

User Wizard - Set up the User Details screen

Starting in Tiki12.2, the User Wizard feature can include a specific screen to request extra information to your users, as well as to provide custom information for further clarifications or notes specific to your site or that campaign to collect more information.

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Step 1: Apply "User_Trackers" Profile

You must apply the profile "User & Registration Tracker" ("User_Trackers"). You can do so from the Profiles Admin Panel, or from the "Profiles Wizard" (in Tiki12).

Configure Tiki in 3 easy steps using Profiles

Profiles

Step 1: Use the Quick or Manual Filter option to see a list of Configuration Profiles you can apply

Option 2: Manual Filter

Filter the list of profiles:

Profile name:

Profile types:

Repository:

List

Step 2: Click on a Configuration Profile Name below to review it and to be able to apply it on your Web site

Profile Name	Repository	Profile type
User_Trackers applied	profiles.tiki.org	release, Mini-profile (can be included in other), 5.x, 9.x, 12.x, 13.x

Status

Profile repository	Status	Last update
http://profiles.tiki.org		2014-03-20 18:40:31

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Once the profile is applied, you will see the Instructions page with further instructions.

User_Trackers

After this profile installation,

1. Go to [tiki-admingroups.php?group=Registered](#)
2. Find "Users Information Tracker" field and select the newly created tracker "Users" from the dropdown, and hit **Save**
3. Pick the "login" from the newly appeared dropdown, and then click save again
4. In the text field called **Users Information Tracker Fields Asked at Registration Time...**, enter the fieldids for the fields of the **Users** tracker, which you want to be active on the user registration form. Then hit **Save** again.

1. [Add a user](#)
2. Become that user (SU)
3. Then, visit [tiki-view_tracker_item.php?view=+user](#) or go there from the right column module

Edit Source Rename History More ▴

Click to expand

Step 2: Edit group Registered

You need to go to manage groups, and edit group "Registered" (tiki-adminingroups.php?group=Registered&cookietab=2).

There you must indicate which tracker is the "**Users Information Tracker**", and which field carries the login field (tracker "Users" and field "1 - login" in the example at the screenshot). You can set just below the fields that are to be shown at registration time (fields 2:10:17:18 in the example at the screenshot). And just below that you are indicated that you can also set up a different combination of fields in the **User Wizard**, through the "**Login admin panel**" (tiki-admin.php?page=login).

The screenshot shows the 'Edit group Registered' form. The form has tabs for 'List', 'Edit group Registered', 'Members', and 'Import/Export'. The 'Edit group Registered' tab is active. The form contains the following fields:

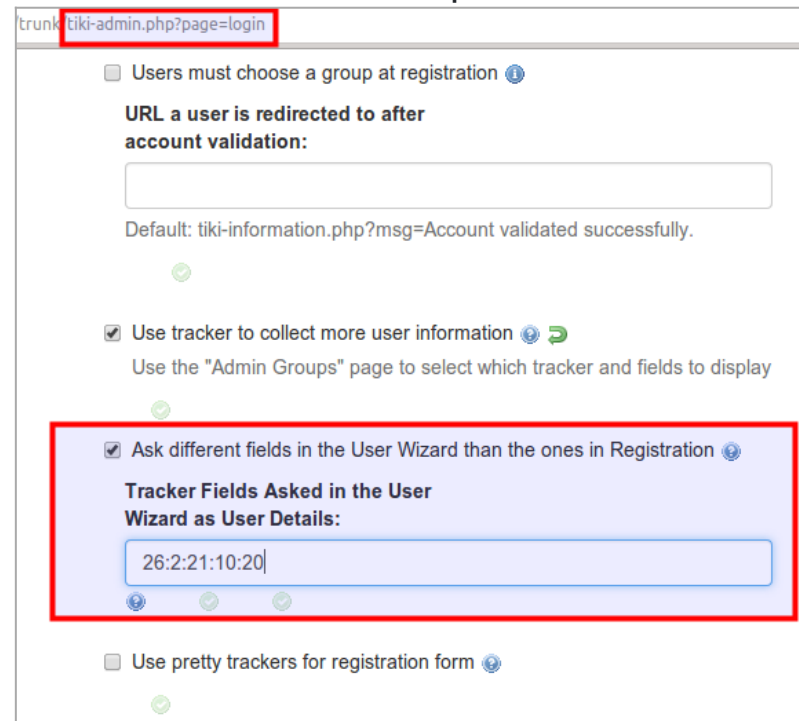
- Group:** Registered
- Description:** Blog user
- Inherit permissions directly from following groups:** A dropdown menu with 'None' and 'Anonymous' (selected).
- Also inheriting permissions from the following groups (indirect inheritance through the groups selected above):** None
- Group Homepage or Url:** Registered HomePage
- Default category assigned to uncategorized objects edited by a user with this default group:** none
- Users Information Tracker:** A section with two dropdown menus: 'Users' and '1 - login'. A red box highlights this section.
- Users Information Tracker Fields Asked at Registration Time:** 2:10:17:18
- Users Information Tracker Fields Asked in the User Wizard:** A section with a text box containing 'By default, the same fields as in Registration. You can choose in the Login admin panel to show different fields in User Wizard than the ones asked at Registration Time.' A red box highlights this section.
- Assign group management permissions:** A section with a 'Save' button.

Click to expand

Step 3 (optional): Choose in Login Admin Panel fields to be shown in the User Wizard

In the "Login Admin Panel" you can optionally choose to **"Ask different fields in the User Wizard than the ones in Registration"**, and then, indicate which fields from the User Tracker selected in the previous step. This is not compulsory, and if this preference is not selected, then the same fields shown at Registration time will be shown in the User Wizard.

In this example shown in the screenshot, the preference is enabled, and fields 26:2:21:10:20 where chosen to be shown in the User Details screen from the User Wizard, a part from the fields shown in the Registration process:



The screenshot shows the Tiki Admin Panel interface. The browser address bar at the top displays 'trunk tiki-admin.php?page=login'. The main content area contains several configuration options:

- ☐ Users must choose a group at registration ⓘ
- URL a user is redirected to after account validation:**

Default: tiki-information.php?msg=Account validated successfully.
- ☒ Use tracker to collect more user information ⓘ ➡
Use the "Admin Groups" page to select which tracker and fields to display
- ☒ Ask different fields in the User Wizard than the ones in Registration ⓘ
Tracker Fields Asked in the User Wizard as User Details:
- ☐ Use pretty trackers for registration form ⓘ

Below the 'Ask different fields' section, there are three small circular icons: a blue one with a question mark, and two green ones with checkmarks.

Click to expand

we go to see the fields from that User Tracker, we can see that field 26, for instance, is of type "static text" and is the one suitable to provide custom information for your users if you need to do so (latest news, why some extra information is requested, site policy updates, etc). The other fields are some selection of the long list of fields provided by default in that user tracker.

The screenshot shows the 'Admin Tracker: Users' interface. On the left, there's a 'Tracker fields' table with columns 'ID', 'Name', and 'Type'. Field 26, 'Note', is highlighted with a red box. To the right, the 'Edit Field' dialog is open, showing the 'General' tab. The 'Name' field is 'Note'. The 'Description' field contains a complex wiki-style syntax for a tabbed interface. Below the description, there's a checkbox labeled 'Description contains wiki syntax' which is checked. At the bottom of the dialog, there are buttons for 'OK' and 'Cancel'.

ID	Name	Type
26	Note	Static Text
1	login	User Selector
2	Name	Text Field
21	SkypeID	Text Field
3	Business Name	Text Field
4	Short Description	Text Field
5	Long Description	Text Area
6	Profession	Text Area
7	Products	Text Area
8	Services	Text Area
9	Bio	Text Area

Edit Field

General

Name:

Note

Description:

```
{TABS(name="Custom info" tabs="Read this first|Feedback" toggle="y" inside_pretty="n")}  
(:exclaim:) Take into consideration the latest changes in our site / organization. %%% %%%  
{FADE(label="Read more", icon="y")}  
* Some more information about this topic comes
```

☒ Description contains wiki syntax

Options for Static Text

Validation

Permissions

OK Cancel

Click to expand

And that's it. You can go to the User Wizard yourself to check that the new screen is shown with the fields you chose.

Close

Back

Save and Continue

User Details

Wizard Steps

- Welcome to the User Wizard
- User Preferences: Personal Information
- User Preferences: Settings
- User Watches: Report Preferences
- User Watches: Notification Preferences
- User Details**
- User Wizard Completed!

Use this form to fill in some extra information about you.

Extra information about you

Note

Read this first

Feedback

No Tabs

Take into consideration the latest changes in our site / organization.

Read more

- Some more information about this topic comes here...
- Some more information about this topic comes here...
- Some more information about this topic comes here...

Name *

John Doe

SkypeID

foo

Comments

My comments...

Facebook page

...

*Fields marked with an * are mandatory.*

Click to expand