

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'
)
```

TRIGGER

At a scheduled time

Every 1 month on the 5th and last day at 11:...

ACTIONS

Create record

In Recon

Find records

Where Billing Month is Previous Month aka Billing Month

Repeat for each in

List of records

Update a record

Update record

Test step

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 Billing Month

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

2025 Recon Sheet

3 hidden fields

Filtered by Year

Group

Sort

Color

Share and sync

	A Trigger Date Time								
1	2025-07-27T09:00:00.058Z								
2	2025-07-29T09:00:00.098Z								
3	2025-07-29T09:00:00.133Z								
4	2025-07-29T09:00:00.137Z	March	73:20	53:00					
5	2025-07-29T09:00:00.168Z	January	43:00	12:00					
6	2025-07-29T09:00:00.228Z	April	53:00	42:00					
7	2025-07-31T21:30:00.041Z	July	17:30	12:00					
8	2025-08-21T21:45:00.035Z	August	44:30	43:30					
9	2025-09-21T21:45:38.938Z	September	21:00	17:00					
+									

In this view, show months

Where Year is 2025

+ Add condition + Add condition group

Copy from another 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

TRIGGER

At a scheduled time
Every 1 month on the 5th and last day at 11:...

ACTIONS

Create record
In Recon

Find records
Where Billing Month is Previous Month ...

Repeat for each in
List of records
Update a record

Update record

Test step

ACTION DETAILS

Action type
Update record

Update specific fields, or apply a template to a record. Choose which record to update by selecting its table and record ID.

LABELS

Description
Enter a description

CONFIGURATION

Action will run...
Always

* Table
Recon

* Record ID
ID of the record to update. To update a record from a previous step, use the + menu to choose the step and its Record ID. Must correspond to the selected table.
Airtable record ID

* Fields
Link to Data
Choose record(s) to link to, by entering record IDs or names
Airtable record ID


+ Choose field

TEST STEP


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


for back-dated Recon updates


TRIGGER


 Fix configuration

ACTIONS


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

 **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](#)

10 hidden fields

Filtered by Year, Billing Month

Grouped by 1 field

Editing this filter may trigger a large number of automation runs

In this view, show records

Where

Year

<

>

2025

⌵

⌵

and

Billing Month

is

March

⌵

⌵

+ Add condition

+ Add condition group

Copy from another view

Cancel

Apply

March 2025

▼

+ Create new...

Find a view

for back-dated Recon updates

January 2025

February 2025

March 2025

April 2025

7

March 17, 2025

8

March 19, 2025

9

March 24, 2025

10

March 26, 2025

11

March 28, 2025

12

March 31, 2025

+

LOCATION

Dr. Weaver

10

13

March 4, 2025

08H00 - 17H00

14

March 5, 2025

08H00 - 12H00

15

March 7, 2025

13H00 - 16H00

16

March 11, 2025

08H00 - 17H00

17

March 12, 2025

08H00 - 12H00

18

March 18, 2025

08H00 - 17H00

End of Document

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