

Airtable README - Move Orthopedics Timesheets - v2

aka Corali

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.

Additionally, (in amendment to v1), takes into consideration if employee has received a rebate amount from hospital in which case respective amounts due by each practice is reduced.

⚡ 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

⌚ Requires Standardization

[Location](#)

[Type of Work](#)

How Base Works

Tables

Data

Date

(identifier)

Week Number

FORMULA

```
WEEKNUM(Date)
```

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

Admin Hours

DURATION

FORMAT: duration (h:mm)

Theatre 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

MRH Rebate Amount Due

FORMULA

{Theatre Hours} / 3600 * 134.17

NOTICE: assumes fixed hourly rate

MHR Payment Received

CHECKBOX

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

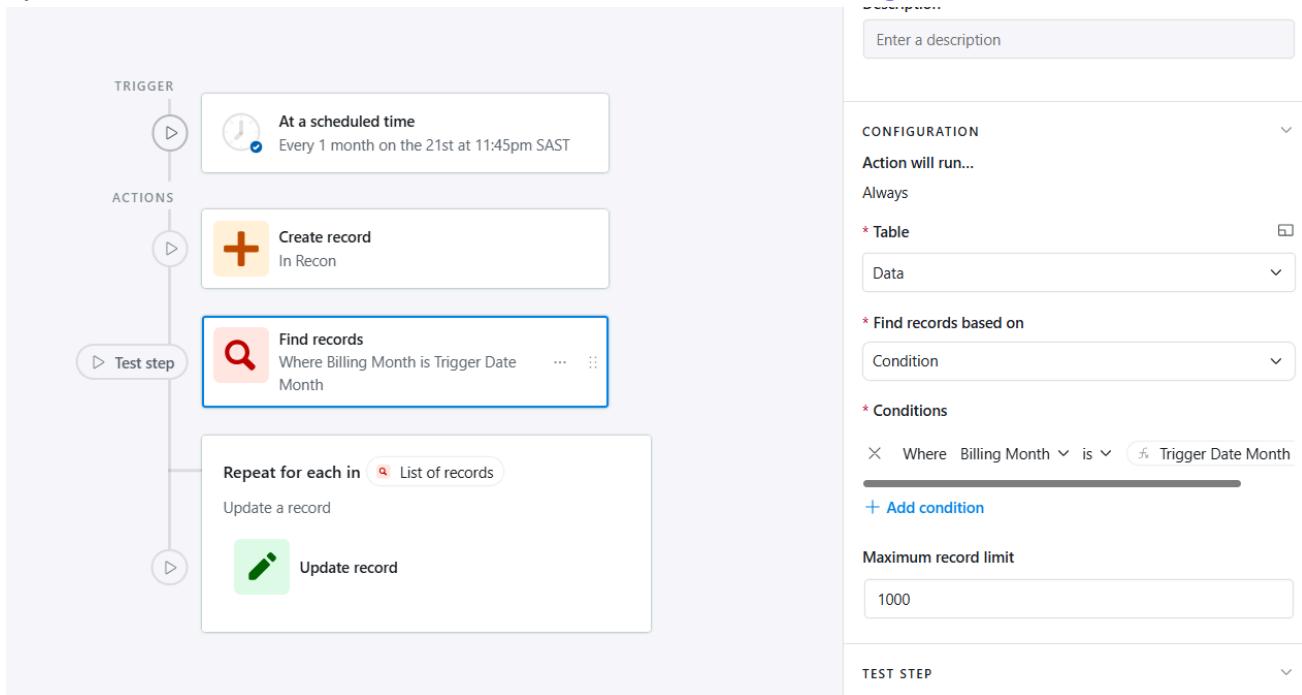
misinterpretation from my side originally

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](#)



- 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

The screenshot shows a Power BI Data view titled "Recon". A filter is applied to the "Year" column, set to "2025". The table contains columns: "Trigger Date Time", "Month", "Start Time", "End Time", "Total Hours", and "Hardcastle". The "Total Hours" column is highlighted in orange.

	A Trigger Date Time	Where	Year	=	2025	3 hidden fields	Filtered by Year	Group	Sort	Color	Share and sync
1	2025-07-27T09:00:00.058Z									0:00	17:00
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					30:00	156:20
5	2025-07-29T09:00:00.168Z	January			43:00					0:00	55:00
6	2025-07-29T09:00:00.228Z	April			53:00					38:00	133:00
7	2025-07-31T21:30:00.041Z	July			17:30					10:00	39:30
8	2025-08-21T21:45:00.035Z	August			44:30					33:00	121:00
9	2025-09-21T21:45:38.938Z	September			21:00					19:00	57:00

Hardcastle | Total Admin Hours

ROLLUP

using [Admin Hours](#)

with condition based on [Location](#)

FORMULA: `sum(values)`

FORMAT: duration (h:mm)

Hardcastle | Total Theatre Hours

ROLLUP

using [Theatre Hours](#)

with condition based on [Location](#)

FORMULA: `sum(values)`

FORMAT: duration (h:mm)

Wever | Total Admin Hours

ROLLUP

using [Admin Hours](#)

with condition based on [Location](#)

FORMULA: `sum(values)`

FORMAT: duration (h:mm)

Wever | Total Theatre Hours

ROLLUP

using [Theatre Hours](#)

with condition based on [Location](#)

FORMULA: `sum(values)`

FORMAT: duration (h:mm)

Groenewald | Total Admin Hours

ROLLUP

using [Admin Hours](#)

with condition based on [Location](#)

FORMULA: `sum(values)`

FORMAT: duration (h:mm)

Groenewald | Total Theatre Hours

ROLLUP

using [Theatre Hours](#)

with condition based on [Location](#)

FORMULA: `sum(values)`

FORMAT: duration (h:mm)

Practise | Total Admin Hours

ROLLUP

using [Admin Hours](#)

with condition based on [Location](#)

FORMULA: `sum(values)`

FORMAT: duration (h:mm)

Practise | Total Theatre Hours

ROLLUP

using [Theatre Hours](#)

with condition based on [Location](#)

FORMULA: `sum(values)`

FORMAT: duration (h:mm)

Total Hours

FORMULA

```
{Hardcastle | Total Hours} + {Never | Total Hours} + {Groenewald | Total Hours}
```

FORMAT: duration (h:mm)

Practise | Total Hours

FORMULA

```
{Practise | Total Admin Hours} + {Practise | Total Theatre Hours}
```

FORMAT: duration (h:mm)

Hardcastle | Total Hours

FORMULA

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

FORMAT: duration (h:mm)

Wever | Total Hours

FORMULA

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

FORMAT: duration (h:mm)

Groenewald | Total Hours

FORMULA

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

FORMAT: duration (h:mm)

Hardcastle | Admin vs Theatre

====

calculates the ratio of total theatre hours to total admin hours; allowing for insight or review.

====

```
IF({Hardcastle | Total Admin Hours} = 0, IF({Hardcastle |  
Total Theatre Hours} = 0, "NO INFORMATION", "N/A"), ROUND(({Hardcastle |  
Total Admin Hours} / {Hardcastle |  
Total Hours}) * 100) & "% vs " & ROUND(({Hardcastle |  
Total Theatre Hours} / {Hardcastle | Total Hours}) * 100) & "%")
```

Wever | Admin vs Theatre

:::::

calculates the ratio of total theatre hours to total admin hours; allowing for insight or review.

:::::

```
IF(
```

```
{Wever | Total Admin Hours} = 0,
```

```
IF(
```

```
{Wever | Total Theatre Hours} = 0,
```

```
"NO INFORMATION",
```

```
"N/A"
```

```
),
```

```
ROUND(({Wever | Total Admin Hours} / {Wever |  
Total Hours}) * 100) & "% vs " & ROUND(({Wever |  
Total Theatre Hours} / {Wever | Total Hours}) * 100) & "%"
```

```
)
```

Groenewald | Admin vs Theatre

:::::

calculates the ratio of total theatre hours to total admin hours; allowing for insight or review.

:::::

```
IF({Groenewald | Total Admin Hours} = 0,
```

```
IF({Groenewald | Total Theatre Hours} = 0,
```

```
BLANK(),
```

```
"0% vs 100%"
```

```
),
```

```
IF({Groenewald |  
Total Theatre Hours} = 0, "100% vs 0%", ROUND(({Groenewald |
```

```
Total Admin Hours} / {Groenewald |  
Total Hours}) * 100) & "% vs " & ROUND(({Groenewald |  
Total Theatre Hours} / {Groenewald | Total Hours}) * 100) & "%")  
)
```

Hardcastle | Proportion

FORMULA

```
{Hardcastle | Total Hours} / {Total Hours}
```

FORMAT: duration (h:mm)

Wever | Proportion

FORMULA

```
{Wever | Total Hours} / {Total Hours}
```

FORMAT: duration (h:mm)

Groenewald | Proportion

FORMULA

```
{Groenewald | Total Hours} / {Total Hours}
```

FORMAT: duration (h:mm)

Total Due

FORMULA

```
{Total Hours} /3600 * 134.17
```

FORMAT: currency (R)

MRH Rebate Amount Due

ROLLUP

using [MRH Rebate Amount Due](#)

with condition [MHR Payment Received](#) "yes"

FORMULA: `sum(values)`

FORMAT: currency (R)

Balance Due

FORMULA

```
{Total Due} - {MRH Rebate Amount Due}
```

Due by Hardcastle

FORMULA

```
{Hardcastle | Proportion} * {Balance Due}
```

Due by Wever

FORMULA

```
{Wever | Proportion} * {Balance Due}
```

Due by Groenewald

FORMULA

```
{Groenewald | Proportion} * {Balance Due}
```

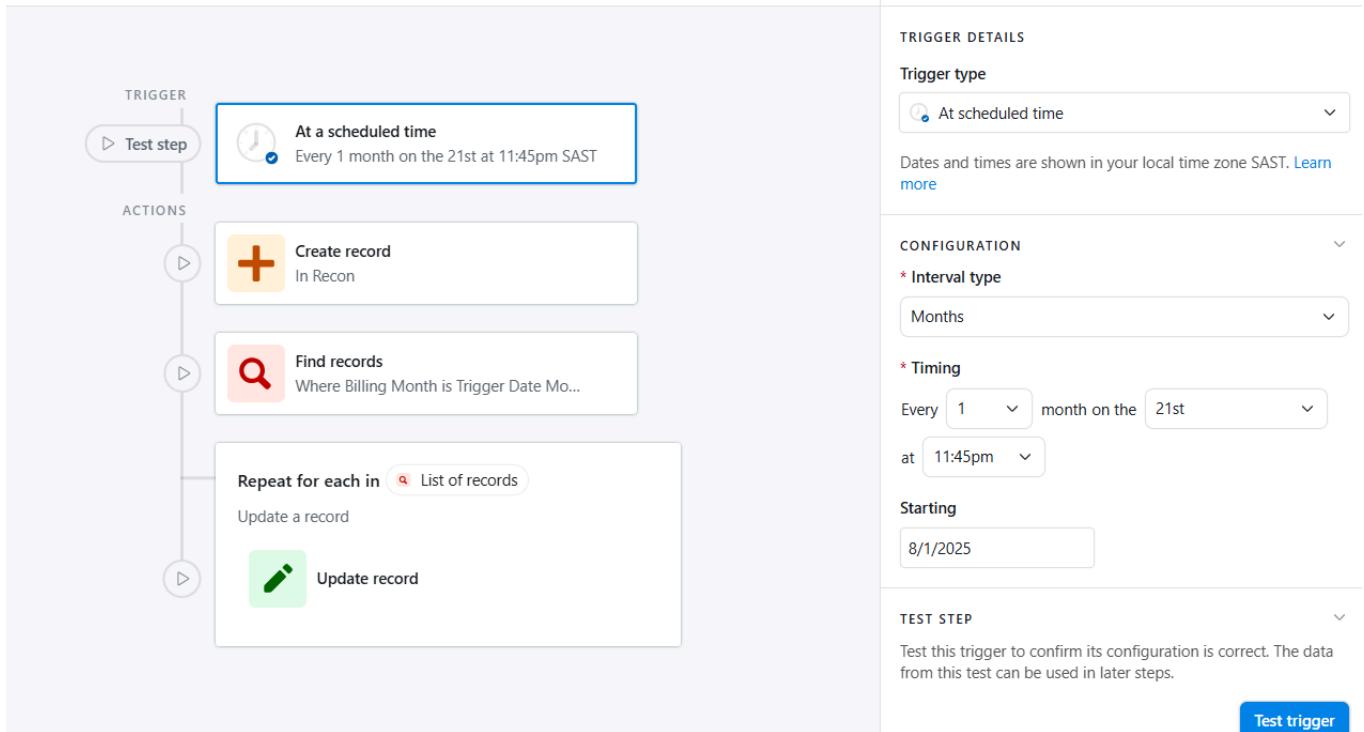
Forms

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)



Back-dated (eg. February 2025)

 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 

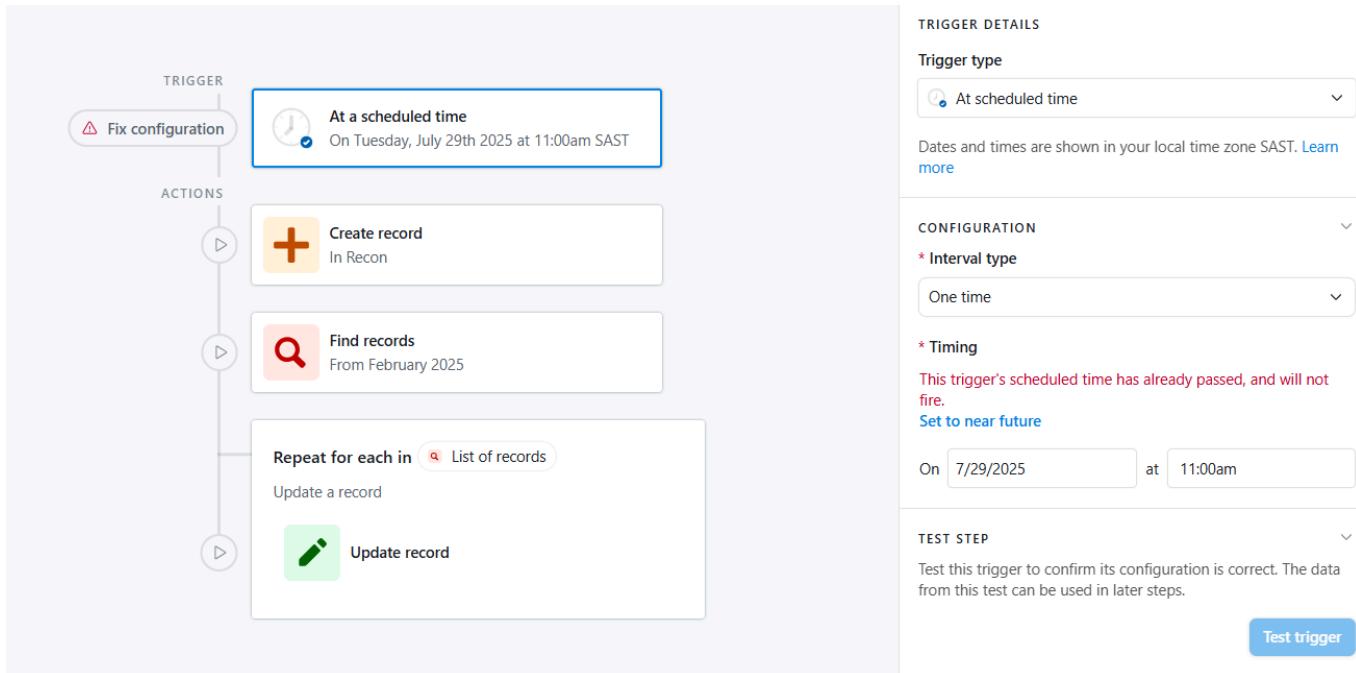
At a scheduled time, create a record, and 2 more ...

 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 the Zoho Data interface. On the left, there's a sidebar with options like 'Create new...', 'Find a view', and a list of 'Billing Periods - required for ba...'. Under 'Billing Periods', 'February 2025' is selected. The main area displays a table with columns 'Date', 'LOCATION', and 'Year'. The first row shows 'January 29, 2025' under 'Date' and '(Empty)' under 'LOCATION'. The second row shows 'January 22, 2025' under 'Date' and 'Dr Hardcastle' under 'LOCATION'. There are four rows in total. At the top right, there are filters for '12 hidden fields' and 'Filtered by Billing Month, Year'. Below the table, a message says 'Editing this filter may trigger a large number of automation runs'. A modal dialog is open, stating 'This view is locked.' with 'Unlock options' and 'Apply' buttons. The 'Apply' button is highlighted in blue. To the right of the table, there are sections for 'Overtime' and 'Queries' with a summary of 'Sum 0:00'.

End of Document

Last updated: November 06, 2025