## 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 fla 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.

System Menu	
Home	
Search	
Categories	
Wiki 🗸	
File Galleries 🔻	
Trackers 🕶	
Settings 🗸	

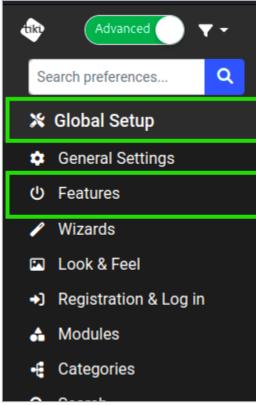
Click to expand

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

٩				
System Menu				
Home				
Search				
Categories				
Wiki 🗸				
File Galleries 🕶				
Trackers 🕶				
Settings 🕶				
Control Panels				
Action Log				
Categories				

Global Setup -> Features



#### In the Main features section, check the Trackers box

Main features	
Wiki	00 0
File gallery	00
Blog	
Articles	
Forums	
Trackers	000 D
Calendar	
Unified search index	

Click to expand

## 1.1.2. Create a Tracker

To create a Tracker click on:

### Trackers -> List Trackers

1				
System Menu				
Home				
Search				
Categories				
Wiki 🗸				
File Galleries 🔻				
Trackers 🔻				
List Trackers	1			
Settings 🕶				

Click to expand

• Create

_	-				
	rac		20	_	-
		КС		2	~
	I G C			-	•

+ Create	💕 Duplicate	🗘 Import 👻	
Find			
Find		k	

## • Enter the name of the Tracker

Create Tracker ×	
General	
Name	
Email Tracker	
Description	
<ul> <li>Description is wiki-parsed</li> <li>Field Prefix</li> </ul>	
nametracker	

Click to expand

 $\boldsymbol{\cdot}$  Add a description if possible

Create Tracker	×
General	
Name Email Tracker Description	
Tracker for the movement of mails	4
<ul> <li>Description is wiki-parsed</li> <li>Field Prefix</li> </ul>	
emailtracker	

• Finally save

Section Format	
Status	
Notifications	
Permissions	
Categories	
	Close Save

# 1.1.3. Add fields

Once the tracker is created. Click on :

• the Tracker you just created

Fir	nd				
	Find				
ld	Name	Created 🗸	Last modified	ltems	
2	Email Tracker Tracker for movement of mails	2022-11-03	07:43	0	1
1	Clients List of all our clients. Emails associated to each client goes here	2022-10-25	2022-10-25 19:51	3	1

Click to expand

• then on the Fields button



Click to expand

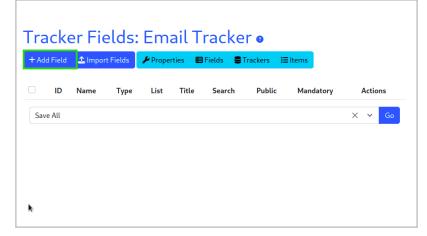
The minimal configuration needs two fields:

 $\cdot$  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
Туре
Text Field × ~
<ul> <li>More types available ×</li> <li>More field types may be enabled from the administration panel.</li> </ul>
Description
Description contains wiki syntax
<ul> <li>Restrict visibility to administrators</li> <li>Useful if you are working on a live tracker.</li> </ul>
Close Add Field & Edit Advanced Options Add Field

 $\boldsymbol{\cdot}$  Choose the type of field, by default it is already Text Field

Add Field ×
Name
Name
Туре
Text Field X Y
More types available × More field types may be enabled from the administration panel.
Description
<ul> <li>Description contains wiki syntax</li> <li>Restrict visibility to administrators</li> <li>Useful if you are working on a live tracker.</li> </ul>
Close Add Field & Edit Advanced Options Add Field

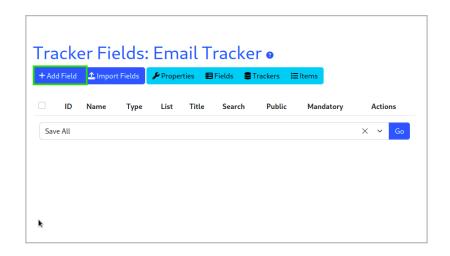
Then validate by clicking on the Add Field button

Add Field ×
Name
Name
Туре
Text Field × ~
More types available  More field types may be enabled from the administration panel.
Description
<ul> <li>Description contains wiki syntax</li> <li>Restrict visibility to administrators</li> <li>Useful if you are working on a live tracker.</li> </ul>
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



## Click to expand • Enter the field name

Add Field $ imes$
Name
Emails
Туре
Email Folder X V
More types available × More field types may be enabled from the administration panel.
Description
<ul> <li>Description contains wiki syntax</li> <li>Restrict visibility to administrators</li> <li>Useful if you are working on a live tracker.</li> </ul>
Close Add Field & Edit Advanced Options Add Field

Click to expand

 $\cdot$  Choose the field type, you must choose Email Folder

Add Field ×
Name
Emails
Туре
Email Folder X Y
More types available  More field types may be enabled from the administration panel.
Description
<ul> <li>Description contains wiki syntax</li> <li>Restrict visibility to administrators</li> <li>Useful if you are working on a live tracker.</li> </ul>
Close Add Field & Edit Advanced Options Add Field

Click the Add Field & Edit Advanced Options button

Add Field ×
Name
Emails
Туре
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 the Options for Email Folder button

Name	
Emails	
Description	
<ul> <li>Description contains wiki syntax</li> </ul>	
Options for Email Folder	
Validation	
Permissions	
Advanced	
	Close Save

• 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 X 🗸 🗸
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.

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

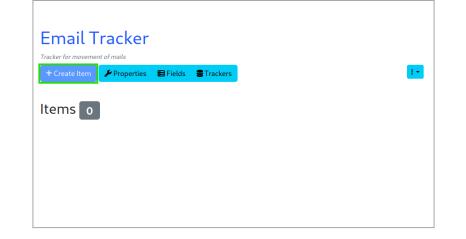
Options for Email Folder	
Associate email messages with tracker items.	
Gallery ID	
File Galleries > Emails     ×	~
File gallery to upload new emails into.	
Use Folders	
No ×	~
Use separate folders like Inbox, Sent, Trash, Archive.	
Compose Page	
Name of the wiki page where compose button will direct to. L empty for default Webmail page.	.eave
Exclude data and changes from email notifications	
No ×	~
Data and changes to this field are not included in email notifications.	

And finally Validate by pressing Save

empty for default V	age where compose button will direct to. Leave Vebmail page.
Exclude data and	changes from email notifications
No	X ~
Data and changes t notifications.	to this field are not included in email
alidation/	
/alidation Permissions	

# 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



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

Create Item >	<
Name * Emails move Emails Emails can be copied or moved here via the Webmail interface.	]
Close Preview Create	

Click to expand

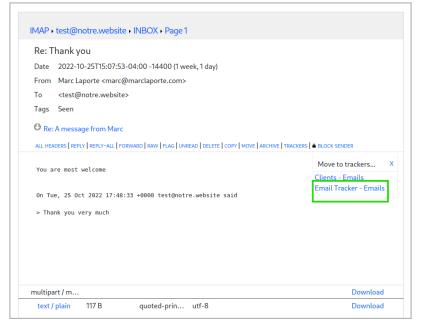
## 2. Move emails to trackers

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

 $\boldsymbol{\cdot}$  Click on the Tracker button

Re: Thank you		
Date 2022-10-25T15:07	53-04:00 -14400 (1 week, 1 day)	
From Marc Laporte <ma< th=""><th>rc@marclaporte.com&gt;</th><th></th></ma<>	rc@marclaporte.com>	
To <test@notre.webs< th=""><th>ite&gt;</th><th></th></test@notre.webs<>	ite>	
Tags Seen		
• Re: A message from Ma	rc	
ALL HEADERS REPLY REPLY-ALL	FORWARD   RAW   FLAG   UNREAD   DELETE   COPY   MOVE   ARCHI	
You are most welcome		
On Tue, 25 Oct 2022 17:	48:33 +0000 test@notre.website said	
> Thank you very much		

In the small window select the Tracker you created



Click to expand

• Finally select the folder.

Re: Thank you	
Date 2022-10-25T15:07:53-04:00 -14400 (1 week, 1 day)	
From Marc Laporte <marc@marclaporte.com></marc@marclaporte.com>	
To <test@notre.website></test@notre.website>	
Tags Seen	
Re: A message from Marc	
Re: A message from Marc     ALL HEADERS   REPLY   REPLY-ALL   FORWARD   RAW   FLAG   UNREAD   DELETE   COPY   MOVE	ARCHIVE   TRACKERS    A BLOCK SENDER Move to trackers
• Re: A message from Marc	
Re: A message from Marc     ALL HEADERS   REPLY   REPLY-ALL   FORWARD   RAW   FLAG   UNREAD   DELETE   COPY   MOVE   You are most welcome	Move to trackers
Re: A message from Marc     ALL HEADERS   REPLY   REPLY-ALL   FORWARD   RAW   FLAG   UNREAD   DELETE   COPY   MOVE	Move to trackers

### • Once done, here is the end result



Click to expand

Related:

- Selector Tracker Fields
- $\boldsymbol{\cdot}$  Adding fields to a tracker
- https://gitlab.com/tikiwiki/tiki/-/merge\_requests/818
- Email as a first-class citizen

• Email folder Tracker Field