

Customizing Sections

Customizing Sections

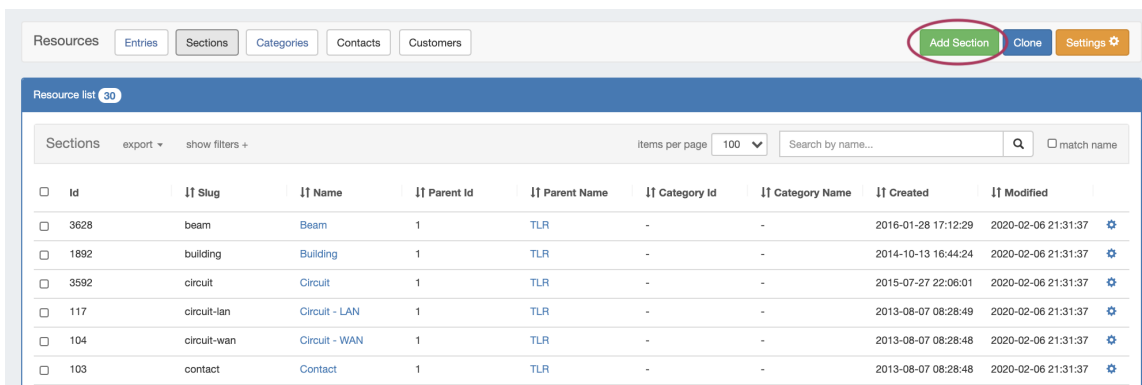
You can create as many sections as you wish (Firewall, Server, VM, Virtual Interface, etc.) and customize the gadgets and fields that apply to each section.

For example, you may not need to track the console port for your virtual firewall, so you would simply not use that field for the "Virtual Firewall" section. This way you can still track the console port for your physical firewalls like normal.

- Customizing Sections
 - Create a New Section
 - Edit a Section
 - Add Fields to a Section
 - Edit Field Data
 - Designate Default Fields
 - Add Gadgets to a Section
 - Additional Information

Create a New Section

Click "Add Section" from the **Sections** view button under the Resources Tab



Create a new section by specifying a name and category. Then hit the "Create" button.

A screenshot of the 'Add Resource' dialog box. It has a title bar 'Add Resource'. Inside, there are two main sections: 'Name' and 'Category'. The 'Name' section has a text input field with 'Some New Section' and a label 'Add or change the resource name'. The 'Category' section has a dropdown menu with 'QA Test Category' and a label 'Add resource to category'. At the bottom, there are three buttons: 'clear', 'Create' (circled in red), and 'Close'.

Edit a Section

There are two ways to access the edit section screen.

You can manage existing sections by opening the Action Menu for the section, then clicking "Edit".

<input type="checkbox"/>	14686	some-new-section	Some New Section	1	TLR
<input type="checkbox"/>	99	switch	Switch		LR
<input type="checkbox"/>	14682	6c-systemas	SystemAS		LR
<input type="checkbox"/>	3729	user	User		LR
<input type="checkbox"/>	931	virtual-dc	Virtual DC		LR

You can also access the edit screen from the section's entry list. Open the filter panel at top and click the link at the bottom.

Resources

EntriesSectionsCategoriesContactsCustomers

Add EntryCloneSettings

Resource list 1

Entries

exportchart viewhide filters 2

items per page 100

Search by name...

match name

Section:

Some New Section

Category:

Select a category...

Resource Type:

Entry

Parent:

Select a parent...

Attribute name:

name...

Attribute Value:

value...

Edit Some New Section section here

Id

Slug

Name

Parent Id

Parent Name

Category Id

Category Name

Created

7603

qa-test-resource-8-76...

QA Test Resource 8

7021

QA Test Resource 2

-

-

2022-12-02 16

The edit section area is organized into three tabs: "Basic Information", to perform quick edits to the section name or category, "Manage Fields" to update or assign fields to the section, and "Manage Gadgets" to add, edit, relocate, or remove gadgets associated with the section.

Resources / Sections / Some New Section / Edit

Edit Section

Basic Information

Manage Fields 0

Manage Gadgets 1

Edit basic section information.

Common settings

Name*

Some New Section

Change the section name

Category

QA Test Category

Add section to category

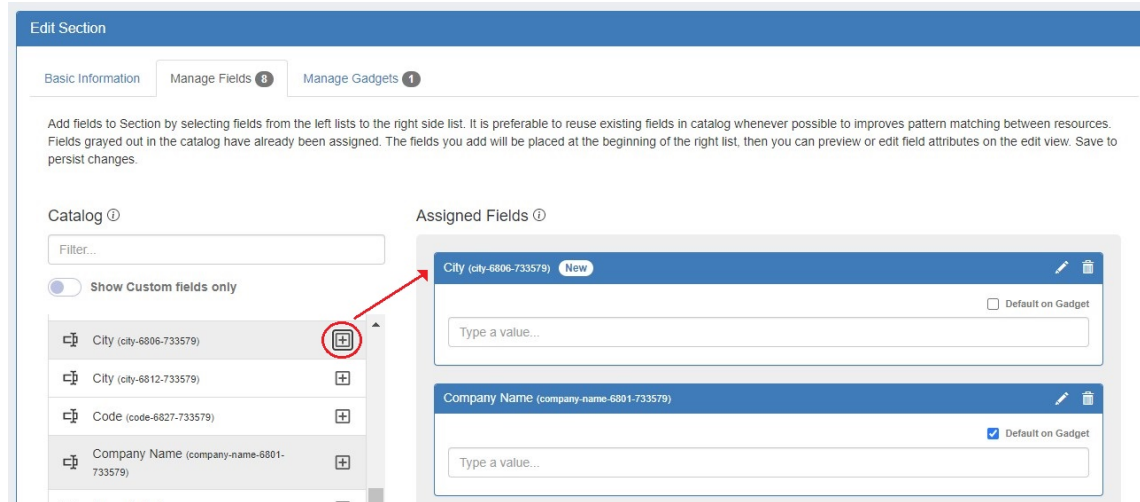
* Indicates required fields

Delete

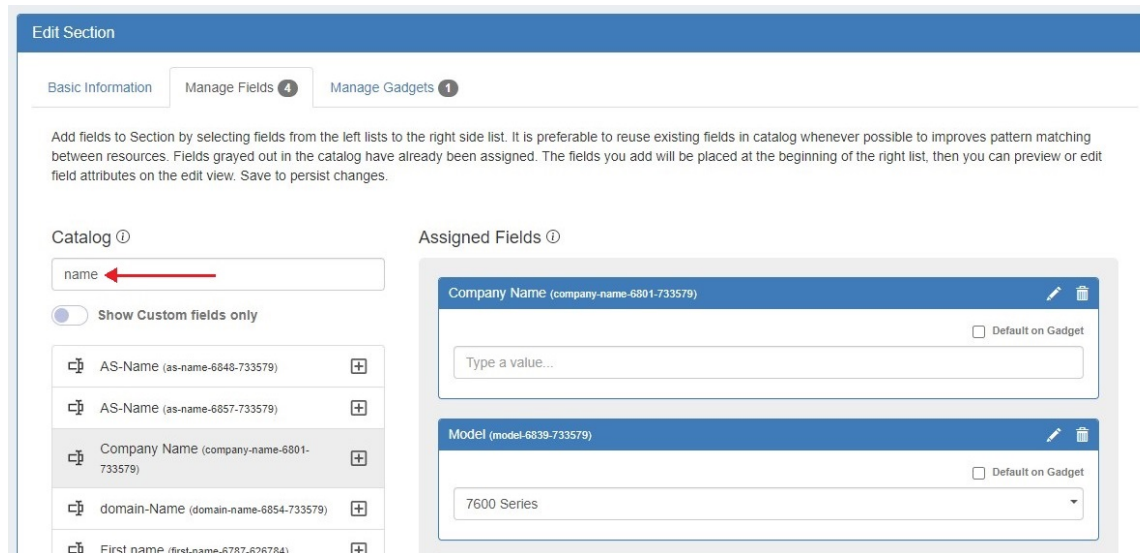
CancelSave

Add Fields to a Section

From the Manage Fields tab, you can add new custom fields of different types (text input, text area, choice box, radios, checkbox, encrypted) as well as any existing fields that are available by clicking the + icon next to the field name. See the [Customizing Fields](#) page for more details.



To search for an existing field, type a field name into the searchbox. Fields already added to the section are shaded grey. You may add duplicate fields to a section, but this is discouraged and a confirmation message will prompt you to confirm that you wish to add the duplicate field. To remove a field, click the delete (trash can) icon. This will remove the field from the "Assigned Fields" column, but the field will still exist for repeat use.



To view only unedited custom fields, enable the toggle below the searchbox. These are fields that do not technically exist yet. Once a blank field is added to a section and customized further (by editing the Field data), it will then have a slug and be added to the Field Catalog for reuse on other sections.

Edit Section

Basic Information
Manage Fields 4
Manage Gadgets 1

Add fields to Section by selecting fields from the left lists to the right side list. It is preferable to reuse existing fields in catalog whenever possible to improves pattern matching between resources. Fields grayed out in the catalog have already been assigned. The fields you add will be placed at the beginning of the right list, then you can preview or edit field attributes on the edit view. Save to persist changes.

Catalog ⓘ

Filter...

Show Custom fields only

Text Input (no-slug)

Text Area (no-slug)

URL (no-slug)

Choice Box (no-slug)

Radios (no-slug)

Checkboxes (no-slug)

Encrypted data (no-slug)

Date Input (no-slug)

Assigned Fields ⓘ

Company Name (company-name-6901-733579)

Default on Gadget

Type a value...

Model (model-6839-733579)

Default on Gadget

7600 Series

Make (make-6838-733579)

Default on Gadget

Arista

Operating System (operating-system-7594-1535294)

Default on Gadget

Type a value...
OS

Edit Field Data

Once fields are added to a section, they may be renamed and have other attributes updated by clicking on the edit icon.

Edit Section

Basic Information
Manage Fields

Add fields to Section by selecting fields from the left lists to the right side list. It is preferable to reuse existing fields in catalog whenever possible to improves pattern matching between resources. Fields grayed out in the catalog have already been assigned. The fields you add will be placed at the beginning of the right list, then you can preview or edit field attributes on the edit view. Save to persist changes.

Catalog ⓘ

Filter...

Show Custom fields only

Text Input (no-slug)

Text Area (no-slug)

URL (no-slug)

Choice Box (no-slug)

Radios (no-slug)

Checkboxes (no-slug)

Encrypted data (no-slug)

Date Input (no-slug)

Assigned Fields ⓘ

Company Name (company-name-6901-733579)

Default on Gadget

Type a value...

Model (model-6839-733579)

Default on Gadget

7600 Series

Make (make-6838-733579)

Default on Gadget

Arista

Operating System (operating-system-7594-1535294)

Default on Gadget

Type a value...
OS

Edit Field

Field Name *
Model

Field Type
choicebox

Slug ⓘ
model-6839-733579

Field Category
Uncategorized

Help Text

Options
7600 Series
ASR 9000 Series
ASR 1000 Series
6500 Series
T Series
MX Series

Model
7600 Series

Sections Using This Field:
Server, Firewall, Router, Switch, Some New Section

Close Save

Any fields enabled here will be available to add to the field gadget, if desired.

Designate Default Fields

Users can designate fields be auto-added to the Field Gadget for all resources assigned to a section by selecting the checkbox "Default on Gadget".

Edit Section

Basic Information | **Manage Fields** | Manage Gadgets

Add fields to Section by selecting fields from the left lists to the right side list. It is preferable to reuse existing fields in catalog whenever possible to improves pattern matching between resources. Fields grayed out in the catalog have already been assigned. The fields you add will be placed at the beginning of the right list, then you can preview or edit field attributes on the edit view. Save to persist changes.

Catalog

Filter...

☒ Show Custom fields only

- 2nd Email (2nd-email-6832-733579)
- 2nd Phone (2nd-phone-6834-733579)
- A Side Interface (a-side-interface-9313-3315532)
- A Side Router (a-side-router-9312-3315532)
- Abuse POC (abuse-poc-9306-3315532)
- Admin Contact (admin-contact-9301-3315532)
- Admin POC (admin-poc-9304-3315532)
- API Key (api-key-9298-3315532)
- AS-Name (as-name-6848-733579)
- AS-Name (as-name-6857-733579)

Assigned Fields

- Phone Main** (phone-main-6802-733579)
☐ Default on Gadget
- Organization ID** (organization-id-6822-733579)
☒ Default on Gadget
- Username** (username-6844-733579)
☐ Default on Gadget
- Company Name** (company-name-6801-733579)
☒ Default on Gadget

Default fields cannot be removed from the Field Gadget. Non-default fields will be available to add to the gadget on a per resource basis via the dropdown. See [Working with the Field Gadget](#) for more information.

Resource View

Name: QA Test Resource 8 **Section:** Some New Section [edit](#)

ID: 7603 **Category:** Uncategorized

Fields

Add new field: [Add](#)

Company Name: x [Delete](#) Organization ID: x [Delete](#)

[Cancel](#) [Save](#)

Once you have added the desired fields to a section, click "Save" at bottom right.

Delete

Preview Form

Cancel

Save

Add Gadgets to a Section

Gadgets are modules of additional functionality that can be added to the UI of a given resource. From the Manage Gadgets tab, simply select the gadget you want to show for that section and hit "Add Gadget".

Edit Section

Basic Information

Manage Fields 7

Manage Gadgets 1

Gadgets are mini applications that can add extra features to the resources under this Section. Add Gadgets to display on the Resource Entry Page by selecting the gadget from the list (below, at left), and clicking "Add Gadget". You may click and drag added Gadgets to change their order on the page, or remove by selecting the delete icon.

Gadget list

Contact Info

Add Gadget

Fields

Fields gadget

Delete

Cancel

Save

Once added, you may organize them by dragging into the order you wish them to appear on the page. You may also remove added gadgets by clicking the "delete" icon.

Resource View

Display fundamental details about the resource.

Contact Info

This gadget adds a field editor for fields related to contact info (phone, address, ect).

Tech Info

Manage DNS Servers and ARIN Info.

IPAMv2

Internet Protocol address management - Version 2.

Contacts

This gadget allows you to associate Contacts with the entry.

Links

DNS

Resource Linkage

Create links to other resources.

Title of the gadget

Enter title

Choose relation

When done, click "Save".

Once added to the section, gadgets will be visible for all resources of that section.

For a detailed list of gadgets and descriptions, see the [Gadgets](#) page.

The "Save" function for each tab is applied independently. If you add or remove fields in the "Manage Fields" tab, then move to the "Manage Gadgets" tab to add or remove gadgets, and then save from there; your gadget changes will be saved, but your field changes will not be saved. You must save from each tab to retain changes to each area.

Additional Information

Continue on to the following pages for additional information on [Resources](#) in Provision:

- [Customizing Fields](#)
- [Gadgets](#)
- [Contact Manager](#)