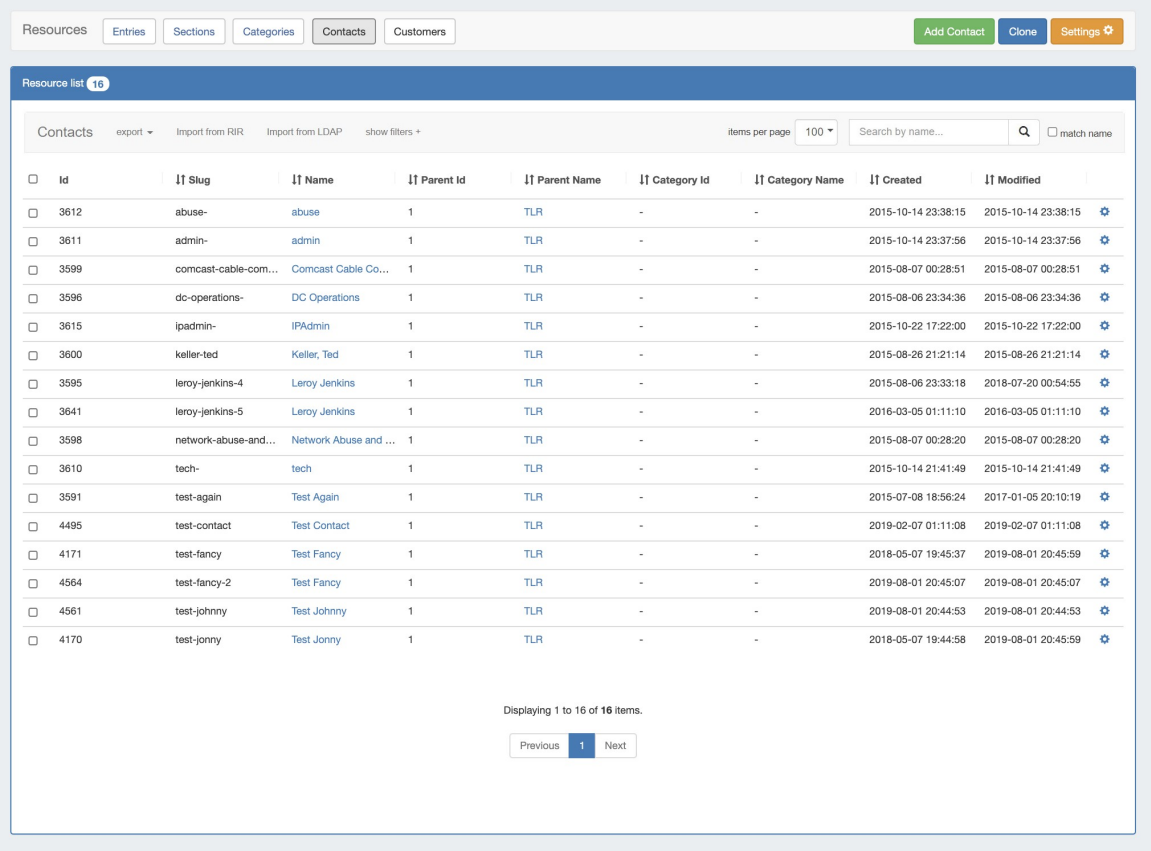
Contact Manager

Contacts

View the Contacts List by clicking "Contacts" from the **Resource** Tab, or from the Resource Tab dropdown menu, under "Contacts". The Contacts List displays existing contacts and provides options to import new contacts. You can create new contacts manually, or import contacts from RIR. Contacts may then be assigned to resources through the Contacts Gadget.



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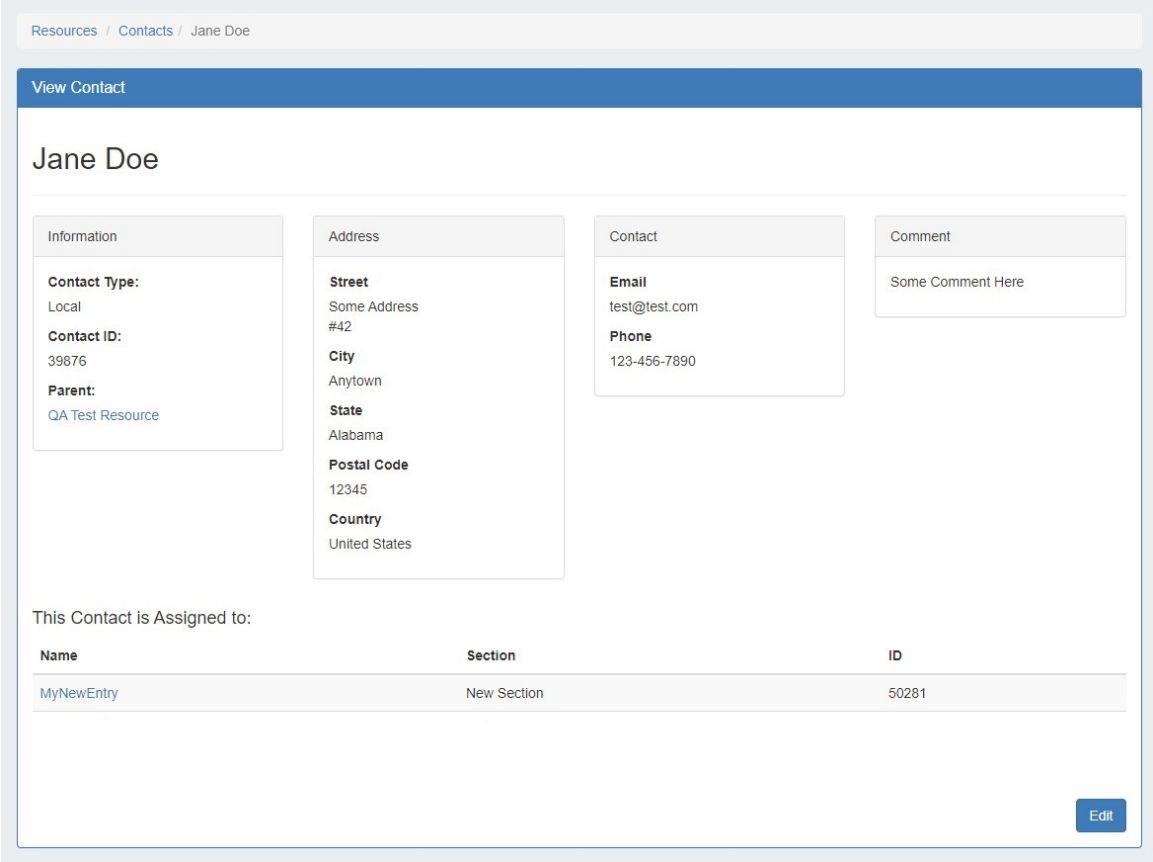
Working with Contacts

View Contact Details

To view the contact details, click on the contact's name in the Resource Contact List. You will be taken to the contact details page.

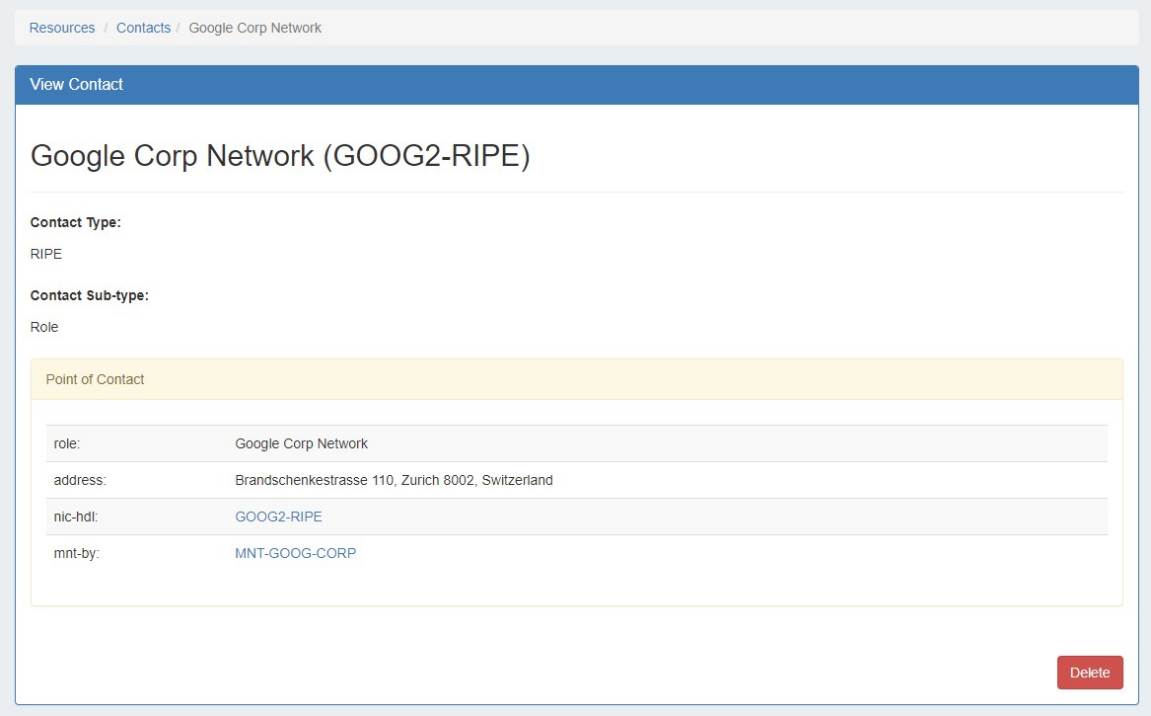
A local contact will have modules shown for Address, Email/Phone, and Comments, as well as a list of any resources that contact is assigned to via the Contacts Gadget.

You may edit or delete a Local contact by clicking the "Edit" button at the bottom of the page.



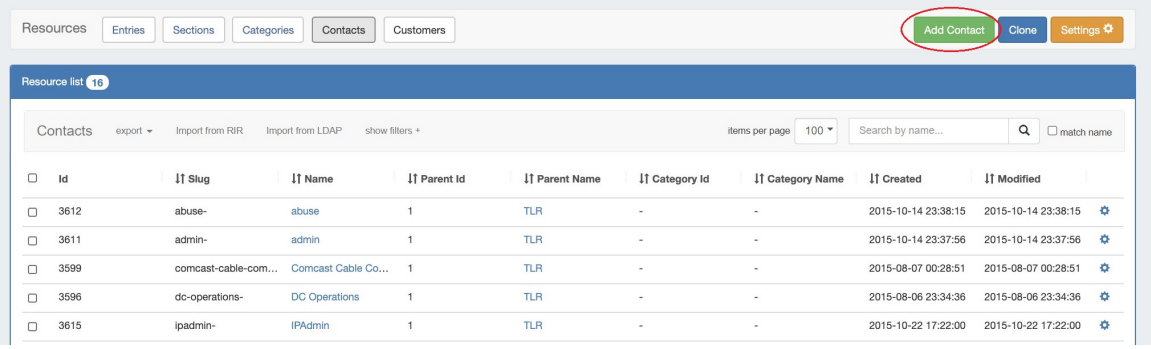
A contact imported from a RIR will have its details shown as determined by the imported RIR module - this data is not editable in ProVision.

You may delete the contact by clicking the "Delete" button at the bottom of the page.

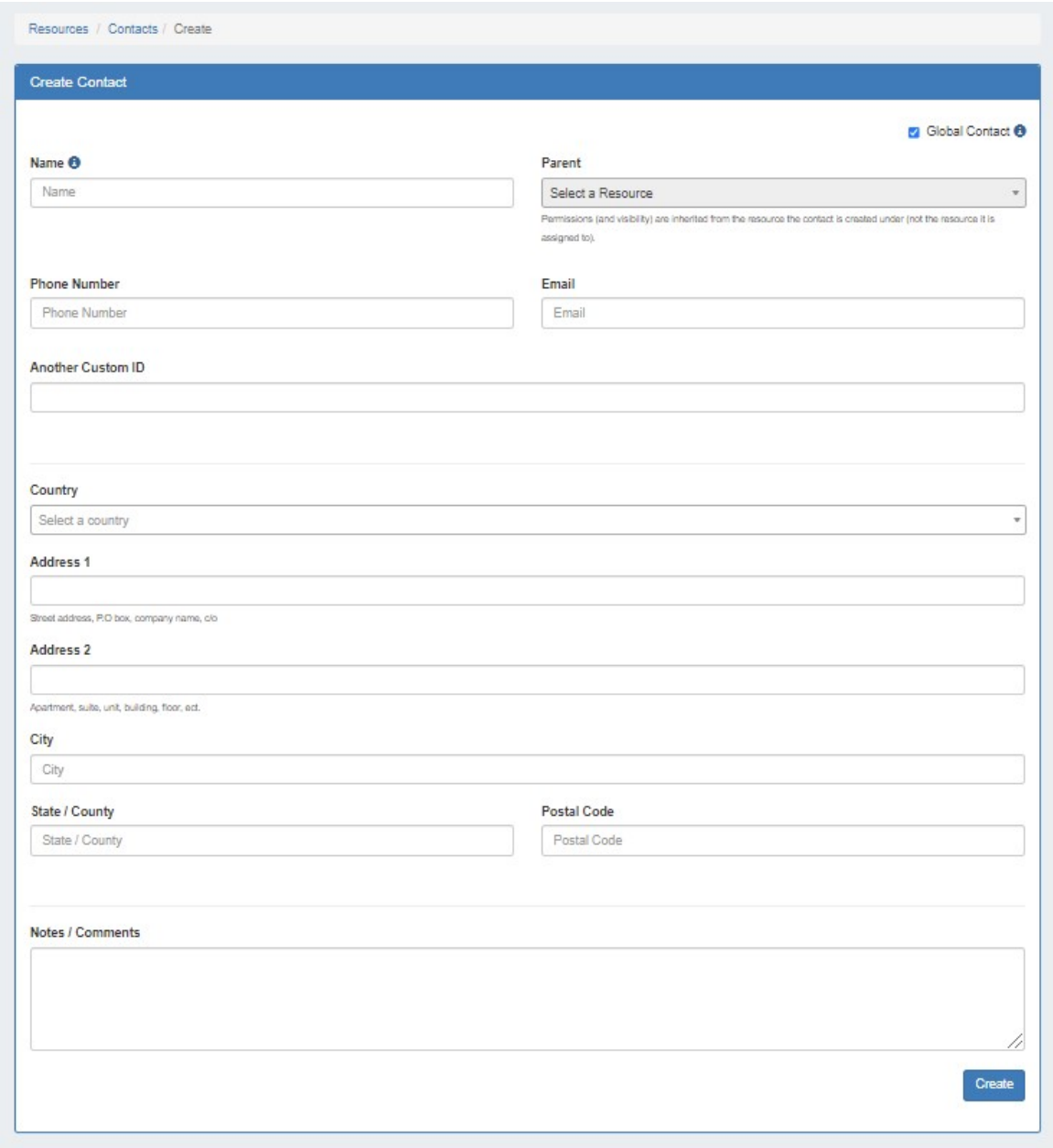


Create New Contact

You can manually create a new contact by clicking on "Add Contact" from the Contacts List View.



Fill in the contact's information for Name, Parent Resource (if desired), Phone, Custom ID, Email, Address, and Comments if desired.

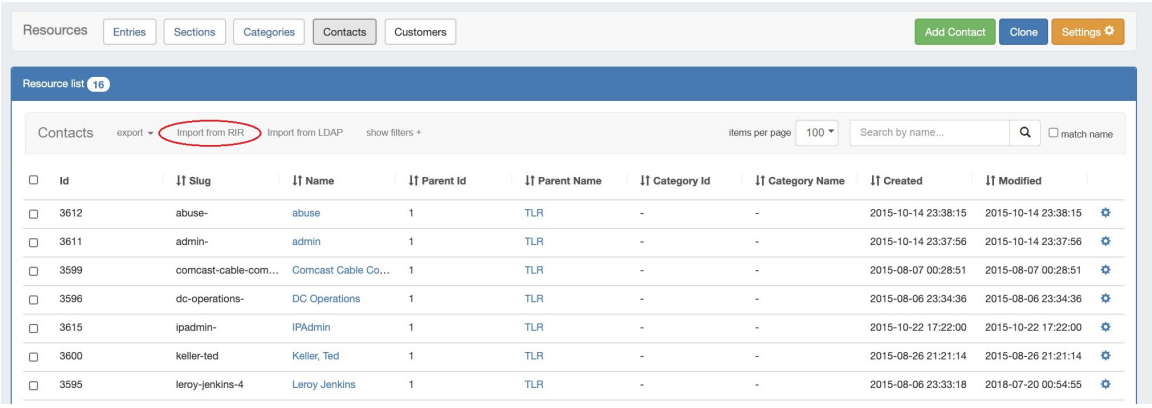


When done filling out the information fields, hit the "Create" button to save your contact.

> **Parent**
>
> The parent field relates the contact to a resource's permissions structure, only allowing users with permissions for that resource to view and assign the affiliated contact(s). To allow the contact to be viewed globally, check the "Global Contact" box above the Parent Field.

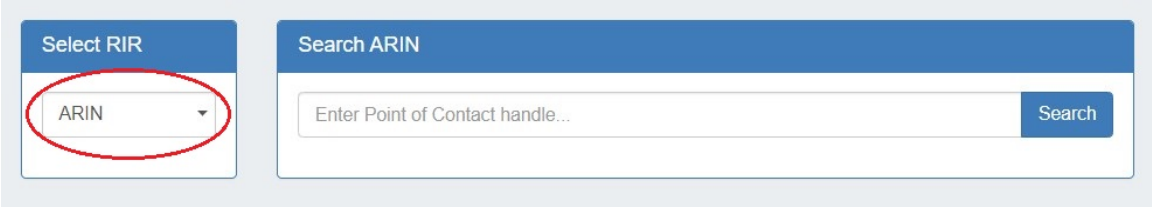
Import Contact from RIR

To import a contact from ARIN or RIPE, click the "Import from RIR" button from the contacts page.

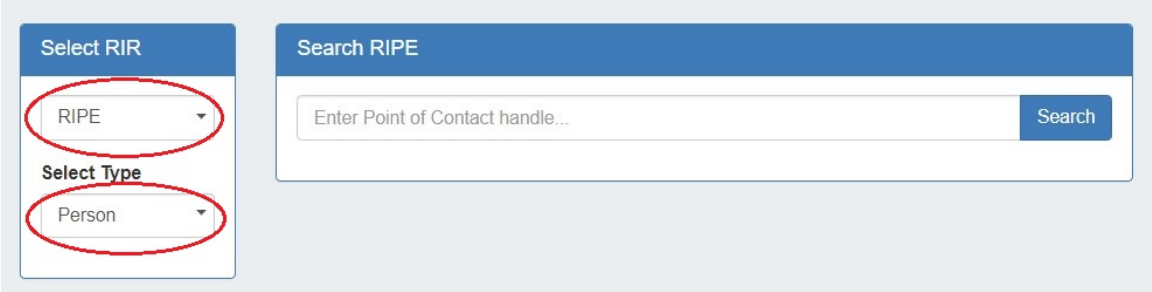


1) Select RIR / Type

Once on the the Import from RIR page, on the left hand side of the page select the RIR from which you wish to import - ARIN or RIPE.



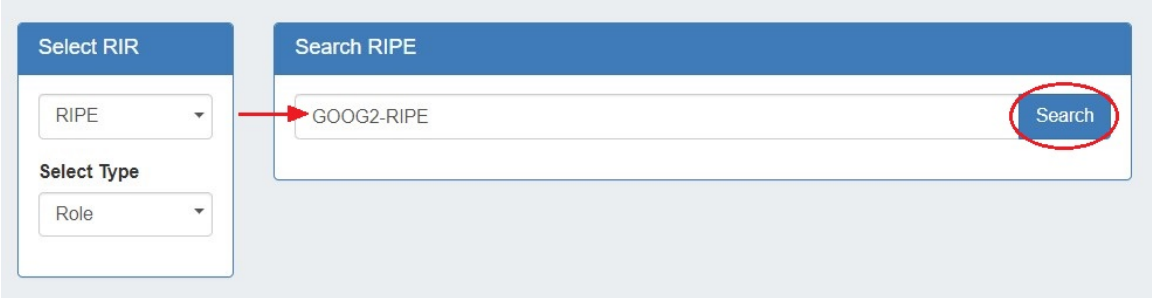
If you select RIPE, you will also be prompted to choose whether you are importing a "Person" or "Role".



2) Enter Point of Contact Handle

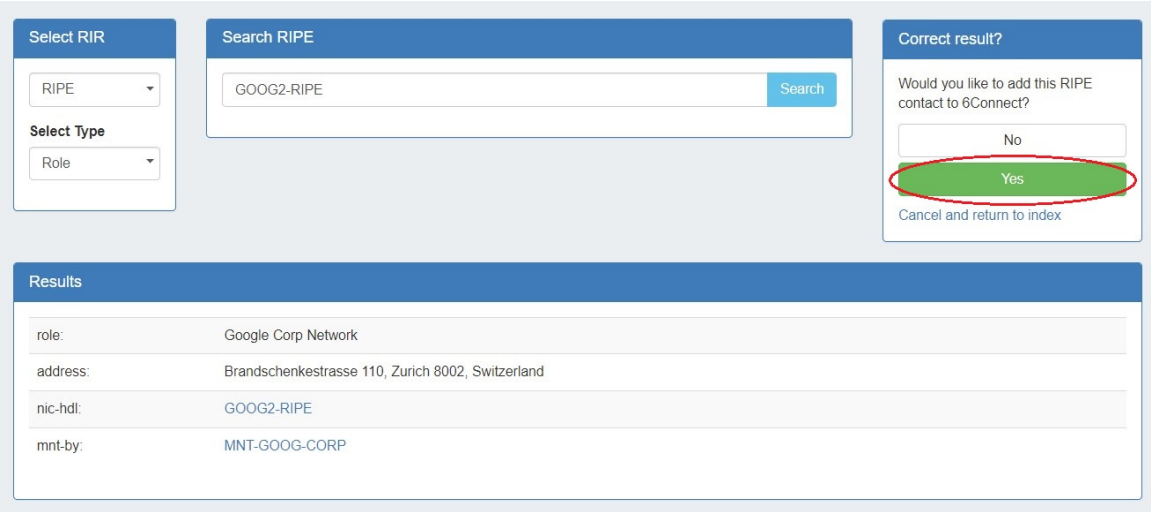
After selecting the RIR / Type (if applicable), enter the ARIN or RIPE Point of Contact Handle for the contact you are importing, then click "Search".

> Point of Contact Handle is the only search term that is valid. Attempting to search by name or keyword is not valid, and will return an error.



3) Verify and Add

If the search is successful, the found contact information will display at the bottom of the screen. If this is the information you wish to add, click the "Yes" button on the right hand side of the page under "Would you like to add this RIPE contact?". Otherwise, you may hit "No" to decline adding, or cancel and return to the index.

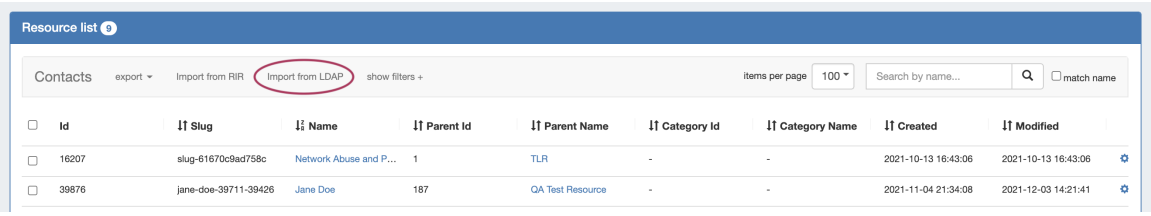


Import Contact from LDAP

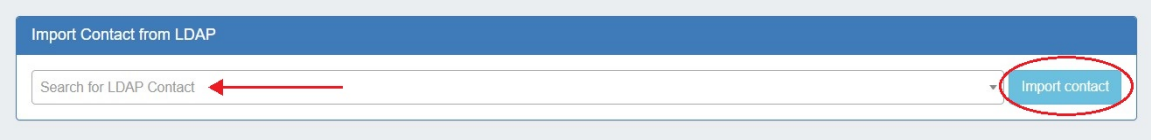
> Import LDAP Contact requires that an LDAP authentication server is enabled and setup in Admin Settings, and access credentials to be provided prior to import.

First, ensure that the LDAP authentication server is enabled and setup in Admin Settings, and access credentials provided.

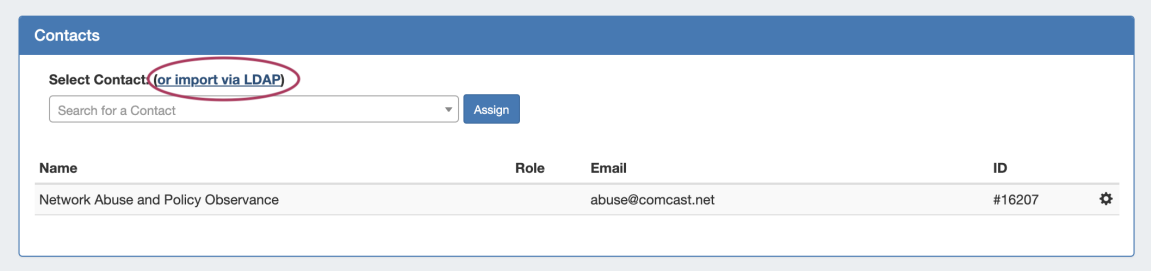
Then, from the Resource Tab Contacts List, click the "Import from LDAP" button at the top of the list.



Use the search box to find an LDAP contact and click the "Import Contact" button.



You may also access LDAP Import from the Contacts Gadget, if preferred.

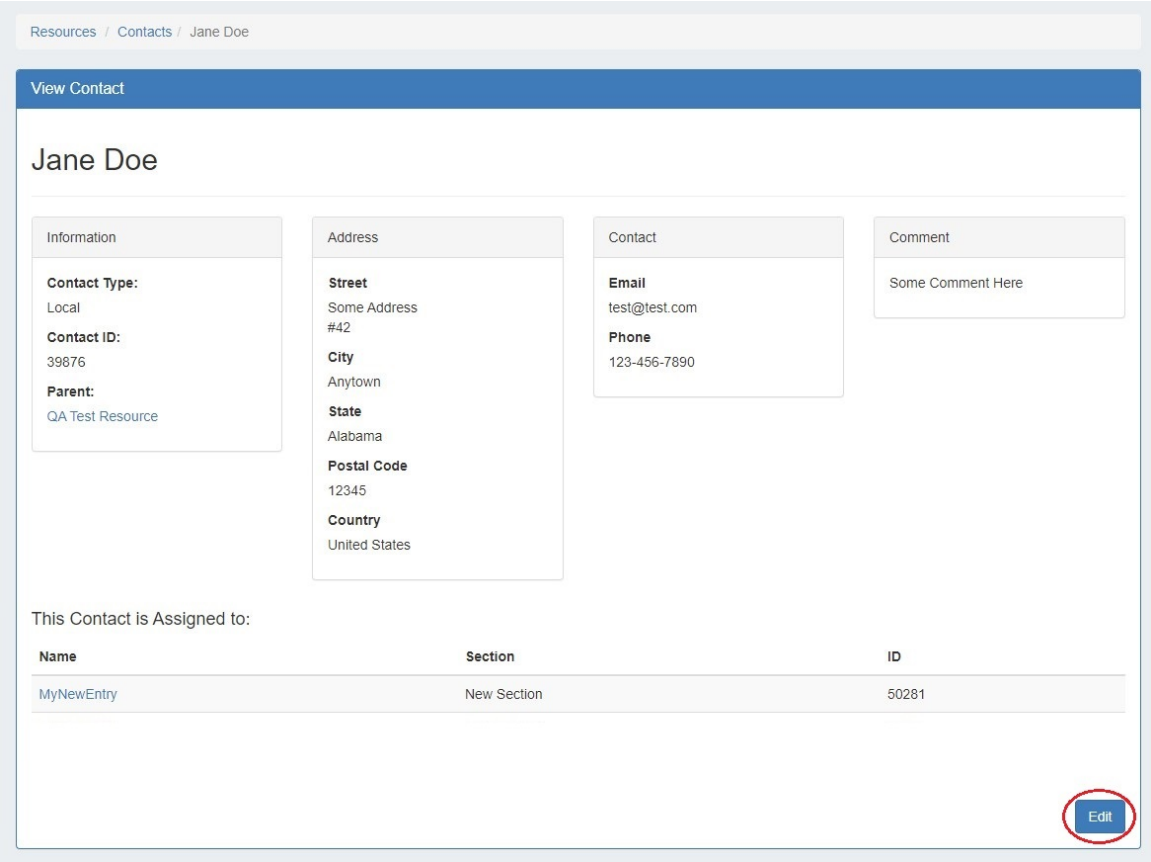


Once imported, the LDAP contact will be available to add to the Contacts Gadget and will show in the Users List.

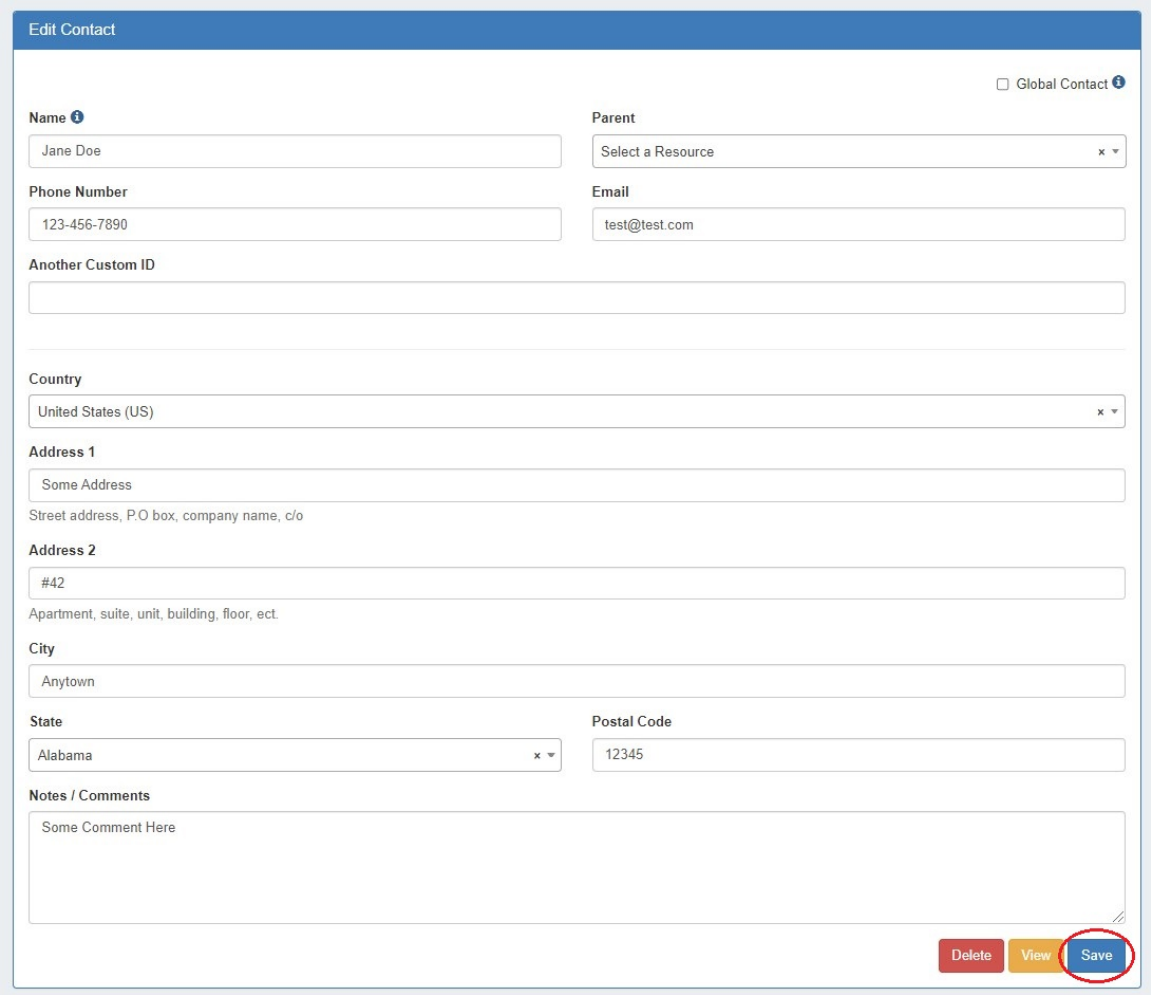
> Note: The Scheduler task "LDAP - Sync LDAP Contacts" must be manually created at the desired interval in order to automatically update the LDAP user based on the server information. This task updates imported LDAP users with any changes made on the LDAP server.

Edit or Delete Contact

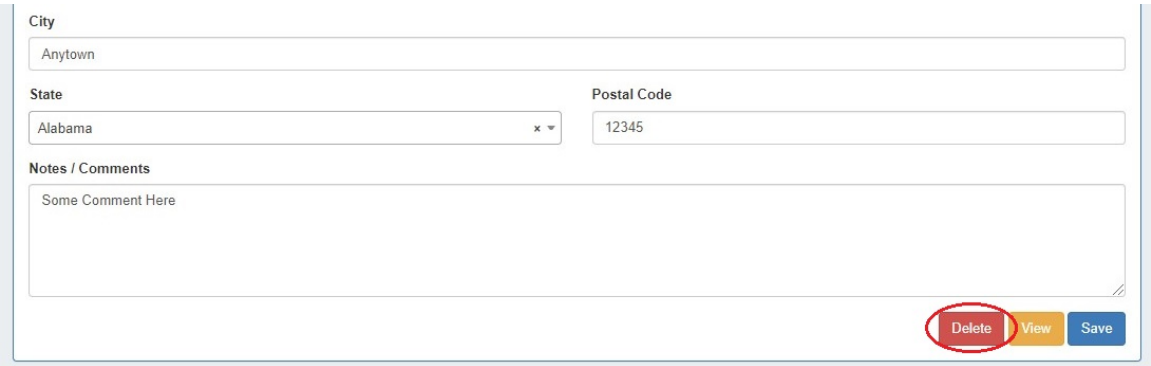
To Edit or Delete a base contact, click on the contact's name in the contact list to go to its detail view page. From there, click "Edit".



This will take you to the detail information page, where you may edit fields as desired. When done editing, hit "Save" to save your changes, or "View" to cancel without saving and view the contacts list.



To delete the contact, click the "Delete" button while in the contact details page.



Working with the Contacts Gadget

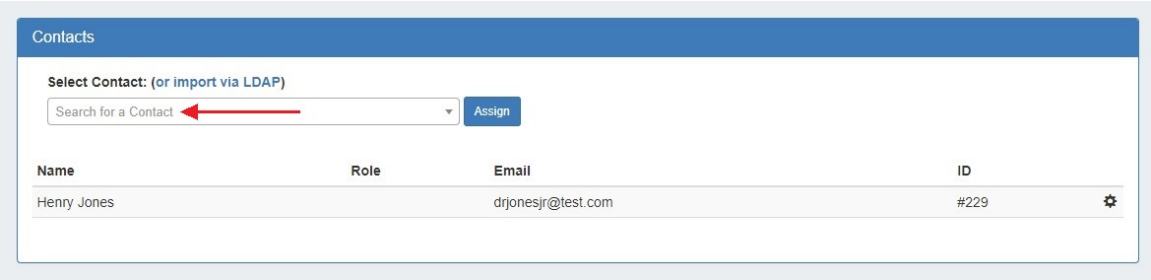
Assigning a Contact to a Resource

Contacts may be assigned to a resource through the Contacts Gadget. To add a gadget to a Resource's Entry page, see Customizing Sections and Gadgets.

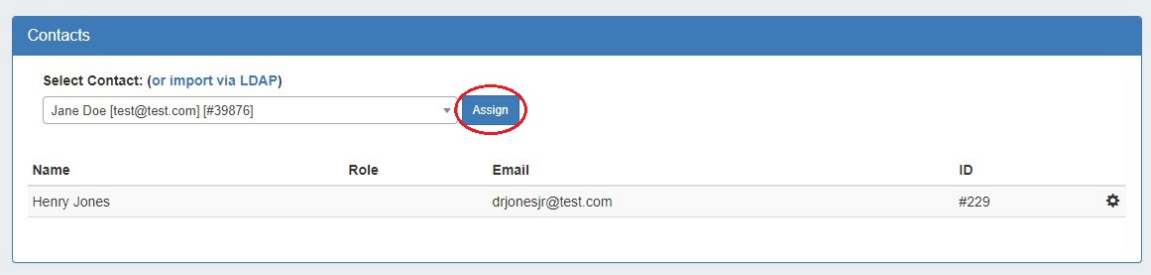
Once the Contacts Gadget has been added to the desired section, go to the resource entry page for the resource you wish to assign the contact to, and navigate to the Contacts Gadget.

Assign the Contact

In the Contacts Gadget, search for a contact by typing the first few letters of the contact name in the search box, then click on the desired contact.

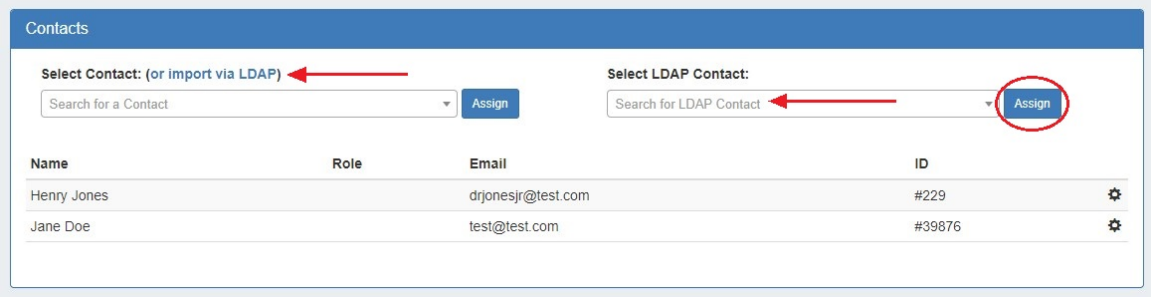


Then hit "Assign".



The contact will show in the list below.

You can also import and assign a contact via LDAP from the Contacts Gadget. Click on "import via LDAP" and a separate search box will appear. Search for an LDAP contact and hit "Assign".

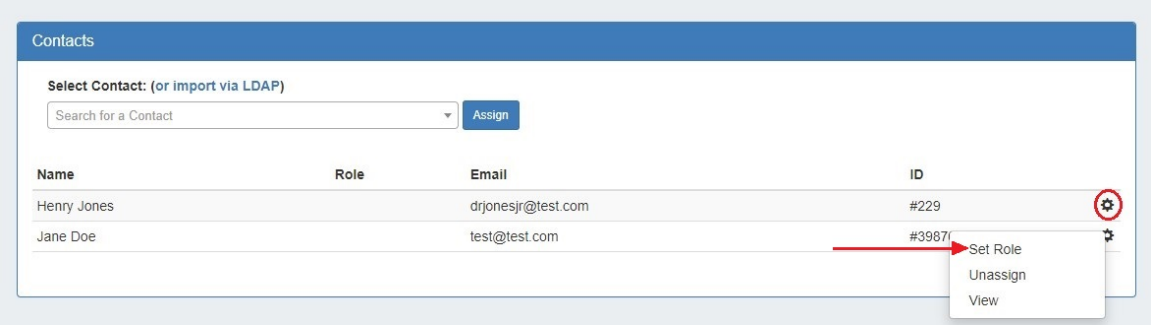


The contact will be imported and assigned to the resource. If a contact has already been imported, a notification will appear and the gadget will assign the contact to the resource, but the contact will not be imported again.

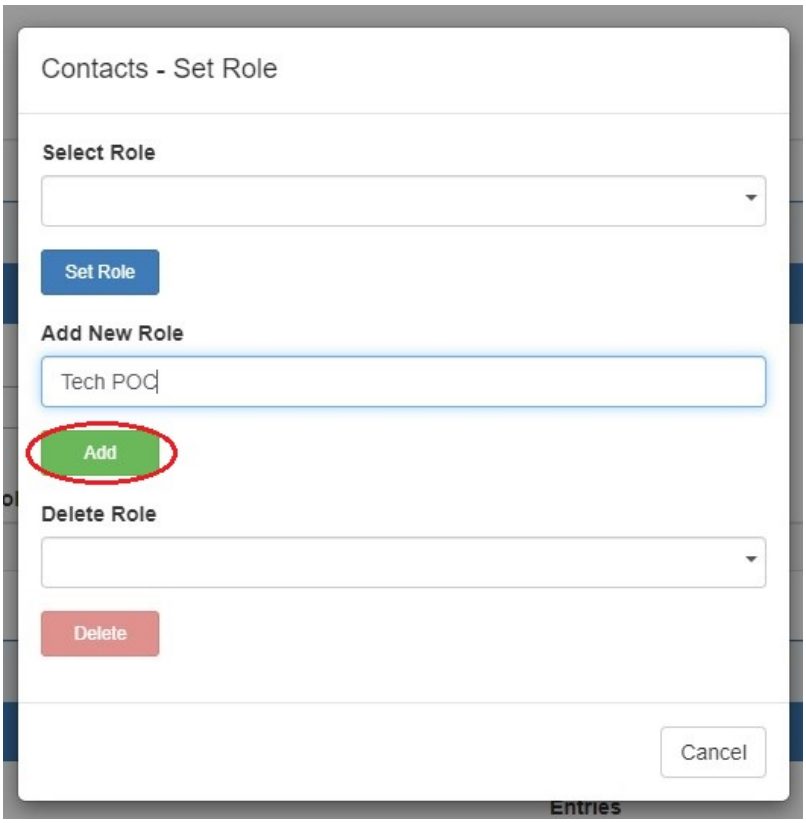
Create a Contact Role

Once a contact has been assigned, you can create and set a role for the contact by clicking on the Action Menu (gear icon).

Then, select "Set Role".



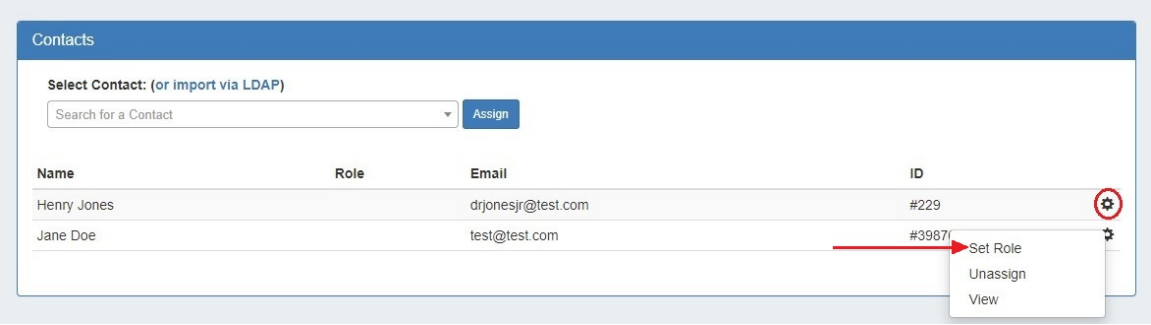
Under the "Add New Role" section, type in the desired tole name and click the "Add" button.



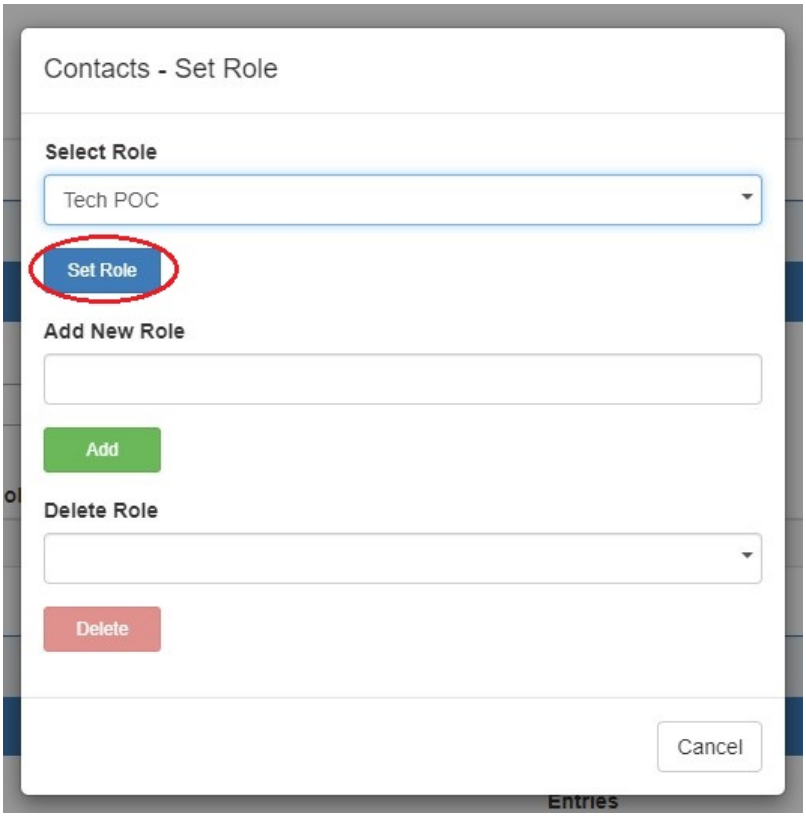
Assign a Role to a Contact

Once a contact has been assigned, you can set a role for the contact by clicking on the Action Menu (gear icon).

Then, select "Set Role".

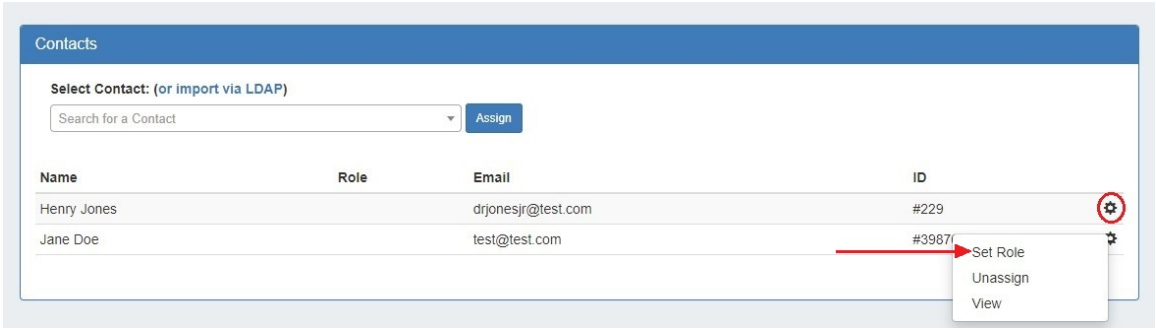


Under the "Select Role" section, choose the desired role from the dropdown list, and click the "Set Role" button.

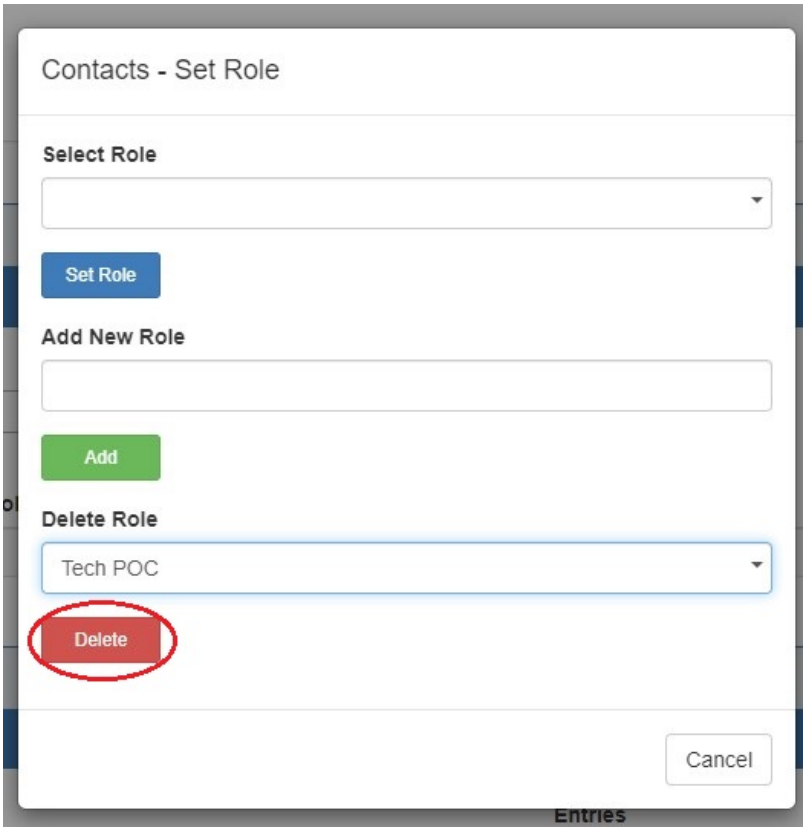


Delete a Role from the Roles List

Select "Set Role"



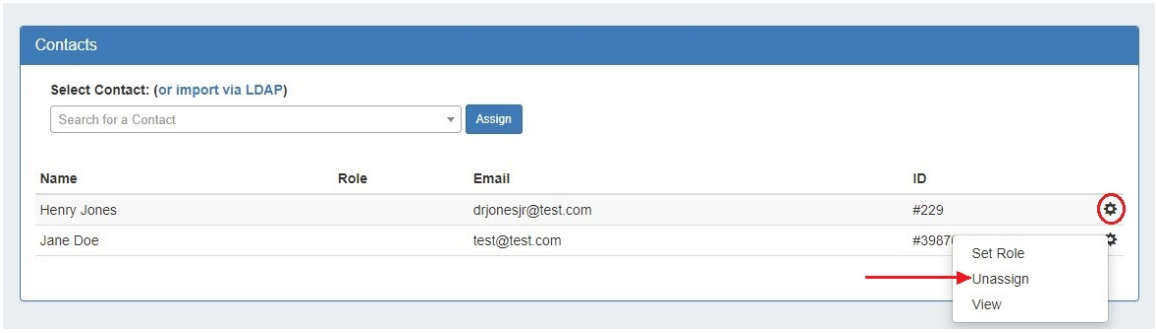
Under the "Delete Role" section, choose the desired role from the dropdown list, and click the "Delete" button.



This removes the role from the "Select Role" list.

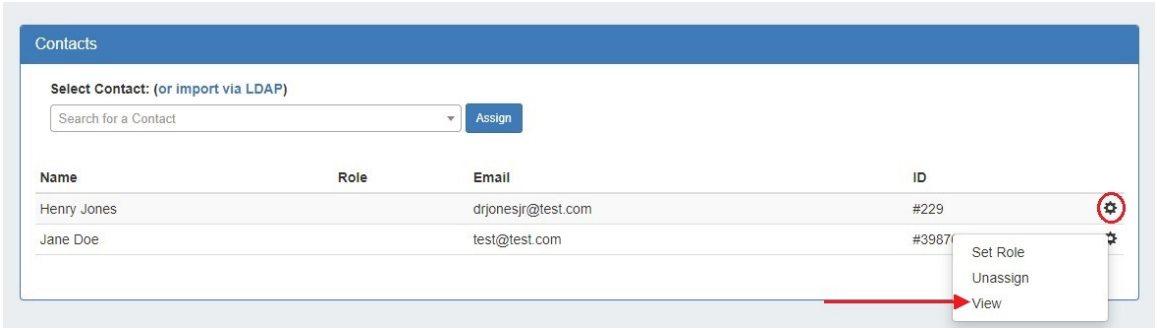
Unassign a Contact

To unassign a contact from a resource, in the Contacts Gadget click the Action Menu, then select "Unassign".



View the Contact Details Page

To view the contact's details, click the Action Menu, then select "View". You will be redirected to the contact's detail page.


Contacts
Select Contact: (or import via LDAP)
Search for a Contact
Assign
Name
Role
Email
ID
Henry Jones
drjonesjr@test.com
#229
Jane Doe
test@test.com
Set Role
Unassign
View