Legacy Documentation

Vacation Manager for JIRA [1.2.x]

(For Jira Server, Jira Data Center)

By Transition Technologies PSC

Visit our website: https://ttpsc.com/en/atlassian/ttpsc-apps/

Marketplace: https://marketplace.atlassian.com/vendors/37453/transition-technologies-psc

App documentation: https://psc-software.atlassian.net/wiki/spaces/VMSD/overview

Table of Content:

Vacation Manager for JIRA [1.2.x]

**Vacation Manager
for JIRA**

TABLE OF CONTENTS:

Introduction

- What is Vacation Manager for JIRA

Installation

- Installation on your JIRA Server
- Initial setup after installation

Core Elements

- Navigation Bar Menu
- Vacation Manager Groups and Permissions
- Vacation Manager Project
- Vacation Types
- Vacation Definitions

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Introduction [1.2.x]

What is Vacation Manager for JIRA

Vacation Manager is here to help you, your hr team and all of your employees, to manage vacations in your organization. It is designed to fully integrate with JIRA software, so you can easily use existing configuration without much hassle. By default, Vacation Manager uses as many out of the box JIRA components as possible, so you and your users could have consistent and easy to learn and use interface all over the system.

Integration with JIRA

Besides main and obvious feature: *managing vacations*, the main advantage of Vacation Manager plugin is an integration with JIRA. We wanted to create easy to use plugin for everyone, both regular and management rank users. By doing so, we believe that one way of accomplishing this

step is to use components that JIRA users are already familiar with. So in Vacation Manager we tried to base our functions on JIRAs' core elements that we tweaked to best match our plugin requirements.

Vacation Manager consists of one main JIRA project. Within this project you can create new Vacation Types that will be automatically mapped to new Issue Type in Vacation Manager project. From here, any user in Vacation Manager User Group will be able to create new Vacation Document, that internally will be visible as a normal Issue and will be able to be filtered using JQL functions. Also all changes and actions on that Vacation Document will be logged, just like in any other issue. And on top of that, all of the Vacation Manager groups like HR, Users and Supervisors can also be mapped to your existing groups in JIRA.

Key features

- full integration with existing JIRA and JIRA user groups,
- dedicated groups and permissions for Admins, HR, Supervisors and regular Users,
- customizable one-time and recurring Vacation Types for many custom vacation types,
- automatically created JIRA project that will be used exclusively by Vacation Manager,
- Vacation Documents created and managed just like any other JIRA issues so they can be filtered and searched using standard JQL functions,
- dedicated and easy to use Vacation Document creation screen,
- calendar system for selecting holidays and free days,
- HR management panel and user statistics,
- highly customizable using JIRA permission system and our custom fields, workflow and post functions,
- ...and many more!

Interested? Try trial version!

It's always best to try solution before buying it, so we strongly recommend installing Vacation Manager on your test JIRA instance and checking for yourself what other helpful functionalities Vacation Manager has to offer you. Start it now by checking our installation guide.

Installation [1.2.x]

*Note: Be aware that initializing this plugin will automatically create all necessary Issue Types, Screen Configurations, Workflows, Post-Functions, Schemes and Project that are essential for Vacation Manager integration with JIRA. It is good practice to **create full backup of your JIRA** before installing new plugin.*

You can download and install Vacation Manager just like any other plugin for JIRA, via built-in Atlassian Marketplace. To do this please follow those steps:

1. Log into your JIRA instance as an admin
2. Click the admin dropdown and choose **Atlassian Marketplace**
3. Click **Find new add-ons** from the left-hand side of the page
4. Locate **Vacation Manager for JIRA** via search
5. Click **Try free** to begin a new trial or **Buy now** to purchase new license for **Vacation Manager for JIRA**
6. Enter your information and click **Generate license** when redirected to MyAtlassian
7. Click **Apply license**

*Please keep in mind that currently Vacation Manager for JIRA is NOT compatible with **JIRA Cloud**.*

After installation you are ready to go - you can now initialize Vacation Manager and create your first vacation type.
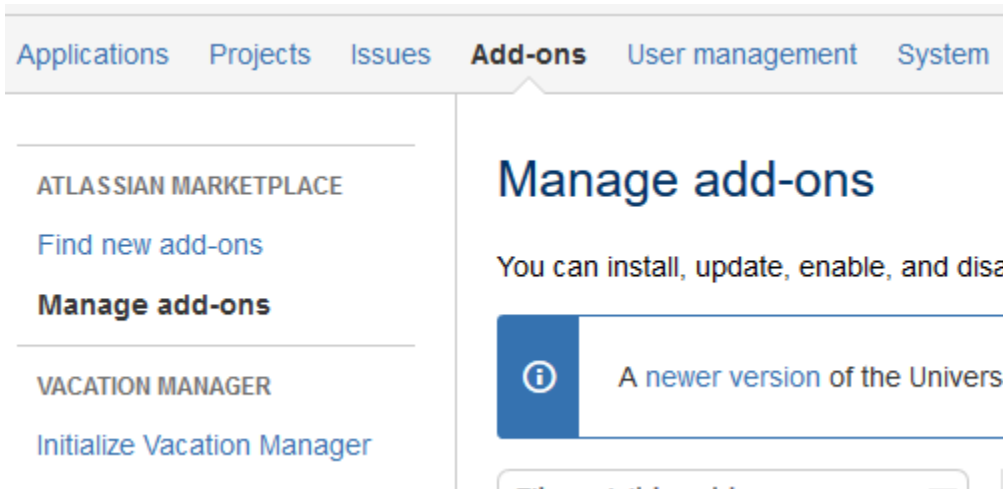
Initial Setup [1.2.x]

After plugin is installed you have to start initialization process. You have to be logged in administrator account first and enter in "Add-ons" view.

There are two ways to do it. Either by clicking **Configuration** button in *Manage add-ons* view (note: button is localized below Vacation Manager plugin name).

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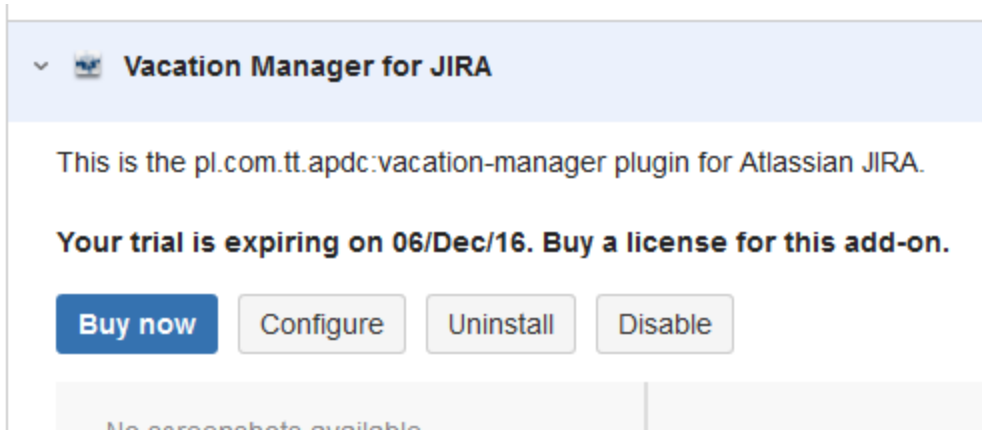
Or by clicking **Initialize Vacation Manager** link in sidebar.

Now you should see first step view to define Vacation Manager project

There are several fields to fill:

- **Name** - required field describing Vacation Manager project name

- **Key** - a project key - that prefixes each issue in the project
- **Description** - field describing Vacation Manager project
- **Lead** - a required field defines Vacation Manager project lead, choosen user should have granted project management permissions.

After clicking on **next** button, group define view should appear

In this step you can define which groups of users will meet individual roles with specific permissions in Vacation Manager. In short, there are three groups:

- **Users** - they can make vacation requests, and manage thier own,
- **Supervisors** - they can approve users requests,
- **HR** - they can manage and grant vacations for users. We do not recommend to use common jira groups like *jira-users*, *jira-administators* etc. to set as groups above.

Here you can read more about **groups and permissions** .

Click **next**, and you should see view to configure first vacation type.

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In the third step you need to define a first Vacation Type.

There are several fields describing Vacation Type:

- **Name** - Vacation Kind name
- **Description** - Description of Vacation Kind
- **Type** - there are two kinds of Vacation Types *recurring* and *one time*
  - **One-time** - choosing this you will have three another field to fill:
    - **Has End Date** - check Yes if you want to Vacation Type has specified end date, check NO if you do not want to
    - **Has Suggested Days** - checking Yes shows field where you can specify suggested days number granted
    - **Suggested Days** - specify days number granted to this Vacation Type (it can be changed later in Vacation Definition configuration)
  - **Recurring** - choosing this you will have fill these field:
    - **Recurring period** - how often Vacation has to start new period
    - **Period start date** - specifies when Vacation Type starts his first period
    - **Next periods** - shows how period will look like
    - **Carryover Days** - defines if unused days will be rewritten to next period
    - **Suggested Days** - specify default days number granted to this Vacation Type every period(it can be changed)

You can read more about Vacation Types in Vacation Type section.

Click **next**. Last view is summary, you can check there if parameters are correct.

Summary

Project ●————● Groups ●————● Vacation kind ●————● Summary

You are about to create Vacation Manager configuration with those data:

Project

Name	Vacation Manager
Key	VACMAN
Project Lead	admin

Groups

Users	vacation-users
Supervisors	vacation-supervisors
HR	vacation-hr

First vacation type

Name	Annual leave
Description	It is paid time off work granted by employers to employees to be used
Type	RECURRING
Period	12 month
Period start date	2016-06-01
Carryover Days	Yes
Has End Date	Yes
Has Suggested Days	Yes
Suggested Days	26

[Previous] [Create] Cancel

Click **create** to create Vacation Manager configuration.

Next Vacation Manager core elements - Navigation Bar Menu [1.2.x]

Navigation Bar Menu [1.2.x]

In JIRA Nav bar has been added Vacation menu. Its appearance depends on the permissions of the account you are logged. More about permissions in **Vacation Manager Groups and Permissions**

If you are logged in on an account, which belongs to users group, you will see this type of menu:
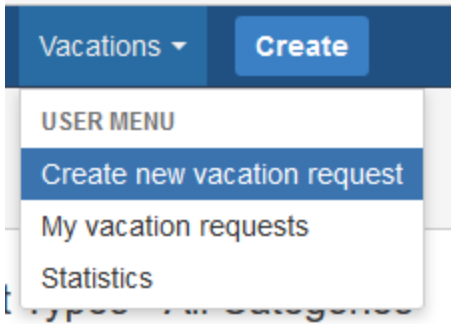
- **Crate new vacation request** - redirect to the page to create new Vacation Document
- **My vacation request** - redirect to the issue view screen with ready JQL filter personalized to user.
- **Statistics** - redirect to the *Statistics* page, where user is able to see his Vacations details.

If you are logged in on an account, which belongs to supervisors group, you will see menu below:
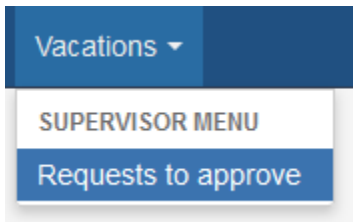
- **Request to approve** - redirect to the page to issue view screen with ready JQL filter set to show documents that require action.

If you are logged in on an account, which belongs to hr group, you will see such menu as the one below:
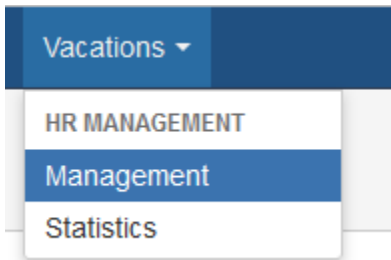
- **Management** - redirect to the *Management* page, where hr user is able to manage Vacations of any user.
- **Statistics** - redirect to the *Statistics* page, where user is able to see Vacation details of any user.

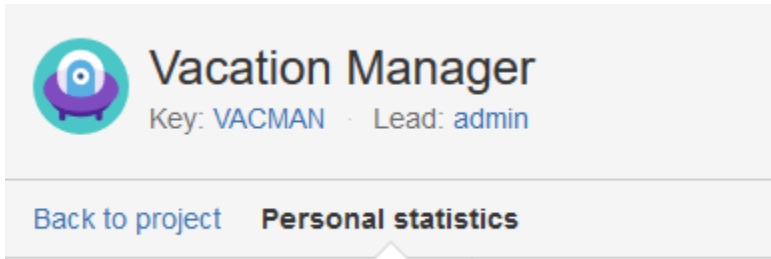If you are logged in, on an account that belongs to many groups, then all of the ranks' options are combined:
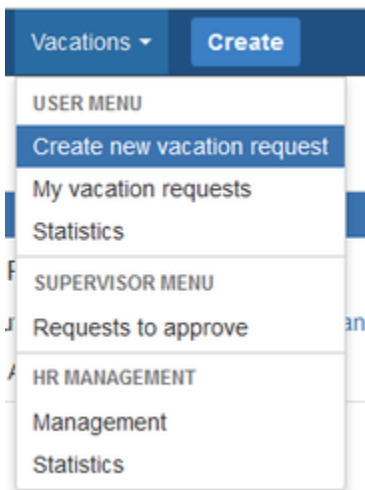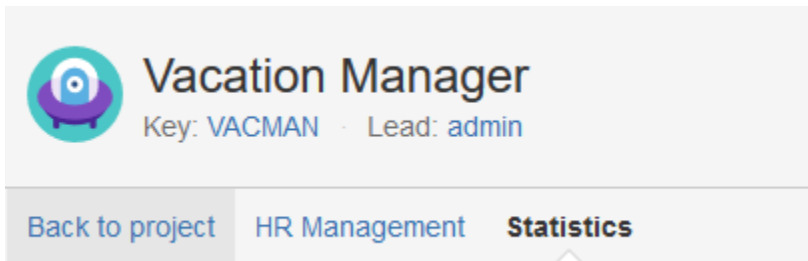
If you enter in some links above that redirect you to Vacation Manager, views you will see navbar for a User rank are to be similar as the one below:
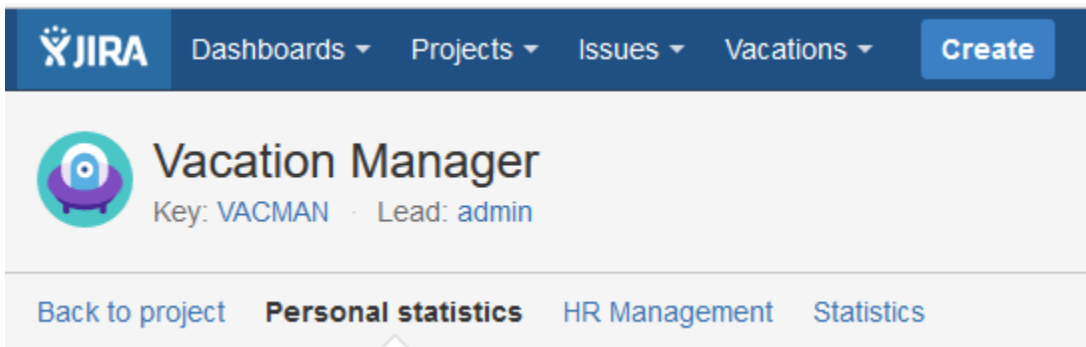

- **Personal statistics** is **Statistics** view from *USER MENU* section

and this navbar for HR

If account you are logged in belongs to users and hr group options are combined

Next Vacation Manager core elements - Vacation Manager Groups and Permissions

Vacation Manager Groups and Permissions [1.2.x]

There are three main groups in Vacation Manager:

- Users Group
- Supervisors Group
- HR Group

Every user can be in one or more groups and will have permissions from every group that he currently is. So every Supervisor or HR can be also in User Groups, so they can also create new Vacation Resuest.

All these groups are mapped to existing groups in JIRA. After setting them first time during Initial Setup you can change it later in plugins Admin Configuration.

Vacation Manager internally uses also fourth group - Admins. This group can't be configured directly in plugin settings, as all admins are getting directly from your JIRA admin list.

Users Group

Main group for end users that can create new Vacation Documents (send new vacation requests).

User can:

- create new Vacation Document for selected Supervisor (but not himself),
- edit or delete his own Vacation Documents before sending it to Supervisor,
- send his Vacation Documents to Supervisor,
- browse only his Vacation Documents,
- access *User Menu* in Navigation Bar Menu and its functions,
- view his vacation statistics.

You can get more information for this group in Users Documentation section.

Supervisors Group

Group that users can send to Vacation Documents and accept/reject them.

Supervisor can:

- approve or reject users Vacation Document,
- request more info from user to his Vacation Document,
- cancel approved Vacation Document,
- access *Supervisor Menu* in Navigation Bar Menu and its functions,
- browse Vacation Documents that he is assigned for and are waiting for approve or reject.

You can get more information for this group in Supervisors Documentation section.

HR Group

Users in *human resources* group can manage

HR can:

- add and edit Vacation Definitions (vacation days available) for users in User Group,
- add and edit new holidays and free days in calendar,
- view vacation statistics for any User and any Vacation Kind,
- view all Vacation Documents for every user,
- edit Vacation Documents for other users (but only before sending it to Supervisor and accepting/rejecting it),
- if HR user is also in Users Group - he can create new Vacation Documents for other Users,
- access *HR Management Menu* in Navigation Bar Menu and its functions,
- add/remove users in Users and/or Supervisors groups (this can be disabled by admin in Admin Configuration panel).

Please keep in mind that giving permission to manage Users/Supervisors group and using existing JIRA groups can lead to potential security threat. If you don't want HR users to modify Users/Supervisors groups please disable this option in Admin Configuration for one, or both groups.

You can get more information for this group in HR Documentation section.

Admins

Admin users that are also admins in your JIRA.

Admin can:

- change configuration of plugin in Admin Configuration panel,
- add and remove Vacation Kinds in plugin.

You can get more information for this group in Admins Documentation section.

Technical details

Groups in Vacation Manager are connected to standard JIRA groups and are used in *VACMAN Notification Scheme*, *VACMAN Permission Scheme* and *VACMAN Issue Security Scheme*.

Supervisors Group is also used in *Supervisor* User Picker custom field on *VACMAN Screens*.

Next Vacation Manager core elements - Vacation Manager Project

Vacation Manager Project [1.2.x]

After initialization Vacation Manager will create project dedicated for storing Vacation Documents. You can choose name, key and lead user for this project in first step of Initial Setup.

Technical details

As *Vacation Manager Project* is standard JIRA project it also have all mandatory for JIRA project schemes and workflow: *VACMAN Workflow Scheme* with *Vacation Manager Workflow*, *VACMAN Field Configuration Scheme*, *VACMAN Permission Scheme*, *VACMAN Issue Security Scheme*, *VACMAN Issue Type Scheme* and *VACMAN Notification Scheme*.

Next Vacation Manager core elements - Vacation Type

Vacation Type [1.2.x]

Vacation Type in Vacation Manager are mapped to JIRA Issue Type and can be chosen by User when creating new Vacation Document, just like any other Issue Type.

Vacation Type globally holds properties and describes details of vacation, and can be added or removed from system only by Admin.

You can get more information about available types and properties of Vacation Types in Managing Vacation Types section.

Technical details

After creating new Vacation Type, Vacation Manager automatically creates new Issue Type with same name and connects it to *VACMAN Issue Type Scheme* used by Vacation Manager Project.

Next Vacation Manager core elements - Vacation Definition

Vacation Definition [1.2.x]

Vacation Definition are structures that tells Vacation Manager when and how many days of vacation user can take for selected Vacation Kind. They can be assigned to user by HR via HR Management menu. In case of recurring Vacation Type, Vacation Definition can be granted once for every users, then next definitions will be automatically created for every new period (default: every year). Vacation Definition contains information like entitled days, start/end date when definition will be available for user.

Annual Leave type vacation details

| | User | John Brown | | Vacation type | RECURRING |
| | Day limit | 20 | Edit | Period | 12 MONTH |

	Period start date	Period end date	Days	Actions
CURRENT	2016-01-01	2016-12-31	Entitled: 20 Carryover: 0 Used: 0	Edit
FUTURE	2017-01-01	2017-12-31	Entitled: 20 Carryover: 0 Used: 0	Edit
NEW	2018-01-01	2018-12-31		Add new

Check approved documents belong to these periods...   Back

Next Vacation Manager core elements - Vacation Document

Vacation Document [1.2.x]

Vacation Documents (or vacation request) are user requests for new vacation. By default Vacation Document is visible only for user that created it and users from HR group. When user completes creation of Vacation Document, then he can send it to selected supervisor. After that Document will be visible also for supervisor who can accept, reject it or send back to user for more information.

It can be created from default new Issue creatin screen in JIRA by selecting Vacation Manager project, or by selecting *Create new vacation request* from Navigation Bar Menu.
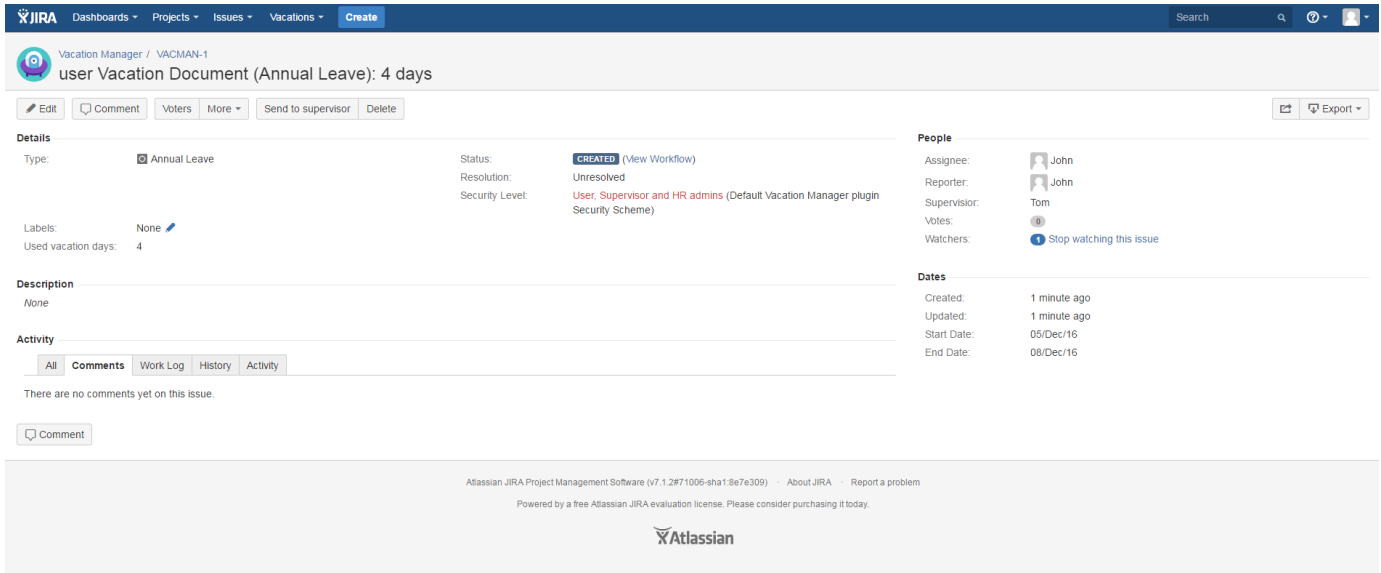
Vacation Document Creation screen

On creation screen user can select essential details about vacation that he want to request: Vacation Type, start and end date, supervisor to which request will be send and optionally details.

By default *Summary* field is hidden for Vacation Manager project and is autofilled with values configured in Admin Configuration panel, but it can be enabled back by admin in plugin configuration.

HR users can also create new document for other user by selecting user in *Reporter* field.
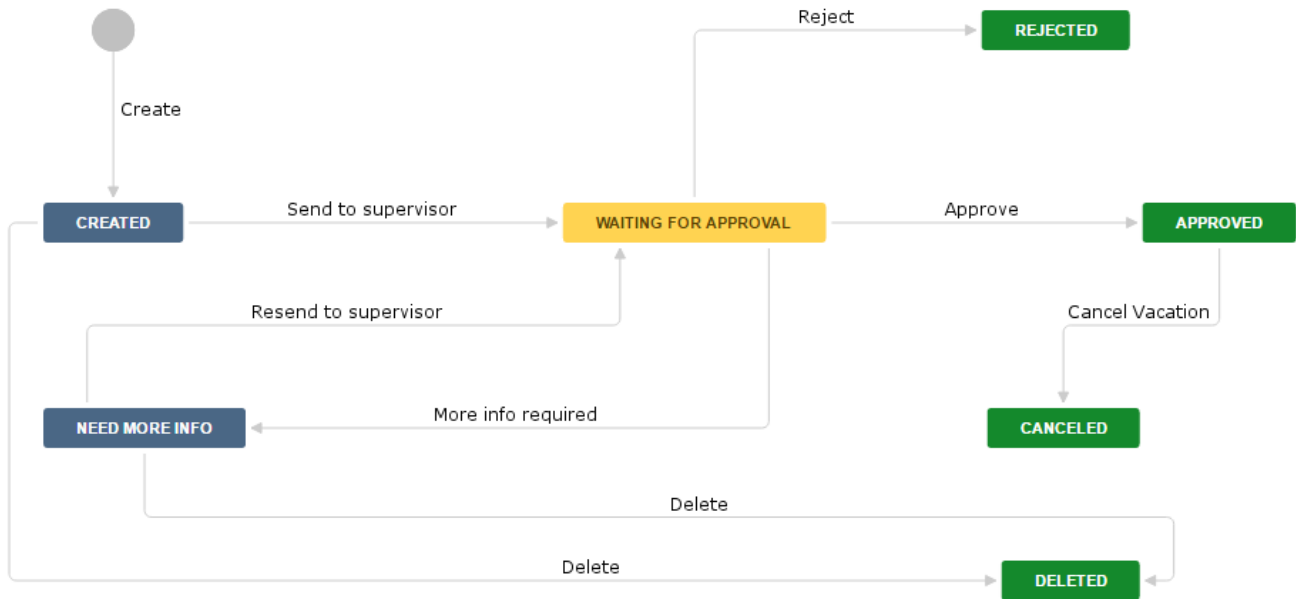
Vacation Document screen

After document creation user will be able to see details of his Vacation Document:

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Here he can edit his Vacation Document or perform actions like sending it for supervisor. This screen is also available for every HR user and for supervisor (after sending document for him). On this screen also supervisor will be able to accept, reject request or send back to user for more information.

Supervisor can display all Vacation Documents waiting for his approval by selecting *Requests to approve* from Navigation Bar Menu.

Vacation Document Workflow

Technical details

Every Vacation Document is standard Issue in JIRA that uses Issue Types created by Vacation Manager and *Vacation Manager Workflow* workflow.

Next Vacation Manager admin configuration - Admin Configuration

Admin Configuration [1.2.x]

This section allows the JIRA administrator manage the Vacation Manager configuration.

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It contains three sections **Configure Vacation Manager** where administrator is able to change:

- **Auto-summary** - option allows to hide the summary field in Vacation Document creation views. Summary will be hidden and filled automatically by value defined in **Auto-summary text** field.
- **Auto-summary text** - field defines how will be generated the summary field value. To describe it you can yse special variables:
    - *reporter* - represents reporter of issue,
    - *supervisor* - represents a supervisor chosen by reporter while creating issue,
    - *startDate* - represents date when vacation starts,
    - *endDate* - represents date when vacation ends,
    - *vacationDays* - represents days count used by vacation,
    - *vacationType* - represents vacation type - *recurring* or *one time*,
    - *details* - represents additional details entered when creating a vacation document.
- **HR manage users** - option allows for users from HR group modify users in user group defined in vacation manager. As the groups in Vacation Manager are real jira groups, so HR has privileges to modify them. Normally only administrators can manage groups,
- **HR manage supervisor group** - as above but allows to modify users in supervisor group,
- **Recalculate vacation hours** - in Vacation Manager all recurring type vacations are extended by the end of the period, and if carry over option is selected the unused days will be rewritten to next period. So this option specify when such actions will be executed.

Second sections presents which groups are defined in Vacation Manager, by click *Edit groups* administrator will see next view to change these groups.

For each group type administrator is able to change it value. More about groups **Vacation Manager Groups and Permissions**

Create new schemes option specifies if actual schemes(e.g. permission, notification) in Vacation manager project will overwritten by new created or not. If the option NO is selected old schemes with old groups will remain assigned to project and administrator should modify them yourself, if option YES is selected new schemes will be created and assigned to project but these schemes do not base on old ones, it will be basic Vacation Manager schemes without any changes provided by user in previous schemes. Previous schemes will not be deleted administrator should do it yourself.

Third one "Delete data" is deleting Vacation Manager data, if you use button inside this section it will delete all Vacation Configuration data but it will not delete components created by Vacation Manager in JIRA, administrator has to it himself. Before deleting data warning window appears to confirm this action.
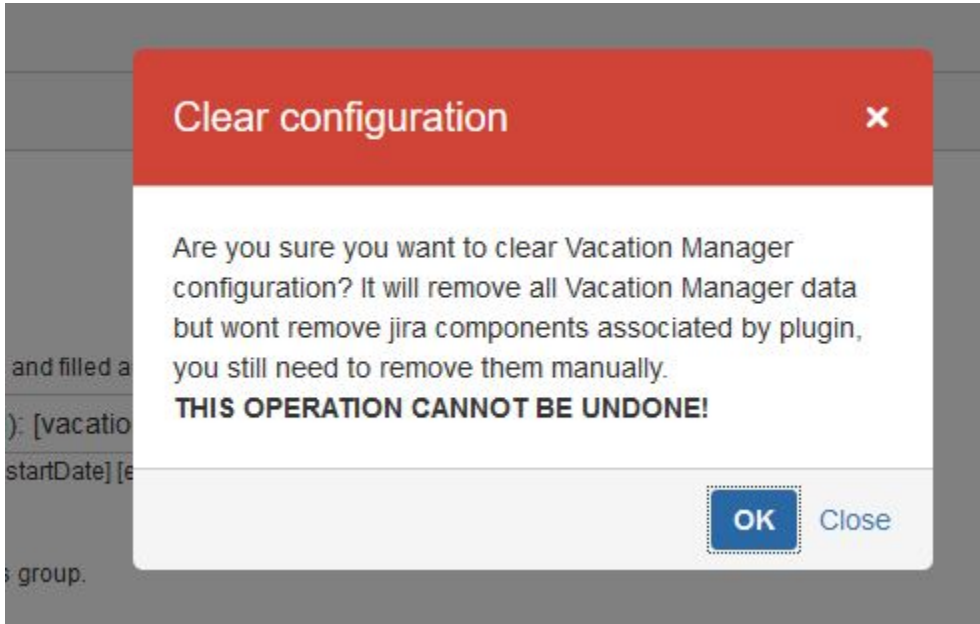
As it communicates **THIS OPERATION CANNOT BE UNDONE!**

Next Vacation Manager admin configuration - Managing Vacation Types

JIRA Integration Elements [1.2.x]

Vacation Manager at Initial Setup creates standard JIRA Project so it can use it as a container for Vacation Documents. Due to this approach Vacation Manager also creates all JIRA project configuration elements to work properly. Below is a list of configuration elements that are created at Initial Setup.

Note: those elements, just like all Vacation Docuemnts and Vacation Manager Project, are left intact after plugin uninstallation.

- **Vacation Manager Project** - main project with name and key as typed in first Initial Setup screen,
- **Issue types** - Issue types for every Vacation Type you created in Vacation Manager,
    - **Issue type schemes** (VACMAN Issue Type Scheme) - all Vacation Manager Issues are connected to this scheme,
- **Workflows** (Vacation Manager Workflow) - default workflow for Vacation Manager issues (Vacation Documents),
    - **Workflow schemes** (VACMAN Workflow Scheme) - workflow scheme that connects Vacation Types (Issue Types) with Vacation Manager Workflow,
- **Screens** - VACMAN Screen Create/View/Edit - screens connected to Vacation Manager screen field scheme; VACMAN Comment screen - connected to Vacation Manager workflow (More info required transition),
    - **Screen schemes** (VACMAN Screen Field Scheme) - connects Vacation Manager issue type scheme with create/edit/view screen fields schemes,
    - **Issue type screen schemes** (VACMAN Issue Type Scheme) - connects Vacation Manager Issue types to Project,
- **Custom fields** (Details, End Date, Start Date, Statistics, Supervisor, Used vacatiom days) - custom fields used by Vacation Manager,
    - **Field Configurations** (VACMAN Field Configuration) - default field configuration with Vacation Manager field configuration scheme,
    - **Field configuration schemes** (VACMAN Field Configuration Scheme) - connects Vacation Manager project with field configuration,
- **Issue security schemes** (VACMAN Issue Security Scheme) - default security scheme with security level for Assignee, Reporter and HR Group,
- **Notification schemes** (VACMAN Notification Scheme) - notification scheme for sending emails after specified operations,

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- **Permission schemes** (VACMAN Permission Scheme) - permissions for Vacation Manager groups.

Next Vacation Manager HR Management - User and Supervisors Management

Managing Custom Fields [1.2.x]

Since version 1.1.0 you can manually change custom fields that are used by Vacation Manager plugin. You can view and edit these fields in *Cust om Fields* section in Vacation Manager *Configure* panel.

It is strongly recommended to keep default fields created by Vacation Manager and modify them only when there is no defined mapping for any field type.

Version 1.1.0 upgrading warning: After upgrade you must manually create User Picker custom field and map it to *Coverage person* field. You can get more information about upgrade in *updating to 1.1.0 section*.

Custom Fields

Chart	Statistics
Comment	Details
Start date picker	Start Date
End date picker	End Date
Supervisor field	Supervisor
Coverage person	Coverer
Used vacation days	Used vacation days

✎ Edit fields

Custom fields used by Vacation Manager

- *Chart* - displays statistics in pie chart with selected and available vacation days.
- *Comment* - text input field contains comment from reporter.
- *Start/End date pickers* - date pickers where user can select start and end dates of absence. These fields are used internally for calculating used days.
- *Supervisor field* - single user picker with supervisor selected by reporter. Supervisor will be able to review and accept vacation request. After manually editing this field you must configure this field to filter only users from Supervisors group.
- *Coverer* - single user picker, contains information about coverage person on reporters absence.
- *Used vacation days* - number field with vacation days used by vacation request. This field is automatically calculated.

Managing Vacation Types [1.2.x]

Available Vacation Types

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As an admin you can display all available Vacation Types using *Manage Vacations Types* tab located in *JIRA Administration Add-ons Manage Vacations Types*. All Vacation Types will be available for user to choose from on Vacation Document creation screen.

Deleting Vacation Types

To delete *Vacation Type* simply click *Delete* button near chosen *Vacation Type* you want to remove. Please note that this operation will delete all data for that Vacation Type form database and remove Issue Type from *VACMAN Issue Type Scheme*. However Issue Type and all Issues created for this Vacation Type will be left intact.

Adding new Vacation Type

You can add new Vacation Type from *Available Vacation Types* screen using *Add new Vacation Type* button.

Currently there are two main types you can create: *One time* and *Recurring* Vacation Types.

One time

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- **Name** - name of Vacation Type that will be visible for users. This name will be assigned for newly created Issue Type,
- **Description** - description of Vacation Type,
- **Has End Date** - defines if Vacation Definitions created for this Vacation Type will have expiration date,
- **Has Day Limit** - if Vacation Definitions will have fixed number of days that user can take,
- **Suggested days** - only active when **Has Day Limit** is checked, specifies default amount of days for Day Limit. This value later acts as suggest only, as HR can completely change it when creating new Vacation Definitions.

Example:

- Leave of absence - no end date and no day limit (there will be no limits for taken days or number of vacation requests),
- Parental leave - has end date (when assigning new Vacation Definition to user, HR will be able to choose end day until when vacation days will be available), has day limit, and suggested days will be set to 14 days.

Recurring

Add new vacation type

Name*	
	Max. 60 characters.
Description	Issue Type description here....
Type	○ One time
	◉ Recurring
Recurring period	every year ▼
Period start date	yyyy-mm-dd
Next periods	N/A
	Preview of next periods since today
Carryover Days	◉ Yes
	○ No
	Defines if days not used in actual period has to be rewrited to next ones.
Suggested Days	None ▲▼
	Number of days in periods.

Add   Cancel

- **Recurring period** - defines period length,
- **Period start date** - defines start month and day of period (year is omitted), eg. standard Annual Vacation will have recurring period of 1 year, period start date set to first January,
- **Next periods** - preview of upcoming period dates for selected selected *Recurring period* and *Period start date*,
- **Carryover days** - specifies if unused days from one period should be added to next period,
- **Suggested days** - just like in *One time* type, this field specifies default days for HR, when adding new Vacation Definition to user.

Example:

- Annual Leave - yearly vacation period, 01/01 as period start date, enabled carry over days (so unused days will be available in next year), 20 days for suggested days of vacation.

Next Vacation Manager admin configuration - JIRA Integration Elements

User and Supervisors Management [1.2.x]

These views in HR management section, allows users of HR group modify users in supervisors and users groups.

Users presents and allows to modify users of group users.

| Back to project | Personal statistics | **HR Management** | Statistics |

Vacations
Holidays
Users
Supervisors

Manage Users

Add new users

[User names] [icon] [Add]
Separate multiple usernames using comma

Active users (41)

Show [10] entries   Filter...

Full name ↑	Username	Email	Actions
Acklpwyk Jqzwqbhj	ajqzwqbhj	ajqzwqbhj@localdomain.com	Remove
admin	admin	admin@admin.com	Remove
Angelo Jones	angelo.jones	Angelo.Jones@fake.expium.info	Remove
Anthony Zimmerman	anthony.zimmerman	Anthony.Zimmerman@fake.expium.info	Remove
Bpralriu Xiqlemgj	bxiqlemgj	bxiqlemgj@localdomain.com	Remove
Charles Goodman	charles.goodman	Charles.Goodman@fake.expium.info	Remove
Cmrodtaa Tlgafqbp	ctlgafqbp	ctlgafqbp@localdomain.com	Remove
David Castro	david.castro	David.Castro@fake.expium.info	Remove
David Lake	david.lake	David.Lake@fake.expium.info	Remove
Dgvpfzyp Wcfclgsb	dwcfclgsb	dwcfclgsb@localdomain.com	Remove

Showing 1 to 10 of 41 entries   Previous 1 2 3 4 5 Next

Supervisors presents and allows to modify users of group supervisors.

| Back to project | Personal statistics | **HR Management** | Statistics |

Vacations
Holidays
Users
Supervisors

Manage Supervisors

Add new supervisors

[User names] [icon] [Add]
Separate multiple usernames using comma

Active users (11)

Show [10] entries   Filter...

Full name ↑	Username	Email	Actions
admin	admin	admin@admin.com	Remove
Angelo Jones	angelo.jones	Angelo.Jones@fake.expium.info	Remove
Anthony Zimmerman	anthony.zimmerman	Anthony.Zimmerman@fake.expium.info	Remove
Charles Goodman	charles.goodman	Charles.Goodman@fake.expium.info	Remove
David Castro	david.castro	David.Castro@fake.expium.info	Remove
David Lake	david.lake	David.Lake@fake.expium.info	Remove
Donald Verdugo	donald.verdugo	Donald.Verdugo@fake.expium.info	Remove
Elmer Harris	elmer.harris	Elmer.Harris@fake.expium.info	Remove
Eric Bates	eric.bates	Eric.Bates@fake.expium.info	Remove
Gary Negron	gary.negron	Gary.Negron@fake.expium.info	Remove

Showing 1 to 10 of 11 entries   Previous 1 2 Next

In both views HR user is able to check users that belongs to group, and delete them from group by clicking *Remove* button assigned to each user.

By clicking *Add* button HR user can add new user to this group. To specify users to add click users icon [icon] that invoke a dialog where HR user choose users you want to add, or just type username in text field if user exists it will be added.

Each table has option to show different numbers of rows, filtering by provided text, and pagination.

Next Vacation Manager HR Management - Managing holidays and workdays

Managing holidays and workdays [1.2.x]

HR users can define new days that will not count to used days when creating new Vacation Document. Every new created holiday can be defined as one time only or yearly, or in case of workdays - days of week week.

You can access this panel as HR User from *Navigation Bar Menu* Management Holidays

Workdays

Workdays

☐ Sunday ☑ Monday ☑ Tuesday ☑ Wednesday ☑ Thursday ☑ Friday ☐ Saturday   Update workdays

You can choose what days of week will be marked as workdays. Every unchecked day will be NOT counting to used days for user.

After any changes you need to click *Update workdays* button to apply then to system. By default every day of week is set as workday except Saturday and Sunday.

Holidays

Holidays
Click on any calendar day to add new holiday. Click on holiday label to remove it.

« <   December 2016   > »   today

Sun	Mon	Tue	Wed	Thu	Fri	Sat
27	28	29	30	1	2	3
4	5 National holiday	6	7	8	9	10
11	12	13	14	15 Day off for everyone	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31
1	2	3	4	5	6	7

You can set holiday days that will be not counting to used days, just like unchecked workdays. This time you can choose if new holiday will be repeating every year or only once, for selected day.

Adding new holiday

To add new holiday you must click on desired day on calendar and then fill up its name and choose holiday type: **One time** - *for selected year only,* **Yearly** - for all years in selected day.

Removing existing holiday

To remove holiday, simply click on it on calendar and confirm your selection in confirmation window.

Next Vacation Manager HR Management - Managing Vacation Definitions

Managing Vacation Definitions [1.2.x]

Management view in HR section allows user to manage vacation types of each user. Provided table allows to set number of rows, filtering by text and paging data.

To start manage user vacations at first HR user has to choose *Vacation type* in top left corner of table

Manage Vacation Definitions

Vacation type Annual leave ▼

Show 10 ▼ entries

☐ **Full name** ↑ **Username**

now the users table will refresh and show basic selected type vacation information of each user.

☐	🏳 Anthony Zimmerman	anthony.zimmerman	Anthony.Zimmerman@fake.expium.info	26	0	Details	Add Vacation
☐	🏳 Bpralriu Xiqlemgj	bxiqlemgj	bxiqlemgj@localdomain.com	N/A	N/A	Details	Add Vacation

To define new Vacation definition HR user has to use *Add vacation* button associated with user, or select checkboxes at left from user names, then *Add to selected* option will be enabled.

Filter...

Add to selected (5)

Details **Add Vacation**

Depending on the selected *Vacation type* you will be redirected to Vacation definition view with different fields enabled for Vacation type. Visit **Adding Vacation definition**.

NOTE: *Add vacation* button is disabled if selected is recurring vacation type and user has defined Vacation definition for this vacation type. Recurring vacation types could have associated only one definition and it will be renewed automatically when period ends.

To view details of user vacation definition click *Details* button associated with each user. You will be redirected to view dedicated to selected vacation type. Visit **Vacation definition detailed view**.

NOTE: *Details* button is disabled if user has no defined vacation definition for selected vacation type.

Next Vacation Manager HR Management - Adding Vacation definition
Adding Vacation definition [1.2.x]

Depending of the enabled field in Vacation type this view generates different fields to fill. More about types Managing Vacation Types.

To add a vacation definition to selected users, you need to fill required fields. In both vacation types it will be:

- **Start date** - enter here start date of vacation period.
- **Days** - enter here number of days for periods.

There is another disabled field for recurring vacation type **End of first period** it is an information when period will end. This value is calculated based on period chosen during creating vacation kind.

Add vacation definition

Definition details

Vacation type* ◉ Annual leave

Start date* 2016-12-02

End of the first period 2016-12-31

Days* 26

[Add] Cancel

You are about to edit those users...

Full name	Username	Entitled days	Carryover days	Used days
Acklpwyk Jqzwqbhj	ajqzwqbhj	0	0	0
admin	admin	0	0	0
Angelo Jones	angelo.jones	0	0	0
Anthony Zimmerman	anthony.zimmerman	0	0	0

And for one time vacation type is a **Valid through** field, enter there a date when the vacation is to be available.

Add vacation definition

Definition details

Vacation type* ◉ Parental leave

Start date* [yyyy-mm-dd]

Valid through* [yyyy-mm-dd]

Days* [4]

Add Cancel

You are about to edit those users...

Full name	Username	Entitled days	Carryover days	Used days
Acklpwyk Jqzwqbhj	ajqzwqbhj	0		0
admin	admin	0		0
Angelo Jones	angelo.jones	0		0
Anthony Zimmerman	anthony.zimmerman	0		0
Bpralriu Xiqlemgj	bxiqlemgj	0		0

Click add to add definition.

Below you can click *You are about to edit those users...* this link shows to what users you are trying to add definition.

Next Vacation Manager HR Management - Vacation definition detailed view

Vacation definition detailed view [1.2.x]

Detailed views of each Vacation type are a bit different.

First view is *One time* vacation type. At the top are basic information about this Vacation definition as user, vacation kind and day limit. Below is a list of period assigned to this user and this vacation type placed in a table. Table is sortable by each header. Each element of list presents a entitled Vacation to user, date scope and number of entitled and already used days. Below whole table there is *Check approved documents belong to these periods...* link, it lists all documents form these Vacations approved for this user.

Parental Leave

	User	Alice Lemoine	Vacation type	ONE-TIME	Suggested Days	Yes

	Start date	End date	Entitled days	Used days	
CURRENT	2016-11-01	2016-12-31	4	0	Edit
PAST	2016-10-01	2016-10-31	2	0	Edit
FUTURE	2017-01-01	2017-02-28	4	0	Edit

Check approved documents belong to these periods...   Back

Each one vacation is editable. When you click *Edit* button, dialog with editable fields will appear. You are able to edit date scope and entitled days for user.

Edit period

Start date	2017-01-01
End date	2017-02-28
Entitled days	4
Used days	0

Save   Cancel

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Another option is view for *Recurring* vacation type. It is quite similar to recent view with some differences. At the top of view you will see selected user and vacation type but day limit field is editable and period field.

- **Suggested Days** - in recurring vacation type it is default number of days entitled to user in every period.
- **Period** - informs how long period is set for this vacation type.

Below there is a table with listed periods, and the last row is an example next period.Below whole table there is *Check approved documents belong to these periods...* link, it lists all documents form these Vacations approved for this user.

Annual leave type vacation details

User Glenna Rosy

Vacation type RECURRING

Suggested Days 26 Edit

Period 12 MONTH

	Period start date	Period end date	Days	Actions
CURRENT	2016-11-01	2016-12-31	Entitled: 26 Carryover: 0 Used: 0	Edit
FUTURE	2017-01-01	2017-12-31	Entitled: 26 Carryover: 0 Used: 0	Edit
NEW	2018-01-01	2018-12-31		Add new

Check approved documents belong to these periods...   Back

By clicking *Add new* button you will see new dialog

Add recurring period

ⓘ Recurring period will be created based on last period in list.

Period start date   2018-04-01

Period end date   2019-03-31

Entitled days   26

Define entitled days number in new period.

Add   Cancel

By filling following fields and clicking add you will add new period before it will be done automatically(if you do this, jira job wont crate another in the same date scope). You can not define date scope of recurring period.

In editing recurring period you are not able to change date scope of period.

Click *Save* to save changes.

Next Vacation Manager HR Management - HR Statistics

HR Statistics [1.2.x]

Vacation Manager have two built in types of statistics for HR users: statistics by User and by Vacation Type. Both can ba accessed from *Navigation Bar Menu* HR Management Statistics.

Additionally you can use built in JIRA Issues search/filtering, as Vacation Manager uses Issues as Vacation Document.

Statistics by Vacation Type

Vacation Manager
Key: VACMAN · Lead: admin

Back to project Personal statistics HR Management **Statistics**

By Vacation Kind
By User

Statistics by Vacation Kind

Vacation kind   Annual Leave ▾

For period   2016-01-01 - 2016-12-31 ▾

Filters   Add filter ▾   Available days < 30 ⊗   Used days < 10 ⊗

Show 10 ▾ entries

Full name ↑	Username	Start date	End date	Available Days	Carryover Days	Used Days	Vacation documents
admin	admin admin@admin.com	-	-	-	-	-	-
Ambroise Edmund	Ambroise Edmund AmbroiseEdmund@wp.pl	-	-	-	-	-	-
Angel Dan	Angel Dan AngelDan@wp.pl	-	-	-	-	-	-
hr	hr hr@hr.pl	-	-	-	-	-	-
Nechtan Nestor	Nechtan Nestor NechtanNestor@wp.pl	01/Dec/16	31/Dec/16	20	0	0	-
Nikephoros Mateo	Nikephoros Mateo NikephorosMateo@wp.pl	01/Dec/16	31/Dec/16	20	0	0	-
Plinius Rade	Plinius Rade PliniusRade@wp.pl	-	-	-	-	-	-
Ranald Kekoa	Ranald Kekoa RanaldKekoa@wp.pl	-	-	-	-	-	-
~~Reinhard Fabianus~~	~~Reinhard Fabianus~~ ReinhardFabianus@wp.pl	01/Dec/16	31/Dec/16	26	0	0	-
Slamet Noboru	Slamet Noboru SlametNoboru@wp.pl	-	-	-	-	-	-

Showing 1 to 10 of 14 entries   Previous **1** 2 Next

Here you can get all Vacation Definitions with their data for users by Vacation Type and selected start/end dates. You can get information like:

- list of all Vacation Definitions for every User,
- all Vacation Documents for Vacation Definitions,
- available, carryover and used days for Vacation Definitions.

Additionally you filter and sort rows by selected columns.

Statistics by User

Vacation Manager
Key: VACMAN · Lead: admin

Back to project   HR Management   **Statistics**

By Vacation Kind
By User

Statistics by User

User	user ▾
From	2016-12-01
To	2016-12-31

Choose from-to dates to show all assigned vacations for selected user

Statistics for user (user) for period: 2016-12-01 to 2016-12-31

Annual Leave	3 day(s)
Sickness Leave	
Maternity Leave	
Parental Leave	1 day
Educational Leave	
Caring Leave	
Compassionate Leave	

| 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 | 13 | 14 | 15 | 16 | 17 | 18 | 19 | 20 | 21 | 22 | 23 | 24 |

December 2016

Vacation kind: Annual Leave

Start date	End date	Available Days	Carryover Days	Used Days	Vacation documents
2016-01-01	2016-12-31	17	0	3	1 document(s)

● Available days
● Used days

3
17

Vacation kind: Sickness Leave
None

Here you can get statistics of all Vacation Types for chosen user and from/to dates. You can get information like:

- graphical timeline of user used days (you can use mouse scroll to zoom in/out and drag to move zoomed view),
- list of all Vacation Definitions for every Vacation Type,
- all Vacation Documents for Vacation Definitions,
- available, carryover and used days for Vacation Definitions.

JIRA issues filter using JQL

Due to fact that every Vacation Document is JIRA Issue you can also user built in JIRAs Issue search with JQL functionality, selecting Vacation Manager Project. For more info please refer to Atlassian JIRA Searching manual.

Next Vacation Manager Supervisor - Processing submitted Vacation Documents

Processing submitted Vacation Documents [1.2.x]

Displaying list of Vacation Documents waiting for your action

As supervisor you need to review and process all incoming Vacation Document that are assigned to you. To check all your pending Vacation Documents go to *Navigation Bar Menu* Supervisor Menu Requests to approve.

From this screen you will be able to perform actions on selected Vacation Document.

Processing selected Vacation Document
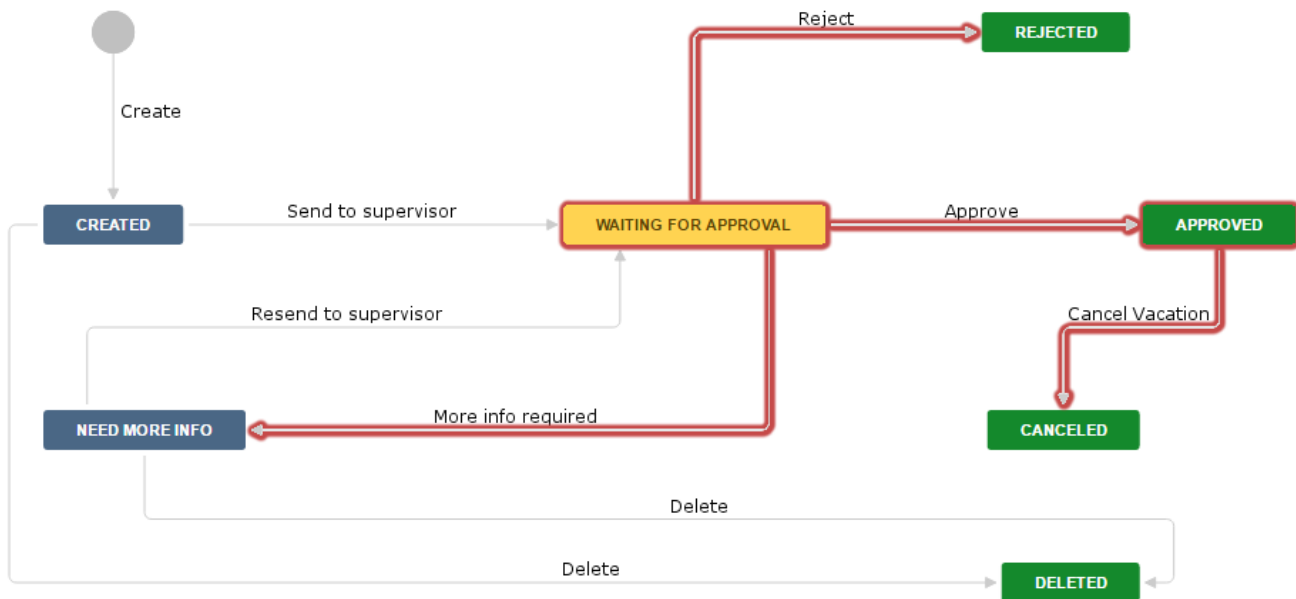
As highlighted on workflow attached above, Supervisor have access to two states in Vacation Document:

- **Waiting for approval** - from here Supervisor can:
    - **Approve** - approves vacation request,
    - **Reject** - rejects vacation request,
    - **More info required** - send vacation document back to User for more info/correction. Supervisor comment is required on this step,
- **Approved** - after accepting document:
    - **Cancel Vacation** - cancels document and returns all reserved vacation days for user.

Next Vacation Manager User - Request user vacations

Request user vacations [1.2.x]

To create new Vacation request click *Create* button on JIRA navbar or *Create new vacation request* depend of the view you are dialog box will appear or you will be redirected.

If you were redirected at first select vacation type you want to create.

Create Vacation Document

Project*   Vacation Manager (VACMAN)

Vacation Type*   Annual leave

Next   Cancel

after that you will see a create document view. If dialog box appear view is similar, but user can change project and vacation type.

Create Vacation Document
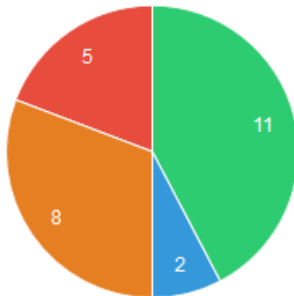
Project	**Vacation Manager**
Vacation Type	☉ **Annual leave**
Supervisior*	[ ] 👥

Start typing to get a list of possible matches.

Statistics

- 🟢 Available days
- 🔵 Chosen days
- 🟠 Reserved days
- 🔴 Used days

(pie chart: 5, 11, 8, 2)

Showing data for period: -

Start Date*	28/Dec/16 📅
End Date*	29/Dec/16 📅
Details	[ ]

[Create] Cancel

After creating document review it and send using **Send to supervisor** button

To create new request you have to fill some obligatory fields:

- **Supervisor** - select an supervisor user who is responsible for accepting your vacations,
- **Start date** - select a date when vacation starts,
- **End date** - select a date when vacation ends.

And details field is non required field for a comment about vacation.
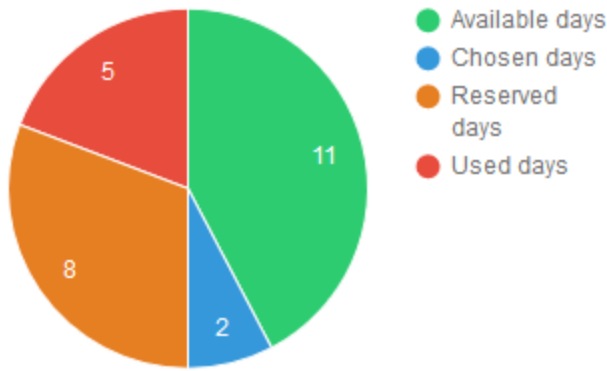
Showing data for period: -

Statistics diagram shows four values as in the above picture:

- **Available days** - days available to use,
- **Reserved days** - documents are created for this number of days but not accepted,
- **Used Days** - document are accepted for this number of days,
- **Choosen days** - number of days between choosen start and end dates.

After you click create button, you have to remember that request wont be send automatically to supervisor, you need to send it yourself in issue details using *Send to supervisor* button.

Next Vacation Manager User - Status of user Vacation Documents

Status of user Vacation Document [1.2.x]

Checking status of sent Vacation Documents

After requesting vacation using Vacation Document and sending it to supervisor, user have to wait for Supervisor to take action on his document. Supervisor can approve, reject or submit document back to user for more information/correction.

To check status of all Vacation Documents that are pending for supervisor action user must go to Navigation Bar Menu User menu My vacation request. There user can select Vacation Document and check its **Status** field.

*Example of **Waiting for approval** document.*

"Need more info" status

In case supervisor sends back document to user, user must check supervisor comment, provide more information/correct fields if needed and resend it to supervisor.

Cancelling approved Vacation Document

Accepted Vacation Document can be cancelled, but only Supervisor who approved it can do this. In this case user must contact his supervisor to cancel his approved vacations.

Next Vacation Manager User - User Statistics

User Statistics [1.2.x]

Statistics
My vacation requests

Personal statistics

User	Angelo Jones
From	2016-12-09
To	2016-12-31

Choose from-to dates to show all assigned vacations for selected user

Statistics for Angelo Jones (angelo.jones) for period: 2016-12-09 to 2016-12-31

Annual leave	5 day(s)						1 day(s)					3 day(s)										
Parental leave											1 day(s)											
	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31

December 2016

Vacation kind: Annual leave

Start date	End date	Available Days	Carryover Days	Used Days	Vacation documents
2016-12-02	2017-03-31	17	0	9	3 document(s)

● Available days
● Used days

Vacation kind: Parental leave

Start date	End date	Available Days	Carryover Days	Used Days	Vacation documents
2016-11-01	2016-12-31	9	0	3	2 document(s)

● Available days
● Used days

Here you can get statistics of all Vacation Types. You can get information like: graphical timeline of user used days (you can use mouse scroll to zoom in/out and drag to move zoomed view), list of all Vacation Definitions for every Vacation Type, all Vacation Documents for Vacation Definitions, available, carryover and used days for Vacation Definitions.

Upgrade instructions

- Upgrading to Vacation Manager 1.1.1
- Upgrading to Vacation Manager 1.2.0
- Upgrading to Vacation Manager 1.3.0

Upgrading to Vacation Manager 1.1.1

With version **1.1.1** we've added many fixes and improvements. Some of them requires modifying already existed Project components (like workflow), so due to security and JIRA integrity reasons we left some of the update steps to the JIRA Administrator.

Warning: These steps are only necessary when updating from any previous Vacation Manger version. If you are installing Vacation Manager for the first time you already have all these changes and you are ready to go!

1. **Update add-on** to version **1.1.1** from Manage add-ons tab.
   - details
     a. Log into your JIRA instance as admin
     b. Click admin dropdown menu ⚙▾ and choose **Add-ons** -> **Atlassian Marketplace**
     c. Click **Manage add-ons** from the left-hand side of the page
     d. Locate **Vacation Manager** in plugins list

e. Click **Update** to update **Vacation Manager for JIRA**

2. **Edit workflow** "*VACMAN Vacation Manager Workflow*" and add validator "*VACMAN: Reporter Validator*" to transition "*Create*".
   ∨ details

   a. Click **Issues** in administration section
   b. Click **Workflows** in workflows section
   c. Find **VACMAN Vacation Manager Workflow** and click edit

   ∨ Active

Name	Last modified	Assigned Schemes	Steps	Operations
VACMAN Vacation Manager Workflow	28/Jun/17 admin	• VACMAN Workflow Scheme	7	View · Edit · Copy

   d. Locate **Create** transition on diagram view and click on it
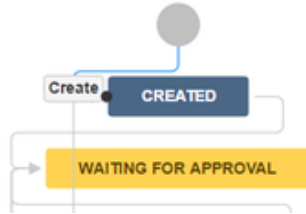
   e. Choose **Validators** option
   f. Click **Add validator** link
   g. Select **VACMAN: Reporter Validator** and click Add

   Add Validator To Transition

	Name	Description
○	Permission Validator	Validates that the user has a permission.
○	User Permission Validator	Validates that the user has a permission, where the OSWorkflow variable holding the username is configurable. Obsolete.
○	VACMAN: Comment Validator	Comment must be provided by Supervisor at least once.
●	VACMAN: Reporter Validator	Validates reporter field and checks if it is in vacation manager users group
○	VACMAN: Supervisor Validator	Validates supervisor field and checks if it is not equal reporter field
○	VACMAN: Vacation Days Validator	Validates vacation days numbers

   Add   Cancel

    h. Now just added validator should appear on validators list.

⚠ You are editing a draft workflow. [Publish Draft] [Discard Draft] View original

Workflows / VACMAN Vacation Manager Workflow (Draft)

Transition: Create

                    ●   Create

This is the **initial** transition in the workflow.

Screen: None - initial transition does not have a view.

| Validators ④ | Post Functions ⑥ |

Add validator

The transition requires the following criteria to be valid

      1. ✎ ⊗ Only users with **Create Issues** permission can execute this transition.

      2. ✎ ⊗ Validates if reporter is not the same as selected supervisor

      3. ✎ ⊗ Validates vacation days numbers using **"Start Date"** and **"End Date"** custom fields

      4. ✎ ⊗ Validates reporter field and checks if it is in vacation manager users group

3. **Edit workflow** and set "*Cancel vacation*" transition screen to "*VACMAN Comment screen*".
    ∨ details
        a. Locate **Cancel vacation** transition and double click on it to edit

           APPROVED ●————— Cancel Vacation● **CANCELED**
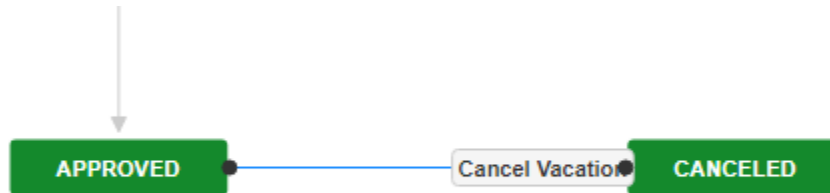
        b. In **Screen** field choose **VACMAN Comment screen**

Edit Transition

Name*	Cancel Vacation
Description	
Screen	VACMAN Comment screen ▾

[Save] Cancel

        c. Click **Save**
        d. Click **Publish Draft** to save and publish workflow changes

e. Select **Yes** to save backup copy

f. And finally **Publish** to save and publish workflow changes

4. **Create custom field** "*User Picker (single user)*", add it to Vacation Manager Project create/edit/view screens, and set it as "*Coverage person*" field in plugins *Managing Custom Fields [1.2.x]* section.
   ⌄ details
   a. Click **Issues** in Administration section
   b. Click **Custom fields** in **Fields** section
   c. Click **Add Custom Field** button in right top corner

d. Find and select **User Picker (single user)** field type
e. Name this field as you want but it functionality will be to indicate covering person so recommended name is **Covering Person** and click create.

    f. Associate this field with VACMAN Screen Create, Edit and View, by selecting checkboxes and click update

Associate field Covering Person to screens

Associate the field Covering Person to the appropriate screens. You must associate a field to a screen before it will be displayed. New fields will be added to the end of a tab.

Screen	Tab	Select
Default Screen	Field Tab	☐
Resolve Issue Screen	Field Tab	☐
VACMAN Comment screen	VACMAN Comment Field Tab	☐
VACMAN Screen Create	VACMAN Create Field Tab	☑
VACMAN Screen Edit	VACMAN Edit Field Tab	☑
VACMAN Screen View	VACMAN View Field Tab	☑
Workflow Screen	Field Tab	☐

           Update   Cancel

    g. Click **Add-ons** section in administrator section

    h. Click **Configure** in Vacation Manager section

    i. Click **Edit fields** icon in Custom Fields section

    j. Find **Coverage person** select and set it as just created single user field.

End date picker	End Date ▾	
	Maps selected custom field as end date field	
Supervisor field	Supervisior ▾	
	Maps selected custom field as supervisor field	
Coverage person	Covering Person ▾	
	⌕	field
Used vacation days	Covering Person	
	Supervisior	...ys field. This field is hidden on vacation issue views.
	Save Cancel	

    k. Click **Save** to save changes

5. **Update permission scheme** by editing groups in *Configuration panel* and saving them without any changes.
    ⌄ details

a. In Vacation Manager configuration click **Edit Groups**

b. Make sure you have checked **YES** in **Create new schemes** field

c. Click **Save** to save changes.
d. Vacation Manager now will automatically create new Permission scheme for Vacation Manager project

After completing these steps, Vacation Manager for JIRA will be fully upgraded and ready to use with new features.

In case any questions or problems with the upgrade process you can contact with us via our Customer Portal.

Upgrading to Vacation Manager 1.2.0

Upgrading from versions older than 1.1.1

Before upgrading to 1.2.0, first you have to follow Upgrading to Vacation Manager 1.1.1 instructions.

Upgrading from version 1.1.1

1. **Add field** "*Attachments*" to "*VACMAN Field Configuration*".
   ⌄ details
      a. Click **Issues** in JIRA administration section
      b. Go to **Field configurations**

c. Find field configuration used by Vacation Manager (by default it is **VACMAN Field Configuration**) and **Configure** it

d. Search for **Attachment** field and click on its **Screens** operation

e. Check **Create/Edit/View screens** used by Vacation Manager (by default: **VACMAN Screen Create**, **VACMAN Screen Edit**, **VACMAN Screen View**)

f. Click **Update** to save changes

2. **Update permission scheme** by editing groups in *Configuration panel* and saving them without any changes.
    ⌄ details

a. In Vacation Manager configuration click **Edit Groups**

b. Make sure you have checked **YES** in **Create new schemes** field

c. Click **Save** to save changes.

d. Vacation Manager now will automatically create new Permission scheme for Vacation Manager project

After completing these steps, Vacation Manager for JIRA will be fully upgraded and ready to use with new features.

In case any questions or problems with the upgrade process you can contact with us via our Customer Portal.

Upgrading to Vacation Manager 1.3.0

Upgrading from versions older than 1.2.0

Before upgrading to 1.3.0, first you have to follow Upgrading to Vacation Manager 1.2.0 instructions.

Upgrading from version 1.2.0

ℹ Before being able to do the below steps, you needs to install version 1.3.x of the add-on, then please access Vacation Manager Configuration (available in add-ons section).

Vacation Manager for JIRA - visit Atlassian Marketplace to see the latest version: Transition Technologies PSC

For the rest of the steps presented below (1 - 5), please uncloak needed one (note that they were put in an order that you should follow accordingly and do not omit any of it):

1. **Migrate field** "*Details*" to "*Description"*
   ⌄ details

a. In Vacation Manager configuration panel scroll down to the section named **Other** and click **Migrate** (Migrate descriptions) button

Custom Fields

Chart	Statistics
Start date picker	Start Date
End date picker	End Date
Supervisor field	Supervisor
Substitute person	Substitute
Used vacation days	Used vacation days

✏ Edit fields

Other

Migrate descriptions	Migrate
	Migrates data from Details field to Description
Delete configuration	🗑 Delete
	Removes all Vacation Manager plugin data from JIRA database

b. On the next screen you can choose if you want to overwrite data in description field if it is not empty

Migrate descriptions

Override data   ○ YES ● NO

Override data in Description field event when there was already text in it

Migrate Cancel

c. Click **Migrate** to complete migration process

Note: Migration process will modify description fields **only** in issues in Vacation Manager project.

2. **Add field** "*Description"* to "*VACMAN Field Configuration*".
   ⌄ details
   a. Click **Issues** in JIRA administration section
   b. Go to **Field configurations**
   c. Find field configuration used by Vacation Manager (by default it is **VACMAN Field Configuration**) and **Configure** it
   d. Search for **Description** field and click on its **Screens** operation

e. Check **Create/Edit/View screens** used by Vacation Manager (by default: **VACMAN Screen Create**, **VACMAN Screen Edit**, **VACMAN Screen View**)

f. Click **Update** to save changes

3. **Add new custom field** "*Supervisor*" of type "*Team User Picker (Vacation Manager)*" to "*VACMAN Field Configuration*".
   ⌄ details
   a. Click **Issues** in JIRA administration section
   b. Go to **Custom fields**
   c. Click **Add Custom Field**
   d. Select **Advanced** tab and choose **Team User Picker (Vacation Manager)**

     e. Click **Next,** enter name *Supervisor* (you can add some description for a reference) and accept using **Create** button

     f. On next screen check **Create/Edit/View screens** used by Vacation Manager (by default: **VACMAN Screen Create**, **VACMAN Screen Edit**, **VACMAN Screen View**)

     g. Click **Update** to save changes

     h. Navigate back to Field Configurations, click Configure (for Vacation Manager project)

     i. Make supervisor field created in **step "e"** a **required** field

     j. Switch **old supervisor** field to **optional** (we will remove this field later)

Supervisor	• VACMAN Screen Create • VACMAN Screen Edit • VACMAN Screen View	Edit Hide Required Screens
Supervisor REQUIRED Supervisor Team User Picker (Vacation Manager)	• VACMAN Screen Create • VACMAN Screen Edit • VACMAN Screen View	Edit Hide Optional Screens

4. **Update configuration** with created "*Supervisor*" field.
   - details
     a. In Vacation Manager configuration click **Edit fields**