



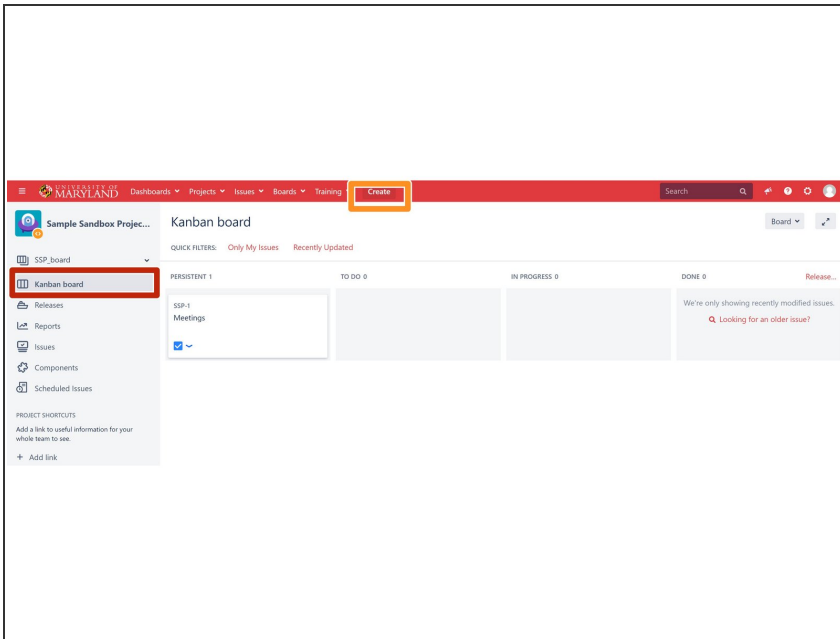
# Creating Tasks in a Design Project

This is a short guide for Project Managers about creating tasks in a Jira project and assigning them to student designers

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The screenshot shows the Jira interface for a project named "Sample Sandbox Project". At the top, a red navigation bar contains the University of Maryland logo, a hamburger menu, and several dropdown menus: "Dashboards", "Projects", "Issues", "Boards", and "Training". A "Create" button is highlighted with a yellow border. To the right of these menus is a search bar and user profile icons. On the left side, a sidebar lists various project items: "SSP\_board", "Kanban board" (highlighted with a red border), "Releases", "Reports", "Issues", "Components", and "Scheduled Issues". Below this is a "PROJECT SHORTCUTS" section with a link to "Add link". The main area is titled "Kanban board" and shows a Kanban workflow with four columns: "PERSISTENT 1", "TO DO 0", "IN PROGRESS 0", and "DONE 0". The "PERSISTENT 1" column contains a card titled "SSP-1 Meetings" with a blue checkmark and a dropdown arrow. The "TO DO" and "IN PROGRESS" columns are empty. The "DONE" column contains a message: "We're only showing recently modified issues. Looking for an older issue?". A "Release..." button is visible in the top right corner of the board area.

## Step 1 — Creating an Issue



- During the estimating process, the **PM** should break a design progress into specific jobs, e.g. CAD a motor mount or write controls software. These specific jobs are each entered into the Jira Project as an issue
- Open the Jira Project and navigate to the Kanban board.
- Hit the "Create" button to create a new issue. The **PM** will need to create a new issue for each specific job associated with a project.

## Step 2 — Details of The Issue

The image displays two side-by-side screenshots of the 'Create Issue' form in a software application. The left screenshot shows the initial form with fields for Project, Issue Type, Summary, Reporter, Component/s, Attachment, Due Date, and Description. The right screenshot shows the form after some fields have been filled out, including Assignee, Priority, Labels, Original Estimate, and Remaining Estimate.

**Left Screenshot (Initial Form):**

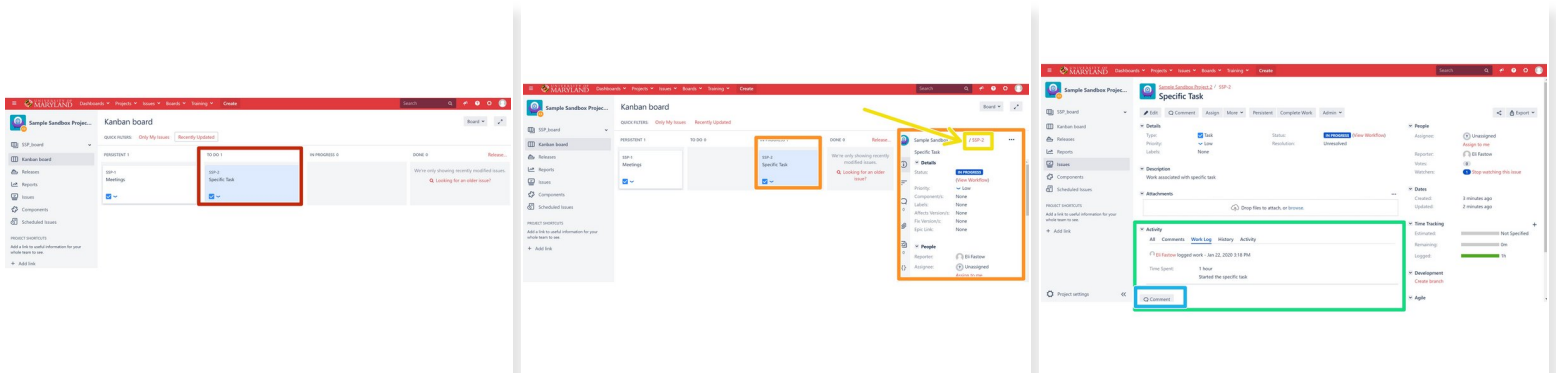
- Project:** Sample Sandbox Project 2 (SS...)
- Issue Type:** Task
- Summary:** Specific Task
- Reporter:** Eli Fastow
- Component/s:** None
- Attachment:** Drop files to attach, or browse.
- Due Date:** (Empty date field)
- Description:** Work associated with specific task

**Right Screenshot (Form with Fields Filled):**

- Visual/Text:** Text tab selected
- Assignee:** Automatic
- Priority:** Low
- Labels:** (Empty label field)
- Original Estimate:** (Empty field) (eg. 3w 4d 12h)
- Remaining Estimate:** (Empty field) (eg. 3w 4d 12h)

- Insure that the Issue is created in the correct project and is a "Task"
- Name the issue with a brief description of the work to be done
- Set a due date as informed by the estimate prepared for the customer
- Write a few sentence description of the work to be done. This will be an important reference for the **SD/SDE** who will complete the issue
- The **PM** should assign a **SD/SDE** on the team for this design project to complete this issue.
- The **PM** should set an original estimate informed by the statement of work sent to the customer
- Set a priority that accurately reflects the importance of the task

## Step 3 — Tracking an Issue



- Once you create the issue, it will automatically populate into the "To Do" column
  - As a **SD/SDE** starts work on the issue, it should move into the "In Progress" column.
  - Clicking on the issue opens a sidebar with summary information. Here you can read the details about the issue as well as comments made along the way.
  - Click on the issue key link to open a more detailed view of the issue.
  - The issue page opened by clicking the link has all details relevant to the issue
  - Notably, the activity section at the bottom has a record of the Comments, Work Log, and History
  - Anyone (either **PDM** or **SD/SDE**) who wishes to communicate information regarding the progress of the task should leave a comment
- i** Note: Customers may be able to view comments, use professional language