

README - Leave Management - v2

This Airtable base automates leave management, including team organization, leave entitlements, request submissions, approval workflows, and calendar integrations. It calculates prorated leave, tracks accumulations, and integrates with Slack and calendar services (Outlook/Google Calendar) for notifications and events.

Features

- **Team Management:** Create and manage teams using forms.
- **Leave Structure:** Define leave groups, categories, entitlements, accruals, and approval processes.
- **Employee Management:** Assign employees to teams and leave categories; track active status and employment duration.
- **Leave Calculation:** Automatically compute available leave based on employment duration, leave structure, and accruals.
- **Leave Requests:** Employees submit full or half-day leave requests with optional notes and documents.
- **Approval Workflow:** Approvers approve/reject requests; notifications sent via Slack.
- **Public Holiday Awareness:** Leave duration excludes weekends and AI-fetched public holidays.
- **Rollover Automation:** Unused leave rolls over to the next period.
- **Calendar Integration:** Approved leave syncs to team calendars with event IDs.

Tables & Relationships

Team Structure

Purpose: Manages team creation and populates form dropdowns.

Links To: [Team Members Information](#) Table for assigning employees to teams; used for grouped leave request views.

Team Name

- **Type:** Formula
- **Description:** Displays the team name for reference in forms and views.

Team

- **Type:** Single Select
- **Description:** Dropdown for selecting a team.

Note: Must be set up for each organization before deployment to avoid duplicate names.

Message Approver Directly on Slack

- **Type:** Checkbox
- **Description:** Enables direct Slack notifications to approvers when checked.

Leave Structure Table

Purpose: Defines leave groups, categories, entitlements, and approval workflows.

Links To: [Team Members Information](#) Table to assign employees to groups, determining approval and notification workflows.

Group Name

- **Type:** Single Line Text
- **Description:** Specifies the name of the leave group.

Category

- **Type:** Single Select
- **Description:** Distinguishes between leave requiring approval and auto-approved leave. Can reflect titles (e.g., "Dr"). May require setup; defaults to "Approval Required" or "Directly Approved."

Note: May therefore require setup.

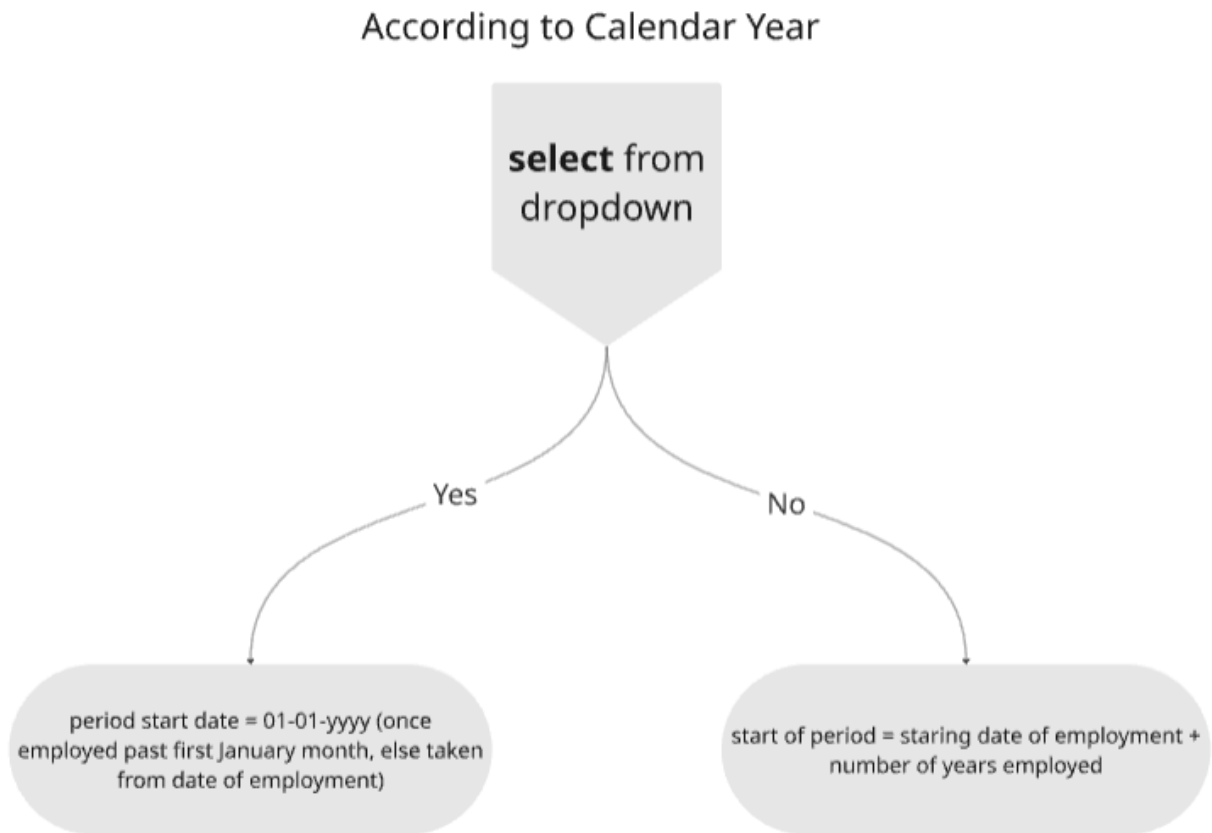
Number of Days Leave

- **Type:** Number
- **Description:** Defines annual leave entitlement in days.

According to Calendar Year

- **Type:** Single Select

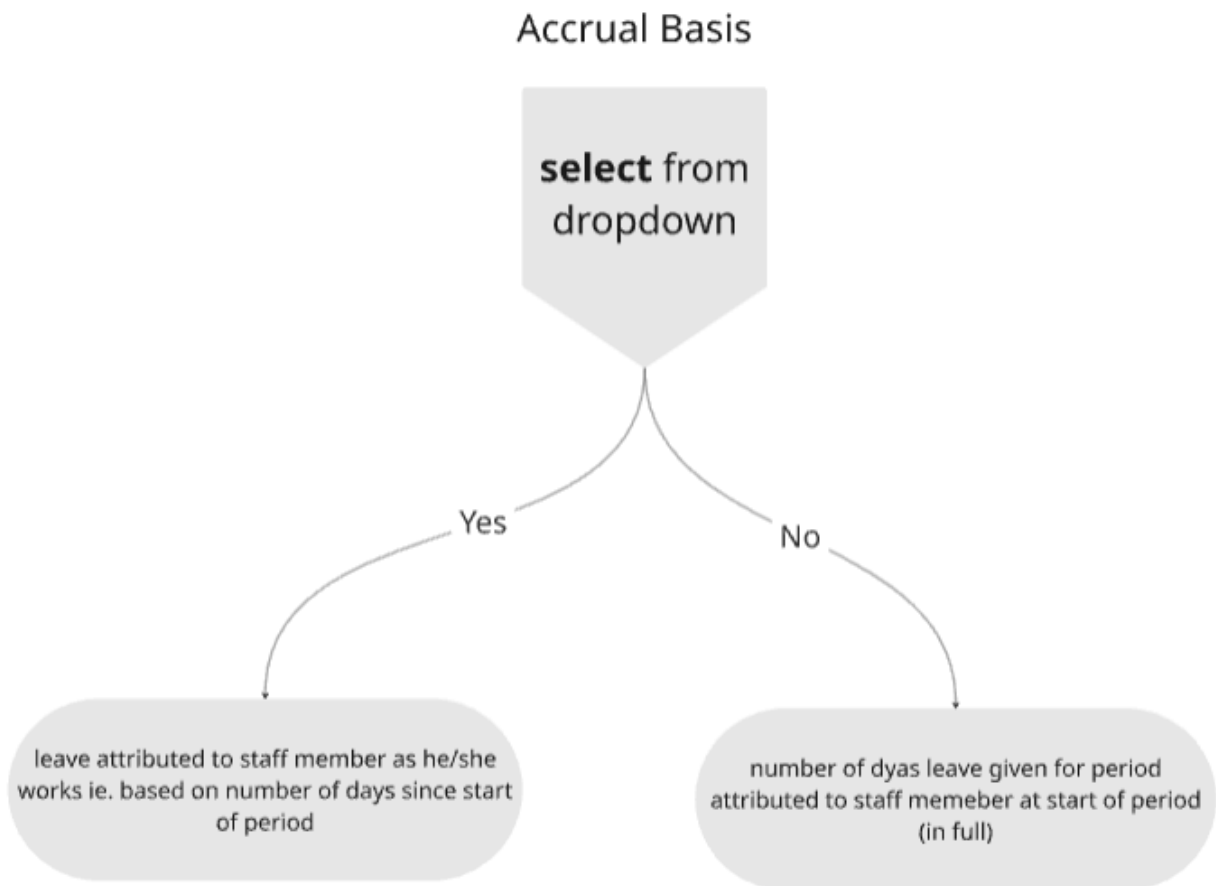
- **Description:** Indicates if leave periods align with the calendar year (Jan 1–Dec 31).



Accrual Basis

- **Type:** Single Select

- **Description:** Specifies if leave accrues over time rather than being granted upfront.



Message Approver Directly on Slack

- **Type:** Checkbox
- **Description:** Enables direct Slack notifications for approvers.

Note: Create groups to cover all combinations of approval requirements, leave days, calendar year alignment, and accrual basis.

Team Members Information

Purpose: Tracks employee details and leave entitlements.

Links To: Leave Requests Table for linking leave requests to employees; Accumulated Leave Table for leave accumulation records.

Active

- **Type:** Single Select
- **Description:** Determines if employee IDs appear in leave request form dropdowns (only active employees are shown).

Years of Employment

- **Type:** Formula
- **Description:** Calculates years of employment.

Formula Explanation:

```
DATETIME_DIFF(TODAY(), {Employment Start Date}, "years")
```

Subtracts the employee's start date from the current date to compute years employed, used to determine prorated or accrued leave entitlement in [Leave Available for Period](#)

Employment Start This Year

- **Type:** Formula

```
IF(YEAR({Employment Start Date}) = YEAR(TODAY()), "Yes", "No")
```

Determines if employee started working at company this year; used in determining leave entitlement in [Leave Available for Period](#)

Current Period Start & End Date

- **Type:** Formula
- **Description:** Defines the leave period.

Formula Explanation:

- **Start:** If **According to Calendar Year** is checked, sets to January 1 of the current year or employee start date plus years employed. Otherwise, uses employee start date plus years employed.
- **End:** One year from the start date.

```
IF({According to Calendar Year} = "Yes",  
    DATETIME_FORMAT DATEADD({Employment Start Date}, {Years of Employment},  
    "years"), "YYYY-01-01"),  
    DATEADD({Employment Start Date}, {Years of Employment}, "years")  
)
```

```
DATEADD({Current Period Start Date}, 1, "year")
```

Due for Restart

- **Type:** Formula

- **Description:** Triggers leave rollover.

Formula Explanation:

```
IF(TODAY() = {Current Period End Date}, "Yes", "No")
```

Checks if the current date matches the period end date to initiate rollover automation.

Leave Available for Current Period

- **Type:** Formula
- **Description:** Calculates available leave.

Formula Explanation:

```
IF({According to Calendar Year} = "Yes",

    IF({Employment Start This Year} = "Yes",

        IF({Accrual Basis} = "Yes",

            (DATETIME_DIFF(TODAY(), {Employment Start Date}, "days")) * ({Number of Days
            Leave per Period}/365) - {Leave Taken for Period},

            (DATETIME_DIFF({Current Period End Date}, {Employment Start Date}, "days")) *
            ({Number of Days Leave per Period}/365) - {Leave Taken for Period}

        ),

        IF({Accrual Basis} = "Yes",

            (DATETIME_DIFF(TODAY(), {Current Period Start Date}, "days")) * ({Number of
            Days Leave per Period}/365) - {Leave Taken for Period},

            {Number of Days Leave per Period} - {Leave Taken for Period}

        )

    ),

    IF({Accrual Basis} = "Yes", (DATETIME_DIFF(TODAY(), {Current Period Start
    Date}, "days")) * ({Number of Days Leave per Period}/365) - {Leave Taken for
    Period},

    {Number of Days Leave per Period} - {Leave Taken for Period}

)
```

)

- If calendar year-based:
 - For new employees, prorates leave from start date to either today (accrual basis) or period end (non-accrual).
 - For others, calculates accrued leave from period start to today or full entitlement, minus leave taken.
- If not calendar year-based, calculates similarly but uses period start date.
- Subtracts `Leave Taken for Period` to reflect remaining leave.

Leave Taken for Period

- **Type:** Rollup
- **Description:** Aggregates approved, non-canceled leave from Leave Requests Table within the current period.

Accumulated Leave

- **Type:** Rollup
- **Description:** Sums leave from Accumulated Leave Table.

{conditions can be set not to roll up for certain [Category](#) or [Team](#) ect}

Previously Accumulated Leave

- **Type:** Number
- **Description:** Manually entered leave accumulated before the current period.

Slack Email of Approver

- **Type:** Formula
- **Description:** Resolves approver email.

Formula Explanation:

```
IF({Slack Email of Approver - by Category}, {Slack Email of Approver - by
Category},
  IF({Slack Email of Approver - by Individual}, {Slack Email of Approver -
by Individual},
    {Slack Email of Approver - by Team}
  )
)
```

Prioritizes category-based approver email, then individual, then team-based, ensuring correct Slack notifications.

Accumulated Leave

Purpose: Tracks carried-over and available leave.

Links To: [Team Members Information](#) Table for recording leave at creation or rollover.

Accumulation Type

- **Type:** Single select
- **Description:**

Leave Available for Period

- **Type:** Number
- **Description:** Populated by roll over or when new team member added in [Team Members Information](#) (difference specified by [Accumulation Type](#))

WARNING: Populated via "New Team Member" automation (requires form submission) or "Restart and Roll Over" automation. Manual intervention needed if forms are bypassed.

Public Holidays

Purpose: Stores South African public holidays for accurate leave duration calculations.

Links To: [Leave Requests](#) Table for excluding holidays in duration calculations.

AI Generated List of Public Holidays

- **Type:** Date
- **Description:** Public holiday date.

Year

- **Type:** Formula
- **Description:** Extracts year from holiday date.

Formula Explanation:

```
YEAR({Holiday Date})
```

Returns the year of the holiday for linking to leave requests.

Note: Requires manual updates to add holidays for future years.

<input type="checkbox"/>	# Public Holidays Year	AI-Generated List of...	Linked "Employee..." ⓘ	+
1	2025	'2025-01-01','2025-03-...	92 93 94 95 96 97	
2	2026	• Searching the web...		
+				

Leave Requests

Purpose: Manages leave applications and approvals.

Links To: [Team Members Information](#) Table for employee data; Public Holidays Table for holiday-aware duration calculations.

Employee ID

- **Type:** Single Select

- **Description:** Limited to active employees from Team Members Information Table.

Leave Application

Please complete the following form to complete your leave request

The screenshot shows a form interface for a 'South African ID Number' field. At the top, there is a header bar with the field name and a 'Required' toggle switch which is turned on. Below the header, the main form area contains the text 'Lets start with your ID number' and 'Add some help text' with a '+ Add' button. A section below this, highlighted in light blue, contains a toggle switch for 'Limit record selection to a view' which is also turned on. Below this toggle is a dropdown menu currently showing 'ACTIVE (NON TEST) MEMBERS'. A small information box below the dropdown states 'Record selection will be limited to records from ACTIVE (NON TEST) MEMBERS'. At the bottom of this section is a toggle switch for 'Show field only when conditions are met' which is currently turned off.

Team Members Calendar Emails

- **Type:** Lookup
- **Description:** Lists calendar emails for team members.

Year Leave Start and End Date

- **Type:** Formula
- **Description:** Extracts year from leave dates.

Formula Explanation:

```
YEAR({Leave Start Date})
```

```
IF(YEAR({Leave End Date}) = YEAR({Leave Start Date}), BLANK(), YEAR({Leave End Date}))
```

Extracts the year of the start date and, if different, the end date to link with public holidays.

Public Holidays Year

- **Type:** Linked Record
- **Description:** Populated via "1st LR" automation to link holidays for duration calculation.

Duration of Leave

- **Type:** Formula
- **Description:** Calculates leave duration.

Formula Explanation:

```
IF({Half-Day} = TRUE(), 0.5, WORKDAY_DIFF({Leave Start Date}, {Leave End Date}, {Public Holidays}))
```

Returns 0.5 days for half-day leave; otherwise, calculates working days between start and end dates, excluding weekends and public holidays.

WARNING: "1st LR" automation requires form submission to link public holidays; manual intervention needed otherwise.

Amend Leave Requests

Purpose: Handles cancellations of approved leave.

Links To: [Leave Requests](#) Table for selecting approved, non-canceled, current-period leave records.

Leave Record ID

- **Type:** Single Select
- **Description:** Limited to approved, non-canceled, current-period leave from Leave Requests Table.

Leave Requests Record Number

Required ☒

Leave Requests Record Number

Add some help text

+ Add

☒ Limit record selection to a view

APPROVED NOT-CANCELLED CURRENT LEAVE REQUESTS

Record selection will be limited to records from APPROVED NOT-CANCELLED CURRENT LEAVE REQUESTS

☐ Show field only when conditions are met

Workflow

1. **Setup:** Create teams (Team Structure Table), define leave categories (Leave Structure Table), add employees (Team Members Information Table).
2. **Leave Requests:** Employees submit requests via forms (Leave Requests Table).
3. **Approvals:** Approvers review and approve/reject; notifications sent via Slack.
4. **Calculations:** Leave balances update automatically.
5. **Rollover:** Unused leave rolls over to the next period.

User Interface

- **Approved View:** Displays approved, non-canceled leave, color-coded by team.
- **Undecided View:** Shows pending requests, dulled colors for overlaps, grouped by team.

Usage Instructions

Backend Setup

1. **Team Structure Table:** Populate teams first for form dropdowns.
2. **Leave Structure Table:** Define leave groups, categories, and entitlements.
3. **Team Members Information Table:** Add employees, link to teams/categories, set `Active` status.

Submitting Leave

1. Select active Employee ID.
2. Choose leave type.
3. Specify start/end dates and half-day option.
4. Add notes/documents.
5. Submit.

Approval Workflow

- Approvers review requests and approve/reject.
- Notifications sent via Slack (team, category, or individual channels/users).

Post-Approval

- Approved leave triggers notifications and calendar updates.
- Rejected leave sends rejection messages.

Leave Cancellation

- Updates calendar events to remove attendees except the requester.

Form Dependencies

Form	Required Data	Notes
Create Team Member	Team Structure Table, Leave Structure Table	Teams and categories must exist; <code>Active</code> filters dropdowns.
Leave Application	Team Members Information Table, Leave Structure Table, Public Holidays Table	Only active members shown; categories determine approvals.
Cancel Approved Leave	Leave Requests Table	Limited to approved, non-canceled, current-period leave.