ezytax BLUE

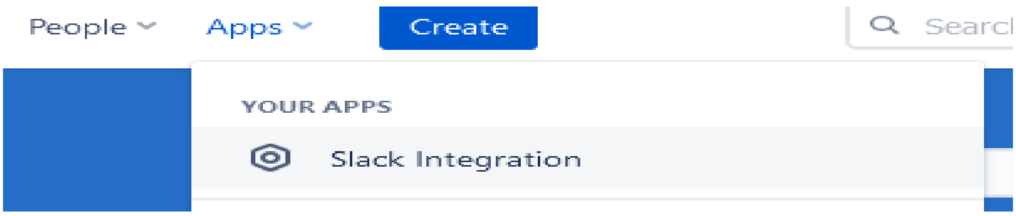
JIRA manual

JIRA WORK MANAGEMENT

Jira Work Management is used for tracking outstanding work and ensuring it gets completed. When you get email clients, all work needs to be recorded in Jira so that all the proper processes are met and avoid missing out on information/payment of invoices or neglecting to follow up.

Once you accept the Jira Work Management invitation, you can create your log-in details.

You should connect Slack to your Jira account by clicking Apps dropdown menu > Slack Integration. You can then create Jira Issues via Slack.



ACCESSING A PROJECT

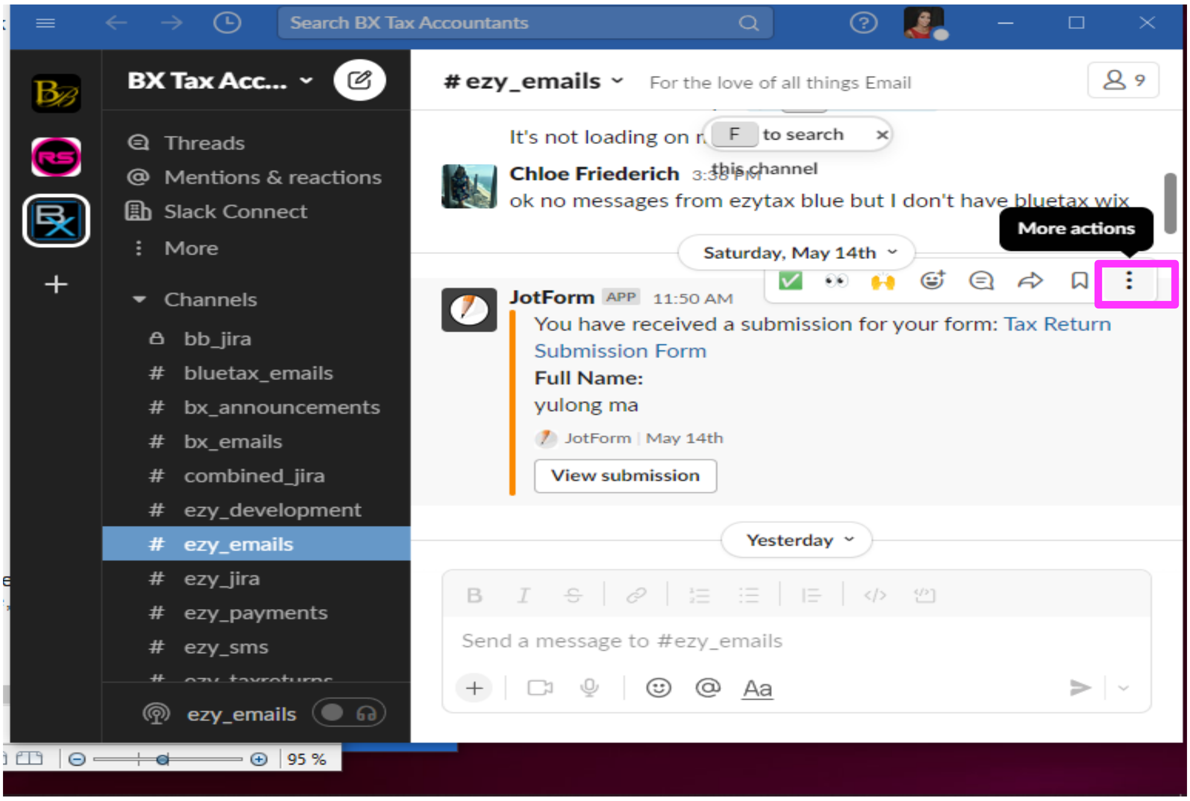
Choose Projects and select a project, or choose View all projects to visit the projects directory

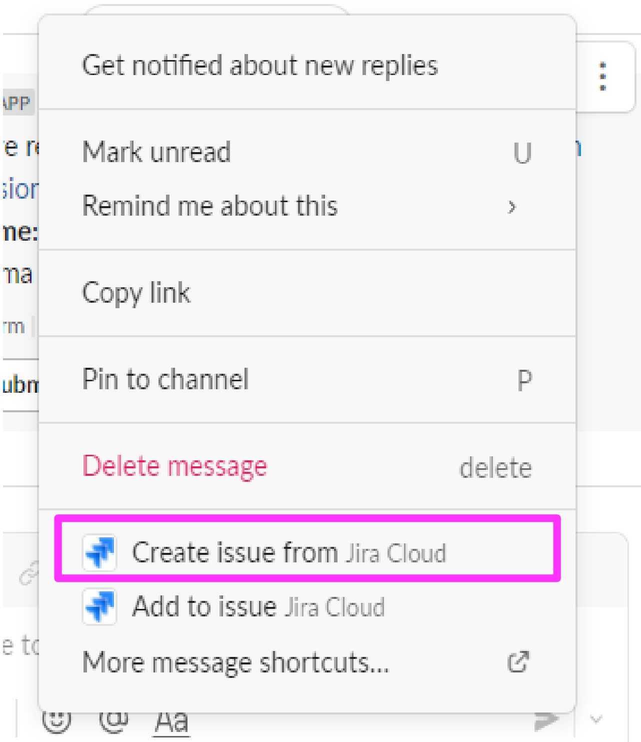
You'll land on the project board, which lets you track the status of issues in this project

You can view and filter the issues in your project so that you see, for example, only issues that are assigned to you. In your project, select Issues in the project sidebar. From here, you can preview issues, and select preconfigured filters to change which issues are displayed.

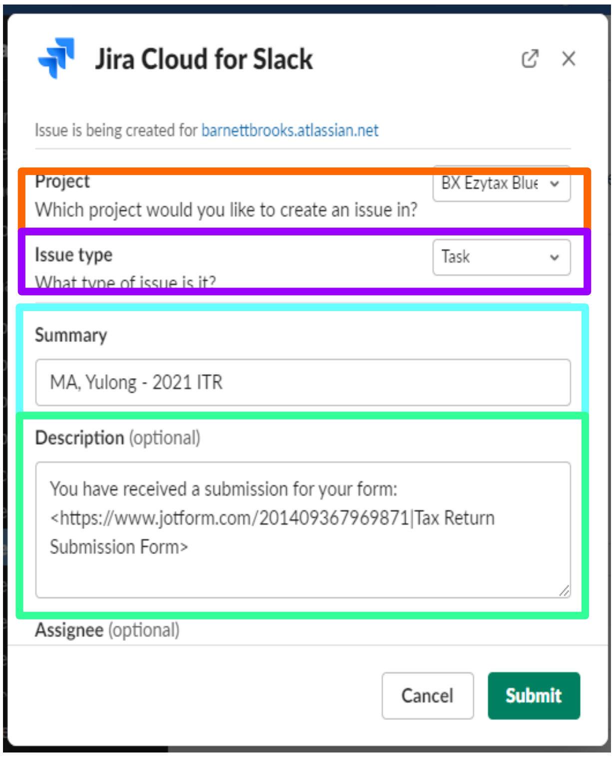
CREATING JIRA ISSUES VIA SLACK

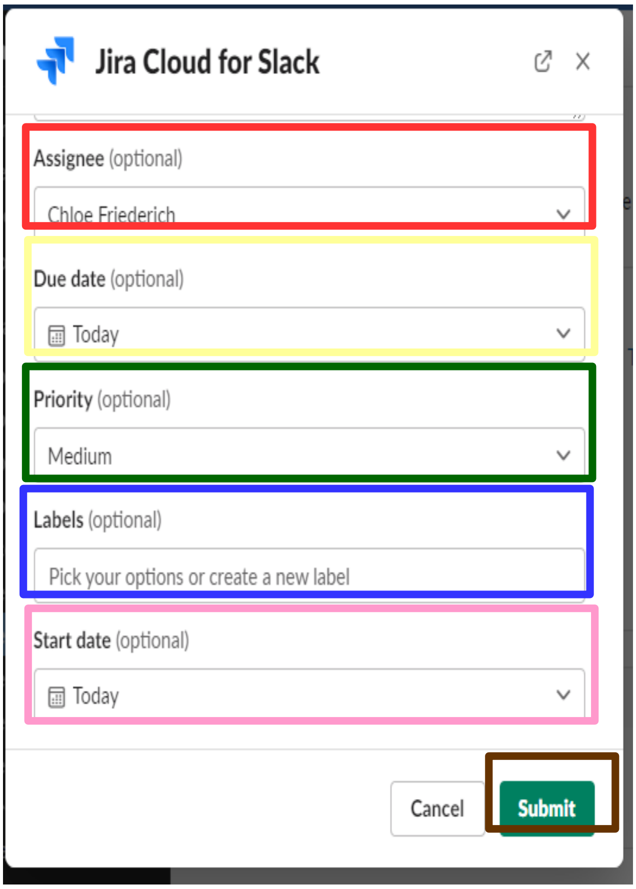
1. Slack messsage > 3 dots More Actions > **Create issue from Jira Cloud**





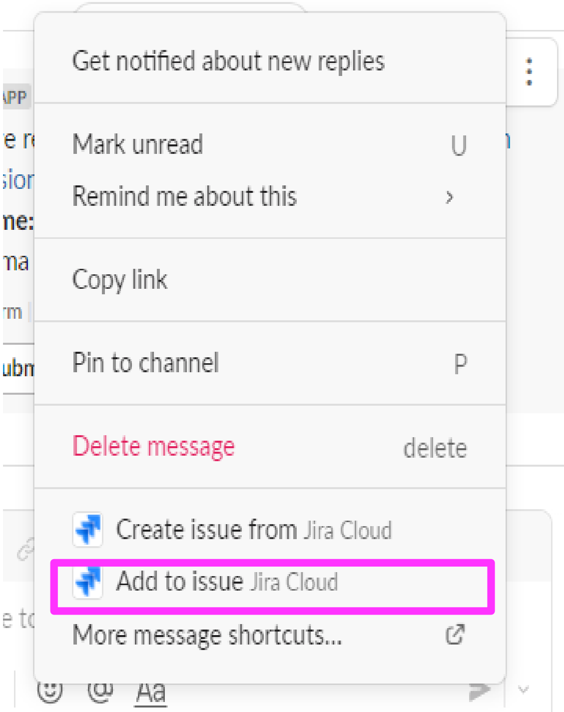
2. **Project** – Click dropdown button to choose correct project (business)
    - ➔ Ezytax Blue
    - ➔ BarnettBrooks
    - ➔ BlueTax Online
3. **Issue Type** – Task
4. **Summary** – LASTNAME, FirstName – What the job is. Eg: MA, Yulong – 2021 ITR
5. **Description** – Area to post more details
6. **Assignee** – Choose who is doing the task
7. **Due Date** – Chose a date that the job should be completed by
8. **Priority** – Choose the level of urgency. Most are "Medium"
9. **Labels** – Labels classify the task such as NLA, Tax, Paid, OSEmails, etc. Multiple labels can be used.
10. **Start Date** – Day we receive the job/email.
11. **Submit** – To post the issue to Jira from Slack.

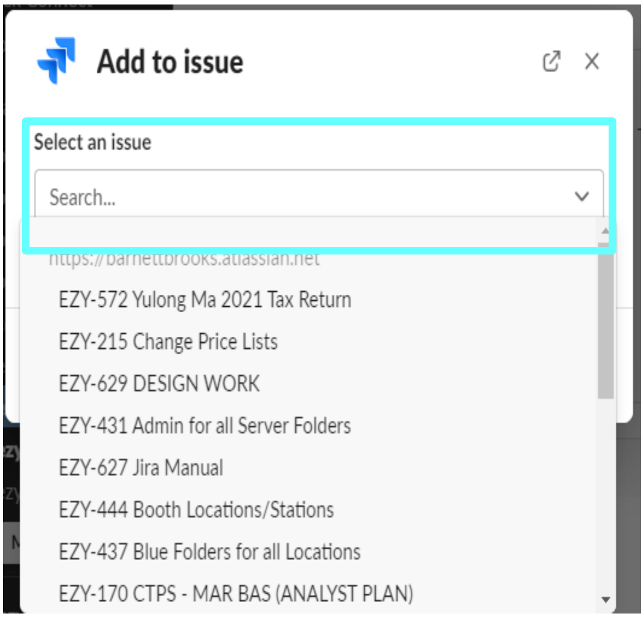




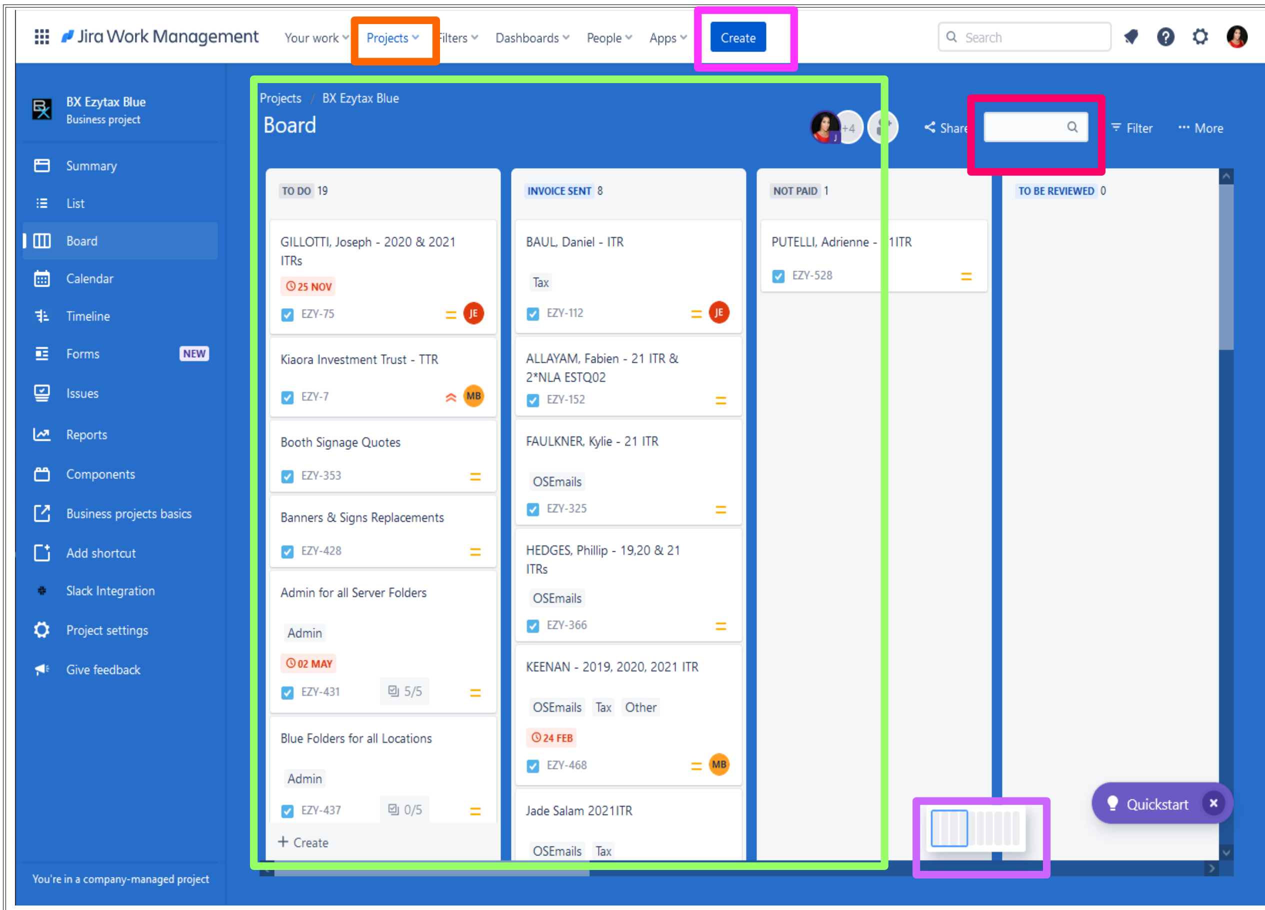
Alternatively, if there is already an issue in Jira then you can **Add To Issue:**

1. Slack messsage > 3 dots More Actions > **Add to issue** Jira Cloud
2. **Select an Issue** > Find the relevant issue in the dropdown or type in the issue number.
3. Click Add.





<u>CREATE AND WORK WITH ISSUES</u>



BOARD – Where you can see all the issues/jobs and their relevant statuses:

- To Do – Jobs received and to be completed asap
- Invoice Sent – Invoice has been sent via PayPal for the job
- Not Paid – Invoices unpaid
- To Be Reviewed – Job is completed and awaiting review before being sent for signing
- Reviewed – Job is reviewed and is ready for signing
- AdobeSign – Job has been sent for signing via AdobeSign
- Outstanding – Job is outstanding as awaiting further information from the client
- To Be Lodged – Signed documents have been received and is ready to be lodged/set to complete for lodging
- Done – Job has been lodged and is completed
- Archive – Job has not progressed therefore is archived

SLIDER – To slide across to see all boards

SEARCH – To seach the boards for an issue/client

Click **Create** in the navigation bar

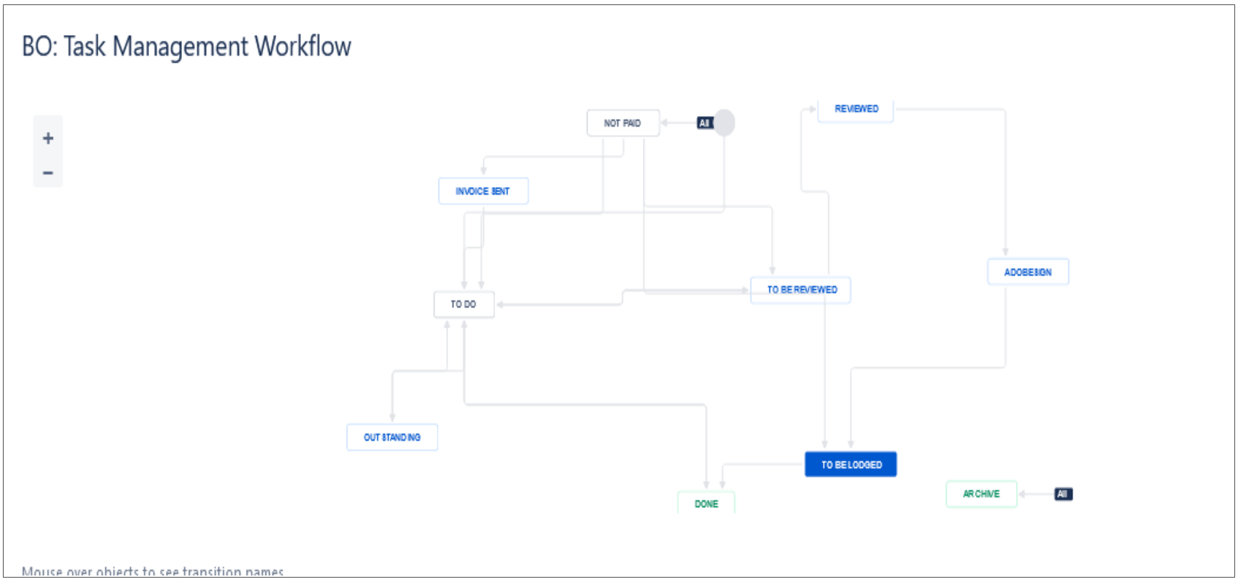
1. Fill out the fields

- **Project:** Which project does this issue belong to
- **Summary:** Client name and what is the issue (example Tax Return)
- **Attachments:** Upload documents such as CIF & Prefill
- **Due Date:** When the issue must be completed by
- **Description:** Give detailed information about the client and the issue
- **Assignee:** Who is assigned to work on the issue
- **Priority:** Importance of issue
- **Labels:** Things that the issue is related to (example tax, BAS, OS emails**)**
- **Original Estimate:** How long should the issue take to complete
- **Start date:** Planned start date

2. Click **Create**

WORKFLOW

The lifecycle of an issue is managed by a workflow. A workflow consists of issue statuses —like *To Do* and *Done*—and the transitions between each status.



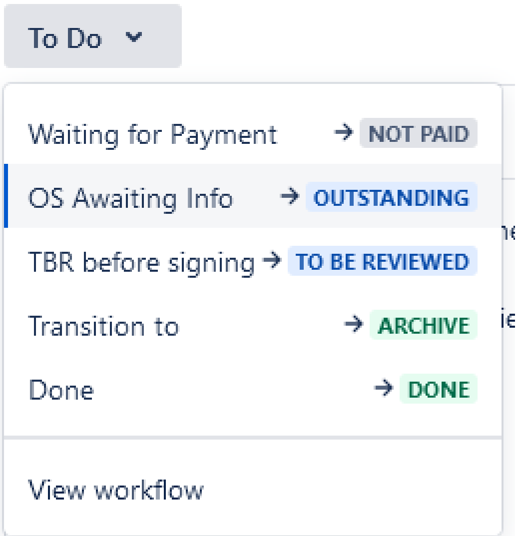
TRANSITIONING THE ISSUE

Press **TO DO**

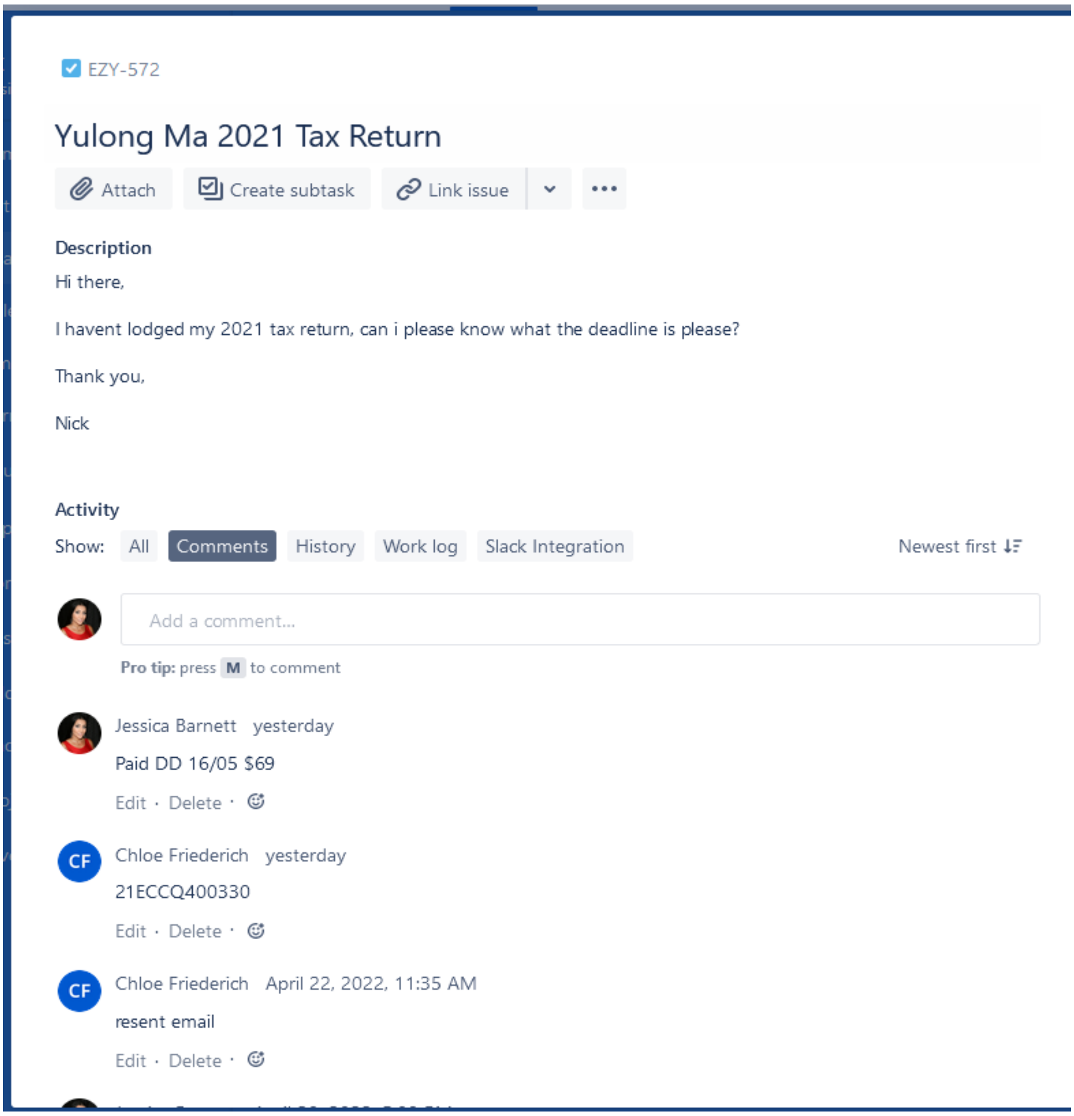
You will see the current status of the issue and can change it to a different status. Changing the status transitions the issue to a different status in the workflow. As you manage the issue, it will go through different statuses until it reaches **DONE.**

To Do > Outstanding > Not Paid > Invoice Sent > To Do > To Be Reviewed > Reviewed > ADOBESIGN > To be Lodged > Done

This is the general workflow of an issue.



Write a comment when information is needed, invoice number and amount when invoice is sent, if work needs to be completed, emails received and any relevant updates.

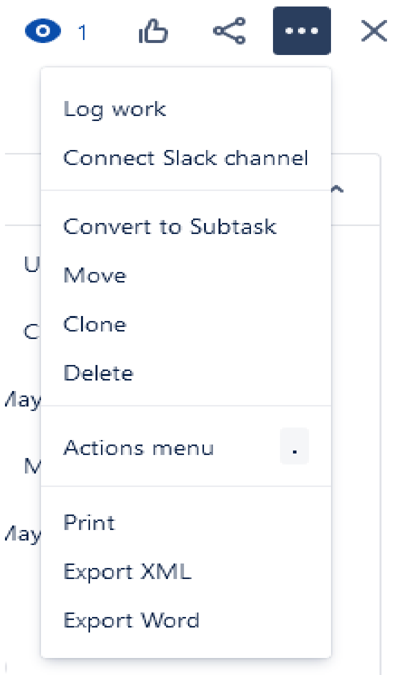

EZY-572
Yulong Ma 2021 Tax Return
Attach
Create subtask
Link issue
Description
Hi there,
I havent lodged my 2021 tax return, can i please know what the deadline is please?
Thank you,
Nick
Activity
Show:
All
Comments
History
Work log
Slack Integration
Newest first
Add a comment...
Pro tip: press M to comment
Jessica Barnett yesterday
Paid DD 16/05 $69
Edit · Delete ·
CF
Chloe Friederich yesterday
21ECCQ400330
Edit · Delete ·
CF
Chloe Friederich April 22, 2022, 11:35 AM
resent email
Edit · Delete ·

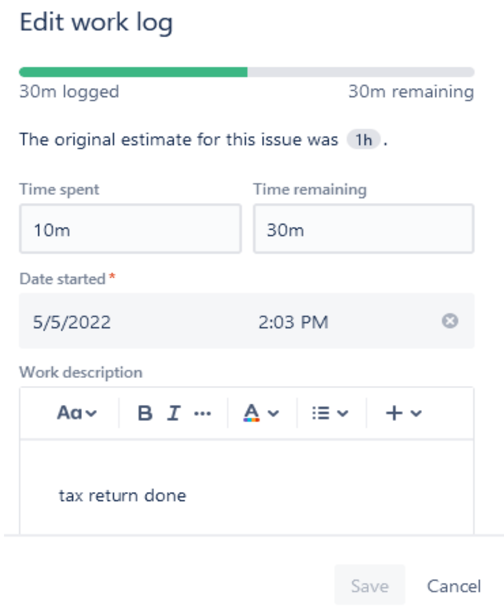
WORKLOG

You will need to log how much time spent on completing an issue.

Press **Actions** Menu > **Worklog**

Write how much time was spent and a work description explaining what was done. You can monitor time spent on the issue and how much time is remaining to complete it.



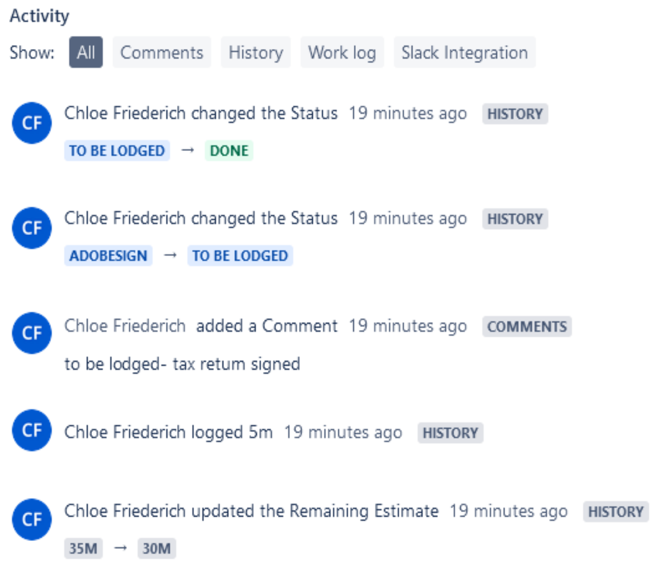


ACTIVITY

You can see the comments, history and worklog of the issue.

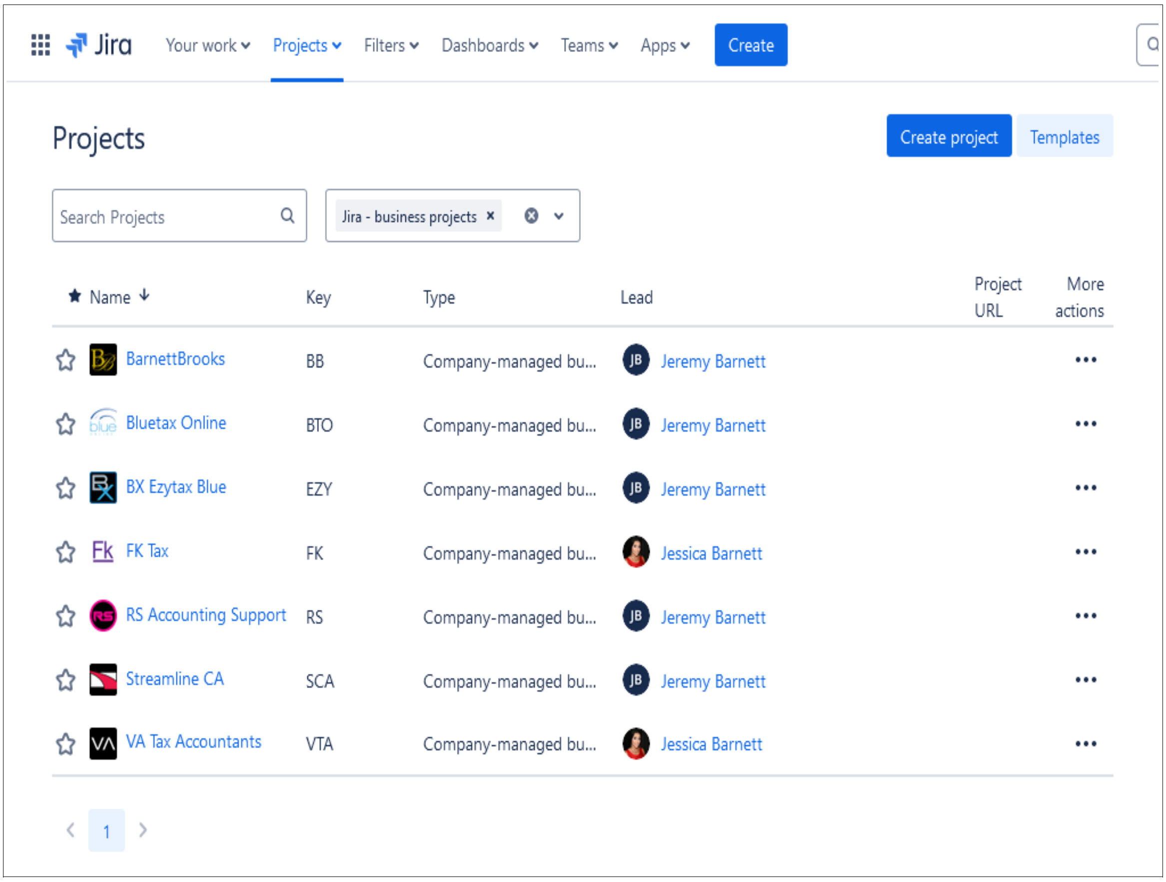
This is useful in backtracking on what has been done, the transitioning of status, worklog and comments.

This can be found under the **Activity** bar.



PROJECTS

Ensure you click on the CORRECT project for the CORRECT business.


Jira
Your work
Projects
Filters
Dashboards
Teams
Apps
Create
Projects
Create project
Templates
Search Projects
Jira - business projects
Name
Key
Type
Lead
Project URL
More actions
BarnettBrooks
BB
Company-managed bu...
Jeremy Barnett
Bluetax Online
BTO
Company-managed bu...
Jeremy Barnett
BX Ezytax Blue
EZY
Company-managed bu...
Jeremy Barnett
FK Tax
FK
Company-managed bu...
Jessica Barnett
RS Accounting Support
RS
Company-managed bu...
Jeremy Barnett
Streamline CA
SCA
Company-managed bu...
Jeremy Barnett
VA Tax Accountants
VTA
Company-managed bu...
Jessica Barnett
1