

Legacy Documentation

Vacation Manager for JIRA [1.3.x]

(For Jira Server, Jira Data Center)

By Transition Technologies PSC

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Vacation Manager for JIRA [1.3.x]



Vacation Manager for JIRA

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Introduction [1.3.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 [1.3.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.*

 If you perform add-on upgrade, then it's necessary to follow a proper procedure (i.e. from version 1.2.x to 1.3.x) - if it won't be done, the add-on will not work as intended.

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**

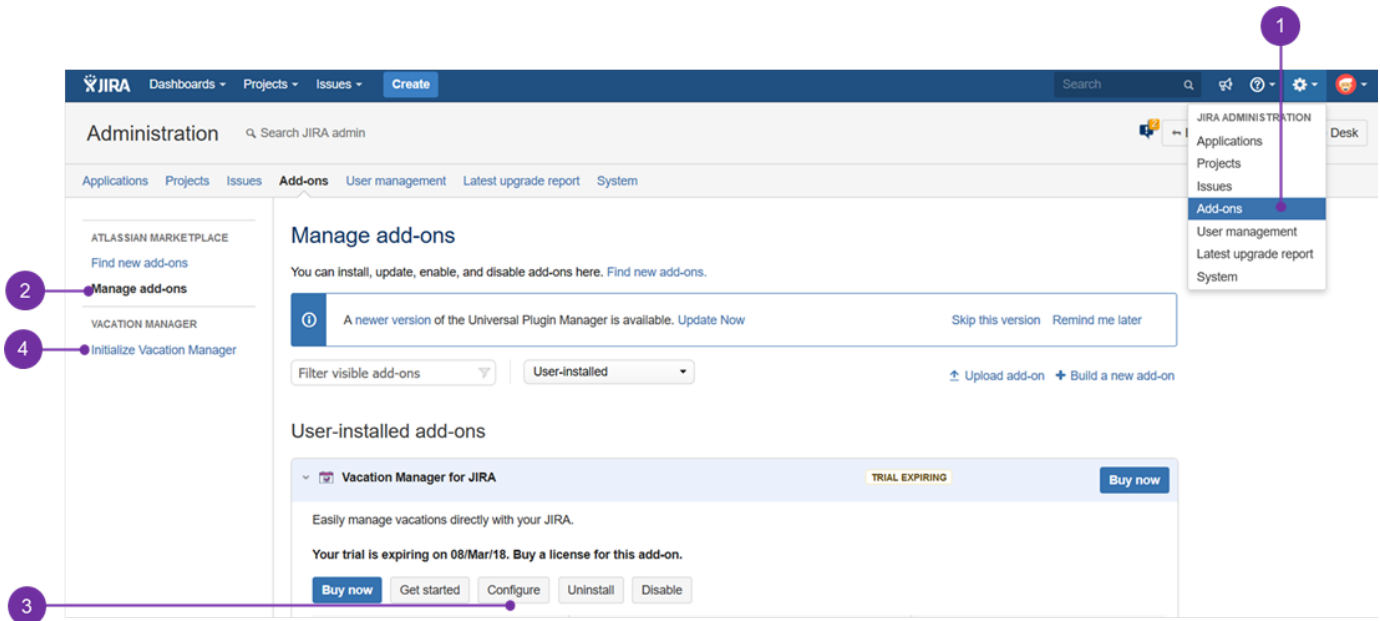
*Please keep in mind that currently Vacation Manager for JIRA is NOT compatible with **JIRA Cloud**.*

After installation you are ready to go - you can now [initialize Vacation Manager and create your first vacation type](#).

Initial Setup [1.3.x]

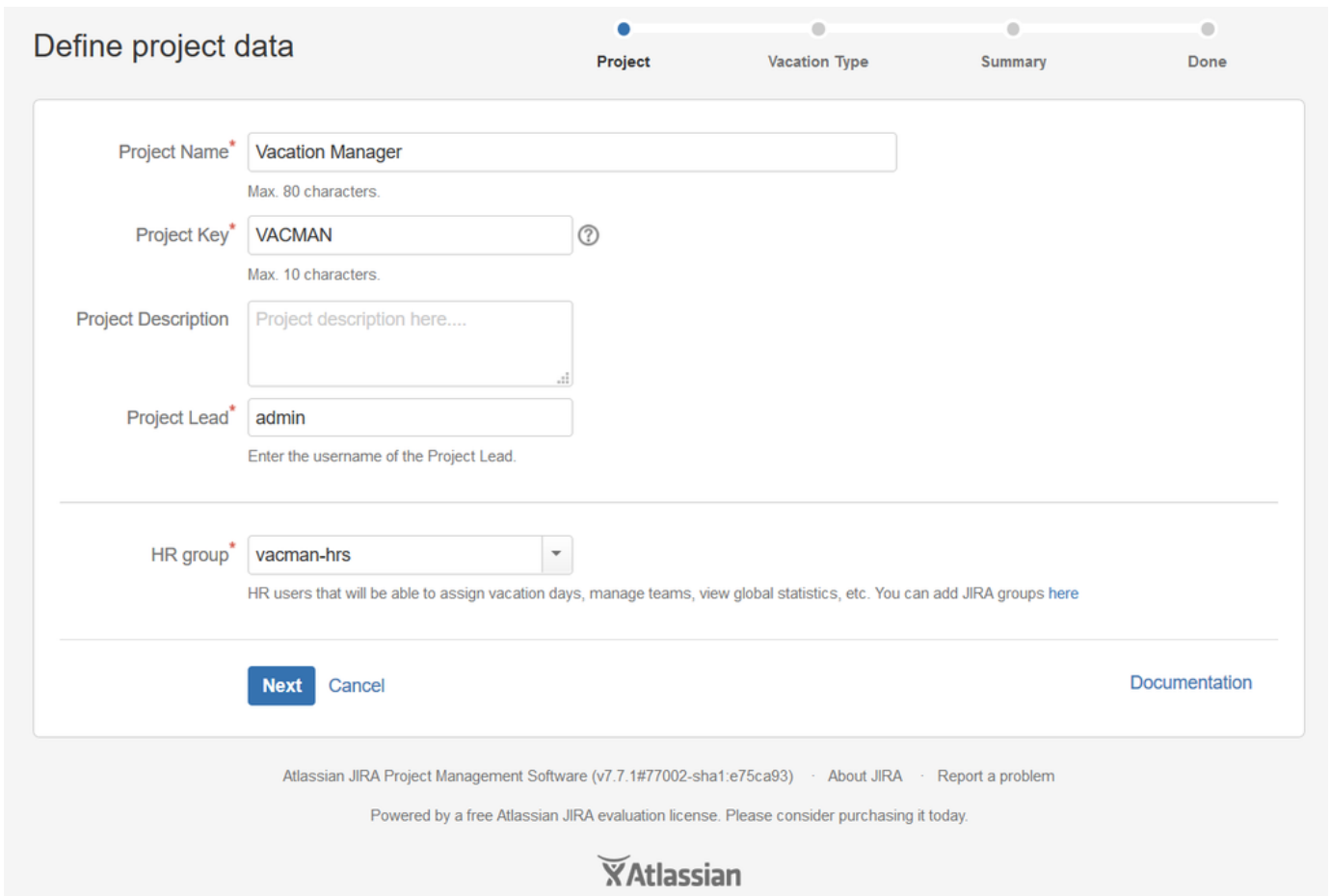
After plugin is installed you have to start initialization process. First, you have to be logged in to an administrator account and then access "Add-ons" (1).

There are two ways to do it. Either by accessing **Manage add-ons** view (2) and then clicking **Configure** (3) button. (note: button is located below Vacation Manager plugin name, cloaked inside a drop-down menu).



Alternatively by clicking **Initialize Vacation Manager** (4) link in the sidebar.

Now you should see first step view. Here it's possible to define a Vacation Manager project:



There are several fields to fill in:

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

- **Project Key** - a project key - that prefixes each issue in the project;
- **Project Description** - field describing a Vacation Manager project;
- **Project Lead** - a required field defines a Vacation Manager project lead, chosen user should have been granted with project management permissions.
- **HR Group** - any user added to a chosen HR group will have a possibility to create Teams and dedicate to it particular users and supervisors. Here they can manage and grant vacations for users. We do not recommend to use common jira groups like *jira-users*, *jira-administrators* etc. to set groups mentioned above.

[Here](#) you can read more about **groups and permissions** .

After clicking on **next** button, "Vacation Type" view should appear: Here you should see the view to configure first vacation type:

Define first Vacation Type

Project Vacation Type Summary Done

Name* Annual Leave
Max. 60 characters.

Description It is paid time off work, granted by employers to employees. It can be used for whatever an employee wishes.

Type One time Recurring

Recurring period every year
How long period lasts and how often will be renewed.

Period start date 2018-01-01
When each period will start.

Next periods 2018.01.01 - 2018.12.31
2019.01.01 - 2019.12.31
2020.01.01 - 2020.12.31
2021.01.01 - 2021.12.31
2022.01.01 - 2022.12.31
2023.01.01 - 2023.12.31
Preview of next periods since today

Carryover Days Yes No
Defines if days not used in actual period has to be rewritten to next ones.

Suggested Days 26
Number of days in periods.

Previous Next Cancel Documentation

Atlassian JIRA Project Management Software (v7.7.1#77002-sha1:e75ca93) · About JIRA · Report a problem
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There are several fields describing Vacation Type:

- **Name** - Vacation Kind name
- **Description** - Description of a 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 have a specified end date, check NO if you do not wish so,
- **Has Suggested Days** - checking Yes shows the field where you can specify suggested days number that is to be 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 with a new period,
 - **Period start date** - specifies when Vacation Type starts its first period,
 - **Next periods** - shows how period will look like,
 - **Carryover Days** - defines if unused days will be rewritten to a next period,
 - **Suggested Days** - specify default days number granted to this Vacation Type every period (it can be changed at a later time)

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:

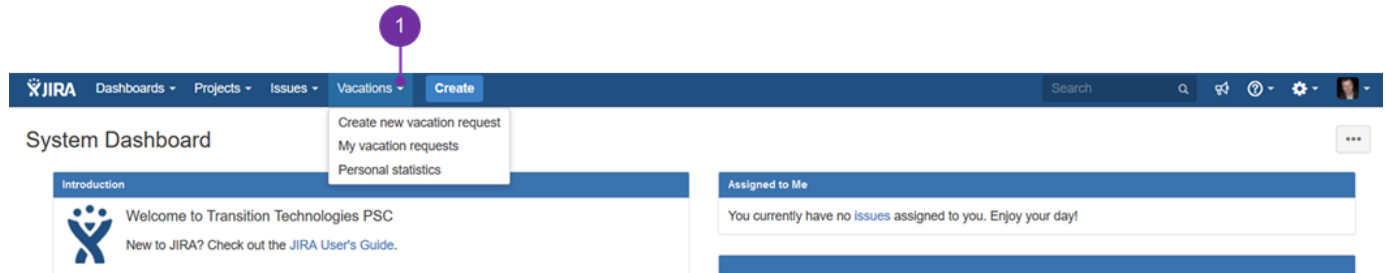
Click **create** to create Vacation Manager configuration.

Next Vacation Manager core elements - [Navigation Bar Menu \[1.3.x\]](#)

Navigation Bar Menu [1.3.x]

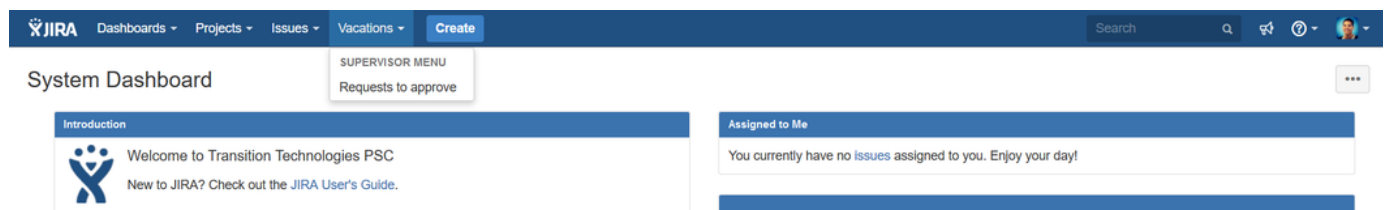
In JIRA Nav bar has been added to the Vacation menu. Its appearance depends on the permissions of the account you are currently logged in. More about permissions in [Vacation Manager Groups and Permissions](#)

If you are logged in on an account, which is user member, you will see this type of menu (1):

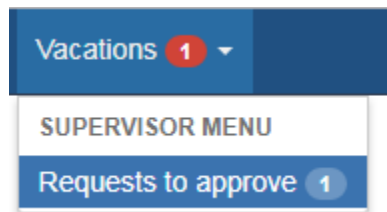


- **Create new vacation request** - redirects to the page to create new Vacation Document
- **My vacation request** - redirects to the issue view screen with predefined JQL filter, personalized to a user.
- **Personal Statistics** - redirect to the *Statistics* page, where user is able to see his/her Vacations' details.

If you are logged in on an account, which is included under a supervisors' group membership, you will see menu like the one below:



i In case any user sends a vacation request to his/her supervisor, then he/she can see how many request are pending for an approval directly in the menu:



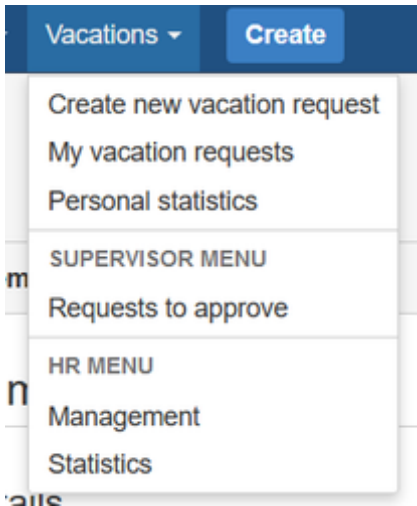
- **Request to approve** - redirects to the page to issue view screen with ready-made JQL filter set to show documents that require action. Red notification number will indicate number of request waiting to be reviewed by you.

If you are logged in on an account, which belongs to HR group, you will see such menu as the one below:

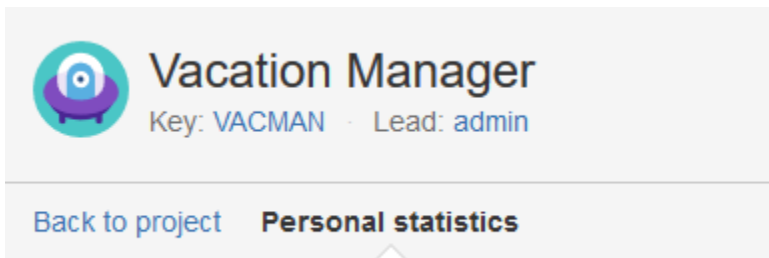


- **Management** - redirects to the *Management* page, where HR user is able to manage Vacations of any user.
- **Statistics** - redirects to the *Statistics* page, where user is able to see Vacation details of any user.

If you are logged in, on an account that belongs to many groups, then all of the ranks' options are combined:

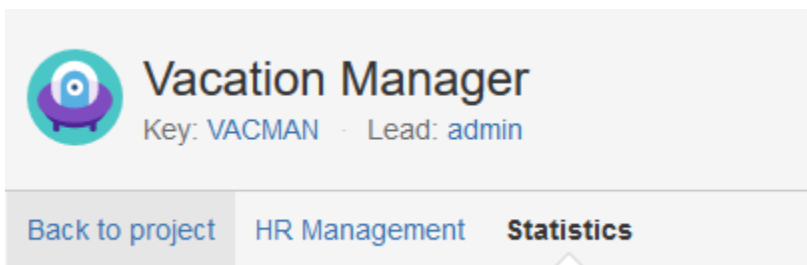


If you access any of the drop-down menu section items, (as presented above) it is to redirect you to a particular Vacation Manager configuration, or informative page. After entering such, you will be able to see the navbar for a User rank that is to be similar, as the one below:

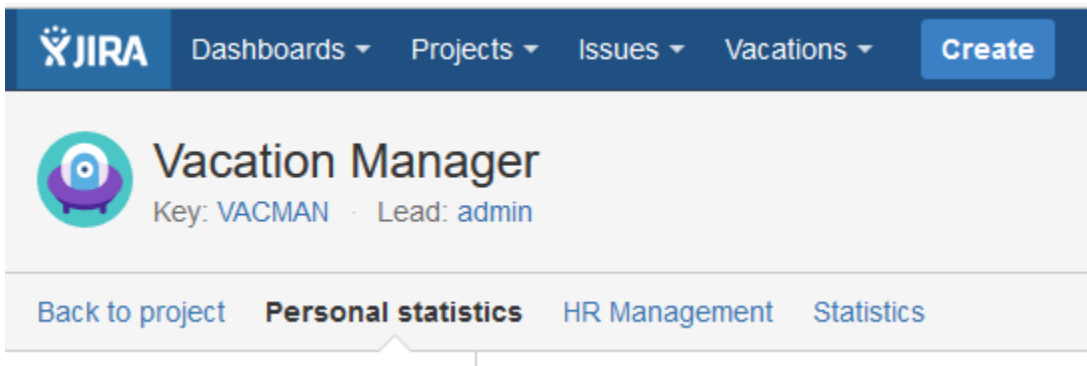


- **Personal statistics** is **Statistics** view from *USER MENU* section

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 [1.3.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 [1.3.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 [1.3.x]

Vacation Type in Vacation Manager are mapped to JIRA Issue Type and can be chosen by User when creating new [Vacation Document](#) (1), just like any other Issue Type (2).

The screenshot shows the 'Create Issue' interface for the 'Vacation Manager (VACMAN)' project. The 'Issue Type' dropdown is open, showing options: Annual Leave, Sick Leave, Maternity Leave, Holiday Demand, and Educational Leave. The 'Supervisor' and 'Coverer' fields are empty with user selection icons. A 'Statistics' section features a green circle with the number '28' and a legend for 'Available days'. Below this, it states 'Showing data for period: 31/Dec/17 - 30/Dec/18'. At the bottom, there are 'Start Date' and 'End Date' fields with calendar icons, and a footer with the instruction 'After creating document review it and send using Send to supervisor button' and buttons for 'Create another', 'Create', and 'Cancel'.

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 [1.3.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 Barry Webb

Vacation type **RECURRING**

Suggested Days

Period **12 MONTH**

	Period start date	Period end date	Days	Actions
PAST	2016-12-31	2017-12-30	Entitled: 20 Carryover: 0 Used: 12	<input type="button" value="Edit"/>
CURRENT	2017-12-31	2018-12-30	Entitled: 20 Carryover: 8 Used: 0	<input type="button" value="Edit"/>
FUTURE	2018-12-31	2019-12-30	Entitled: 20 Carryover: 0 Used: 0	<input type="button" value="Edit"/>
NEW	2019-12-31	2020-12-30		<input type="button" value="Add new"/>

[Check approved documents belong to these periods...](#) [Back](#)

Annual Leave type vacation details

User John Brown

Vacation type **RECURRING**

Day limit

Period **12 MONTH**

	Period start date	Period end date	Days	Actions
CURRENT	2016-01-01	2016-12-31	Entitled: 20 Carryover: 0 Used: 0	<input type="button" value="Edit"/>
FUTURE	2017-01-01	2017-12-31	Entitled: 20 Carryover: 0 Used: 0	<input type="button" value="Edit"/>
NEW	2018-01-01	2018-12-31		<input type="button" value="Add new"/>

[Check approved documents belong to these periods...](#) [Back](#)

Next Vacation Manager core elements - [Vacation Document](#)

Vacation Document [1.3.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 creation screen in JIRA by selecting Vacation Manager project, or by selecting *Create new vacation request* from [Navigation Bar Menu](#).

Create Issue Configure Fields

Project

Issue Type

Supervisor Start typing to get a list of possible matches.

Coverer Start typing to get a list of possible matches.

Statistics

Available days
 Chosen days

Showing data for period: 31/Dec/17 - 30/Dec/18

Start Date

End Date

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

Vacation Document Creation screen

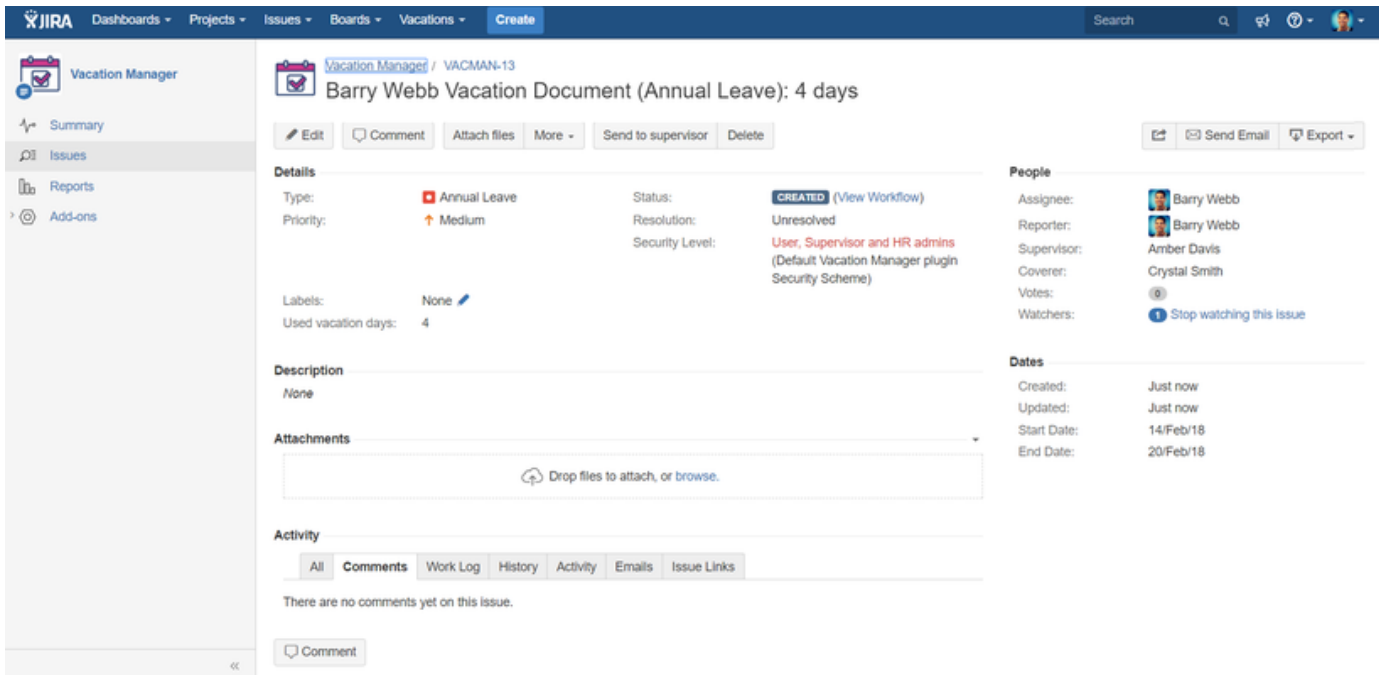
On creation screen user can select essential details about vacation that he want to request: Vacation Type, start and end date, supervisor to which request will be send and optionally details.

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:



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](#)

Roles and Permissions [1.3.x]

There are three main role types in Vacation Manager:

- Teams:
 - Users
 - Supervisors
- Groups:
 - HR

Any user can be assigned to multiple roles. In other words any Supervisor, or HR team member can be also in User Groups. That means they can also create new Vacation Request.

While HR group is mapped to one of existing groups in Jira, users and supervisors are managed by using [Teams \[1.3.x\]](#) feature.

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

Users

Main role for end users is a possibility to 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

Role 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

Users in *human resources* group can manage Teams, team members, Vacation Definitions and Holiday/Workweek schemes.

HR can:

- manage teams,
- manage members (users/supervisors) in Teams,
- add/edit [Vacation Definitions](#) (vacation days available) for users,
- add/edit new holidays and free days in holiday schemes,
- add/edit workday schemes and set working days in week,
- view vacation statistics for any User and any Vacation Kind,
- view all Vacation Documents for every user,
- create and edit Vacation Documents for other Users,
- access *HR Management Menu* in [Navigation Bar Menu](#) and its functions.

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.

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](#)

Admin Configuration [1.3.x]

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

You can access this panel as Administrator from  *Add-ons (1) Vacation Manager Configuration (2)*

The screenshot displays the 'Configure Vacation Manager' page in the JIRA Administration interface. The page is organized into several sections:

- General:**
 - Project:** Vacation Manager (JIRA project used by Vacation Manager)
 - Auto-summary:** Radio buttons for YES (selected) and NO. Summary for new Vacation Documents will be hidden and filled automatically.
 - Auto-summary text:** A text input field containing: `$(reporter) Vacation Document ($(vacationType)): $(vacationDays) days`. Below it, a note states: "You can use special variables: \$(reporter) \$(supervisor) \$(startDate) \$(endDate) \$(vacationDays) \$(vacationType) \$(description) \$(created) \$(holidayScheme) \$(workweekScheme)".
 - Recalculate vacations:** A dropdown menu set to "everyday at 0:00" and a "Recalculate now" button. A note below says: "All recurring vacation calculations will be fired everyday at specified hour. Last fire time: 3/7/18 12:00 AM".
 - User vacation warning:** Radio buttons for YES (selected) and NO. "Show warning near User Picker fields when user is currently out on vacation."
 - Days before user vacation warning:** A numeric input field set to "7". "Number of days before user leave showing user picker warning about upcoming absence".
 - A "Save" button is located at the bottom of this section.
- Groups:**
 - HR group:** vacman-hrs
 - An "Edit groups" 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
 - An "Edit fields" button.
- Other:**
 - Delete configuration:** A button with a trash icon. "Removes all Vacation Manager plugin data from JIRA database".

At the bottom of the page, there is a footer with the Atlassian logo and version information: "Atlassian JIRA Project Management Software (v7.7.1977002-sha1.e75ca93) · About JIRA · Report a problem". Below that, it says: "Powered by a free Atlassian JIRA evaluation license. Please consider purchasing it today."

All of the above presented sections with its elements are described below:


General

- *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 it will be generate a summary field value. To describe it, you can choose from the below variables:
 - *reporter* - reporter of an issue,
 - *supervisor* - supervisor chosen by reporter while creating an issue,
 - *startDate* - requested start date,
 - *endDate* - requested end date,
 - *vacationDays* - vacation days used by request,
 - *vacationType* - name of requests vacation type,
 - *description* - valie from description field,
 - *created* - date when Vacation Document was first created,
 - *holidayScheme* - holiday scheme used by reporter,
 - *workweekScheme* - workweek scheme used by reporter.

- *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.
- *User vacation warning* - displays warning globally in all Jira issue user fields, when selected user is currently on vacation.

Groups

Currently there is one global group to edit - HR group. If you want to manage Users and Supervisors, please refer to [Teams section](#).

 As this is a significant change when comparing it with 1.2.x version, you may also find useful information on this [page](#).

When editing groups, you will be able to select option **Create new schemes**. This option specifies if actual Jira schemes (e.g. permission, notification) in Vacation manager project will be overwritten by new schemes created with new groups. 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 an old ones. Instead, it will be composed of basic Vacation Manager schemes without any changes provided by user in previous schemes. Previous schemes will not be deleted, so administrator should do it himself/herself. **We recommend to leave this option checked as YES to avoid future problems with modified groups' permissions.**

Custom Fields

List of all custom fields used by Vacation Manager plugin to calculate used days, display days chart etc.:

- *Chart* - displays statistics in a pie chart form, with selected and available vacation days.
- *Start/End date pickers* - date pickers where user can select start and end date of an absence. Those 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.
- *Substitute person* - 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.

When editing custom fields you will be able to select option **Migrate data**. When selected, data from changed fields will be copied to newly selected fields. This operation will be performed ONLY on Vacation Documents (Issues created in Vacation Document project). Please note: if there was already data in newly selected field, it will be overwritten.

Other

In case you want to clear all Vacation Manager plugin data and remove all its data from your database you have an option to *Delete configuration*. Please be aware that this will remove ONLY plugin data from your database. All [Jira integration elements](#) (like Jira project, Issues, Permission scheme etc.) will be left intact and you need to remove them manually.

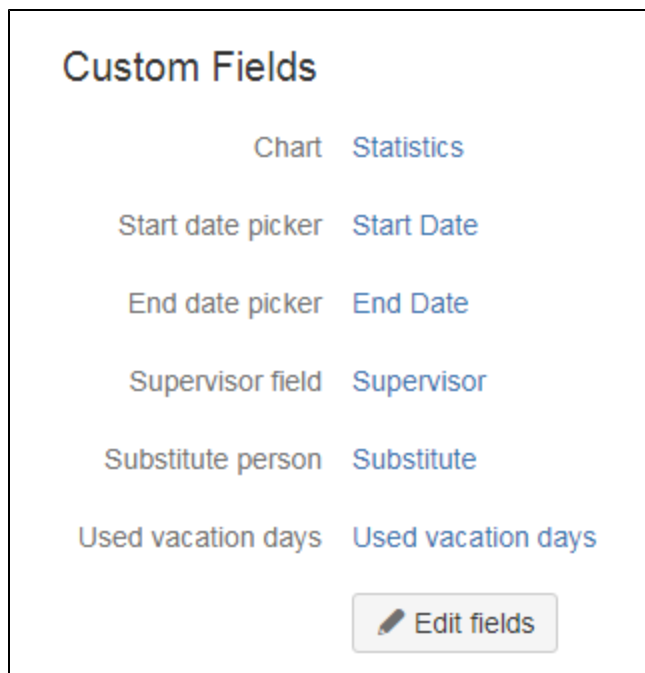
After this operation you will be able to perform [Initial setup](#) again.

Warning: this operation is permanent and cannot be undone, so please consider doing backup of your Jira before performing it.

Next Vacation Manager admin configuration - [Managing Vacation Types](#)

Managing Custom Fields [1.3.x]

You can view and edit custom fields used by Vacation Manager plugin in *Custom Fields* section in [Vacation Manager Configure panel](#).



Custom fields used by Vacation Manager

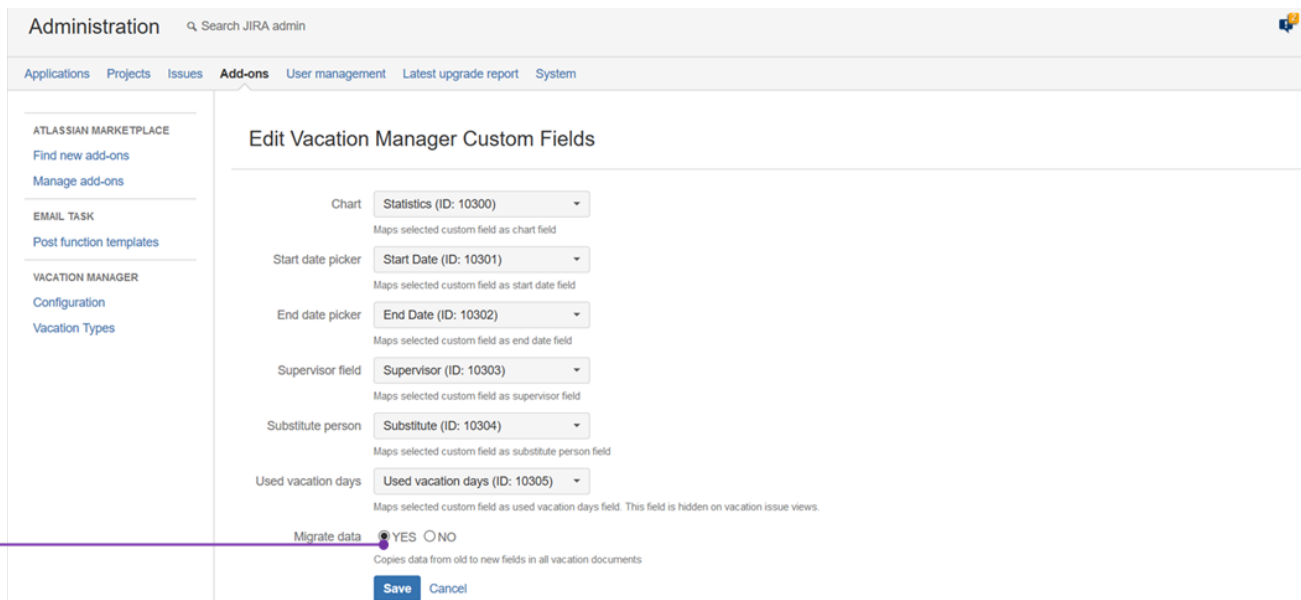
- *Chart* - displays statistics in pie chart with selected and available vacation days.
- *Start/End date pickers* - date pickers where user can select start and end dates of absence. These fields are used internally for calculating used days.
- *Supervisor field* - single user picker with supervisor 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.
- *Substitute person* - single user picker, contains information about coverage person on reporter's absence.
- *Used vacation days* - number field with vacation days used by vacation request. This field is automatically calculated.

Changing field and migrating data in existing Vacation Documents

How to get to this stage is presented [here](#) (point 4)

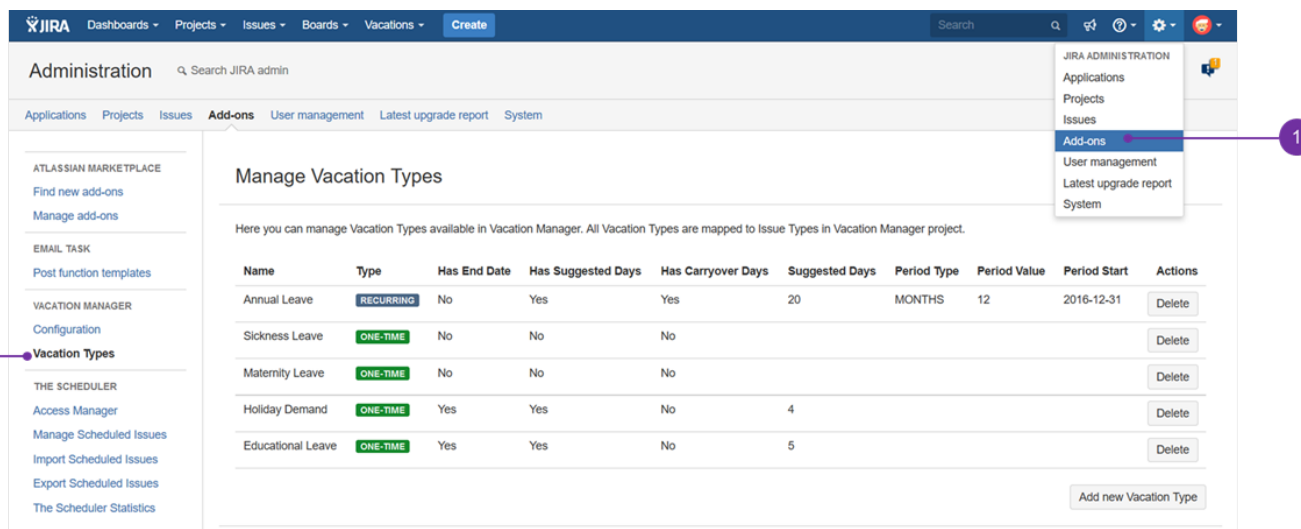
When editing field you have option to migrate data from existing vacation documents between old and new field. When checked as "Yes" (1), all data from old field in Vacation Documents (Issues created in Vacation Manager project) will be copied to a newly selected field.

Warning: This operation will overwrite all existing data in newly selected custom field in every Vacation Document.



Managing Vacation Types [1.3.x]

Available Vacation Types



As an admin you can display all available [Vacation Types](#) using [Vacations Types](#) tab located in *JIRA Administration Add-ons* (1) [Vacations Types](#) (2). 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 (1). 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.

The screenshot shows the JIRA Administration interface. The left sidebar contains navigation options like 'ATLASSIAN MARKETPLACE', 'EMAIL TASK', 'VACATION MANAGER', and 'THE SCHEDULER'. The main content area is titled 'Manage Vacation Types' and includes a table of existing vacation types. A purple circle with the number '1' points to the 'Delete' button in the 'Actions' column for the 'Annual Leave' row.

Name	Type	Has End Date	Has Suggested Days	Has Carryover Days	Suggested Days	Period Type	Period Value	Period Start	Actions
Annual Leave	RECURRING	No	Yes	Yes	20	MONTHS	12	2016-12-31	Delete
Sickness Leave	ONE-TIME	No	No	No					Delete
Maternity Leave	ONE-TIME	No	No	No					Delete
Holiday Demand	ONE-TIME	Yes	Yes	No	4				Delete
Educational Leave	ONE-TIME	Yes	Yes	No	5				Delete

Adding new Vacation Type

You can add new Vacation Type from *Available Vacation Types* screen using *Add new Vacation Type* button (1):

This screenshot is identical to the one above, showing the 'Manage Vacation Types' page. A purple circle with the number '1' now points to the 'Add new Vacation Type' button located at the bottom right of the table area.

Currently there are two main types you can create: *One time* and *Recurring* Vacation Types (1):

Add new vacation type

Name
Max. 60 characters.

Description

1 • Type One time
 Recurring

Has End Date Yes
 No
Enable/Disable option to define when period ends.

Has Suggested Days Yes
 No

Suggested Days
Number of days in periods.

One time

- **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

The screenshot shows the 'Add new vacation type' form. It contains the following fields and options:

- Name**: Text input field with a red asterisk and a note 'Max. 60 characters.'
- Description**: Text area with placeholder text 'Issue Type description here....'
- Type**: Radio buttons for 'One time' and 'Recurring'. 'Recurring' is selected. A purple circle with the number '1' is next to this field.
- Recurring period**: Dropdown menu with 'every year' selected.
- Period start date**: Text input field with placeholder 'yyyy-mm-dd'.
- Next periods**: Text 'N/A' with a note 'Preview of next periods since today'.
- Carryover Days**: Radio buttons for 'Yes' and 'No'. 'Yes' is selected. A note below says 'Defines if days not used in actual period has to be rewritten to next ones.'
- Suggested Days**: Dropdown menu with 'None' selected. A note below says 'Number of days in periods.'

At the bottom, there are 'Add' and 'Cancel' buttons.

- **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](#)

Jira Integration Elements [1.3.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 Documents 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 vacation 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,
- **Permission schemes** (VACMAN Permission Scheme) - permissions for Vacation Manager groups.

Next Vacation Manager HR Management - [User, HR Staff and Supervisors Management](#)

Adding Vacation definition [1.3.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 (2).
- "Valid through" - end of a period, when user is entitled to request an off-work day(s) (3).
- "Days" - enter here number of days for periods (4).

Add vacation definition

Definition details

1 • Vacation type Annual Leave

2 • Start date

3 • Valid through

4 • Days

9 •

5 • [You are about to edit those users...](#)

Full name	Username	Entitled days	Carryover days	Used days
Mitch Davis	mdavis-sd-demo	0		0
Ryan Lee	rlee-sd-demo	0		0

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After clicking on "You are about to edit those users..." (5) you can uncloak the list of users whom were selected on a previous screen and decided to be assigned with particular vacation type (1).

"Entitled days" (6) value gets populated after following the below mentioned actions and clicking the "Add" (9) button. If user decides to use any day of a given quota, then number of it is to be displayed here (8).

There is another disabled and not visible for for non-recurring vacation types, named "End of first period" (10). it contains an information when period of recurring vacation type (1) will end. This value is calculated based on period chosen during creating vacation kind:

Add vacation definition

Definition details

1 Vacation type Spring Break

Start date

10 End of the first period

Days

You are about to edit those users...

Full name	Username	Entitled days	7 Carryover days	Used days
Alana Grant	agrant-sd-demo	0	0	0

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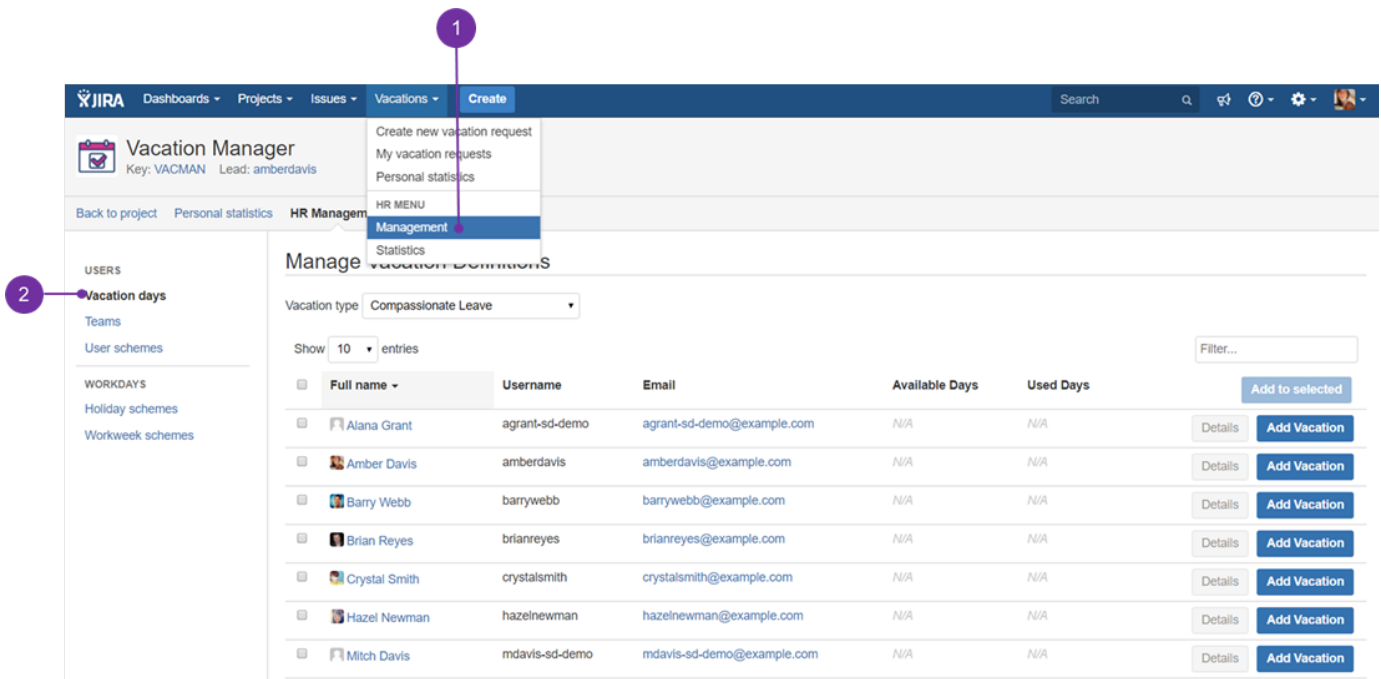
i "Carryover days" are (7) visible only for recurring vacation types. Please be advised that if all a particular vacation type i.e. unused Annual Leave quota is not used within a year, then in the next calendar, unused quota is to be visible here.

Next Vacation Manager HR Management - [Vacation definition detailed view](#)

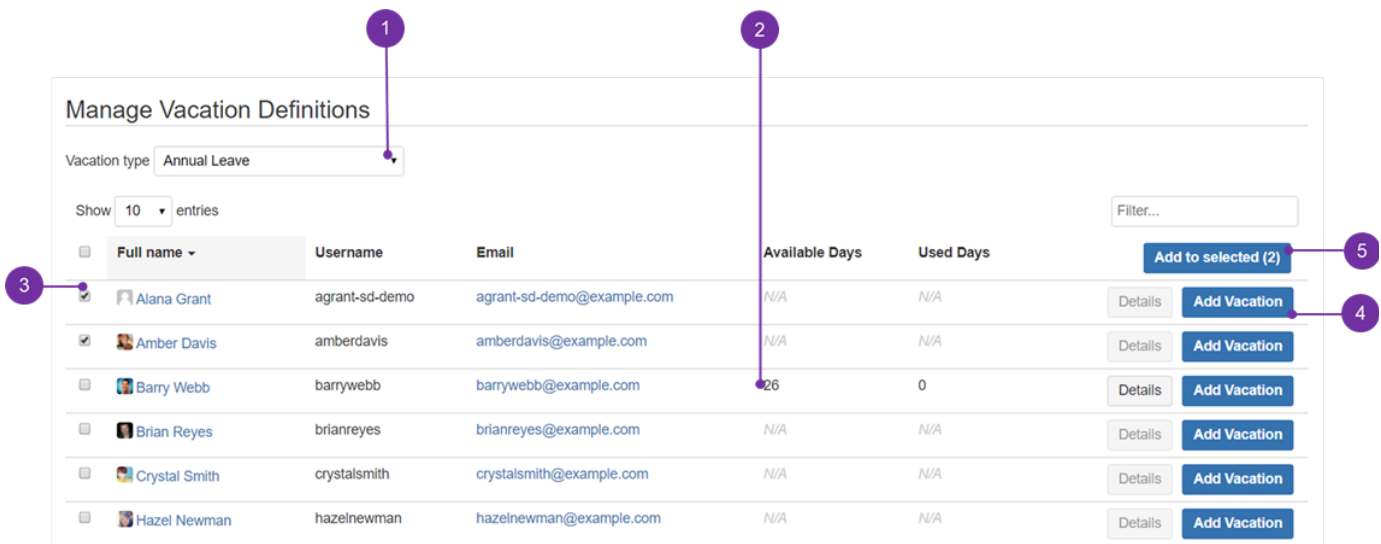
Managing Vacation Definitions [1.3.x]

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 access it, please be logged as a HR Jira's group member and from HR Menu access "Management" (1) option, then head to "Vacation days" (2):



To start manage user vacations at first HR user has to choose *Vacation type* in top left corner of Manage Vacation Definitions frame (1):



After selecting a particular vacation type, table will refresh and show basic selected type vacation information of each user i.e. available days (2). To define new Vacation definition, HR user has to use *Add vacation* button (4) associated with user, or select checkboxes (3) at left from user names. If at least one checkbox is selected, then *Add to selected* (5) option will become active (number os selected users is displayed in the activated button). This solution enables to add in bulk to selected users, particular vacation type and number of permitted days for its usage). After doing so, it will be possible to see available days of selected vacation type next to user, to whom particular leave type was added (like on the above example).

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](#).

i *Add vacation* button is disabled if selected vacation type is recurring 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](#).

i *Details* button is disabled if user has no defined vacation definition for selected vacation type. Details button content is revealed after clicking on it:

Annual Leave

User Barry Webb Vacation type **ONE-TIME** Suggested Days Yes

	Start date	End date	Entitled days	Used days	
CURRENT	2018-02-20	2018-08-30	26	0	Edit

[Check approved documents belong to these periods...](#) [Back](#)

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Next Vacation Manager HR Management - [Adding Vacation definition](#)

Vacation definition detailed view [1.3.x]

To access detailed view, please open Vacations menu to select "Management" (1), then go to "Vacation days" (2). "Details" (3) button gets active only when at least one vacation type has been assigned to particular user(s).

The screenshot shows the JIRA Vacation Manager interface. A dropdown menu is open from the 'Vacations' menu, with 'Management' selected (1). In the left sidebar, 'Vacation days' is selected (2). The main content area shows a table of users with columns for Full name, Username, Email, Available Days, and Used Days. For Barry Webb, the Available Days are 25 and Used Days are 1. For Brian Reyes, Available Days are N/A and Used Days are N/A. 'Details' buttons are visible for Barry Webb and Brian Reyes, with the one for Barry Webb being highlighted (3).

After accessing details, one can spot that views of each Vacation type may differ in some aspects - main difference is how one time vs recurring every given period leaves look like.

One time vacation type:

At the top are basic information about this Vacation type(1), such as: user (2), vacation type (3) and information if the vacation type is of a current calendar year or not (4). Right next to it, there's an information about when particular vacation can be used (with time frame defined) presented in a table-like form with headers (marked in bold font style) that allow to sort elements under it.

Below the upper table, there is a *Check approved documents belong to these periods...* link (5). It lists all requests for this vacation type (1) approved by user's team supervisor (7). It is displayed as a list of periods assigned to this user and particular vacation type, placed also in a table form. Each header i.e. "Status" (6), gives a possibility to sort elements in accordance with alphabetical, or counter-alphabetical order. In case of numbers - in an ascending/descending way.

i Be advised - only vacation requests to which user's supervisor positive decision was made are displayed, with proper information **(8)**. Those that were rejected, are not listed here.

As for the edit button **(9)** - after clicking it, HR member can quickly edit period of a current leave (time frame when it can be used) and amend number of entitled days.

The screenshot shows the 'Compassionate Leave' page. Callout 1 points to the title. Callout 2 points to the user 'Crystal Smith'. Callout 3 points to the 'ONE-TIME' vacation type. Callout 4 points to the 'CURRENT' status. Callout 5 points to a link for approved documents. Callout 6 points to the 'Status' column header. Callout 7 points to the 'Assignee' 'brianreyes'. Callout 8 points to the 'APPROVED' status. Callout 9 points to the 'Edit' button.

Start date	End date	Entitled days	Used days
2018-02-21	2018-12-31	10	4

Key	Summary	Start date	End date	Assignee	Status
VACMAN-3	Crystal Smith Vacation Document (Compassionate Leave): 4 days	2018-02-21	2018-02-26	brianreyes	APPROVED

After clicking on "Edit button" you may expect similar possibilities:

The 'Edit period' form contains the following fields:

- Start date: 2018-02-21
- End date: 2018-12-31
- Entitled days: 10
- Used days: 4

Buttons: Save, Cancel

Recurring vacation type

1 Annual Leave type vacation details

2 User Barry Webb

5 Suggested Days: 26

3 Vacation type: **RECURRING**

4 Period: **12 MONTH**

	Period start date	Period end date	Days	Actions
CURRENT	2018-01-01	2018-12-31	Entitled: 26 Carryover: 0 Used: 1	<input type="button" value="Edit"/>
FUTURE	2019-01-01	2019-12-31	Entitled: 26 Carryover: 0 Used: 0	<input type="button" value="Edit"/>
NEW	2020-01-01	2020-12-31		<input type="button" value="Add new"/>

6 **NEW** 2020-01-01 2020-12-31

7

11 [Check approved documents belong to these periods...](#)

Key	Summary	Start date	End date	Assignee	Status
VACMAN-2	Barry Webb Vacation Document (Annual Leave): 1 days	2018-02-21	2018-02-21	brianreyes	APPROVED

8 brianreyes

9 **APPROVED**

10

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Another option is view for *Recurring* vacation type (3). Right below there's also an information about a period after which selected vacation type is to occur again (4). Other content is quite similar to the above mentioned one time holiday type, however it has some differences. At the top of view you will see selected user (2) and vacation type (1), however contrary to one time vacation request details, here "suggested days" (5) button is present. It's possible to amend number of suggested days immediately.

Below the upper table, there is a *Check approved documents belong to these periods...* link (11). It lists all requests for this vacation type (1) approved by user's team supervisor (8). It is displayed as a list of periods assigned to this user and particular vacation type, placed also in a table form. Each header i.e. "Status", gives a possibility to sort elements in accordance with alphabetical, or counter-alphabetical order. In case of numbers - in an ascending/descending way.

i Be advised - only vacation requests to which user's supervisor positive decision was made are displayed, with proper information (9). Those that were rejected, are not listed here.

As a default feature, only present day and next period are presented. If you need to plan it in advance, then you can see when new period should start (6). To have it scheduled, press "Add new" button (7). After doing so, you will be presented with similar prompt:

Add recurring period

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

Period start date 2020-01-01

Period end date 2020-12-31

Entitled days

Define entitled days number in new period.

Add **Cancel**

As you can see, here you also have a direct possibility to amend the number of entitled days for particular user's recurring future vacations.

i Such feature is useful for e.g. changes with all postgraduates who after every worked year may gain more annual leave days to be used.

By filling in mentioned value field and clicking "Add" you will add new period manually. If you don't do it manually, it will be done automatically (if you do this manually, jira job won't create another in the same date scope). You cannot define date scope of recurring period.

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

If one needs to change number of entitled days for particular, but added recurring period, then "Edit" (**10**) button is the answer:

Edit period

Start date 2018-01-01

End date 2018-12-31

Entitled days

Carryover days 0

Used days 1

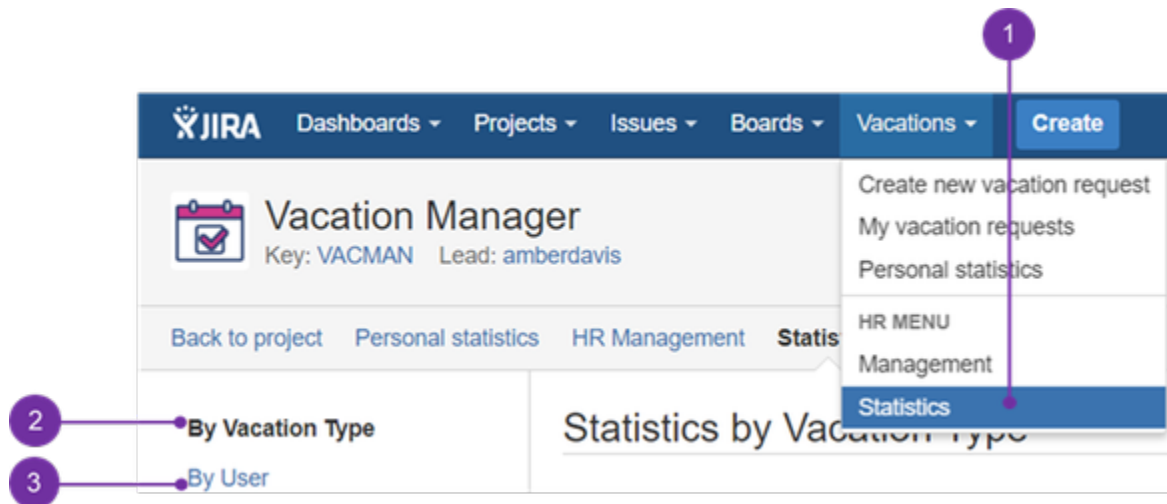
Save **Cancel**

Click **Save** to save changes.

Next Vacation Manager HR Management - [HR Statistics](#)

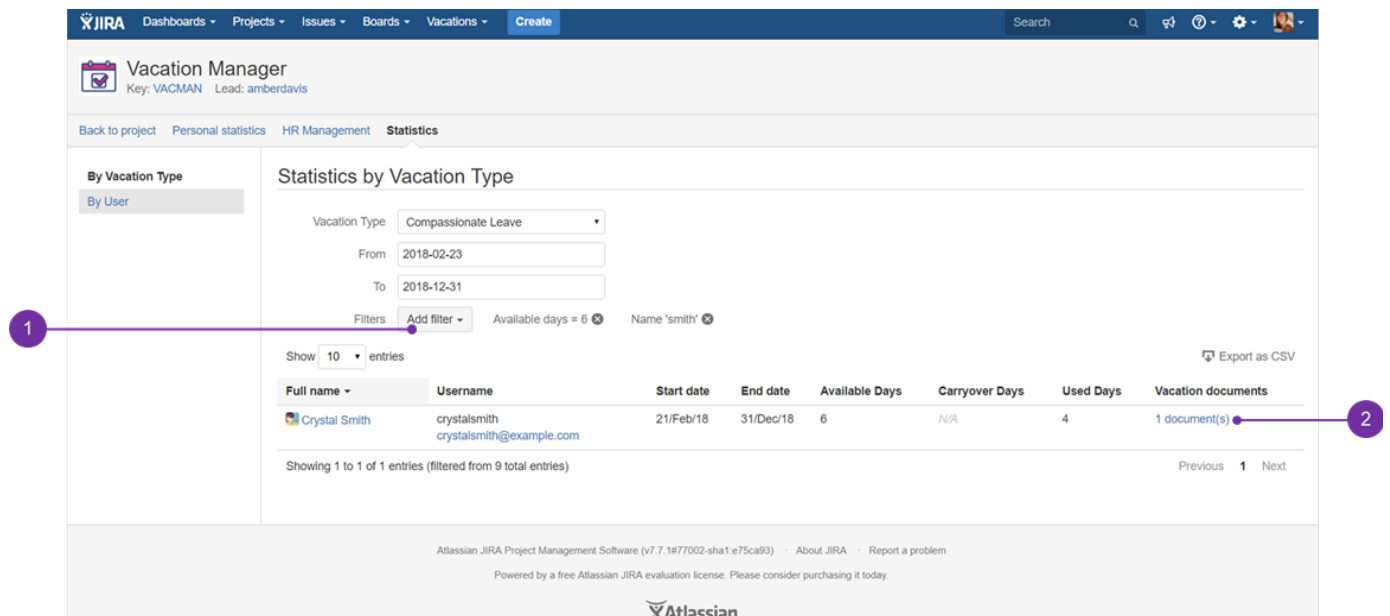
HR Statistics [1.3.x]

Vacation Manager has two built-in types of statistics for HR users: statistics by User (3) and by Vacation Type (2). Both can be accessed from [Navigation Bar Menu Statistics](#) (1):



By vacation type:

You can use built in JIRA Issues search/filtering (1), as Vacation Manager treats its created Issues as [Vacation Document](#) (2):



i The above example presents incorporation of some of the available filters. It's possible also to filter using not only "available days", or "Name", but in addition "carryover days" and "used days" as well. For any filter you can use detailed operators: "less than", "equal", "greater than".

To sum up - after accessing "By vacation type" you can get all [Vacation Definitions](#) with their data for users by Vacation Type and selected start /end dates. You can get information like:

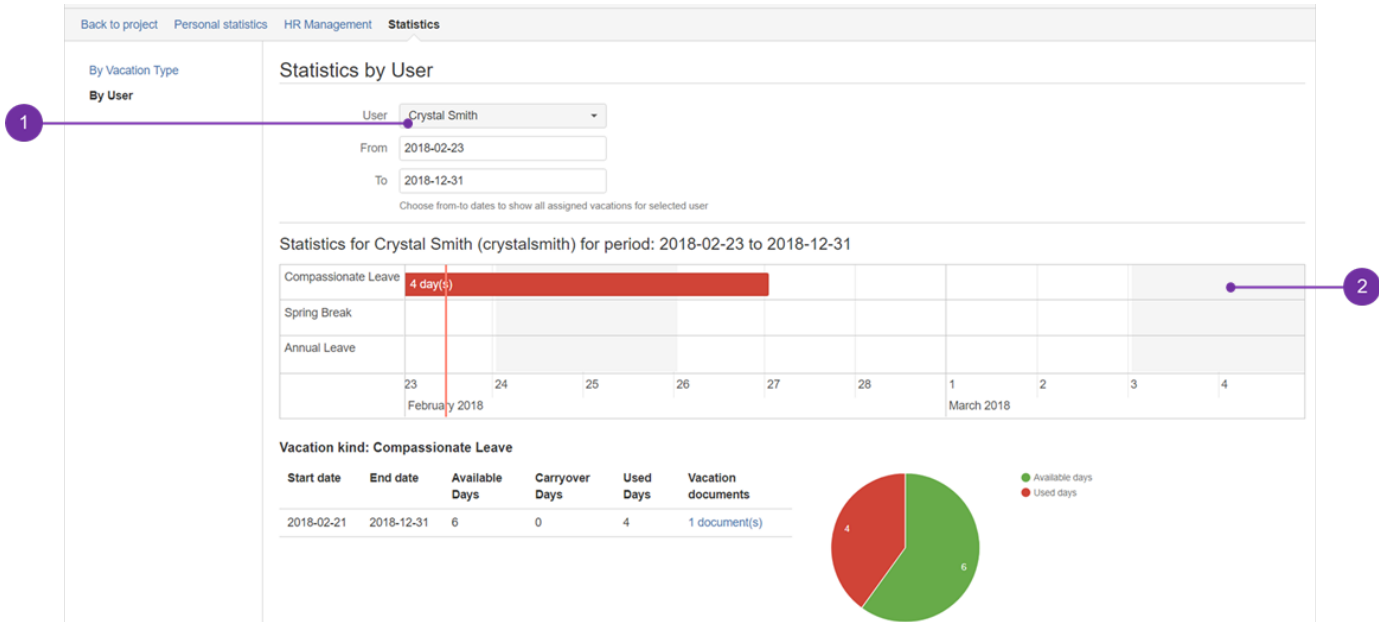
- list of all [Vacation Definitions](#) for every User,
- all [Vacation Documents](#) for Vacation Definitions,
- available, carryover and used days for Vacation Definitions.

Additionally you filter and sort rows by selected columns.

By user:

Here you can get statistics of all Vacation Types for chosen user (1) and from/to dates. You can obtain information like:

- graphical timeline of user used days (2) (you can use mouse scroll to zoom in/out and drag to move zoomed view, when mouse cursor hovers over it),
- 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](#).

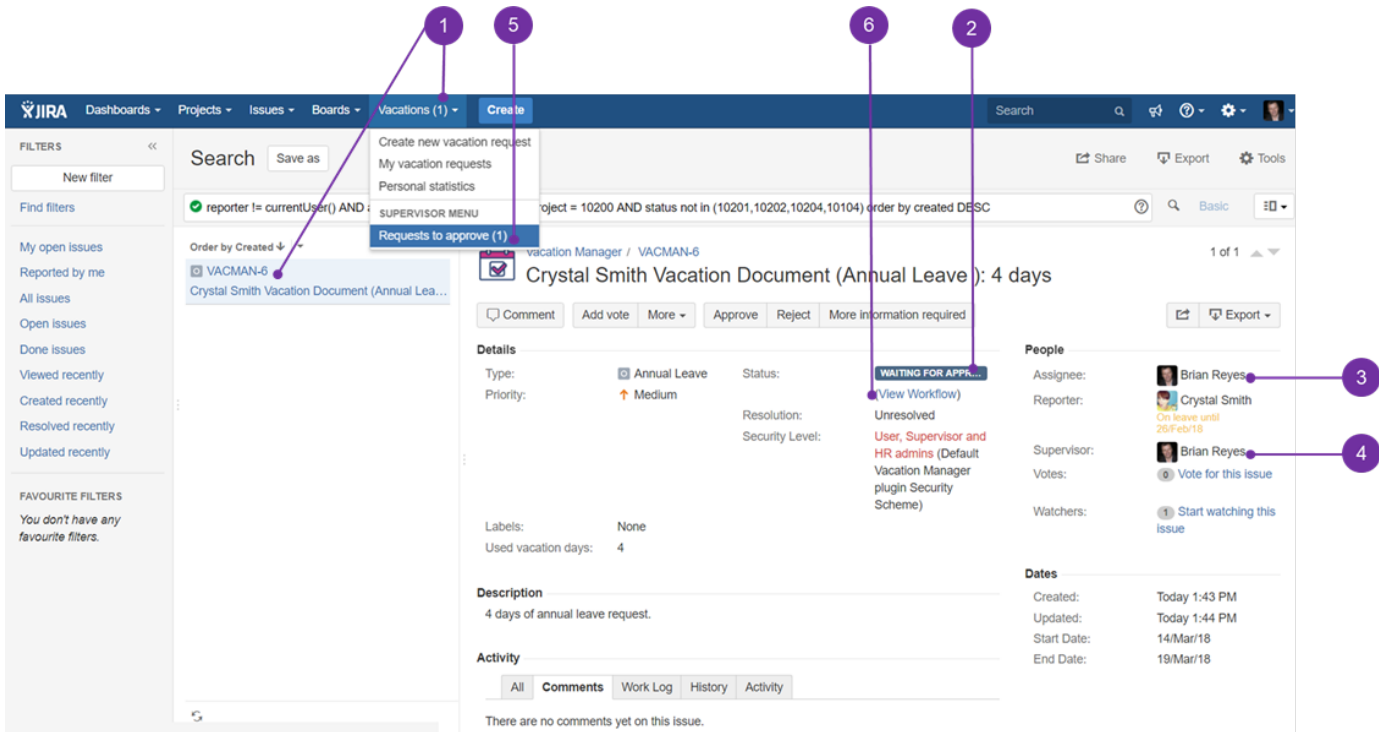
Next Vacation Manager Supervisor - [Processing submitted Vacation Documents](#)

Processing submitted Vacation Documents [1.3.x]

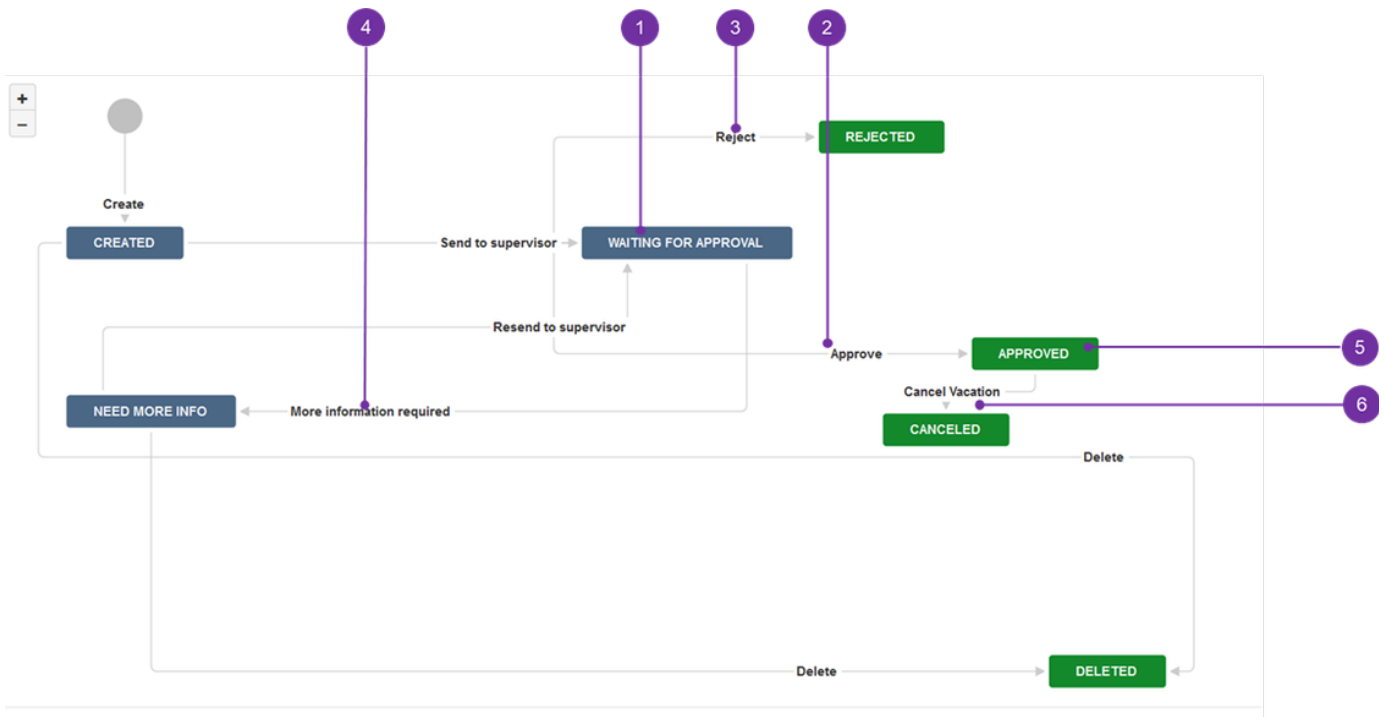
Displaying list of Vacation Documents waiting for your action

As a supervisor (4) you need to review and process all incoming Vacation Document that are assigned to you (3). Each time it happens you get a notification not only via e-mail, but also in the supervisor's menu. There you can directly see how many of such requests have been sent (1). To check all your pending Vacation Documents go to [Navigation Bar Menu](#) [Supervisor Menu](#) [Requests to approve](#) (5).

i Reference (1) has been marked with multiple pointers to underline that any new delivered request, to a manager, with a status "waiting for approval" (2) is indicated in the menu positions with a number in a bracket. If supervisor doesn't respond immediately, then number in the bracket is to increase correspondingly to the number of issues with aforementioned "waiting for approval" status.



From this screen you will be able to perform actions on selected Vacation Document. To get a view like the one below, click on "View Workflow" (6):



As marked with digits on workflow attached above, Supervisor have access to two states in Vacation Document:

★ I Waiting for approval (1) - from here Supervisor can:

- **Approve (2)**- approves vacation request,
- **Reject (3)**- rejects vacation request,
- **More info required (4)**- send vacation document back to User for more info/correction. Supervisor comment is required on this step,

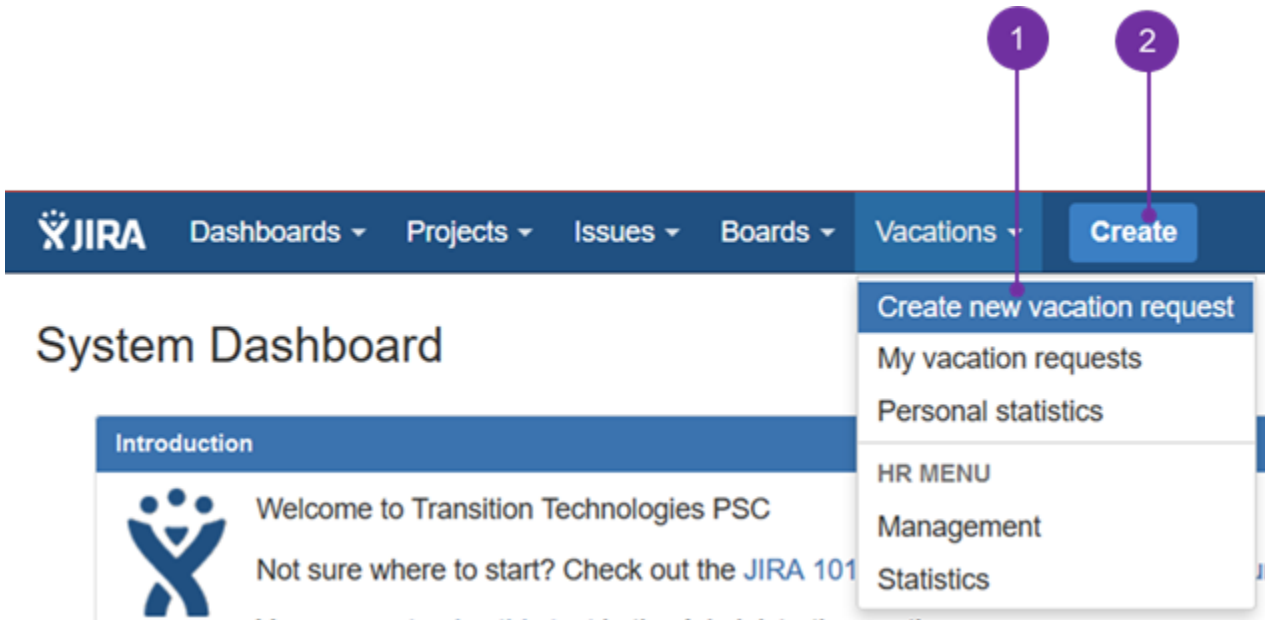
★ II Approved (5) - after accepting document:

- **Cancel Vacation (6)** - cancels document and returns all reserved vacation days for user.

Next Vacation Manager User - [Request user vacations](#)

Request user vacations [1.3.x]

To create new Vacation request click *Create* (1) button on JIRA navbar or *Create new vacation request* (2) depend of the view you are dialog box will appear or you will be redirected. If you were redirected, at first select proper project (VACMAN) and choose vacation type you want to create.



after selecting "Create new vacation request" you will directly see "Create Vacation Document" screen.


A screenshot of the 'Create Vacation Document' form. The form has a light gray background and a white border. It contains two dropdown menus: 'Project' with 'Vacation Manager (VACMAN)' selected and 'Vacation Type' with 'Annual leave' selected. Below the dropdowns are two buttons: 'Next' and 'Cancel'.

after that you will see a create document view. Dialog box view may be very similar to the below one.

Create Vacation Document

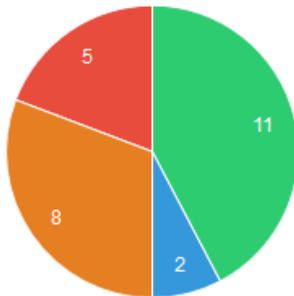
Project **Vacation Manager**

Vacation Type **Annual leave**

Supervisor* 


Start typing to get a list of possible matches.


Statistics



Category	Count
Available days	11
Chosen days	2
Reserved days	8
Used days	5

Showing data for period: -

Start Date* 


End Date* 

Details

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

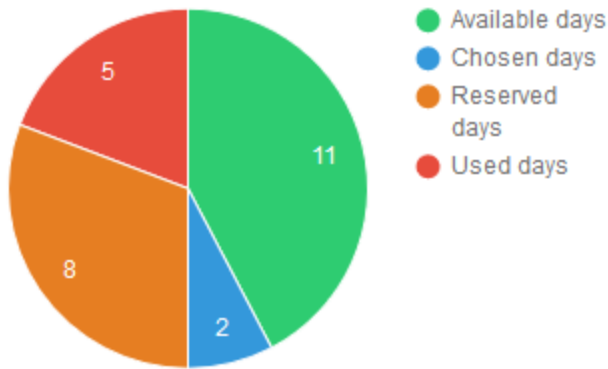
To create new request you have to fill some obligatory fields:

- **Supervisor** - select a 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.

 Details field is a non required one, with a possibility to place a comment about particular vacation request.

Statistics diagram shows four values as in the below picture:

Statistics



Showing data for period: -

- **Available days** - days available to use withing particular vacation type,
- **Reserved days** - documents are created for this number of days, awaiting user's supervisor decision,
- **Used Days** - document(s) is/are accepted for displayed number of days,
- **Chosen days** - number of days between chosen start and end dates.

⚠ After you click create button, you have to remember that request won't be sent automatically to supervisor. You need to send it yourself in issue details using *Send to supervisor* button and then await feedback

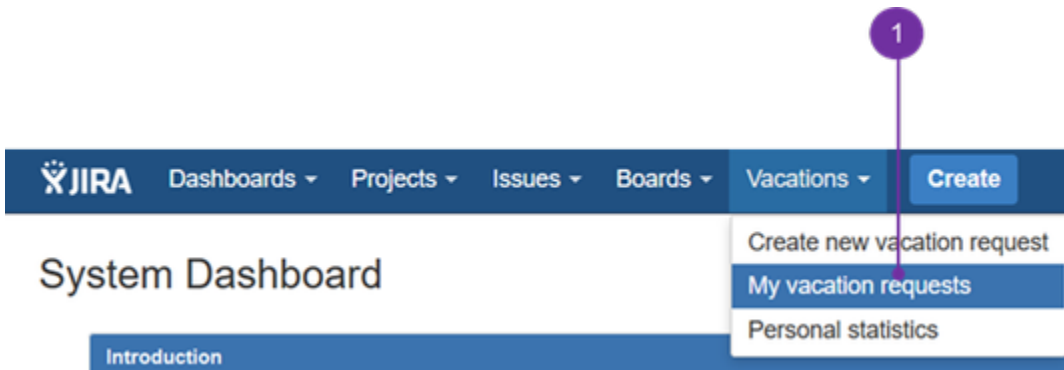
Next Vacation Manager User - [Status of user Vacation Documents](#)

Status of user Vacation Document [1.3.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 requests* (1).



There user can select Vacation Document and check its **Status** field (2).

The screenshot shows the JIRA interface for a vacation document titled "Crystal Smith Vacation Document (Annual Leave) : 1 days". The status is "WAITING FOR APPR..." (Waiting for approval). The document is assigned to Brian Reyes, reported by Crystal Smith, and is currently unresolved. The status bar at the top right shows "1 of 8". A purple circle with the number "2" points to the "WAITING FOR APPR..." status label.

Example of **Waiting for approval** document.

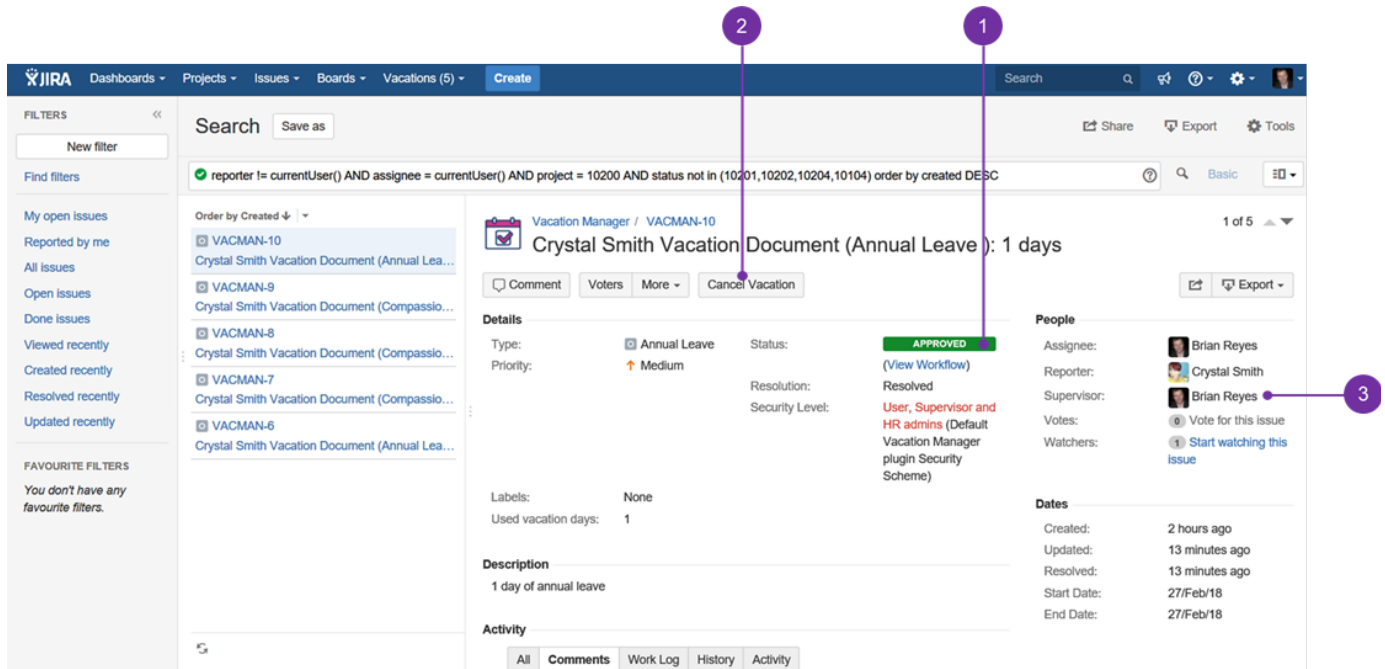
"Need more info" status

In case supervisor sends back document to user (1), user must check supervisor's comment, provide more information/correct fields if needed and send it back to supervisor.

The screenshot shows the JIRA interface for the same vacation document. The status is "WAITING FOR APPR..." (Waiting for approval). The document is assigned to Brian Reyes, reported by Crystal Smith, and is currently unresolved. The status bar at the top right shows "1 of 5". A purple circle with the number "1" points to the "More information required" button in the top right corner of the document view.

Cancelling approved Vacation Document

Accepted Vacation Document can be cancelled (2), but only Supervisor who approved (1/3) it can do this. In this case user must contact his supervisor and ask to cancel his/her approved vacations.



Next Vacation Manager User - [User Statistics](#)

User Statistics [1.3.x]

Here (1) you can get statistics of all Vacation Types. You can obtain information like: graphical timeline of user's used days (you can use mouse scroll to zoom in/out and drag to move zoomed view) (2), list of all [Vacation Definitions](#) for every Vacation Type, all Vacation Documents for Vacation Definitions (3), available, used and carryover days for Vacation Definitions (4).

The screenshot shows the JIRA Vacation Manager interface. At the top, there's a navigation bar with 'Vacations' and 'Create' buttons. Below that, the 'Vacation Manager' header is visible with 'Key: VACMAN' and 'Lead: amberdavis'. The main content area is titled 'Personal statistics' for user 'Crystal Smith'. It shows a date range from '2018-02-27' to '2018-04-30'. A calendar view displays vacation periods: 'Compassionate Leave' (1 day), 'Spring Break' (14 days), and 'Annual Leave' (1 day). Below the calendar, there are three sections, each with a table and a pie chart:

- Vacation kind: Compassionate Leave**

Start date	End date	Available Days	Carryover Days	Used Days	Vacation documents
2018-02-21	2018-12-31	5	0	5	2 document(s)
- Vacation kind: Spring Break**

Start date	End date	Available Days	Carryover Days	Used Days	Vacation documents
2018-03-01	N/A	0	0	14	1 document(s)
- Vacation kind: Annual Leave**

Start date	End date	Available Days	Carryover Days	Used Days	Vacation documents
2018-01-01	N/A	25	0	1	1 document(s)

At the bottom of the interface, there's a footer with 'Atlassian JIRA Project Management Software (v7.7.1#77002-sha1 e75ca93)' and 'Powered by a free Atlassian JIRA evaluation license. Please consider purchasing it today.'

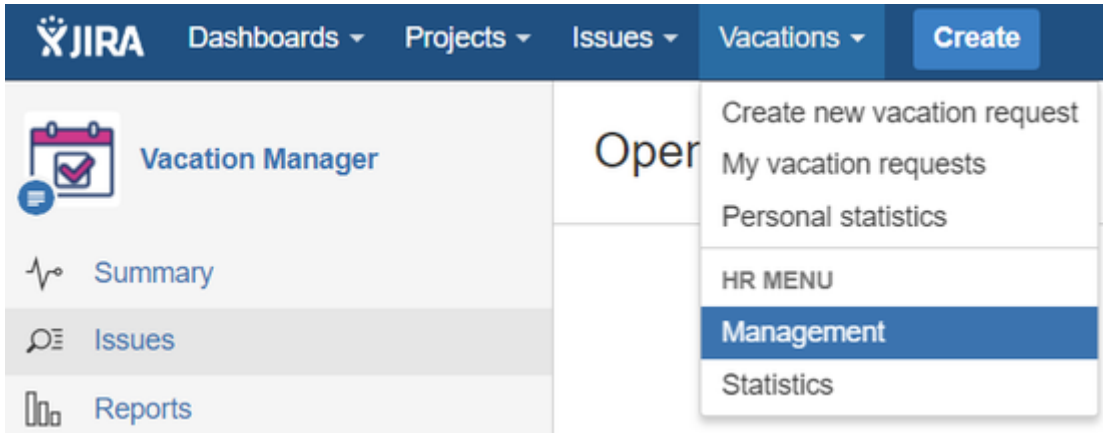
User, HR Staff and Supervisors Management [1.3.x]

In Vacation Manager 1.3.x, please log as a HR group member. Whilst being logged as such, you can assign colleagues with appropriate to their role privileges:

⊗ Difference between version 1.2.x and 1.3.x

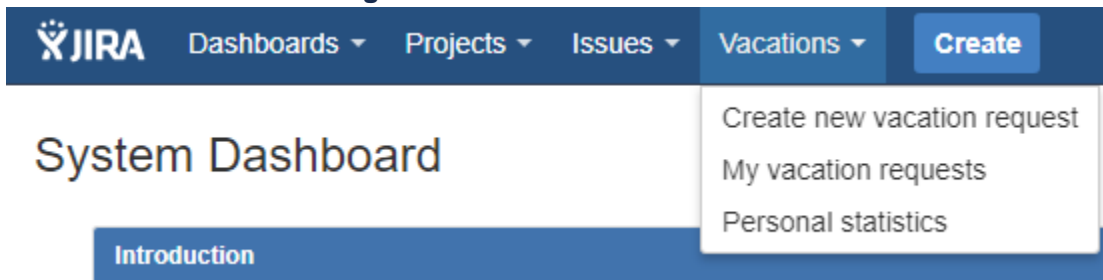
One of key differences between versions 1.2.x and 1.3.x is how user from HR group can assign particular roles to his/her coworkers. In the earlier one, it was Jira group dependent thing that could have been configured by Jira administrator. In the recent version, it is done solely by HR group member and it is not a Jira's group thing.

★ The only menu, which is dependent of Jira's groups is HR Menu. To do all the below, one needs to be assigned by Jira administrator, to Jira's group responsible for HR matter (it is done during Vacation Manager initialization after it is installed):

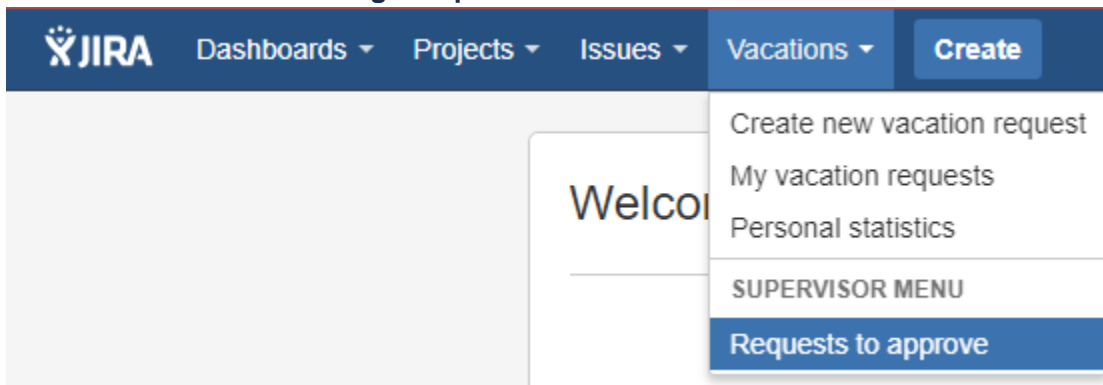


★ Whilst being logged as an HR group member, please do the below to grant particular user(s):

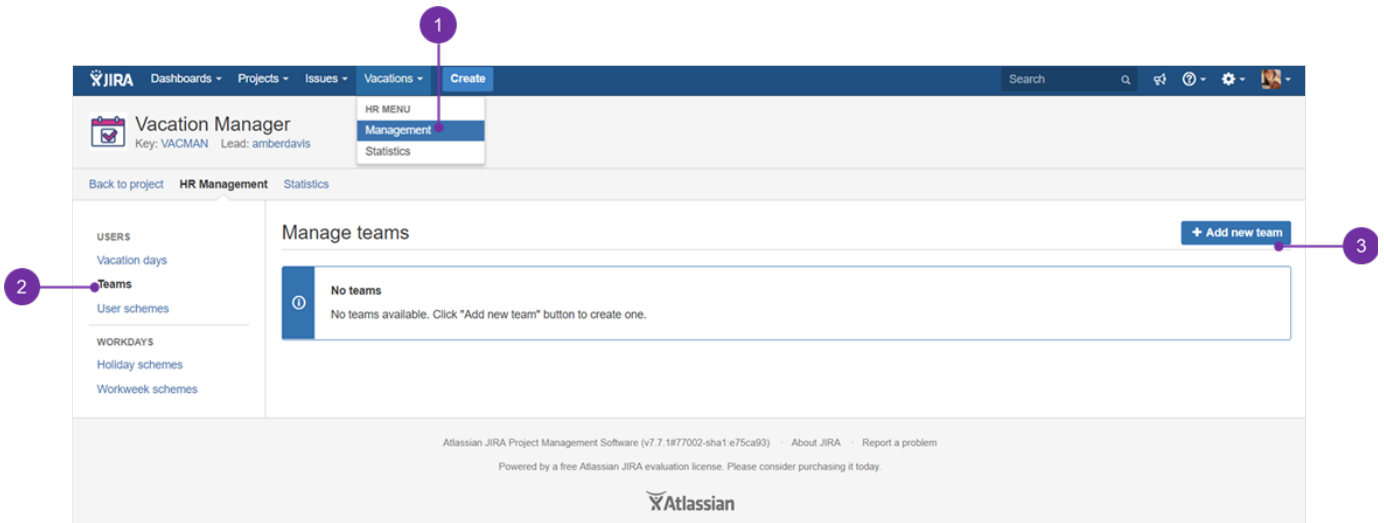
Access to Vacation's Manager user menu



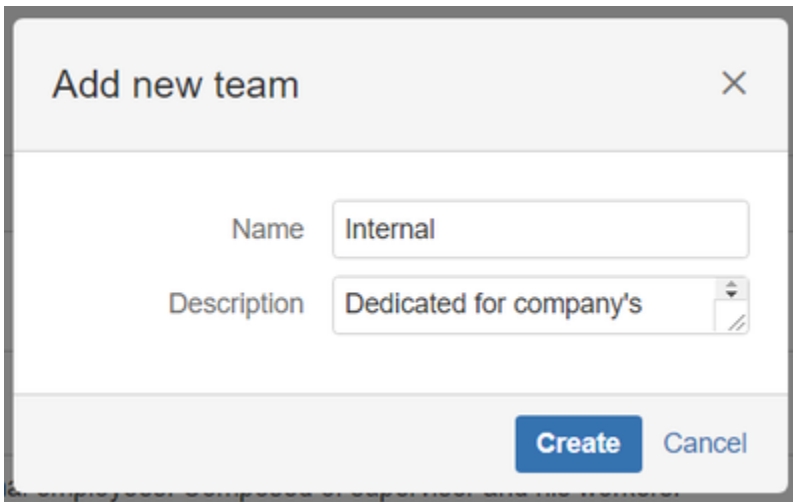
Access to Vacation's Manager supervisor menu



Directly after the add-on installation, such menus menu won't be visible. To get similar view please go to Management (1), access Teams (2). Now you can decide what team you want to create (3). Name should fit its office role (e.g. Service Desk Team)



As stated earlier - to get an access Vacation's Manager user menu, you can name the team as illustrated below, then please click on "Create" button:



Now you should get similar appearance:

The screenshot displays the 'Edit team: Internal' interface. On the left sidebar, the 'Internal' team is selected under the 'TEAMS' section. The main content area is divided into three sections: 'Team details', 'Supervisors', and 'Users'. The 'Supervisors' section contains a table with one entry for Brian Reyes. The 'Users' section contains a table with two entries for Alana Grant and Amber Davis. Callout (1) points to the 'Internal' team in the sidebar. Callout (2) points to the '+ Add supervisor' button in the top right of the Supervisors section. Callout (3) points to the '+ Add user' button in the top right of the Users section.

Accessed team's edition is displayed on the left hand side (1). As name suggests - button for adding a supervisor is entitled in proper manner (2). The same goes for adding a user button (3).

When appropriate users (or teams) are added by using mentioned above buttons, then its members will be able to see dedicated menu, presented on the top off this page.

i After clicking on "Add Supervisor", or "Add user" you can also add Jira's whole team. By doing so, if you've upgraded from 1.2.x to 1.3.x, then it's possible to add to teams previously made groups, with already added people:

The 'Add members to team' dialog box is shown. It has a title bar with a close button. Below the title, there are two rows of options: 'New members role' with 'User' selected, and 'Type' with 'Users' and 'Groups' radio buttons. Below that is a text input field labeled 'Groups to add' containing the text 'vacman-users'. At the bottom of the dialog are two buttons: 'Add' and 'Cancel'.

Next Vacation Manager HR Management - [Managing holidays and workdays](#)

Teams [1.3.x]

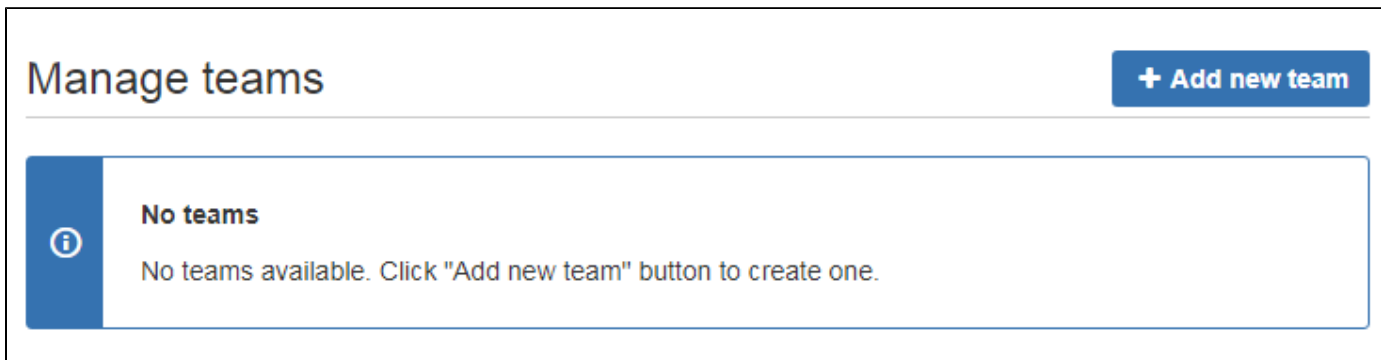
Since version 1.3.0, we replaced JIRA groups with teams. It adds an ability to create multiple teams, each with its own users and supervisors. Both consists of standard Jira Users or Jira Groups.

You can access this panel as HR User from [Navigation Bar Menu](#) *Management* *Teams*

✖ Very important!
Without member(s) added to a team, HR member will not be able to assign particular user(s) with any leave type via "Add vacation" button. Such user(s) simply will stay invisible for HR.

Adding a new team

Before you can fully explore Vacation Manager and its features, first you need to create your first Team. You can do this by using *Add new team* button on *Team Management* panel.



After creating your team, you will be redirected to new team edit page where you are able to manage users in it.

Managing team members

To add, or remove users, first you need to find your team in *Team Management* panel and click *Edit* to access *Edit team* panel.

Edit team: APDC Developers Delete

Team details Edit

Name: APDC Developers
Description: Atlassian plugin developers

Supervisors + Add supervisor

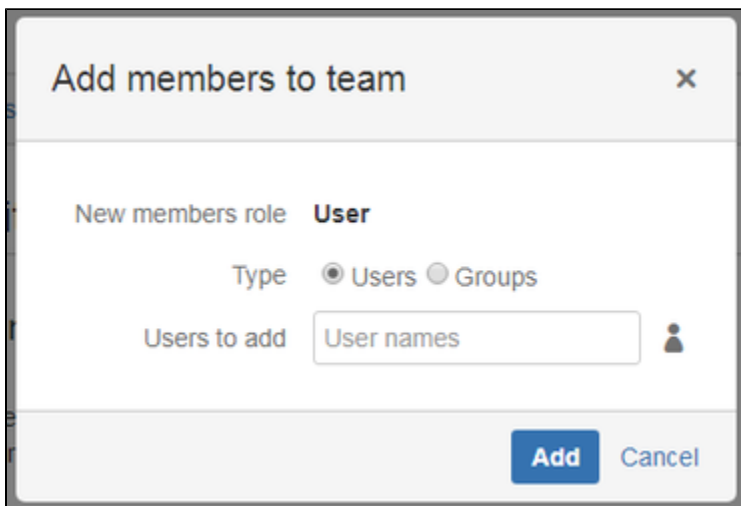
No supervisors
There are no supervisors in this team. Click "Add supervisor" button to add one.

Users + Add user Bulk operations (0 rows) ▾

No users
There are no users in this team. Click "Add user" button to add one.

Adding members


For each team you can add supervisors and users using *Add supervisor* and *Add user* buttons.



Add members to team ×

New members role **User**

Type Users Groups

Users to add 

Add Cancel

Here you can choose if you want to add users or whole groups. In both cases you can manually specify one, either more user or group names. The same goes for open user/group picker, by clicking icon next to input field.

Removing members

As there are two ways to add members to a team (using single picked users, or with groups), you need to be aware that there also two methods to remove members from team.

Supervisors			
Full name	Username	Added with	Operations
admin	admin admin@admin.com	<ul style="list-style-type: none"> manually vacman-supervisors 	Remove user
Supervisor Ethan	supervisor3 ethan@mail.com	<ul style="list-style-type: none"> vacman-supervisors 	
Supervisor George	supervisor george@mail.com	<ul style="list-style-type: none"> vacman-supervisors 	
Supervisor John	supervisor2 john@mail.com	<ul style="list-style-type: none"> vacman-supervisors 	
Supervisor Lucy	supervisor4 lucy@mail.com	<ul style="list-style-type: none"> vacman-supervisors 	
Supervisor William	supervisor5 william@mail.com	<ul style="list-style-type: none"> vacman-supervisors 	
User Jack	user jack@mail.com	<ul style="list-style-type: none"> manually 	Remove user

Showing 1 to 7 of 7 entries Previous 1 Next

Groups: vacman-supervisors ✕

As you can see on screenshot above, some users were added using groups (like Supervisor Ethan), while some by using single user add (User Jack). As for the rest - by using both previous methods (admin).

To remove any of them, when:

- member was added using user addition - simply click *Remove user* in his *Operations* column,
- member was added using group addition - you can remove these users' group from team (using X button on group in a table like the one above). **Warning:** this will also remove from team all users that were added using this group. So, if you want to add all users from selected group excluding only one user from it, then you need to add them manually by using user addition,

If user was added with both ways: with group and as a single user then you have to remove it both ways.

Managing holidays and workdays [1.3.x]

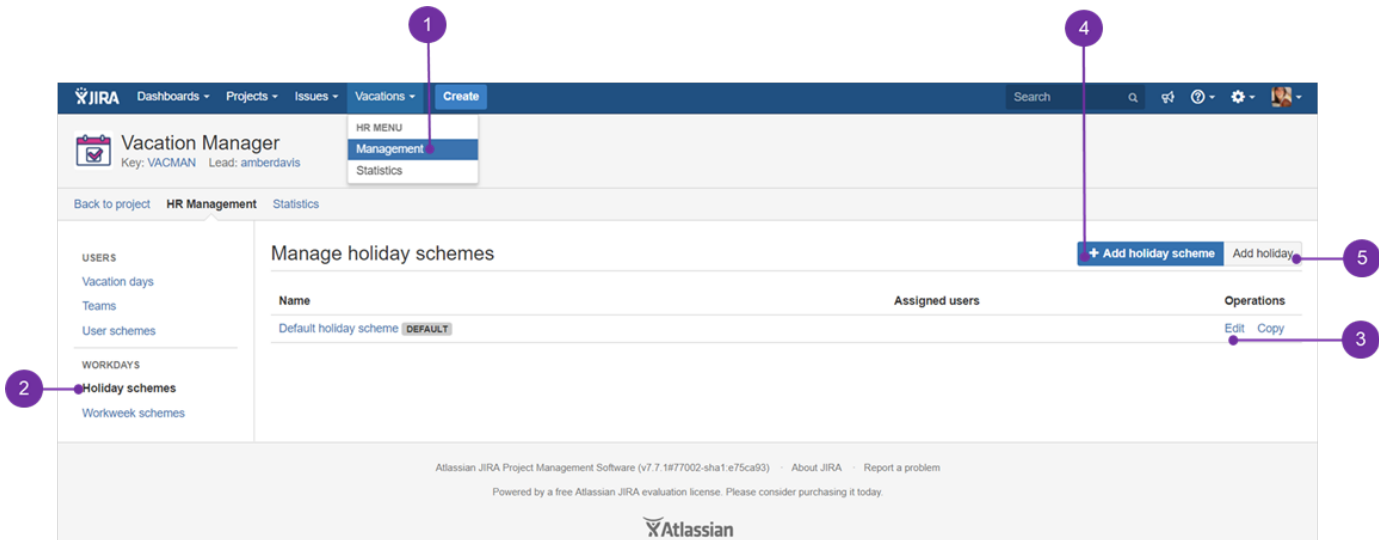
HR users can define days off that will not count to used days when creating new Vacation Document. Every created holiday can be defined as one time only, or recurring (e.g. New Year's Eve that reoccur every year at the same date). In case of workdays - HR creates schemes of non working days of week, that can be assigned to different users.

Holidays management

While being logged as a member of HR group (Jira HR group picked at initialization), from *Navigation Bar Menu* go to *Management (1) Holiday Schemes (2)*. To make changes, click on click "Edit" hyperlink (3)

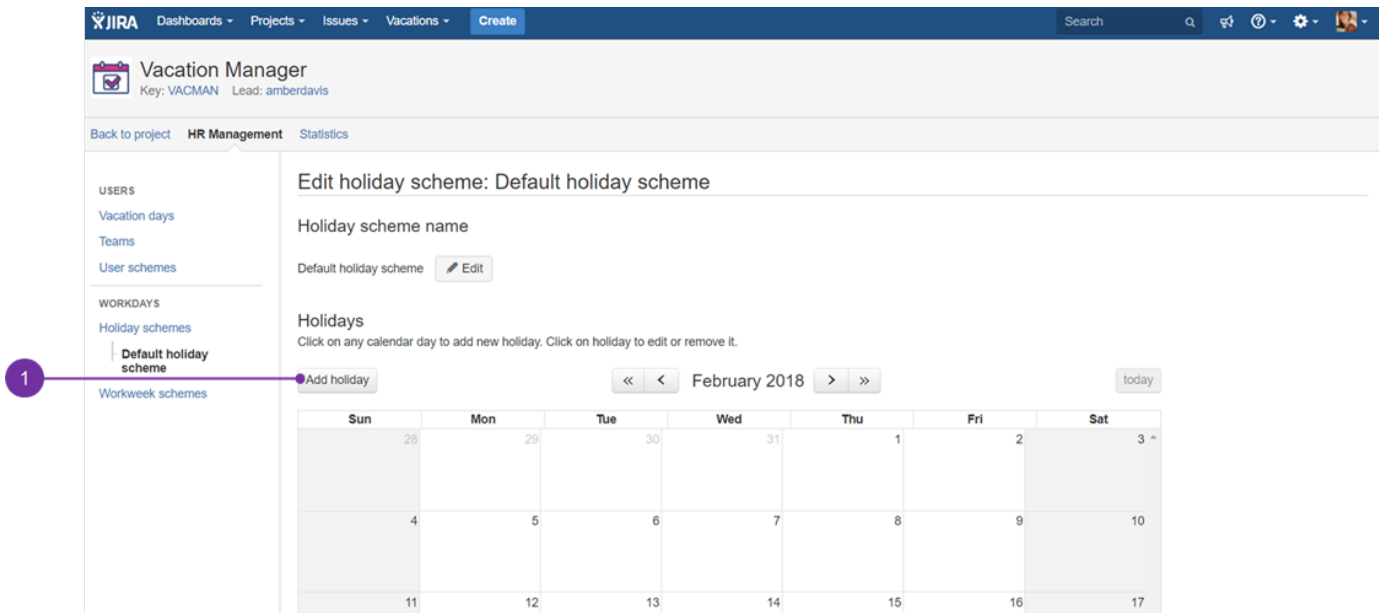
i Edition button for a holiday scheme is also visible after clicking on a desired scheme's name. If you do not wish to go with creation of new holiday scheme(s) and assign particular users to it, then fast track mode is enough for you (i.e. working only on Default holiday scheme). In such case, you may use "Add holiday" button (5) on that step directly, to add off-work day to the desired scheme's calendar.

i To create a new holiday scheme, please go to "Holiday Schemes" (2) and here you can add a new one. After pressing "Add holiday scheme" button (4). In the appeared prompt just type its name and press add. To populate it with off-work days, follow the below steps.



Adding new holiday

When editing a desired holiday scheme, you should see a similar view, like the one below. To add a day that will not be treated as a compulsory working one, please use "Add holiday" button:



Prompt should appear:

Day: 2018-01-01
Name: New Year's Eve
Type: One time Yearly
Add to: Default holiday scheme
Add Cancel

To add new holiday you can also click on desired day in calendar and then fill up its name, Next, choose holiday type: **One time** - for selected year only, **Yearly** - for all years in selected day. Be advised - this can be done whilst being in edition mode of particular holiday scheme.

After filling in all necessary options and deciding if the event should reoccur every year, you can press "Add" button to place it in the calendar of a particular holiday scheme (1):

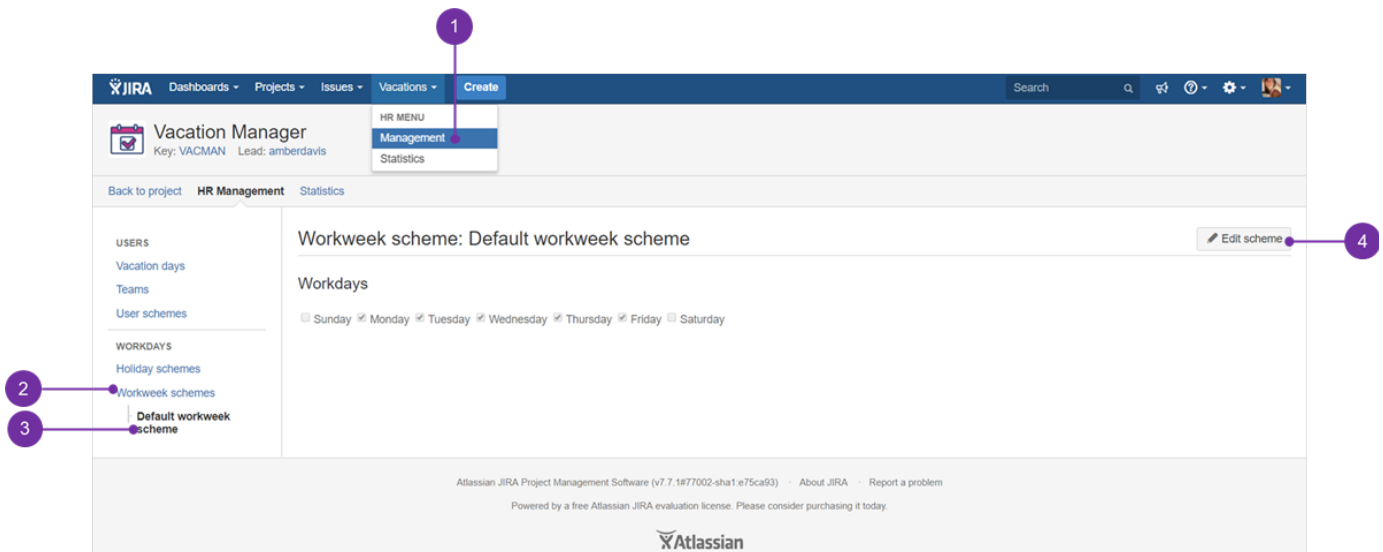
Holidays
Click on any calendar day to add new holiday. Click on holiday to edit or remove it.
Add holiday << < January 2018 > >>
Successfully added holiday "New Year's Eve" to 1 holiday scheme(s).
Sun 31 Mon 1 Tue 2 Wed 3 Thu 4 Fri 5 6
New Year's Eve
7 8 9 10 11 12 13
14 15 16 17 18 19 20
21 22 23 24 25 26 27
28 29 30 31 1 2 3
4 5 6 7 8 9 10

Removing existing holiday

To remove holiday, simply click its name on calendar and in "Edit holiday" prompt click the "Remove" button.

Workdays

Access to Workdays schemes, its creation and edition is quite similar:



Whilst being logged as a Jira's HR group user, from [Navigation Bar Menu](#) go to *Management* (1) *Workweek Schemes* (2). Now you can access workdays scheme's name to view it, or click "Edit" hyperlink directly. Currently viewed/edited workweek scheme is displayed below "Workweek schemes" (3). Whilst being in read only mode, you can quickly switch to edition by pressing "Edit scheme" (4) button.

i You can choose what days of week will be marked as workdays. Every unticked day will be treated as a bank holiday and thus not taken out from user's total (e.g. yearly annual leave) quota.

After any changes made, you need to click *Update workdays* button to apply them in your system. By default, any day of week (except Saturday and Sunday) is set as a working day.

Next Vacation Manager HR Management - [Managing Vacation Definitions](#)

Upgrade tips

- [Upgrade to Vacation Manager 1.1.1](#)
- [Upgrade to Vacation Manager 1.2.0](#)
- [Upgrade to Vacation Manager 1.3.0](#)


Upgrade 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 (earlier than v1.1.1) 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

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
<input type="radio"/> Permission Validator	Validates that the user has a permission.
<input type="radio"/> User Permission Validator	Validates that the user has a permission, where the OSWorkflow variable holding the username is configurable. Obsolete.
<input type="radio"/> VACMAN: Comment Validator	Comment must be provided by Supervisor at least once.
<input checked="" type="radio"/> VACMAN: Reporter Validator	Validates reporter field and checks if it is in vacation manager users group
<input type="radio"/> VACMAN: Supervisor Validator	Validates supervisor field and checks if it is not equal reporter field
<input type="radio"/> VACMAN: Vacation Days Validator	Validates vacation days numbers

h. just added validator should appear on validators list.

 You are editing a draft workflow. [View original](#)

[Workflows](#) / [VACMAN Vacation Manager Workflow \(Draft\)](#)









Transition: Create

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

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

[Add validator](#)

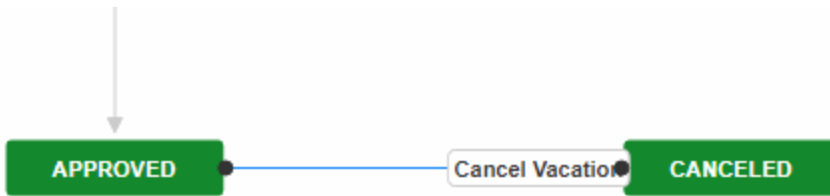
The transition requires the following criteria to be valid

-   Only users with **Create Issues** permission can execute this transition.
-   Validates if reporter is not the same as selected supervisor
-   Validates vacation days numbers using "**Start Date**" and "**End Date**" custom fields
-   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



b. In **Screen** field choose **VACMAN Comment screen**

Edit Transition

Name*

Description

Screen

- c. Click **Save**
- d. Click **Publish Draft** to save and publish workflow changes
- e. Select **Yes** to save backup copy

Publish Draft Workflow

Info You are about to publish the workflow **VACMAN Vacation Manager Workflow (Draft)**. This will overwrite the active workflow **VACMAN Vacation Manager Workflow** and remove the draft! Click Publish if you want to continue.

Save a backup copy? Yes No

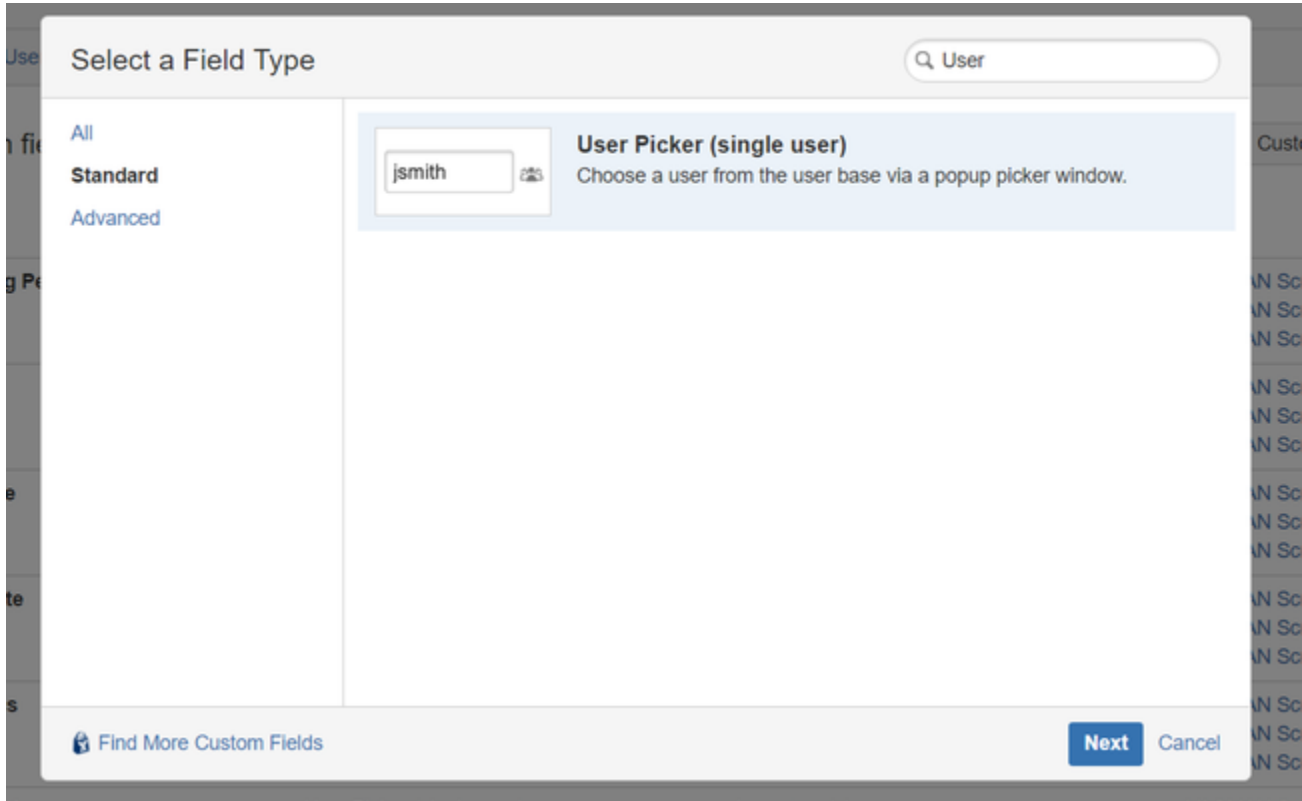
Backup workflow name*
Please use only ASCII characters.

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 "Substitute 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 its 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	<input type="checkbox"/>
Resolve Issue Screen	Field Tab	<input type="checkbox"/>
VACMAN Comment screen	VACMAN Comment Field Tab	<input type="checkbox"/>
VACMAN Screen Create	VACMAN Create Field Tab	<input checked="" type="checkbox"/>
VACMAN Screen Edit	VACMAN Edit Field Tab	<input checked="" type="checkbox"/>
VACMAN Screen View	VACMAN View Field Tab	<input checked="" type="checkbox"/>
Workflow Screen	Field Tab	<input type="checkbox"/>

- 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: Supervisor
Maps selected custom field as supervisor field

Coverage person: Covering Person

Used vacation days: Covering Person
Supervisor

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**

ATLASSIAN MARKETPLACE
Find new add-ons
Manage add-ons

VACATION MANAGER
Configure
Vacation Types

Configure Vacation Manager

Project: Vacation Manager
JIRA project used by Vacation Manager

Auto-summary: YES NO
Summary for new Vacation Documents will be hidden and filled automatically.

Auto-summary text:
You can use special variables: {reporter} {supervisor} {startDate} {endDate} {vacationDays} {vacationType} {details}

HR manage Users: YES NO
Allows HR to modify users in Vacation Manager Users group.

HR manage Supervisors: YES NO
Allows HR to modify users in Vacation Manager Supervisors group.

Recalculate vacations: Recalculate now
All recurring vacation calculations will be fired everyday at specified hour. Last fire time: {0}

User vacation warning: YES NO
Show warning near User Picker fields when user is currently out on vacation.

Save

Groups

Users group: vacman-users

Supervisors group: vacman-supervisors

HR group: vacman-hr

Edit groups

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

Users group Sets users group in Vacation Manager.

Supervisors group Sets supervisor group in Vacation Manager.

HR group Sets HR group in Vacation Manager.

Create new schemes YES NO
Creates and assigns new Security and Permission Schemes for Vacation Manager project. Old schemes will be left intact

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](#).

Upgrade 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**)

The screenshot shows the JIRA Administration interface. The top navigation bar includes 'Administration', a search box for 'Search JIRA admin', and a notification icon. Below this is a secondary navigation bar with tabs for 'Applications', 'Projects', 'Issues' (which is active), 'Add-ons', 'User management', and 'System'. On the left side, there is a sidebar menu with categories: 'ISSUE TYPES' (Issue types, Issue type schemes, Sub-tasks), 'WORKFLOWS' (Workflows, Workflow schemes), 'SCREENS' (Screens, Screen schemes, Issue type screen schemes), 'FIELDS' (Custom fields, Field configurations, Field configuration schemes), and 'ISSUE FEATURES' (Time tracking, Issue linking). The main content area is titled 'Associate field Attachment to screens'. It contains a descriptive paragraph: 'Associate the field Attachment 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.' Below this is a table with three columns: 'Screen', 'Tab', and 'Select'. The table lists several screens and their associated tabs, with checkboxes in the 'Select' column. At the bottom of the table are two buttons: 'Update' and 'Cancel'.

Screen	Tab	Select
Default Screen	Field Tab	<input checked="" type="checkbox"/>
Resolve Issue Screen	Field Tab	<input type="checkbox"/>
VACMAN Comment screen	VACMAN Comment Field Tab	<input type="checkbox"/>
VACMAN Screen Create	VACMAN Create Field Tab	<input checked="" type="checkbox"/>
VACMAN Screen Edit	VACMAN Edit Field Tab	<input checked="" type="checkbox"/>
VACMAN Screen View	VACMAN View Field Tab	<input checked="" type="checkbox"/>
Workflow Screen	Field Tab	<input type="checkbox"/>

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**

ATLASSIAN MARKETPLACE
Find new add-ons
Manage add-ons

VACATION MANAGER
Configure
Vacation Types

Configure Vacation Manager

General

Project: Vacation Manager
JIRA project used by Vacation Manager

Auto-summary: YES NO
Summary for new Vacation Documents will be hidden and filled automatically.

Auto-summary text:
You can use special variables: \$\${reporter} \$\${supervisor} \$\${startDate} \$\${endDate} \$\${vacationDays} \$\${vacationType} \$\${details}

HR manage Users: YES NO
Allows HR to modify users in Vacation Manager Users group.

HR manage Supervisors: YES NO
Allows HR to modify users in Vacation Manager Supervisors group.

Recalculate vacations: Recalculate now
All recurring vacation calculations will be fired everyday at specified hour. Last fire time: {0}

User vacation warning: YES NO
Show warning near User Picker fields when user is currently out on vacation.

Save

Groups

Users group:

Supervisors group:

HR group:

Edit groups

a

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

Users group:
Sets users group in Vacation Manager.

Supervisors group:
Sets supervisor group in Vacation Manager.

HR group:
Sets HR group in Vacation Manager.

Create new schemes: YES NO
Creates and assigns new Security and Permission Schemes for Vacation Manager project. Old schemes will be left intact

Save **Cancel**

b

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](#).

Upgrade to Vacation Manager 1.3.0

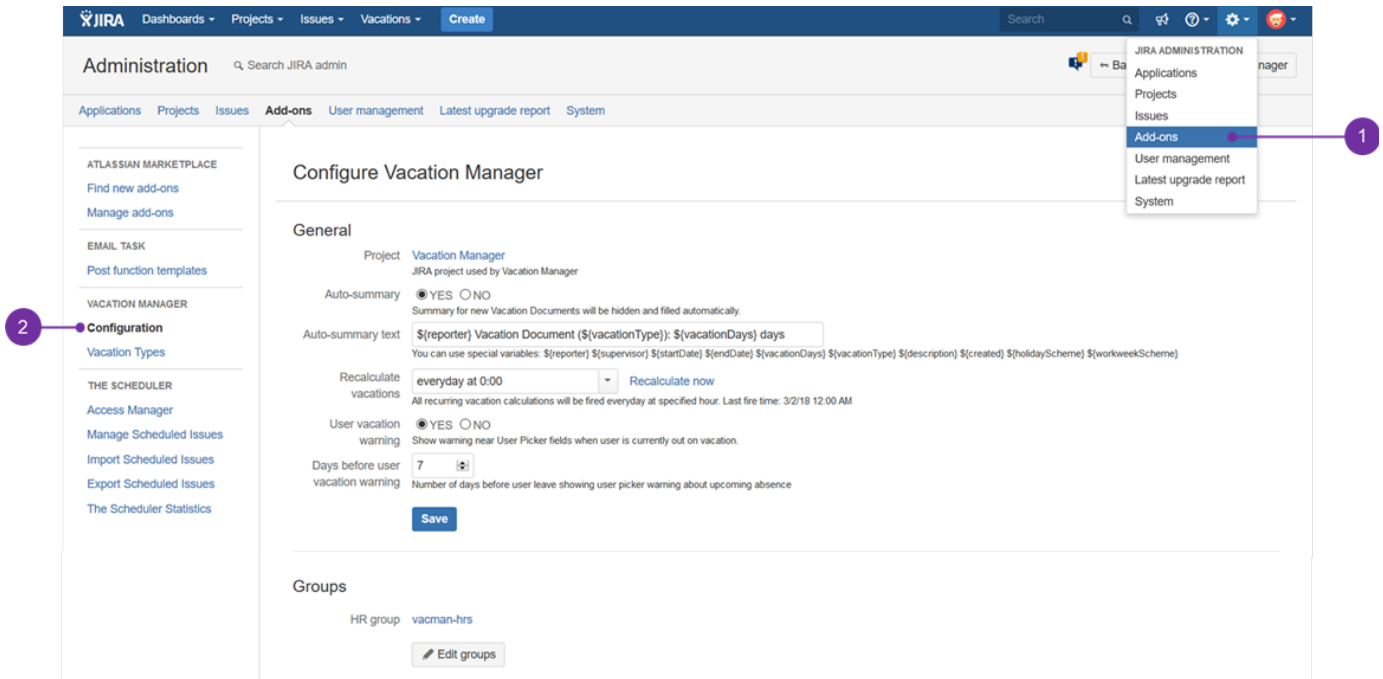
Upgrading from versions older than 1.2.0

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 Directly after upgrading to 1.3.x you can still spot that Jira groups created in 1.2.x version of the add-on are still present and if the below steps won't be undertaken, it'll still be possible to manage users' access to particular menus (user, HR, supervisor).

i Before being able to do the below steps, first you need to install version 1.3.x of the add-on, then please access Add-ons (1) and then Vacation's Manager Configuration (2).

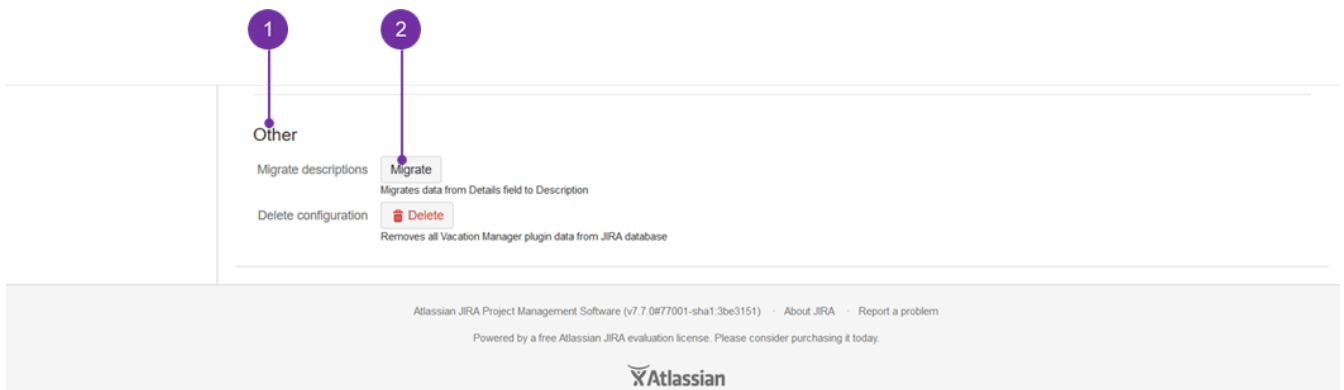


★ For the rest of the steps presented below (1 - 5), please uncloak needed step (note that they were put in an order that you should follow accordingly and **do not omit any of it**):

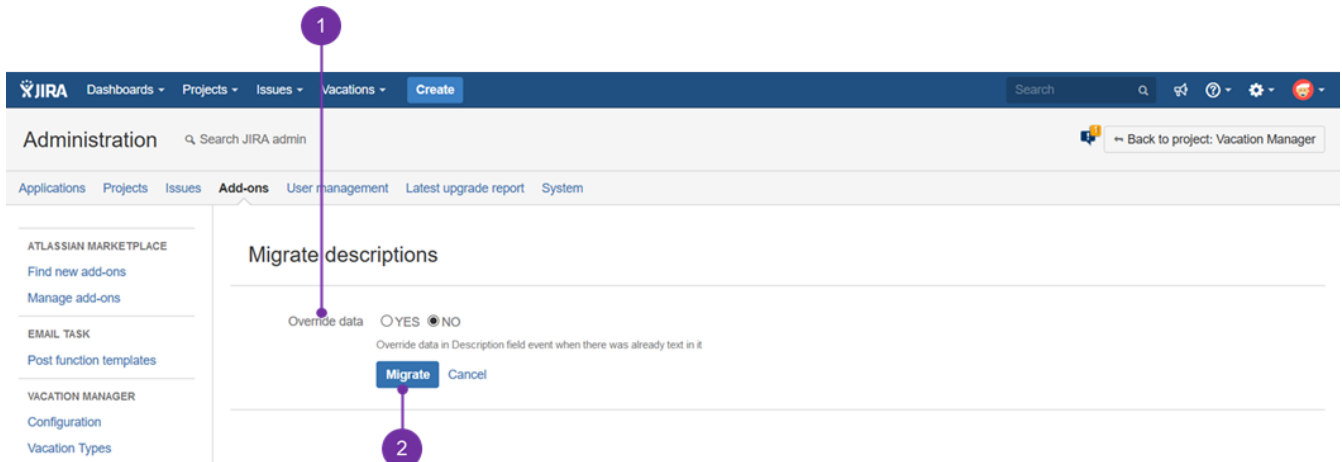
1. Migrate field "Details" to "Description"

▾ details

a. In Vacation Manager configuration panel scroll down to the section named **Other** (1) and click **Migrate** (2) (Migrate descriptions) button"



b. On the next screen you can choose if you want to overwrite data (1) in description field if it is not empty (by default "no" is preselected):



c. Click **Migrate (2)** to complete migration process

i Migration process will modify description fields **only** in issues in Vacation Manager project. Other projects' with their description fields are to remain intact.

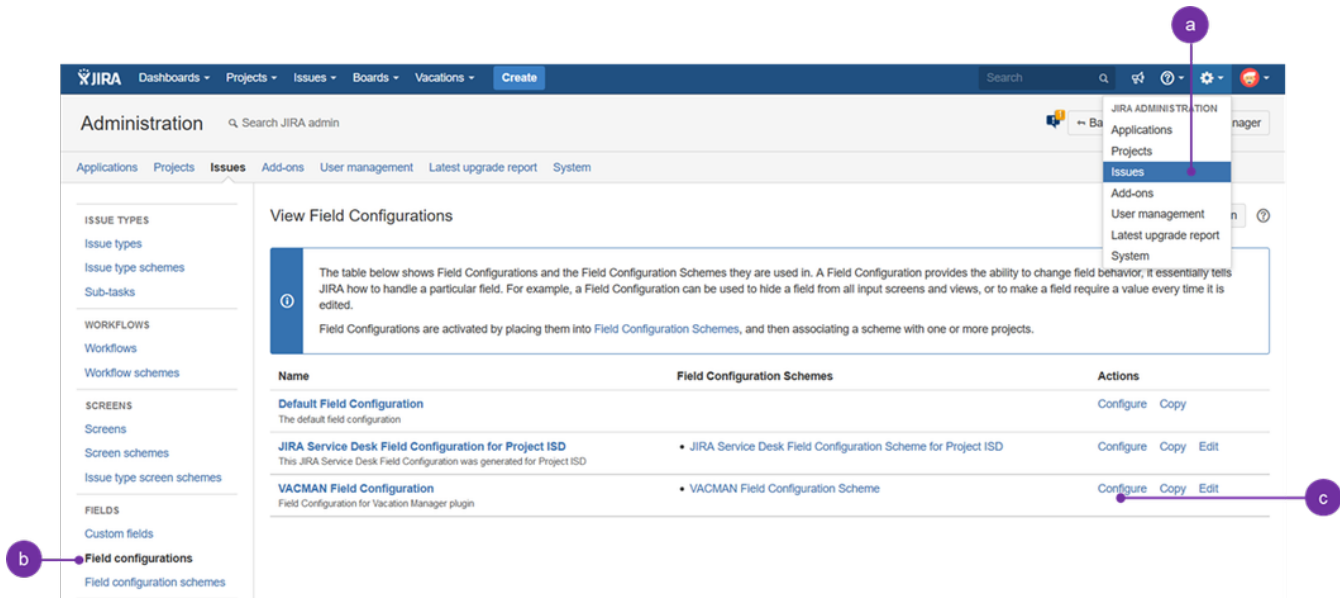
2. Add field "Description" to "VACMAN Field Configuration".

▼ 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

d

<p>Description [Wiki Style Renderer]</p>	<ul style="list-style-type: none"> • Default Screen • ISD: JIRA Service Desk Screen • ISD: JIRA Service Desk: Change Create Issue Screen • ISD: JIRA Service Desk: Change View/Edit Screen • ISD: JIRA Service Desk: Incident Create Issue Screen • ISD: JIRA Service Desk: Incident View/Edit Screen • ISD: JIRA Service Desk: Problem Create Issue Screen • ISD: JIRA Service Desk: Problem View/Edit Screen • ISD: JIRA Service Desk: Request Fulfilment Create Issue Screen • ISD: JIRA Service Desk: Request Fulfilment View/Edit Screen • PM: Project Management Create Issue Screen • PM: Project Management Edit/View Issue Screen • SSD: Scrum Bug Screen • SSD: Scrum Default Issue Screen 	Edit Hide Required Screens Renderers
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e. Check all three **Create/Edit/View screens** used by Vacation Manager (by default: **VACMAN Screen Create**, **VACMAN Screen Edit**, **VACMAN Screen View**)

Administration Search JIRA admin

Applications Projects **Issues** Add-ons User management System

ISSUE TYPES

[Issue types](#)

[Issue type schemes](#)

[Sub-tasks](#)

WORKFLOWS

[Workflows](#)

[Workflow schemes](#)

SCREENS

Screens

[Screen schemes](#)

[Issue type screen schemes](#)

FIELDS

[Custom fields](#)

[Field configurations](#)

[Field configuration schemes](#)

ISSUE FEATURES

[Time tracking](#)

[Issue linking](#)

Associate field Attachment to screens

Associate the field Attachment 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.

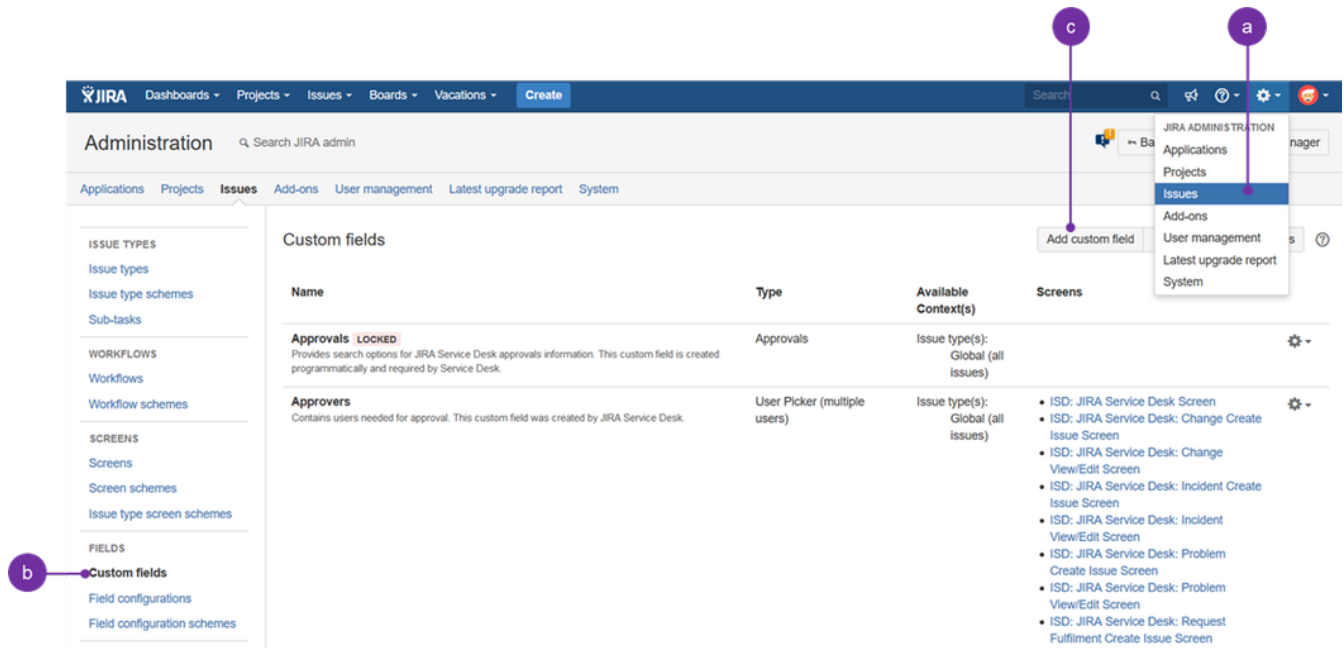
Screen	Tab	Select
Default Screen	Field Tab	<input checked="" type="checkbox"/>
Resolve Issue Screen	Field Tab	<input type="checkbox"/>
VACMAN Comment screen	VACMAN Comment Field Tab	<input type="checkbox"/>
VACMAN Screen Create	VACMAN Create Field Tab	<input checked="" type="checkbox"/>
VACMAN Screen Edit	VACMAN Edit Field Tab	<input checked="" type="checkbox"/>
VACMAN Screen View	VACMAN View Field Tab	<input checked="" type="checkbox"/>
Workflow Screen	Field Tab	<input type="checkbox"/>

f. Click **Update** to save changes

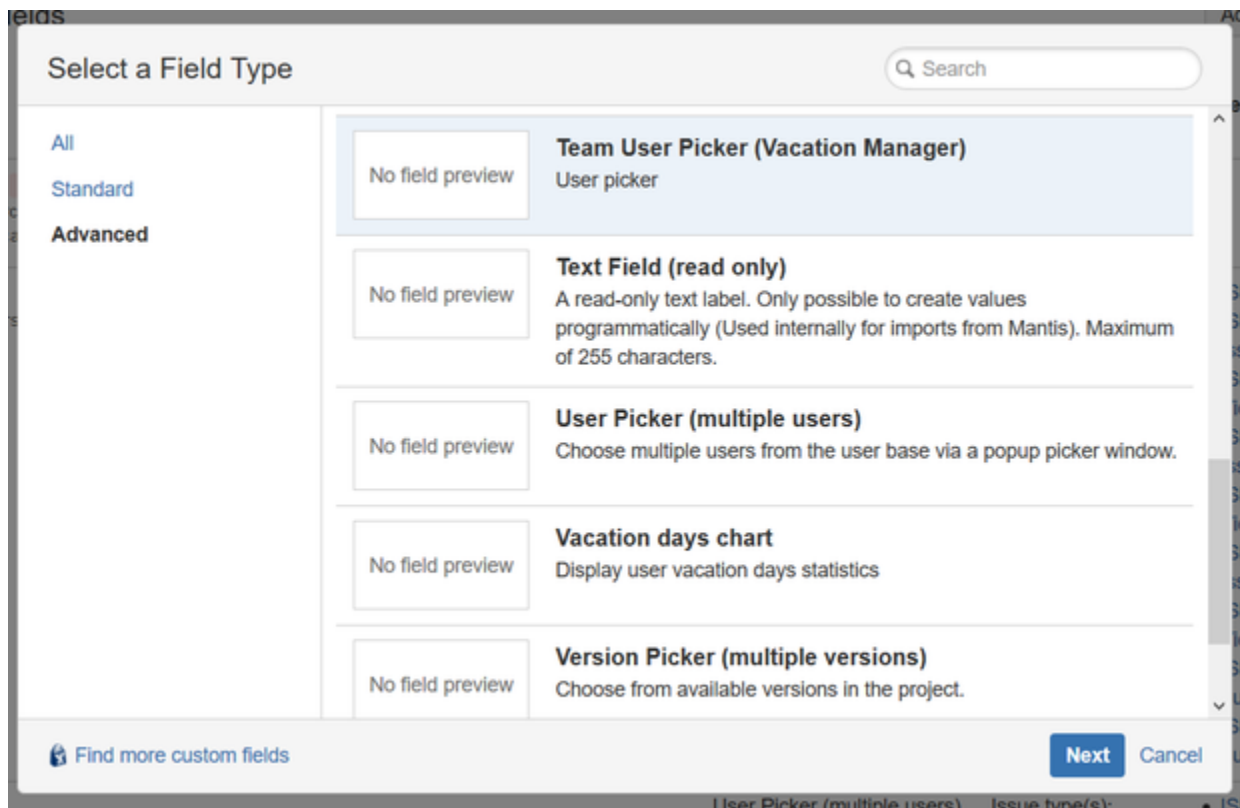
3. **Add new custom field "Supervisor"** of type "*Team User Picker (Vacation Manager)*" to "*VACMAN Field Configuration*".

▼ 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:

Configure 'Team User Picker (Vacation Manager)' Field

Name* Supervisor

Description

Previous Create Cancel

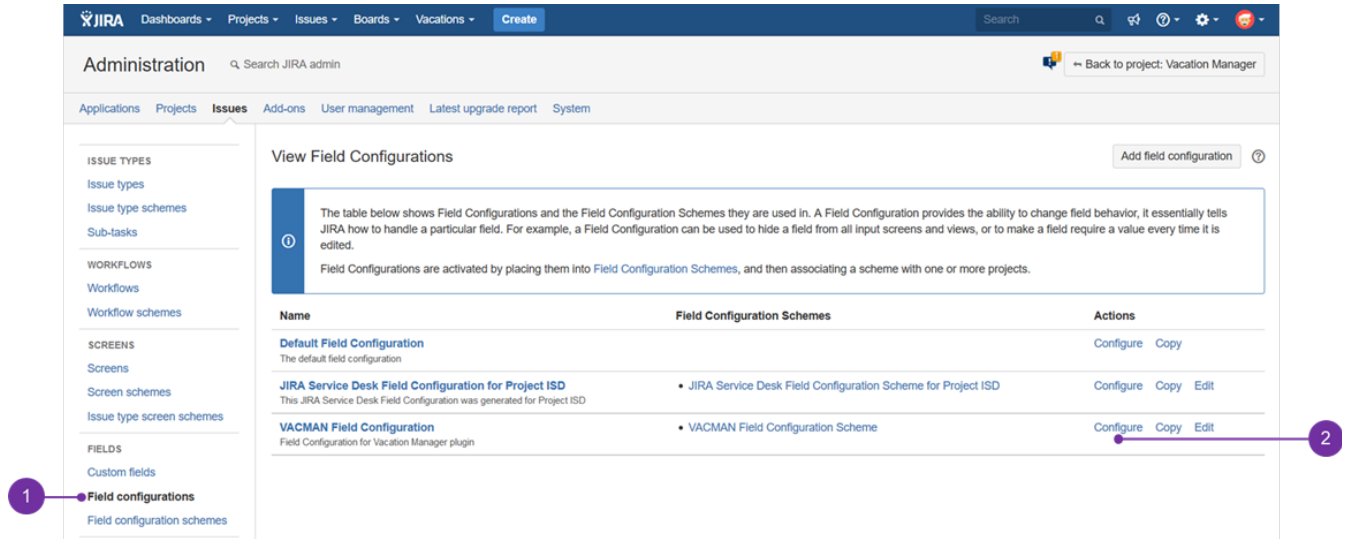
f. On next screen check **Create/Edit/View screens** used by Vacation Manager (by default: **VACMAN Screen Create**, **VACMAN Screen Edit**, **VACMAN Screen View**)

VACMAN Comment screen	VACMAN Comment Field Tab	<input type="checkbox"/>
VACMAN Screen Create	VACMAN Create Field Tab	<input checked="" type="checkbox"/>
VACMAN Screen Edit	VACMAN Edit Field Tab	<input checked="" type="checkbox"/>
VACMAN Screen View	VACMAN View Field Tab	<input checked="" type="checkbox"/>
Workflow Screen	Field Tab	<input type="checkbox"/>
Workflow Screen - 2	Field Tab	<input type="checkbox"/>
Workflow Screen - 3	Field Tab	<input type="checkbox"/>
Workflow Screen - 4	Field Tab	<input type="checkbox"/>
Workflow Screen - 5	Field Tab	<input type="checkbox"/>
Workflow Screen - 6	Field Tab	<input type="checkbox"/>
Workflow Screen - 7	Field Tab	<input type="checkbox"/>

Update Cancel

g. Click **Update** to save changes

h. Navigate back to Field Configurations (1), click Configure (2) (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)



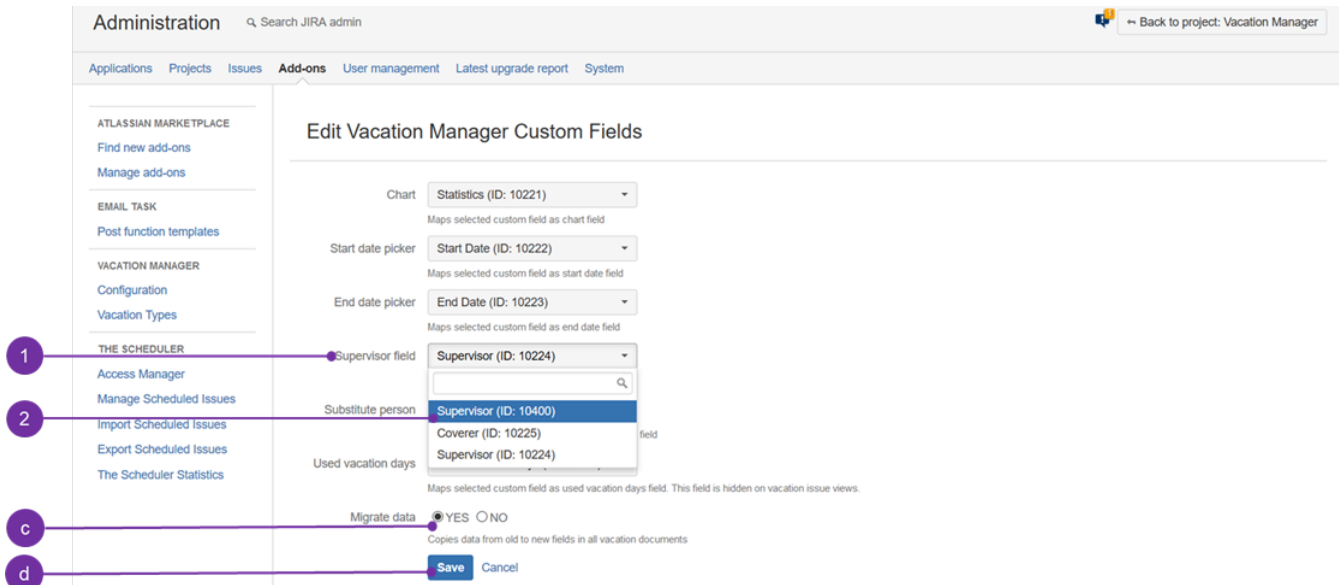
4. Update configuration with created "Supervisor" field.

▼ details

- a. In Vacation Manager configuration (1) click **Edit fields** (2):

The screenshot shows the JIRA Administration interface for the Vacation Manager add-on. The left sidebar contains a navigation menu with categories: ATlassian Marketplace, Email Task, Vacation Manager, and The Scheduler. Under Vacation Manager, the 'Configuration' option is selected and highlighted with a purple circle containing the number '1'. The main content area is titled 'Configure Vacation Manager' and is divided into several sections: 'General', 'Custom Fields', and 'Other'. In the 'General' section, the 'Project' is set to 'Vacation Manager'. The 'Auto-summary' is set to 'YES'. The 'Auto-summary text' field contains a template: '\$(reporter) Vacation Document (\$(vacationType)): \$(vacationDays) days'. Below this, there is a 'Recalculate vacations' section with a dropdown menu set to 'everyday at 0:00' and a 'Recalculate now' button. The 'User vacation warning' is set to 'YES', and the 'Days before user vacation warning' is set to '7'. In the 'Custom Fields' section, there is a list of fields: 'Chart Statistics', 'Start date picker Start Date', 'End date picker End Date', 'Supervisor field Supervisor', 'Substitute person Coverer', and 'Used vacation days Used vacation days'. The 'Supervisor field' is highlighted with a purple circle containing the number '2'. Below the 'Used vacation days' field, there is an 'Edit fields' button. In the 'Other' section, there are 'Migrate descriptions' and 'Delete configuration' options.

b. Select newly created **Supervisor** field (1). Usually newly created Supervisor field has a higher ID number (2):



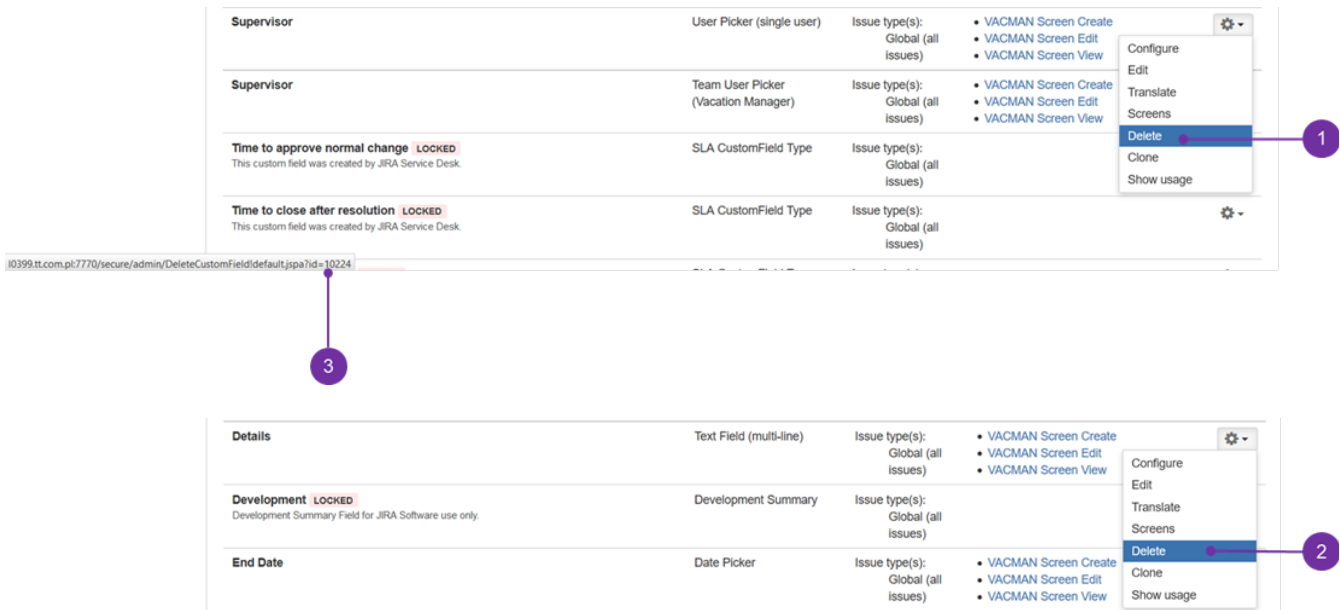
- c. Select **YES** in **Migrate data** option
- d. Click **Save** button to save configuration and move data in Vacation Documents from old to new Supervisor field

5. **Delete or Remove** fields "Details" and "Supervisor".

▼ [details](#)

If you have successfully migrated data you can delete fields Supervisor and Details:

- a. Now you can delete old Supervisor and Details fields (as those are no longer used). Navigate to Custom fields and **delete Supervisor (1) and Details fields (2)**:



i To easily identify the obsolete "Supervisor" field, you may refer to the field's ID (3) displayed when hovering mouse cursor over any option of a field's menu.

- b. Some cosmetics: Navigate to Issues Screens find VACMAN Screen Create and click on configure - to change the order of the fields (by default fields are ordered by ID's), move Supervisor field up to its default place, below Security Level. Exemplary outcome is presented below:

This page shows the way the fields are organised on **VACMAN Screen Create** screen.

Note: when the screen is shown to the user only non-hidden fields that the user has permissions to edit will be actually displayed.

VACMAN Create Field Tab

Field	Type
Issue Type	System field
Summary	System field
Reporter	System field
Security Level	System field
Supervisor	Team User Picker (Vacation Manager)
Supervisor	User Picker (single user)
Coverer	User Picker (single user)
Statistics	Vacation days chart
Start Date	Date Picker
End Date	Date Picker
Details	Text Field (multi-line)
Attachment	System field
Description	System field

Field name Add

c. Do the same actions for View and Edit screens

i If for some reasons you would like to keep fields Supervisor and Details, you can remove them from Vacation Manager screens without deleting those fields:

- Search for **Details** field on **VACMAN Field Configuration** and click on its **Screens** operation
- Uncheck **Create/Edit screens** used by Vacation Manager (by default: **VACMAN Screen Create**, **VACMAN Screen Edit**). You can also uncheck View screen if you made migrations from 1st step.
- Click **Update** to save changes
- Search for **Supervisor** field on **VACMAN Field Configuration** and click on its **Screens** operation
- Uncheck **Create/Edit/View screens** used by Vacation Manager (by default: **VACMAN Screen Create**, **VACMAN Screen Edit**) + view
- Click **Update** to save changes

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

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