

CaptureLeave

User Manual

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Introduction

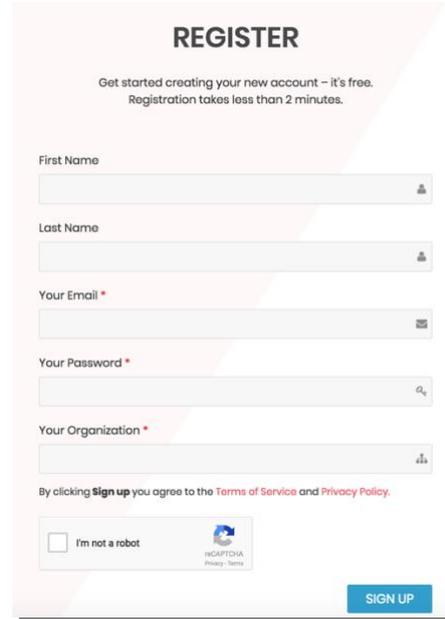
Welcome to CaptureLeave! CaptureLeave is a complete, scalable and smart leave management and vacation tracking system. With CaptureLeave , you can easily handle all aspects of your leave and absences and also effectively track your organization's vacation planning. CaptureLeave is a solid and reliable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

From our super simple registration, to accessing your account Dashboard, CaptureLeave 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 CaptureLeave account so that you can make the most of the application's powerful functionality.

Registering Your Account

Access to CaptureLeave requires that you register for an account with us by visiting <https://captureleave.com/> 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.



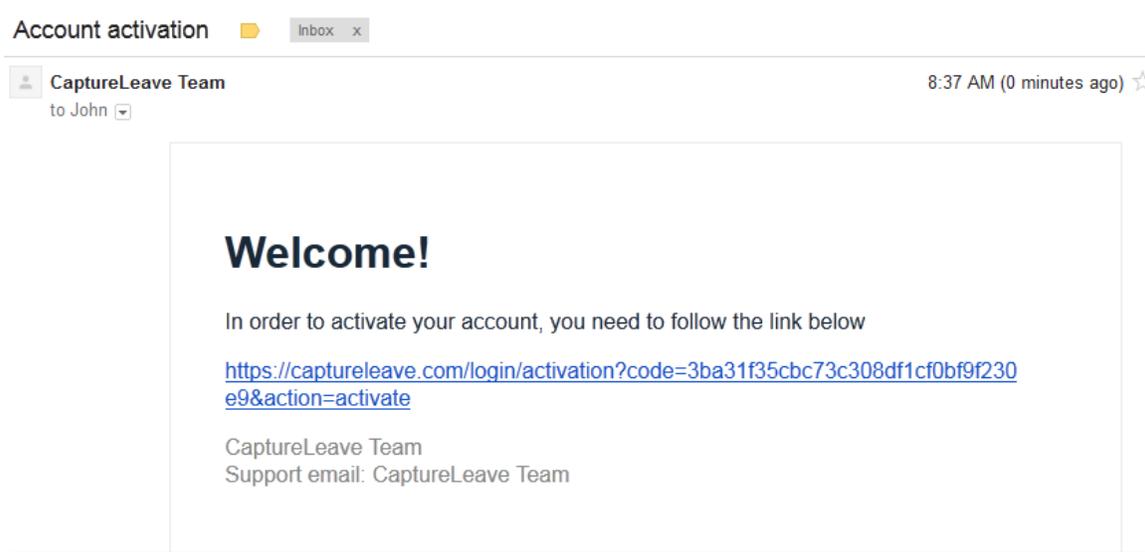
The screenshot shows a registration form titled "REGISTER". Below the title, it says "Get started creating your new account – It's free. Registration takes less than 2 minutes." The form contains five text input fields: "First Name", "Last Name", "Your Email *", "Your Password *", and "Your Organization *". Each field has a small icon on the right side. Below the "Your Organization *" field, there is a line of text: "By clicking **Sign up** you agree to the [Terms of Service](#) and [Privacy Policy](#)." At the bottom left, there is a checkbox labeled "I'm not a robot" next to a CAPTCHA logo. At the bottom right, there is a blue button labeled "SIGN UP".

On the Registration form page:

1. Enter your Email Address in the **Your Email** text field. **This is a required entry.**
2. Enter a password that you would like to use when accessing the system in the **Password** text field. **This is a required entry.**
3. 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.**
6. Click  to submit your Registration form.

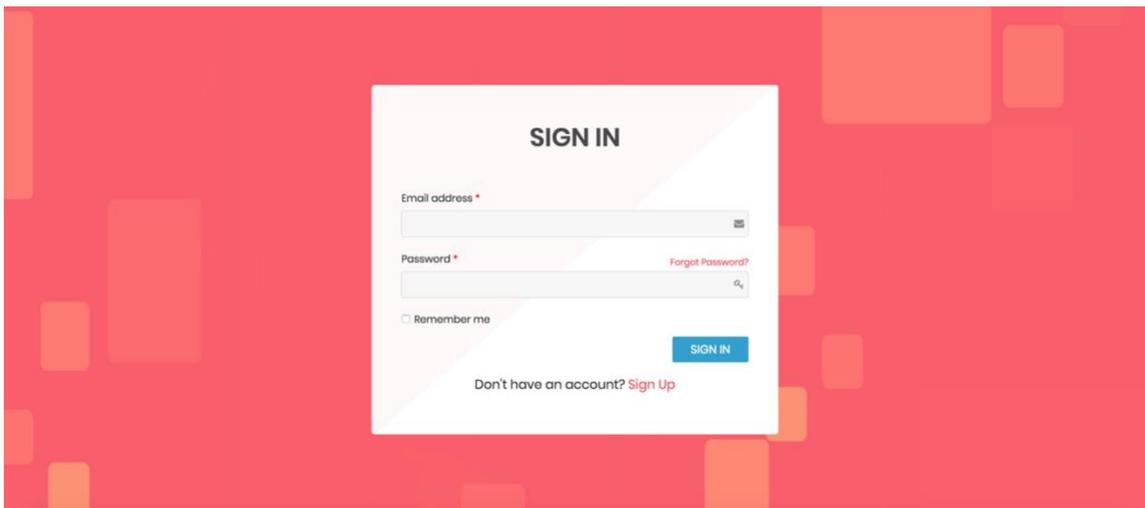
Logging into the System

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

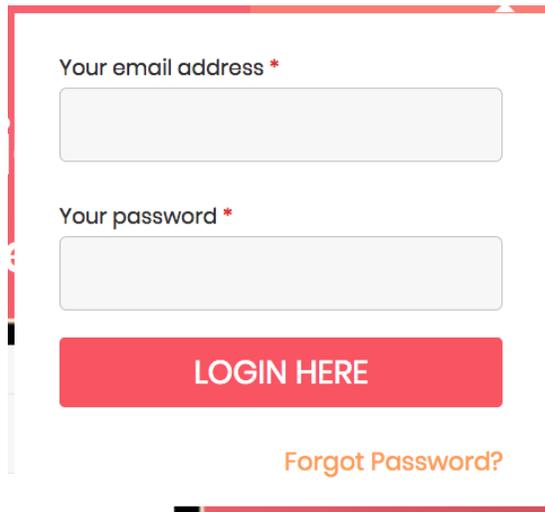


Once you confirm your account by clicking on the link provided in your email, you will automatically be logged into CaptureLeave.

Subsequent logins can be done from the home or login page of CaptureLeave.



Follow the steps below to successfully log in to CaptureLeave.



Your email address *

Your password *

LOGIN HERE

[Forgot Password?](#)

1. Enter the Email Address that you used when completing the **Registration** form in the **Email** text field.
2. Enter the Password that you chose when completing the **Registration** form in the **Password** text field.
3. Click the [Login] button to login to CaptureLeave.

When you first log into CaptureLeave, you will be taken to your **Settings** tab.

The screenshot displays the 'Change Pricing Plan' interface. At the top left, there is a summary box with the following information: First Name: Jenny, Last Name: Albert, Employee Email: telania+ike@gmail.com, and an 'Edit' button. To the right, a message states: 'Your current Pricing Plan is Orange 15 - \$25/month Employees: 11 / 15'. Below this is the 'Change Pricing Plan' section, which includes a 'Billing Address' header. The form contains several fields: 'Pay by' (Credit Card), 'Pricing Plan' (Orange 15 - \$25/month), 'Billing Cycle' (Every Month), 'Billing Email' (don+ike@telaniamail.com), 'Address' (1300 South 4th Street Suite 350), 'City' (Louisville), 'State' (Kentucky), 'Zip' (40208), and 'Country' (United States). At the bottom of the form, there is a note: 'Currently added card is : XXXXXXXXXX0001' with 'Change Card' and 'Remove Card' buttons. Finally, there are 'SAVE' and 'CANCEL' buttons at the bottom right of the form area.

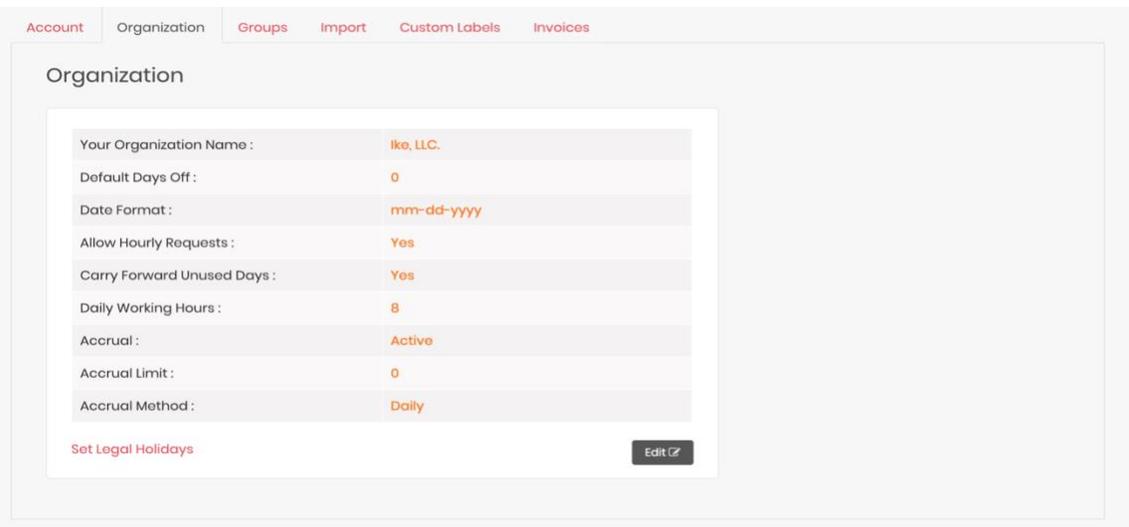
From your **Settings** tab, you can edit your **Account, Organization, Groups** and even **Import** your users (employees) or create **Custom Labels**.

Your CaptureLeave account also shows tabs for **[Dashboard]**, **[Reports]** and **[Employees]** as well as a dropdown menu for your profile.

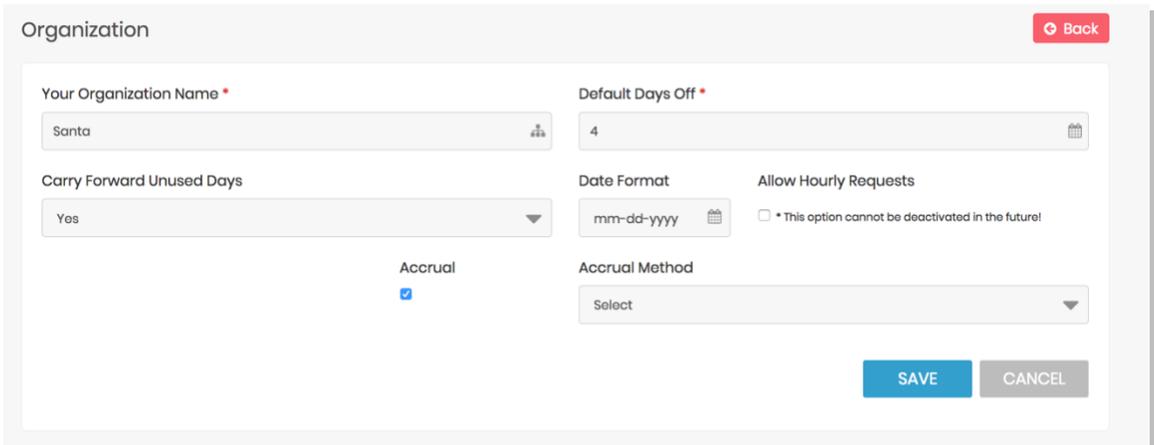
Settings

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.



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.



3. 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

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.
7. 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.

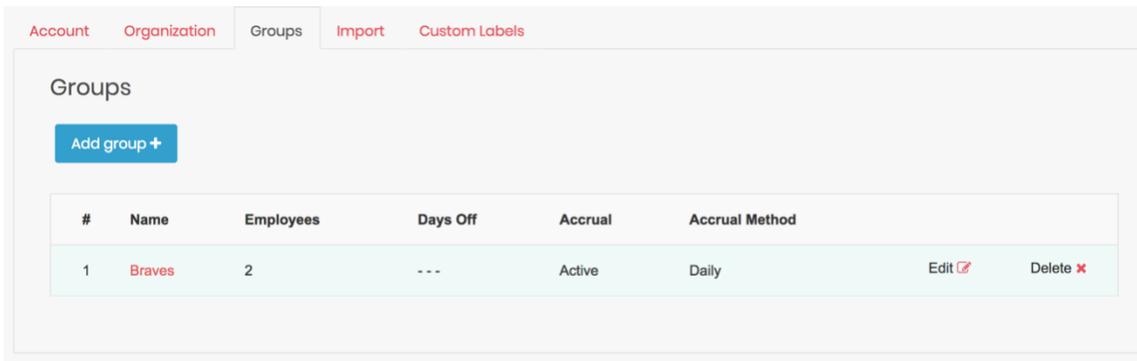
- Alternatively, you can import the system generated Annual Holidays' list.

- To get back to your Settings' tab, click the  button.

Groups

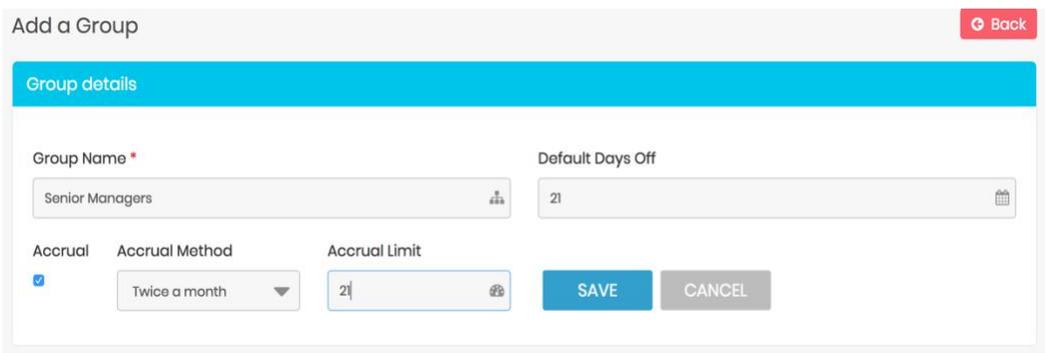
Click the '**Groups**' link to access your listing of Groups within your organization.

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



Use the steps below to successfully create Groups within CaptureLeave.

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



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

[Add group +](#)

#	Name	Employees	Days Off	Accrual	Accrual Method		
1	Braves	2	---	Active	Daily	Edit	Delete
2	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 [Back](#)

[Add employees to Senior Managers +](#) [All](#) [Senior Managers](#) [Customer Service](#) [Add group](#)

<input type="checkbox"/> All	Name	Email	Group	Days Off	Method	Group Method	Group Manager	Accrual
<input type="checkbox"/> 1	Jack Finn	saleskeymail@gmail.com	Senior Managers	12 days 5.44 hrs	Daily	Daily	Remove	✓
<input type="checkbox"/> 2	John Manager	telania+accrualm@gmail.com	Senior Managers	16 days	Daily	Daily	Remove	✓
<input type="checkbox"/> 3	Mary Beth	don+olu@telaniamail.com	Senior Managers	14 days	---	Daily	Make Manager	✓
<input type="checkbox"/> 4	Peter Gray	don+peter3121@telaniamail.com	Senior Managers	16 days	Yearly	Daily	Make Manager	✓

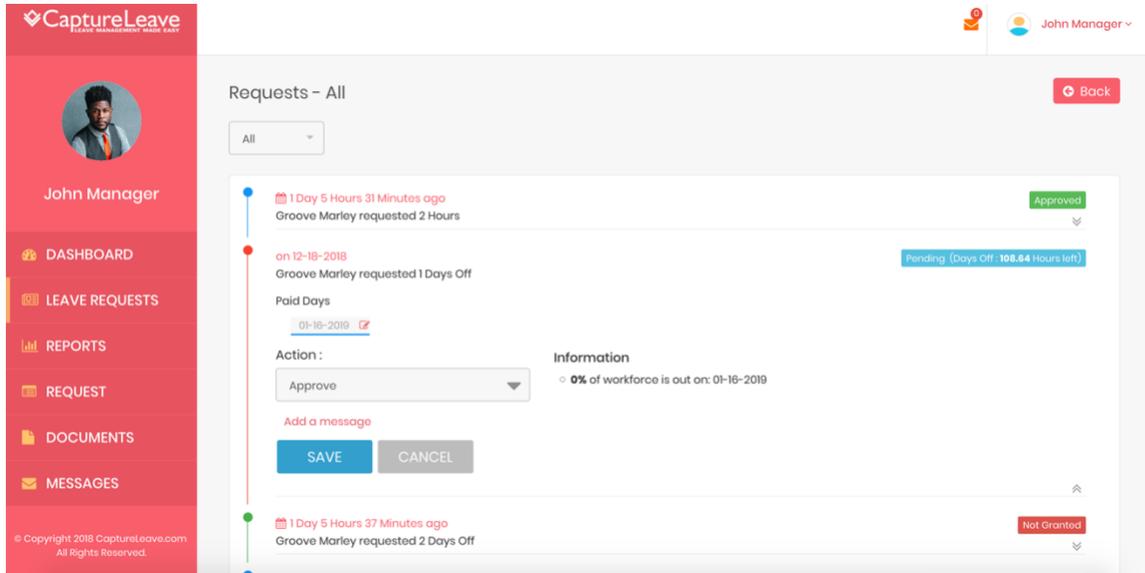
[Remove from group ✕](#)

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:

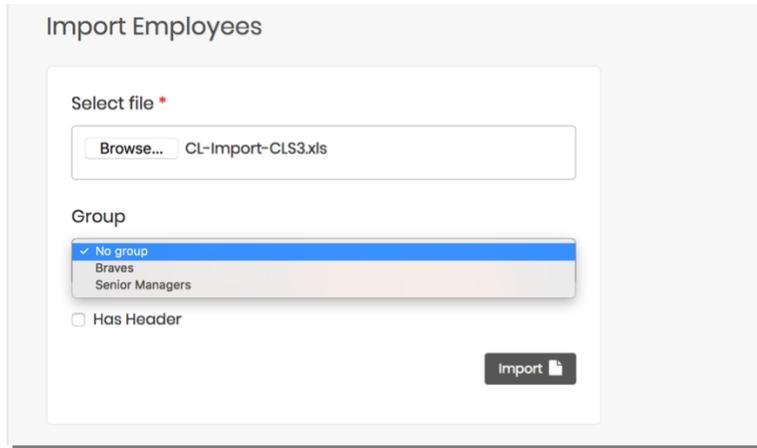


Once processed, the system administrators will receive a confirmation email about this processed leave request.

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 CaptureLeave. Click on the [Import] tab under your Settings area.



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.

Custom Labels			
Community Service	Yes		Edit  Delete 
FMLA	Yes		Edit  Delete 
PTO	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'

Add New Label

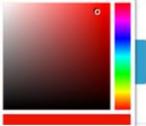
Name *

Paid

Yes 

Color

#e91b1b 



- 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 CaptureLeave Administrator Dashboard

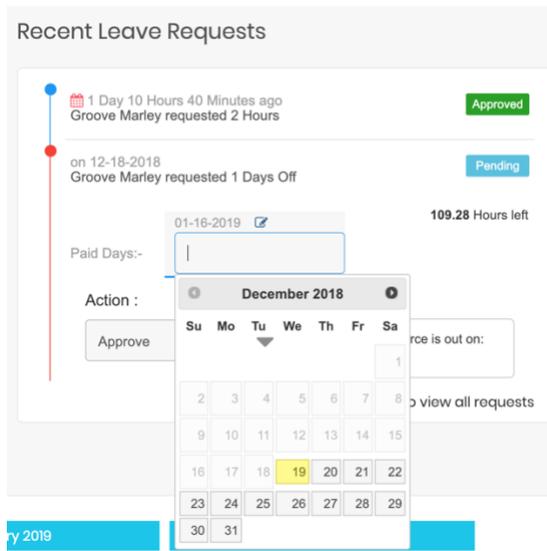
Clicking on the **Dashboard** link in your CaptureLeave account displays the **Dashboard**

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.

The dashboard interface includes a sidebar with navigation options: DASHBOARD, LEAVE REQUESTS, REPORTS, EMPLOYEES, SETTINGS, DOCUMENTS, MESSAGES, and LOG OUT. The main content area features a 'Days Off' chart showing employee counts from Dec to Feb, a list of recent requests with status indicators (Approved, Pending, Requested), a legend for leave types (Paid Day Off, Unpaid Day Off, Legal Day Off, Pending Day Off, Not Granted Day Off, FMLA, Community Work), and a 4-month calendar grid for November 2018, December 2018, January 2019, and February 2019.

Processing Leave Requests

This view provides a detailed look at a specific leave request. It includes a 'Days Off' chart and a 'Recent Leave Requests' list. The selected request shows it was approved on 12-18-2018 for 2 hours. The 'Action' dropdown is set to 'Approve'. The 'Information' section indicates that 0% of the workforce is out on 01-16-2019, and there are 109.28 hours left. A link to view all requests is provided at the bottom.



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.

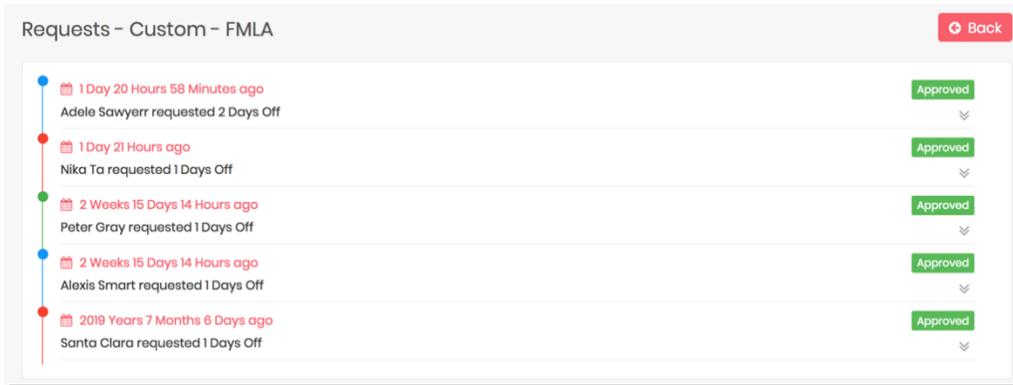
You can also click on the **Pending Day Off** label to see all pending leave requests.

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.



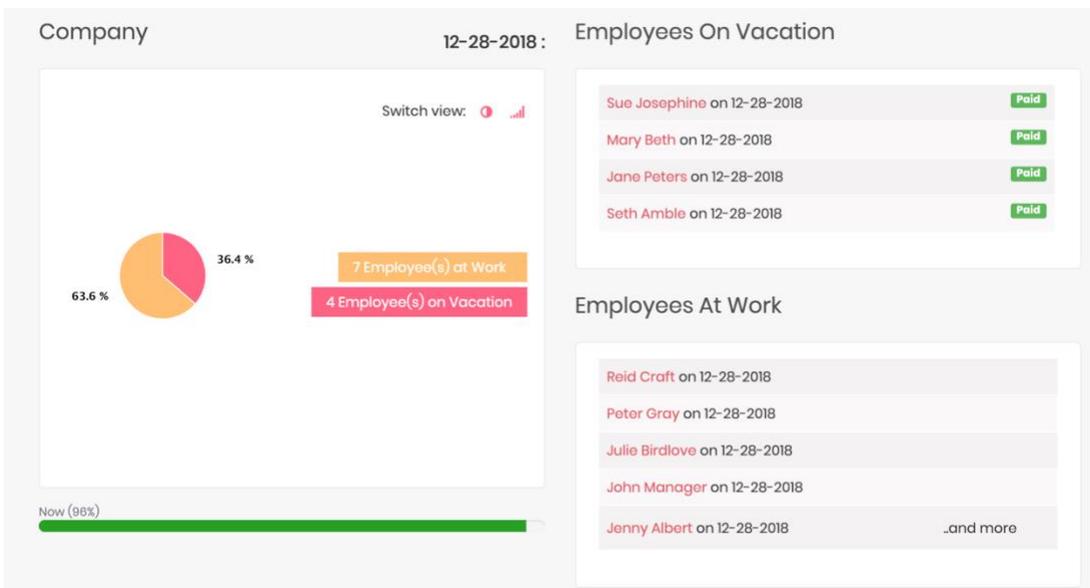
For example, clicking on [FMLA] will display all employees who have requested [FMLA] leave. You can click on the **employee's** name to see additional details about the leave request.



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:



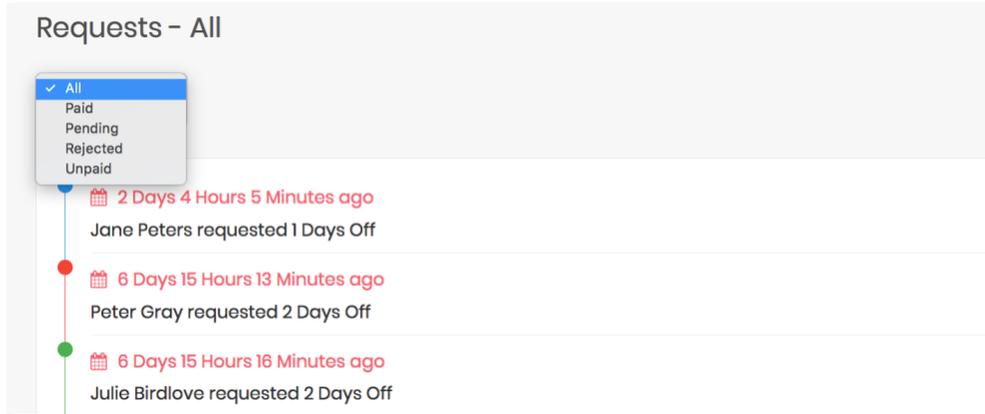
Please note that we only display the first 5 employees at work and not the entire list of employees at work.

Leave Requests

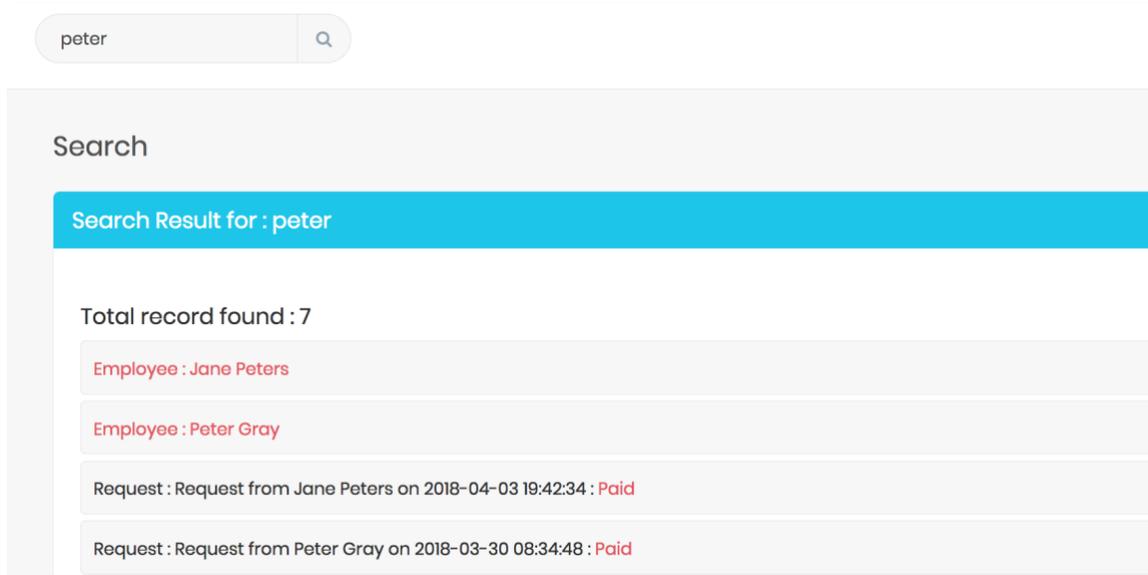
Accessing Leave Requests

Click on the  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.

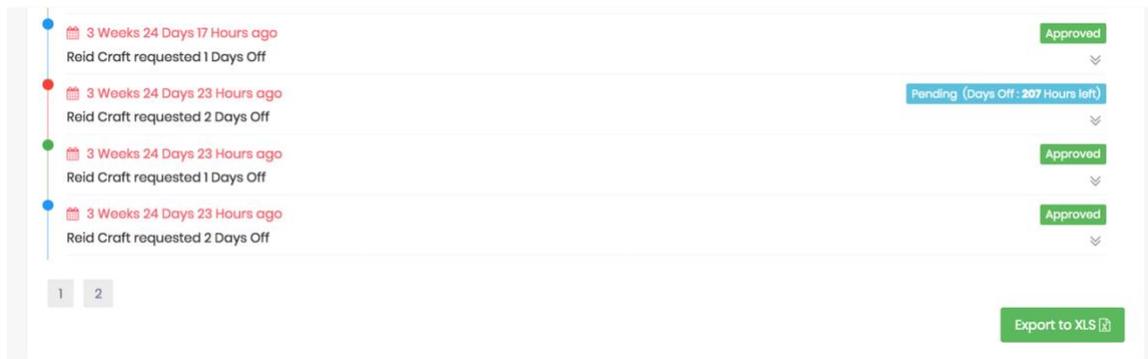
Filtering Leave Requests



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

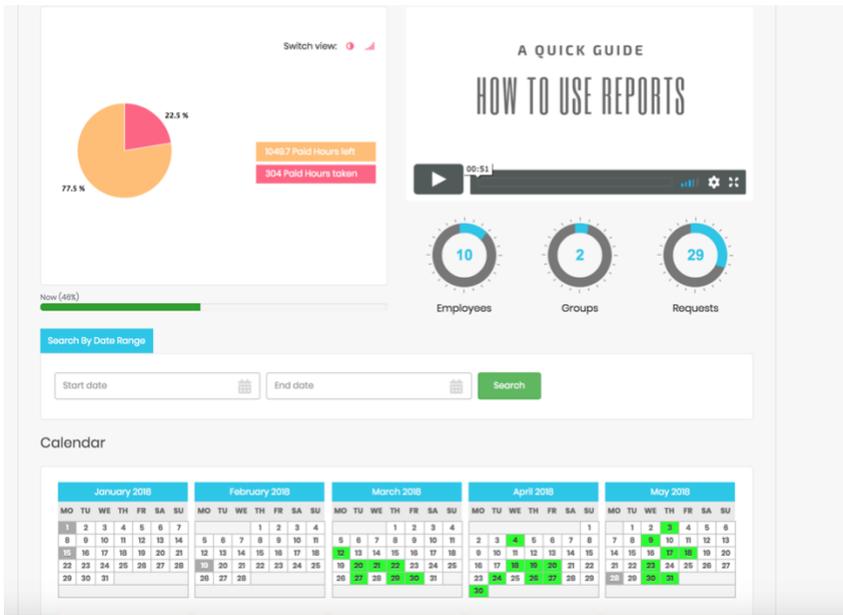


To export your Requested Leaves report, click the Export to XLS button on the bottom right corner of your page:



Reports

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



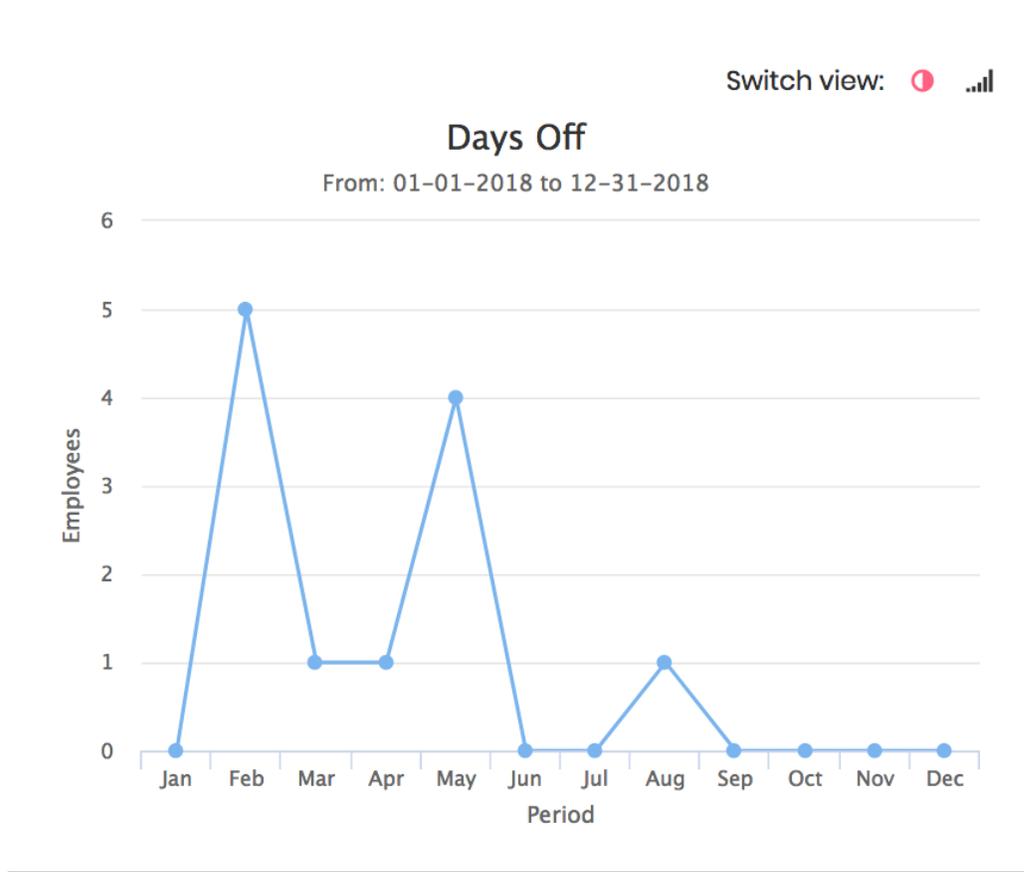
Reports are divided into three sections:

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

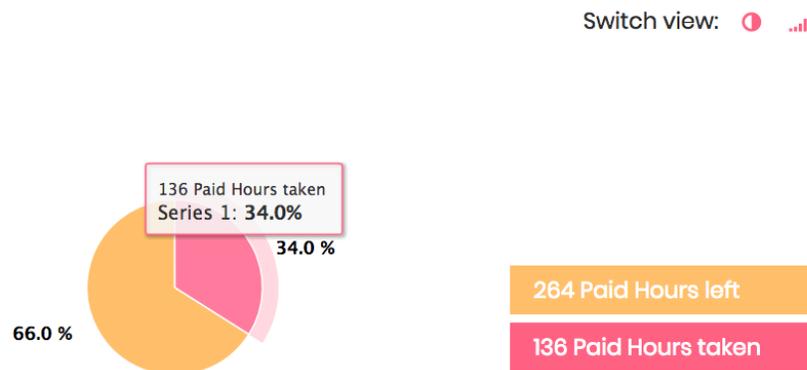
Company Leave Report

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.

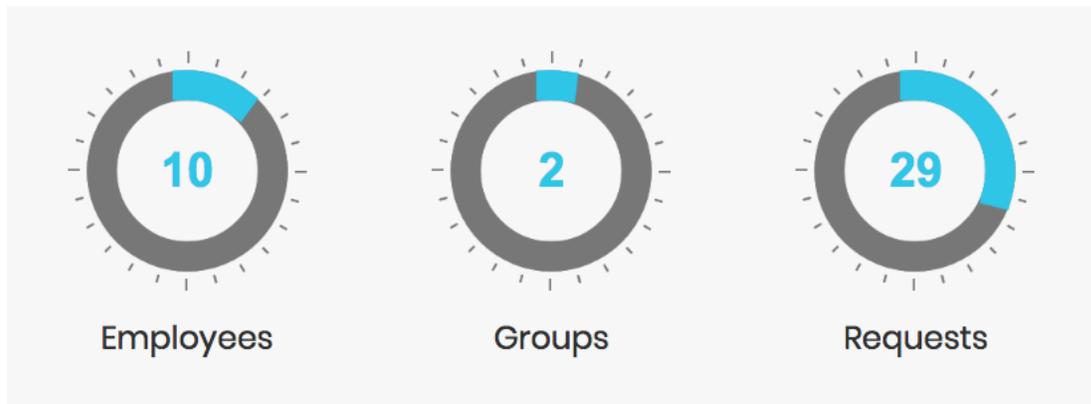
Click on the chart icon to see your Company Leave Report in the chart format



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



the pie chart.



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.

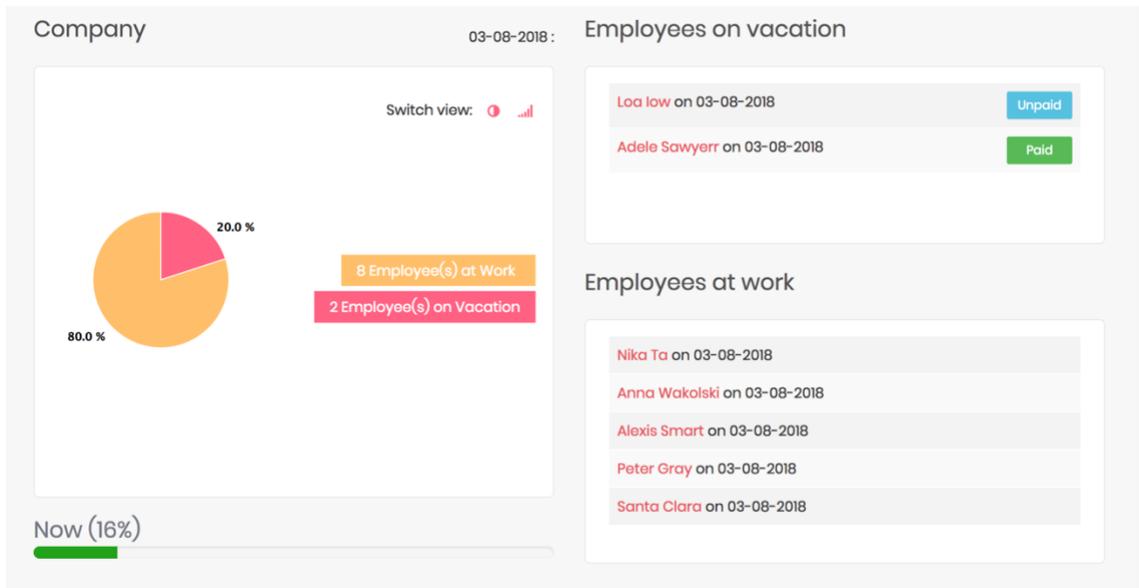
The form is titled 'Search By Date Range' in a blue header. Below the header, there are two input fields for dates, each with a calendar icon to its right. The first field contains '06-25-2018' and the second contains '06-29-2018'. To the right of these fields is a green button labeled 'Search'.

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

The screenshot shows a report titled 'Employees on Vacation'. At the top right is a red 'Back' button. Below the title, the 'Date Search Range' is specified as '05-07-2018 to 05-25-2018'. A list of employees is shown with colored dots and their names followed by their vacation dates: Seth Amble on 05-17-2018 (blue dot), Seth Amble on 05-18-2018 (red dot), Julie Birdlove on 05-23-2018 (green dot), and Jane Peters on 05-09-2018 (blue dot). At the bottom right is a green 'Export to XLS' button.

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.



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.



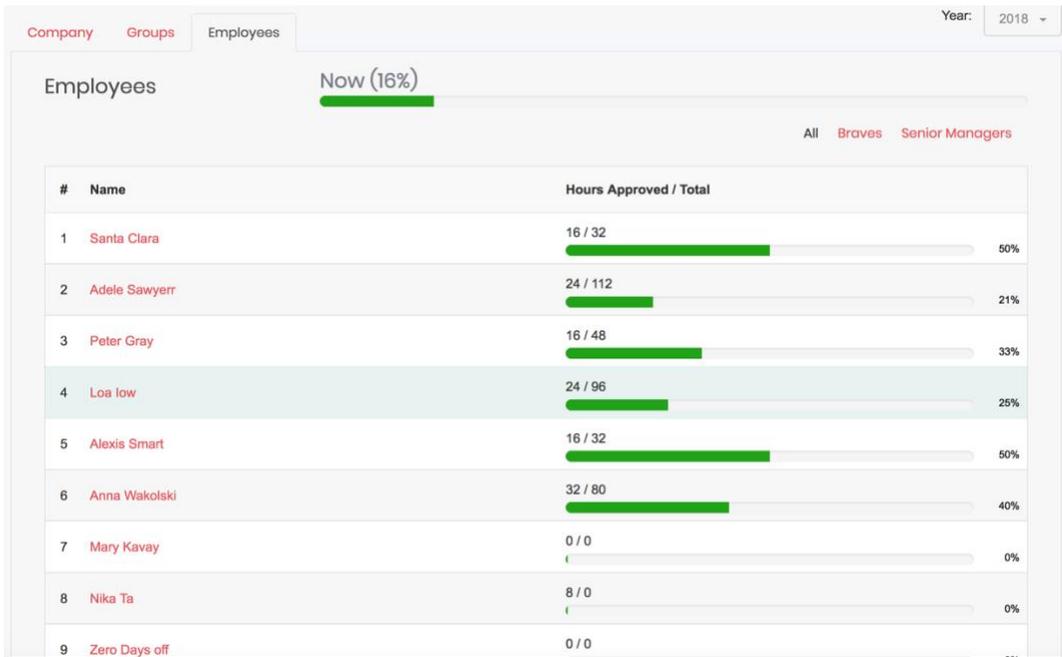
The Groups report show how users in your groups are taking their vacation days. From the example above your Braves are spending more time outside the office than your Senior Managers.

Employees Leave Report

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

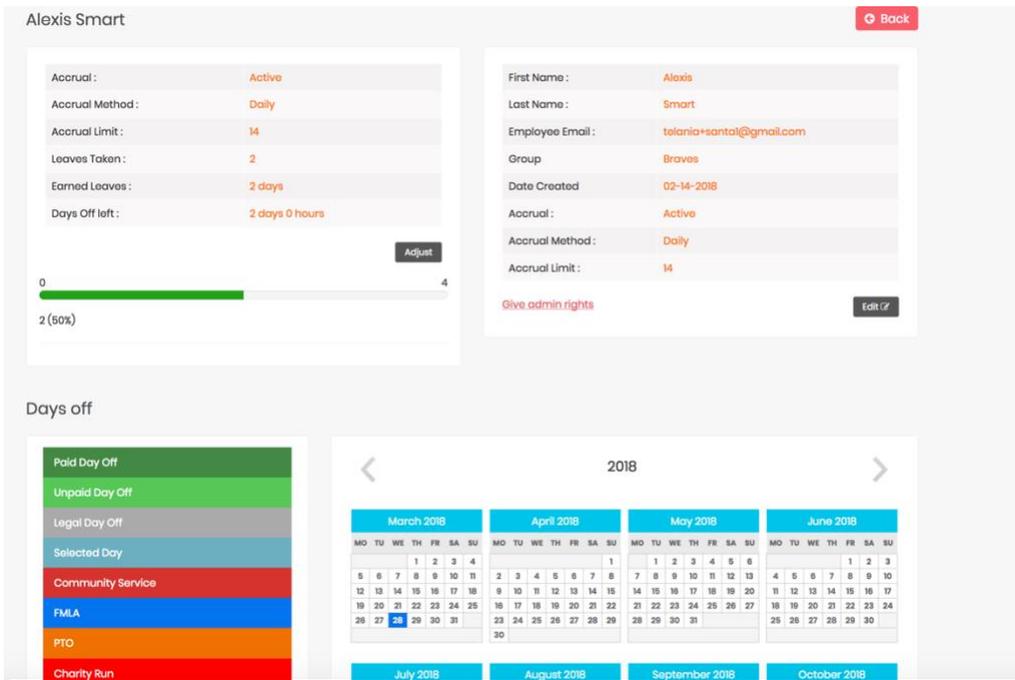
This report gives you an employee listing showing how many days off the employee has requested and approved versus total outstanding vacation days.

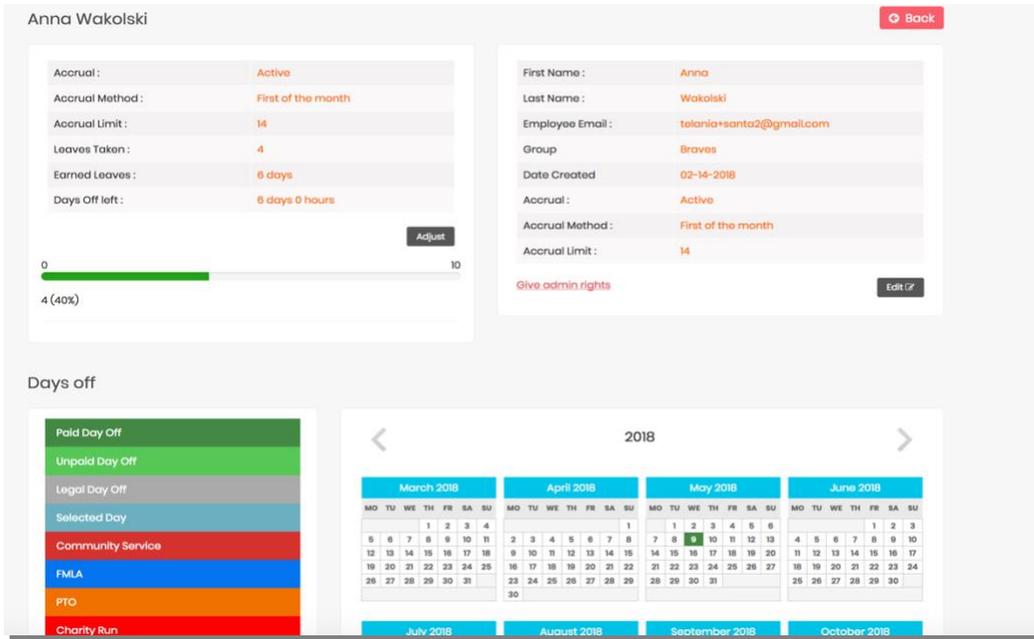
Employees Hours off Report



Employee Details

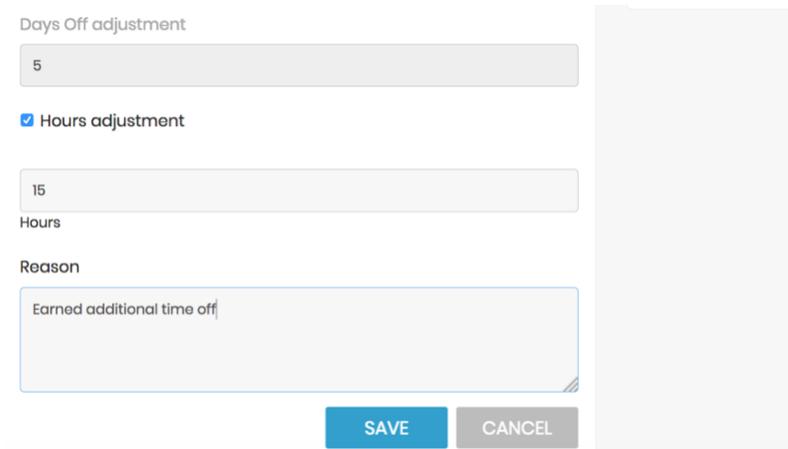
You can click on an employee's name to get a detail employee leave report.





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.



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

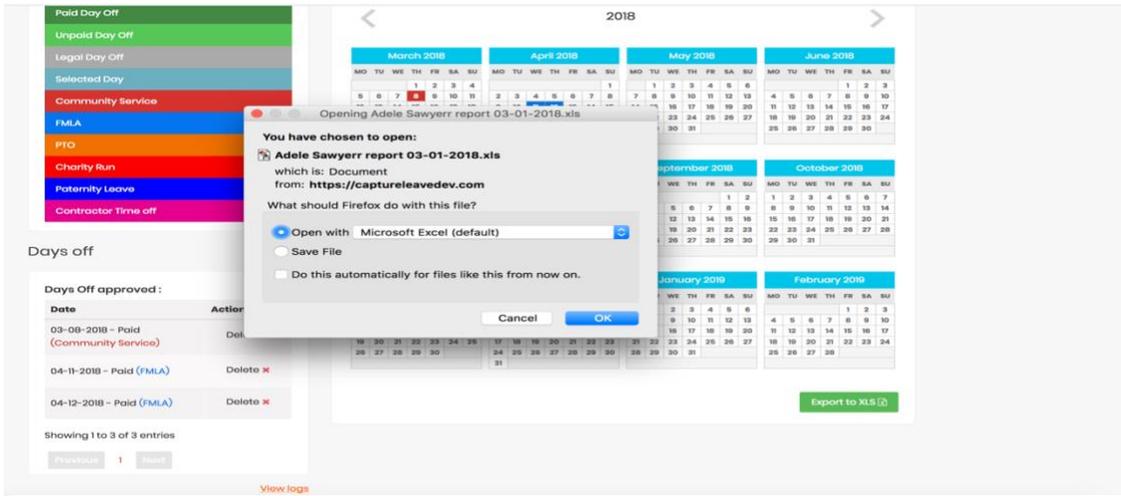
Employee Leave Report Download

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



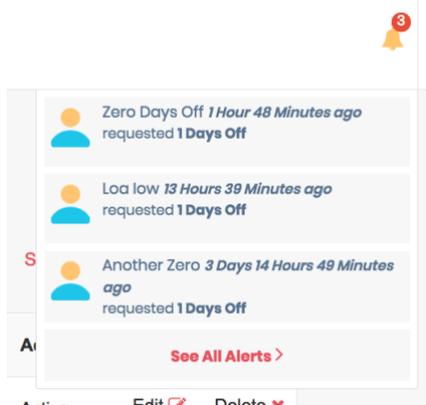
Complete Organization Report

	A	B	C	D	E	F	G	H	I	J	K	L	M	N
	Name	Email	Curs Approve	Total	Balance	Paid	Unpaid	Community Serv	FMLA	PTO	Charity Run	aternity	Leavtractor	Time off
2	Adele Sawyerr	don+sam1@t	0	112	112	24	0	8	16	0	0	0	0	0
3	Alexis Smart	telandia+santa	0	32	32	16	0	8	8	0	0	0	0	0
4	Anna Wakolski	telandia+santa	0	80	80	32	0	0	0	0	0	0	0	0
5	Another Zero	don+ero@tel	0	168	168	0	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	0
7	Mary Kavay	mary@teleapp	0	0	0	0	0	0	0	0	0	0	0	0
8	Nika Ta	don+nika@tele	0	0	0	8	0	0	8	0	0	0	0	0
9	Peter Gray	don+peter2@	0	48	48	16	0	0	8	0	0	0	0	0
10	Santa Clara	telandia+santa	0	32	32	16	0	0	8	0	0	0	0	0
11	Zero Days off	don+zero@te	0	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, CaptureLeave, 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.



When you click on the number icon, you will see all pending leave alerts. You can click on the pending alert to process it.

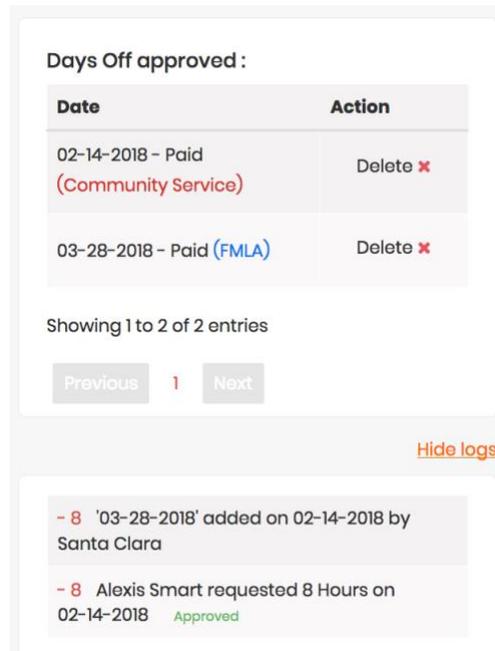
View Logs

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 Off Approved and Total Default Vacation Days allotted.



A	B	C	D	E
Name	Email	Days Off Requested	Days Off Approved	Total
Lazarus Atudiko	atudiko@stanford.edu	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 [[Employee's Name](#)] 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  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.

Add an Employee Back

Employee details

First Name * Last Name *

Employee Email * Group

Annual Paid Days Off Days * Default number of Paid Days Off is 4 Accrual Daily Working Hours Hours * Default number of Daily Working Hours is 8

Accrual Method Accrual Limit *

SAVE **CANCEL**

Edit Employee

To edit an existing employee, click the **Edit**  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

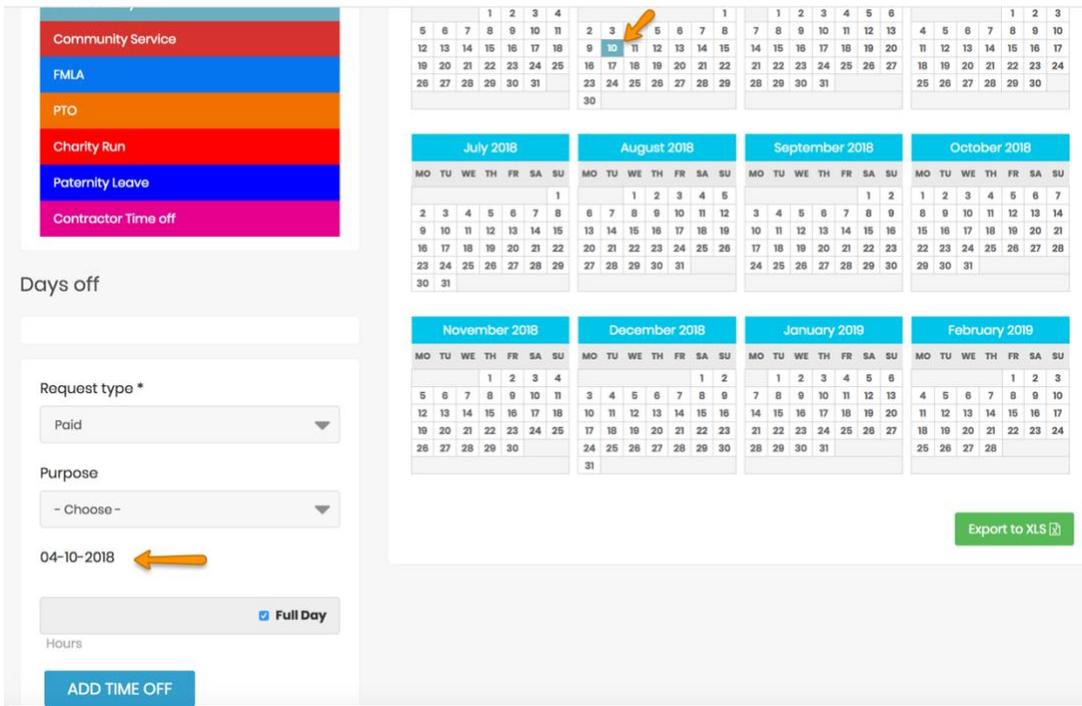
Are you sure you want to delete **Alexis Smart**

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. 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.

Add employee +

All 3rd Shift Senior Managers Add group +

#	Name	Email	Group	Days Off	Active	Accrual Method	Accrual	Edit	Delete
1	Adele Sawyerr	don+sam1@telaniamail.com	---	14 days	Yes	Daily	Active		
2	Alexis Smart	telania+santa1@gmail.com	3rd Shift	4 days	Yes	Daily	Active		
3	Anna Wakolski	telania+santa2@gmail.com	3rd Shift	10 days	Yes	First of the month	Active		
4	Another Zero	don+ero@telaniamail.com	Senior Managers	21 days	Yes	Daily	Active		
5	Loa low	don+lod2@telaniamail.com	---	12 days	Yes	Every 2 weeks	Active		
6	Mary Kavay	mary@eleapuser.com	---		Yes	Daily	Active		

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

Employees in 3rd Shift

Add employees to 3rd Shift + All 3rd Shift Senior Managers Add group

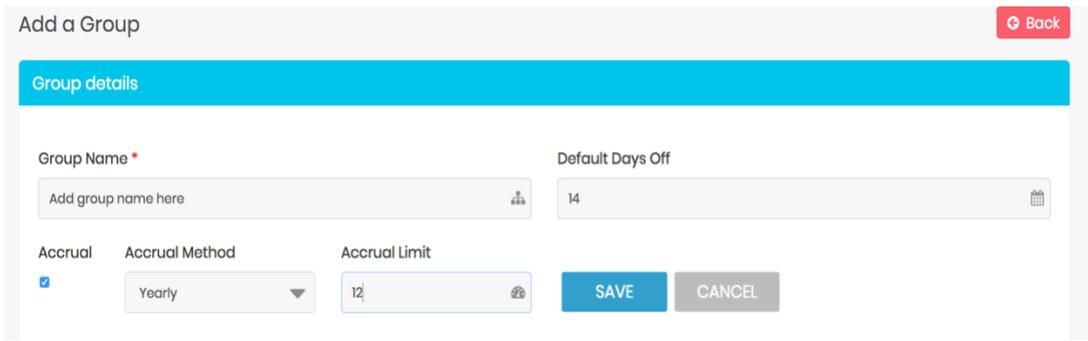
<input type="checkbox"/>	All	Name	Email	Group	Days Off	Accrual Method	Accrual
<input type="checkbox"/>	1	Alexis Smart	telania+santa1@gmail.com	3rd Shift	4 days	Daily	Active
<input type="checkbox"/>	2	Anna Wakolski	telania+santa2@gmail.com	3rd Shift	10 days	First of the month	Active

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.



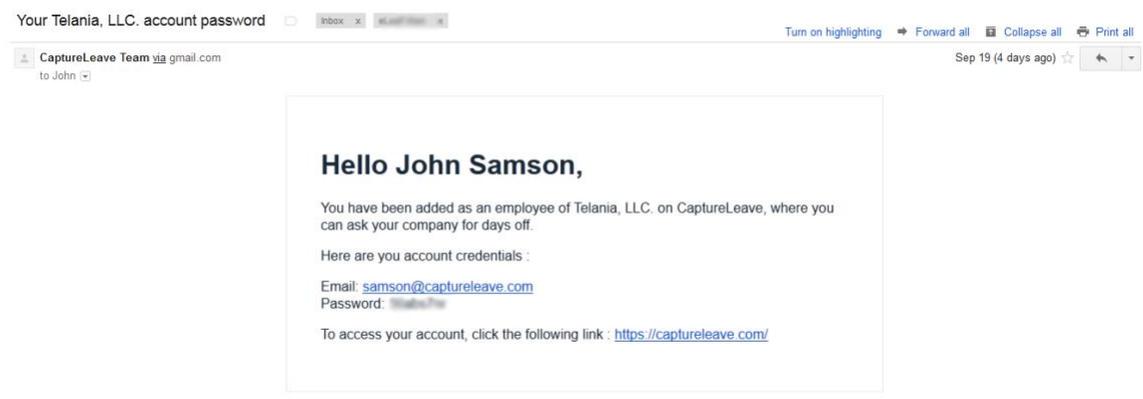
The screenshot shows a web form titled "Add a Group" with a "Back" button in the top right corner. The form is divided into a "Group details" section and an "Accrual" section. In the "Group details" section, there is a "Group Name" field with a placeholder "Add group name here" and a "Default Days Off" field with the value "14". In the "Accrual" section, there is a checked checkbox for "Accrual", a "Yearly" dropdown for "Accrual Method", and a "12" input field for "Accrual Limit". At the bottom right of the form are "SAVE" and "CANCEL" buttons.

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 <https://captureleave.com> 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?](#)

Remember me

SIGN IN

Don't have an account? [Sign Up](#)

Employee/User Dashboard

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

CaptureLeave
LEAVE MANAGEMENT MADE EASY

Zero Days off

DASHBOARD

REQUEST

Dashboard

Accruals

Accrual:	Active
Accrual Method:	Daily
Accrual Limit:	14
Days Off left:	-1 days

Requested time off

2 Hours 14 Minutes ago
You requested 1 Days Off

Approved

[Click here to make a new request](#)

Paid Day Off

Unpaid Day Off

Legal Day Off

2018

March 2018

April 2018

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All Rights Reserved.

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 **REQUEST** tab to get started.

Employee/User Leave Request Form



When the user clicks the **REQUEST** button, they get the Leave Request Form. The employee simply selects 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

Request type *

Purpose

Reason

Days:

- 01-24-2019 Delete ✕
- 01-23-2019 Delete ✕
- 01-31-2019 Delete ✕

SEND REQUEST

CANCEL

Paid Day Off

Unpaid Day Off

Legal Day Off

Pending Day Off

Selected Day Off

<
|
>

November 2018

MO	TU	WE	TH	FR	SA	SU
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30		

December 2018

MO	TU	WE	TH	FR	SA	SU
					1	2
3	4	5	6	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						

January 2019

MO	TU	WE	TH	FR	SA	SU
		1	2	3	4	5
6	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		

Information

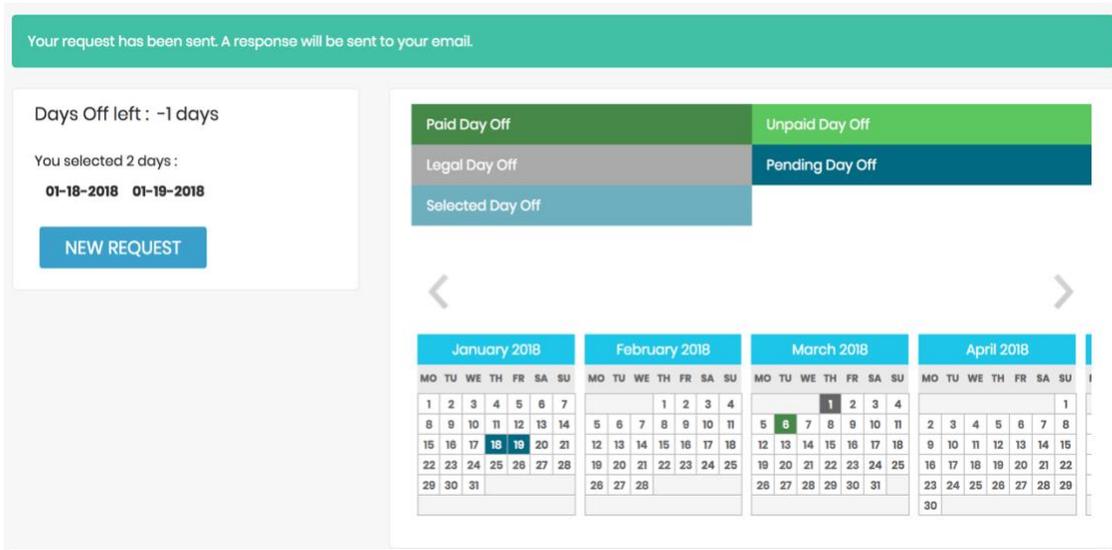
9% of workforce is out on: 01-24-2019

0% of workforce is out on: 01-23-2019

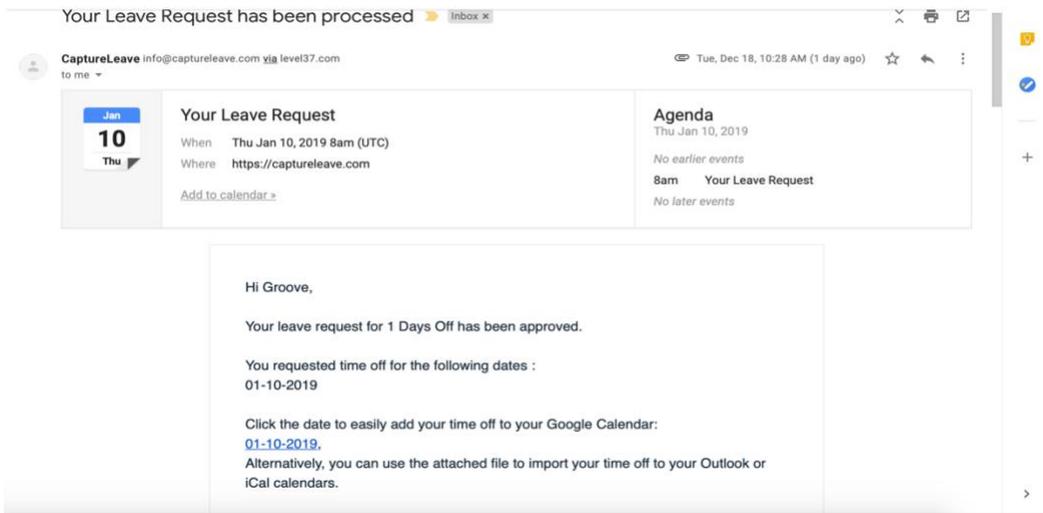
27% of workforce is out on: 01-31-2019

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.



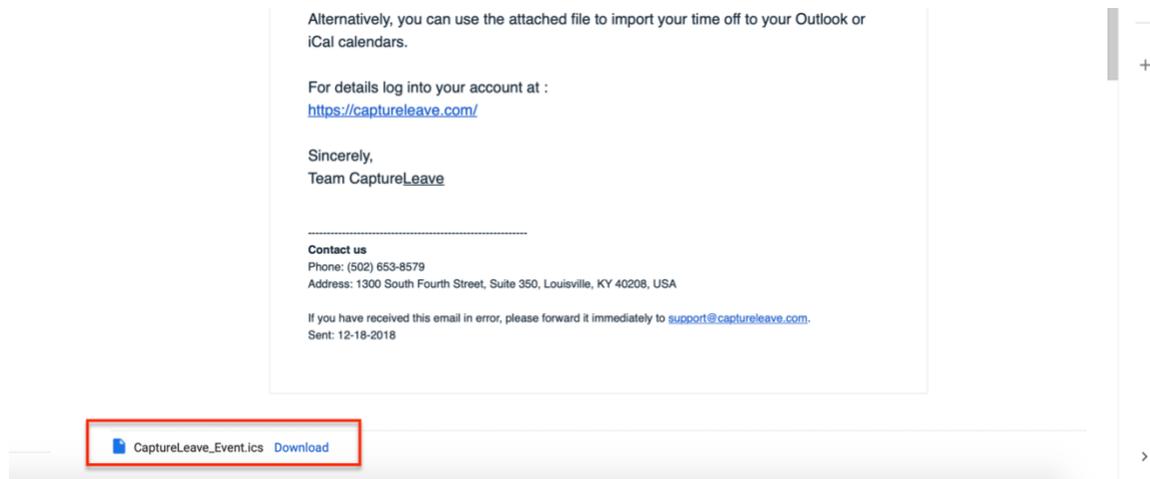
Once your request is processed (approved or rejected), you will receive an email alert about the result and you can sign into your account to see the details.



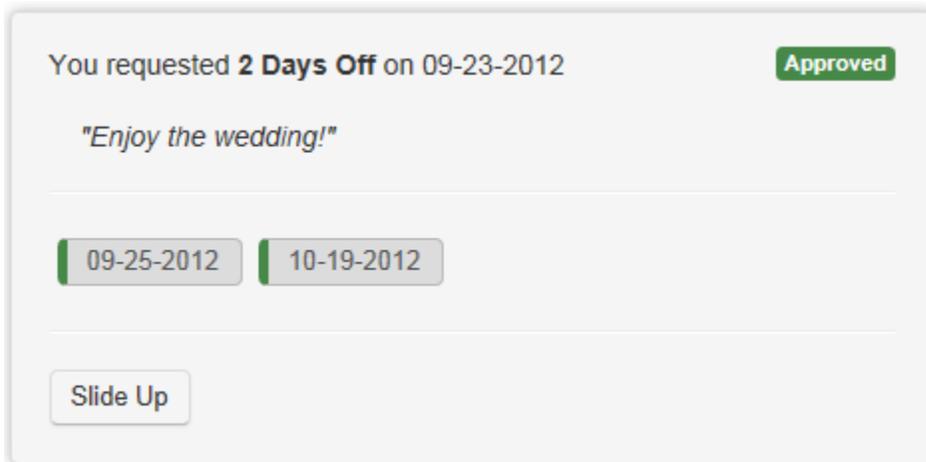
Add to Calendar

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



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.



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.

The screenshot shows the 'Add Document' form in the CaptureLeave system. The form is titled 'Add Document' and is part of a tabbed interface with 'Documents', 'Add Document', and 'Document Categories' tabs. The form fields include: 'Name' (text input with 'Leaves of absence policy'), 'Category' (dropdown menu with 'Leave Policies'), 'Attach files' (file upload area with 'Choose Files' button and a file named '1544012427Break_Periods_Policy_-_Sample.doc'), 'Access' (dropdown menu with 'All'), and 'Status' (dropdown menu with 'Active'). At the bottom are 'Save' and 'Cancel' buttons.

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 :

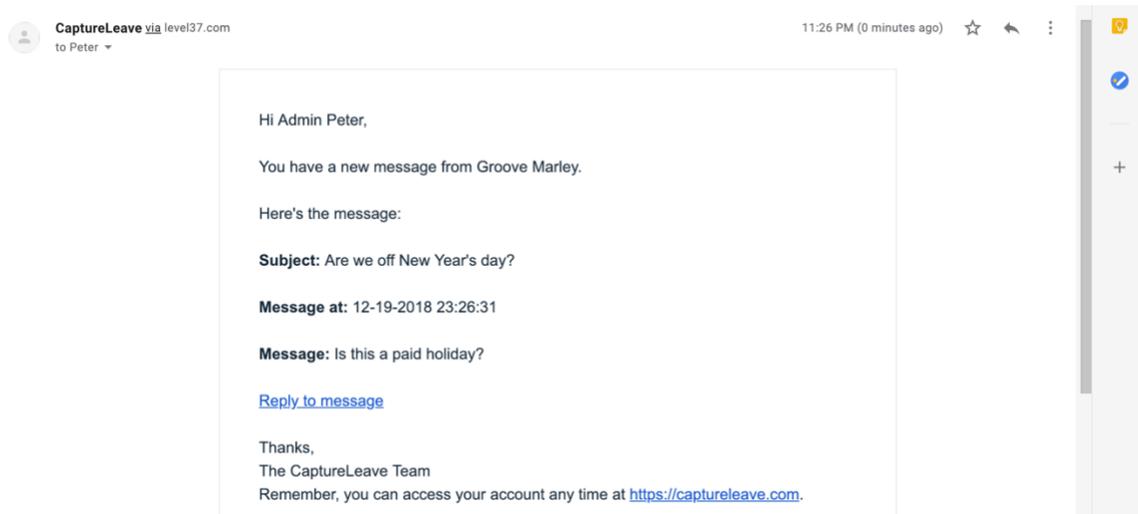
Individuals

Select Individuals :

Jenny Albert (Ike, LLC.) ✕ Julie Birdlove (Ike, LLC.) ✕ Peter Gray (Ike, LLC.) ✕

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.



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 New Year's day?
 Message at: 12-19-2018 23:26:31
 Message: Is this a paid 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.

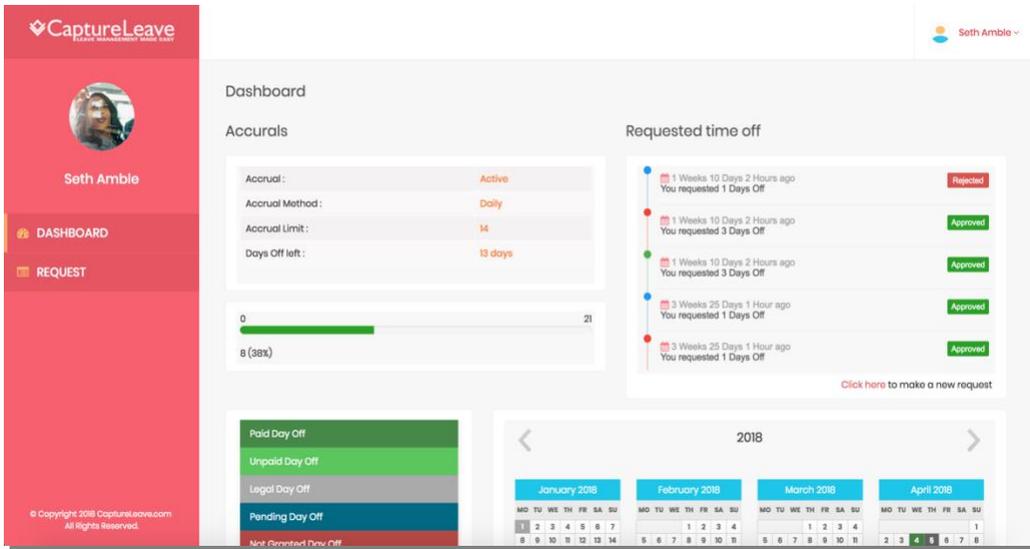


Jenny Albert ▾

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.



Support

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

Contact CaptureLeave 24/7 via

Phone : (502) 638-2399

Fax : (502) 585 2345

Email : support@captureleave.com