Customizing Sections

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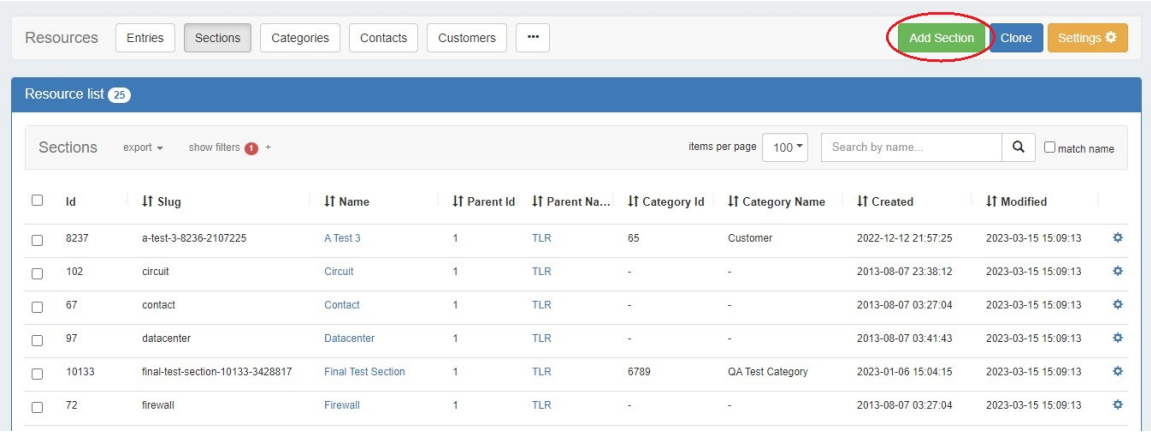
You can create as many sections as you wish (Firewall, Server, VM, Virtual Interface, etc.) and customize the gadgets and fields that apply to each section.

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
    - Add a Dependent Field
    - 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



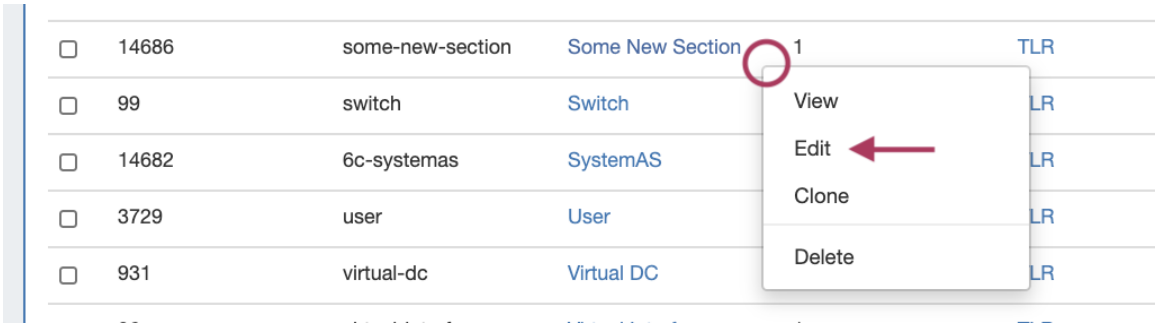
Create a new section by specifying a name and category. Then hit the "Create" button.



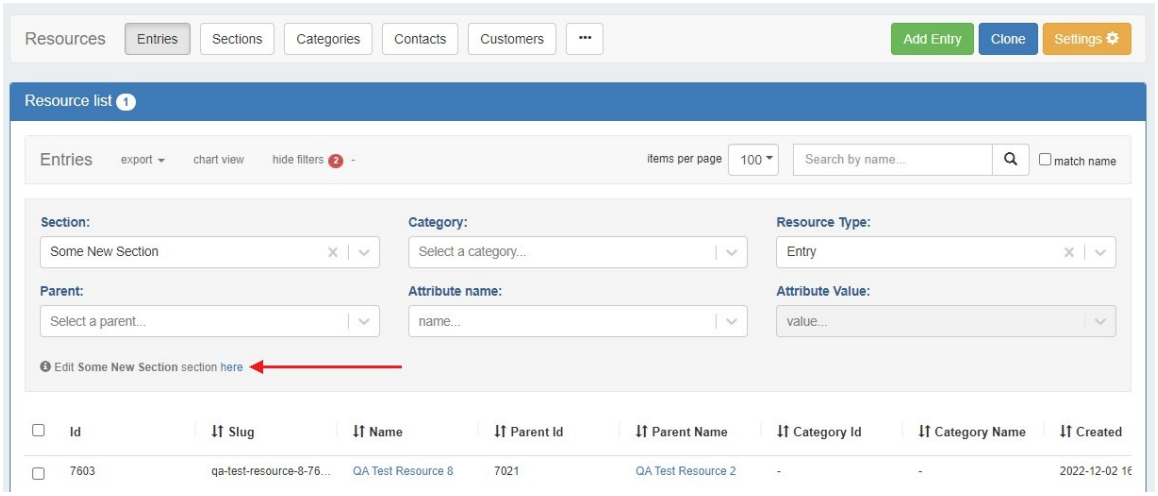
Edit a Section

There are two ways to access the edit section screen.

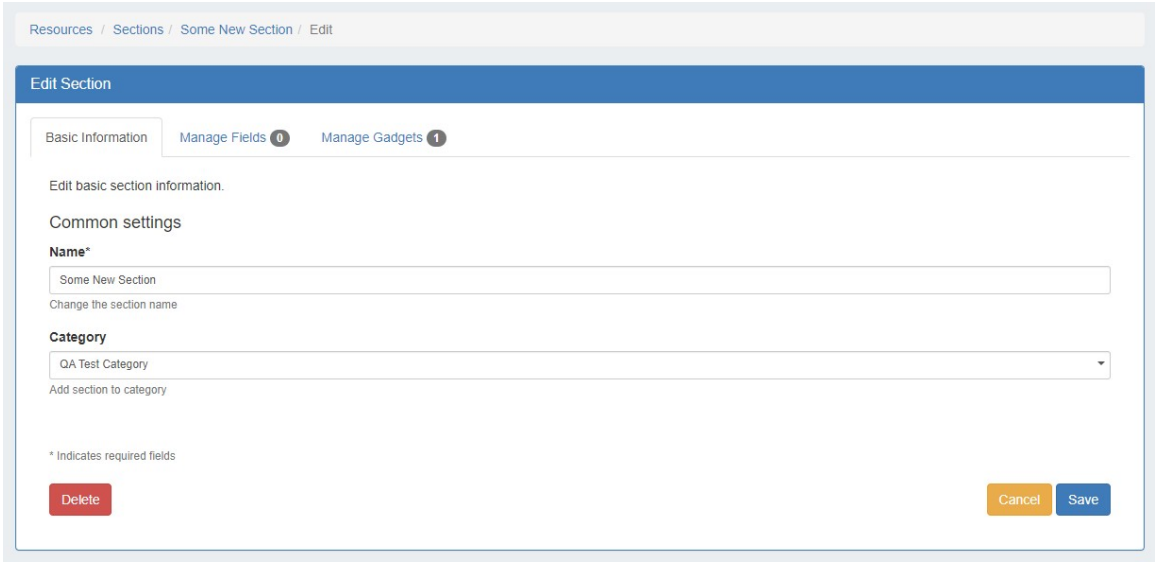
You can manage existing sections by opening the Action Menu for the section, then clicking "Edit".



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.

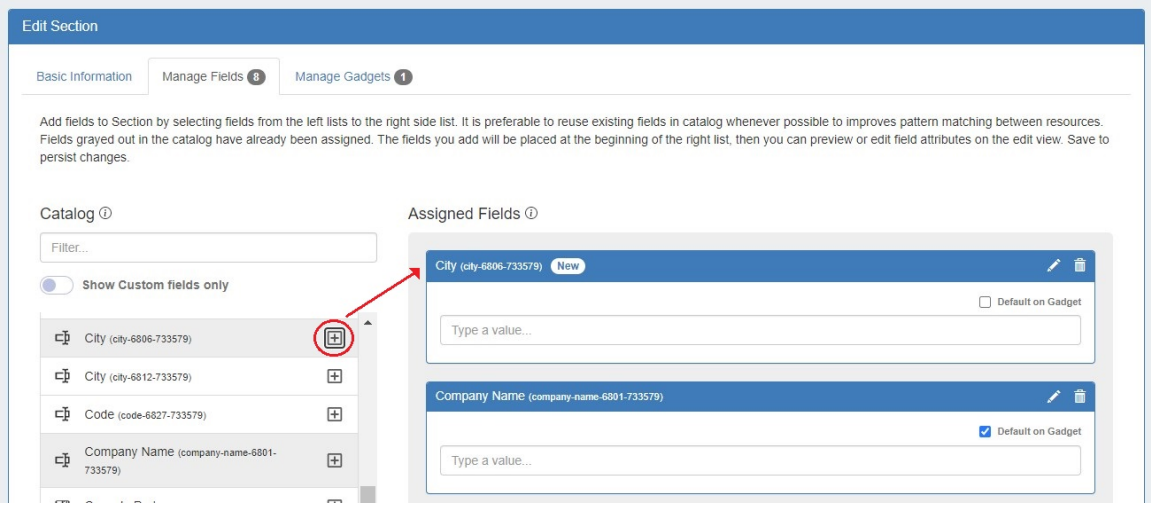


The edit section area is organized into three tabs: "Basic Information", to perform quick edits to the section name or category, "Manage Fields" to update or assign fields to the section, and "Manage Gadgets" to add, edit, relocate, or remove gadgets associated with the section.

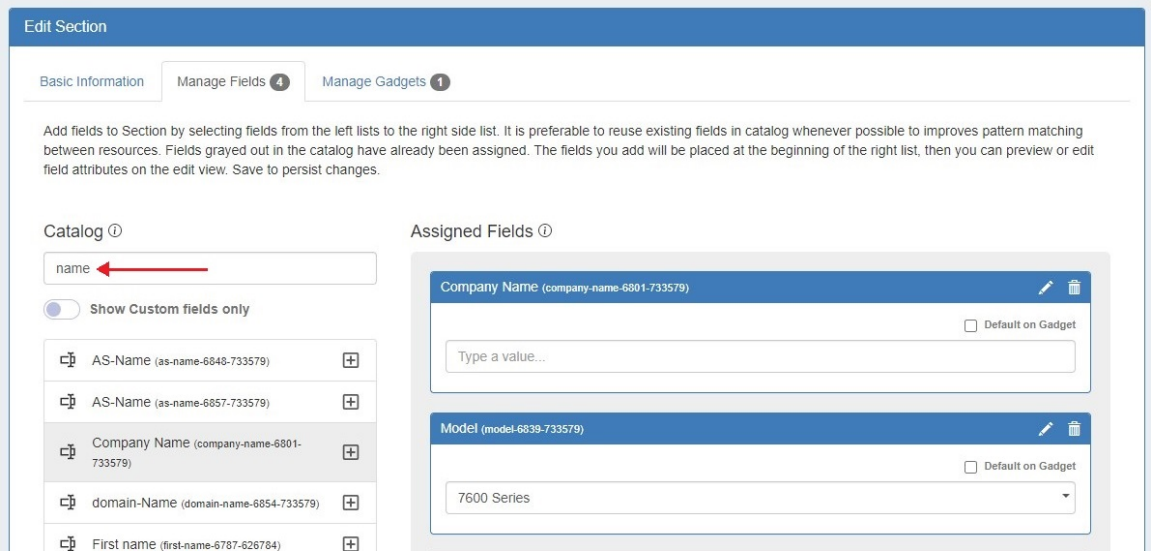


Add Fields to a Section

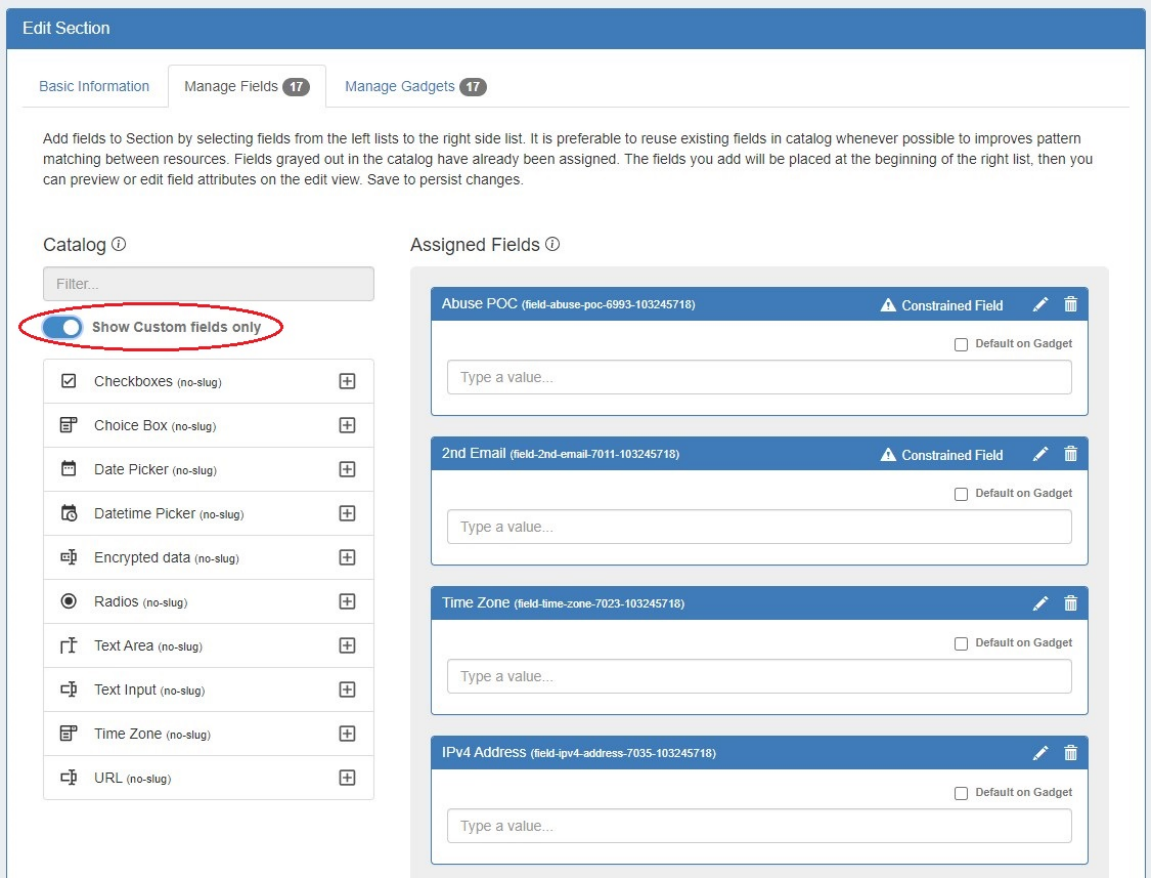
From the Manage Fields tab, you can add new custom fields of different types (text input, text area, choice box, radios, checkbox, encrypted) as well as any existing fields that are available by clicking the + icon next to the field name. See the Customizing Fields page for more details.



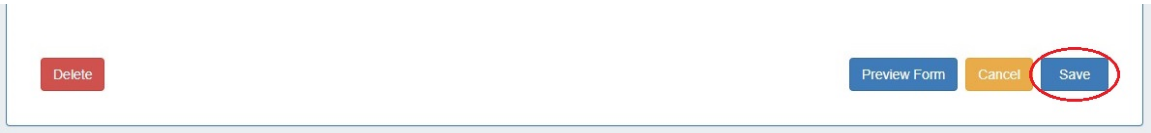
To search for an existing field, type a field name into the searchbox. Fields already added to the section are shaded grey. You may add duplicate fields to a section, but this is discouraged and a confirmation message will prompt you to confirm that you wish to add the duplicate field. To remove a field, 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.

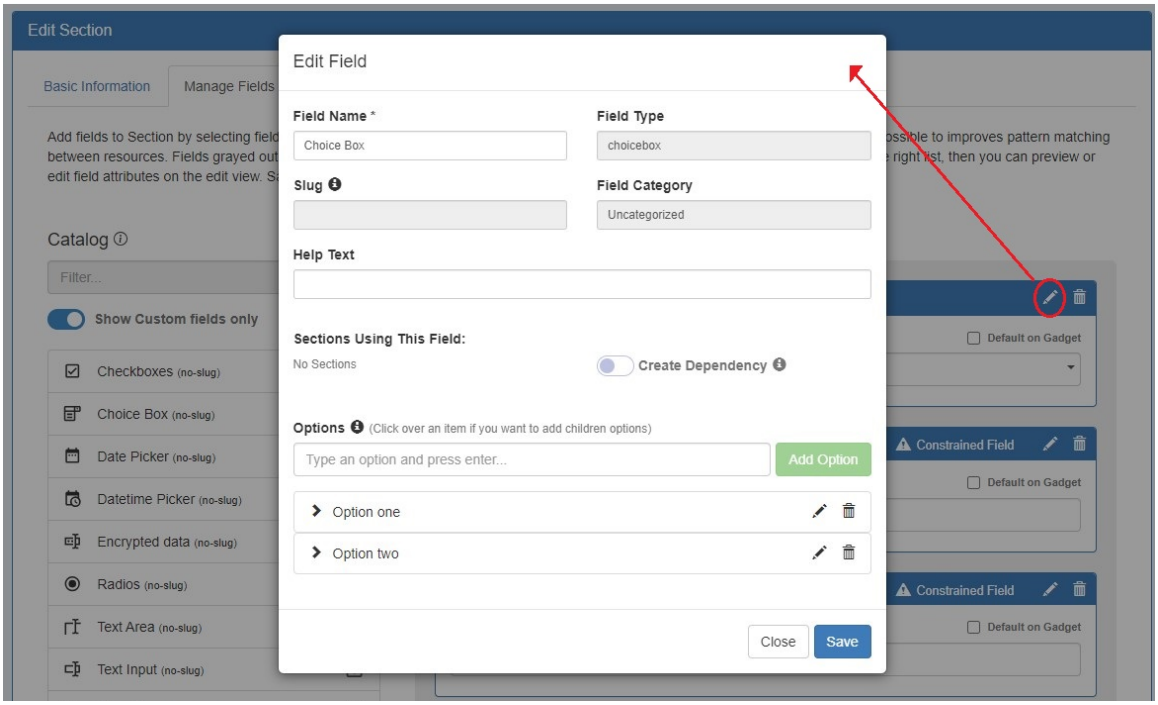


Once you have added the desired fields to a section, click "Save" at bottom right.



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.

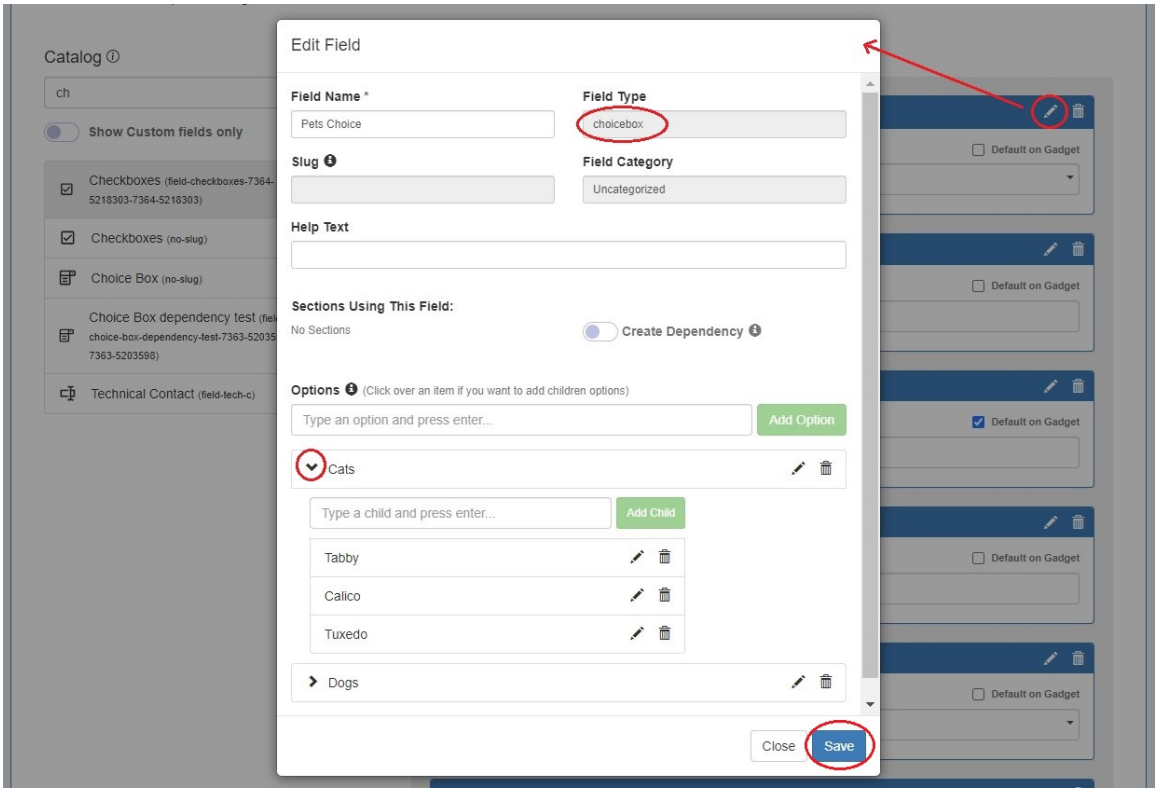


Any fields enabled here will be available to add to the field gadget, if desired.

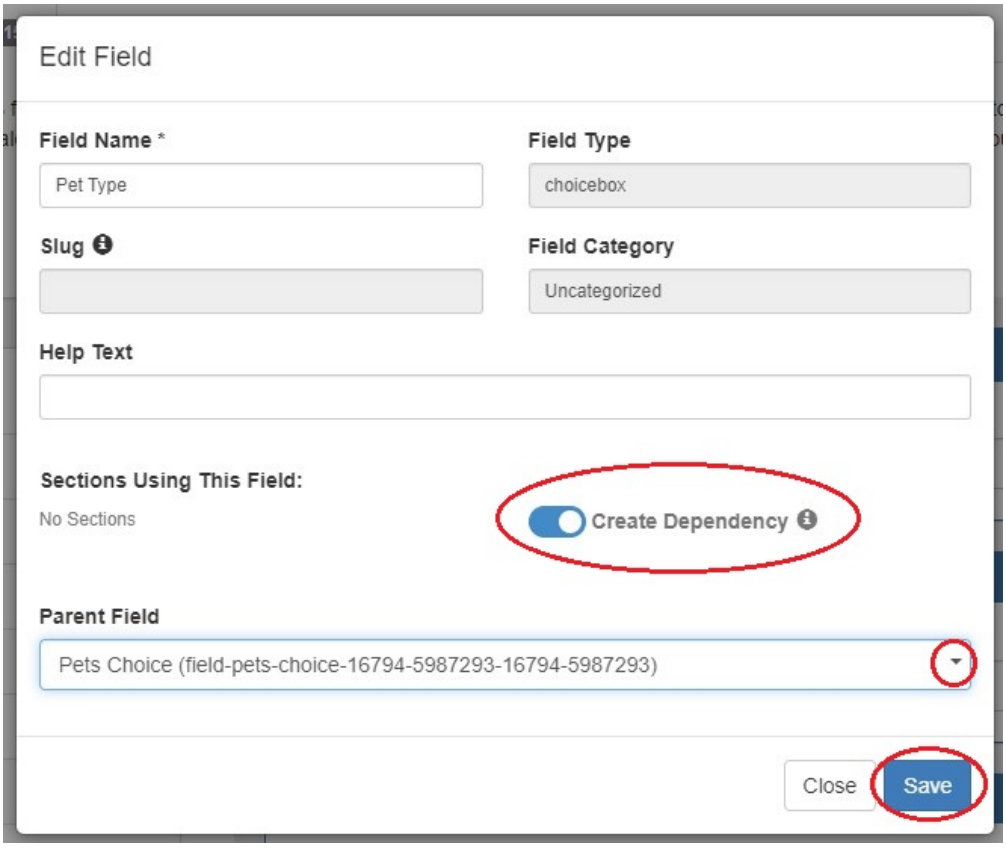
Add a Dependent Field

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.

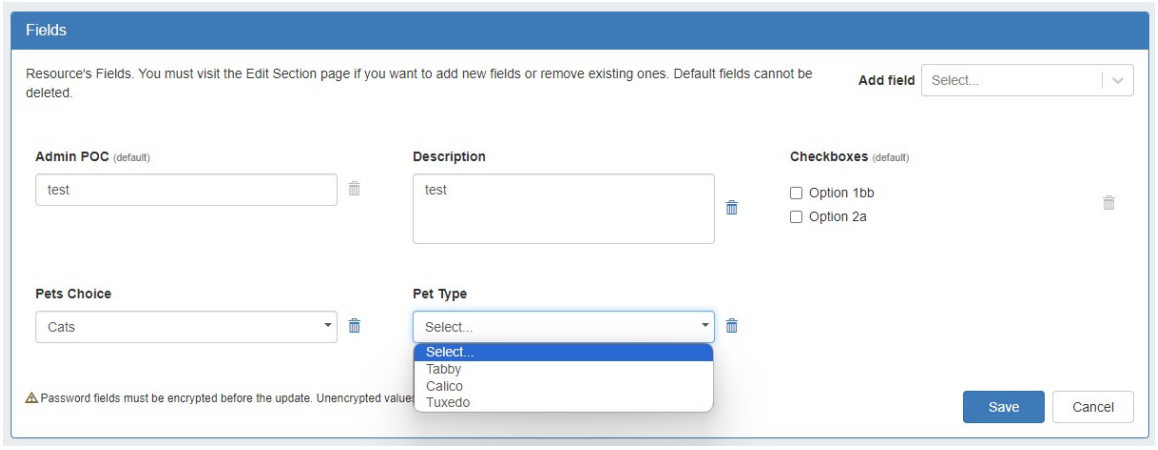
To add a dependent field, you must first set up the field on which it will be dependent. Add a choicebox field from the catalog and open edit. Add options, then add children to the options. Click save. If adding a new custom field, you will need to save from the main "Manage Fields" tab as well.

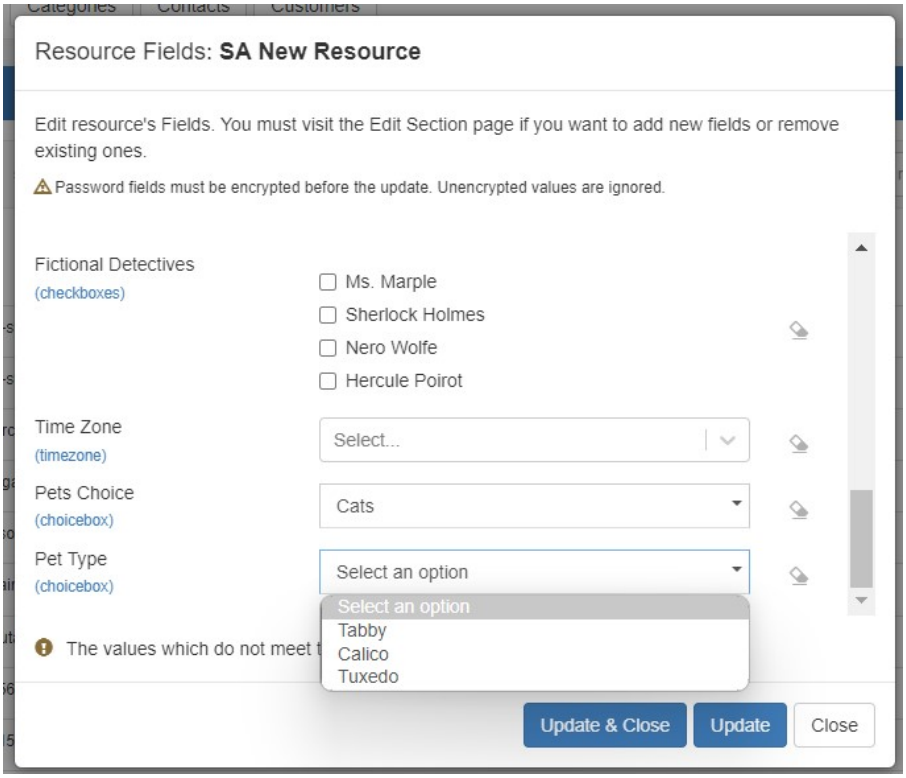


To add the dependent field, add another choicebox field. Open edit and enable the "Create Dependency" selector. Choose a Parent Field from the dropdown and click save. Remember to click save again before exiting the tab.



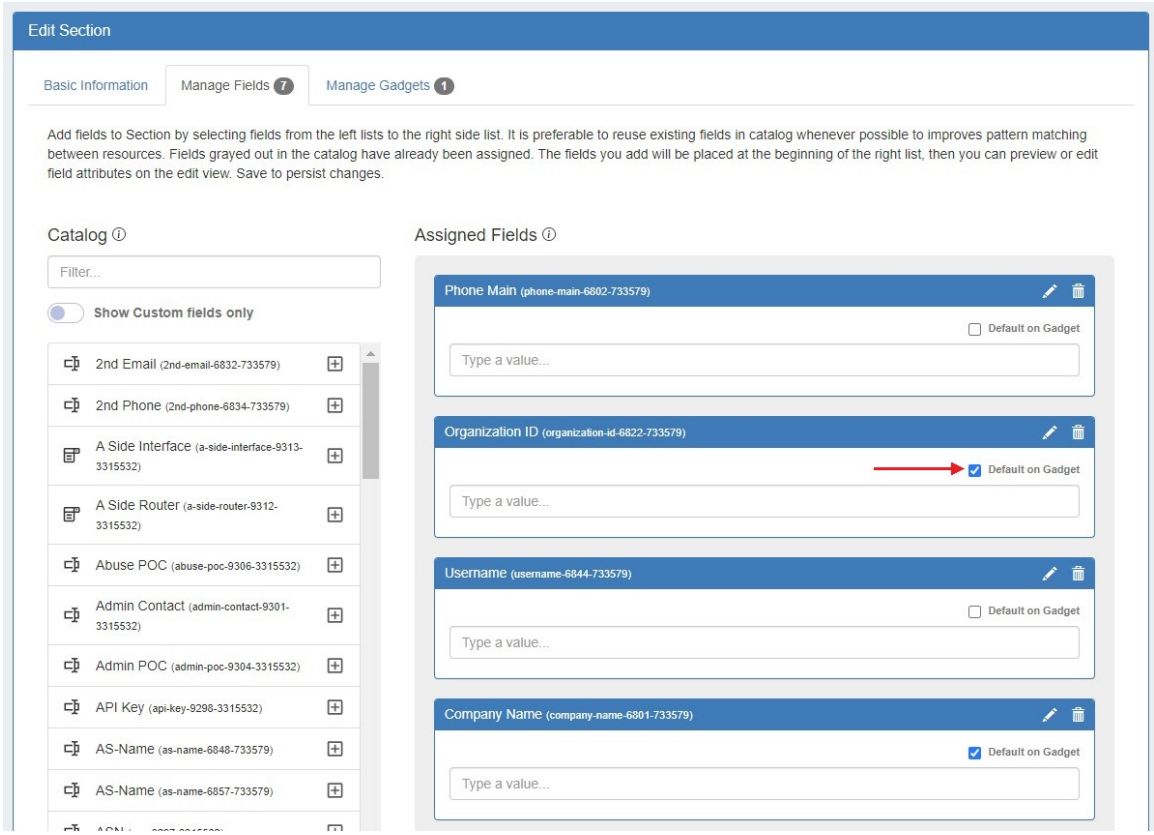
Once the fields are added to the section, they are available in the Fields Gadget and Edit Fields modal.



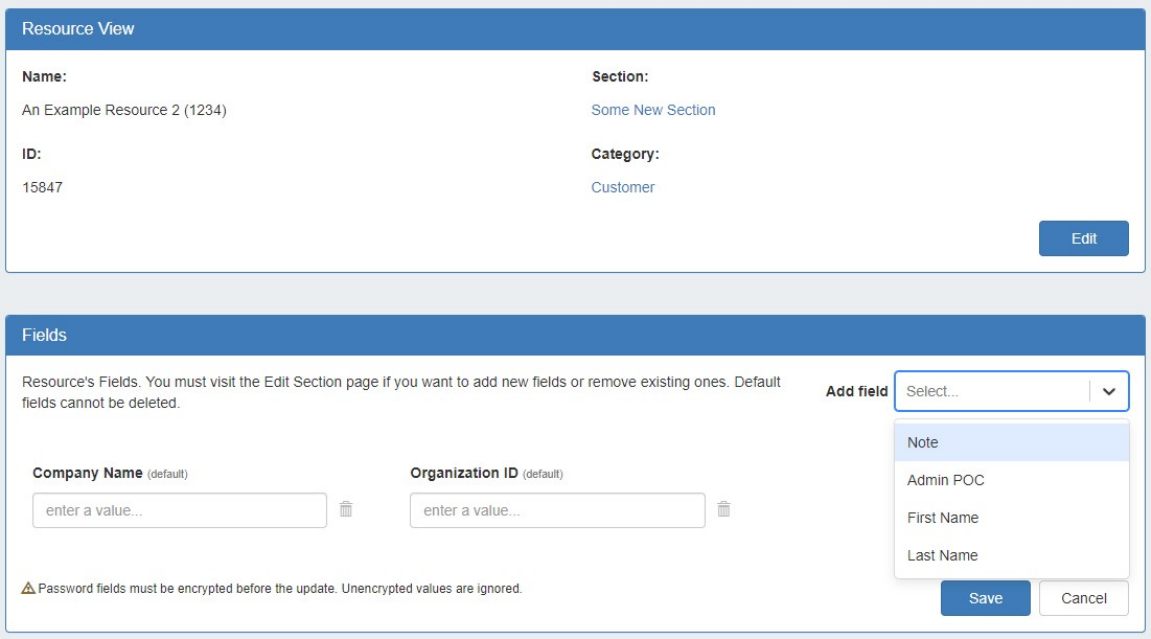


Designate Default Fields

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".



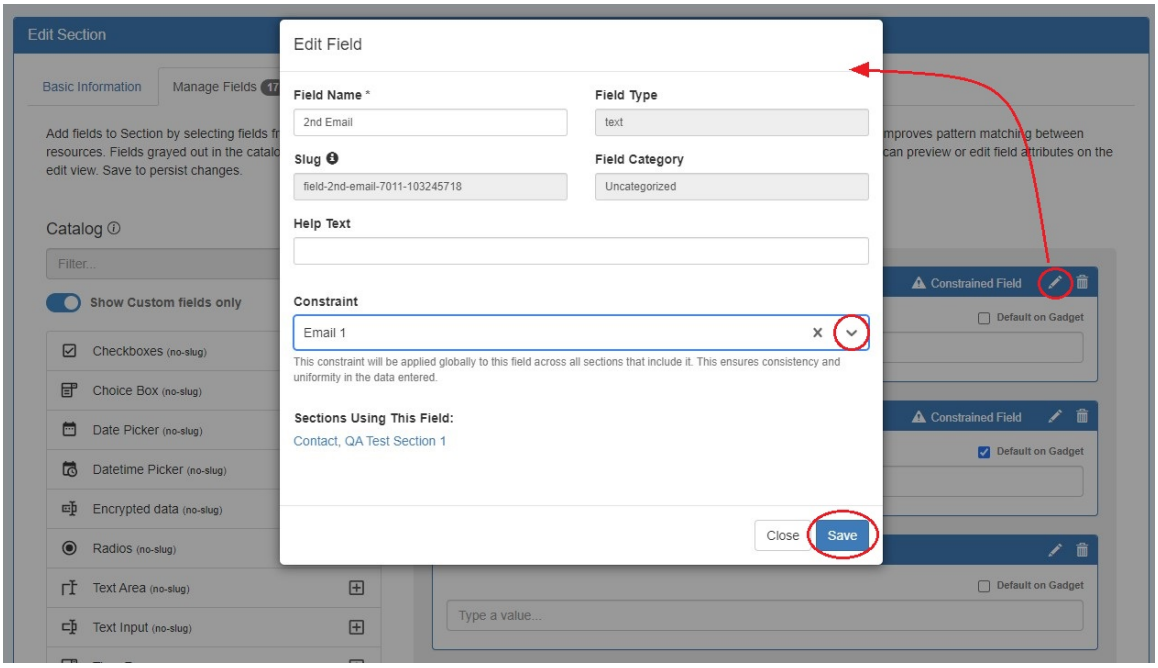
Default fields cannot be removed from the Field Gadget. Non-default fields will be available to add to the gadget on a per resource basis via the dropdown. See Working with the Field Gadget for more information.



Apply a Constraint to a Field

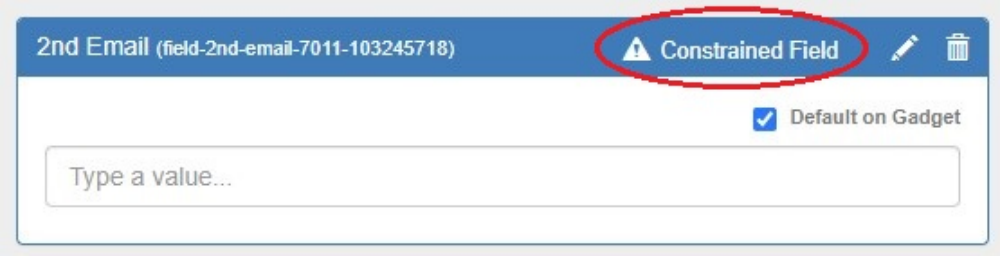
The Constraints system allows Admin users to configure custom field validation and limitations into Resource fields. Many constraint types are available to create in the Admin section. For more details on creating constraints see the Constraints section in the Admin Guide.

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



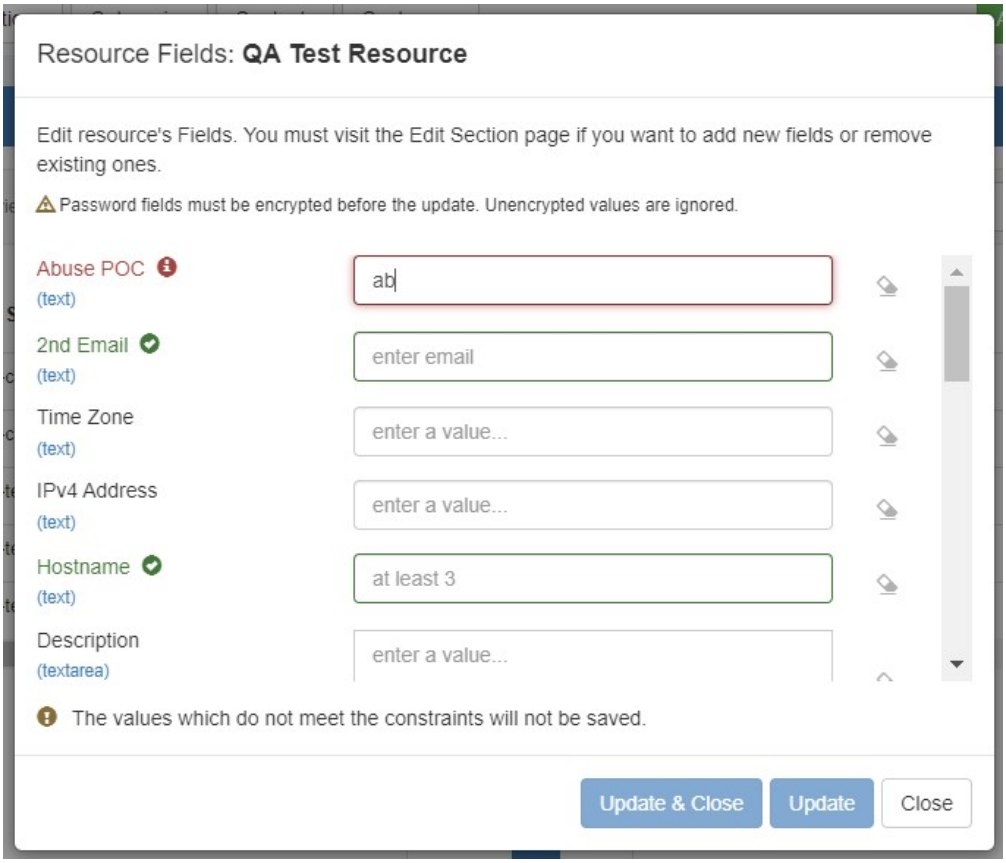
> Applying a constraint to a field affects all sections to which a field is assigned. In the above example, adding a constraint to a field in QA Test Section 1 will also apply the constraint to the field in the Contact Section. You can see which sections are using the field displayed in the Edit Field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

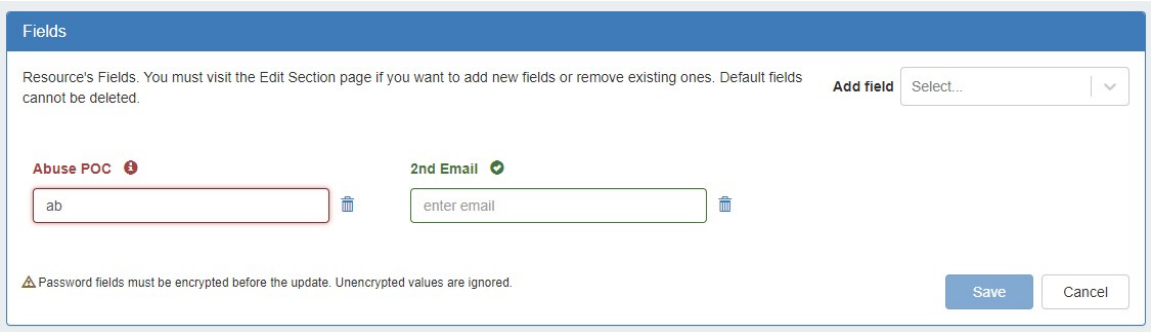
Once a constraint is applied to a field, it will be visible to the user.



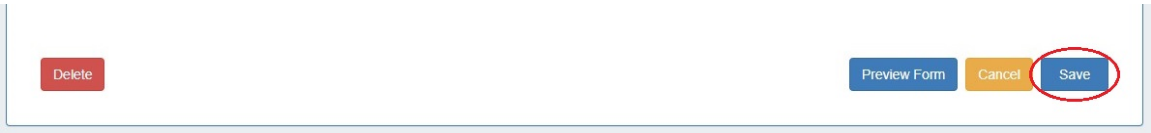
A constrained field is available to edit from the Resource List Edit Fields modal and the Resource's Fields Gadget.

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.



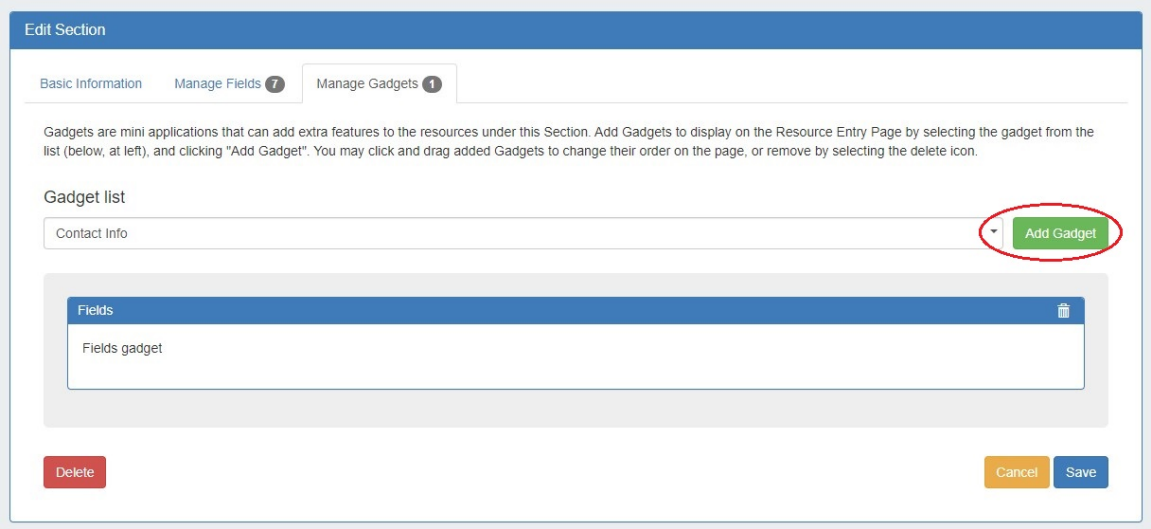


Remember to click "Save" at bottom right after you make any changes.

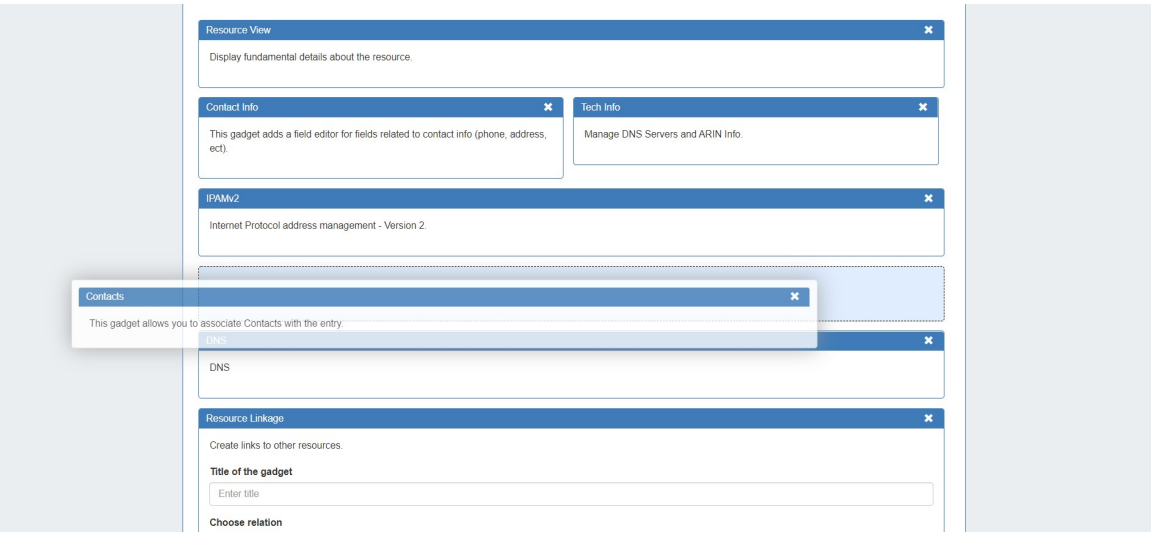


Add Gadgets to a Section

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".



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.



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 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