Airtable 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

- **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

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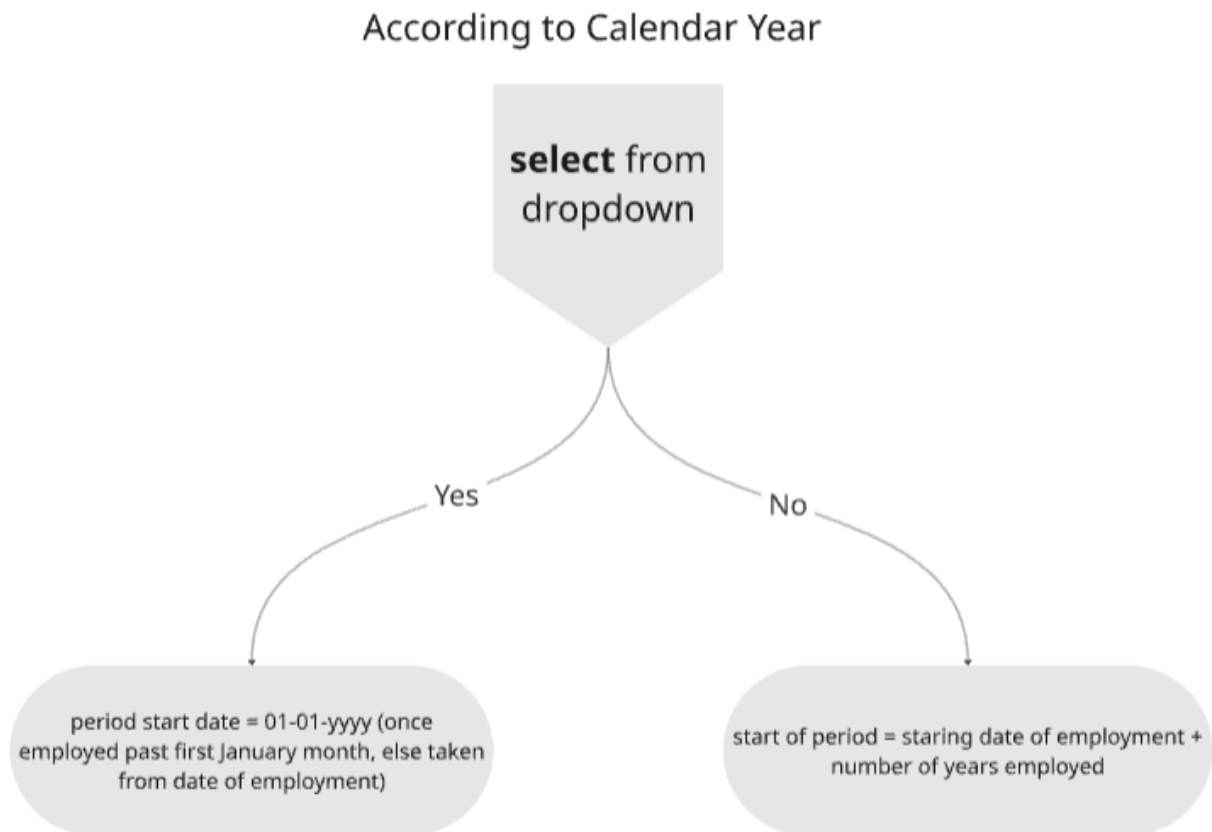
accomplished with setting in form to display only entries from (locked view) filtered to `In Use = Yes`

Number of Days Leave

- **Type**: Number
- **Description**: Defines annual leave entitlement in days.
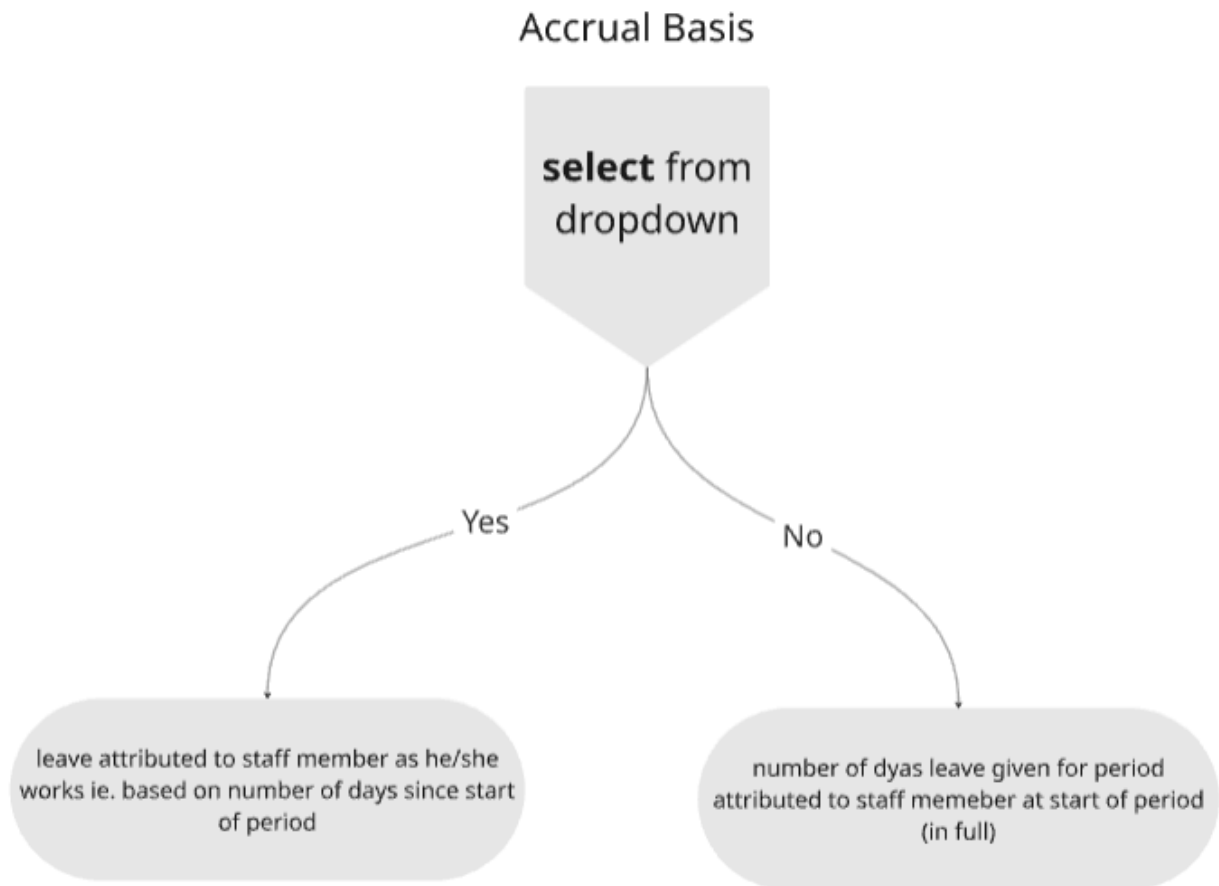
According to Calendar Year

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

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

Accrual Basis

- **Type**: Single Select

- **Description**: Specifies if leave accrues over time rather than being granted upfront.

Accrual Basis

```
                    select from
                    dropdown

          Yes                      No

  leave attributed to staff      number of dyas leave given for period
  member as he/she works ie.     attributed to staff memeber at start of period
  based on number of days since  (in full)
  start of period
```

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)

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)

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
```

- **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	Accumulatio... ⌄	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](#).

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.

	# Public Holidays Year	A͟ AI-Generated List of...	⩵ Linked "Employe... ⓘ	+
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](#).

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.

Include in Current Period

- **Type**: Formula
- **Description**: Determines if this [Duration of Leave](#) should be included in current period [Leave Taken for Current Period](#)

```
IF(
    AND(
        {Leave Start Date} >= {Current Period Start Date},
        {Leave Start Date} <= {Current Period End Date}
    ),
    "Yes",
    "No"
)
```

Leave Start Date is **on or after** the period start AND Leave Start Date is **on or before** the period end → **"Yes"**

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

---

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

activate supporting automations

Zero Leave Request

Roll Over and Restart

> creates new record in *Accumulated Leave* with remainder of leave available for period ([Leave Available for Current Period](#)) for roll up in [Leave Accumulated over Previous Periods](#)

New Team Member (via form)

add employees in Team Members Information

5. distribute to all user as to populate table using

use form: Create Team Member

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

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](#)	[Team Name](#) 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.

End of Document
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