

README - Leave Management - v3

This Airtable base automates leave management, including [Team Structure](#), leave entitlements, [Leave Requests](#), 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 Structure](#) Management:** Create and manage teams using forms.
- **[Leave Structure](#):** Define leave groups, categories, entitlements, accruals, and approval processes.
- **[Team Members Information](#) Management:** Assign employees to teams and leave categories; track [Active](#) status and [Years of Employment](#).
- **Leave Calculation:** Automatically compute [Leave Available for Current Period](#) based on [Years of Employment](#), [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 Holidays](#) Awareness:** [Duration of Leave](#) excludes weekends and AI-fetched [Public Holidays](#).
- **Rollover Automation:** Unused leave rolls over to the next period via [Due for Restart](#).
- **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](#) for assigning employees to teams; used for grouped [Leave Requests](#) views.

Note: Must be set up for each organization before deployment.

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.

In Use

(v3)

- **Type:** Single Select
defaults "Yes"
- **Description:** Determines if team appear in [Create Team Member](#) form dropdowns (only active shown)
accomplished with setting in form to display only entries from (locked view) filtered to `In Use = Yes`

Message Approver Directly on Slack

- **Type:** Checkbox
- **Description:** Enables direct Slack notifications to approvers when checked
used in rollup in [Slack Email of Approver - by Team](#)

Leave Structure

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

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

Note: Must be set up for each organization before deployment.

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"). Defaults to "Approval Required" or "Directly Approved."
- Note:** May require setup.

In Use

(v3)

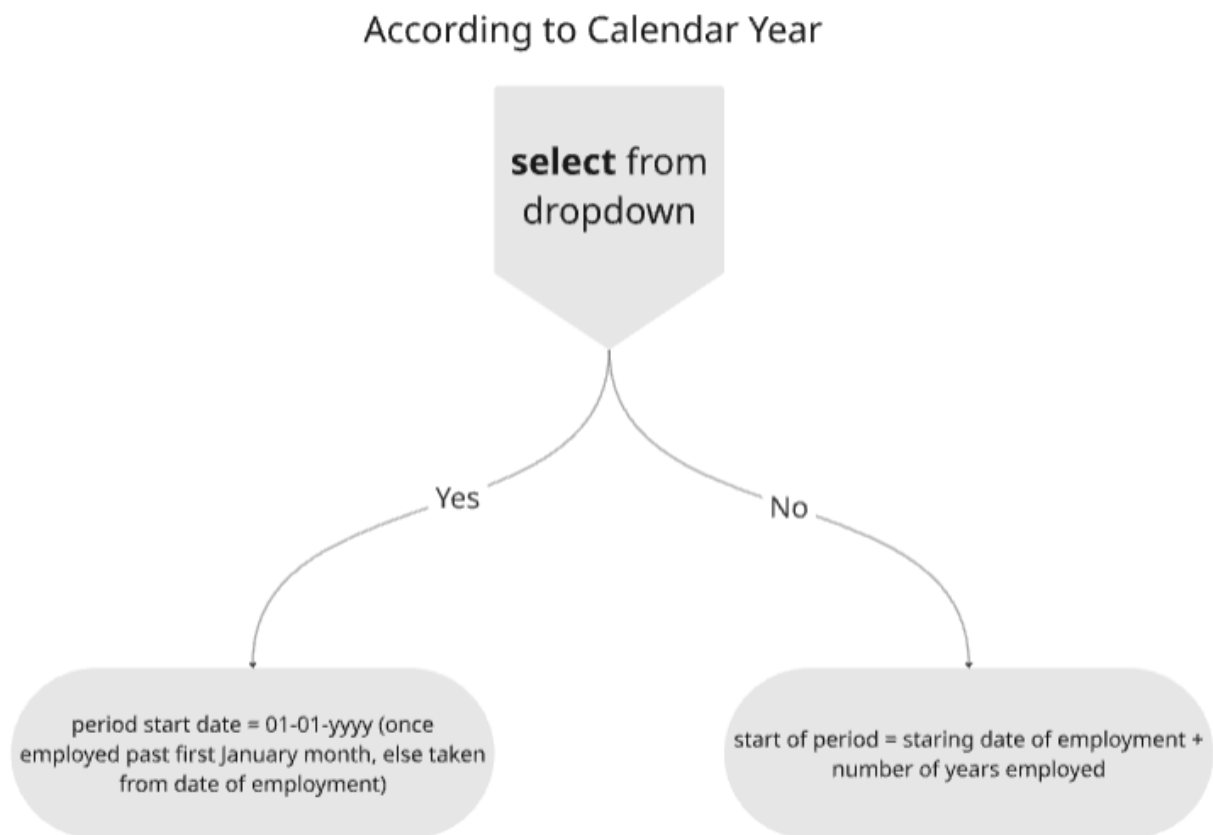
- **Type:** Single Select
defaults "Yes"
- **Description:** Determines if group name appear in [Create Team Member](#) form dropdowns (only active shown)
accomplished with setting in form to display only entries from (locked view) filtered to In Use = Yes

Number of Days Leave

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

According to Calendar Year

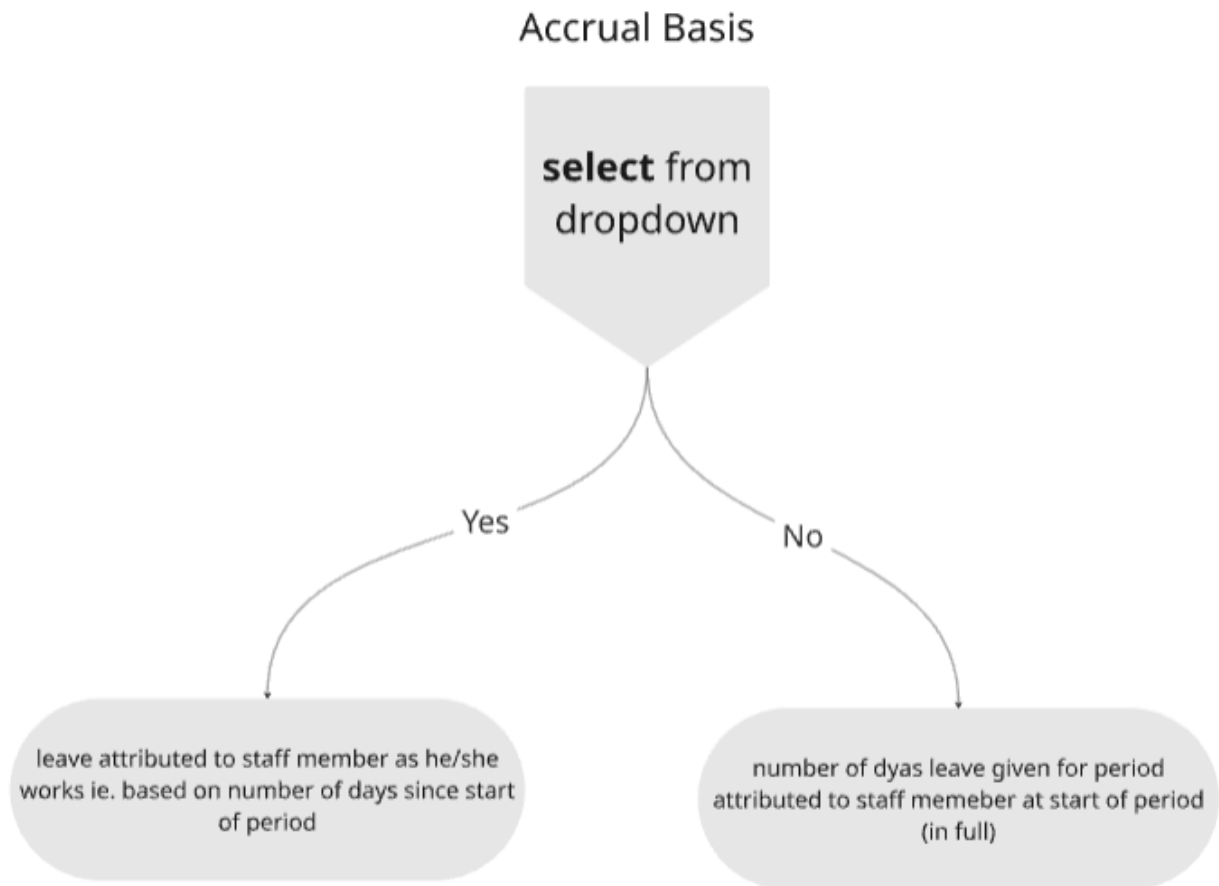
- **Type:** Single Select
- **Description:** Indicates if leave periods align with the calendar year (Jan 1–Dec 31).



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.
used in rollup in [Slack Email of Approver - by Category](#)

Note: Create groups to cover all combinations of approval requirements, leave days, [According to Calendar Year](#), and [Accrual Basis](#).

Team Members Information

Purpose: Tracks employee details and leave entitlements.

Links To: [Leave Requests](#) for linking leave requests to employees; [Accumulated Leave](#) for leave accumulation records.

Team

- **Type:** Link to [Team Structure](#)
(may define approval flow - conditions on automations)

REQUIRED

Team ()

- **Type:** Lookup from [Team](#) from [Team Structure](#)
- **Description:** Required for automation (to set conditions)

Category

- **Type:** Link to [Leave Structure](#)
(defines formula for [Leave Available for Period](#))

REQUIRED

Active

- **Type:** Single Select
defaults "Yes"
- **Description:** Determines if employee IDs appear in [Leave Application](#) form dropdowns
(only active employees shown)
accomplished with setting in form to display only entries from (locked view) filtered to
`Active = Yes`

Years of Employment

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

Formula:

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

Subtracts [Employment Start Date](#) from the current date to compute years employed, used in [Leave Available for Current Period](#) and [Current Period Start & End Date](#)

Employment Start This Year

- **Type:** Formula
- **Description:** Determines if employee started this year for leave entitlement.

Formula:

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

Used in [Leave Available for Current Period](#).

Current Period Start & End Date

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

Formulas:

- **Start:**

```
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")
)
```

- **End:**

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

Sets period start to Jan 1 (if [According to Calendar Year](#)) or [Employment Start Date](#) plus [Years of Employment](#); end is one year from start.

Due for Restart

- **Type:** Formula
- **Description:** Triggers leave rollover.

Formula:

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

Checks if today matches [Current Period Start & End Date](#) end to initiate rollover.

Total Leave Taken for Current Period (prior to onboarding)

- **Description:** Leave taken in this current period (before onboarding onto system) - used to subtract from leave available so that not necessary to input all prior leave within this period for calculation to reflect true value
used to populate [Historic Leave Available](#) in [Accumulated Leave](#) with "Accumulation Type" as From Initial Setup via automation [New Team Member \(via form\)](#) using [Leave Balance \(upon onboarding\)](#)
- **Formatting:** 2 decimal places and allowing negative numbers

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
```

⚠ **CRITICAL FOR THIS NOT TO INCLUDE ANY LEAVE ACQUIRED FOR CURRENT PERIOD (ie. period in which onboarding is taking place)**

the leave each individual is entitled to for current period will be calculated by [Leave Available for Current Period](#)

- **Type:** Number
- **Description:** Manually entered leave accumulated before the current period (in which members onboarded).
used to populate [Historic Leave Available](#) in [Accumulated Leave](#) with "Accumulation Type" as From Initial Setup via automation [New Team Member \(via form\)](#) using [Leave Balance \(upon onboarding\)](#).
- **Formatting:** 2 decimal places and allowing negative numbers

☰ Example

Facts

- work according to calendar year
- system onboarding March

Required Data

assuming [According to Calendar Year](#) = "Yes"

- 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 \(prior to onboarding\)](#)

Leave Balance (upon onboarding)

NOTE: this is likely to be negative but is corrected for in [Leave Available for Current Period](#) moving into [Total Leave Available](#)

```
{Total Leave Accumulated in Previous Period(s) (prior to onboarding)} -  
{Total Leave Taken for Current Period (prior to onboarding)}
```

- **Formatting:** 2 decimal places

Leave Available for Current Period

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

Formula:

```
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 [According to Calendar Year](#): Prorates leave for new employees ([Employment Start This Year](#)) or calculates accrued/full entitlement minus [Leave Taken for Period](#).
- Otherwise, uses [Current Period Start & End Date](#) for accrual or full entitlement.

Leave Taken for Current Period

- **Type:** Rollup
- **Description:** Aggregates approved, non-canceled leave from [Leave Requests](#) within the current period.

Leave Entitlement (upon onboarding)

- **Type:** Conditional Rollup
- **Description:** Sums leave from [Accumulated Leave](#) (provided "From Initial Setup") **populated by** automation [New Team Member \(via form\)](#) using form fields [Total Leave Taken for Current Period \(prior to onboarding\)](#) and [Total Leave Accumulated in Previous](#)

[Period\(s\) \(prior to onboarding\)](#)

Rollup Formatting

Select rollup source

⌵ 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 Accumulation... ⌵ is ⌵ From Initial Setup ⌵  

+ Add condition + Add condition group ?

☐ Sort records before summarizing

Aggregation formula which rolls up the values in each linked record

SUM(values)

ⓘ NOTICE: somewhat redundant - can just as well use [Leave Entitlement \(prior to onboarding\)](#) directly since this is single entry and remains fixed (no roll up required)

BUT: may be useful in [Accumulated Leave](#) to get correct summation values in and when required for given member

HOWEVER: if decide to deprecate

☐ update formula in in [Total Leave Available](#)

{Leave Accumulated over Previous Periods} + {Leave Balance (upon onboarding)} + {Leave Available for Current Period}

- ☐ remove [Accumulation Type](#) from [Accumulated Leave](#)
- ☐ turn off automation [New Team Member \(via form\)](#)
- ☐ simplify roll up of [Leave Accumulated over Previous Periods](#) (no condition)
- ☐ delete field [Leave Entitlement \(prior to onboarding\)](#)

Leave Accumulated over Previous Periods

- **Type: Conditional Rollup**

- **Description:** Sums leave from [Accumulated Leave](#) (provided "From Previous Periods" ie. using this system ie. post onboarding) **populated by** automation [Roll Over and Restart](#) using field [Total Leave Available](#)
Note: Conditions can exclude certain [Category](#) or [Team](#).

Rollup

Formatting

Select rollup source

⌵

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

Accumulatio...

⌵

is

⌵

From Previous Period

⌵

🗑️

⋮

+ Add condition

+ Add condition group

?

☐ Sort records before summarizing

Aggregation formula which rolls up the values in each linked record

SUM(values)

Total Leave Available

[Leave Taken for Current Period](#) already accounted for in [Leave Available for Current Period](#)

```
{Leave Accumulated over Previous Periods} + {Leave Entitlement (prior to onboarding)} + {Leave Available for Current Period}
```

⚠️ **use "Create Team Member" form so that automation [New Team Member \(via form\)](#) triggered**

*otherwise **manual correction** required in [Accumulated Leave](#) table*

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

🔍 Group

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

Slack Email of Approver - by Team

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

Slack Email of Approver

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

Formula:

```
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}))
```

Enables organization to move between approval structures (ie. on team, group or individual level) by simply ticking Message Approver Directly on Slack where appropriate.

NOTICE: [Slack Email of Approver - by Category](#) only populated if** [Leave Structure > Message Approver Directly on Slack](#) is ticked (since rollup in [Team Structure](#) conditional) therefore only return email corresponding to correct level

Accumulated Leave

Purpose: Tracks carried-over and available leave.

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

Accumulation Type

- **Type:** Single Select
- **Description:** Specifies how leave is accumulated (e.g., rollover or initial).

Historic Leave Available

- **Type:** Number
- **Description:** Populated by "New Team Member" or "Restart and Roll Over" automations based on [Accumulation Type](#).
Warning: Requires form submission for automations; manual updates needed if bypassed.
- **Formatting:** 2 decimal places and allowing negative numbers

Public Holidays

Purpose: Stores South African public holidays for accurate [Duration of Leave](#) calculations.

Links To: [Leave Requests](#) 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:

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

Links to [Leave Requests > Year Leave Start and End Date](#).

Note: Requires manual updates 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](#) for employee data; [Public Holidays](#) for holiday-aware [Duration of Leave](#).

Employee ID

- **Type:** Single Select

- **Description:** Limited to [Active](#) employees from [Team Members Information](#).

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 content area contains the text 'Lets start with your ID number' and 'Add some help text' with a '+ Add' button. A light blue shaded section below contains a toggle switch for 'Limit record selection to a view', which is also turned on. Under this toggle is a dropdown menu currently showing 'ACTIVE (NON TEST) MEMBERS'. Below the dropdown, a small information box 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.

Formulas:

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

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

Links to [Public Holidays > Year](#) for holiday calculations.

Public Holidays Year

- **Type:** Linked Record
- **Description:** Populated via "1st LR" automation to link holidays for [Duration of Leave](#).

Duration of Leave

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

Formula:

```
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 excluding weekends and [Public Holidays](#).

Warning: "1st LR" automation requires form submission; manual linking needed otherwise.

Amend Leave Requests

Purpose: Handles cancellations of approved leave.

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

Leave Record ID

- **Type:** Single Select

- **Description:** Limited to approved, non-canceled, current-period leave from [Leave Requests](#)

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 / Usage Instructions

Backend Setup

1. [Team Structure](#): Populate teams for form dropdowns.
2. [Leave Structure](#): Define leave groups, [Category](#), and [Number of Days Leave](#).
3. [Team Members Information](#): Add employees, link to [Team/Category](#), set [Active](#) status.

define [Team Structure](#)

1. specify dropdown names for Team
2. populate according to business requirements

define [Leave Structure](#)

3. specify dropdown names for Categories (can also config to duplicate name thereof as primary field similar to [Team Structure](#)) but recommended to leave as is and generate various groups
4. populate according to business requirements

choose desired approval flow

ie. activate **appropriate** automations

- ☐ 1st LR
select one
- ☐ 2nd LR
select one
- ☐ 3rd LR
select one
- ☐ 1st LC
select one

activate supporting automations

Zero Leave Request

Roll Over and Restart

TRIGGER

▶

When a record matches conditions

If Due for Restart and Rollover is "Yes" and C...

ACTIONS

▶ Test step

+

Create record

In Accumulated Leave

Repeat for each in

Leave Database Record Number

Update a record

✎

Update record

Include in Current Period

TRIGGER

▶

When a record matches conditions

If Due for Restart and Rollover is "Yes" and C...

ACTIONS

▶

+

Create record

In Accumulated Leave

Repeat for each in

Leave Database Record Number

Update a record

✎

Update record

Include in Current Period

▶ Test step

ACTION DETAILS

Action type

+ Create record

LABELS

Description

Enter a description

CONFIGURATION

Action will run...

Always

* Table

Accumulated Leave

* Fields

South African ID Number

Choose record(s) to link to, by entering record IDs or names

South African ID Number

Leave Available for Period

Accumulation Type

From Previous Period

+ Choose field

ACTION DETAILS

Action type

✎ Update record

LABELS

Description

Enter a description

CONFIGURATION

Action will run...

Always

* Table

Leave Requests

* Record ID

ID of the record to update. To update a record from a previous step, use the + menu to choose the step and its Record ID. Must correspond to the selected table.

Airtable record ID

* Fields

Include in Current Period

No

+ Choose field

TEST STEP

New Team Member (via form)

The screenshot displays a workflow builder interface. On the left, a vertical timeline shows a 'TRIGGER' step labeled 'When a form is submitted' with a sub-label 'Create Team Member'. Below it is an 'ACTIONS' section with a 'Test step' button and a 'Create record' action labeled 'In Accumulated Leave'. A dashed box below the actions contains the text '+ Add advanced logic or action'. On the right, a 'CONFIGURATION' panel is visible. It includes a section 'Action will run...' with the value 'Always'. Below this is a 'Table' dropdown set to 'Accumulated Leave'. Under the 'Fields' section, there is a 'South African ID Number' field with a dropdown menu showing '# South African ID Number'. Below that is an 'Accumulation Type' dropdown set to 'From Initial Setup'. At the bottom, there is a 'Historic Leave Available' field with a dropdown menu showing 'Leave Balance (upon onboarding)'. A '+ Choose field' link is at the bottom of the configuration panel.

add employees in [Team Members Information](#)

5. distribute to all user as to populate table using

use form: **Create Team Member**

(v3)

Team Identifier

Required

Team

Add some help text

+ Add

☒ Limit record selection to a view

IN USE

Record selection will be limited to records from IN USE

☐ Show field only when conditions are met

Group

Required

Category

Add some help text

+ Add

☒ Limit record selection to a view

IN USE

Record selection will be limited to records from IN USE

☐ Show field only when conditions are met

Apply for Leave

1. Select [Employee ID](#) (active only).
2. Choose leave [Category](#).
3. Specify [Leave Requests > Year Leave Start and End Date](#) and half-day option.
4. Add notes/documents.
5. Submit.

submit requests via forms

Leave Application

Leave Application

Please complete the following form to complete your leave request

South African ID Number Required

Lets start with your ID number

Add some help text

+ Add

☒ Limit record selection to a view

ACTIVE (NON TEST) MEMBERS

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

☐ Show field only when conditions are met

1. **Approvals:** Approvers review and approve/reject; notifications (or actionable message) sent via Slack.
2. **Calculations:** [Leave Available for Current Period](#) updates automatically.
3. **Rollover:** Unused leave rolls over via [Due for Restart](#).

Approval Process

- Approvers review [Leave Requests](#) and approve/reject.
- Notifications sent via Slack ([Slack Email of Approver](#)).
- Approved [Leave Requests](#) trigger notifications and calendar updates.
- Rejected requests send rejection messages.

if via Interface

- **Approved View:** Displays approved, non-canceled [Leave Requests](#), color-coded by [Team](#).
- **Undecided View:** Shows pending [Leave Requests](#), dulled colors for overlaps (links to [Leave per Role > Overlapping Dates](#)), grouped by [Team](#).

if via Actionable Slack Message

Leave Cancellation Process

- Updates calendar events to remove attendees except the requester via [Amend Leave Requests](#).

Form Dependencies

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