Filtering, sorting, and searching for custom fields

Pre-release introduction

To better scale the SolarWinds Service Desk (SWSD) platform and offer more rich features, SolarWinds is introducing the ability to identify the custom fields your organization can filter by, sort by, and search by.

This document serves as a pre-release enablement notification to prepare you and your organization for the upcoming general availability (GA) release. The release will happen in two phases:

- Phase 1 is scheduled for November 10, 2024.
- Phase 2 will occur on January 12, 2025.

What to expect in Phase 1

When Phase 1 releases on November 10, 2024:

- SolarWinds will enable the ability for you to select which custom fields you want to be filterable/sortable and or searchable. New UI changes will be available at this time.

  Note: SolarWinds recommends that you identify the custom fields you want to be available for filtering/sorting and/or searching and configure them before the Phase 2 release.

  For instructions, see:

  - Step 1: Edit the Custom Fields index table view
  - Step 2: Configure custom fields to be filterable and sortable, and/or searchable
- All your existing custom fields will still be available for filtering/sorting and searching even though you have not selected them to be available. This will ensure that nothing breaks and there are no changes to any flows you already have in place. It also allows you time to select the custom fields you want to be available for filtering/sorting and searching when Phase 2 is implemented in one month.
- SolarWinds has been cataloging your currently used custom fields in filters and in sorting. When Phase 1 releases you will see that your custom fields are auto selected for the new options. Any new fields you create will not be auto selected and need to be configured by an admin via Setup. See Step 2: Configure custom fields to be filterable and sortable, and/or searchable.

What to expect in Phase 2

- Only custom fields that during Phase 1 you selected to be available for filtering/sorting and or searching will be available based on your selections and configurations.

- If a field was previously used in a report and not selected during Phase 1, the report will not yield an error page. Instead, it will display a message stating that the field is no longer available for the selected view or report. You can edit those views or reports to include fields you identified as filterable/sortable and searchable during Phase 1.

Instructions

Step 1: Edit the Custom Fields index table view

You can edit the custom fields index table view to see each custom field's status.

1. Navigate to Setup > Service Desk > Custom Fields.
2. Under All Custom Fields, click Edit View.
3. In the Edit View pane on the left, click the Columns tab. Notice the option to add the two new columns: (1) Filterable & Sortable, and (2) Searchable.
4. Place a check mark next to the column(s) you want to add to the index table view.

   After you have added the columns, you can see which custom fields are filterable and sortable, or searchable, or both. The columns display a status for each custom field.

Status	Description
Available	The field can be used in the selected manner.
Unavailable	The field is not available in the referenced manner.
Availability Pending	The platform is indexing the field to be available in the selected manner.
Unavailability Pending	The platform is removing the field from the indexes based on the selection.
Note: All custom fields are identified in the index table by one of the statuses above.	

Step 2: Configure custom fields to be filterable and sortable, and/or searchable

There will be limits on the number of custom fields you can make filterable/sortable and/or searchable. Thoss limits are based on the field type, for example, text or dropdown. You can see how many custom fields you can configure per type during the selection process. See Method 2.

Use one of the methods described below to configure.

Method 1

1. Navigate to Setup > Service Desk > Custom Fields.
2. Click the title of an existing custom field or click the + icon to the upper right to create a new one. If you create a new one, complete all the required fields.
3. Select the appropriate options for the custom field.

Option	Availability
Sorted alphanumerically	All custom field types

The custom field will be visible with both the filter view and sortable function	All custom field types
The custom field will be searchable	Text custom fields Text area custom fields Dropdown custom fields
Note: The Attachment field type is not searchable, sortable, or filterable.	

4. Click Save.

   If you made changes to an existing custom field, a popup displays asking you to confirm that you want to make the change to the field.

   The popup identifies all the custom forms and service catalog items where the field is used.

5. Click Confirm.

   Indexing of the custom field is pending. When indexing is complete, the field is available or unavailable, based on your selection.

Method 2

1. Navigate to Setup > Service Desk > Custom Fields.

2. Click the Actions dropdown in the upper right.

   Two options display: (1) Filterable and Sortable Custom Fields (2) Searchable Custom Fields

3. Make a selection.

   A pane on the left displays and lets you select, deselect, and see how many of each option type you have left available to select. The selected number adjusts live as you select and deselect fields.

4. When you finish making your selections, click Update.

   Indexing of the custom field is pending. When indexing is complete, the field is available or unavailable, based on your selection.

Indexing schedule

The fields you configured to be available for filtering/sorting and/or searching are indexed overnight, based on your datacenter. You can navigate to Setup > Account and locate your datacenter in the account summary.

Indexi ıg time for each datacenter	
Datacenter	**Indexing occurs nightly at:**
US	8pm PT
EU	8pm UTC
AU	8pm AET