

# Airtable README - Move Orthopedics Timesheets - v4

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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 **running 12th of every month**

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

The screenshot shows a trigger configuration interface. On the left, there's a sidebar with options like 'Create new...', 'Find an automation', and a list of triggers categorized by month (November 2025 - end, January 2025, February 2025, March 2025, April 2025, May 2025, June 2025, July 2025, August 2025, September 2025, October 2025). The main area is divided into 'TRIGGER' and 'ACTIONS'. The trigger is set to 'At a scheduled time: Every 1 month on the 12th at 11:45pm SAST'. The actions include 'Create record In Recon', 'Find records Where Billing Month Is Previous Month ...', and 'Update record'. A 'TEST STEP' section shows a test configuration for the trigger.

## 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
+ Create new...	<input type="checkbox"/>	Trigger Date Time	In this view, show months		Groenewald	Total ...						
Q Find a view		1 2025-07-27T09:00:00.058Z	Where	Year	=	2025		0:00		170:00		
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

$\{\text{Groenewald} \mid \text{Total Hours}\} + (1/3)*\{\text{Practise} \mid \text{Total Hours}\}) / \{\text{Total Hours}\}$

**Format:** duration (h:mm)

## Forms

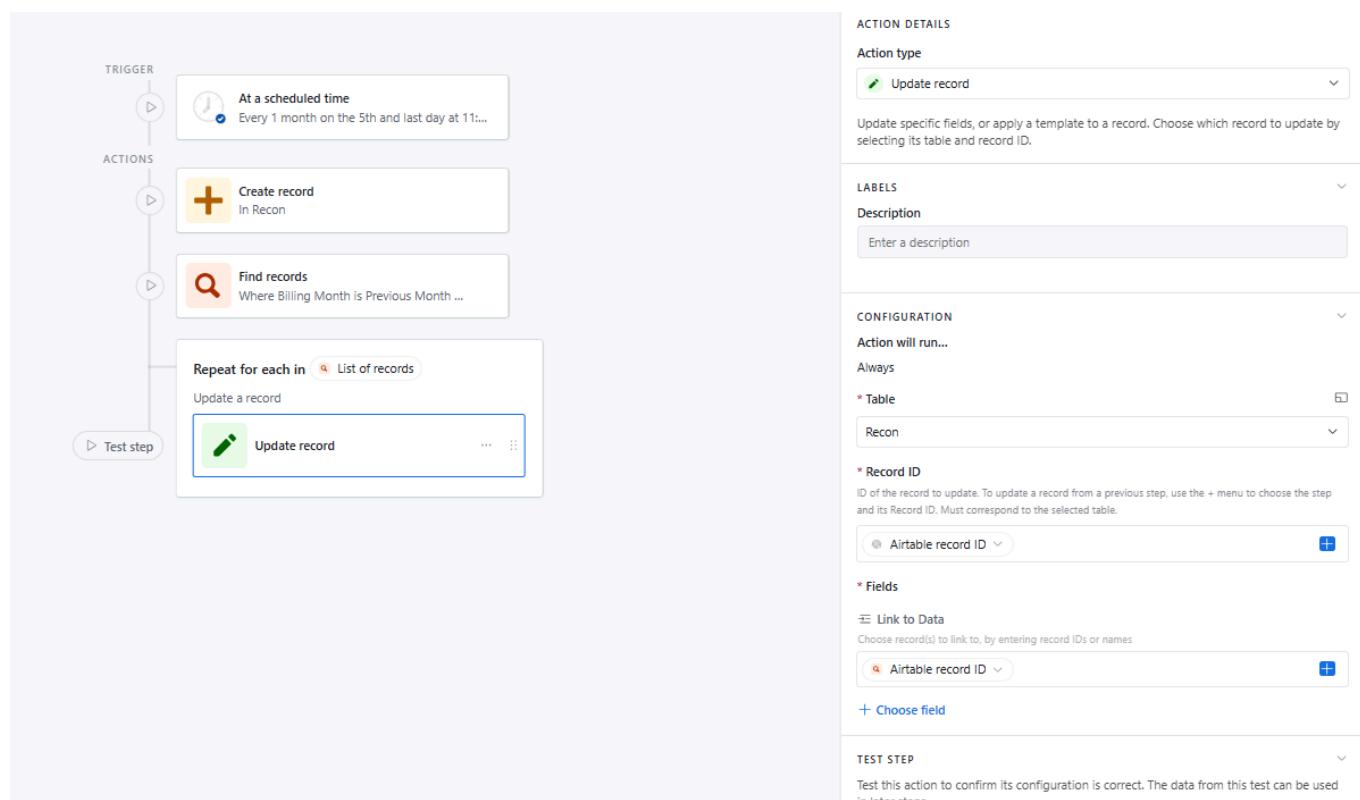
### Timesheet Form

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

## Automations

### for future Recon updates

eg. November 2025 - end



set to trigger on 12th of every month

### 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 

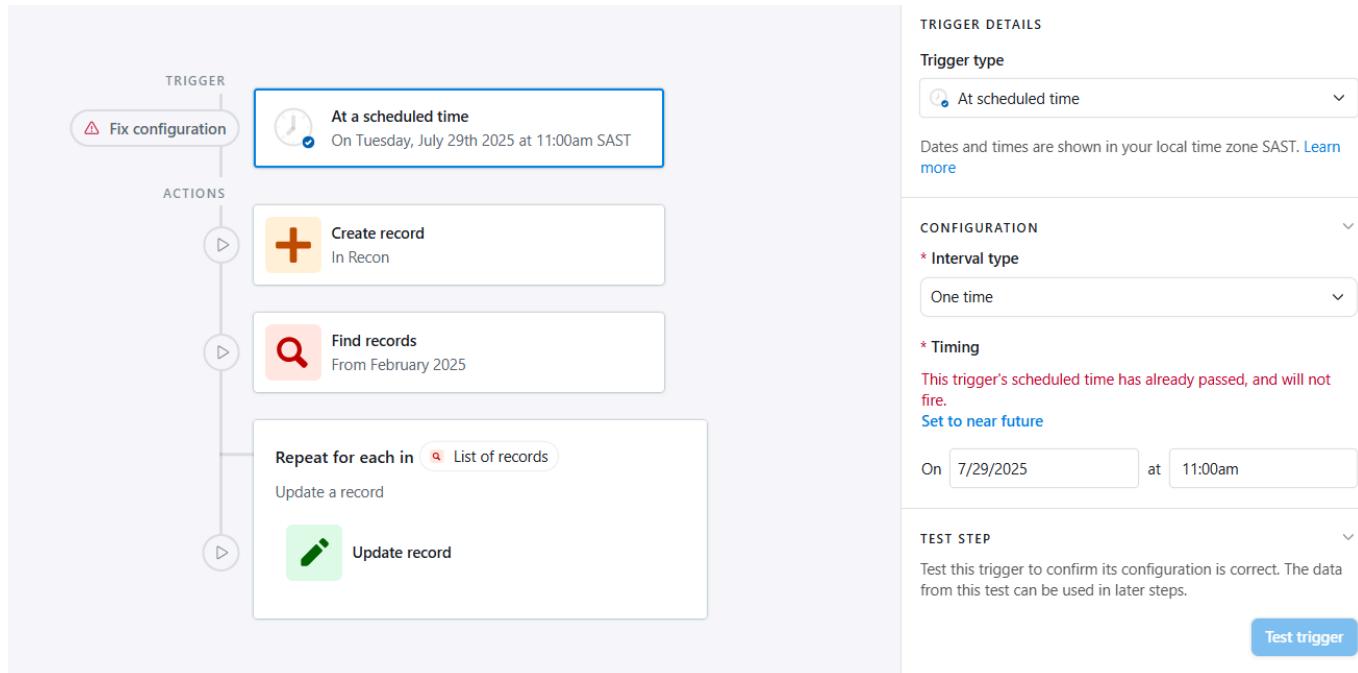
At a scheduled time, create a record, and 2 more ...

 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 filter dialog is open over the list, titled 'Editing this filter may trigger a large number of automation runs'. The filter criteria are set to 'Where Year is 2025' and 'and Billing Month is March'. There are buttons for 'Add condition', 'Add condition group', 'Copy from another view', '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.

## End of Document

*Last updated: November 11, 2025*