

Customizing Sections

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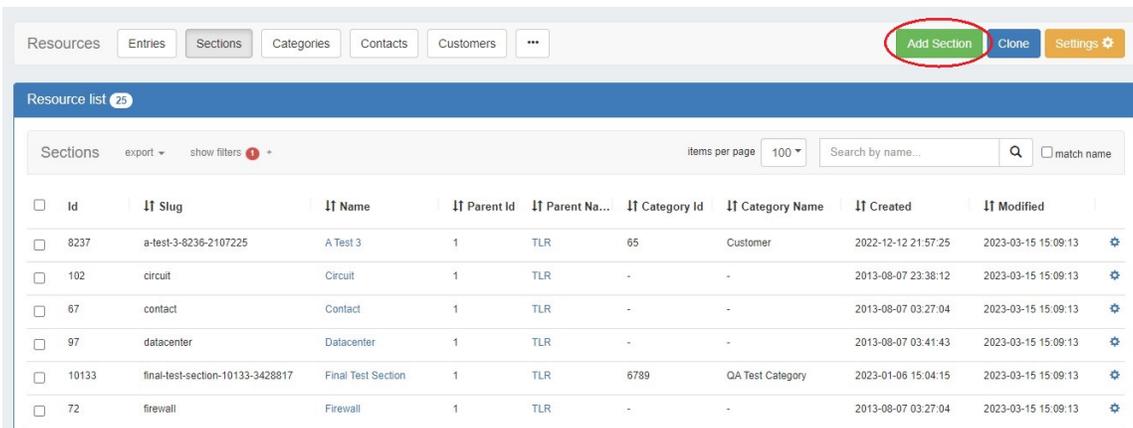
You can create as many sections as you wish (Firewall, Server, VM, Virtual Interface, etc.) and customize the gadgets and fields that apply to each section.

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.

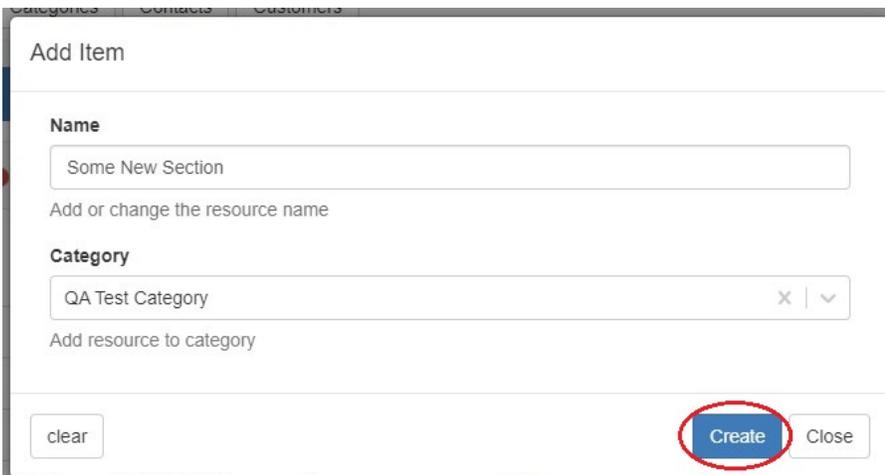
- Customizing Sections
 - Create a New Section
 - Edit a Section
 - Add Fields to a Section
 - Edit Field Data
 - Add a Dependent Field
 - Designate Default Fields
 - Apply a Constraint to a Field
 - Add Gadgets to a Section
 - Additional Information

Create a New Section

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



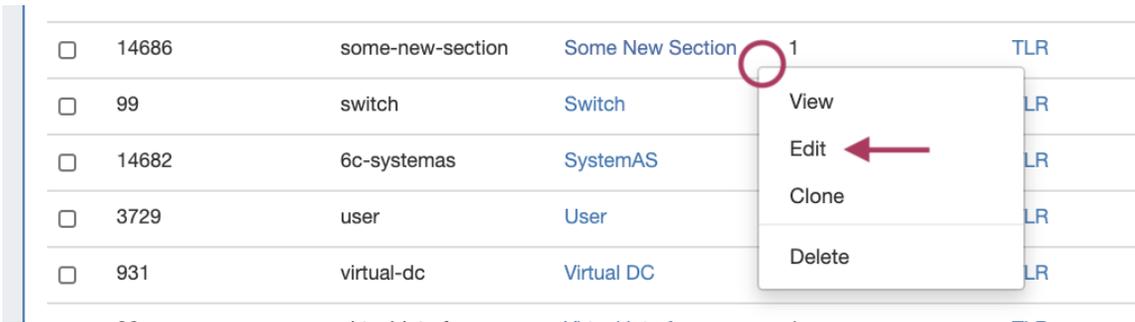
Create a new section by specifying a name and category. Then hit the "Create" button.



Edit a Section

There are two ways to access the edit section screen.

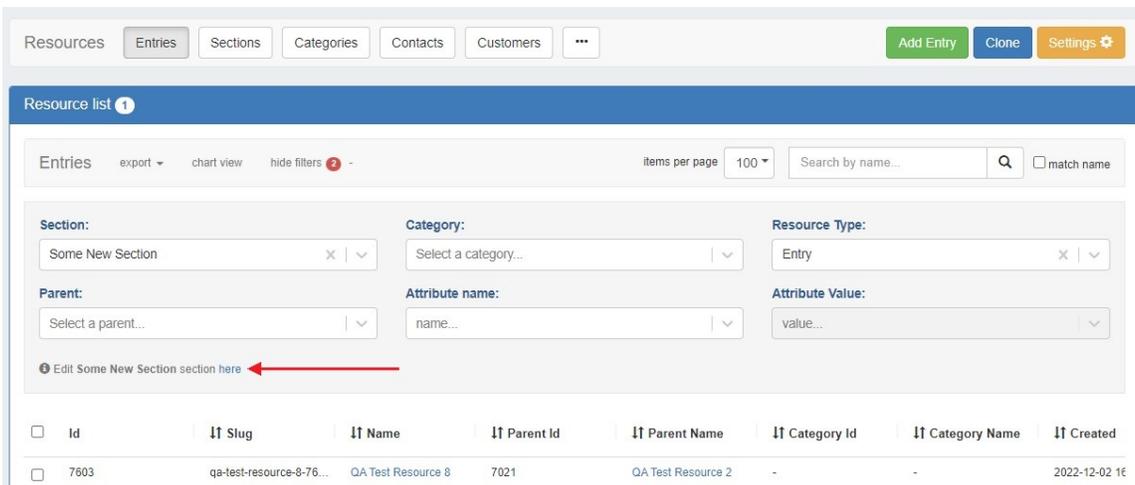
You can manage existing sections by opening the Action Menu for the section, then clicking "Edit".



The screenshot shows a table with columns for checkboxes, IDs, section names, and resource types. An action menu is open for the first row, showing options: View, Edit, Clone, and Delete. A red circle highlights the menu icon, and a red arrow points to the 'Edit' option.

<input type="checkbox"/>	ID	Section Name	Resource Type
<input type="checkbox"/>	14686	some-new-section	Some New Section
<input type="checkbox"/>	99	switch	Switch
<input type="checkbox"/>	14682	6c-systemas	SystemAS
<input type="checkbox"/>	3729	user	User
<input type="checkbox"/>	931	virtual-dc	Virtual DC

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 screenshot shows a 'Resource list' interface with a filter panel at the top. The filter panel includes fields for Section, Category, Resource Type, Parent, Attribute name, and Attribute Value. A red arrow points to a link that says 'Edit Some New Section section here'.

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

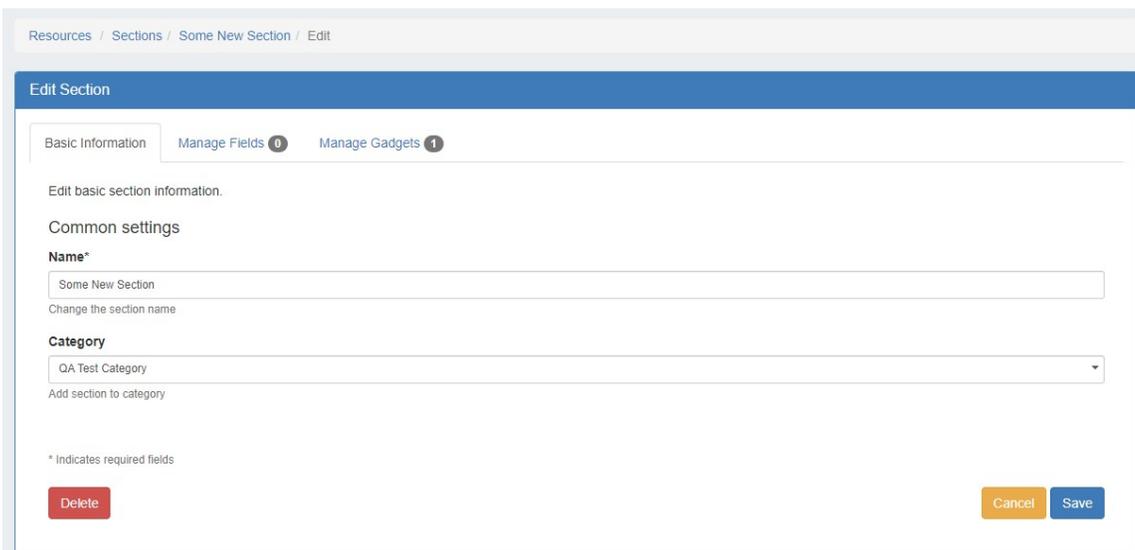
Section: Some New Section Category: Select a category... Resource Type: Entry

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

ⓘ Edit Some New Section section here

<input type="checkbox"/>	Id	Slug	Name	Parent Id	Parent Name	Category Id	Category Name	Created
<input type="checkbox"/>	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.



The screenshot shows the 'Edit Section' screen with three tabs: Basic Information, Manage Fields, and Manage Gadgets. The 'Basic Information' tab is active, showing fields for Name and Category. A red arrow points to the 'Delete' button.

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

Buttons: 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.

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.

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 ⓘ

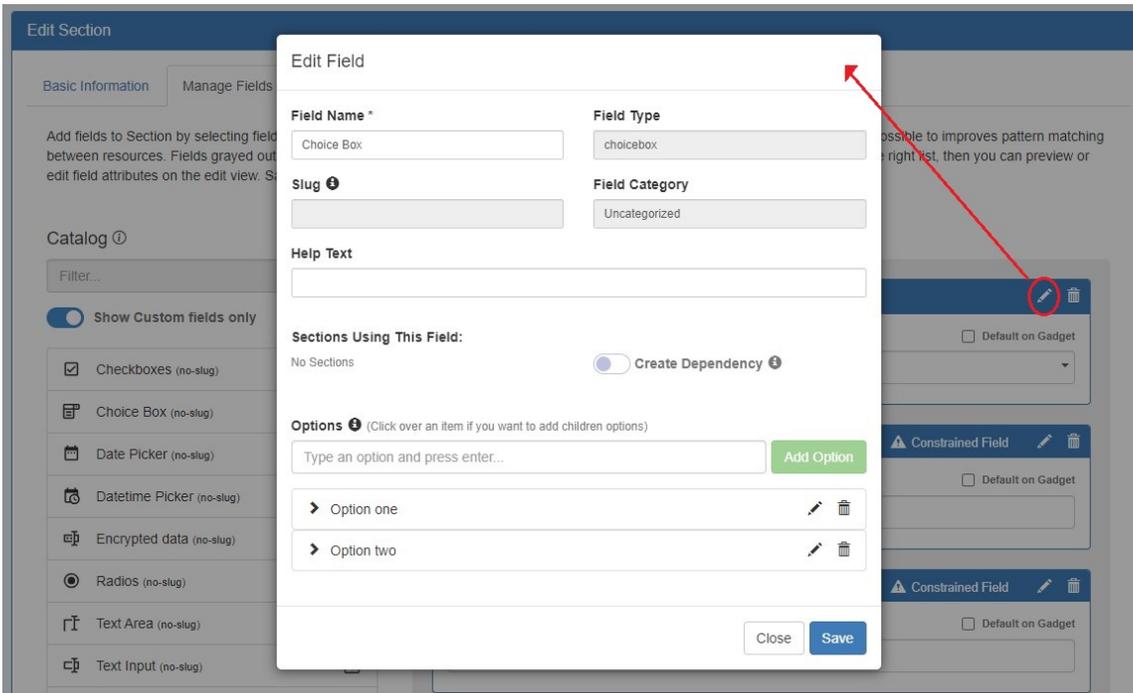
- Abuse POC** (field-abuse-poc-6993-103245718) ⚠ Constrained Field ✎ 🗑️
 Default on Gadget
Type a value...
- 2nd Email** (field-2nd-email-7011-103245718) ⚠ Constrained Field ✎ 🗑️
 Default on Gadget
Type a value...
- Time Zone** (field-time-zone-7023-103245718) ✎ 🗑️
 Default on Gadget
Type a value...
- IPv4 Address** (field-ipv4-address-7035-103245718) ✎ 🗑️
 Default on Gadget
Type a value...

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.

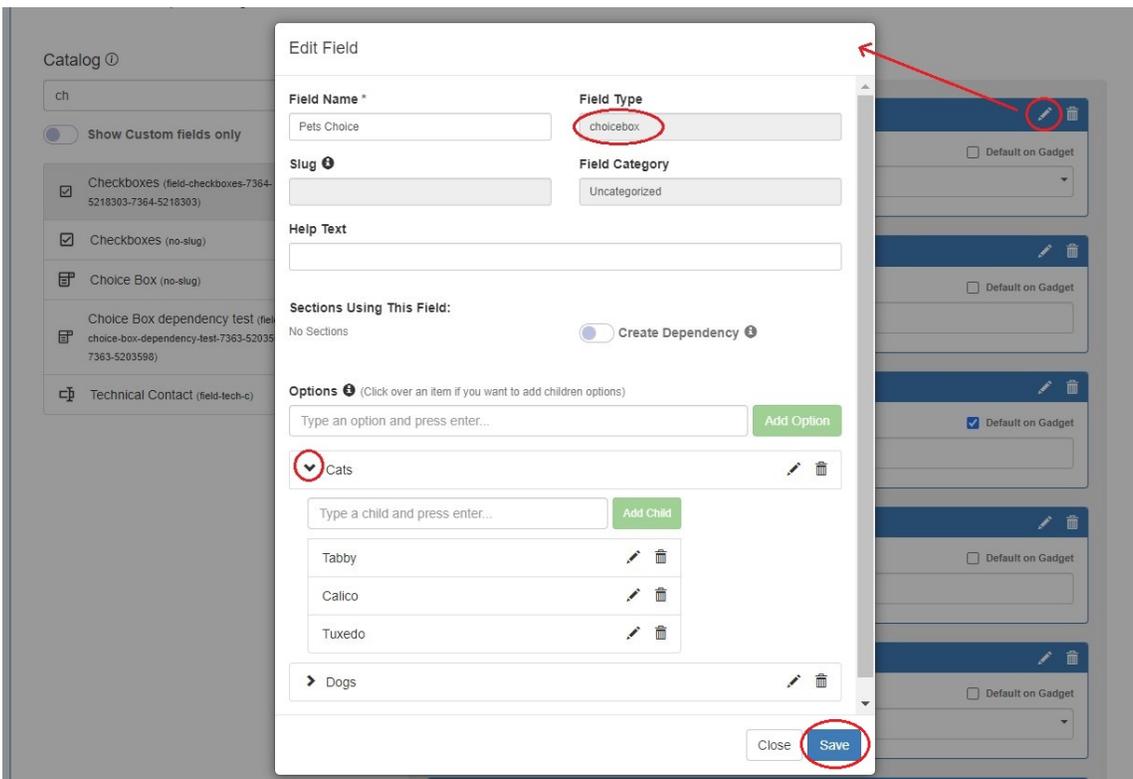


Any fields enabled here will be available to add to the field gadget, if desired.

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.

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 will be encrypted.
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)

Pets Choice (choicebox)

Pet Type (choicebox)

! The values which do not meet

Select an option
 Tabby
 Calico
 Tuxedo

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

Organization ID (organization-id-6822-733579)

Default on Gadget

Username (username-6844-733579)

Default on Gadget

Company Name (company-name-6801-733579)

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.

The image shows two parts of a user interface. The top part, titled "Resource View", displays details for a resource: Name: "An Example Resource 2 (1234)", Section: "Some New Section", ID: "15847", and Category: "Customer". An "Edit" button is located at the bottom right. The bottom part, titled "Fields", shows a list of fields for the resource. It includes "Company Name (default)" and "Organization ID (default)", both with input boxes containing "enter a value...". An "Add field" dropdown menu is open, showing options: "Note", "Admin POC", "First Name", and "Last Name". "Save" and "Cancel" buttons are at the bottom right of the fields section. A warning message states: "Password fields must be encrypted before the update. Unencrypted values are ignored."

Apply a Constraint to a Field

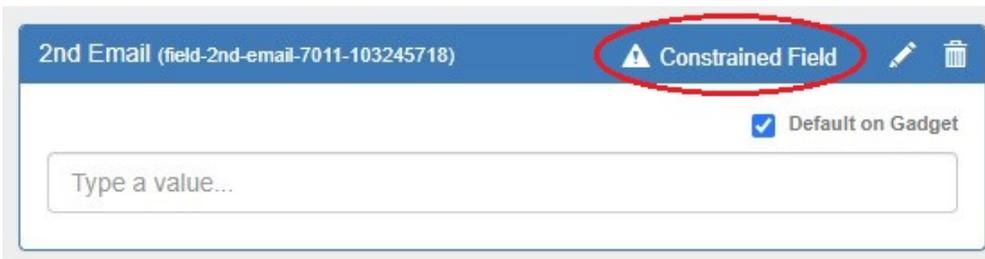
The Constraints system allows Admin users to configure custom field validation and limitations into Resource fields. Many constraint types are available to create in the Admin section. For more details on creating constraints see the [Constraints](#) section in the Admin Guide.

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

The image shows the "Edit Field" modal window. It contains several fields: "Field Name *" with the value "2nd Email", "Field Type" set to "text", "Slug" with the value "field-2nd-email-7011-103245718", and "Field Category" set to "Uncategorized". There is a "Help Text" field. The "Constraint" section shows a dropdown menu with "Email 1" selected, circled in red. Below this, a note states: "This constraint will be applied globally to this field across all sections that include it. This ensures consistency and uniformity in the data entered." The "Sections Using This Field:" section lists "Contact, QA Test Section 1". At the bottom right, there are "Close" and "Save" buttons, with "Save" circled in red. A red arrow points from the "Save" button back to the "Field Name" field. In the background, a list of field gadgets is visible, with one "Constrained Field" gadget circled in red.

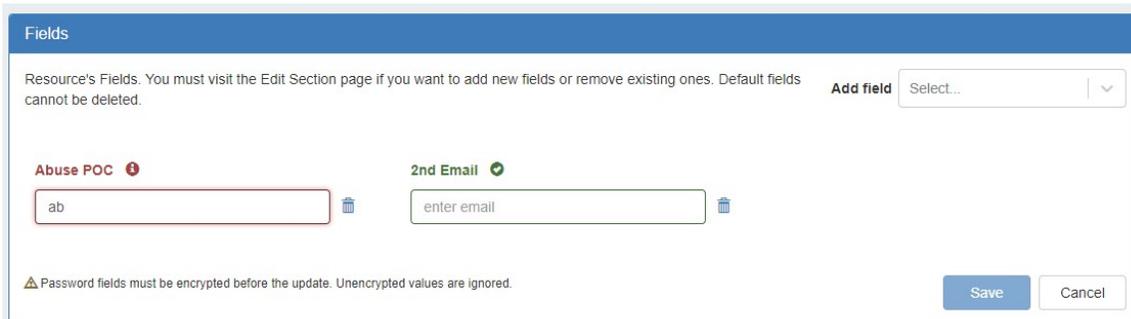
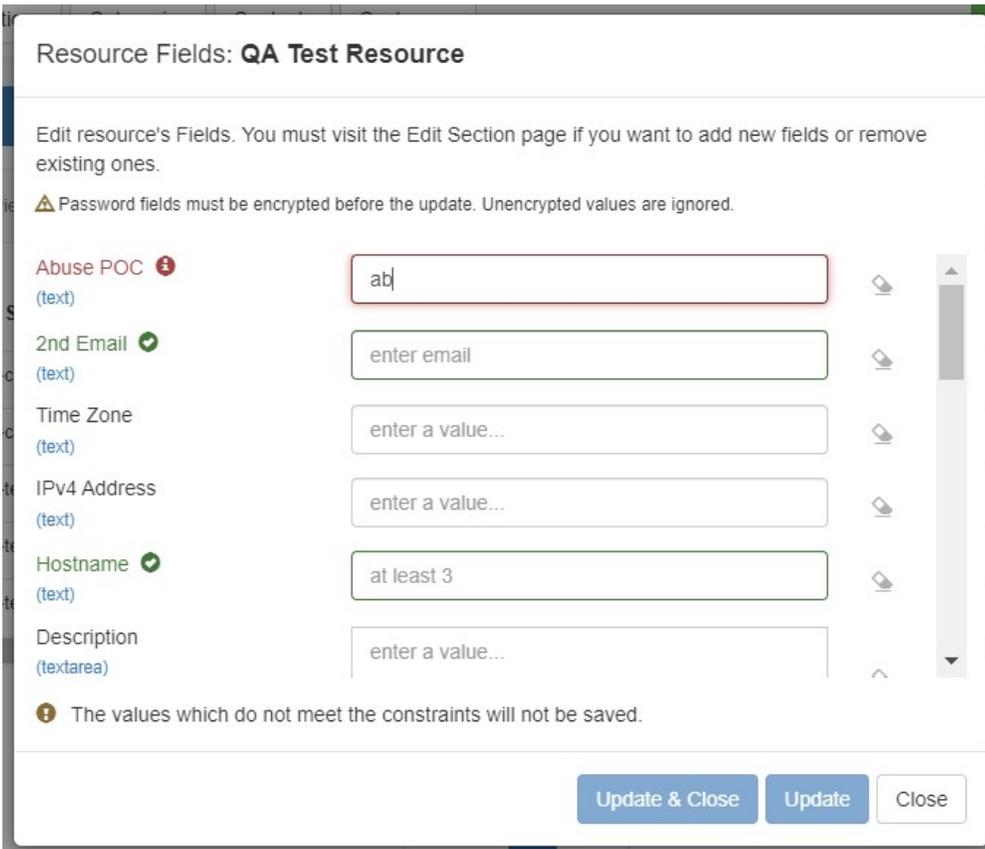
Applying a constraint to a field affects all sections to which a field is assigned. In the above example, adding a constraint to a field in QA Test Section 1 will also apply the constraint to the field in the Contact Section. You can see which sections are using the field displayed in the Edit Field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

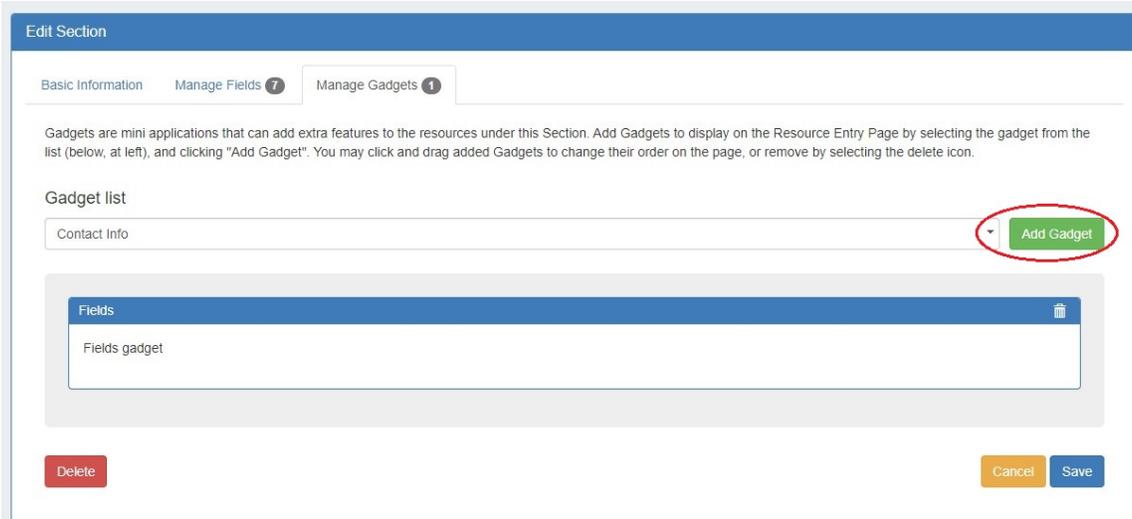


Remember to click "Save" at bottom right after you make any changes.

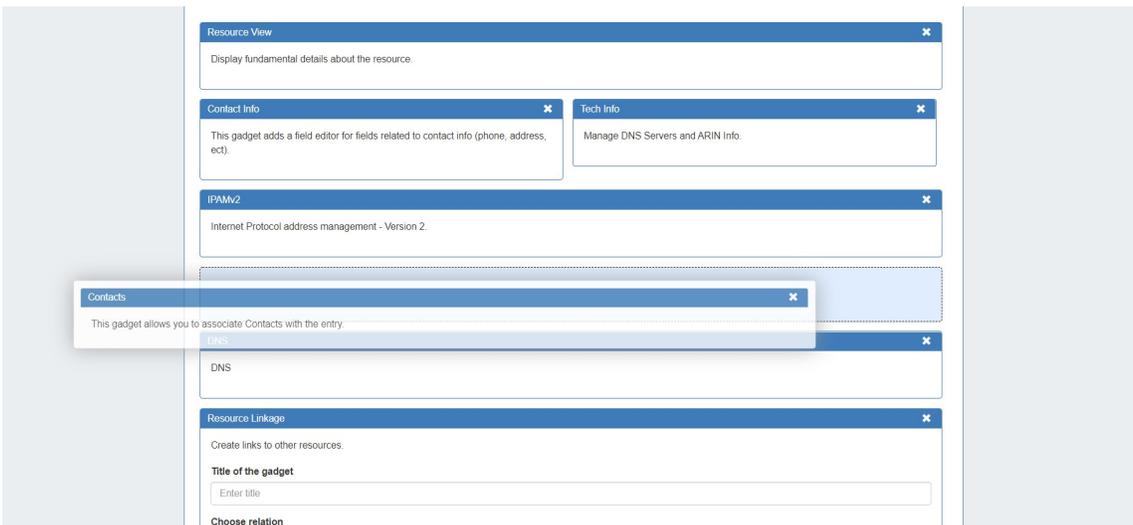


Add Gadgets to a Section

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 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](#)