

# Creating Layouts and First Fields

## Let's organize your project

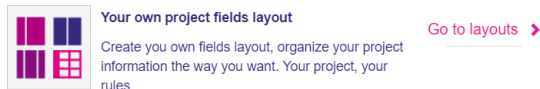
The first step you will need to do when using Profields is to create a Layout where you will place the Project Fields to start organizing your portfolio. Follow the steps to know more:

### Page content

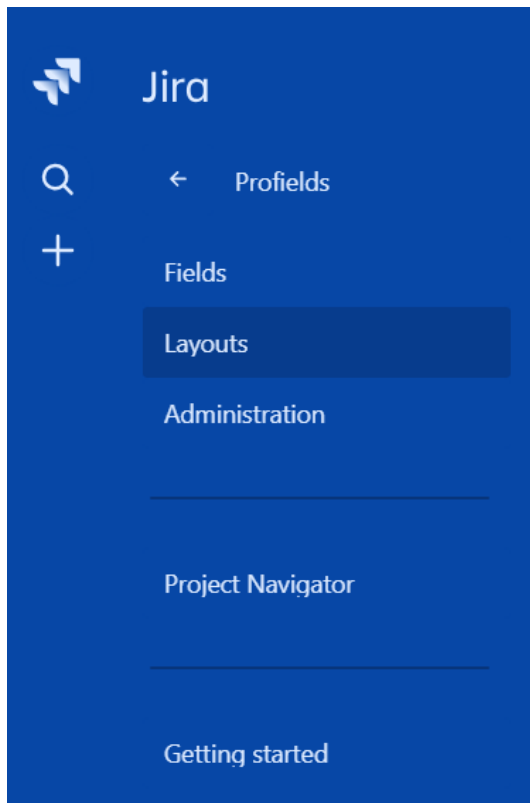
- [Step 2: Create your first project fields](#)
- [Step 2: Design the layout](#)
- [Next steps](#)

## Step 1: Starting with a Layout

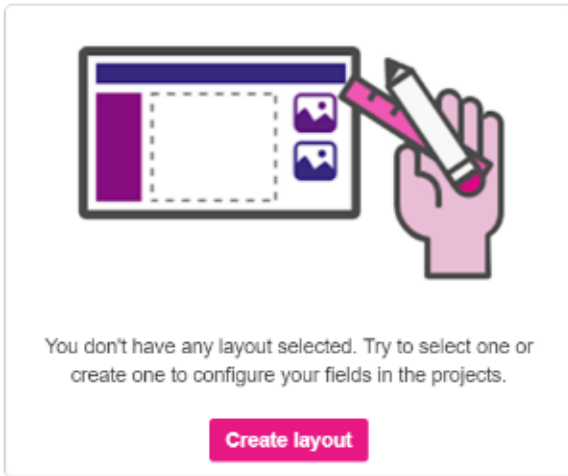
1. Click on the **"Go to layouts"** button on the Getting Started screen



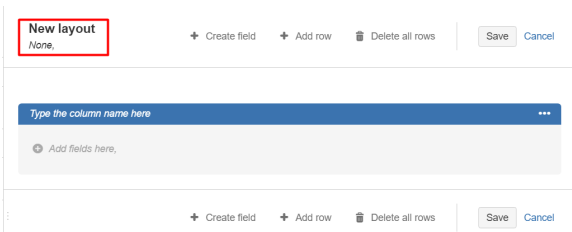
- a. Or go to the **Profields menu on the side bar** and click on **"Layouts"**



2. You will be redirected to the **Layout Manager** screen, the select **"Create layout"**.

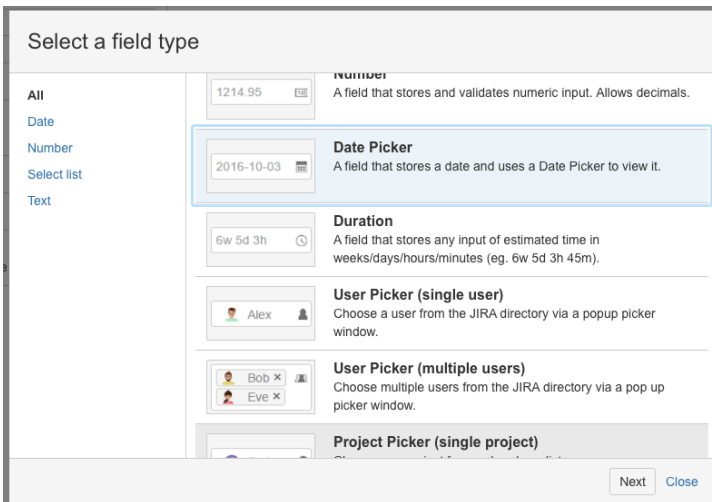


3. The first thing you can edit is the **Title and Description** by clicking on them directly



## Step 2: Create your first project fields

1. You don't have any field yet, click on "**Create field**" button to open the dialog for creating a new Project field
2. Select the field type you want, i.e. "Date picker". This one will create a date picker Project field to select a specific date



3. Type the field name and a description and click on **"Create"** when you are ready to go, the field will be created.

Configure 'Date Picker' field

Name\*

Project created

The name is shown as the field label.

Description

This field shows when the project was created

Write here the details about the field.

Previous Create Close

4. Once created you are ready to apply it to the Layout, click on **"Add fields here"** section inside the layout and you can select the recently created field from the list

Type the column name here

project

- Main project
- Main project
- Project created

Create field Add row Delete arrows Save Cancel

Type the column name here

**Project created**

2016-10-04

This field shows when the project was created

+ Add fields here

5. When selected you will have the field added to the Layout, repeat the action **Create field** all the times needed to have the fields that you need to organize your projects

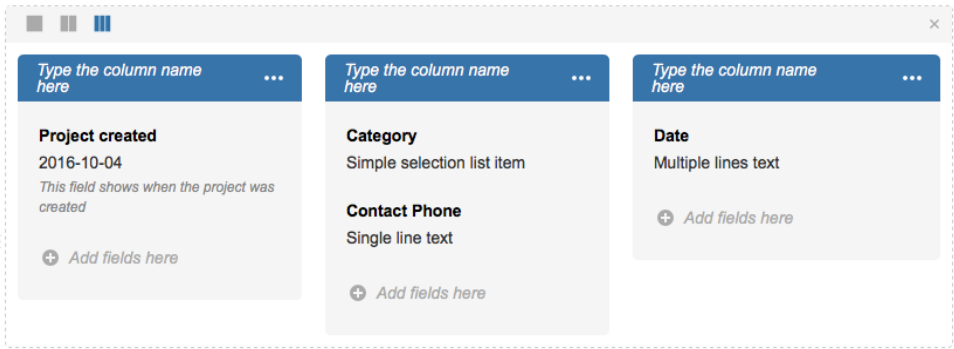
## Step 2: Design the layout

1. Create and add all the fields you want and add them to the Layout, do you need more columns and rows? No problem, just click on the **Columns button** on the top of every row it will be split into two or three columns. Click on one or two columns button again to have only those number of columns. **Your layout, your design!**

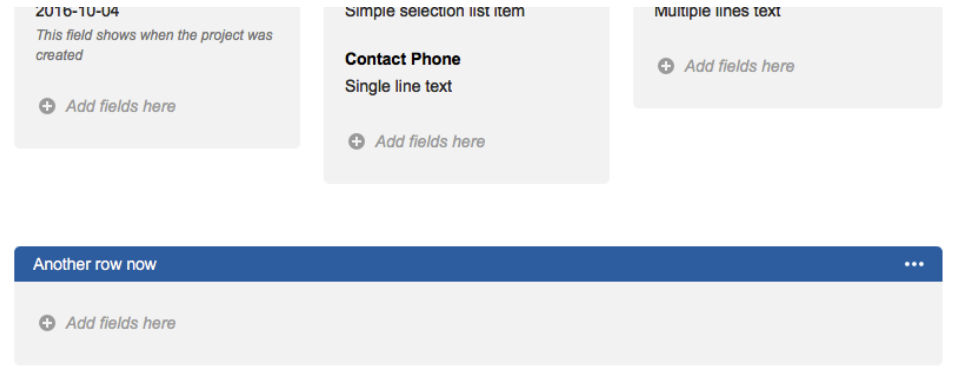
■ ■■ ■■■

Type the column name here

**Project created**

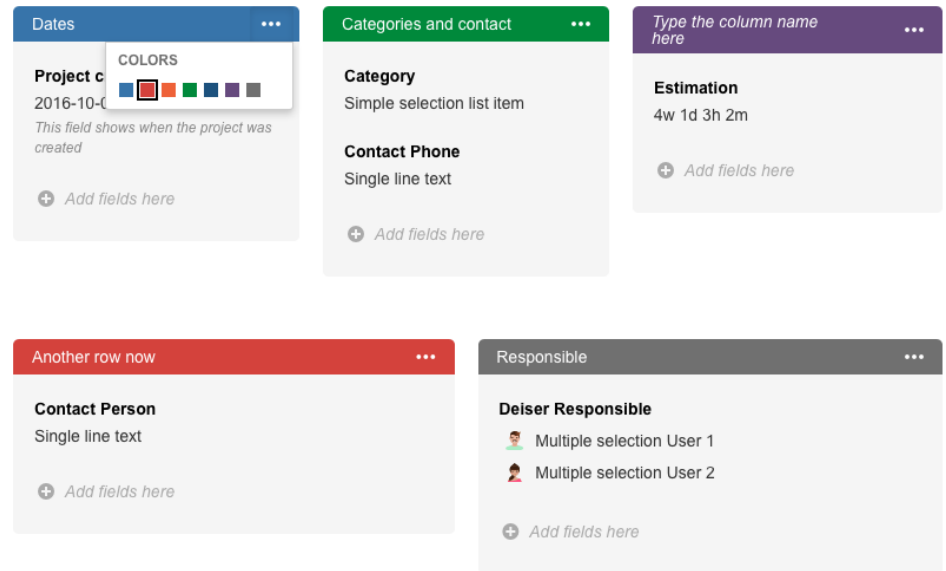


2. To have more rows on your Layout click on "Add row" button



+ Create field **+ Add row** 🗑 Delete all rows | Save Cancel

3. It's time to change columns color, click on the **Options** button on their right side and select the color you wish

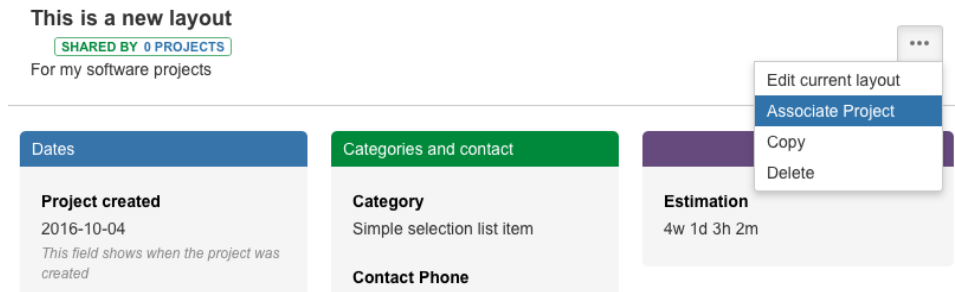


4. Have you realized you can **drag and drop** your fields from one column to another?

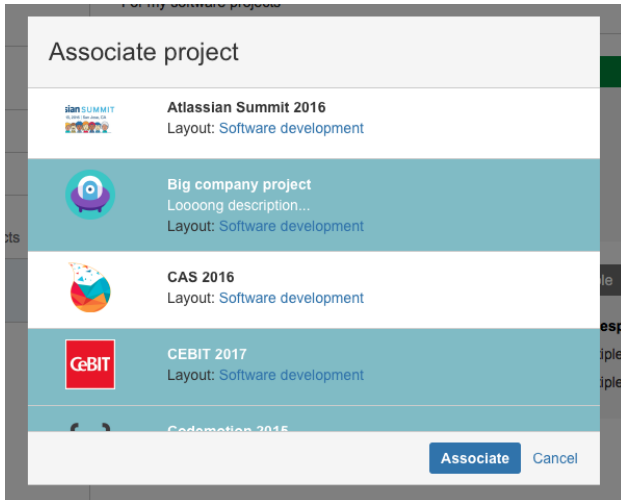
5. Click on the "Save" button when you have finished designing the Layout, don't worry, you can edit it whenever you want.

Save Cancel

- Now that the field is created you can apply to the projects, click on the **Layout options button** and then click on "**Associate project**".



- Select all the JIRA Projects that you wish to apply the Layout. **You can change this selection at any time without losing any field and value.**

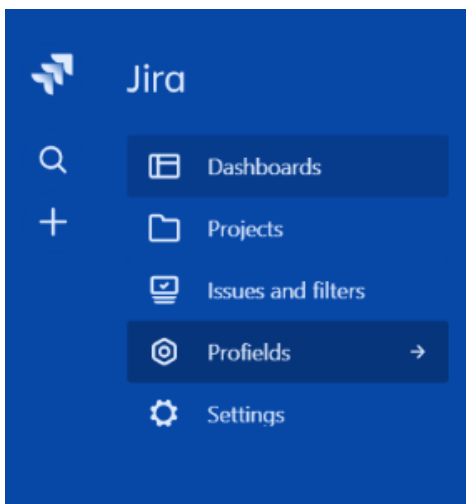


- When you are done selecting the projects, click on "**Associate**" to complete the action.
- Congratulations!** You have created your firsts Project Fields and a Layout that is applied to one or more Projects.

## Next steps

The next step is to give value to your recently created fields

- Go to the Project screen of those which you wish to edit
- Click on the **Profields button**



3. If you have applied a Layout on this Project, will be shown with the fields values empty

**Software development** SHARED BY 9 PROJECTS Edit values ...

This is the layout used for all the software projects

**Project Info**

**Main project**  
Application for investment funds

**Status**  
In Progress  
Status of the project

**Component**  
Others  
Component of the project

**Estimate**

**Due Date**  
2016-09-01  
Due date of the project

**Estimation**  
3d 6h  
Estimation time of the project

**Project Roles**

**Lead Developer**  
Admin Deiser [Administrator]

**FrontEnd Lead**  
Profields Cloud

**Scrum Master**  
Exporter Cloud

**Product Owner**  
Carl Cranston

**Supplier**

**Supplier**  
Marketing company  
This is the component's supplier

**Country**  
Spain

**Contact**

**Contact Phone**  
445 332 331  
Contact's phone number

4. Click on "Edit values" button to enter the edit mode

Edit values ...

**Project Roles**

**Lead Developer**  
Admin Deiser [Administrator]

**FrontEnd Lead**  
Profields Cloud

**Scrum Master**  
Exporter Cloud

**Product Owner**  
Carl Cranston

5. Select and type the values in the fields

6. Click on "Save" button