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.

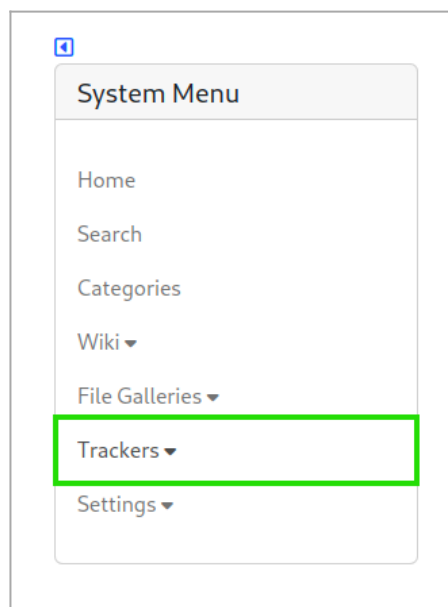Recording of demo at October 2021 round table

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

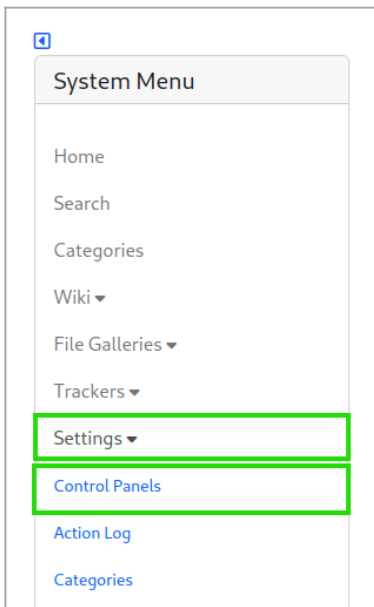# 1.1.1. Check the activation of the Trackers feature

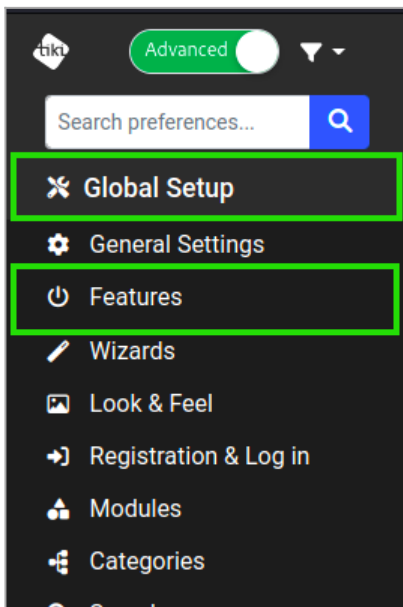If the Tracker tab exists in the system menu go to the next point.

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 :
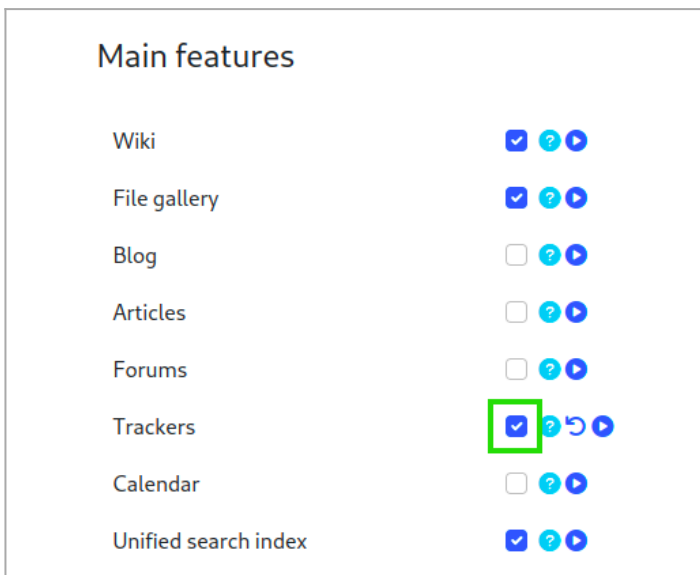
- Settings -> Control Panels

Click to expand

- Global Setup -> Features

Click to expand

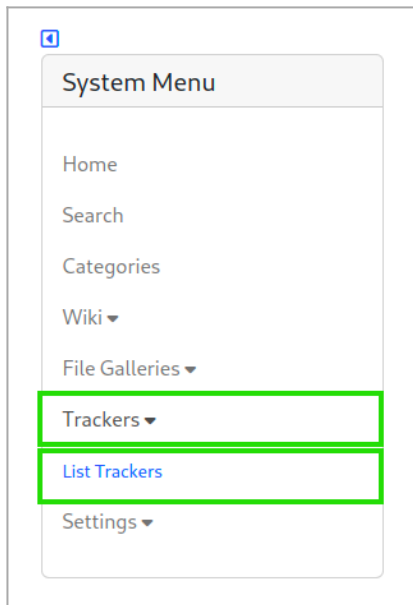- In the Main features section, check the Trackers box
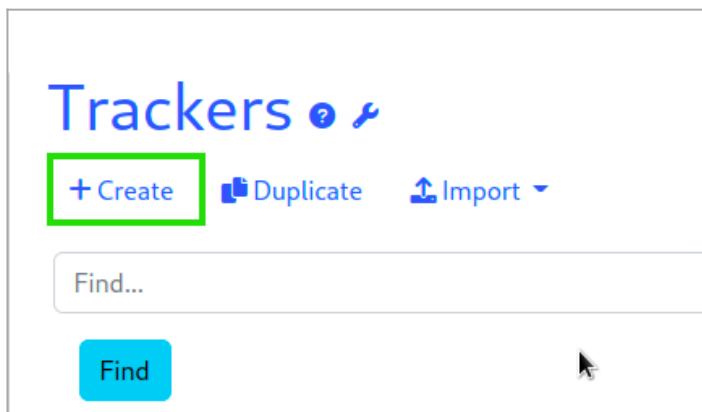

Click to expand

1.1.2. Create a Tracker

To create a Tracker click on:

- Trackers -> List Trackers

Click to expand

- Create

Click to expand

- Enter the name of the Tracker
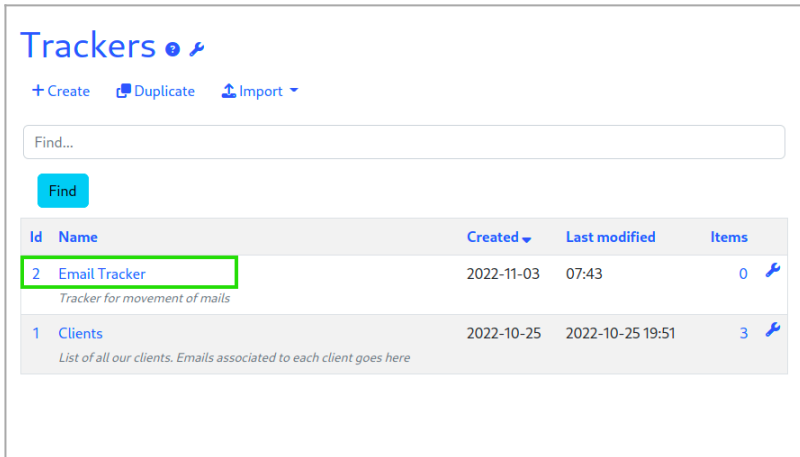
Click to expand

- Add a description if possible

Click to expand

- Finally save

Click to expand

1.1.3. Add fields

Once the tracker is created. Click on :

- the Tracker you just created

Click to expand

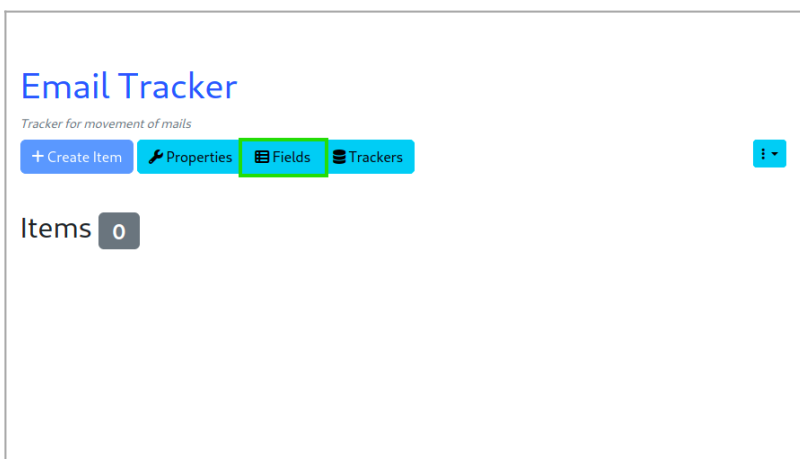- then on the Field button

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

Do it by clicking 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   ×   ∨   Go

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

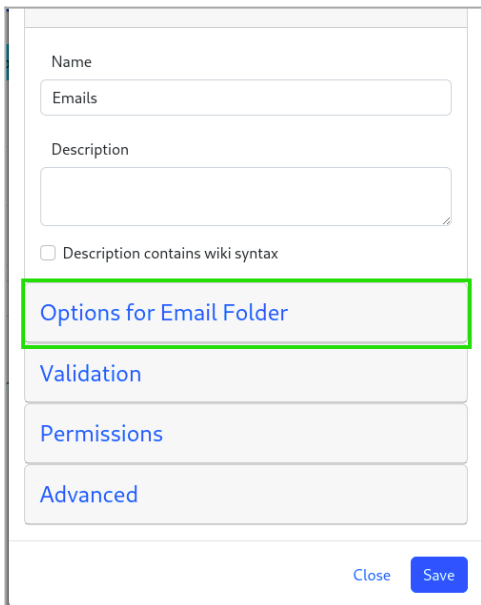| |

☐ 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 a field button

Click to expand

1.1.3.2. The Folder field

For the folder type field, click on:

- Add a field

Click to expand

- Enter the field name

Click to expand

- Choose the field type, you must choose Email Folder

Click to expand

- Click the Add Field & Edit Advanced Options button

Click to expand

- Click the Options for Email Folder button

Name

Emails

Description

☐ Description contains wiki syntax
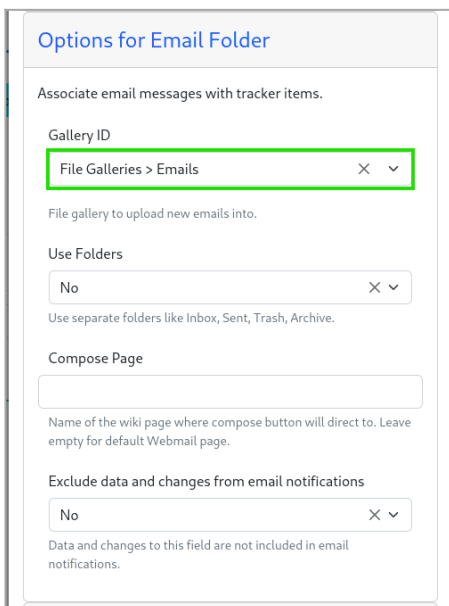
Options for Email Folder

Validation

Permissions

Advanced

Close Save

Click to expand

- In the Gallery ID field, 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 contiguration of the names of the folders. You can leave it like this

Click to expand

- And finally Validate by pressing 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

Click to expand

2. Move emails to trackers

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

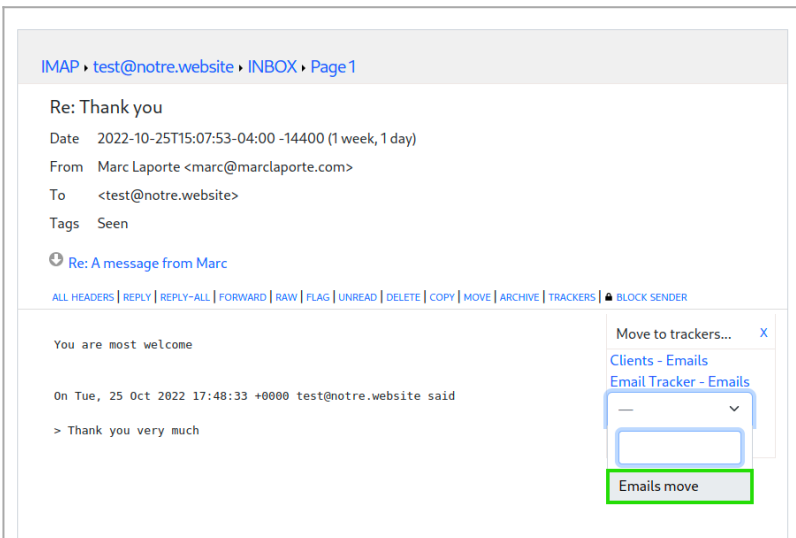- Click on the Tracker button

Click to expand

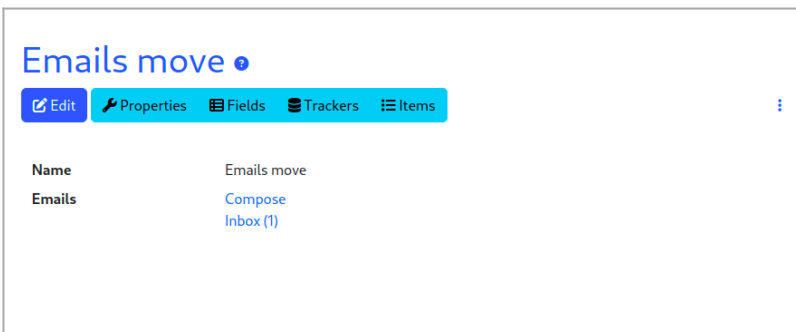- In the small window select the Tracker you created
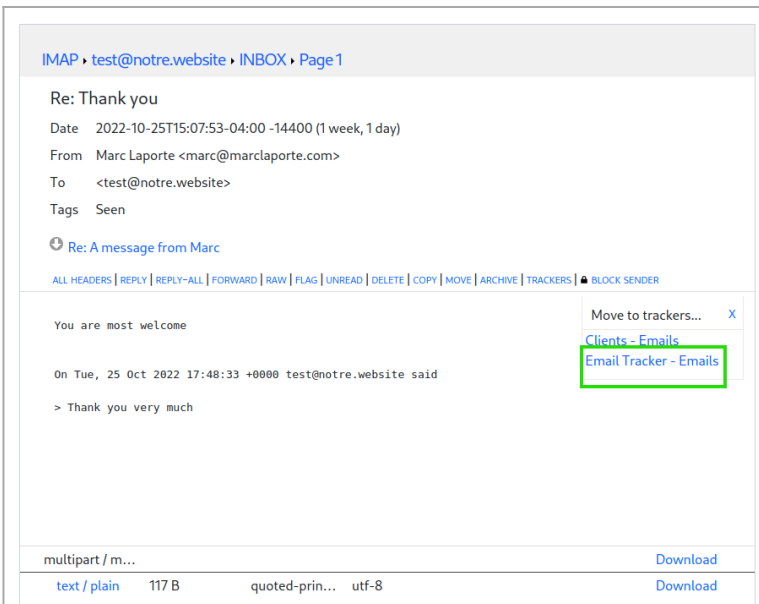
Click to expand

- 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