

# Airtable README Explanation - Nellis Leave Management - bespoke v2

This document explains how the **Leave Detail**, **Leave Overview**, **Sick Leave**, **Work from Home**, and **Vacation Leave** tables work together, and how the **automations** enforce caps and update records.

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## Leave Detail — Where Each Leave Request Begins

Every leave request is created in **Leave Detail**.

### Key Calculated Fields

#### Number of Working Days

Used everywhere as the basis for calculations.

```
WORKDAY_DIFF({Start Date}, {End Date})
```

#### Exceed Sick Leave Allowance (Per Event)

Flags single-event violations (more than 5 working days).

```
IF(AND(Type="Sick Leave", {Number of Working Days} > 5), "Yes", "No")
```

#### Exceed Vacation Leave Allowance (Per Event)

Flags single-event violations (more than 7 working days).

```
IF(AND(Type="Vacation Leave", {Number of Working Days} > 7), "Yes", "No")
```

### Linked Fields Updated by Automation

When a request is submitted, the system connects the record to the correct leave-type table:

- **Link to Sick Leave**
- **Link to Work from Home**
- **Link to Vacation Leave**

These links are set automatically based on the **Team Member** and **Type**.

## Exceed Allowance (Per Year)

For Sick Leave, Vacation Leave, and Work from Home:

- These fields are **not** lookups.
- Instead, automations **copy the value** from the corresponding yearly table (explained later).
- This preserves the value **as it was at the time of submission**, even if future records change the linked rollups.

### Why not use a Lookup?

Lookups update when new entries are added — but yearly caps must be determined **per submitted request**, not re-calculated forever.

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## Leave Overview — Central Employee Information

Contains:

### Active at Company

Used to filter form dropdowns so only active employees appear.



## Leave Request

Please complete the following form to complete your leave request

Let's start with your name here :

Add some help text

+ Add

Limit record selection to a view

ACTIVE MEMBERS

(i) Record selection will be limited to records from ACTIVE MEMBERS

Show field only when conditions are met

This uniform reference ensures consistent automation behavior.

## Yearly Tables (Sick Leave, Work from Home, Vacation Leave)

Each leave-type table follows the same structure:

- One record per employee per year

- Tracks yearly totals and allowance limits
- Provides exceed-limit values that automations copy into Leave Detail

## Shared Fields Across These Tables

### Link to Leave Detail

Holds all leave requests for the year.

### Record ID (From Leave Detail)

Used to match the correct request when automations sync fields.

### Approved Leave (For This Year)

Rollup: working days where Status = *Approved*.

### Applied Leave (For This Year)

Rollup: working days where Status = *Applied* or *Pending*.

Limitation: Assumes requests are processed one at a time.

### Exceed Leave Allowance (Per Year)

Each table has its own formula:

#### Sick Leave

```
IF({Approved Sick Leave (For This Year)} + {Applied Sick Leave (For This Year)} > 5, "Yes", "No")
```

#### Work from Home

```
IF({Approved Work from Home (For This Year)} + {Applied Work from Home (For This Year)} > 15, "Yes", "No")
```

#### Vacation Leave

```
IF({Approved Vacation Leave (For This Year)} + {Applied Vacation Leave (For This Year)} > 7, "Yes", "No")
```

These values are copied into **Leave Detail** via automation, ensuring each request is evaluated correctly.

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# Automations — How They Control the Flow

## Restart at End of Each Year

Clears links in Sick Leave, Vacation Leave, and Work from Home tables so the next year starts fresh.

## Leave Request Form Submitted

Runs when a new leave request is submitted.

### 1. Per-Event Limit Check

If sick/vacation request exceeds per-event max:

- Status → **Denied**
- Reason (According to Automation) → explains the overage

### 2. Link to Yearly Table

Based on Type:

- Sick Leave → link to Sick Leave table
- Vacation Leave → link to Vacation Leave table
- Work from Home → link to Work from Home table

This establishes the connection required for later cap checks.

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## CAP: Leave Request Form Submitted — PART 1

This automation:

1. Finds the corresponding yearly record.
2. Copies the **Exceed Allowance (Per Year)** value into the **Leave Detail** request.

This ensures each request is judged based on:

- previously approved days
- currently pending requests
- the request being submitted

Not by dynamically shifting rollups.

## CAP: Leave Request Form Submitted — PART 2

Triggered when the copied “Exceed … (Per Year)” field updates.

If any are “Yes”:

- Status → **Denied**
- Reason → indicates yearly limit exceeded.

This is the final authority that blocks requests exceeding annual caps.

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## Summary of System Flow

1. User submits leave form → **Leave Detail**
  2. Automation checks **per-event limit** → possible auto-deny
  3. System links request to correct yearly table
  4. Yearly table rollups determine cumulative totals
  5. Automation copies yearly exceed status to Leave Detail
  6. Automation denies request if yearly cap exceeded
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## End of Document

*Last Updated: 01 December 2025*