[Tracker](http://community.egroupware.org/index.php?wikipage=ManualTrackerIndex)

A tracking system permits a company to track processes in a standardized form. As examples from the world of software development there are three Tracker queues which are included in new installations: **bugs** –error messages, feature requests–, **suggest modifications** and **patches**. The focus here is on queues, which depict processes and how to treat them individually.   
  
Each Tracker queue contains different tickets (entries) which can be allocated to various categories and responsible persons. In the [application configuration](http://community.egroupware.org/index.php?wikipage=ManualTrackerAdmin) you can define individual Tracker queues, [access rights](http://community.egroupware.org/index.php?wikipage=ManualTrackerACL) ("who may read or change what/when") as well as co-workers and, in particular, the person responsible for these entries.   
  
The Tracker interface displays all Tracker queues along with the individual categories and all entries along with a summary, priority, status and responsible person. You can [add new tickets](http://community.egroupware.org/index.php?wikipage=ManualTrackerEdit) by clicking on the **[Add]** button. Click on the **summary** to [edit existing entries](http://community.egroupware.org/index.php?wikipage=ManualTrackerEdit). If you have the required [access rights](http://community.egroupware.org/index.php?wikipage=ManualTrackerACL), you can, for instance as the person responsible, add a comment or change an entry’s status. All changes made in the tracking system are **listed in a history** (saved) and can therefore be retraced. You can also be notified of changes to Tracker entries. Whatever you want to be informed about can be determined in [Tracker settings](http://community.egroupware.org/index.php?wikipage=ManualTrackerPreferences).   
  
More pages of Tracker: 

* [Tracker interface](http://community.egroupware.org/index.php?wikipage=ManualTrackerIndex)
* [Editing a Tracker entry](http://community.egroupware.org/index.php?wikipage=ManualTrackerEdit)
* [Tracker preferences](http://community.egroupware.org/index.php?wikipage=ManualTrackerPreferences)
* [Tracker configuration](http://community.egroupware.org/index.php?wikipage=ManualTrackerAdmin) only with Admin rights of the Tracker
* [Tracker access rights](http://community.egroupware.org/index.php?wikipage=ManualTrackerACL)
* [Import TTS Tickets](http://community.egroupware.org/index.php?wikipage=ManualTrackerImport_tts) - Import Tickets from the old Trouble Ticket System (TTS).

[Tracker interface](http://community.egroupware.org/index.php?wikipage=ManualTrackerIndex)

The **tracking system interface**, also known as **Tracker**, displays all Tracker queues including individual categories and all entries with summary, priority, status and responsible person. You can [add new tickets](http://community.egroupware.org/index.php?wikipage=ManualTrackerEdit) by clicking on the **[Add]** button. Click on **Summary** to [edit existing entries](http://community.egroupware.org/index.php?wikipage=ManualTrackerEdit). If you have the required [access rights](http://community.egroupware.org/index.php?wikipage=ManualTrackerACL), you can for instance, as the person responsible, add a comment or change an entry’s status. All changes made in the tracking system are **listed in a history** (saved) and can therefore be retraced.   
  
  
The interface is set up as follows:   
  
On the top left in the selection box **Tracker queue** you can select the queue which concerns or interests you. On the right side you will see the **[Add]** button to [add new tickets](http://community.egroupware.org/index.php?wikipage=ManualTrackerEdit).   
  
Below that is the **navigation bar** including various selection boxes as **filters** and a text field to **search**. All search and filter criteria respectively can be combined. Use the arrows to scroll through the list or the double arrows to go to the top or the bottom of the list. You can also use the symbol to hide/unhide any columns. This can also be preset by your system administrator.   
  
These are the available filter and selection criteria: 

* [**Category**](http://community.egroupware.org/index.php?wikipage=ManualTrackerCategorie): you can create a Tracker category in the [Tracker configuration](http://community.egroupware.org/index.php?wikipage=ManualTrackerAdmin) and automatically assign a **responsible person** for a Tracker entry. It is possible to filter according to these categories thereby limiting the entries displayed.
* **Version**: It is possible to configure different Tracker versions thereby drawing on different development stages as criteria for the tracking system.
* **Status**: In addition to the predefined status you can configure your own Tracker-queue- specific status.
* **Assigned to**: Here you can choose from 'all', 'user groups' or individual 'users'. Accordingly, only this respective person’s tickets will be listed. The assignment of a responsible person can take place either by way of a [category](http://community.egroupware.org/index.php?wikipage=ManualTrackerCategorie) or the Tracker entry.
* **Created by**: Shows all users who have access rights in the selection box.

The Tracker entry (ticket) list also indicates the following columns which you can use to sort the list by clicking on the column header (text marked in blue): 

* **ID**: Ongoing (destinctive) ticket number, which for example can be given to clients to identify the ticket. The number is automatically generated by the system and cannot be changed.
* **Summary**: Displays the title or a short summary of the entry. Click on the text to open and [edit the entry](http://community.egroupware.org/index.php?wikipage=ManualTrackerEdit).
* **Date opened**: Displays the date the entry was created. This is also automatically set by the system and cannot be changed.
* **Priority**: You can set or change the priority when you [edit the entry](http://community.egroupware.org/index.php?wikipage=ManualTrackerEdit).
* **Votes**: The tracking system administrator can determine in the [configuration](http://community.egroupware.org/index.php?wikipage=ManualTrackerAdmin) whether you can vote for a Tracker queue. For instance, this is used in the eGroupWare Project for the relevance of bug reports.
* **Bounties**: The tracking system administrator can determine in the [configuration](http://community.egroupware.org/index.php?wikipage=ManualTrackerAdmin) whether you can enter a premium for a Tracker queue. A premium first appears when the administrator confirms receipt of payment. This can be used for example for feature requests.
* : Use this to **select all entries** or individual entries by clicking on the 'blank box' []. As Tracker administrator you can use the selection boxes located below the list (and only visible to administrators) to change multiple entries simultaneously. To do this, determine for the individual selection boxes whether, or which respectively, changes should be made and then click on the **[Update]** button. The changes will then be made for all the Tracker entries selected.

[Editing a Tracker entry](http://community.egroupware.org/index.php?wikipage=ManualTrackerEdit)

You can add a **new Tracker entry** by clicking on the **[Add]** button in the [Tracker interface](http://community.egroupware.org/index.php?wikipage=ManualTrackerIndex) located at the top right. A window to **edit Tracker** will open. However, the **status** and **undo** fields remain hidden until the first time you **[Save]**.   
The fields you are permitted to change depend on your [access rights](http://community.egroupware.org/index.php?wikipage=ManualTrackerACL), which are determined by the administrator in the [Tracker configuration](http://community.egroupware.org/index.php?wikipage=ManualTrackerAdmin).   
  
A Tracker entry (ticket) is set up as follows: 

1. Left selection box **Tracker Queue** with all available Tracker queues and on the right a checkbox named **Private**: Entries flagged as private are only shown to the user, the responsible person and the tracking system administrator. For private entries no automatic mails to a mailing list will be sent.
2. Left [**Category**](http://community.egroupware.org/index.php?wikipage=ManualTrackerCategorie) selection box and on the right **Version**: You can automatically assign a ticket to a specific colleague by using the category.
3. Left selection box **Assigned to** user or user group and on the right **Priority**.
4. Left selection box **Status** and on the right **Resolution** with **Percentage completed**: The fields remain hidden for new additions!!!
5. **Cc**: Enter the email address that should receive changes (in addition to yourself).
6. **Summary** of the Tracker entry.
7. Below this are six tabs which lead to a variety of information:
   * **Description**: Use to input a detailed description of the ticket (cause...). All further inputs should always be added in the Comment tab so that they remain traceable "who added what when"...
   * **Comments**: Shows the number of comments and all comments added including content, date and author.
   * **Add comment**: Here you can either select a given Standard reply or enter any text comment.
   * **Attachments Links**: Here you can create [links to other applications](http://community.egroupware.org/index.php?wikipage=ManualInfologLink) or [attach files](http://community.egroupware.org/index.php?wikipage=ManualInfologFile). Choose the application and a search term or a file from your Explorer and then click on the [Attach] button. Existing links are listed underneath. Click on the title marked in blue to open the entry in the requested application.
   * **History**: Records all modifications to the ticket (except for comments displayed in own tab). The list (sorted according to the date of change) ensures that modifications can be retraced at any time. This for example is essential for certifications.
   * **Bounties**: In the first line you can set new bounties by entering a quantity and clicking on the [Set bounty] button. You will receive a follow-up query: "Confirm that you will pay the specified bounty to implement or fix the issue?" and a note in red saying ‘Thank you for setting this bounty. The bounty will NOT be shown, until the money is received'. In the list underneath all bounties will be displayed which were set for this entry. The receipt if payment for each bounty must be confirmed by a responsible person (click  symbol) so that it can be incorporated throughout the entire list (unconfirmed premiums are only displayed within the edit mode!!!). If a payment is not made the premium can be deleted by clicking on the  symbol.

Comment: The administrator can configure whether it is even possible to set a bounty.

1. Below the various tabs you will find the information **created by ... on ...** and **last changed by ... on ...**

On the lower left you will find the **[Save]** or **[Cancel]** buttons. On the right is the **[Vote for it!]** button. As soon as you activate this button you will receive a message in red stating You voted ... . You may only vote once per entry! Once you have voted you will always see this message instead of the button.   
  
Comment: The administrator can determine in the [configuration](http://community.egroupware.org/index.php?wikipage=ManualTrackerAdmin) whether it is even possible to vote. The number of votes will be displayed on the [interface](http://community.egroupware.org/index.php?wikipage=ManualTrackerIndex).

[Tracker preferences](http://community.egroupware.org/index.php?wikipage=ManualTrackerPreferences)

This is where you can modify the [settings](http://community.egroupware.org/index.php?wikipage=ManualPreferences) for the [tracking system](http://community.egroupware.org/index.php?wikipage=ManualTracker) application. If certain points are not accessible to you or do not appear at all, this may be due to your [access rights](http://community.egroupware.org/index.php?wikipage=ManualTrackerACL). In this case consult your system administrator.   
  
The system administrator can determine which of the settings shall be made available to users. There are so-called: 

* **Forced preferences**: Settings preset by the system administrator which cannot be changed by the user.
* **Default preferences**: Default settings are recommended (given) in various fields.
* **Your preferences**: These settings may be modified. If you do not make a selection or entry, the default settings determined by your system administrator will apply. Since you cannot change the forced preferences, these are not shown.

It may be that you will not be able to see or change all of the following settings!   
  
In general the following settings are adjustable. They all refer to receiving notification of changes made to Tracker entries (tickets): 

* Selection box **Receive notifications about created tracker-items**: You will be informed of all modifications made to your own tickets provided you have entered ‘Yes’.
* Selection box **Receive notifications about assigned tracker-items**: You will be informed of all modifications made to tickets which where assigned to you.
* Selection box **Receive notifications as HTM**: You can determine whether notifications should be sent as HTML mail or text mail. As of version 1.4.002 notification through the internal notification module as a popup will also be possible.
* Selection box **Show actions in tracker listing**: Should the actions column in the tracker list-view be shown?
* Selection box **Allow default projects for tracker**: Allow the predefinition of projects that will be assigned to new tracker-items.

**Important**: The tracking system informs of all modifications regardless of who executes them. This means that you will also be informed of changes you yourself have carried out!!!

[Tracker configuration](http://community.egroupware.org/index.php?wikipage=ManualTrackerAdmin)

The **tracking system configuration** is relatively complex, thus allowing a precise definition of "who may do what when..." and its implementation in a variety of situations. Application administrators can define access rights and configurations on a global basis for all Tracker queues or separately for each queue. Queue-specific settings will be combined with the settings applicable for all queues for categories and employees. That is to say, technicians included in the bug queue incorporate those in 'all' plus those who are entered in bugs. In the configuration queue-specific settings take precedence over settings defined for all queues. [Access rights](http://community.egroupware.org/index.php?wikipage=ManualTrackerACL) are identical for all queues.   
  
The page is set up as follows:   
  
Left **Tracker Queue** selection box: You can either select a Tracker queue from the list or click 'all' if the configuration change needs to apply to everyone.   
At the top right **--> enter new name** and click on **[Add]** to create a new Tracker queue.   
  
Below this you will find three tabs containing the following information:

* **[Categories]** tab:

* **Categories**: All existing categories appear listed by **name**. In addition, you will find the selection box **Autoassign to** where you can define a responsible person for a Tracker entry in this category. You can select a user or a group to whom the entry will be automatically assigned when you [create a ticket](http://community.egroupware.org/index.php?wikipage=ManualTrackerEdit). To **add a new category** you must --> **enter new name**, select the responsible person and click on the **[Apply]** button located in the window underneath. To **delete a category** click on the  symbol at the end of the respective line.
* **Versions**: All existing versions are listed with **name** and the  symbol to **delete** the version. To **add a new version --> enter new name** and click on the **[Apply]** button found on the side.
* Status: The following statuses are predefined in the tracking system: open, closed, deleted and pending. Statuses beyond these are shown in a list with name and the  symbol to delete the respective status. To add a new status --> enter new name and click on the **[Apply]** button on the side.
* **Canned responses**: All existing standard replies are listed including **name**, the **canned response** text and the  symbol to **delete** the reply text. To **add a new reply --> enter new name** as well as the reply text and click on the **[Apply]** button on the side. This is also how you can change an existing text.

* **[Staff]** tab: In two selection boxes choose one or more users or user groups by holding down the CTRL key or clicking on the  symbol. Use the right selection box to define the Technicians and the right one to define Administrators. You can define the settings for each Tracker queue separately or globally. Only users who have been selected as **Technicians** or **Administrators** can be assigned a ticket as a responsible person!

* **[Configuration]** tab: This tab is composed of two different parts:

* **Configuration for all tracker queues**: You can define the following points:
* Selection box **Assigning groups**: Choose between 'No' then no group will be shown in the employee selection box and 'Yes, display groups first' or 'Yes, display users first'.
* Selection box **Allow voting** and **Allow bounties**: If you choose 'No' all fields and columns in this regard will remain hidden. In the **Currency** field determine a currency for the bounty.
* Selection box **Overdue after** and **close pending**: You can choose between 'never' and a number of days between 1-30. Accordingly, Tracker entries after this time become automatically overdue. Entries with a pending status are automatically closed if the entry is not processed in the allotted time.
* **ACL**: Use to define access rights for all **employees** and **anonymous users**.

Further details are available in the next chapter.

* **E-Mail notifications**: For each Tracker queue you can indicate a separate **sender address** from which notifications are sent. Moreover, using the [SiteMgr](http://community.egroupware.org/index.php?wikipage=SiteMgr) module you can enter a URL of the Tracker to display the Tracker queue on an external website. In addition, all changes can be displayed through the notification function, e.g. in a mailing list. To do this, enter the email address in **Copy to** and set the **Language** in which the notifications should be sent.

* **[Mail handling]** tab: Here you can enable the option to check a mailbox for incoming mails and handle those as ticket(replies).
* Selection box **Check mail interval**: Select the interval with which incoming mails should be checked. Set to *0* to disable.
* Text box **Read mail address**: If only one TO address should be read where more aliasses store to the same mailbox, enter this address here. Leave blank to handle all mails.
* Text box **Incoming mailserver** and select box **Mail server type**: This is used to identify the mailserver
* Text box **Portnumber** can be used to enter a portnumber if it differs from the default (143 for IMap and 110 for POP), and with text box **Incoming mailfolder**, a foldername can be entered. By default, *INBOX* is read.
* **Username** and **Password** are used to log in at the mailserver.

* **Incoming mail rules**:
* **Delete mails from server**: tag this if mails that where successfully handled, should be deleted
* **Tracker for new tickets**: select in which tracker queue new mails will be created, or *Reject* not to allow new tickets via mail.
* **Unrecognized mails**: Tracker tried to identify the sender of the email by matching the email address with known eGroupWare users. If this fails, the radiobuttun here can be used to specify what should be done with the mail:
* **Ignore**: Don't do anything; the mail is simply ignored.
* **Delete**: Don't do anything but delete the mail from the server, even if **Delete mails** in the mail rules is not tagged.
* **Forward**: Forward the mail to the email address specified here. The mail will be deleted *if* **Delete mails** is tagged.
* **Store as**: When the mail is a reply to an existing ticket, the mail contents can be stored as a comment. Select *Creator* to assume the ticket creator sent the mail, or *Nobody* to store the comment without user information.   
  If the mail cannot be matched with an existing ticket, select a default username with the select box **New tickets as** under which the ticket should be stored. Select *Reject* there to disallow ticket creation by unknown users (this will be ignored if *Reject* was selected in **Tracker for new tickets**).

Below the configuration tabs you will see the **[Save]**, **[Apply]** or **[Cancel]** buttons on the left.   
If you have chosen a concrete Tracker queue in the selection box at the top left, on the right you will see another button to **[Delete]** the entire Tracker queue. For security reasons you will receive an additional query: "Delete this Tracker including all its items and categories?". Once you click **[OK]** the Tracker queue will be totally deleted!!!

[Tracker access rights](http://community.egroupware.org/index.php?wikipage=ManualTrackerACL)

The access rights in the Tracker system are configured globally for all Tracker queues. They are located in the **Configuration** tab.   
  
In essence, the Tracker differentiates access rights among **Tracker admins**, **Technicians**, **Anonymous** and **Non-anonymous users** (i.e. registered users). Moreover, the **Item creator** and the **Item assignee (responsible person)** play a particular role and have additional predefined rights.   
  
The **tracking system configuration** is relatively complex, thus allowing a precise definition of "who may do what when..." and its implementation in a variety of situations.   
  
The configuration exists as a table and is laid out as follows:   
In each **line** you **allow fields to be edited**... by checking  off the blank box [] in the appropriate column. The **columns** differentiate **access rights** for individual **employees** and **anonymous users**.   
  
Here are a few examples: 

* **Summary** and **Description** fields: These two fields should only be able to be filled when you create an entry. Only the person responsible for the Tracker entry or the administrator may make later changes. The result is the following access rights:

Tracker admins , Technicians [], Non-anonymous users [], Everybody [], Item creator [], Item assignee

, New items  

* **Voting** or **Bounties** fields: The tracking system is made visible to the outside through the [SiteMgr](http://community.egroupware.org/index.php?wikipage=SiteMgr) module on the website. Anyone can **vote** for a specific bug to demonstrate that the correction of the problem is particularly important to him/her. In addition, **Feature requests** should be enabled in the Tracker queue to set premiums for certain entries in order to further development. Accordingly, access rights should be checked off for **everyone** under **Voting** and **Set premium**. Checking off other columns becomes unnecessary since this right becomes applicable to all.

You can determine in the **Staff** tab of the [application’s configuration](http://community.egroupware.org/index.php?wikipage=ManualTrackerAdmin) the user or user groups who are responsible for a Tracker queue as **Tracker admins** or **Technicians**.