Airtable README - Move Orthopeadics 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** <u>Location</u> **and** <u>Type of Work</u> **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 <u>Recon</u> sheet for each OR have group by this identifier in <u>Recon</u> sheet
  - can then also determine overtime on individual basis ie. X works 6h and Y 10h

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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'

)
```

Year

Type: Formula

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

used to generate a view

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
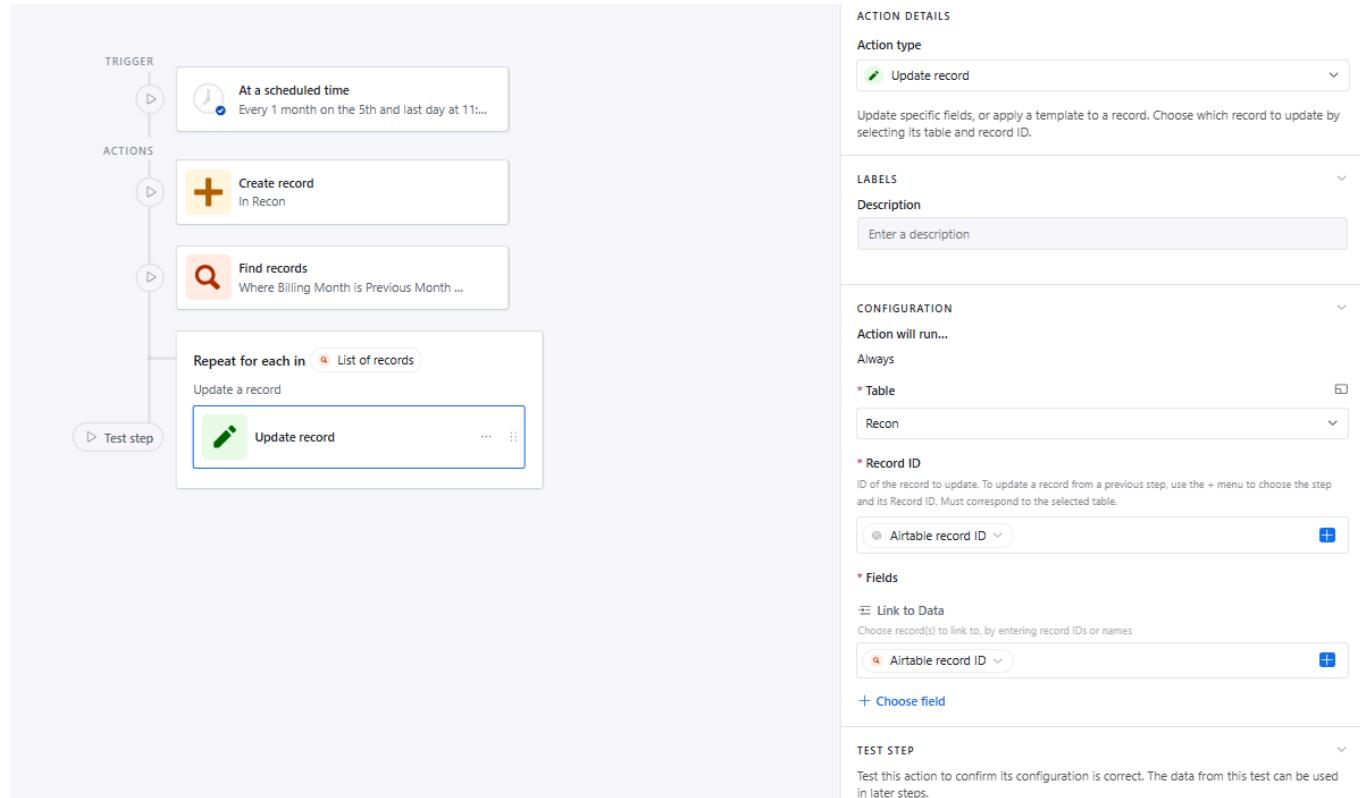
Timesheet Form

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 ...
`ON`

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

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

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

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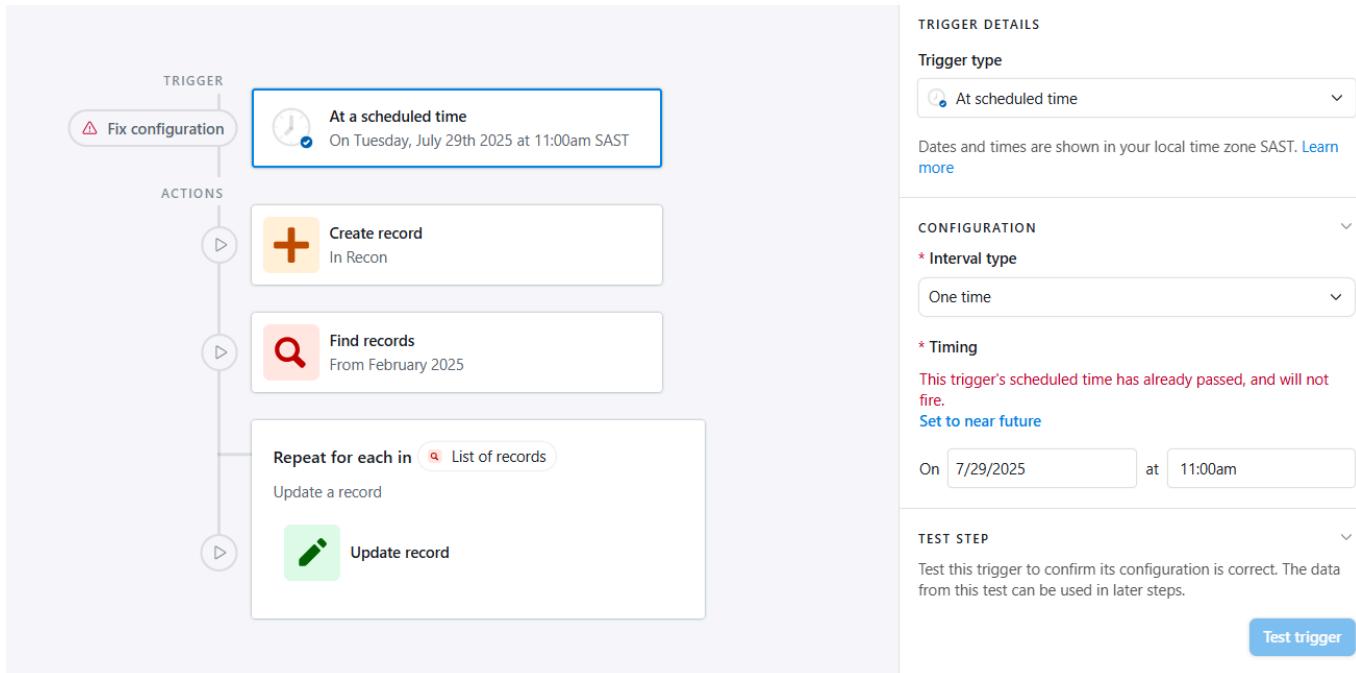
June 2025
At a scheduled time, create a record, and 2 more ...
`ON`

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

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.

Test trigger

set trigger at specific time

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

End of Document

Last updated: November 06, 2025