Airtable README Maintenance & Setup Guide - Leave Management for v2 & v3

PART 1 – WHAT YOU NEED TO KNOW BEFORE TOUCHING THE BASE

Approval Notification System – How Slack Knows Who to Message

The base can notify approvers in four different ways. The system follows a **strict priority order** – the highest active option always wins.

Priority order (highest → lowest):

1. **Individual level**
   On the employee's record in *Team Members Information*, tick `Message Approver directly on Slack` **and** fill in the field `Slack Email of Approver – by Individual`.
   Then activate **either** of these two automations:
   - **2nd LR - via Interface by Category, Team or Individual in private**
   - **2nd LR - via Slack by Category, Team or Individual in private**

2. **Category / Group level**
   In the relevant row of the *Leave Structure* table, tick `Message Approver directly on Slack` must be ticked and the field `Slack Email of Approver – by Category` must be filled.
   The same two automations as above must be active.

3. **Team level**
   In the relevant row of the *Teams' Structure* table, tick `Message Approver directly on Slack` and fill `Slack Email of Approver – by Team`.
   Again, the same two automations must be active.

Slack Email of Approver
(formula field that chooses the correct email according to the priority above)

```
IF(
  {Message Approver directly on Slack} = TRUE(),
    {Slack Email of Approver – by Individual},
  IF(
    {Slack Email of Approver – by Category},
      {Slack Email of Approver – by Category},
      {Slack Email of Approver – by Team}
```

```
    )
  )
```

5. **Channel only (no direct message)**
   Simply activate one of the channel-based automations:
   - **2nd LR - via Slack by Team on channel**
   - **2nd LR - via Slack by Category Name on channel**

Total Leave Available

This is the total number of days an employee may still take.

> ✏️ **Alternatively use** `Total Leave Available (alternative)`
>
> where leave "entitled to" for current period (`Entitled Leave for Current Period`) and that which has been taken (`Leave Taken for Current Period`) is split up **instead of** being calculated together as in `Leave Available for Current Period`

> ⚡ **there are slight variations in the formulas based on version but serve same purpose**

> 💧 **unlimited categories (e.g. "Doctors") should be excluded from the first rollup with a condition, otherwise** `Total Leave Available` **would otherwise become huge because** `Number of Days Leave per Year` **= 365**

| | Hide fields | ≡ Filter | ⊞ Group | ↓↑ Sort | ◇ Color | ≡| |

◎ Leave Accumulated over Previous ⓘ ⌄   *f_x* Total Leave   ⓘ   ✉ Calendar Email
Periods   Available

Leave Accumulated over Previous Periods

◎ Rollup   ⌄

Summarize data from linked records. Learn more

Rollup   Formatting

⊟ Accumulated Leave   ⌄

Accumulated Leave field you want to roll up

Historic Leave Available   ⌄

🟢 Only include linked records from the **Accumulated Leave** table that meet certain conditions

Where   Category ⌄   has none of ⌄   Doctor   ⌄   🗑 ⠿

    + Add condition   + Add condition group   ⓘ

Aggregation formula which rolls up the values in each linked record

```
SUM(values)
```

Description

for Non-Doctors

Sum 0.0   Sum 1946.0   Cancel   **Save**

Duration of Leave Request

(excludes weekends and public holidays)

```
IF(
  {Half-Day} = TRUE(),
    0.5,
  IF(
    {Leave Start Date} = {True Leave End Date},
      1.0,
    WORKDAY_DIFF({Leave Start Date}, {True Leave End Date}, {Public Holidays})
  )
)
```

Current Period & Rollover Logic

Every employee has two calculated fields:

- `Current Period Start Date`
- `Current Period End Date`

These dates are determined by the settings in the *Leave Structure* table.

> ### ⓘ **Info**
>
> - **Group A** → `According to Calendar Year` = **No** → period starts on the employee anniversary
> - **Group B** → `According to Calendar Year` = **Yes** → period starts 1 January

On the exact **end date** of a period the field `Due for Restart and Rollover` becomes "Yes" which triggers [Roll Over and Restart](#)

Result
A new record in *Accumulated Leave* with (now) previous periods *Team Members Information* `Leave Available for Period`
so that the rollup in *Team Members Information* `Leave Accumulated over Previous Periods` includes (now) previous periods' values

This ensures unused leave from (now) previous period is taken into account for the `Total Leave Available` (or `Total Leave Available (alternative)` without manual intervention

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PART 2 – SETUP BEFORE DEPLOYMENT

everything in this section is mandatory before any employee uses the system

Step 0 – Public Holidays

Import or generate South African public holidays for the current year + the next 2 years (minimum).

Launch   Share

Tools ∨

👁 Hide fields   ≡ Filter   ▦ Group   ↕ Sort   🎨 Color   ≡ᴵ   ↗ Share and sync   🔍

	# Public Holidays Year	🔤 AI-Generated List of Dates
1	2025	'2025-01-01', '2025-03-21', '2025-04-18', '2025-04-21', '2025-04-27', '2025-05-01', '2025-06-16', '2025-08-09', '2025-09-24', '2025-12-16', '2025-12-25', '2025-12-26'
2	2026	'2026-01-01','2026-03-21','2026-04-03','2026-04-06','2026-04-27','2026-05-01','2026-06-16','2026-08-10','2026-09-24','2026-12-16','2026-12-25','2026-12-26'
3	2027	'2027-01-01','2027-03-21','2027-03-22','2027-04-02','2027-04-05','2027-04-27','2027-05-01','2027-06-16','2027-08-09','2027-09-24','2027-12-16','2027-12-25','2027-12-26'
4	2028	'2028-01-01','2028-03-21','2028-04-14','2028-04-17','2028-04-27','2028-05-01','2028-06-16','2028-08-09','2028-09-24','2028-12-16','2028-12-25','2028-12-26'
5	2029	'2029-01-01','2029-03-21','2029-04-06','2029-04-09','2029-04-27','2029-05-01','2029-06-16','2029-08-09','2029-09-24','2029-12-16','2029-12-25','2029-12-26'
6	2030	'2030-01-01','2030-03-21','2030-04-18','2030-04-21','2030-04-22','2030-05-01','2030-06-16','2030-06-17','2030-08-09','2030-09-24','2030-12-16','2030-12-25','2030-12-26'
7	2031	'2031-01-01','2031-03-21','2031-04-18','2031-04-21','2031-04-27','2031-05-01','2031-06-16','2031-08-09','2031-09-24','2031-12-16','2031-12-25','2031-12-26'
+		

Step 1 – Teams' Structure table

1. Create one row for every team in the organisation (field `Team` = single-select).
2. (Optional) Fill `Slack Email of Approver – by Team` if you want team-level direct messaging.
3. Tick `Message Approver directly on Slack` only for teams that should receive private messages.

Slack Email of...   Team Members Email

Slack Email of Approver - by Team

Lookup

See values from a field in a linked record.

Configuration   Formatting

Select lookup source

Team Identifier

Teams' Structure field you want to look up

Slack Email of Approver - by Team

Only include linked records from the **Teams' Structure** table that meet certain conditions

Where   Message App...   is   ✓   🗑   ⠿

+ Add condition   + Add condition group   ?

Sort records

Limit the number of items shown

+ Add description   Cancel   **Save**

🖊 **The locked view "IN USE" determines which teams appear in the Create Team Member form dropdown.**
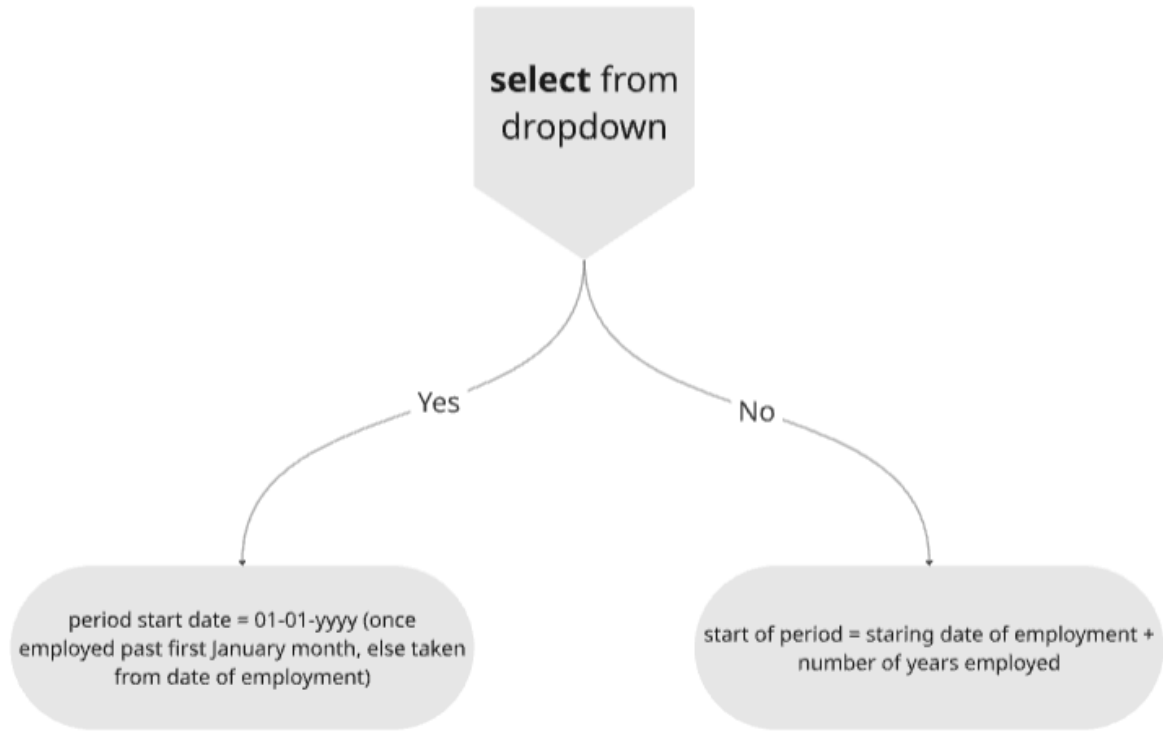
Step 2 – Leave Structure table

1. Create one row (a "Group") for **every unique combination** of leave rules that exists in your organisation.
   Each row defines a complete leave policy.
2. Fill the following fields in each row:
   - `Category` – e.g. "Approval Required", "Directly Approved", "Doctor", "Nurse", "Admin"
   - `Number of Days Leave per Year` – e.g. 21, 15, or 365 (for unlimited categories)

- `Accrual Basis` — tick Yes or No

Accrual Basis

select from dropdown

Yes → leave attributed to staff member as he/she works ie. based on number of days since start of period

No → number of dyas leave given for period attributed to staff memeber at start of period (in full)
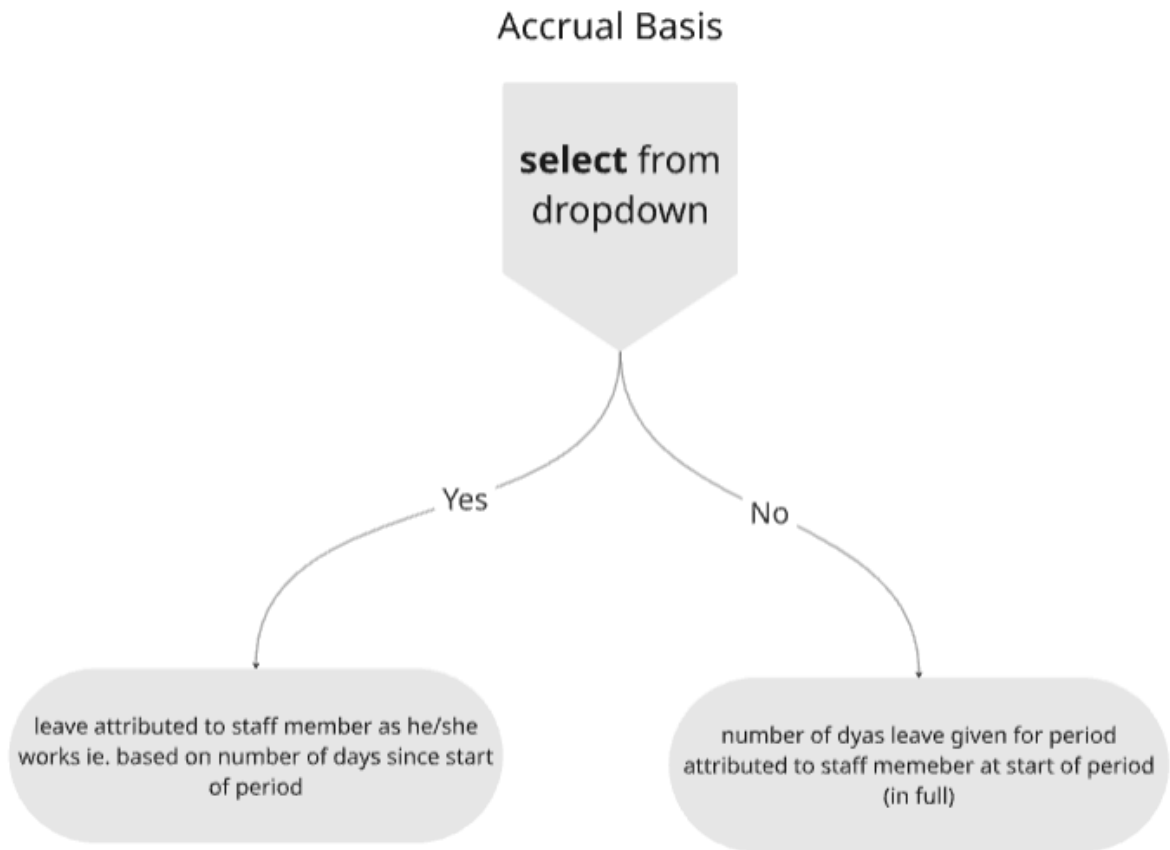
- `According to Calendar Year` — tick Yes (period = 1 Jan – 31 Dec) or No (period = anniversary-based)

According to Calendar Year

select from dropdown

Yes

period start date = 01-01-yyyy (once employed past first January month, else taken from date of employment)

No

start of period = staring date of employment + number of years employed

3. (Optional – only if you want **category-level** direct Slack approvals)
   - Fill `Slack Email of Approver - by Category`

- Tick the checkbox `Message Approver directly on Slack`

Slack Email of Approver - by Category	Number of Days Leave per Period	According to Calendar Year	Ac

Slack Email of Approver - by Category

Slack Email of Approver - by Category

Lookup ⌄

See values from a field in a linked record.

Configuration   Formatting

Select lookup source

Category Name ⌄

Leave Structure field you want to look up

✉ Slack Email of Approver - by Category ⌄

🔵 Only include linked records from the **Leave Structure** table that meet certain conditions

Where | Message App... ⌄ | is | ✓ | 🗑 | ⠿

+ Add condition   + Add condition group   ⓘ

Sort records

Limit the number of items shown

+ Add description   Cancel   **Save**

No
No
No
No
No
No
No
No
No
No
No
No
No
No
No

ⓘ **The locked view "IN USE" controls which Groups appear in the Create Team Member form.**

Step 3 – Automations – Choose Exactly One of Each

Under each automation section, you must activate **exactly one** automation from each numbered group (1st LR, 2nd LR, 3rd LR, etc.).
Which one you choose depends entirely on how you want leave requests to be submitted, how approvers should be notified, and which calendar system you use.

"Leave Requested" Section

1st LR – Populate Public Holidays

Purpose: As soon as a leave request is submitted (whether via form or directly into a view), this automation links the correct year(s) from the *Public Holidays* table to the new request record. This allows the `WORKDAY_DIFF` formula to correctly exclude public holidays when calculating `Duration of Leave`.

Choose exactly one of the following:

- **1st LR (via form)** → triggers when someone submits the Leave Application form
- **1st LR (via view)** → triggers when a record is created or edited directly in a specific grid view

2nd LR – Notify the Approver

Purpose: Immediately inform the relevant approver(s) that a new leave request needs attention.

This automation only fires for employees whose *Leave Structure* Category is set to "Approval Required" (or whatever you named the category that actually needs approval — e.g. admin/nurses in a doctor's practice). Categories like "Directly Approved" or "Doctor" skip this step entirely.

Choose exactly one of the following four options:

- **2nd LR – via Slack by Team on channel**
  Posts a message to a specific Slack channel. The message is routed to the correct team channel based on the requester's team. Approvers can click Approve or Reject directly inside Slack.
- **2nd LR – via Slack by Category Name on channel**
  Same as above, but the message is routed to a channel based on the requester's Category.
- **2nd LR – via Interface by Category, Team or Individual in private**
  Sends a private Slack message (or email if needed) to the specific approver (determined by Individual → Category → Team priority). The message contains a direct link to the Airtable Interface where the approver must click Approve or Reject.
- **2nd LR – via Slack by Category, Team or Individual in private**
  Sends a private, actionable Slack message with Approve / Reject buttons. No need to open Airtable — the approver can decide directly in Slack.

3rd LR – Create Calendar Event

Purpose: Once a leave request is approved, automatically create an all-day (or half-day-aware) calendar invitation for the entire team.

Choose exactly one:

- **3rd LR – no half day – Outlook**
- **3rd LR – no half day – Gmail**

"Leave Cancelled" Section

1st LC – Remove or Update Calendar Event

Purpose: When an approved leave is cancelled, retract or modify the previously sent calendar invitation.

Choose exactly one:

- **1st LC – Microsoft Outlook**

- **1st LC – Google**

"Other" Section

(always leave these active)

Zero Leave Request

If someone accidentally submits a leave request with a calculated duration of 0 days, this automation sends them a friendly Slack message explaining the mistake.

Roll Over and Restart

On the exact period end date this automation moves any remaining `Leave Available for Period` into a new *Accumulated Leave* record which is then rolled up in *Team Members Information* `Leave Accumulated over Previous Periods`

> NOTE: will only be nonzero after first roll over after being onboarded on system

Step 4 – Onboard Every Employee

When adding an employee via the **Create Team Member** form you must provide:

`Team`

`Group`

`Slack Email of Approver – by Individual`
If this is the chosen method of communication; *refer to* *1.1 Approval Notification System – How Slack Knows Who to Message* *for more information*

`Previously Accumulated Leave`
Leave accumulated thus far for period PRIOR TO current period
ie. if working according to calendar basis and form completed in March, input leave accumulated up to 1st January of same year

> ⚡ **All leave** taken in the current period **before** onboarding must be back-dated (submitted and approved via the form) **before** final go-live, otherwise balances will be wrong.

> ☰ **Example**
>
> - work according to calendar year
> - system onboarding March

Required Data

each leave period taken from 1st of January (start of new period) till March (onboarding date) will have to be submitted via form & approved *BEFORE final deployment* (so that these approval request not sent to users)

🔥 v3 improvement

`Total Leave Taken for Current Period (prior to onboarding)`

Leave taken in this current period (before onboarding onto system)
which is used to subtract from leave available so that not necessary to input all prior leave within this period for calculation to reflect true value

`Total Leave Accumulated in Previous Period(s) (prior to onboarding)`

Leave accumulated thus far for period PRIOR TO current period
ie. if working according to calendar basis and form completed in March, input leave accumulated up to 1st January of same year

`Leave Balance (upon onboarding)`

Difference of above

☰ Example

- work according to calendar year
- system onboarding March

Required Data

- amount of leave member x is entitled to as of 1st of January for Total Leave Accumulated in Previous Period(s) (prior to onboarding)
- amount of leave taken from 1st of January (start of new period) till March (onboarding date) for Total Leave Taken for Current Period (prior to onboarding)

PART 3 – HOW TO USE AFTER DEPLOYMENT

Adding a New Employee (ongoing)

Always use the form **Create Team Member**.

Never create records manually – historic leave and automations will not run.

Requesting Leave

1. Open form **Leave Application**.
2. Only active employees appear (view "ACTIVE MEMBERS").

3. Select dates, tick half-day if needed, add notes/attachments.
4. Submit → 1st LR attaches holidays → 2nd LR notifies the correct approver instantly.

Approving or Rejecting

Depends on your 2nd LR choice:

- Slack actionable message → click Approve / Reject directly in Slack
- Private message + Interface → approver opens Airtable Interface

When Leave Is Approved

- Requester receives a private Slack message with the Request ID (needed for cancellation)
- Team channel receives "X is on leave from … to …"
- Calendar event is created for the whole team (3rd LR)

Cancelling Approved Leave

1. Open form **Cancel Approved Leave**.
2. Dropdown only shows approved, non-cancelled requests still in the current period.

3. Submit → calendar event is removed/updated (1st LC)

Year-End / Anniversary Rollover

Fully automatic on the exact period end date:

- Remaining balance of `Leave Available for Current Period` → new *Accumulated Leave* record

⚠️ **cannot** use `Accrued Leave for Current Period` since this does **not** subtract the leave taken for current period and therefore will 'transfer over' the full `Number of Days Leave per Year` to *Accumulated Leave*

- All current-period requests flipped to "Include in Current Period" = No
- Employee's new balance appears instantly

⚡ **some leave requests for next period will have to be manuallly reset to** `Include in Current Period` **= "Yes"** **after** **automation has run**

refer to [Manually Fix "Included in Period"](#)

Maintaining Teams & Groups

To retire a team or leave group from the dropdowns:

- Go to the manual "IN USE" views in *Teams' Structure* or *Leave Structure*
- Set `In Use` = No

Troubleshooting Checklist

- Duration wrong → check `Public Holidays Year(s)` is populated (1st LR ran)
- No Slack notification → verify final `Slack Email of Approver` formula + the three `Message Approver directly on Slack` checkboxes
- Balance didn't roll over → confirm Roll Over and Restart automation ran on the correct date

Special Client Deviation – Move Orthopaedics

They enter the **first day back** as the leave end date, therefore:

- Extra automation **"Update True Leave End Date"** subtracts 1 day
- Duration formula also subtracts an extra day

⚠️ **Warning**

For every other client, **remove** the "-1 day" parts from both the automation and the `Duration of Leave` formula.

End of Document

Last Updated: 28 November 2025