

# 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

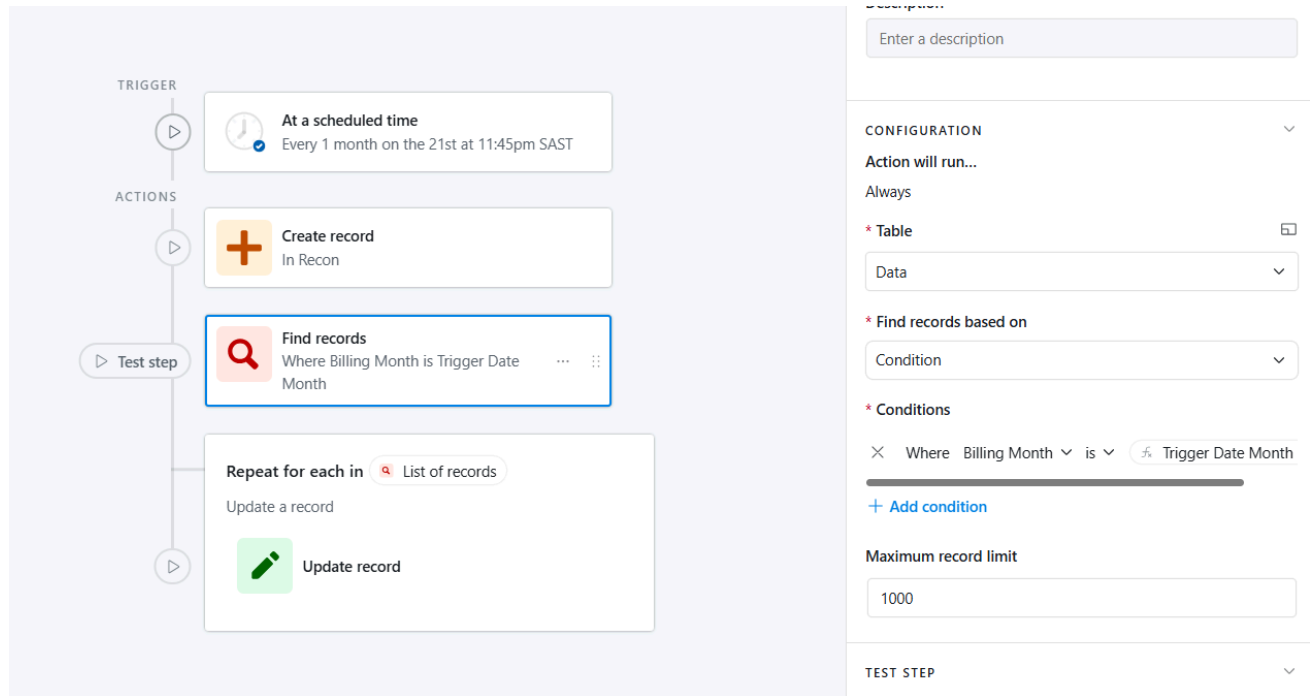
misinterpretation from my side originally

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

Data

Recon

+

Add or import

2025 Recon Sheet

3 hidden fields

Filtered by Year

Group

Sort

Color

Share and sync

|   |                          |           |  |       |       |  |                        |             |      |
|---|--------------------------|-----------|--|-------|-------|--|------------------------|-------------|------|
|   | A 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 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} + {Wever | 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 Weaver

*FORMULA*

```
{Weaver | 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)**

TRIGGER

Test step

ACTIONS

At a scheduled time

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

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.

Test trigger

Back-dated (eg. February 2025)

TRIGGER

 Fix configuration

ACTION

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

Find records

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

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

Recon

+

Add or import

12 hidden fields

Filtered by Billing Month, Year

Grouped by 1 field

Sort

Color

Share and

February 2025

+

Create new...

Find a view

Billing Periods - required for ba...

January 2025

February 2025

March 2025

April 2025

May 2025

June 2025

Date

LOCATION

(Empty)

1

1

January 29, 2025

+

LOCATION

Dr Hardcastle

20

2

January 22, 2025

3

January 22, 2025

4

January 23, 2025

OverTime

Sum 0:00

Queries

Sum 0:00

08H00 - 17H00

8:00

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.

Unlock options

Cancel

Apply

End of Document

Last updated: November 06, 2025