

ezytax  
BLUE

JIRA  
manual

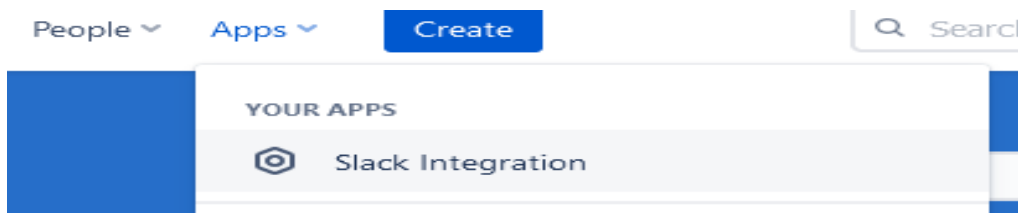


## **JIRA WORK MANAGEMENT**

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**

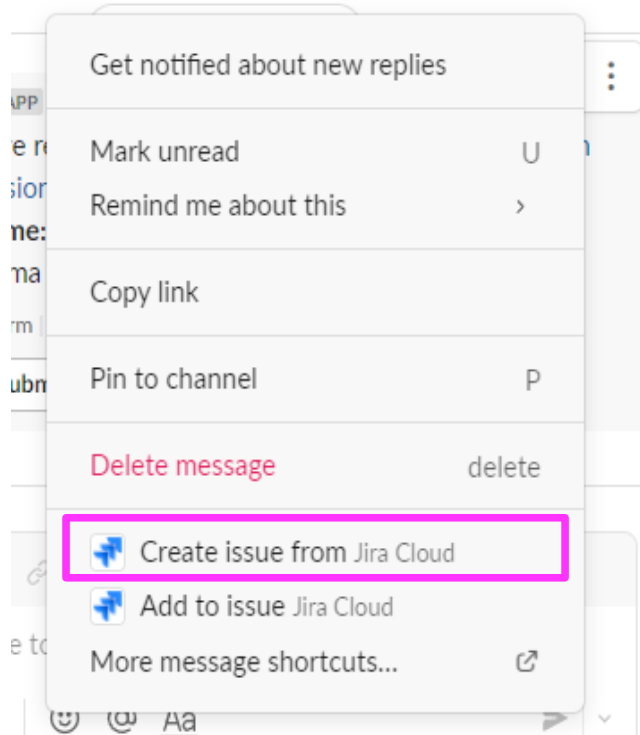
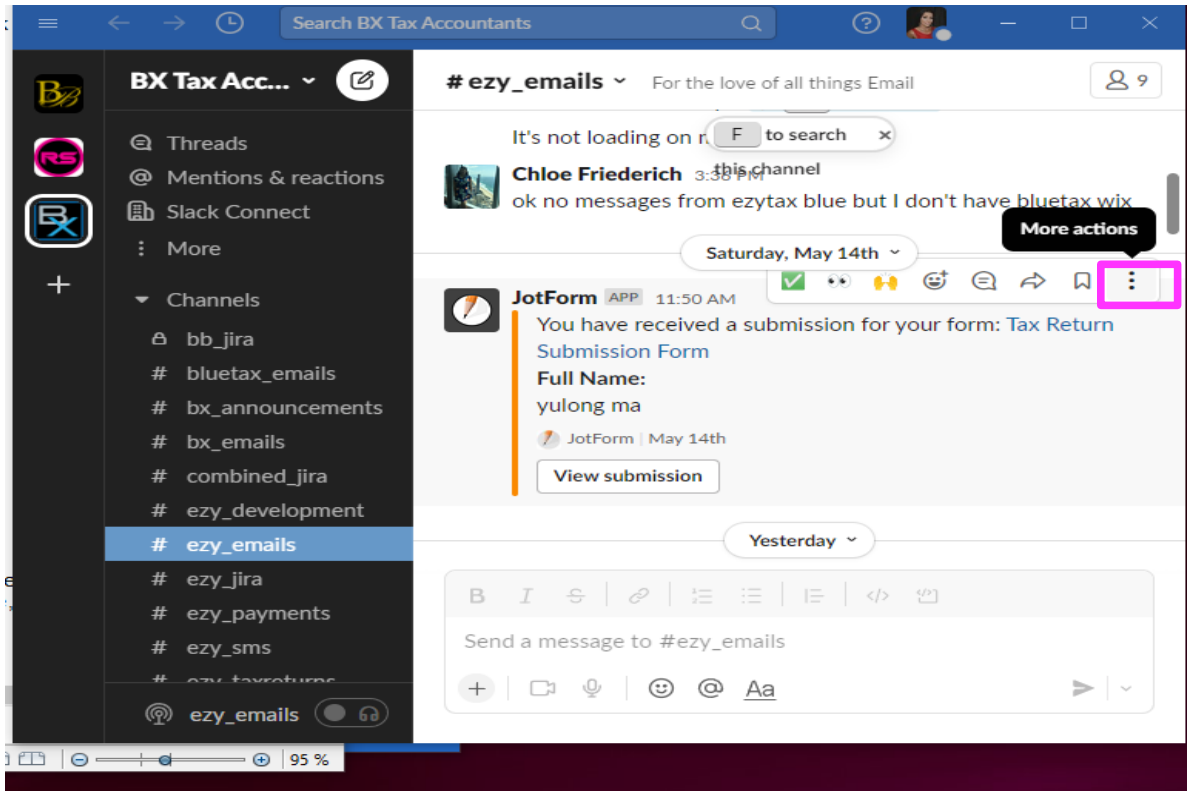
Choose Projects and select a project, or choose View all projects to visit the projects directory

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 message > 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.

Jira Cloud for Slack

Issue is being created for [barnettbrooks.atlassian.net](#)

**Project** BX Ezytax Blue  
Which project would you like to create an issue in?

**Issue type** Task  
What type of issue is it?

**Summary**  
MA, Yulong - 2021 ITR

**Description (optional)**  
You have received a submission for your form:  
<<https://www.jotform.com/201409367969871>|Tax Return Submission Form>

**Assignee (optional)**

Cancel Submit

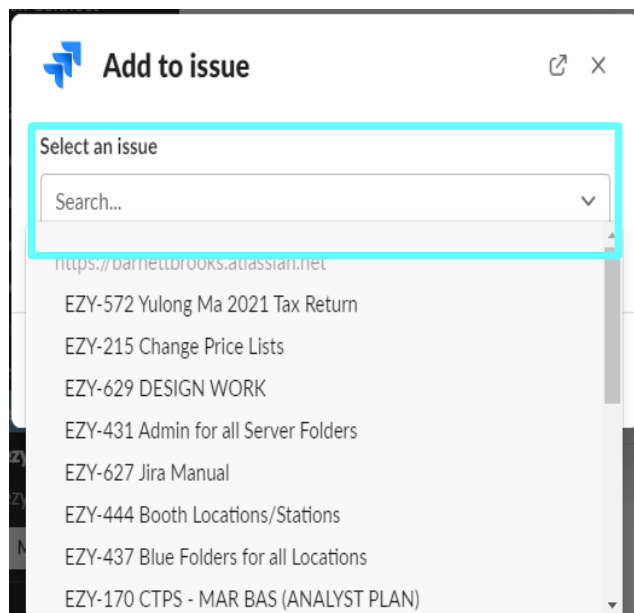
The image shows a screenshot of the 'Jira Cloud for Slack' interface. At the top, there is a header with the Jira logo and the text 'Jira Cloud for Slack'. Below the header, there are several form fields, each highlighted with a colored border:

- Assignee (optional):** A dropdown menu with 'Chloe Friederich' selected. This field is highlighted with a red border.
- Due date (optional):** A date picker with 'Today' selected. This field is highlighted with a yellow border.
- Priority (optional):** A dropdown menu with 'Medium' selected. This field is highlighted with a green border.
- Labels (optional):** A text input field with the placeholder text 'Pick your options or create a new label'. This field is highlighted with a blue border.
- Start date (optional):** A date picker with 'Today' selected. This field is highlighted with a pink border.

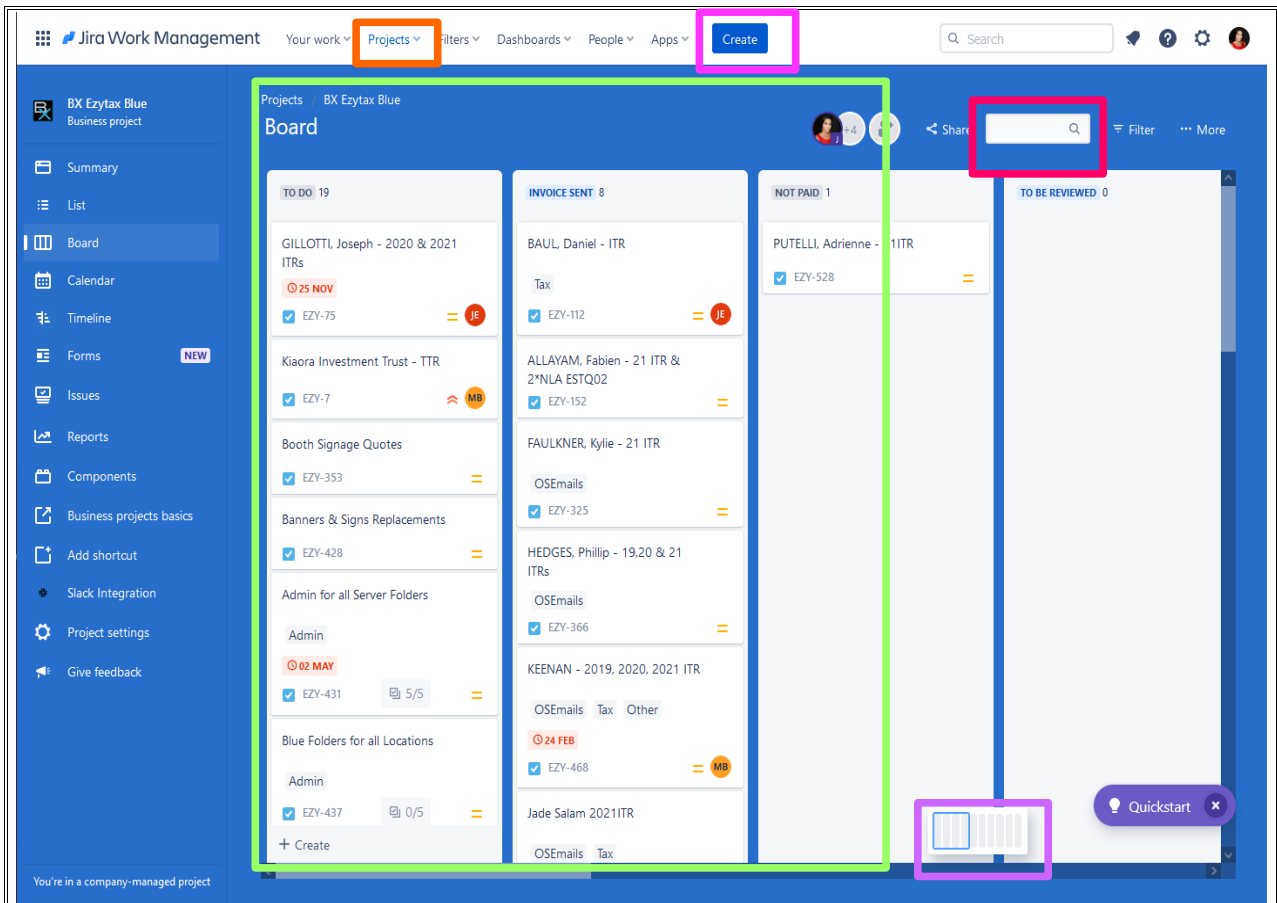
At the bottom right of the form, there are two buttons: a 'Cancel' button and a 'Submit' button. The 'Submit' button is highlighted with a brown border.

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

1. Slack message > 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.



## **CREATE AND WORK WITH ISSUES**



**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 search 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.



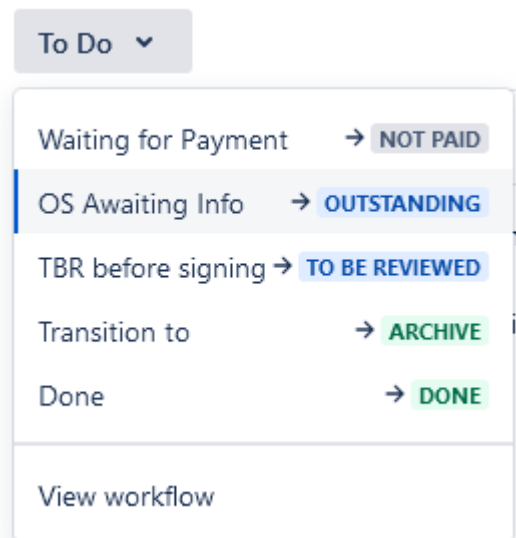
## TRANSITIONING THE ISSUE

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 · 



Chloe Friederich yesterday

21ECCQ400330

Edit · Delete · 



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.

The image shows a screenshot of a software interface. On the left, a context menu is open, listing several actions: 'Log work', 'Connect Slack channel', 'Convert to Subtask', 'Move', 'Clone', 'Delete', 'Actions menu', 'Print', 'Export XML', and 'Export Word'. On the right, the 'Edit work log' form is displayed. It features a progress bar at the top showing '30m logged' and '30m remaining'. Below the bar, it states 'The original estimate for this issue was 1h'. The form includes input fields for 'Time spent' (10m) and 'Time remaining' (30m). A 'Date started' field is set to '5/5/2022' at '2:03 PM'. A text area for 'Work description' contains the text 'tax return done'. At the bottom right of the form are 'Save' and 'Cancel' buttons.

## 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.

Activity

Show: **All** Comments History Work log Slack Integration

- CF** Chloe Friederich changed the Status 19 minutes ago **HISTORY**  
TO BE LODGED → DONE
- CF** Chloe Friederich changed the Status 19 minutes ago **HISTORY**  
ADOBESIGN → TO BE LODGED
- CF** Chloe Friederich added a Comment 19 minutes ago **COMMENTS**  
to be lodged- tax return signed
- CF** Chloe Friederich logged 5m 19 minutes ago **HISTORY**
- CF** Chloe Friederich updated the Remaining Estimate 19 minutes ago **HISTORY**  
35M → 30M

## PROJECTS

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

## Projects

Create project Templates

Search Projects  Jira - business projects x [dropdown]

★ 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		...