Airtable README - Move Orthopeadics Timesheets - v1

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 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

Requires Standardization

Location
Type of Work

How Base Works

Tables

Data

Date

(identifier)

Week Number

FORMULA

```
WEEKNUM(Date)
```

Week

SINGLE SELECT

- Week 1
- Week 2
- Week 3
- Week 4
- Week 5

deprecated

Location

SINGLE SELECT

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

Type of Work

SINGLE SELECT

- Meeting
- Theatre Preparation
- ...

Location Notes

LONG TEXT

Start-Stop Time

SINGLE LINE TEXT

Hours

DURATION
FORMAT: duration (h:mm)

Overtime

DURATION
FORMAT: duration (h:mm)

Total Hours

FORMULA
"""
calculates the sum of regular and overtime hours for each record.
"""

```
Hours + Overtime
```

FORMAT: duration (h:mm)

Queries

LONG TEXT

Calendar Month

FORMULA
"""
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

FORMULA
""""

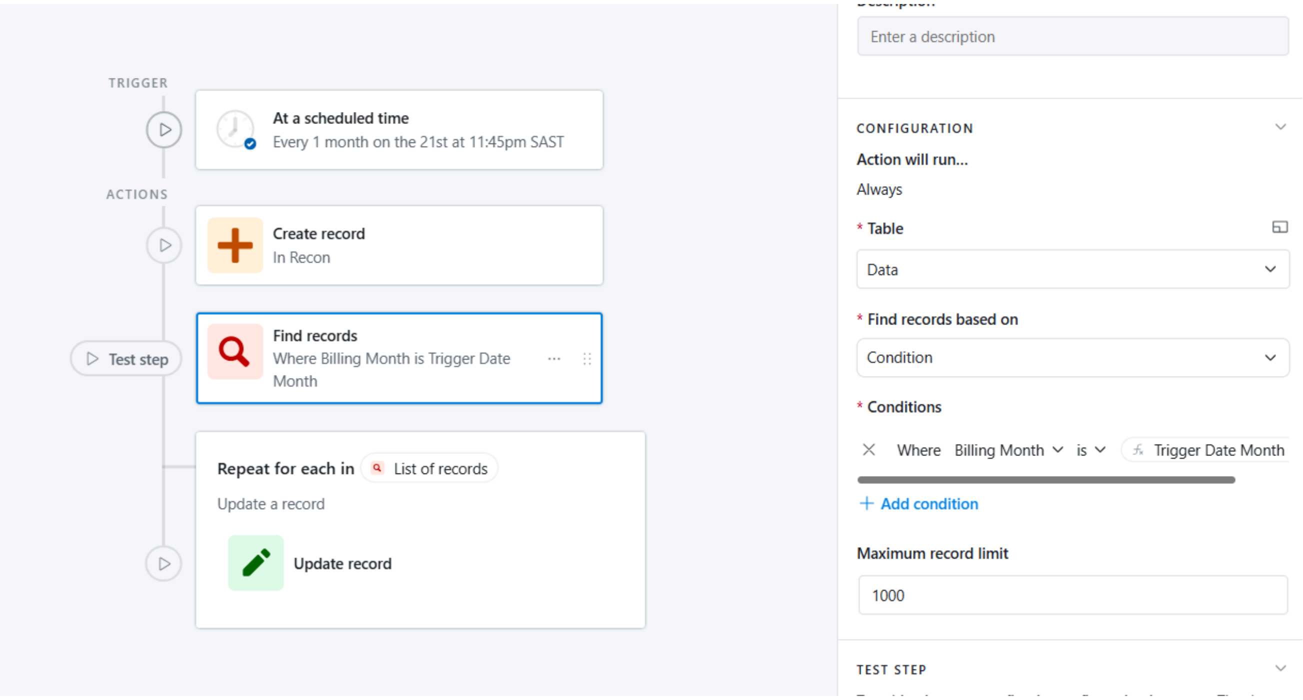
returns the full month name for billing, shifting to the next month if the date is after the 21st
""""

based on field Date entered in Timesheet Form
argument
allows user of Recon sheet to do this before "pay-day" instead of retrospectively

```
DATETIME_FORMAT(IF(
  DAY({Date}) > 21,
  DATEADD({Date}, 1, 'month'),
  {Date}
  ), 'MMMM')
```

NOTE
misinterpretation from my side originally
thought this was a requirement but later informed work is retrospective so can therefore remove this completely
would have to

- □ alter automation August 2025 - end to run on last day of each month
- □ update "Find Records" to use Calendar Month instead of Billing Month



TRIGGER
At a scheduled time
Every 1 month on the 21st at 11:45pm SAST

ACTIONS
Create record
In Recon

Find records
Where Billing Month is Trigger Date Month

Repeat for each in List of records
Update a record
Update record

Enter a description

CONFIGURATION
Action will run...
Always
* Table
Data
* Find records based on
Condition
* Conditions
Where Billing Month is Trigger Date Month
Add condition
Maximum record limit
1000

TEST STEP

- □ unlink all records from Data per record in Recon

- □ create custom automations to re-link all previous records (else do so manually) refer to Back-dated (eg. February 2025)
  ALSO
  is problematic if company works on calendar basis i.e., if resignation is effective first of next month since will want to view all for final "Calendar Month" of employment

Link to Recon

LINK TO ANOTHER RECORD
NOTE: do not allow linking to multiple records in Recon to prevent counting duplicated work

Date Created

BUILT-IN
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?

FORMULA
"""
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)

Billing Month

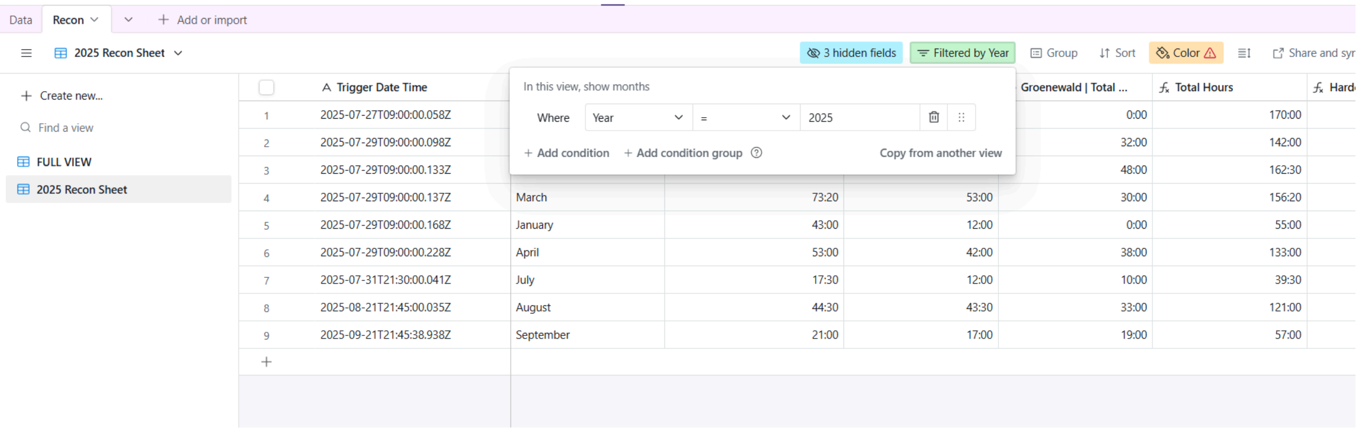
LOOKUP

Year

FORMULA

```
YEAR({Trigger Date Time})
```

used to generate a view



In this view, show months

Where Year = 2025

+ Add condition + Add condition group

Copy from another view

	Trigger Date Time				Groenewald | Total ...	Total Hours	Hard
1	2025-07-27T09:00:00.058Z				0:00	170:00	
2	2025-07-29T09:00:00.098Z				32:00	142:00	
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

ROLLUP
with condition based on Location
FORMULA: `sum(values)`
FORMAT: duration (h:mm)

Wever | Total Hours

ROLLUP
with condition based on Location
FORMULA: `sum(values)`
FORMAT: duration (h:mm)

Groenewald | Total Hours

ROLLUP
with condition based on Location
FORMULA: `sum(values)`
FORMAT: duration (h:mm)

Practise | Total Hours

ROLLUP
with condition based on Location
FORMULA: `sum(values)`
FORMAT: duration (h:mm)

Total Hours

FORMULA

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

FORMAT: duration (h:mm)

Hardcastle | Proportion

FORMULA

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

FORMAT: duration (h:mm)

Wever | Proportion

FORMULA

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

FORMAT: duration (h:mm)

Groenewald | Proportion

FORMULA

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

FORMAT: duration (h:mm)

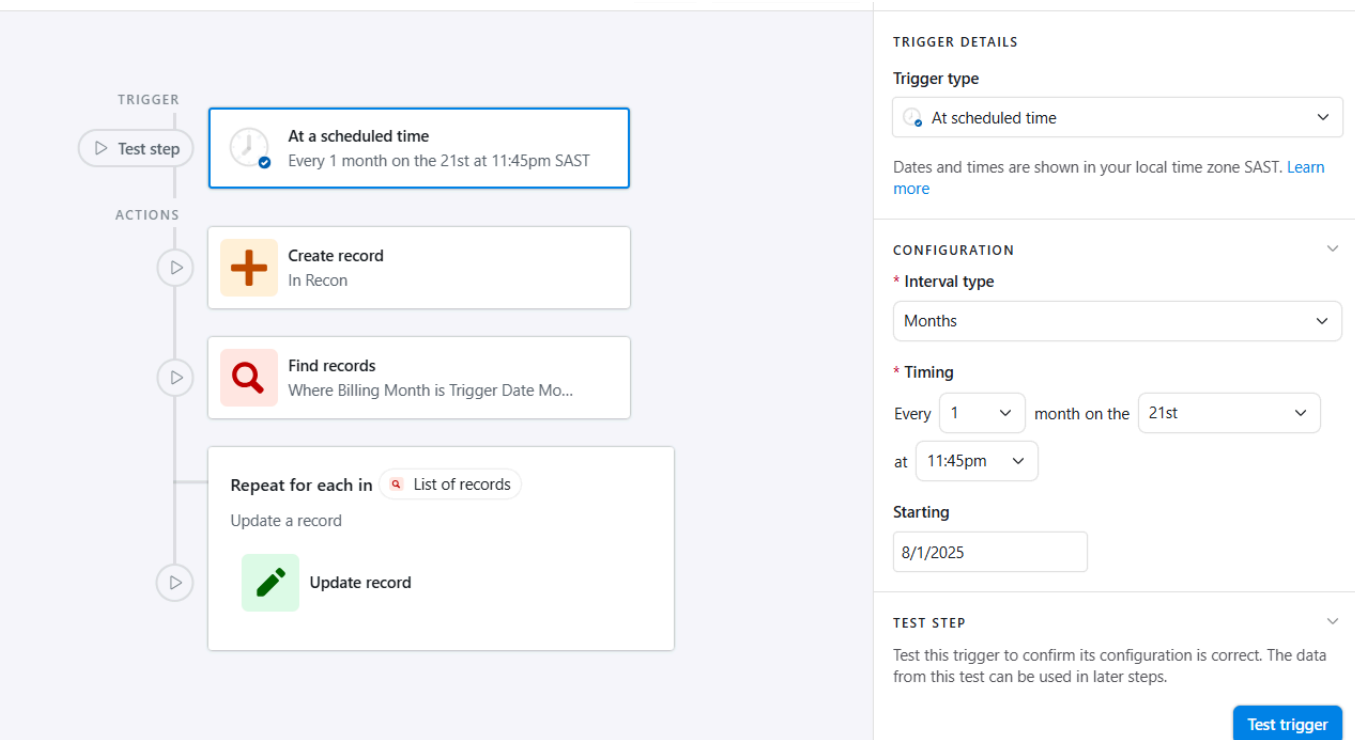
Forms

Timesheet Form

uses Date, Location, Location notes, Start-Stop Time, Hours, Overtime, Type of Work
records Date Created to allow for review if no data in "Recon" sheet

Automations

From this day forward (eg. August 2025 - end)



TRIGGER

At a scheduled time
Every 1 month on the 21st at 11:45pm SAST

ACTIONS

Create record
In Recon

Find records
Where Billing Month is Trigger Date Mo...

Repeat for each in List of records
Update a record

Update record

TRIGGER DETAILS

Trigger type: At scheduled time

Dates and times are shown in your local time zone SAST. Learn more

CONFIGURATION

* Interval type: Months

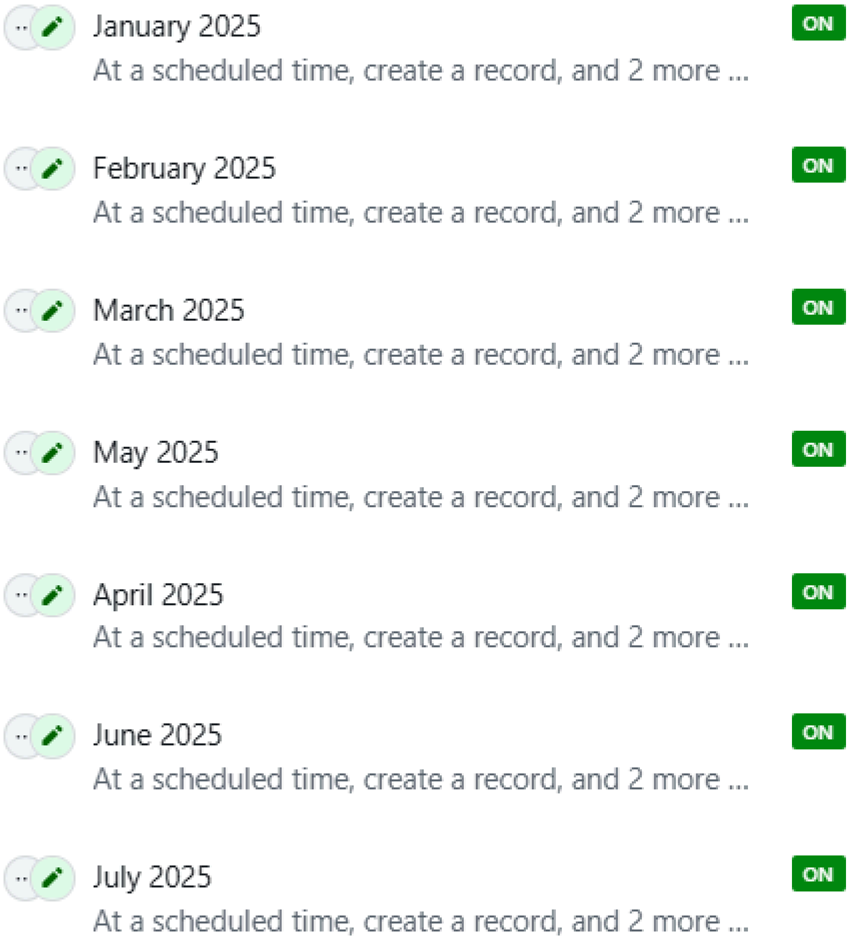
* Timing: Every 1 month on the 21st at 11:45pm

Starting: 8/1/2025

TEST STEP

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

Back-dated (eg. February 2025)



January 2025 ON
At a scheduled time, create a record, and 2 more ...

February 2025 ON
At a scheduled time, create a record, and 2 more ...

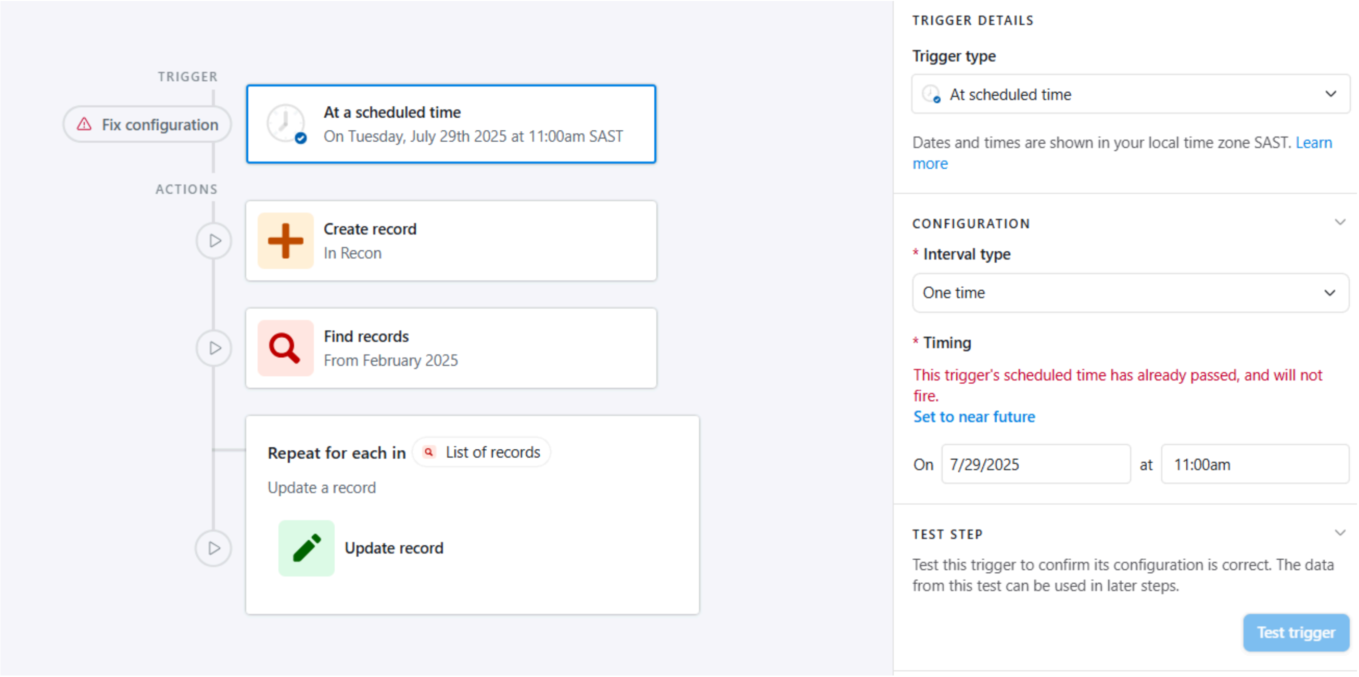
March 2025 ON
At a scheduled time, create a record, and 2 more ...

May 2025 ON
At a scheduled time, create a record, and 2 more ...

April 2025 ON
At a scheduled time, create a record, and 2 more ...

June 2025 ON
At a scheduled time, create a record, and 2 more ...

July 2025 ON
At a scheduled time, create a record, and 2 more ...



TRIGGER

Fix configuration

At a scheduled time
On Tuesday, July 29th 2025 at 11:00am SAST

ACTIONS

Create record
In Recon

Find records
From February 2025

Repeat for each in List of records
Update a record

Update record

TRIGGER DETAILS

Trigger type: At scheduled time

Dates and times are shown in your local time zone SAST. Learn more

CONFIGURATION

* Interval type: One time

* Timing

This trigger's scheduled time has already passed, and will not fire.
Set to near future

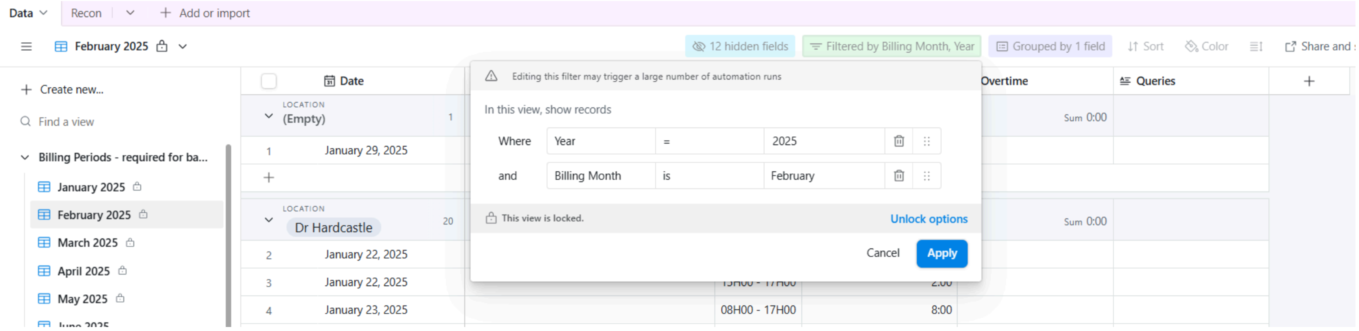
On 7/29/2025 at 11:00am

TEST STEP

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

set trigger at specific time

use views in Data as filter for records to be linked to given record in Recon



Editing this filter may trigger a large number of automation runs

In this view, show records

Where Year = 2025

and Billing Month is February

This view is locked.

End of Document

Last updated: November 06, 2025