

Airtable README - Nellis Leave Management - bespoke v2

This README documents the setup for managing employee leave requests in Airtable. The system enforces rules such as preventing overlapping leaves for employees in the same role and capping leave durations per event and per year. It leverages Airtable's tables, fields, formulas, and automations.

Requirements and Planning

No Two of the Same Role on Leave at the Same Time

Ensure no overlapping approved leaves for employees in the same role.

Possible Solutions

1. Automation Check for Same Role and Period:

- Add an automation "Same Role Same Period" to check for overlaps.
- If overlaps exist, set Status to "Denied".

The screenshot shows the Airtable automation builder interface. A dropdown menu is open under a condition step, specifically for selecting a date range. The menu includes options like 'exact date...', 'one week from now', 'one month ago', 'one month from now', 'number of days ago...', 'number of days from now...', and 'exact date...'. The background shows the automation steps: 'Where Team is Team Name' and 'and Start Date is exact date one week from now'. A red error message at the top states: 'X Conditional fields do not allow overlap checks.' A note below says: 'A condition is incomplete or invalid'.

2. Populate Per-Role Leave Dates:

- On leave entry, populate [Leave per Role](#) with Lapsed Dates (all dates between Start Date and End Date) using a script and automation (no native Airtable formula supports this).

- Use a rollup and formula to determine Role Dates Overlap (Yes/No) for **approved leaves only**.
- Automation (on form submission) checks this field; if "Yes", set Overlaps with Previously Approved (Yes/No) and update Status to "Denied".

X Run Script: Determine if Overlap Present **not evaluating correctly.**

Cap Leave for Various Leave Types

In One Sitting (Per Event)

- When a leave is requested, use a formula "Exceed [Type] Duration (in one sitting)" to check if the duration exceeds limits.
- If exceeded, automation sets Status to "Denied".

Limits:

- Vacation: 7 working days per event (DONE).
- Sick days: 5 working days per event (DONE).

In a Year

- Vacation: 7 working days per year.
- Work from Home: 15 working days per year.
- Sick days: 5 working days per year.

Implementation

Adaptations to Existing Tables

Leave Detail

Alterations

Leave Request (Form)

- Limit selections to employees with [Active at Company](#) status in [Leave Overview](#).

The screenshot shows a form field configuration for a 'Team Member' dropdown. The field is labeled 'Team Member' and is marked as 'Required'. Below the label, there is placeholder text: 'Let's start with your name here : Add some help text'. A button labeled '+ Add' is visible. Underneath the input field, there are two options: 'Limit record selection to a view' (which is selected) and 'Show field only when conditions are met'. The 'Limit record selection to a view' option is set to 'ACTIVE MEMBERS', which is highlighted with a blue border. A tooltip below this option states: 'Record selection will be limited to records from ACTIVE MEMBERS'.

Leave Status

Formula to determine status based on dates:

```
IF(
    IS_BEFORE({Start Date}, TODAY()),
    // if leave start date before today
    IF(
        IS_AFTER({End Date}, TODAY()),
        // if leave end date is after today
        'leave in progress',
        // if leave end date is before today
        'leave taken'
    ),
    // if leave start date after today
    'upcoming leave'
)
```

Reason (According to Automation)

⋮ Sick Leave Duration Exceeded (per event)	×
⋮ Sick Leave Allowance Exceeded (per year)	×
⋮ Leave from Same Roles Overlap	×
⋮ Vacation Leave Duration Exceeded (per event)	×
⋮ Vacation Leave Allowance Exceeded (per year)	×
⋮ Work from Home Allowance Exceeded (per year)	×

New Fields for No Two of the Same Role on Leave at the Same Time

✗ NOT DONE

Role

- Lookup from Leave Overview.

Link to Leave per Role

- Linked to Leave per Role.
- Populated via automation Role: Leave Request Form Submitted.

Lapsed Dates

- List of dates between 'Start Date' and 'End Date'.
- Populated via automation Role: Leave Request Form Submitted.

Record ID

- Airtable record ID for reference in automations.

New Fields for Cap Leave for Various Leave Types

✓ Success

Number of Working Days

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

Exceed Sick Leave Allowance (Per Event)

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

Exceed Vacation Leave Allowance (Per Event)

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

Link to Sick Leave

- Updated with "Team Member" via automation [Sick: Leave Request Form Submitted](#).

Exceed Sick Leave Allowance (Per Year)

- Text field updated via automation [Cap: Leave Request Form Submitted \(PART 1\)](#) (copies value from [Sick Leave > Exceed Sick Leave Allowance \(Per Year\)](#) to preserve historical checks).

Link to Work from Home

- Updated with "Team Member" via automation [Work from Home: Leave Request Form Submitted](#).

Exceed Work from Home Allowance (Per Year)

- Text field updated via automation [Work from Home: Leave Request Form Submitted](#) (copies value from [Work from Home > Exceed Work from Home Allowance \(Per Year\)](#) to preserve historical checks).

Link to Vacation Leave

- Updated with "Team Member" via automation [Vacation: Leave Request Form Submitted](#).

Exceed Vacation Leave Allowance (Per Year)

- Text field updated via automation [Cap: Leave Request Form Submitted \(PART 1\)](#) (copies value from [Vacation Leave > Exceed Vacation Leave Allowance \(Per Year\)](#) to preserve historical checks).

Leave Overview

New Fields

Active at Company

- Checkbox to indicate active employees.

- Used to filter dropdown in [Leave Detail > Leave Request \(Form\)](#) via view ACTIVE MEMBERS

New Fields for [No Two of the Same Role on Leave at the Same Time](#)

X NOT DONE

Role

- Employee's role (e.g., Principal Architect).

New Tables

Sick Leave

- Tracks sick leave per employee per year.

Link to Leave Overview

- Linked for uniformity; ensures automation updates use "Team Member".

Link to Leave Detail

- Links to leave entries.

Record ID (From Leave Detail)

- Lookup from [Leave Detail](#); used in [Cap: Leave Request Form Submitted \(PART 1\)](#).

Approved Sick Leave (For This Year)

- Rollup of [Number of Working Days](#) where Status is "Approved".

Applied Sick Leave (For This Year)

- Rollup of [Number of Working Days](#) where Status is "Applied" or "Pending".
- Limitation: Assumes only the newest entry is pending (processed sequentially).

Exceed Sick Leave Allowance (Per Year)

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

Work from Home

- Tracks work-from-home leave per employee per year.

Link to Leave Overview

- Linked for uniformity.

Link to Leave Detail

- Links to leave entries.

Record ID (From Leave Detail)

- Lookup from [Leave Detail](#).

Approved Work from Home (For This Year)

- Rollup of [Number of Working Days](#) where Status is "Approved".

Applied Work from Home (For This Year)

- Rollup of [Number of Working Days](#) where Status is "Applied" or "Pending".
- Limitation: Assumes sequential processing.

Exceed Work from Home Allowance (Per Year)

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

Vacation Leave

- Tracks vacation leave per employee per year.

Link to Leave Overview

- Linked for uniformity.

Link to Leave Detail

- Links to leave entries.

Record ID (From Leave Detail)

- Lookup from [Leave Detail](#).

Approved Vacation Leave (For This Year)

- Rollup of [Number of Working Days](#) where Status is "Approved".

Applied Vacation Leave (For This Year)

- Rollup of [Number of Working Days](#) where Status is "Applied" or "Pending".
- Limitation: Assumes sequential processing.

Exceed Vacation Leave Allowance (Per Year)

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

Leave per Role

- Roles: Principal Architect and Founder, Associate Architect, Senior Architect, Architect, Technical Architect, Senior Interior Designer, Interior Design Architect, Landscape Architect, Visual Architect, Studio Curator.

Link to Leave Detail

- Linked as Leave Detail .

(Approved) Lapsed Dates

- Rollup of unique Lapsed Dates where Status is "Approved".

```
UNIQUEARRAY(values)
```

- Excludes pending, denied, or cancelled leaves.

Status

Single select

Select one predefined option from a list, or prefill each new cell with a default option.

Options

Color-code options

⋮ <input checked="" type="checkbox"/> Applied	x
⋮ <input checked="" type="checkbox"/> Pending	x
⋮ <input checked="" type="checkbox"/> Approved	x
⋮ <input checked="" type="checkbox"/> Denied	x
⋮ <input checked="" type="checkbox"/> Cancelled	x
<input type="button" value="+ Add option"/>	

(Applied) Lapsed Dates

- Rollup of unique Lapsed Dates where Status is "Applied" or "Pending".

Overlapping Dates

- Formula to check for overlaps:

```
IF(
    AND({(Applied) Lapsed Dates}, {(Approved) Lapsed Dates}),
    IF(
        FIND(
            ARRAYJOIN({(Applied) Lapsed Dates}, ","),
            ARRAYJOIN({(Approved) Lapsed Dates}, ",")
        ),
        "Yes",
        "No"
    ),
    BLANK()
)
```

Leave Detail Record ID

- Lookup of [Record ID](#) from [Leave Detail](#).
- Used in [Role: Leave Request Form Submitted](#).

New Automations

Restart at End of Each Year

- On the last day of the year, clear linked fields in [Sick Leave](#), [Vacation Leave](#), and [Work from Home](#).

For [No Two of the Same Role on Leave at the Same Time](#)

 Failure

Role: Leave Request Form Submitted

Trigger: Form Submitted

- Form "Leave Request" from [Leave Detail](#).

Run Script: Determine Dates Between Start and End Date

Inputs ▾

These let you use values from previous automation triggers and actions. Use in your script with `input.config()`.

[Learn more](#)

Name	<input type="text" value="Start"/>	trash
Value	<input style="border: none; padding: 0; width: 100%; height: 100%; background-color: inherit; color: inherit; border-radius: 10px; font-size: 1em; font-weight: bold; border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;" type="button" value="Start Date"/> +	
Name	<input type="text" value="End"/>	trash
Value	<input style="border: none; padding: 0; width: 100%; height: 100%; background-color: inherit; color: inherit; border-radius: 10px; font-size: 1em; font-weight: bold; border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;" type="button" value="End Date"/> +	
+ Add input variable		

```
// Get all input values in a single call
const config = input.config();
const startDate = config.Start;
const endDate = config.End;

// Convert input strings to Date objects
const start = new Date(startDate);
const end = new Date(endDate);

// Validate dates
if (isNaN(start) || isNaN(end)) {
  throw new Error("Invalid date format. Please use YYYY-MM-DD format.");
}

// Ensure start date is before end date
if (start > end) {
  throw new Error("Start date must be before end date.");
}

const dates = [];
const currentDate = new Date(start);
```

```

// Loop through dates and add to array
while (currentDate <= end) {
    // Format date as YYYY-MM-DD for Airtable compatibility
    const formattedDate = currentDate.toISOString().split('T')[0];
    dates.push(formattedDate);
    currentDate.setDate(currentDate.getDate() + 1);
}

// Set the result as output for Airtable automation
output.set("dates", dates);

```

Update Said Record: Dates and Record Link

- Update [Lapsed Dates](#) with script results.
- Update [Link to Leave per Role](#) with [Role](#) lookup (creates link to [Leave per Role](#)).

Find Records

- Use [Record ID](#) to find the matching record in [Leave per Role](#) (expects one result).

Run Script: Determine if Overlap Present

Inputs ▾

These let you use values from previous automation triggers and actions. Use in your script with `input.config()`.

[Learn more](#)

Name	<input type="text" value="AppliedDates"/> Delete
Value	<input type="button" value="⊕"/> (Applied) Lapsed Dates
Name	<input type="text" value="ApprovedDates"/> Delete
Value	<input type="button" value="⊕"/> (Approved) Lapsed Dates

```

// Get all input values in a single call
const config = input.config();
const appliedDates = config.AppliedDates;
const approvedDates = config.ApprovedDates;

// Check if any date in appliedDates matches any date in approvedDates
const matchFound = appliedDates.some(date => approvedDates.includes(date));

// Set the result as output for Airtable automation
output.set("match", matchFound ? "Yes" : "No");

```

Update Found Record

- Update [Overlapping Dates](#) with script result.

For [Cap Leave for Various Leave Types](#)

Sick: Leave Request Form Submitted

Trigger: Form Submitted

Check Conditions

- If Type is "Sick Leave" and [Exceed Sick Leave Allowance \(Per Event\)](#) is "Yes":
 - Update Status to "Denied".
 - Update [Reason \(According to Automation\)](#) to "Sick Leave Duration Exceeded (per event)".

Check Conditions

- If Type is "Sick Leave":
 - Update [Link to Sick Leave](#) with "Team Member".

Vacation: Leave Request Form Submitted

Trigger: Form Submitted

Check Conditions

- If Type is "Vacation Leave" and [Exceed Vacation Leave Allowance \(Per Event\)](#) is "Yes":
 - Update Status to "Denied".
 - Update [Reason \(According to Automation\)](#) to "Vacation Leave Duration Exceeded (per event)".

Check Conditions

- If `Type` is "Vacation Leave":
 - Update [Link to Vacation Leave](#) with "Team Member".

Cap: Leave Request Form Submitted (PART 1)

Trigger: Form Submitted

Check Condition

- Repeat for each `Type` (Sick, Vacation, Work from Home).

Find Record

- In [Work from Home](#), [Sick Leave](#), or [Vacation Leave](#) matching the new entry via [Record ID](#).

Update Record

- Copy exceed value to [Leave Detail](#) (e.g., [Exceed Work from Home Allowance \(Per Year\)](#) from [Work from Home > Exceed Work from Home Allowance \(Per Year\)](#)).

INSTEAD OF LOOKUP VALUE

which will change outcome when any new record is linked

WANT it to be determined if exceeds given type of leave for newest request (record) only

Cap: Leave Request Form Submitted (PART 2)

Trigger: Fields Updated

- Watches [Exceed Work from Home Allowance \(Per Year\)](#), [Exceed Sick Leave Allowance \(Per Year\)](#), [Exceed Vacation Leave Allowance \(Per Year\)](#).

Check Conditions

- If any is "Yes":
 - Update `Status` to "Denied".
 - Update [Reason \(According to Automation\)](#) accordingly.

Start Over at Year End

- On last day of year, clear [Link to Sick Leave](#), [Link to Work from Home](#), and [Link to Vacation Leave](#) in [Leave Detail](#).

End of Document

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