Capture
Leave

User Manual

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Table of Contents

Introduction	1
Registering Your Account	2
Logging into the System	3
Settings	5
Organization	5
Groups	8
Manager Level Employees	9
Manager Leave Approval	9
Importing Employees	. 10
Custom Labels	. 11 12
	13
Processing Leave Requests	13
Accessing various Leave Types	14
Accessing Quick Calendar – Days	15
Leave Requests	16
Accessing Leave Requests	16
Filtering Leave Requests	16
Reports	18
Company Leave Report	18
Group Leave Report	22
Employees Leave Report	22
Employees Hours off Report	23
Employee Details	23
Employee Leave Report Download	25
Employee Pending Request Alert	25
View Logs	26
Employees	27
All Employees Listing	27
Add Employee	27
Edit Employee	28
Delete Employee	28
Manual Leave	29
Group Listing	29
Add Group	31
User/Employee Account	31
Account Access Email	31
Employee/User Dashboard	32
Employee/User Leave Request Form	33
Add to Calendar	34
Document Management System (DMS)	36
Document Categories:	. 36
Add Documents	. 36

Messages	37
New Message	
Employee/Dashboard Calendar	
Support	39

Introduction

Welcome to Capture<u>Leave</u>! Capture<u>Leave</u> is a complete, scalable and smart leave management and vacation tracking system. With Capture<u>Leave</u>, you can easily handle all aspects of your leave and absences and also effectively track your organization's vacation planning. Capture<u>Leave</u> is a solid and reliable web-based service with a simple self-service model to suit any business operation.

From our super simple registration, to accessing your account Dashboard, Capture<u>Leave</u> provides a secure and encrypted environment for you to manage all your leave and vacation tracking needs. When you first login, you will be presented with an intuitive interface for setting up your organization specific parameters.

The purpose of this document is to provide you with complete, detailed instructions on setting up and working with your Capture<u>Leave</u> account so that you can make the most of the application's powerful functionality.

Registering Your Account

Access to Capture<u>Leave</u> requires that you register for an account with us by visiting <u>https://captureleave.com/</u> and filling out the **Registration** form, illustrated below, that is located at the [Register Free] or [Create an account] links. Follow the steps below to successfully complete the **Registration** form.

Get started creating your new ac Registration takes less than	ccount – it's free. 2 minutes.
First Name	
	4
Last Name	
	A
Your Email *	
	2
Your Password *	
	a,
Your Organization *	
	đ
By clicking Sign up you agree to the Terms of Servi	ice and Privacy Policy.
I'm not a robot	

On the Registration form page:

6. Click

- 1. Enter your Email Address in the **Your Email** text field. **This is a required entry**.
- Enter a password that you would like to use when accessing the system in the Password text field. This is a required entry.
- Enter your Organization in the Your Organization text field. This is a required entry.
- 4. Enter your First Name in the First Name text field. This is a required entry.
- 5. Enter your Last Name in the Last Name text field. This is a required entry.

Create Your Free Account

to submit your Registration form.

Logging into the System

Upon successful completion of the **Registration** form, you will need to confirm your registration in order to gain access to the Capture<u>Leave</u> system. Check your email for further instructions on how to confirm your account.



Once you confirm your account by clicking on the link provided in your email, you will automatically be logged into Capture<u>Leave</u>.

SIG	IN IN	
Email address *		
	2	
Password *	Forgot Password?	
	a _q	
C Remember me		
	SIGN IN	
Don't have an	account? Sign Up	
/		

Subsequent logins can be done from the home or login page of Capture<u>Leave</u>.

Follow the steps below to successfully log in to CaptureLeave.

Your email addres	SS *
Your password *	
LOG	OIN HERE
	Forgot Password?
	Forgot Password

- Enter the Email Address that you used when completing the Registration form in the Email text field.
- Enter the Password that you chose when completing the **Registration** form in the **Passwor**d text field.
- Click the [Login] button to login to Capture<u>Leave</u>.

When you first log into Capture<u>Leave</u>, you will be taken to your **Settings** tab.

First Namo : Last Namo : Employee Email :	Jenny Albort telania+ika@gmail.com Edit 17		Your current Pricing Plan is Orange 15 - \$25/month Employees: 11 / 15	
Change Pricing Plan Billing Address:				_
Pay by * Crodit Card				Ŧ
Pricing Plan * Orange 15 - \$25/month	-		Billing Cycle • Every Month	Ŧ
Billing Email * don+iko@totaniamail.com				
Addross * 1300 South 4th Street Suite 354	ç V		City * Louisville	Ŷ
State • Kentucky	Ŷ		Zip * 40208	Ŧ
Country * United States	~			
Currently added card is : XXXXX	000000000 Change Card 🕼 Remove Card	4 68	SAVE CANCEL	

From your **Settings** tab, you can edit your **Account**, **Organization**, **Groups** and even **Import** your users (employees) or create **Custom Labels**.

Your Capture<u>Leave</u> account also shows tabs for [**Dashboard**], [**Reports**] and [**Employees**] as well as a dropdown menu for your profile.

Settings

Organization

Selecting **Organization** on the '**Settings'** menu displays the **Organization** screen, illustrated below, where your Organization's details including Name, Default number of Days Off, Date Format, Allow Hourly Requests, Carry Forward Unused Days, Accrual and Accrual Method and Legal Holidays is shown and stored.

Capture<u>Leave</u> User's Manual

ount	Organization	Groups	Import	Custom Labeis	Invoices	
Orgar	hization					
You	r Organization No	me :		Ike, LLC.		
Defe	ault Days Off :			0		
Date	e Format :			mm-dd-yyyy		
Allow	w Hourly Request	s :		Yes		
Car	ry Forward Unuse	d Days :		Yes		
Dail	y Working Hours :			8		
Acc	rual :			Active		
Acc	rual Limit :			0		
Acc	rual Method :			Daily		
Sot Le	əgal Holidays				Edit 🕼	

- 1. Click [Edit] to change the current Name, Default Days Off or Date.
- 2. Most organizations will probably set their Default Days Off to 14 days and US based organizations will set the Date Format to mm-dd-yyyy (month, day, and year) format.

Organization				O Back
Your Organization Name *			Default Days Off *	
Santa		÷	4	<u></u>
Carry Forward Unused Days			Date Format	Allow Hourly Requests
Yes		-	mm-dd-yyyy 🛗	This option cannot be deactivated in the future!
	Accrual		Accrual Method	
			Select	•
				SAVE CANCEL

- The Carry Forward Unused Days, enables the CaptureLeave system to store and accumulate unused vacation days from year to year. Simply select Yes or No to set the right option for your organization.
- 4. Check the box next to [Allow Hourly Requests] if you want your employees to request leaves in hourly and or day or multi-day time formats. Please remember, once activated, this feature cannot be deactivated in the future.
 - If you check the [Allow Hourly Requests] option, you will need to set the default number of daily work hours in your organization. Most

our Organization Name *			Default Days Off *	
Santa		4	4	m
arry Forward Unused Days			Date Format	Allow Hourly Requests
Yes		-	mm-dd-yyyy 🛍	
				* This option cannot be deactivated in the future!
				Daily Working Hours *
				8
	Accrual		Accrual Method	
			Select	-

organizations have eight (8) working hours in a typical work day.

- 5. **New. You can now use Accruals to enable your employees to earn their accrued vacation days. Set the Accrual Method that is suitable for your organization. You can also set user or group level accrual methods. You can choose any of these options Daily, Twice a month, Every two weeks, First of the month, Once a month and Yearly.
- 6. Click [Save] to save your Organization settings.
- Click [Set Legal Holidays] to add your annual list of legal holidays. Next, click [Add Holidays] to save your list of Annual Holidays. You can always go back and change or edit this holidays' list.

	Search Q																r	ž	1	•	Jeni	ny Albert ~
	Annual Holidays																				0	Back
No.	Import		<									2	018								3	>
Jenny Albert	US 2018 Federal Holidays	-																				
	Description			t	0000	mbe	r 20)	8			6	Janu	ary 2	019				Febr	uary	2019	<u>k</u>	
and the second second second	Description		MO	TU	WE	тн	FR	SA	su	мо	TU	WE	TH	FR 1	ia si	мо	TU	WE	TH	18	\$A	su
2 DASHBOARD	US 2018 Federal Holidays							1	2		1	2	3	4	5 0					1	2	3
			3	4	5	6	7	8	9	7	8	9	10	11 1	12 12	4	5	8	7	8	9	10
I LEAVE REQUESTS	12-25-2018		10	18	12	13	14	15	10	14	15	18	24	18 1	19 20	18	12	13	14	15	18	24
	11-22-2018		24		26	27	28	29	30	28	29	30	31			25	26	27	28			
	11-12-2018		31																			
	10-08-2018				Ma	reb 2	010					År	ril 201	á					my 21	nio		
EMPLOYEES	09-03-2018											- AP										
and the second	06-04-2018		NeU I	10	m	in		-	-	-	10	we .	in .			Neu	10	Sec.	- 10	-	an .	50
SETTINGS	05-29-2019		4	5	6	7	8	9	10	8	9	3	9	12 1	13 14	0	7	8	0	10	4 11	12
	05-28-2018		11	12	13	14	15	16	17	15	16	17	18	10 2	20 2	13	14	15	16	17	18	10
- DOOLINITATO	02-19-2018		18	10	20	21	22	23	24	22	23	24	25	26 2	27 21	20	21	22	23	24	25	20
DOCUMENTS	01-15-2018		25	26	27	28	29	30	31	29	30					27	28	29	30	31		
	01-01-2018																					
MESSAGES						ne 20	119					-00	ly 201	a .				ALK	aust.	enc		
All Rights Reserved.	Save Cancel				-	-							-				- 100	-				-
© Copyright 2018 CaptureLeave.com All Rights Reserved.	Save Cancel		мо	τυ	WE	TH	FR	SA	su	мо	τu	WE	тн	FR 1	LA SL	мо	τυ	WE	тн	FR.	SA	\$1,

• Alternatively, you can import the system generated Annual Holidays' list.

8. To get back to your Settings' tab, click the **G** Back button.

Groups

Click the '**Groups**' link to access your listing of Groups within your organization.

Groups enable you to more easily organize your business or organization into sub categories for management purposes.

Acco	unt	Organization	Groups	Import	Custom Labels				
G		DS							
	Add g	roup +							
	#	Name	Employees		Days Off	Accrual	Accrual Method		
	1	Braves	2			Active	Daily	Edit 🕜	Delete ×

Use the steps below to successfully create Groups within CaptureLeave.

- 1. Click [Add group] to enter a name for the new Group. This is a required entry.
- 2. You may enter a set Default Days Off limit for this new group.
- 3. Click [Save] to save this new group.

dd a Gro	oup			G Bac
Group de	tails			
Group Na	me *		Default Days Off	
Senior Mo	anagers	å	21	m
Accrual	Accrual Method	Accrual Limit		
	Twice a month 🛛 💌	21 @	SAVE CANCEL	

 You can continue creating new additional groups or delete/edit an existing group.

# N	Name	Employees	Days Off	Accrual	Accrual Method		
1 B	Braves	2		Active	Daily	Edit 🧭	Delete ×
2 S	Senior Managers	0	21	Active	Twice a month	Edit 🕜	Delete 🗙

Manager Level Employees

If you want to set up Manager level employees who can approve leave requests from their teams, first add the employee you want to "promote" to manager into the specific group you want them to manage.

You can then click on the Make Manager link to upgrade them to a manager that specific group. You can have more than one manager per group.

Employees in Senior Managers O Back								G Back
Add emp	ployees to Senior Me	anagers +			1	Senior Manage	rs Customer Service	Add group
IIA 🗐	Name	Email	Group	Days Off	Method	Group Method	Group Manager	Accrual
. 1	Jack Finn	saleskeymail@gmail.com	Senior Managers	12 days 5.44 hrs	Daily	Daily	Remove	~
2	John Manager	telania+accrualm@gmail.com	Senior Managers	16 days	Daily	Daily	Remove	~
3	Mary Beth	don+olu@telaniamail.com	Senior Managers	14 days		Daily	Make Manager	~
- 4	Peter Gray	don+peter3121@telaniamail.com	Senior Managers	16 days	Yearly	Daily	Make Manager	~
Remove	Remove from group x							

To remove an employee from a manager status in a group, click the Remove link.

Manager Leave Approval

When a member of a group requests leave, the manager(s) of that group will receive an email alert of the pending leave request.

Once logged in, the manager will see a menu item [Leave Requests]. Click on the Leave Request tab to view their pending leave requests from members of the group they manage:

♦ Capture Leave		John Manager ~
	Requests - All	G Back
John Manager	10ay 5 Hours 31 Minutes ago Groove Marley requested 2 Hours	Approved 😣
DASHBOARD	on 12-18-2018 Groove Marley requested 1 Days Off	ays Off : 108.64 Hours left)
LEAVE REQUESTS	Paid Days	
	Action : Information	
REQUEST	Approve Construction of the Approve Ap	
MESSAGES		*
© Copyright 2018 CaptureLeave.com All Rights Reserved.	Toay 5 Hours 37 Minutes ago Groove Marley requested 2 Days Off	Not Granted

Once processed, the system administrators will receive a confirmation email about this processed leave request.

Managers also have access to Reports for the group they manage. They can see daily reports for leave use as well as date range leave requests search. Note that Managers only see leave from members of the group they manage.

Importing Employees

You can easily import your employee list into Capture<u>Leave</u>. Click on the [Import] tab under your Settings area.

Import	
	Impor

NOTE: Make sure your Excel file has the following fields: First Name, Last Name, Email

and Days Off. See an example below.

First Name	Last Name	Email	Days Off
John	Samson	samson@captureleave.com	7
George	Forest	forest@captureleave.com	14
Osborne	Jones	Jones@captureleave.com	

You can import directly into an existing group or import into your main account list.

Click [Import] to complete your import process.

Please note that the import can override your default group days off settings. So even though the New Hires group into which we imported the above list is set to 7 days off, we manually overrode that by setting George Forest's Days Off to 14 days.

Custom Labels

To create your own special leave types, click the [Custom Labels] tab. You can create as many custom leave labels as you like.

Capture<u>Leave</u> User's Manual

Custom Labels				
Community Service	Yes		Edit 🧭	Delete ×
FMLA	Yes		Edit 🧭	Delete ×
РТО	Yes		Edit 🧭	Delete ×
Charity Run	No	-	Edit 🧭	Delete ×
Paternity Leave	No		Edit 🧭	Delete ×
Contractor Time off	Yes	-	Edit 🧭	Delete ×

• Add a Custom Label name i.e. 'FMLA Leave' or 'Unpaid Personal Leave'

lame *			
FLMA Leave			
Paid		Color	
Yes	-	#e91b1b	Ø

- Select Yes/No depending on if you want to make this custom label a paid or unpaid leave type.
- Click on the color box and use the color picker to select a special custom color for your new label.
- Click [Save] to add your new custom label.
- You can always edit an existing label or delete it all together.

The Capture<u>Leave</u> Administrator Dashboard

Clicking on the **Dashboard** link in your Capture<u>Leave</u> account displays the **Dashboard** The **Dashboard** itself displays a quick overview of your account. It displays the **Days Off chart**, **Recent Leaves requests**, **Days Off types legend**, as well as a **4-month Quick Calendar** showing leave requests in a snapshot view. Your Dashboard also displays any **Custom Labels** you have. Simply click on the leave label to get details. You can also click on any colored calendar date to get the leaves off details for that particular day.



Processing Leave Requests



Recent Leave Requests

,	request	ted 2	Hours	5				
on 12-18-2018 Groove Marley	on 12-18-2018 Groove Marley requested 1 Days Off						Pending	
01-16-2019 🕼						109.28 Hours le		
Paid Days:-	1							
Action :	0		Dece	mber	2018		0	
Approve	Su	Мо	Tu	We	Th	Fr	Sa	rce is out on:
	1.1						1	
	2	3	4	5	6	7	8	o view all reques
	9	10	11	12	13	14	15	
	16	17	18	19	20	21	22	
	23	24	25	26	27	28	29	
	30	31						

If you have a Pending Request, you can click on the Pending button to approve or reject the Pending Request. If you need to edit the submitted leave request, click the pencil icon 01-16-2019 and use the calendar to select the new more suitable date. CaptureLeave provides you information on leave utilization for specific dates i.e.

9% of workforce is out on: 01–24–2019. This is to help you make better decisions regarding your pending approvals. You may choose to [**Add a message**] to the approval or rejection action. This message is then emailed to the user in question.

Pending Day Off

You can also click on the

label to see all pending leave requests.

Accessing Various Leave Types

CaptureLeave uses a color-coded system to enable you easily differentiate between different types of leave request. Simply click on the particular type of leave request or details in your Dashboard to get additional information on it.

Paid Day Off
Unpaid Day Off
Legal Day Off
Pending Day Off
Not Granted Day Off
Community Service
FMLA
РТО
Charity Run
Paternity Leave
Contractor Time off

For example, clicking on [FMLA] will display all employees who have requested [FMLA] leave. You can click on the **employee's** name to see additional details about the leave request.

juests - Custom - FMLA	G E
1 Day 20 Hours 58 Minutes ago Adele Sawyerr requested 2 Days Off	Approved 😔
1 Day 21 Hours ago Nika Ta requested 1 Days Off	Approved *
2 Weeks 15 Days 14 Hours ago Peter Gray requested 1 Days Off	Approved *
2 Weeks 15 Days 14 Hours ago Alexis Smart requested 1 Days Off	Approved 😵
🛗 2019 Years 7 Months 6 Days ago Santa Clara requested 1 Days Off	Approved 😵

Accessing Quick Calendar – Days

The 4-month calendar shown on the dashboard enables you to quickly click on a particular day to see who is out and who is in. Firstly, the days off are individually color coded so you have an idea of the type of leave request that was taken.

For example, we clicked on December 28th, we got this detail page:

Company	12-28-2018 :	Employees On Vacation	
	Switch view: 🜖 🛄	Sue Josephine on 12-28-2018	Paid
		Mary Beth on 12-28-2018	Paid
		Jane Peters on 12-28-2018	Paid
		Seth Amble on 12-28-2018	Paid
63.6 %	4 Employee(s) on Vacation	Employees At Work	
		Reid Craft on 12-28-2018	
		Peter Gray on 12-28-2018	
		Julie Birdlove on 12-28-2018	
		John Manager on 12-28-2018	
Now (96%)	6	Jenny Albert on 12-28-2018	and more

Please note that we only display the first 5 employees at work and not the entire list of employees at work.

Leave Requests

Accessing Leave Requests

Click on the LEAVE REQUESTS tab to get access to all your leave requests. This is a comprehensive Leave Requests page which shows all leaves requested, processed, denied. You can use the various filtering and search options to get additional details from this page. For example, you can use filtering dropdown option to get different types of leaves.

Filtering Leave Requests

Requests -	All		
 All Paid Pending Rejected 			
Unpaid 2 Days Jane Peter	4 Hours 5 Minutes ago rs requested 1 Days Off		
• 6 Days Peter Gray	15 Hours 13 Minutes ago requested 2 Days Off		
• 6 Days Julie Birdla	15 Hours 16 Minutes ago ove requested 2 Days Off		

You can also use the useful search box to get leave details from employees in your account:

peter Q	
Search	
Search Result for : peter	
Total record found : 7	
Employee : Jane Peters	
Employee : Peter Gray	
Request : Request from Jane Peters on 2018-04-03 19:42:34 : Paid	
Request : Request from Peter Gray on 2018-03-30 08:34:48 : Paid	

To export your Requested Leaves report, click the Export to XLS button on the bottom right corner of your page:

3 Weeks 24 Days 17 Hours ago Reid Craft requested 1 Days Off	Approved 😣
3 Weeks 24 Days 23 Hours ago Reid Craft requested 2 Days Off	Pending (Days Off : 207 Hours left)
3 Weeks 24 Days 23 Hours ago Reid Craft requested 1 Days Off	Approved 😣
3 Weeks 24 Days 23 Hours ago Reid Craft requested 2 Days Off	Approved 😣
1 2	Export to XLS 🕅

Reports

22.5 %	Switch view: 0 🦼	A HOW 1	QUICK GUID	e ORTS
77.5 %	1048/7 Paid Hours left 304 Paid Hours taken	D051		an 🗢 🙁
tow (46%) Search By Date Range		Employees	Groups	Requests
Start date	End date	Search		
January 2018	February 2018 Mc	rch 2018 Apri	1 2018	May 2018
MO IU WE FH FR SA SU 1 2 3 4 5 6 7 8 0 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 26	MO IO WE IH PK SA SU MO TU WE 1 2 3 4 5 6 7 8 9 10 10 12 13 14 15 10 10 11 12 13 14 10 20 21 22 23 24 25 10 20 21 22 23 24 25 10 20 21 22 23 24 25 10 20 21 22 23 24 25 10 20 21 22 23 24 25 10 20 21 23 24 25 10 20 21 23 24 25 10 20 21 23 24 25 10 20 21 21 21 21 21 21 21 21 21 21 21 21 21 21	Image:	Image: Press and sector SU MO TI 1 1 1 5 6 7 6 12 13 14 15 10 20 21 22 21	U WE IM PK SA SU 1 2 3 4 5 6 9 10 11 12 13 5 16 17 18 19 20 2 23 24 25 26 27

Click on [Reports] to access the Reports area in CaptureLeave.

Reports are divided into three sections:

- 1. Company Leave Report
- 2. Groups Leave Report
- 3. Employees Leave Report

Company Leave Report

The Company Leave Report gives you a quick visual in pie chart, graph and calendar format of how your organization's leaves of absence or vacation tracking is shaping out.



Click on the chart icon to see your Company Leave Report in the chart format

To see the details on Paid Days Off or Paid Hours Off actually taken or left, mouse over





The CaptureLeave Reports also includes a quick leave summary report. You can see how many employees are in your account or even the total number of leave requests approved.

To search for leave requests based on a time frame, use the search option.

Search By Date Range			
06-25-2018		06-29-2018	Search

Select a starting and ending date and click the [Search] box to get the details of which employees are out for that date period.



Your Company Leave Report also includes a day-by-day calendar section which shows which days have been taken.

color-coded day monitor. Clicking on any colored day gives you the details of who is at work versus who is absent for that particular day.

Company	03-08-2018 :	Employees on vacation
	Switch view: 🌒 📶	Loa low on 03-08-2018 Unpaid Adele Sawyerr on 03-08-2018 Paid
20.0 % 8 Em 2 Employ	iployee(s) at Work yee(s) on Vacation	Employees at work
80.0 %		Nika Ta on 03-08-2018 Anna Wakolski on 03-08-2018
		Alexis Smart on 03-08-2018 Peter Gray on 03-08-2018 Santa Clara on 03-08-2018
Now (16%)		

This is helpful in alerting you to potential overscheduling.

Group Leave Report

To get Group level report, click on the [Groups] tab in the Reports area.

Company	Groups	Employees			Year:	2018 👻
Grou	os	N	ow (16%)			
# N	ame		Employees	Hours Approved / Total		
1 B	raves		2	48 / 112		43%
2 S	enior Managers		1	0 / 168		0%

The Groups report show how users in your groups are taking their vacation days. From the example above your Braves are spending more time outside the office than your Senior Managers.

Employees Leave Report

The Employees' Leave Report is available in the [Employees] tab of the Reports section.

This report gives you an employee listing showing how many days off the employee has requested and approved versus total outstanding vacation days.

Employees Hours off Report

mpany Groups Emp	bloyees	Ye	ear: 2018
Employees	Now (16%)		
		All Braves Senior M	lanagers
# Name		Hours Approved / Total	
1 Santa Clara		16 / 32	50%
2 Adele Sawyerr		24 / 112	21%
3 Peter Gray		16 / 48	33%
4 Loa low		24 / 96	25%
5 Alexis Smart		16 / 32	50%
6 Anna Wakolski		32 / 80	40%
7 Mary Kavay		0/0 C	0%
8 Nika Ta		8 / 0	0%
9 Zero Days off		0/0	

Employee Details

You can click on an employee's name to get a detail employee leave report.

				G Back
Accrual :	Active	First Name :	Alexis	
Accrual Method :	Daily	Last Name :	Smart	
Accrual Limit :	14	Employee Email :	telania+santal@gm	nail.com
Leaves Taken :	2	Group	Braves	
Earned Leaves :	2 days	Date Created	02-14-2018	
Days Off left :	2 days 0 hours	Accrual :	Activo	
	Adjus	Accrual Method :	Daily	
0		Accrual Limit :	14	
ays off Paid Day Off		20	18	
ays off Paid Day Off Unpaid Day Off	<	20	18	>
Paid Day Off Unpaid Day Off	Murch 2	20 018 April 2018	18 Mary 2018	June 2018
Paid Day Off Unpaid Day Off Legal Day Off Selected Day	Morch 2 Morch 12 Morch 12	018 April 2018 78 SA 50 MO TU WE TH FR SA 50	18 Mory 2018	June 2018 Mo TU WE TH FE SA 50
Paid Day Off Unpaid Day Off Legal Day Off Selected Day Community Service	Morch 2 Mo TJ W TR 1 5 6 7 7 8	018 April 2018 78 54 50 Mo TU WE TH FR 54 50 9 00 11 2 3 4 5 6 7 8	12 1 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2	June 2018 Mo TO WK TH FK 5A 50 1 3 2 3 4 5 0 7 8 0 7 8 0 10
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Accrual :	Active				First	Name :	:			Anno	a .								
Accrual Method :	First of the month				Last	Name				Wak	olski								
Accrual Limit :	14				Emp	oloyee E	mail :			telar	nia+s	anto	2@gn	naila	om				
eaves Taken :	4				Gro	up				Brav	os								
arned Leaves :	6 days				Date	e Create	ed			02-14	4-20	8							
ays Off left :	6 days 0 hours				Acc	rual :				Activ	10								
			Activet		Acc	rual Me	thod :			First	of th	e ma	inth						
			Majasi		Acc	rual Lim	nit :			14									
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In the employee details screen, you can edit/delete existing approved vacation days. Examples of this can be if the employee chooses not to take their requested vacation or something changes, and you need them back in the office.

You can also adjust or edit an employee's default allotted Days Off. For example, if Anna has earned or accrued some additional vacation days, you can click on [**Adjust**] to add the additional vacation days.

Days Off adjustment			
5			
Hours adjustment			
15			
Hours			
Reason			
Earned additional time off			
		10	
	SAVE	CANCEL	

So, we have given Anna Wakolski an extra 5 days of vacation for meeting her sales goals showing his Days Off left information).

Employee Leave Report Download

Download your Employee Leave report by clicking on the [Export to XLS] button at the end of the Employee Leave Report page

You can save or open the report.

Here's a sample of how the report looks like:

Individual Employee Report

Paid Day Off			<	2								20	8										>	Þ
				Mo	irch 201	8			Ap	ril 201	8			Mo	ay 20	18		L		Ju	ne 2	018		
			MO	TU WE	TH FR	SA 3	su 4	мо	TU WE	TH R	H SA	50	MO TI	2 WE	TH 3	FR 1	SA SU	M	о ти	WE	TH	1	8A 1	3
Community Service			5	8 7		10	11	2	3 4		0 7	8	7 8	0	10	11	12 13	4	5	0	7	8	0	10
FMLA		000	Opening	Adele	Sawyo	err re	port	: 03	-01-20)18.x	ls			23	24	25	26 27	10	10	20	21	22	23 :	24
		You have	chosen	to ope	in:									30				24	5 20	27	28	20	30	
Observation Bases		🐕 Adele S	awyerr r	eport	03-01	1-20	18.x	ds							_					_			_	4
Chanty Run		which is	: Docum	ent										opto	mbe	r 20)	18			Octo	sbar	2018		
Paternity Leave		from: n	ttps://ca	pture	leaved	ev.c	om										1 2	1	2	3	4	6	6	7
Contractor Time off		What sho	uld Firef	ox do	with th	is file	e?							5	0	7	8 9	8	9	10	11	12	12	34
		Oper	with M	licroso	oft Exce	el (de	efaul	lt)				0	1	10	20	21 :	22 23	23	2 23	24	25	20	27 :	28
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Days Off approved :														WE	TH	78	EA SU	м	о ти	WE	TH	11	SA I	su
Date	Action							C	ancel	1.0		эк	-	2	3	4	5 6	1.				1	2	3
03-08-2018 - Paid	Del													16	17	10	19 20	n	12	13	14	15	10	17
(Community Service)			10	20 21 27 28	22 23 29 30	24	25	17 24	18 19 25 26	20 1 37 2	1 22 15 29	23 30	21 2 20 21	23	24 31	26 :	26 27	10	1 19 5 20	20 27	21 28	22	23 :	24
04-11-2018 - Poid (FMLA)	Delet	• *						31																
04-12-2018 - Paid (FMLA)	Delet	0 ×																		B	kpor	t to)	KLS [ZD.
Showing 1 to 3 of 3 entries																								
Provinces 1 Name																								
		View logs																						

Complete Organization Report

	А	В	С	D	E	F	G	н	I	J	к	L	М	N
1	Name	Email	ours Approve	Total	Balance	Paid	Unpaid	nmunity Serv	FMLA	PTO	Charity Run	aternity Leav	ntractor Time	off
2	Adele Sawyerr	don+sam1@t	0	112	112	24	0	8	16	0	0	0	0	
3	Alexis Smart	telania+santa	0	32	32	16	0	8	8	0	0	0	0	
4	Anna Wakolski	telania+santa	0	80	80	32	0	0	0	0	0	0	0	
5	Another Zero	don+ero@tela	0	168	168	0	0	0	0	0	0	0	0	
6	Loa low	don+lod2@te	0	96	96	24	8	0	0	0	0	0	0	
7	Mary Kavay	mary@eleapu	0	0	0	0	0	0	0	0	0	0	0	
8	Nika Ta	don+nik@tela	0	0	0	8	0	0	8	0	0	0	0	
9	Peter Gray	don+peter2@	0	48	48	16	0	0	8	0	0	0	0	
10	Santa Clara	telania+santa	0	32	32	16	0	0	8	0	0	0	0	
11	Zero Days off	don+zero@te	0	0	0	0	0	0	0	0	0	0	0	
12														
13														
14														
15														
16														
17														
18														
19														
20														

Employee Pending Request Alert

When you have a new employee leave request pending, Capture<u>Leave</u>, will alert you by posting a small red number indicator next to the [**Dashboard**] link in the top menu area.

Click on the [Dashboard] link to see the pending leave request and take action.



View Logs

To see a history or logs of employee leave requests, click on the employee's name from the Reports area and then click on [**View logs**].

The view logs will show a history of requests submitted and responses or actions taken: approved, denied or not granted.

Click [Hide logs] to close the [View logs] screen.

You can also click [**Export to XLS**] to download an individual employee leave request report showing: Name, Email, Days Off Requested, Days

Date	Action
02-14-2018 - Paid (Community Service)	Delete 🗙
03-28-2018 - Paid (FMLA)	Delete 🗙
howing 1 to 2 of 2 entries	
Previous 1 Next	
	Hide
- 8 '03-28-2018' added on 0 Santa Clara	02-14-2018 by
- 8 Alexis Smart requested 02-14-2018 Approved	8 Hours on

Off Approved and Total Default Vacation Days allotted.

A	В	С	D	E	
Name	Email	Days Off Requested	Days Off Approved	Total	
Lazarus Atudiko	diri@telaniamail.com	13	4	7	

Employees

Click the [**Employees**] tab on the top menu to show a listing of all your organization's employees. The employees' area enables you to easily manage all aspects of your organization's users or employees.

All Employees Listing

The listing of employees is comprehensive showing employee name, email, group, and days off allotted. You can click on the [<u>Employee's Name</u>] to display more details on that particular employee including options to edit and adjust the employee's Days Off allotment.

Add Employee

To add an employee, simply click the Add employee + button. You can then enter the employee First Name, Last Name, Employee Email, Group (if needed) and Annual Paid Days Off (if needed), Accrual, Daily Working Hours, Accrual Method, and Accrual Limit. If you don't add an [Annual Paid Days Off] number, the default number of Paid Days Off will automatically be assigned to the new user or employee. Click [Add] to add the new user or employee.

dd an Employee		O Bac
Employee details		
First Name *		Last Name *
Samuel	۵	Saul
Employee Email *		Group
samsaul@captureleave.com	M	Senior Managers 💌
Annual Paid Days Off	Accrual	Daily Working Hours
12 Days * Default number of Paid Days Off	is 4	8
		Hours * Default number of Daily Working Hours is 8
Accrual Method	Accrual Limit *	SAVE CANCEL
First of the month	12 👘	

Edit Employee

To edit an existing employee, click the Edit S button. You can then edit all existing information related to this employee including First Name, Last Name, Employee Email, Annual Paid Days Off and Group. Click [Save] to save and exit this screen.

Delete Employee

To delete an existing employee, click the Delete × button. You will be required to confirm deletion by clicking Delete or Don't .
Delete employee
Are you sure you want to delete Alexis Smart
Delete Don't

Please NOTE: Delete is final. If an employee is deleted all their leave and vacation tracking activity is deleted from the system and CAN'T be retrieved.

Manual Leave

If you need to manually add leave to individual employees or if an Admin needs to add request or add leave to their account, simply click on the Employee's name from the [Employees] tab.

				1	1	2 3	3 4				0			1		1	2	3	4	5	6					1	2	3
and the second		5	6	7 8	3 1	9 1	0 11	2	3	K	5	6	7	8	7	8	9	10	Π	12	13	4	5	6	7	8	9	10
Community Service	1	2 1	13 1	4 1	5 1	6 T	7 18	9	10	n	12	13	14	15	14	15	16	17	18	19	20	n	12	13	14	15	16	17
ENILA.	1	9 2	20 3	21 2	2 2	3 2	4 25	16	17	18	19	20	21	22	21	22	23	24	25	26	27	18	19	20	21	22	23	24
PMILA	3	6 3	27 2	8 2	9 3	0 3	n	23	24	25	26	27	28	29	28	29	30	31				25	26	27	28	29	30	
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Paternity Leave		10	TU N	VE T	ни	R S	A SU	мо	TU	WE	TH	FR	SA	SU	мо	TU	WE	TH	FR	SA	SU	мо	τυ	WE	TH	FR	SA	su
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	1.1		Nov	em	ber	2018	3		D	ece	mbi	er 20	018			10	anı	Jany	201	9			F	ebn	Jan	201	9	
		10 1	TU V	VET	HF	R S	A SU	мо	ти	WE	TH	FR	SA	SU	MO	τυ	WE	тн	FR	SA	SU	MO	TU	WE	TH	FR	SA	SU
															-													
Request type *			8	7 9		2 3	0 11	2		5		7	9	2	7	0	2	10	11	12	12		6	6	7	1	2	10
		2 1	13 1	4 1	5 1	6 T	7 18	10	11	12	13	14	15	16	14	15	16	17	18	19	20	n	12	13	14	15	16	17
Paid 🛛 🐨		9 3	20	71 2	2 2	3 2	4 25	17	18	19	20	21	22	23	21	22	23	24	25	26	27	18	19	20	21	22	23	24
		6 :	27 3	8 2	9 3	0		24	25	26	27	28	29	30	28	29	30	31				25	26	27	28			
Purpose								31																				
- Choose -																							5					
04-10-2018																								Ð	por	t to	XLS	R
04-10-2018																												
🛛 Full Day																												
Hours																												
ADD TIME OFF																												

- 1. Select the date for the leave request.
- 2. Then select the type of leave Paid or Unpaid
- 3. Next select if this is a full day leave or hourly leave. If hourly, add the number of hours off requested
- 4. Click ADD TIME OFF button to manually add the time off request.

Group Listing

The Employees' area also lists your Groups. For example, we have 3rd Shift, Senior Managers as two groups in our sample account.

Ac	id employee +	Name/Email	٩				All 3rd Shift	Senior Ma	nagers A	Add group 🕇
#	Name	Email		Group	Days Off	Active	Accrual Method	Accrual		
1	Adele Sawyerr	don+sam1@telaniamail.com			14 days	Yes	Daily	Active	Edit 🕜	Delete ×
2	Alexis Smart	telania+santa1@gmail.com		3rd Shift	4 days	Yes	Daily	Active	Edit 🕼	Delete ×
3	Anna Wakolski	telania+santa2@gmail.com		3rd Shift	10 days	Yes	First of the month	Active	Edit 🕜	Delete ×
4	Another Zero	don+ero@telaniamail.com		Senior Managers	21 days	Yes	Daily	Active	Edit 🕜	Delete ×
5	Loa low	don+lod2@telaniamail.com			12 days	Yes	Every 2 weeks	Active	Edit 🕜	Delete ×
6	Mary Kavay	mary@eleapuser.com				Yes	Daily	Active	Edit 🕜	Delete ×

Click on the Group to show a listing of all employees in that Group.

Employe	ees in 3rd Shift					G Back
Add emp	loyees to 3rd Shift +				All 3rd Shift Senior Ma	inagers Add group
	Name	Email	Group	Days Off	Accrual Method	Accrual
□ 1	Alexis Smart	telania+santa1@gmail.com	3rd Shift	4 days	Daily	Active
□ 2	Anna Wakolski	telania+santa2@gmail.com	3rd Shift	10 days	First of the month	Active
Remove f	irom group ×					

You can click on an employee's name and then click [Remove from group] to remove that employee from the current group they belong to. You can also edit an employee's profile to remove them from groups.

Click All to go back to your complete employee listing.

Add Group

To add a new Group, click the Add group button. Add the Group Name and Default Days Off (if needed), Accrual, Accrual Method and Accrual Limit.

Add a Gro	pup					G Back
Group det	ails					
Group Nan Add group	ne * 9 name here				Default Days Off	m
Accrual	Accrual Method Yearly	•	Accrual Limit	æ	SAVE CANCEL	

User/Employee Account

The Employee or user dashboard is simple and elegant. When an employee is first added to an account, they will receive an email containing their account information.

Account Access Email

See an example of the account password email:



Once the user clicks on the <u>https://captureleave.com</u> link, they are able to login using the email address and password shown in their account email message.

SIGN IN	
Email address *	
don+zero@telaniamail.com	
Password *	Forgot Password?
	٩,
Remember me	
	SIGN IN
Don't have an account? Sig	yn Up

Employee/User Dashboard

When an employee or user first logs, in, they have a clean and crisp user dashboard to work with.

♦CaptureLeave				Zero Days off ~
	Dashboard Accurals		Requested time off	
Zero Days off	Accrual :	Active	2 Hours 14 Minutes ago You requested 1 Days Off	Approved
	Accrual Method :	Doily		
🚳 DASHBOARD	Accrual Limit :	14		
	Days Off left :	-1 days		
	0 1 (0%)	0		Click here to make a new request
	Paid Day Off	<	2018	>
© Copyright 2018 Capturel eave.com	Unpaid Day Off			
All Rights Reserved.	Legal Day Off	M	larch 2018	April 2018

The user can begin to request leave or time off by simply click the

Click here to make a new request text link or the tab to get started.

Employee/User Leave Request Form

When the user clicks the request the day or days they wish to request leave for. The employee clicks on the requested leave days in the calendar on their right side. Once the day or days are selected, the employee can select the type of leave request: Paid or Unpaid.

Employees can use the [Purpose] option to select the kind of custom leave you have set. Employees can also request leave in hourly chunks. If they uncheck the [Full Day] option, they can add the number of hours they wish to be off for. They can also add a reason for the leave so that account administrators have a better understanding of the reason for the leave request.

Request Form	
Days Off left : 12 days 1.28 hours	Paid Day Off Unpaid Day Off
Request type *	Legal Day Off Pending Day Off
Paid 💌	Selected Day Off
Purpose	
- Choose -	November 2018 December 2018 January 2019
Reason	MO TU WE TH FR SA SU MO TU WE TH FR SA SU MO TU WE TH FR SA SU
	Image: Normal bar with the state of the state o
01-24-2019 Delete ×	
01-23-2019 Delete ×	Information
01-31-2019 Delete ×	9% of workforce is out on: 01-24-2019 0% of workforce is out on: 01-23-2019
SEND REQUEST	27% of workforce is out on: 01-31-2019

Employees are encouraged to review the [Information] section to gage the likelihood their leave request being processed. The more users are out, the less likely your leave request is to be approved.

The employee can then submit the request by clicking **SEND REQUEST**. An email is automatically sent to the account Administrator to process this new request and a confirmation or response will be sent to the user's email address on file.

we Off loft : -1 dave																												
lys officit. Tudys	Po	aic	Day	0	ff											npo		Da	y Of									
u selected 2 days :	Le	ego	al Do	iy C	Off										Р	enc	ding	g Do	ay C	off								
1-18-2018 01-19-2018	Se		ctec		ay C	off																						
NEW REQUEST																												
		e																									2	5
		`																									1	"
			Janı	Jan	y 20	18			Fe	bri	Jan	/ 20	018				Mar	ch	2018					Apri	il 20	D18		
	мо	π	WE	TH	FR	SA	SU	мо	τu	WE	TH	FR	SA	SU	мо	τυ	WE	тн	FR	SA	SU	мо	τu	WE	тн	FR	SA :	su
	1	2	3	4	5	6	7				1	2	3	4				1	2	3	4						T	1
	8	9	10	11	12	13	14	5	6	7	8	9	10	Π	5	6	7	8	9	10	Π	2	3	4	5	6	7	8
		10	17	18	19	20	21	12	13	14	15	16	17	18	12	13	14	15	16	17	18	9	10	11	12	13	14	15
	15	IC																										

Once your request is processed (approved or rejected), you will receive an email alert about the result and you can sign into your account to see the details.

me 🕶	ogeopticeave.com <u>titi</u> revers / com	
Jan 10 Thu	Your Leave Request When Thu Jan 10, 2019 8am (UTC) Where https://captureleave.com Add to calendar »	Agenda Thu Jan 10, 2019 No earlier events 8am Your Leave Request No later events
	Hi Groove,	
	Your leave request for 1 Days Off has been appro You requested time off for the following dates : 01-10-2019	ved.

Add to Calendar

How to add your approved leave to your calendar:

- Gmail (Google) click the [Add to calendar] option or click the highlighted approved leave dates to them to your calendar.
- iCal/Outlook Download the .ics file to import into your calendar

Alternatively, you can use the attached file to import your time off to your Outlook or iCal calendars.	-
For details log into your account at : https://captureleave.com/	
Sincerely, Team Capture <u>Leave</u>	
Contact us Phone: (502) 653-8579 Address: 1300 South Fourth Street, Suite 350, Louisville, KY 40208, USA If you have received this email in error, please forward it immediately to <u>support@captureleave.com</u> . Sent: 12-18-2018	
CaptureLeave_Event.ics Download	>

Once the employee logs into their account, they can click on the Approved button to see more details of their approved vacation request including any messages the administrator might have attached to the approval.

You requested 2 Days Off on 09-23-2012 "Enjoy the wedding!"	Approved
09-25-2012 10-19-2012	
Slide Up	

Of course, if the request is not granted, the employee/user can click on the **Not Granted** button to see the details on why this request was not approved.

The employee/user can click Slide Up to close this screen.

Document Management System (DMS)

The Document Management System in CaptureLeave enables Admins and other HR representatives to upload company policies and share them with their staff. This tool is comprehensive and allows multiple permission levels to be set.

Document Categories:

Document categories help you organize and manage your many documents in

CaptureLeave. Simple go to the Document Categories tab to create or edit document categories.

Add Documents

To add new documents, click the Add Document tab.

ocuments	Add Document	Document Categories					
Add Doc	ument						
Name :							
Leaves of	absence policy						
Category :							
Leave Poli	cies		¢				
Attach files Choose File	: 1544012427Break	Periods_PolicySample.doc					
Access :							
All			\$				
Status :							
Active			\$				
Save	Cancel						

You can then add a name for the document, select the appropriate category, upload the file, define the access and activate or deactivate the new document you have added.

Access Rules:

• Just me – this is a document for your eyes only

- All this document is accessible by every user in your organization regardless of access level.
- All users all employee level users have access to this document
- All managers all managers have access to this document
- All administrators only administrators will be able to access this document
- Individuals this document is only available to the selected individuals.

Access:	
Individuals	\$
Select Individuals :	
Jenny Albert (Ike, LLC.) X Julie Birdlove (Ike, LLC.) X Peter Gray (Ike, LLC.) X	

Messages

The Messages system is a simple but effective way for your employees to get in touch with you Admins. When a new message is sent, you will be notified via email.

•	CaptureLeave via level37.com to Peter 👻	n 11:26 PM (0 mi	nutes ago)	\overleftrightarrow	*	:	Ľ	0
		Hi Admin Peter,					L	0
		You have a new message from Groove Marley.					L	+
		Here's the message:					L	
		Subject: Are we off New Year's day?					L	
		Message at: 12-19-2018 23:26:31					L	
		Message: Is this a paid holiday?					L	
		Reply to message					1	
		Thanks, The CaptureLeave Team Remember, you can access your account any time at <u>https://captureleave.com</u> .						

You can reply to the message by going to your Messages area and using the reply button.

My Messages

,				
Date/Time	From	Message	Unread Replies	View Detail
12-19-2018 23:26:31	Groove Marley	Is this a paid holiday?	0	View & Reply
From : Groove Marley Subject : Are we off Nev Message at : 12-19-2018 Message: Is this a paid	v Year's day? 23:26:31 holiday?			
Reply				
Attach files : Choose Files No file (chosen			
Reply				

New Message

If you have new messages, your new message icon will update with the new message count. Click the icon to see and respond to your new messages.



Please note that the first Admin to reply to a message establishes a message thread with the employee and continues to be notified of new replies to the thread.

Employee/Dashboard Calendar

Employees/users can access their leave calendar via their dashboard. The dashboard shows Paid Day Off, Unpaid Day Off, Legal Day Off, Pending Day Off, Not Granted Day Off via the employee calendar.

♦CaptureLeave				Soth Amble -
	Dashboard Accurals		Requested time off	
Seth Amble	Accrual : Accrual Method :	Active Daily	1 Weeks 10 Days 2 Hours ago You requested 1 Days Off	Rejected
🚳 DASHBOARD	Accrual Limit :	14	1 Weeks 10 Days 2 Hours ago You requested 3 Days Off	Approved
REQUEST	Days Off left :	13 days	Approved	
	0	21	3 Weeks 25 Days 1 Hour ago You requested 1 Days Off	Approved
	8 (38%)		3 Weeks 25 Days 1 Hour ago You requested 1 Days Off	Approved
			Click he	re to make a new request
	Paid Day Off	<	2018	>
	Unpaid Day Off			
	Logal Day Off	January 2018	February 2018 March 2018	April 2018
© Copyright 2018 CaptureLeave.com All Rights Reserved.	Pending Day Off	MO TU WE TH FR SA SU	MO TU WE TH FR SA SU MO TU WE TH FR SA SU	NO TU WE TH FR SA SU
	Not Granted Day Off	8 9 10 11 12 13 14	5 6 7 8 9 10 11 5 6 7 8 9 10 11	2 3 4 5 6 7 8

Support

Capture<u>Leave</u> Support is available 24 hours per day, 7 days a week. Getting started or managing your Capture<u>Leave</u> account is easy. The Capture<u>Leave</u> Online Library 'How to do everything' videos and manuals/ user guides with step-by-step instructions, will help you manage all aspects of your Capture<u>Leave</u> System account.

Contact Capture<u>Leave</u> 24/7 via

Phone : (502) 638-2399 Fax : (502) 585 2345 Email : <u>support@captureleave.com</u>