

Customizing Fields

Working with Fields

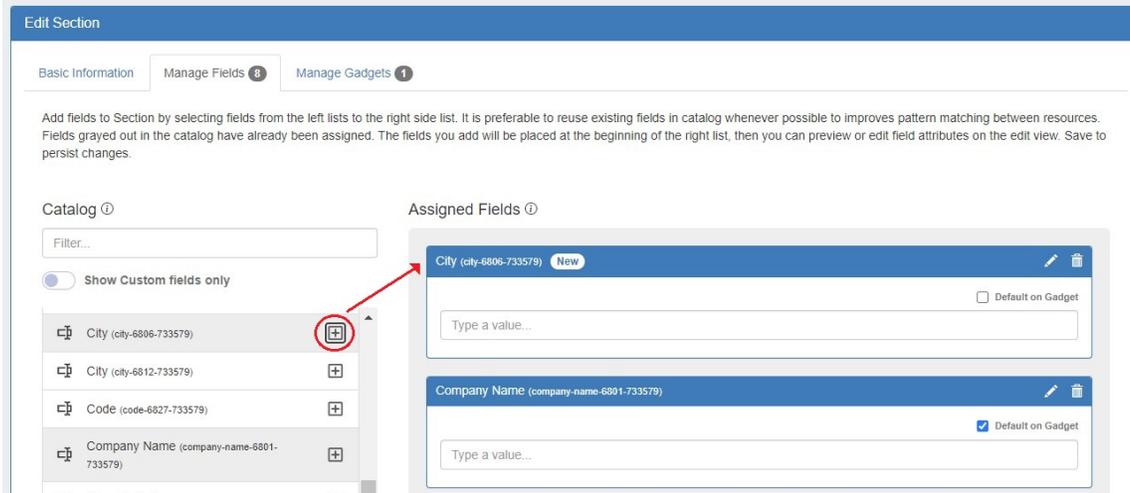
Fields are individual pieces of data that you can associate with a particular section. For example, you may want to have "Operating System", "Make", and "Model" fields for a server or device. There are many default fields to choose from, but you may also create custom fields and edit fields to suit your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

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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-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 ⓘ

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

Type a value...

Model (model-6839-733579) Default on Gadget

7600 Series

Add New Custom Field to a Section

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

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 Default on Gadget

Type a value...

2nd Email (field-2nd-email-7011-103245718) Constrained Field Default on Gadget

Type a value...

Time Zone (field-time-zone-7023-103245718) Default on Gadget

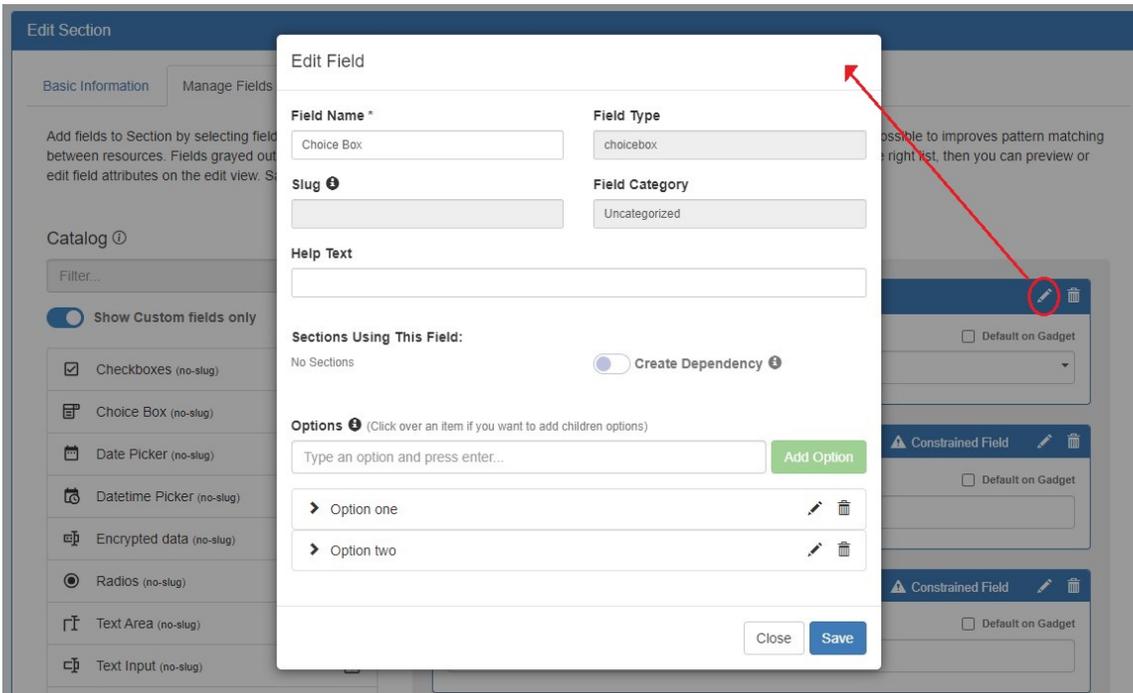
Type a value...

IPv4 Address (field-ipv4-address-7035-103245718) Default on Gadget

Type a value...

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.

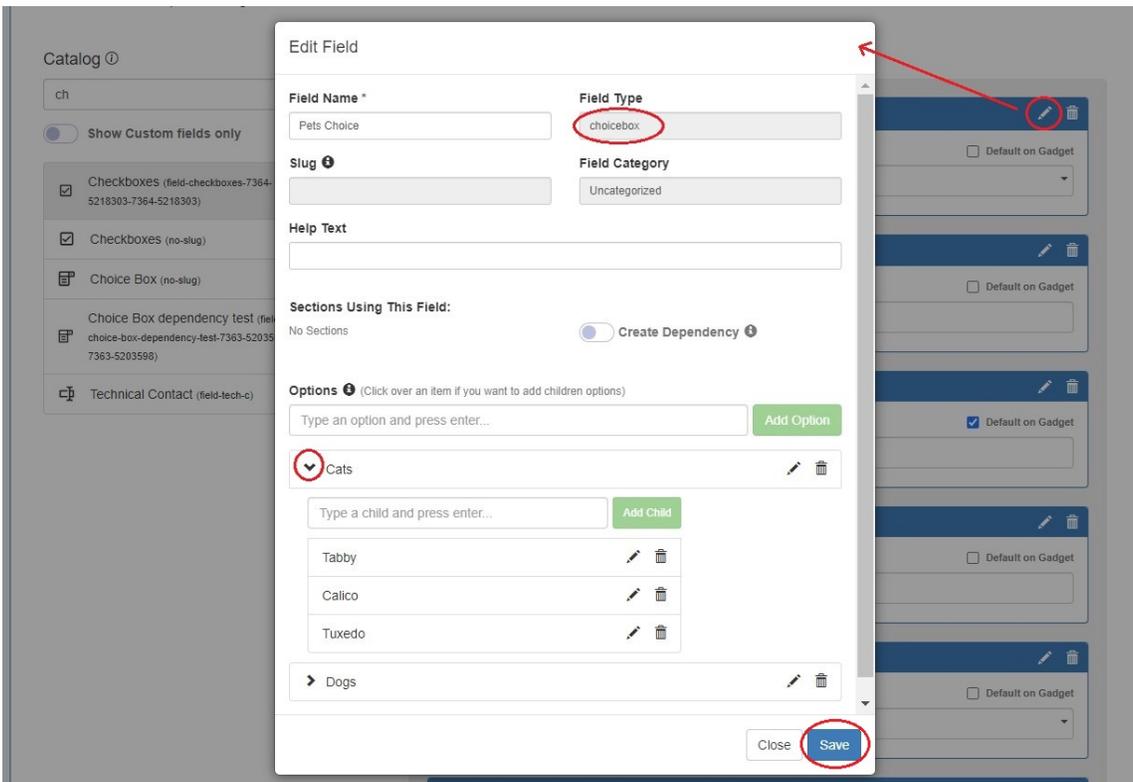


To remove a field, click the delete (trash can) icon on the blue header for the assigned field. This will remove the field from the "Assigned Fields" column, but the field will still exist for repeat use in the field catalog.

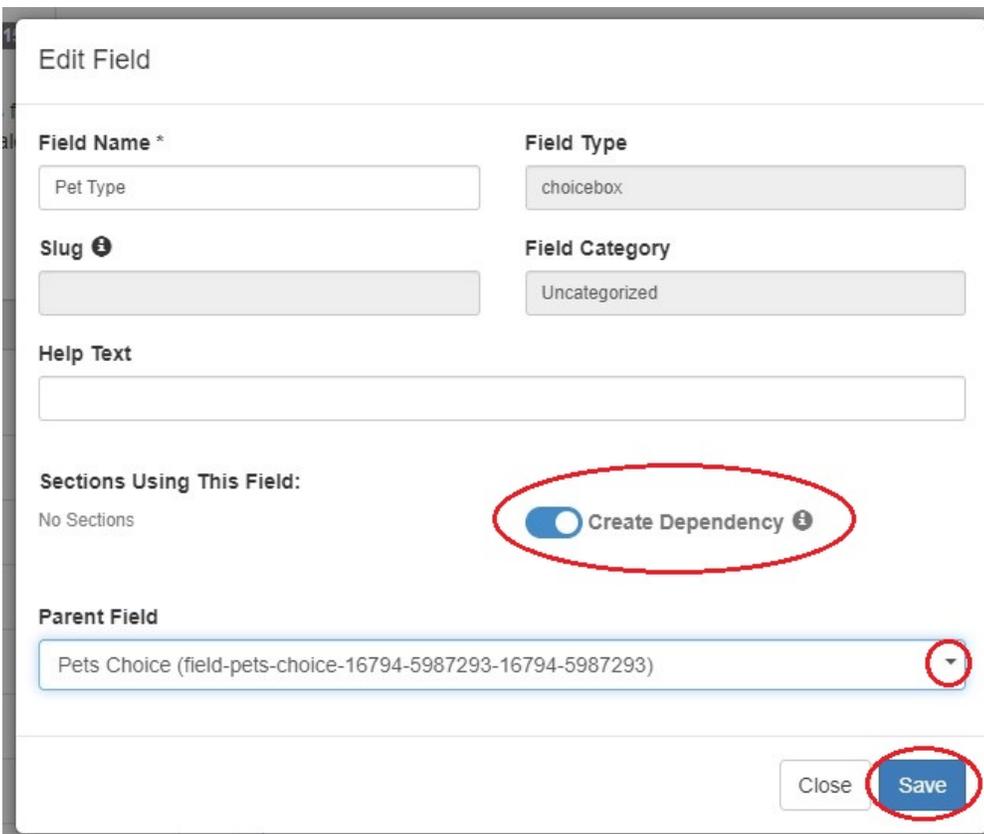
Adding Dependent Fields

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 or edit options, then add children to the options. Click save. If adding a new custom choicebox field, you will need to save from the main "Manage Fields" tab as well before proceeding to the next step.



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.

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

Admin POC (default)

Description

Checkboxes (default)

Option 1bb

Option 2a

Pets Choice

Pet Type

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

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)

Pets Choice (choicebox)

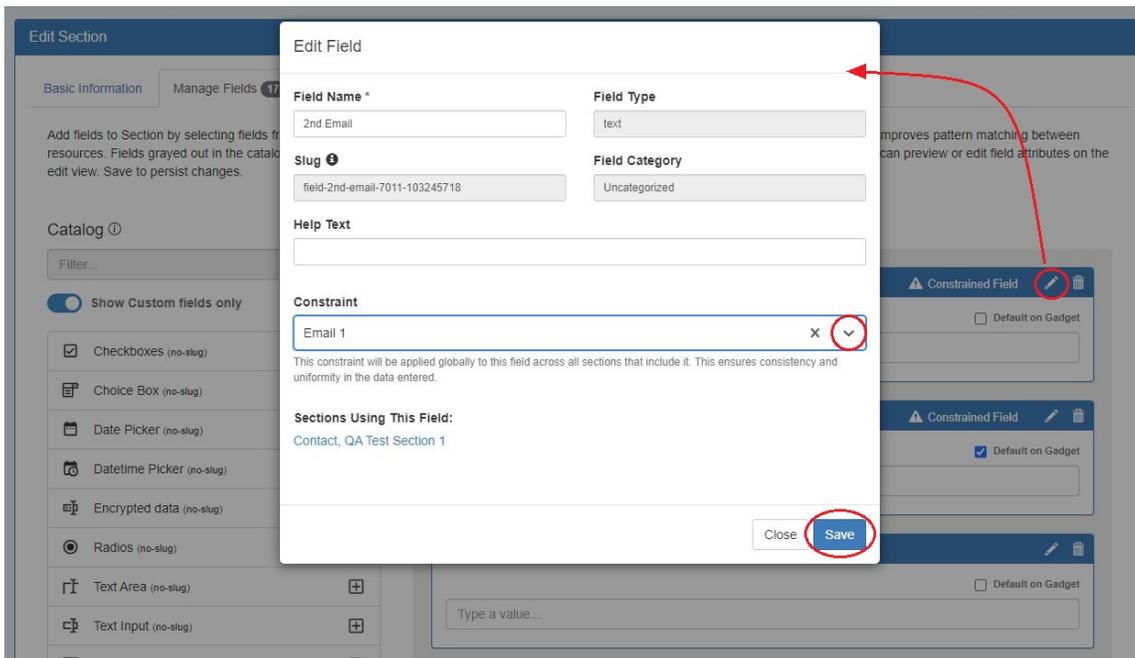
Pet Type (choicebox)

ⓘ The values which do not meet t

Applying Constraints to Fields

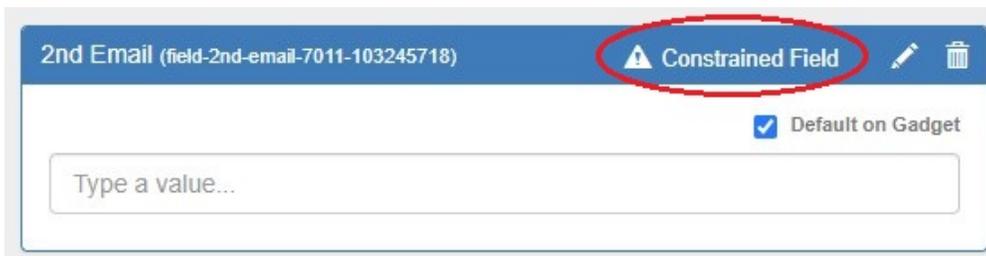
The Constraints system allows Admin users to configure custom field validation and limitations into Resource fields. Many constraint types are available to create in the Admin section. For more details on creating constraints see [Constraints in the Admin Guide](#).

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



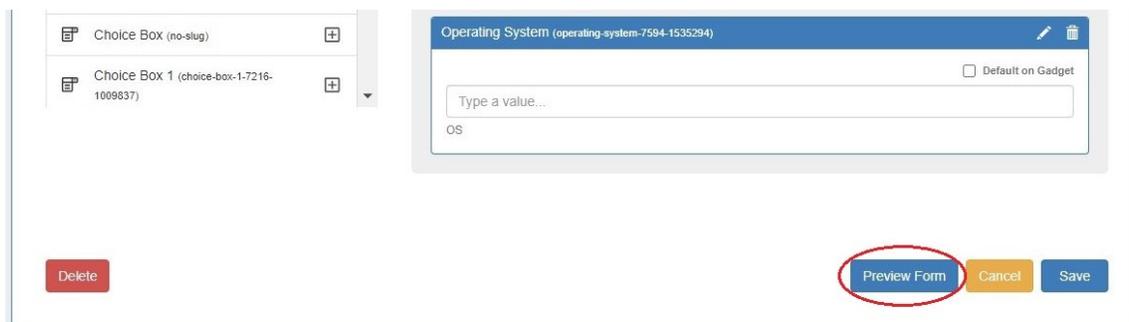
Applying a constraint to a field affects all sections to which a field is assigned. In the above example, adding a constraint to a field in QA Test Section 1 will also apply the constraint to the field in the Contact Section. You can see which sections are using the field displayed in the Edit Field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

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



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 grey border. At the top left, the text 'Type a value...' is partially visible. The dialog contains the following fields:

- Phone Main**: A text input field with the placeholder text 'Type a value...'.
- Organization ID**: A text input field with the placeholder text 'Type a value...'.
- Username**: A text input field with the placeholder text 'Type a value...'.
- Company Name**: A text input field with the placeholder text 'Type a value...'.
- Model**: A dropdown menu with '7600 Series' selected.
- Make**: A dropdown menu with 'Arista' selected.

At the bottom right of the dialog is a 'Close' button. On the left side of the dialog, there is a vertical scrollbar and some faint, partially visible text: '14', '53', '33', '25', '31', '2)', '33', '1', and '7'.

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.

This will keep the selected fields added and visible by default in the Field gadget.

Deselecting default on gadget will remove any empty fields (Note: spaces / non-visible characters do count as values!), and require manual selection of fields to display via the Field 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 ①

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 ①

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...

Delete Fields

Unused (non-system) fields may be permanently deleted from the field catalog. To be eligible for delete, the field must not be use in any sections.

Fields able to be deleted will display with a trash can icon next to them in the field catalog.

Edit Section

Basic Information | **Manage Fields 8** | 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

- 2nd Email (field-2nd-email-7011-103245718)
- 2nd Phone (field-2nd-phone-7017-103245718)
- A Side Interface (field-a-side-interface) Remove field permanently
- A Side Router (field-a-side-router)
- Abuse POC (field-abuse-poc)

Assigned Fields ①

Company Name (field-company-name-6918-103245718) Default on Gadget

Type a value...

Organization ID (field-organization-id-8981-103245718) Default on Gadget

Type a value...

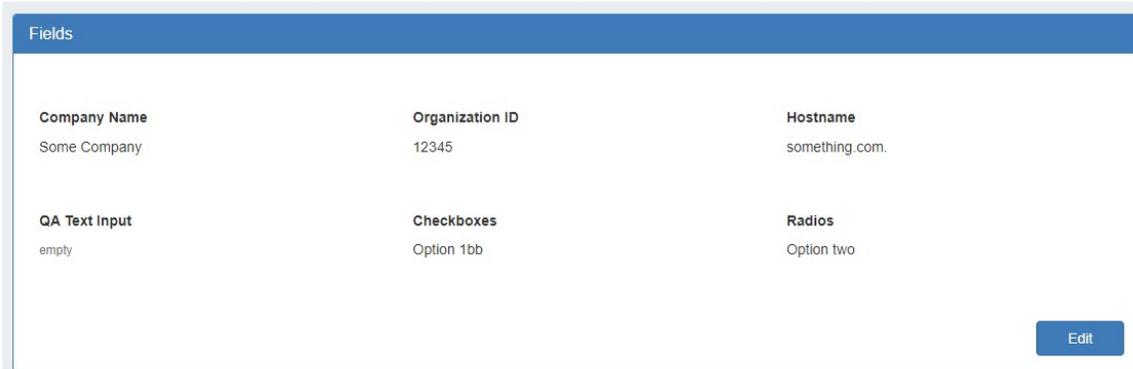
Org POC (field-org-poc-6987-103245718) Default on Gadget

Type a value...

To permanently delete a field, click on the trash can icon for the field in the field catalog. A confirmation dialog will appear to confirm. Once confirmed, the field is deleted permanently and is non-recoverable.

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.



The screenshot shows a 'Fields' gadget with a blue header. Below the header is a table with three columns. The first column contains 'Company Name' with the value 'Some Company'. The second column contains 'Organization ID' with the value '12345'. The third column contains 'Hostname' with the value 'something.com.'. Below this table is another table with three columns: 'QA Text Input' (empty), 'Checkboxes' (Option 1bb), and 'Radios' (Option two). A blue 'Edit' button is located at the bottom right of the gadget.

Company Name	Organization ID	Hostname
Some Company	12345	something.com.

QA Text Input	Checkboxes	Radios
empty	Option 1bb	Option two

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.



This screenshot is identical to the one above, but the blue 'Edit' button at the bottom right is circled in red to highlight it.

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

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

The screenshot shows the 'Fields' configuration interface. At the top, there is a header 'Fields' and a sub-header '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.' Below this, there are several field categories: 'Company Name (default)' with a text input containing 'Some Company'; 'Organization ID (default)' with a text input containing '12345'; 'Hostname' with a text input containing 'something.com' and a green checkmark icon; 'QA Text Input' with a text input containing 'only 6' and a green checkmark icon; 'Checkboxes' with two options, 'Option 1bb' (checked) and 'Option 2a' (unchecked); and 'Radios' with two options, 'Option one' (unchecked) and 'Option two' (checked). An 'Add field' dropdown menu is open, showing options: 'Admin POC', 'Description', and 'URL Test' (highlighted with a red arrow). A red circle highlights the dropdown arrow icon. At the bottom, there is a warning message: 'Password fields must be encrypted before the update. Unencrypted values are ignored.' and two buttons: 'Save' and 'Cancel'.

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 the "Delete" icon - it will be available to re-add later, if needed.

Default fields cannot be removed from the Field Gadget and the "Delete" icon will appear shaded.

When a field is viewed that has a constraint applied, a "check" icon will display next to the field name. If a value that does not meet the constraint is entered, there will be a visual indicator that the input does not meet the constraint requirements.

The screenshot shows the 'Fields' configuration interface after some changes. The 'Add field' dropdown is now closed. The 'Hostname' field now contains 'something.com.' and has a green checkmark icon. The 'QA Text Input' field now contains 'only 6' and has a green checkmark icon. A new field, 'URL Test', has been added with a text input containing 'url...' and a green checkmark icon. The 'Checkboxes' section remains the same. The 'Radios' section now only shows 'Option one' (unchecked) and 'Option two' (checked). The 'Save' button is highlighted with a red circle. The warning message and 'Cancel' button are also visible.

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

Encrypted values must be encrypted prior to saving or the value will not be retained. Click the eye icon after inputting a value and click "Save".

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...

Company Name (default)

Organization ID (default)

Hostname help test

Checkboxes

Option 1bb

Option 2a

Radios

Option one

Option two

Encrypted data

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

Save **Cancel**

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 edit

Name: MyNewEntry (1234)	Section: New Section
ID: 50281	Category: 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](#):

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