

Customizing Sections

Customizing Sections

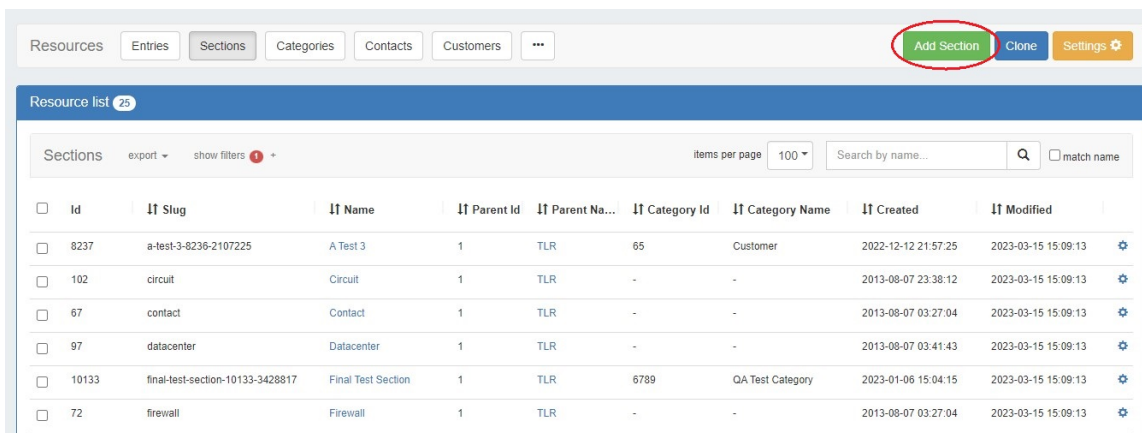
You can create as many sections as you wish (Firewall, Server, VM, Virtual Interface, etc.) and customize the gadgets and fields that apply to each section.

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
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 - Designate Default Fields
 - Apply a Constraint to a Field
 - Add Gadgets to a Section
 - Additional Information

Create a New Section

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



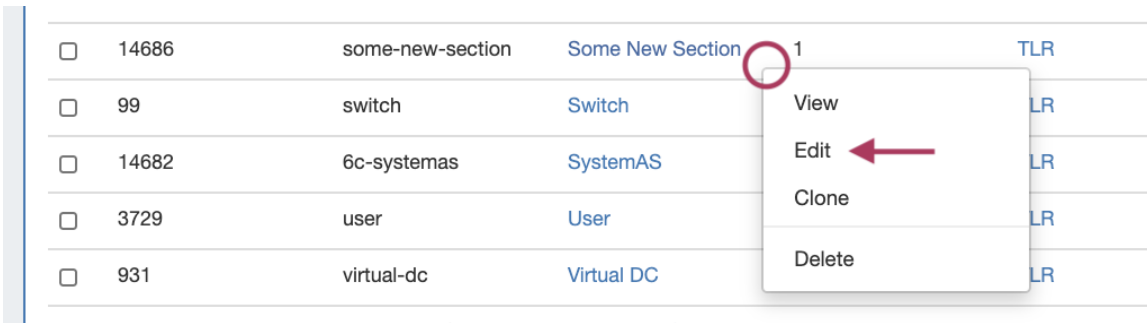
Create a new section by specifying a name and category. Then hit the "Create" button.

A screenshot of the 'Add Item' form. The form has two main sections: 'Name' and 'Category'. The 'Name' section has a text input field containing 'Some New Section' and a label 'Add or change the resource name'. The 'Category' section has a dropdown menu showing 'QA Test Category' and a label 'Add resource to category'. At the bottom of the form, there are three buttons: 'clear', 'Create' (highlighted with a red circle), and 'Close'.

Edit a Section

There are two ways to access the edit section screen.

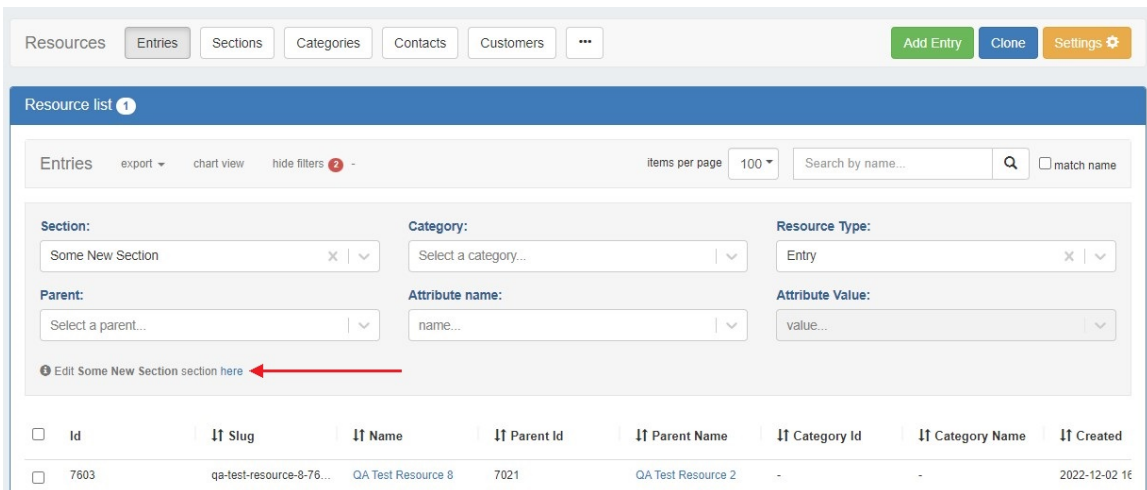
You can manage existing sections by opening the Action Menu for the section, then clicking "Edit".



A screenshot of a table with five rows. The first row is highlighted. An action menu is open for the first row, showing options: View, Edit, Clone, and Delete. A red arrow points to the 'Edit' option.

☐	14686	some-new-section	Some New Section	1	TLR
☐	99	switch	Switch		LR
☐	14682	6c-systemas	SystemAS		LR
☐	3729	user	User		LR
☐	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.



A screenshot of the 'Resource list' filter panel. It shows various filters for Entries, Sections, Categories, Contacts, and Customers. At the bottom, there is a link 'Edit Some New Section section here' with a red arrow pointing to it.

Resources: Entries Sections Categories Contacts Customers ...

Buttons: Add Entry Clone Settings

Resource list 1

Entries export chart view hide filters 2 items per page 100 Search by name... match name

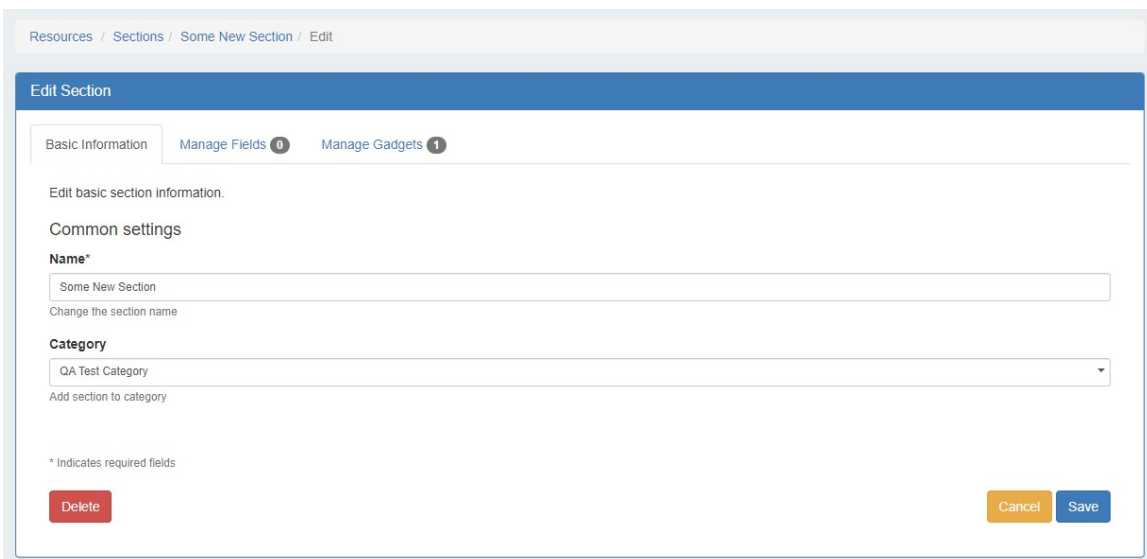
Section: Some New Section Category: Select a category... Resource Type: Entry

Parent: Select a parent... Attribute name: name... Attribute Value: value...

1 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.



A screenshot of the 'Edit Section' form. It has three tabs: Basic Information, Manage Fields, and Manage Gadgets. The 'Basic Information' tab is active, showing fields for Name and Category. There are buttons for Delete, Cancel, and Save.

Resources / Sections / Some New Section / Edit

Edit Section

Basic Information Manage Fields Manage Gadgets

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 Cancel Save

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.

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 ①

Filter...

☐ Show Custom fields only

- City (city-6806-733579) +
- City (city-6812-733579) +
- Code (code-6827-733579) +
- Company Name (company-name-6801-733579) +

Assigned Fields ①

- City (city-6806-733579) **New**
Type a value... ☐ Default on Gadget
- Company Name (company-name-6801-733579)
Type a value... ☒ Default on Gadget

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.

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 ①

name

☐ Show Custom fields only

- AS-Name (as-name-6848-733579) +
- 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 ①

- Company Name (company-name-6801-733579)
Type a value... ☐ Default on Gadget
- Model (model-6839-733579)
7600 Series ☐ Default on Gadget

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 17

Manage Gadgets 17

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

✓

Checkboxes (no-slug)

Choice Box (no-slug)

Date Picker (no-slug)

Datetime Picker (no-slug)

Encrypted data (no-slug)

Radios (no-slug)

Text Area (no-slug)

Text Input (no-slug)

Time Zone (no-slug)

URL (no-slug)

Assigned Fields ⓘ

Abuse POC (field-abuse-poc-6993-103245718) ⚠ Constrained Field

Type a value....

2nd Email (field-2nd-email-7011-103245718) ⚠ Constrained Field

Type a value....

Time Zone (field-time-zone-7023-103245718)

Type a value....

IPv4 Address (field-ipv4-address-7035-103245718)

Type a value....

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

Delete

Preview Form

Cancel

Save

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.

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

Add a Dependent Field

Dependent fields improve data accuracy by limiting the information able to be entered in a field dependent on the information entered in another (i.e. make/model). Dependencies may only be added to choicebox type fields.

To add a dependent field, you must first set up the field on which it will be dependent. Add a choicebox field from the catalog and open edit. Add options, then add children to the options. Click save. If adding a new custom field, you will need to save from the main "Manage Fields" tab as well.

To add the dependent field, add another choicebox field. Open edit and enable the "Create Dependency" selector. Choose a Parent Field from the dropdown and click save. Remember to click save again before exiting the tab.

The 'Edit Field' modal contains the following elements:

- Field Name ***: Text input with 'Pet Type'.
- Field Type**: Dropdown menu with 'choicebox' selected.
- Slug ⓘ**: Empty text input.
- Field Category**: Dropdown menu with 'Uncategorized' selected.
- Help Text**: Empty text input.
- Sections Using This Field:** Displays 'No Sections'.
- Create Dependency ⓘ**: A toggle switch that is turned on, circled in red.
- Parent Field**: A dropdown menu showing 'Pets Choice (field-pets-choice-16794-5987293-16794-5987293)' with a downward arrow, circled in red.
- Buttons**: 'Close' and 'Save' buttons at the bottom right, with 'Save' circled in red.

Once the fields are added to the section, they are available in the Fields Gadget and Edit Fields modal.

The 'Fields' modal displays a list of fields for a resource:

- Header**: 'Fields' title and a description: 'Resource's Fields. You must visit the Edit Section page if you want to add new fields or remove existing ones. Default fields cannot be deleted.' An 'Add field' button with a 'Select...' dropdown is on the right.
- Field List**:
 - Admin POC (default)**: Text input with 'test' and a delete icon.
 - Description**: Text input with 'test' and a delete icon.
 - Checkboxes (default)**: Two checkboxes, 'Option 1bb' and 'Option 2a', each with a delete icon.
 - Pets Choice**: Dropdown menu with 'Cats' selected and a delete icon.
 - Pet Type**: Dropdown menu with 'Select...' selected, showing a list of options: 'Select...', 'Tabby', 'Calico', and 'Tuxedo'. It has a delete icon.
- Footer**: A warning message: '⚠ Password fields must be encrypted before the update. Unencrypted values will be encrypted.' and 'Save' and 'Cancel' buttons.

Categories
Contacts
Customers

Resource Fields: **SA New Resource**

Edit resource's Fields. You must visit the Edit Section page if you want to add new fields or remove existing ones.

⚠ Password fields must be encrypted before the update. Unencrypted values are ignored.

Fictional Detectives
(checkboxes)

☐ Ms. Marple
☐ Sherlock Holmes
☐ Nero Wolfe
☐ Hercule Poirot

Time Zone
(timezone)

Select...

Pets Choice
(choicebox)

Cats

Pet Type
(choicebox)

Select an option

Select an option
Tabby
Calico
Tuxedo

ⓘ The values which do not meet

Update & Close
Update
Close

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 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...

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:

An Example Resource 2 (1234)

ID:

15847

Section:

Some New Section

Category:

Customer

Edit

Fields

Resource's Fields. You must visit the Edit Section page if you want to add new fields or remove existing ones. Default fields cannot be deleted.

Add field

Select...

Note

Admin POC

First Name

Last Name

Save

Cancel

Company Name (default)

Organization ID (default)

enter a value...

enter a value...

⚠ Password fields must be encrypted before the update. Unencrypted values are ignored.

Apply a Constraint to a Field

The Constraints system allows Admin users to configure custom field validation and limitations into Resource fields. Many constraint types are available to create in the Admin section. For more details on creating constraints see the [Constraints](#) section in the Admin Guide.

To apply a constraint to a field, open the edit modal for an assigned field. Select a constraint from the dropdown and click "Save".

Edit Section

Basic Information

Manage Fields 17

Add fields to Section by selecting fields from resources. Fields grayed out in the catalog edit view. Save to persist changes.

Catalog

Filter...

Show Custom fields only

Checkboxes (no-slug)

Choice Box (no-slug)

Date Picker (no-slug)

Datetime Picker (no-slug)

Encrypted data (no-slug)

Radios (no-slug)

Text Area (no-slug)

Text Input (no-slug)

Edit Field

Field Name *

2nd Email

Field Type

text

Slug

field-2nd-email-7011-103245718

Field Category

Uncategorized

Help Text

Constraint

Email 1

✕

▼

This constraint will be applied globally to this field across all sections that include it. This ensures consistency and uniformity in the data entered.

Sections Using This Field:

Contact, QA Test Section 1

Close

Save

Constrained Field

✎

✕

Default on Gadget

☐

Constrained Field

✎

✕

Default on Gadget

☒

Constrained Field

✎

✕

Default on Gadget

☐

Applying a constraint to a field affects all sections to which a field is assigned. In the above example, adding a constraint to a field in QA Test Section 1 will also apply the constraint to the field in the Contact Section. You can see which sections are using the field displayed in the Edit Field modal.

Once a constraint is applied to a field, it will be visible to the user.

2nd Email (field-2nd-email-7011-103245718)

Constrained Field

☒ Default on Gadget

Type a value...

A constrained field is available to edit from the Resource List Edit Fields modal and the Resource's Fields Gadget.

When a field is viewed that has a constraint applied, a "check" icon will display next to the field name. In this example, a Length Min constraint has been applied to the field "Abuse POC", so if we enter less than three characters into that field, we should get an error and see a visual indicator that the input does not meet the constraint settings.

Resource Fields: QA Test Resource

Edit resource's Fields. You must visit the Edit Section page if you want to add new fields or remove existing ones.

Password fields must be encrypted before the update. Unencrypted values are ignored.

Abuse POC
(text)

ab

2nd Email
(text)

enter email

Time Zone
(text)

enter a value...

IPv4 Address
(text)

enter a value...

Hostname
(text)

at least 3

Description
(textarea)

enter a value...

The values which do not meet the constraints will not be saved.

Update & Close

Update

Close

Fields

Resource's Fields. You must visit the Edit Section page if you want to add new fields or remove existing ones. Default fields cannot be deleted.

Add field

Select...

Abuse POC
ab

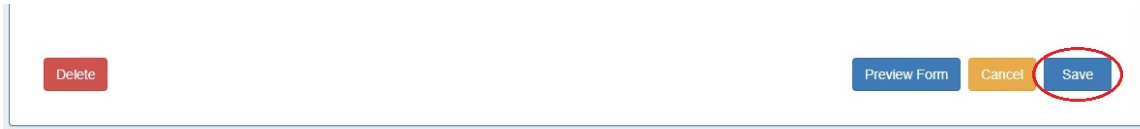
2nd Email
enter email

Password fields must be encrypted before the update. Unencrypted values are ignored.

Save

Cancel

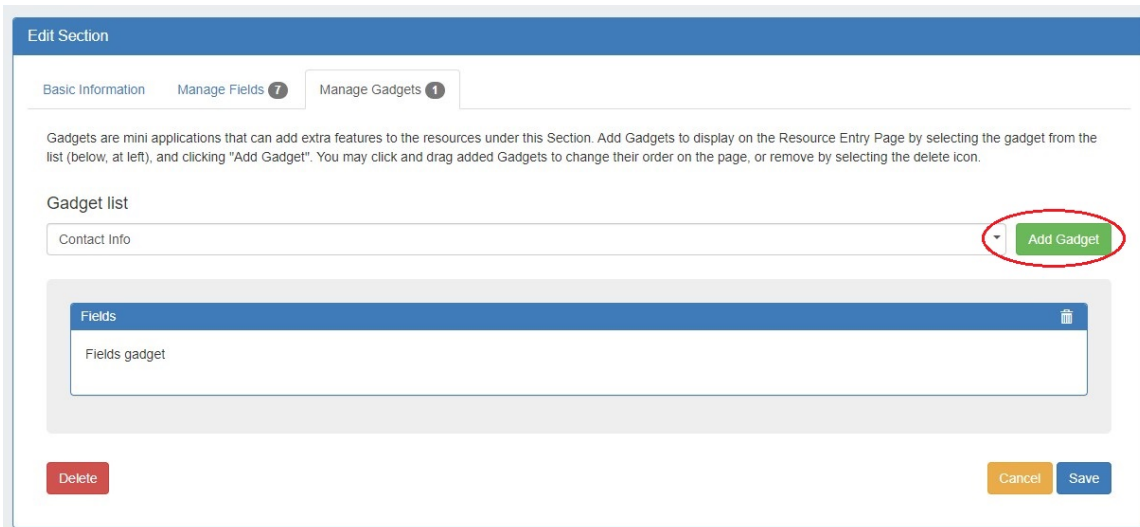
Remember to click "Save" at bottom right after you make any changes.



Buttons: Delete, Preview Form, Cancel, Save (circled in red)

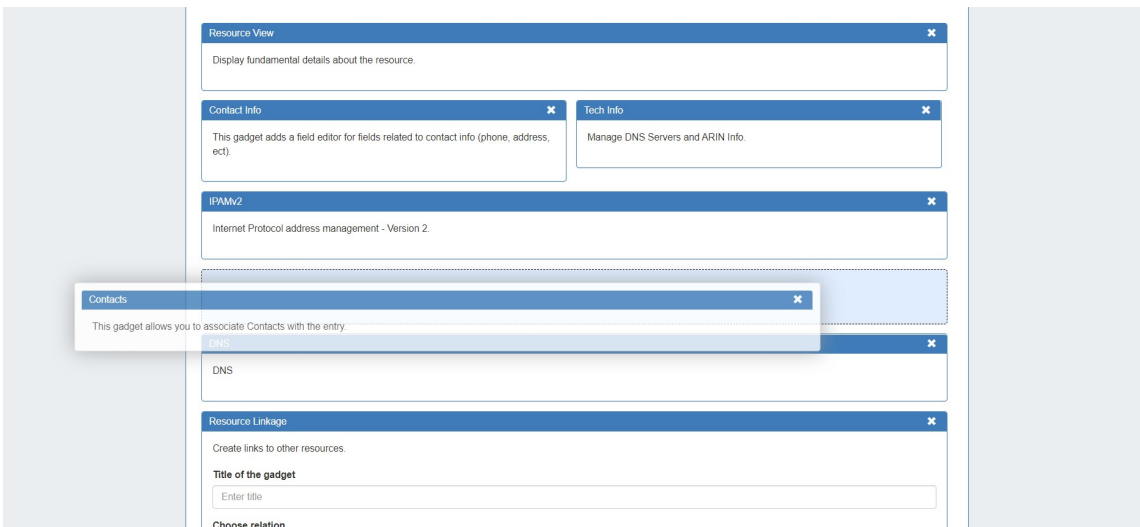
Add Gadgets to a Section

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".



Buttons: 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.



Buttons: X (close icons for each gadget)

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](#):

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