

Customizing Fields

Working with Fields

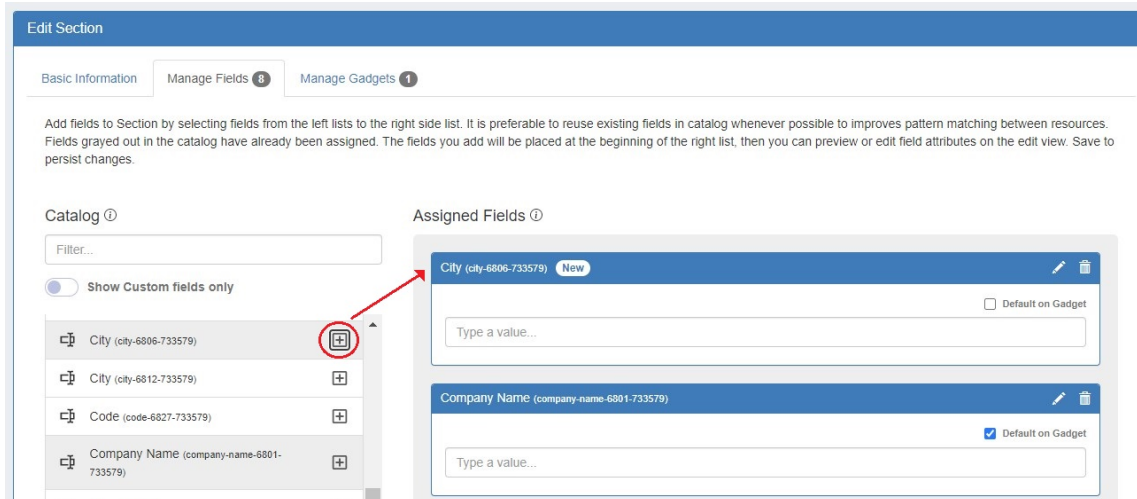
Fields are individual pieces of data that you can associate with a particular section. For example, you may want to have "Operating System", "Make", and "Model" fields for a server or device. There are many default fields to choose from, but you may also create custom fields and edit fields to suit your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

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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 ⓘ

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)

Default on Gadget

Model (model-6839-733579)

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, 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 ⓘ

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

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

Constrained Field

Default on Gadget

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

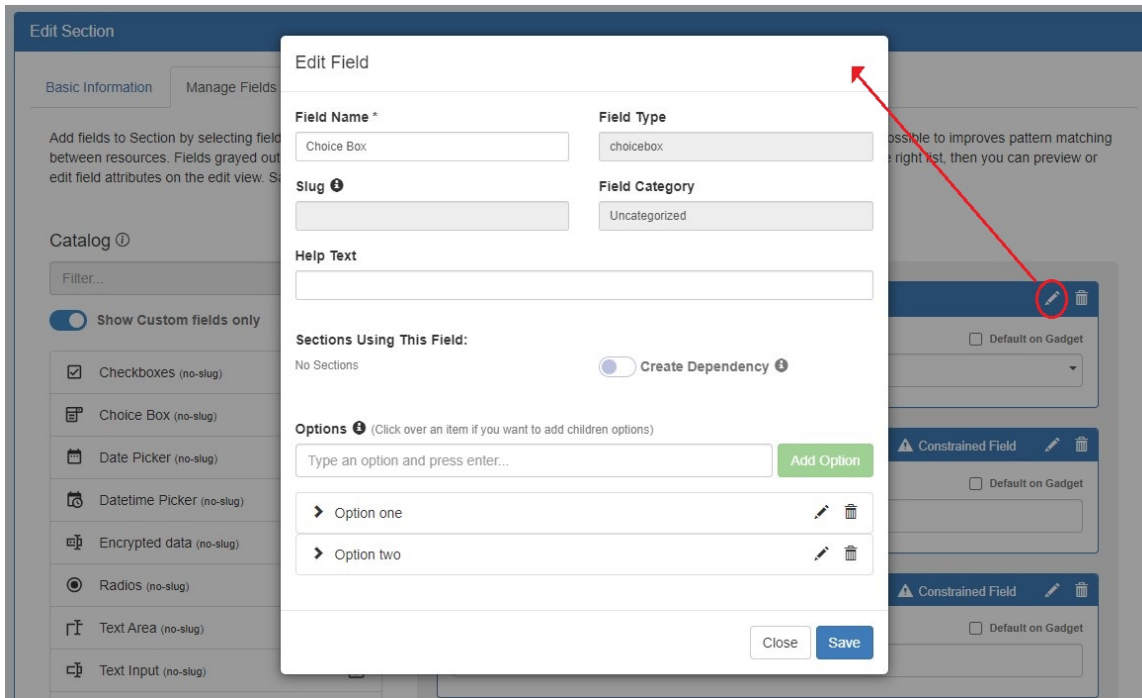
Default on Gadget

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

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 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.

Edit Field

Field Name *
Pets Choice

Field Type
choicebox

Slug

Field Category
Uncategorized

Help Text

Sections Using This Field:
No Sections ☐ Create Dependency

Options (Click over an item if you want to add children options)
Type an option and press enter... **Add Option**

▼ Cats **Add Child**

Type a child and press enter...

Tabby **Add Child**

Calico **Add Child**

Tuxedo **Add Child**

► Dogs **Add Child**

Close **Save**

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.

Edit Field

Field Name *
Pet Type

Field Type
choicebox

Slug

Field Category
Uncategorized

Help Text

Sections Using This Field:
No Sections ☒ **Create Dependency**

Parent Field
Pets Choice (field-pets-choice-16794-5987293-16794-5987293)

Close **Save**

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
Select...

Admin POC (default)
test

Description
test

Checkboxes (default)
☐ Option 1bb
☐ Option 2a

Pets Choice
Cats

Pet Type
Select...

Select...
Tabby
Calico
Tuxedo

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

Save
Cancel

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

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 screenshot shows a 'Preview Form' dialog box with a vertical scrollbar on the right. The form 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 currently displaying '7600 Series'.
- Make**: A dropdown menu currently displaying 'Arista'.

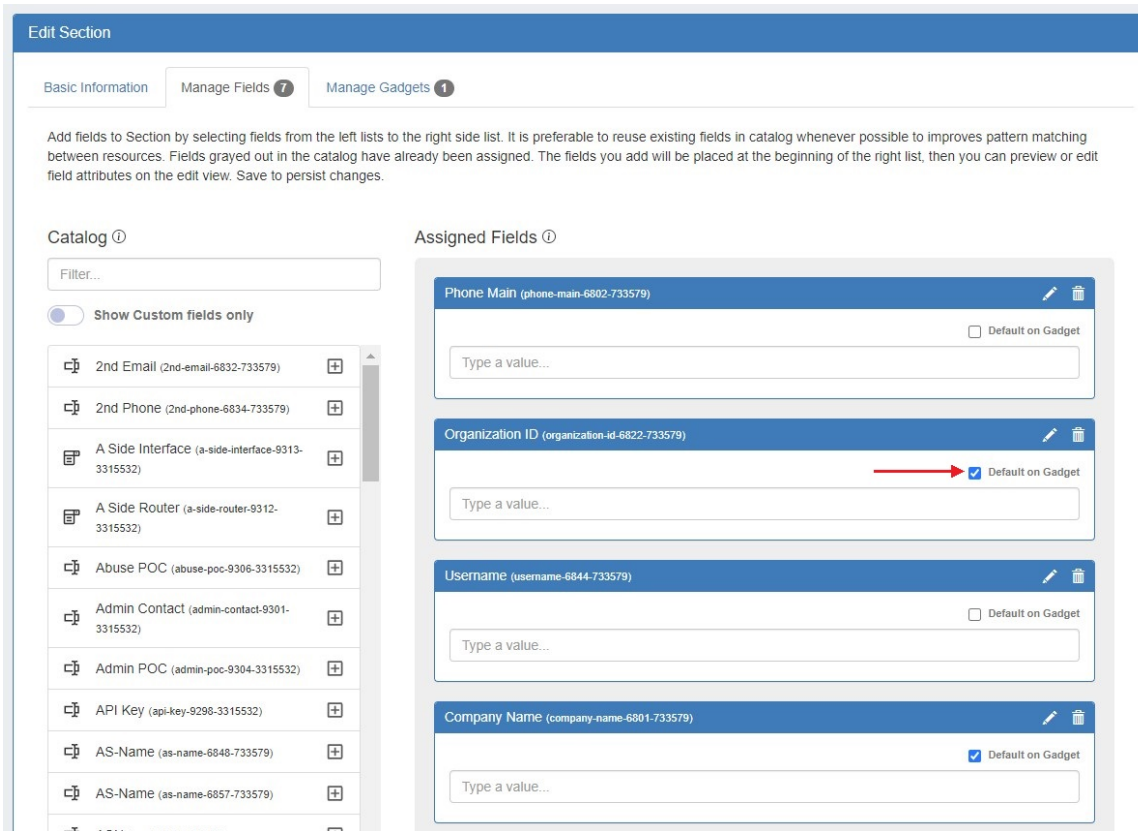
A 'Close' button is located at the bottom right of the dialog box.

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.

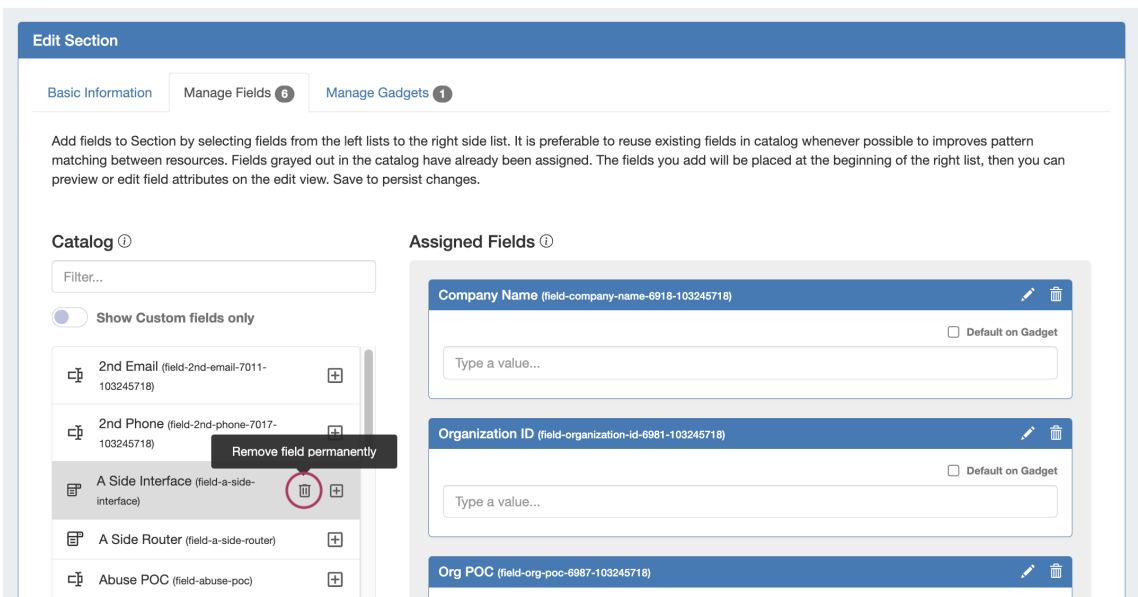
Deselecting default on gadget will remove any empty fields (Note: spaces / non-visible characters do count as values!), and require manual selection of fields to display via the Field Gadget.



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.



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.

Fields

Company Name Some Company	Organization ID 12345	Hostname something.com.
QA Text Input empty	Checkboxes Option 1bb	Radios 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.

Fields

Company Name Some Company	Organization ID 12345	Hostname something.com.
QA Text Input empty	Checkboxes Option 1bb	Radios Option two

Edit

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.

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)

Some Company

Organization ID (default)

12345

Hostname

something.com

help test

QA Text Input

only 6

qa

Checkboxes

☒ Option 1bb
☐ Option 2a

Radios

☐ Option one
☒ Option two

Admin POC

Description

URL Test

Save

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.

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)

Some Company

Organization ID (default)

12345

Hostname

something.com.

help test

QA Text Input

only 6

qa

URL Test

url...

qa again

Checkboxes

☒ Option 1bb
☐ Option 2a

Radios

☐ Option one
☒ Option two

Save

Cancel

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

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.

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

Resources / Entries / MyNewEntry

Resource View

Name: MyNewEntry (1234)	Section: New Section	edit
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](#)