How to Set Up v3 Airtable Leave Management

using Plato as example

EXCEL	Start Date	Available from Previous Cycle	Taken			Balance
AIRTABLE	`Plato Start Date`	`Total Leave Accumulated in Previous Period(s) (prior to onboarding)`	`Total Leave Taken for Current Period (prior to onboarding)`	`Entitled Leave for Current Period`	`Leave Taken for Current Period`	`Total Le Available (alterna`
				calculated on accrual basis from `Current Period Start Date`	what has been submitted approved on Airtable since launch	
		A	B	C	D	A - B + C -

> ✏️ **if compnay does NOT work on accrual basis then** `Entitled Leave for Current Period` **full amount given given**

> ☰ **Example**

Gouws, Neil Leon
Date 2023-05-30
THEFORE (since leave entitlement given at end of month)
`Plato Start Date` 2023-05-01
therefore this years `Current Period Start Date` on 2025-05-01

> 👆 `Current Period Start Date` **=** `Plato Start Date` **+ x years**

since Plato does not work according to calendar year

FROM EXCEL

on 2023-05-31
Available from Previous Cycle = 23 (red)

Employee	Leave Type	Date	Accrual	Entitlement	Taken	Adjustment	Available from Previous Cycle	Balance
Gouws, Neil Leon	Annual	2025-02-28	1,67	16,67		0,00	3,00	19,67
Gouws, Neil Leon	Annual	2025-03-31	1,67	18,33		0,00	3,00	21,33
Gouws, Neil Leon	Annual	2025-04-30	1,67	20,00		0,00	3,00	23,00
Gouws, Neil Leon	Annual	2025-05-31	1,67	1,67		0,00	23,00	24,67
Gouws, Neil Leon	Annual	2025-06-30	1,67	3,33		0,00	23,00	26,33
Gouws, Neil Leon	Annual	2025-07-31	1,67	5,00		0,00	23,00	28,00
Gouws, Neil Leon	Annual	2025-08-31	1,67	6,67		0,00	23,00	29,67
Gouws, Neil Leon	Annual	2025-09-30	1,67	8,33		0,00	23,00	31,33
Gouws, Neil Leon	Annual	2025-10-31	1,67	10,00	8,00	0,00	15,00	25,00
Gouws, Neil Leon	Annual	2025/11/30	1,67	11,67	1,00	0,00	15,00	25,67

Taken = 9 (all yellow down "Taken")

FROM AIRTABLE

`Leave Taken for Current Period` = 5

`Accrued Leave for Current Period` = 11.5

THERORE

`Total Leave Available (alternative)` =(23-9) + (11.5-5) = 20.5

NOTE
different from value in excel since `Leave Taken for Current Period` in Airtable
does not match `Taken` in Excel
therefore updated

`Total Leave Taken for Current Period (prior to onboarding)` = (9-5) = 4

THEN

`Total Leave Available (alternative)` = 25.5 ~ 25.67

# South African ID Number	Full Name	Plato Start Date	Total Leave Available (alternative)	Total Leave Accumulated in Previous Period(s) (prior to onboarding)	Total Leave Taken for Current Period (prior to onboarding)	Entitled Leave for Current Period	Leave Taken for Current Period
971104...	Lize Nel	2025-02-01	16.3	0.00	0.00	16.3	0.0
841016...	Lourette Durand	2024-09-30	3.1			3.1	0.0
930603...	Maqhawe Kheswa	2021-07-11	10.6	7.00	3.00	7.6	1.0
960312...	Megan van Schalkwyk	2025-05-05	11.2			11.2	0.0
981117...	Mine Pfaff	2023-12-01	20.7	14.00	13.00	19.7	0.0
950719...	Neil Gouws	2023-05-01	25.5	23.00	4.00	11.5	5.0

Employee	Leave Type	Date	Accrual	Entitlement	Taken	Adjustment	Available from Previous Cycle	Balance	
Gouws, Neil Leon	Annual	2025-02-28	1,67	16,67		0,00	3,00	19,67	
Gouws, Neil Leon	Annual	2025-03-31	1,67	18,33		0,00	3,00	21,33	
Gouws, Neil Leon	Annual	2025-04-30	1,67	20,00		0,00	3,00	23,00	
Gouws, Neil Leon	Annual	2025-05-31	1,67	1,67		0,00	23,00	24,67	
Gouws, Neil Leon	Annual	2025-06-30	1,67	3,33		0,00	23,00	26,33	
Gouws, Neil Leon	Annual	2025-07-31	1,67	5,00		0,00	23,00	28,00	
Gouws, Neil Leon	Annual	2025-08-31	1,67	6,67		0,00	23,00	29,67	
Gouws, Neil Leon	Annual	2025-09-30	1,67	8,33		0,00	23,00	31,33	
Gouws, Neil Leon	Annual	2025-10-31	1,67	10,00	8,00	0,00	15,00	25,00	1,6
Gouws, Neil Leon	Annual	2025/11/30	1,67	11,67	1,00	0,00	15,00	25,67	

ⓘ **slight difference in Balance and `Total Leave Available (alternative)` or `Total Leave Available` is due to the fact that in accrual leave calculated on daily basis instead of per month**

hence Balance will be slightly greater for 30th of November given these values are now being calculated for the 26th of November

Notes

Full Name	Plato Start Date	Total Leave Available (alternative)	Total Leave Accumulated in Previous Period(s) (prior to onboarding)	Total Leave Taken for Current Period (prior to onboarding)	Entitled Leave for Current Period	Leave Taken for Current Period
Daneel Denysschen	2025-04-14	11.4	0.00	1.00	12.4	0.0
Harry Mole	2023-06-01	25.8	19.00	1.00	9.8	2.0
Imke Visser	2023-07-01	4.2			8.2	4.0
Jaime Mervitz	2024-07-01	10.2	2.00	0.00	8.2	0.0
Johnny Grant	2023-06-01	4.1	2.33	0.00	9.8	8.0
Jonathan Du Toit	2024-10-01	-2.9	0.00	5.00	3.1	1.0
Kabir Mangrey	2025-05-14	9.8	0.00	1.00	10.8	0.0
Lize Nel	2025-02-01	16.4	0.00	0.00	16.4	0.0
Lourette Durand	2024-09-30	3.2			3.2	0.0
Maqhawe Kheswa	2021-07-11	10.6	7.00	3.00	7.6	1.0
Megan van Schalkwyk	2025-05-05	11.3			11.3	0.0
Mine Pfaff	2023-12-01	18.8	11.00	12.00	19.8	0.0
Neil Gouws	2023-05-01	25.5	23.00	4.00	11.5	5.0
Nika Bedeker	2025-02-28	5.9	0.00	9.00	14.9	0.0
Paton Raman	2025-09-11	4.2	0.00		4.2	0.0
Retha van Rhijn	2024-01-01	21.1	10.00	3.00	18.1	4.0

use view `setting up the system`

> 🔥 **was assumed** that employees started working on 1st of month but for some obviosuly not case
>
> Nel, Lize
> Bothma, Chantel
> Mangrey, Kabir

Gouws, Neil Leon

leave according to excel up to end of November does not match what has been submitted on Airtable
hence difference used for `Total Leave Taken for Current Period (prior to onboarding)`

Grant, John Henry

`Total Leave Taken for Current Period (prior to onboarding)` set to zero since "Taken" (from Excel) for current period matches `Leave Taken for Current Period` submitted on Airtable

Els, Ashley Ryan

leave according to excel up to end of November does not match what has been submitted on Airtable

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

Els, Ashley Ryan	Annual	2023-06-30	1,67	8,33		0,00	0,00	8,33
Els, Ashley Ryan	Annual	2023-07-31	1,67	10,00		0,00	0,00	10,00
Els, Ashley Ryan	Annual	2023-08-31	1,67	11,67		0,00	0,00	11,67
Els, Ashley Ryan	Annual	2023-09-30	1,67	13,33		0,00	0,00	13,33
Els, Ashley Ryan	Annual	2023-10-31	1,67	15,00		0,00	0,00	15,00
Els, Ashley Ryan	Annual	2023-11-30	1,67	16,67		0,00	0,00	16,67
Els, Ashley Ryan	Annual	2023-12-31	1,67	18,33	3,00	0,00	0,00	15,33
Els, Ashley Ryan	Annual	2024-01-31	1,67	20,00	4,00	0,00	0,00	13,00
Els, Ashley Ryan	Annual	2024-02-29	1,67	1,67		0,00	13,00	14,67
Els, Ashley Ryan	Annual	2024-03-31	1,67	3,33		0,00	13,00	16,33
Els, Ashley Ryan	Annual	2024-04-30	1,67	5,00		0,00	13,00	18,00

start date taken to be Feb since alreayd at Entitlement of 8.33 in June

Mole, Harry Levi

leave according to excel up to end of November does not match what has been submitted on Airtable

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

Pfaff, Mine

no leave on Airtable so total from excel used for `Total Leave Taken for Current Period (prior to onboarding)`

Black, Shannon Tiffany

leave according to excel up to end of November does not match what has been submitted on Airtable

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

van Rhijn, Retha

leave according to excel up to end of November does not match what has been submitted on Airtable

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

Gosling, Duane

not found

Malan, Joubert

not found

Wessels, Rinus

# SouthAfricanIDNumber	_fx_ Full Name	📅 Plato Start Date ⓘ	_fx_ Total Leave Available (alternative) ⓘ	# Total Leave Accumulated in Previous Period(s) (prior to onboarding) ⓘ	# Total Leave Taken for Current Period (prior to onboarding) ⓘ	_fx_ Entitled Leave for Current Period	◎ Le Pe
850617...	Wessels, Rinus	2024-04-28	9.5	0.83	3.00	11.7	

Wessels, Rinus	Annual	2024-05-31	1,67	1,67		0,00	0,00	1,67
Wessels, Rinus	Annual	2024-06-30	1,67	3,33		0,00	0,00	3,33
Wessels, Rinus	Annual	2024-07-31	1,67	5,00		0,00	0,00	5,00
Wessels, Rinus	Annual	2024-08-31	1,67	6,67		0,00	0,00	6,67
Wessels, Rinus	Annual	2024-09-30	1,67	8,33		-7,50	0,00	0,83
Wessels, Rinus	Annual	2025-06-30	1,67	1,67		4,33	0,00	6,00
Wessels, Rinus	Annual	2025-07-31	1,67	3,33	3,00	0,00	0,00	4,66
Wessels, Rinus	Annual	2025-08-31	1,67	5,00		0,00	0,00	6,33
Wessels, Rinus	Annual	2025-09-30	1,67	6,67		0,00	0,00	8,00
Wessels, Rinus	Annual	2025-10-31	1,67	8,33		0,00	0,00	9,66
	Annual	2025/11/30	1,67	10,00		0,00	0,00	11,33

relatively big difference - not sure why

Ngwaudzo, Caleb Bandile

total differ because does not get same 1,67 per month as others

Employee	Leave Type	Date	Accrual	Entitlement	Taken	Adjustment	Previous Cycle	Balance	
Ngwaudzo, Caleb Bandile	Annual	2024-09-30	1,25	6,25		0,00	0,00	6,25	
Ngwaudzo, Caleb Bandile	Annual	2024-10-31	1,25	7,50		0,00	0,00	7,50	
Ngwaudzo, Caleb Bandile	Annual	2024-11-30	1,25	8,75		0,00	0,00	8,75	
Ngwaudzo, Caleb Bandile	Annual	2024-12-31	1,25	10,00		0,00	0,00	10,00	
Ngwaudzo, Caleb Bandile	Annual	2025-01-31	1,25	11,25		0,00	0,00	11,25	
Ngwaudzo, Caleb Bandile	Annual	2025-02-28	1,25	12,50		0,00	0,00	12,50	
Ngwaudzo, Caleb Bandile	Annual	2025-03-31	1,25	13,75	3,00	0,00	0,00	10,75	
Ngwaudzo, Caleb Bandile	Annual	2025-04-30	1,25	15,00		0,00	0,00	12,00	
Ngwaudzo, Caleb Bandile	Annual	2025-05-31	1,25	1,25		0,00	12,00	13,25	
Ngwaudzo, Caleb Bandile	Annual	2025-06-30	1,25	2,50		0,00	12,00	14,50	
Ngwaudzo, Caleb Bandile	Annual	2025-07-31	1,25	3,75		0,00	12,00	15,75	
Ngwaudzo, Caleb Bandile	Annual	2025-08-31	1,25	5,00		0,00	12,00	17,00	
Ngwaudzo, Caleb Bandile	Annual	2025-09-30	1,25	6,25		0,00	12,00	18,25	
Ngwaudzo, Caleb Bandile	Annual	2025-10-31	1,25	7,50		0,00	12,00	19,50	
	Annual	2025/11/30	1,25	8,75		0,00	0,00	20,75	

hence created new group

Leave Structure - manual ∨   👁 1 hidden field ≡ Filter ☰ Group ↕ Sort 🎨 Colo

	A Group	ⓘ	⊘ Category	ⓘ	# Number of Days... ⓘ	⊘ Accrual Basis	ⓘ	⊘ According to Calendar Year	ⓘ	✉ Slack Email of... ⓘ	☑ Message Approver...	⊘ In Use	ⓘ	+
1	20-days		Approval Required		20	Yes		No				Yes		
2	15-days		Approval Required		15	Yes		No				Yes		
+														

Leave Structure - manual
Leave Structure - man...
Leave Structure

Leave Structure - manu...
Leave Structure - Custom

w

result

👁 31 hidden fields   ≡ Filtered by Full Name   ☰ Group   ↕ Sorted by 1 field

⇅ S o u t h A fr ic a n I D N u m b e r	ƒₓ Full Name	📅 Plato Start Date ⓘ	ƒₓ Total Leave Available (alternative) ⓘ	⊞ Group ⓘ	# Total Leave Accumulate d in Previous Period(s) (prior to onboarding)	# Total Leave Taken for Current Period (prior to onboarding) ⓘ	ƒₓ Entitled Leave for Current Period	◎ Leave Taken for Current ⓘ Period	+
235561	Ngwaudzo, Caleb Bandile	2024-05-01	20.6	15-days ✕	12.00	0.00	8.6	0.0	

Kheswa, Maqhawe Gift

`Total Leave Taken for Current Period (prior to onboarding)` set to zero since "Taken" (from Excel) for current period matches `Leave Taken for Current Period` submitted on Airtable

total differ because does not get same 1,67 per month as others

71	Kheswa, Maqhawe Gift	Annual	2025-02-28		1,25	12,50		0,00	0,00	8,50
72	Kheswa, Maqhawe Gift	Annual	2025-03-31		1,25	13,75	1,00	0,00	0,00	8,75
73	Kheswa, Maqhawe Gift	Annual	2025-04-30		1,25	15,00		0,00	0,00	10,00
74	Kheswa, Maqhawe Gift	Annual	2025-05-31		1,25	1,25	3,00	0,00	7,00	8,25
75	Kheswa, Maqhawe Gift	Annual	2025-06-30		1,25	2,50		0,00	7,00	9,50
76	Kheswa, Maqhawe Gift	Annual	2025-07-31		1,25	3,75		0,00	7,00	10,75
77	Kheswa, Maqhawe Gift	Annual	2025-08-31		1,25	5,00		0,00	7,00	12,00
78	Kheswa, Maqhawe Gift	Annual	2025-09-30		1,25	6,25		0,00	7,00	13,25
79	Kheswa, Maqhawe Gift	Annual	2025-10-31		1,25	7,50		0,00	7,00	14,50
80		Annual	2025/11/30		1,25	8,75	1,00	0,00	0,00	14,75
81										
82	Mervitz, Jaime Anne	Annual	2024-07-31					0,00	0,00	0,00

hence need new group

Dunstan, Sherilee Barnes

`Total Leave Taken for Current Period (prior to onboarding)` set to zero since "Taken" (from Excel) for current period matches `Leave Taken for Current Period` submitted on Airtable

du Toit, Jonathan

`Total Leave Taken for Current Period (prior to onboarding)` set to zero since "Taken" (from Excel) for current period matches `Leave Taken for Current Period` submitted on Airtable

Nel, Lize

⚡ **should update exact** `Plato Start Date`

since obviosuly not 1st (not full 1,49 allocated)

Bedeker, Nika

no leave on Airtable so total from excel used for `Total Leave Taken for Current Period (prior to onboarding)`

Bothma, Chantel

⚡ **should update exact** `Plato Start Date`

363									
364	**Bothma, Chantel**	**Annual**	**2025-03-31**	**0,81**	**0,81**		**0,00**	**0,00**	**0,81**
365	Bothma, Chantel	Annual	2025-04-30	1,67	2,47		0,00	0,00	2,47
366	Bothma, Chantel	Annual	2025-05-31	1,67	4,14		0,00	0,00	4,14
367	Bothma, Chantel	Annual	2025-06-30	1,67	5,81		0,00	0,00	5,81
368	Bothma, Chantel	Annual	2025-07-31	1,67	7,47	2,00	0,00	0,00	5,47
369	Bothma, Chantel	Annual	2025-08-31	1,67	9,14	3,00	0,00	0,00	**4,14**
370	Bothma, Chantel	Annual	2025-09-30	1,67	10,81		0,00	0,00	5,81
371	Bothma, Chantel	Annual	2025-10-31	1,67	12,47		0,00	0,00	7,47

no leave on Airtable so total from excel used for `Total Leave Taken for Current Period (prior to onboarding)`

Smuts, Talita

not found

Denysschen, Daneel Cornelius

no leave on Airtable so total from excel used for `Total Leave Taken for Current Period (prior to onboarding)`

Mangrey, Kabir

6	Employee	Leave Type	Date	Accrual	Entitlement	Taken	Adjustment	Available from	Balance
90	Mangrey, Kabir	Annual	2025-04-30	0,94	0,94		0,00	0,00	0,94
91	Mangrey, Kabir	Annual	2025-05-31	1,67	2,61		0,00	0,00	2,61
92	Mangrey, Kabir	Annual	2025-06-30	1,67	4,28		0,00	0,00	4,28
93	Mangrey, Kabir	Annual	2025-07-31	1,67	5,94		0,00	0,00	5,94

set `Plato Start Date` to 14th instead of 2025-04-01 since obviously not get entire 1,67 for that month

> ⚠ **NOTE: may be true for other employees also so should be reviewed since this was assumed in most cases**

Engelbrecht, Stefan Le Roux

Pani, Xolani Shepherd

not found