

Airtable README - Move Orthopedics Timesheets - v4

aka Maryke

Intention of Airtable base is to give accounts manager overview of how to invoice/collect employees' salary from each of the doctors (Hardcastle, Wever, Groenewald) as result of proportion of time shared employee has spent at their practice.

⚡ for each variation of Location and Type of Work a new form must be submitted

therefore these fields set to "Single Select" type fields (previously "Multiple Select")

✍ Idea for Future Version (and more generic)

refer to refer to v3 - grouped

- extract hours worked from start and stop time (*split fields to Start Time and End Time - "Duration" type fields*)
 - determine overtime based thereon
- combine worksheets of different individuals working for same organization and use unique identifier (Name or ID Number) to split entries
 - could make Recon sheet for each OR have group by this identifier in Recon sheet
 - can then also determine overtime on individual basis ie. X works 6h and Y 10h

How Base Works

Tables

Data

Date

(identifier)

Week Number

Type: Formula

WEEKNUM(Date)

Location

Type: Single Select

- Hardcastle
- Wever
- Groenewald
- Practise
divided equally
- SICK
- LEAVE

Type of Work

Type: Single Select

- Meeting
- Theatre Preparation
- ...

Location Notes

Type: Long Text

Start-Stop Time

Type: Single Line Text

Hours

Type: Duration

Format: duration (h:mm)

Overtime

Type: Duration

Format: duration (h:mm)

Total Hours

Type: Formula

Description: calculates the sum of regular and overtime hours for each record.

Hours + Overtime

Format: duration (h:mm)

Queries

Type: Long Text

Billing Month

Type: Formula

Description: displays the full month name (e.g., January, February) from the Date field based on field [Date](#) entered in [Timesheet Form](#)

```
IF(DATETIME_FORMAT({Date Created}, 'MMMM') = {Billing Month},  
    'No',  
    'Yes'  
)
```

Billing Month - deprecated

refer to v1 for more detail

once satisfied with base - delete this field

Link to Recon

Type: Link to Other Records

NOTICE: do not allow linking to multiple records in [Recon](#) to prevent counting duplicated work

Date Created

Type: Built-In

NOTICE: enables [Is Manual Intervention Required?](#) and can be used to verify if individual claims to have completed the form in timely manner

Is Manual Intervention Required?

Type: Formula

Description: indicates if manual intervention is needed by comparing the record's creation month to the Billing Month.

if time entry logged/created is after automation trigger, will need to link data to "Recon" sheet

using "MANUALLY FIX RECON" view

NB - link based on Billing Month (or Calendar Month if this option chosen)

```
IF(
    AND(
        DATETIME_FORMAT({Date}, 'MMMM') = {Billing Month},
        {Link to Recon} = BLANK(),
    ),
    'Yes',
    'No'
)
```

Recon

Trigger Date Time

(identifier)

Previous Month aka Billing Month

Type: Formula

Description: used in automation [for future Recon updates](#) to group all records from previous month in [Data sheet](#) into same [Recon sheet](#) record

```
DATETIME_FORMAT(
    DATEADD({Trigger Date Time}, -1, 'month'),
    'MMMM'
)
```

ACTION DETAILS

Action type: Find records

Find up to 1000 records in this base either from a view or based on specific conditions.

LABELS

Description: Enter a description

CONFIGURATION

Action will run... Always

* Table: Data

* Find records based on Condition

* Conditions: Where Billing Month is Previous Month aka Billi...

+ Add condition

Maximum record limit: 1000

TEST STEP

Test this trigger to confirm its configuration is correct. The data from this test can be used in later steps. Test output is limited to 10 records.

Test action

Year

Type: Formula

YEAR({Trigger Date Time})

used to generate a view

Data	Recon	+ Add or import							3 hidden fields	Filtered by Year	Group	Sort	Color	Share and sync
			2025 Recon Sheet			In this view, show months			3 hidden fields	Filtered by Year	Group	Sort	Color	Share and sync
+ Create new...			<input type="checkbox"/> A Trigger Date Time	Where	Year	=	2025				Groenewald Total ...	f Total Hours	f Hard	
Q Find a view			1 2025-07-27T09:00:00.058Z								0:00	17:00		
≡ FULL VIEW			2 2025-07-29T09:00:00.098Z								32:00	142:00		
≡ 2025 Recon Sheet			3 2025-07-29T09:00:00.133Z								48:00	162:30		
			4 2025-07-29T09:00:00.137Z	March		73:20	53:00				30:00	156:20		
			5 2025-07-29T09:00:00.168Z	January		43:00	12:00				0:00	55:00		
			6 2025-07-29T09:00:00.228Z	April		53:00	42:00				38:00	133:00		
			7 2025-07-31T21:30:00.041Z	July		17:30	12:00				10:00	39:30		
			8 2025-08-21T21:45:00.035Z	August		44:30	43:30				33:00	121:00		
			9 2025-09-21T21:45:38.938Z	September		21:00	17:00				19:00	57:00		
			+											

Hardcastle | Total Hours

Type: Rollup

with condition based on [Location](#)

Formula: sum(values)

Format: duration (h:mm)

Wever | Total Hours

Type: Rollup

with condition based on [Location](#)

Formula: `sum(values)`

Format: duration (h:mm)

Groenewald | Total Hours

Type: Rollup

with condition based on [Location](#)

Formula: `sum(values)`

Format: duration (h:mm)

Practise | Total Hours

Type: Rollup

with condition based on [Location](#)

Formula: `sum(values)`

Format: duration (h:mm)

Total Hours

Type: Formula

```
{Hardcastle | Total Hours} + {Wever | Total Hours} + {Groenewald |  
Total Hours} + {Practise | Total Hours}
```

Format: duration (h:mm)

Hardcastle | Proportion

Type: Formula

```
({Hardcastle | Total Hours} + (1/3)* {Practise | Total Hours}) / {Total Hours}
```

Format: duration (h:mm)

Wever | Proportion

Type: Formula

```
({Wever | Total Hours} + (1/3)*{Practise | Total Hours}) / {Total Hours}
```

Format: duration (h:mm)

Groenewald | Proportion

Type: Formula

```
{Groenewald | Total Hours} + (1/3)*{Practise | Total Hours}) / {Total Hours}
```

Format: duration (h:mm)

Forms

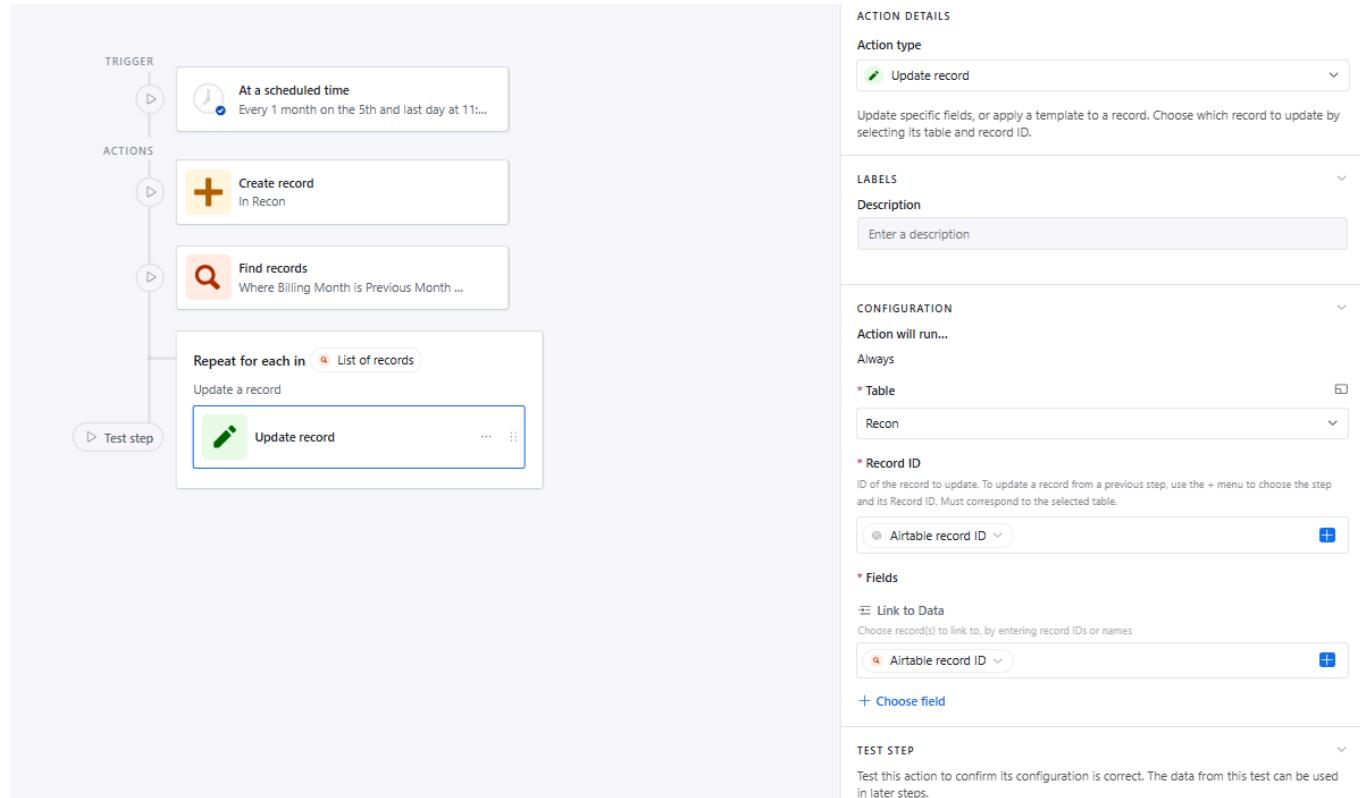
Timesheet Form

uses [Date](#), [Location](#), [Location notes](#), [Start-Stop Time](#), [Hours](#), [Overtime](#), [Type of Work](#)

Automations

for future Recon updates

eg. November 2025 - end



for back-dated Recon updates

 January 2025 

At a scheduled time, create a record, and 2 more ...

 February 2025 

At a scheduled time, create a record, and 2 more ...

 March 2025 

At a scheduled time, create a record, and 2 more ...

 May 2025 

At a scheduled time, create a record, and 2 more ...

 April 2025 

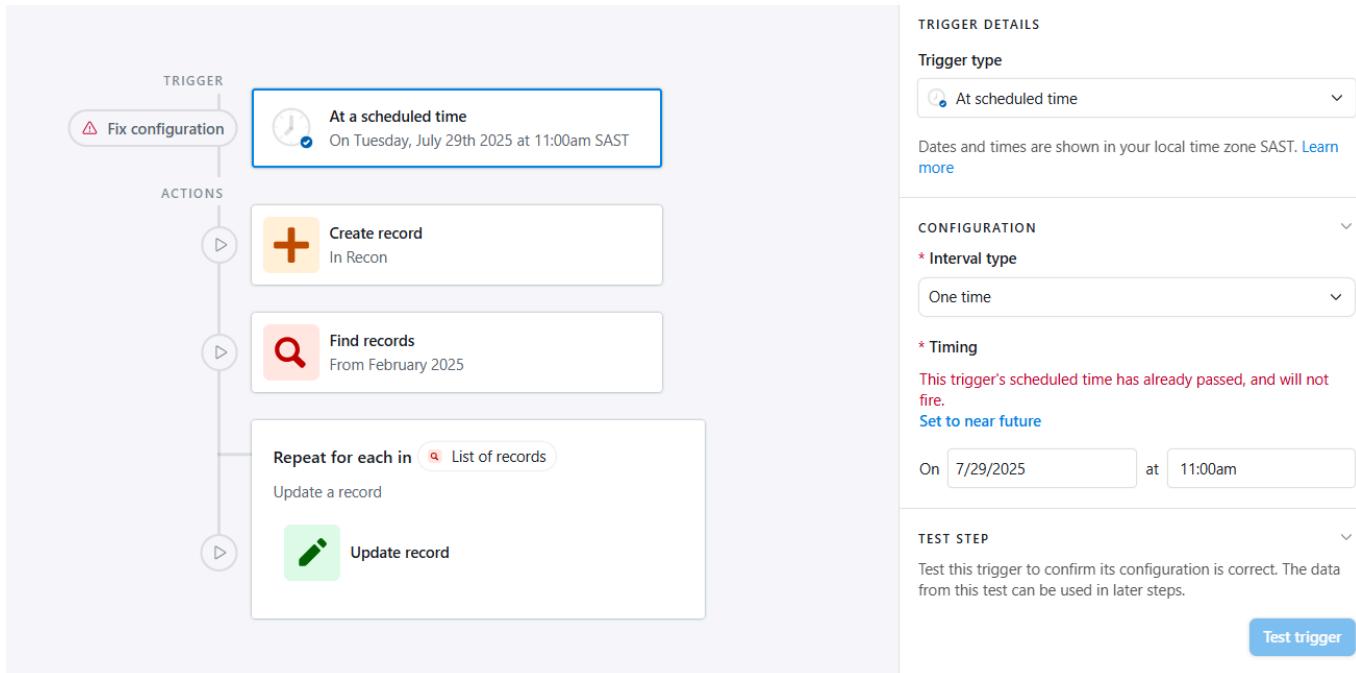
At a scheduled time, create a record, and 2 more ...

 June 2025 

At a scheduled time, create a record, and 2 more ...

 July 2025 

At a scheduled time, create a record, and 2 more ...



set trigger at specific time

use views in [Data](#) as filter for records to be linked to given record in [Recon](#)

The screenshot shows a CRM application interface with a navigation bar at the top. The main area displays a list of records with columns for Date and Location Notes. A modal window is open, allowing the user to filter the results by Year (set to 2025) and Billing Month (set to March). The modal also includes buttons for 'Cancel' and 'Apply'. On the left side, there's a sidebar with options like 'Create new...', 'Find a view', and a section for 'for back-dated Recon updates' which includes links for January 2025, February 2025, March 2025 (which is selected), and April 2025.

Date	Location Notes
March 17, 2025	
March 19, 2025	
March 24, 2025	
March 26, 2025	
March 28, 2025	
March 31, 2025	
March 4, 2025	08H00 - 17H00
March 5, 2025	08H00 - 12H00
March 7, 2025	13H00 - 16H00
March 11, 2025	08H00 - 17H00
March 12, 2025	08H00 - 12H00
March 18, 2025	08H00 - 17H00

End of Document

Last updated: November 06, 2025