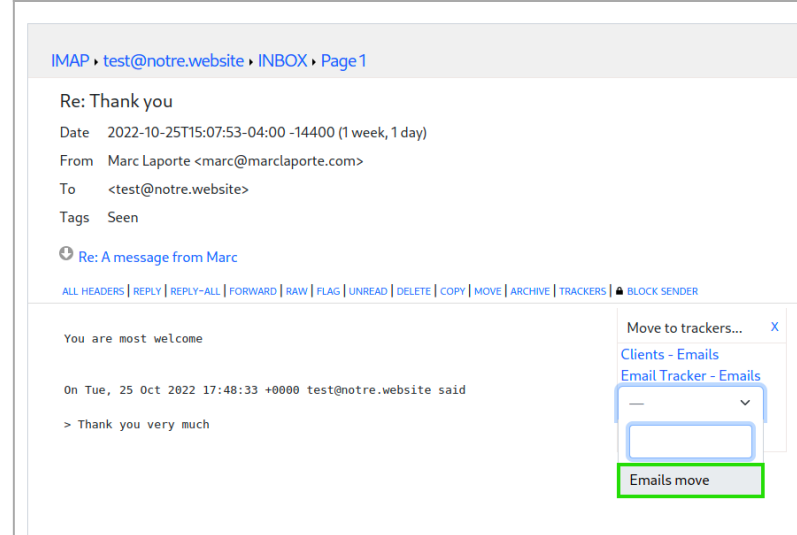
Click to expand

- In the small window select the Tracker you created



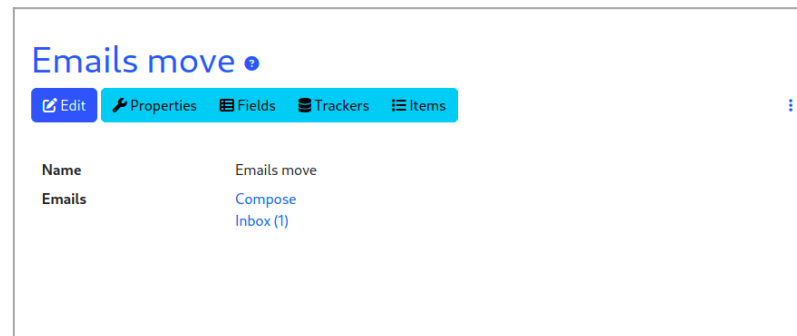
Click to expand

- Finally select the folder.



Click to expand

- Once done, here is the end result



Click to expand

Related:

- Selector Tracker Fields
- Adding fields to a tracker
- https://gitlab.com/tikiwiki/tiki/-/merge_requests/818
- Email as a first-class citizen

Alias

- Email folder Tracker Field