

# Customizing Fields

## Working with Fields

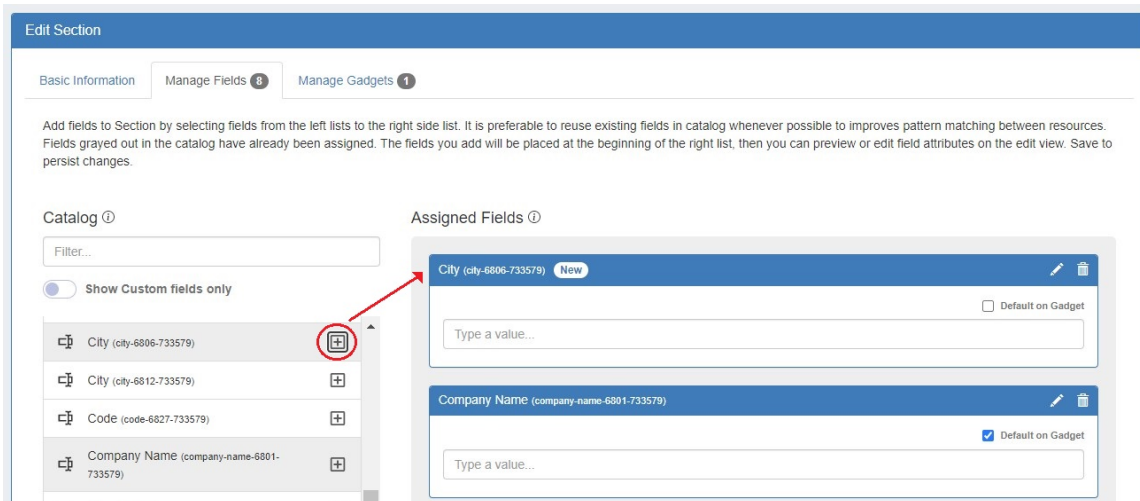
Fields are individual pieces of data that you can associate with a particular section. For example, you may want to have "Operating System", "Make", and "Model" fields for a server or device. ProVision includes many default fields to choose from, but you may also create custom fields and edit fields to suit your needs.

Once a field is added to a particular section, it will be available to add to the [Field Gadget](#) for later to edit, manage, or remove.

- Working with Fields
  - Add Existing Field to a Section
  - Add New Custom Field to a Section
  - Editing/Removing Fields
  - Previewing Fields
  - Default Fields
  - Using the Field Gadget
    - Manage Resource Fields
    - Exporting Fields
  - Additional Information

## Add Existing Field to a Section

To add a field to a section, click on the + icon of a field in the Field Catalog on the left and it will be added at the top of the "Assigned Fields" section on the right. 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 search for a specific field, type a field name into the searchbox.

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 ⓘ

name

Show Custom fields only

AS-Name (as-name-6849-733579)

AS-Name (as-name-6857-733579)

Company Name (company-name-6801-733579)

domain-Name (domain-name-6854-733579)

First name (first-name-6787-626784)

Assigned Fields ⓘ

Company Name (company-name-6801-733579)

Type a value...

Default on Gadget

Model (model-6839-733579)

7600 Series

Default on Gadget

## Add New Custom Field to a Section

Users can add custom fields of various types (text input, text area, choice box, radios, checkbox, encrypted) to a section. To view only unedited custom fields, enable the toggle below the search box.

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-6801-733579)

Type a value...

Default on Gadget

Model (model-6839-733579)

7600 Series

Default on Gadget

Make (make-6838-733579)

Arista

Default on Gadget

Operating System (operating-system-7594-1535294)

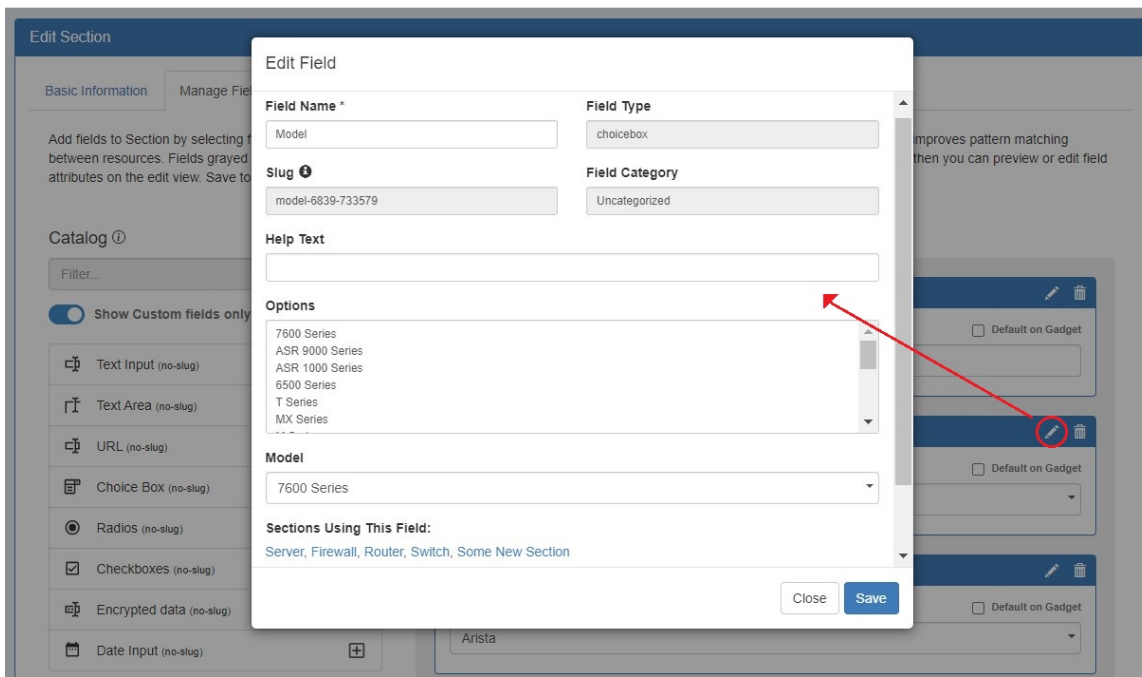
Type a value...

OS

Default on Gadget

## Editing/Removing Fields

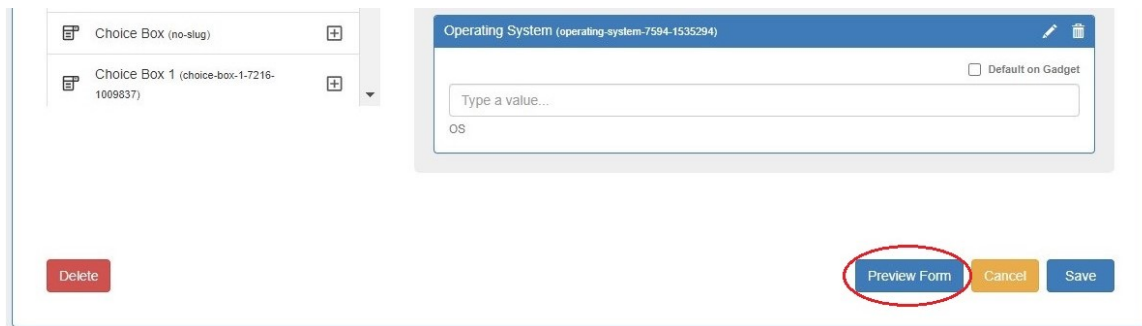
Once fields are added to a section, they may be renamed and have other attributes updated by clicking on the edit icon.



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.

## Previewing Fields

Fields can be previewed by clicking the "Preview Form" button at lower right.



This will open a modal where you can view and test how fields will look and behave.

The image shows a 'Preview Form' dialog box with a white background and a thin grey border. It contains several form fields arranged vertically. At the top is the title 'Preview Form'. Below it are five text input fields, each with a label above it: 'Phone Main', 'Organization ID', 'Username', 'Company Name', and 'Model'. The first four are standard text boxes with a light grey border and placeholder text 'Type a value...'. The 'Model' field is a dropdown menu with '7600 Series' selected. Below these are two more dropdown menus: 'Make' with 'Arista' selected, and an unlabeled dropdown menu at the bottom. A 'Close' button is located in the bottom right corner. The dialog box is overlaid on a blurred background of a spreadsheet or data table.

Preview Form

Phone Main

Type a value...

Organization ID

Type a value...

Username

Type a value...

Company Name

Type a value...

Model

7600 Series

Make

Arista

Close

## Default Fields

Users can designate fields to be auto-added to the Field Gadget for all resources assigned to a section by selecting the checkbox "Default on Gadget" once a field has been added to the Assigned Fields column.

Edit Section

Basic Information
Manage Fields 7
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

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

Type a value...

Organization ID (organization-id-6822-733579)
☒ Default on Gadget

Type a value...

Username (username-6844-733579)
☐ Default on Gadget

Type a value...

Company Name (company-name-6801-733579)
☒ Default on Gadget

Type a value...

## Using the Field Gadget

The Field Gadget displays the information fields that have been added to the section, and have been added for the specific resource that is being viewed.

Fields

Hostname:
6connect.com.

Operating System:
Some OS

Text Input:
Some Text

Radios:
Option one

Text Area:
Something

Checkboxes:
Option two : Checked

Edit

Users may add enabled fields to the resource, edit field values, and remove fields from the resource through this gadget.

## Manage Resource Fields

The Field Gadget and the individual fields must both be **enabled and added to the resource's section** before they can be used in the Field Gadget on the resource entry page.

Once the fields are added to the section, they will be available to add to the Field Gadget for any resource of that section, from the Field Gadget's "Add New Field" dropdown.

To Add, Edit, or Remove fields, click the "Edit" Button at the bottom right corner of the Field Gadget.

Fields

Hostname:	6connect.com.	Operating System:	Some OS
Text Input:	Some Text	Radios:	Option one
Text Area:	Something	Checkboxes:	Option two : Checked

Edit

To add an available field to the gadget, select one of the available fields from the "Add New Field:" dropdown, then click "Add".

Once added, the field will be available to edit or remove.

Fields

Add new field: URL Add

Hostname:	6connect.com. x Delete	Operating System:	Some OS x Delete
Text Input:	Some Text x Delete	Radios:	<input checked="" type="radio"/> Option one <input type="radio"/> Option two Delete
Text Area:	Something Delete	Checkboxes:	<input type="checkbox"/> Option one <input checked="" type="checkbox"/> Option two Delete

Cancel Save

Edit the field value(s) by typing into the input box, and/or selecting the desired option, then click "Save". You may also remove a field from the gadget by clicking "Delete" - it will be available to re-add later, if needed.

Fields

Add new field: Add

Hostname:	6connect.com. x Delete	Operating System:	Some OS x Delete
Text Input:	Some Text x Delete	Radios:	<input checked="" type="radio"/> Option one <input type="radio"/> Option two Delete
Text Area:	Something Delete	URL:	x Delete
Checkboxes:	<input type="checkbox"/> Option one <input checked="" type="checkbox"/> Option two Delete		

Cancel Save

When done with your edits, click "Save" to return to view mode.

### A Note on Default Fields

Because default fields cannot be removed from the Field Gadget, the "Delete" button for these fields appears slightly shaded.

Fields

Add new field:  Add

Company Name:  x Delete Organization ID:  x Delete

Make:  x ▼ Delete Model:  x ▼ Delete

Cancel Save

## Exporting Fields

Resource entry pages have an "Export As CSV" button, which generates a .csv file containing the resource's basic field information.

To export the resource, click the "Export as CSV" button in the header on the resource entry page.

Resources Open Chart View Export as CSV

Resources / Entries / MyNewEntry

Resource View

Name:	Section:	edit
MyNewEntry (1234)	New Section	
ID:	Category:	
50281	Customer	

The downloaded .csv file will contain the fields containing values from the Resource View, Contact Info, Tech Info, and Resource Field Gadget (s), with the field name in the first column, and the field values in the second column.

	A	B	C
1	Name	A QA Entry	
2	Section	Resource Holder	
3	Category	QA	
4	Created	2019-06-27T13:32:02-0700	
5	Modified	2020-01-13T12:34:51-0800	
6	Street 1	123 Main St.	
7	City	Sometown, CA	
8	Zip	12234	
9	Street 1	123 Main St.	
10	City	Sometown, CA	
11	Zip	12234	
12	Phone Main	123456789	
13	Last Billing Date	awd	
14	Country	DZ	
15	Country	DZ	
16	Residential Customer Privacy Enable	TRUE	
17	ns1	ns1	
18	Contract Number	12345	
19	Notes	Test	
20			
21			
22			
23			

## Additional Information

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

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