README - Move Orthopeadics Timesheets - v1

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.

Notice: for each variation of Location and Type of Work a new form must be submitted

> **idea for version update (and more generic)**
>
> - extract hours worked from start and stop time *(split fields and make* `Duration` *type)*
> - determine overtime based thereon
> - combine worksheets of different individuals working for same organization and use unique identifier to split
> - 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)
```

Week

SINGLE SELECT

- Week 1
- Week 2
- Week 3
- Week 4
- Week 5

deprecated

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

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

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'
)
```

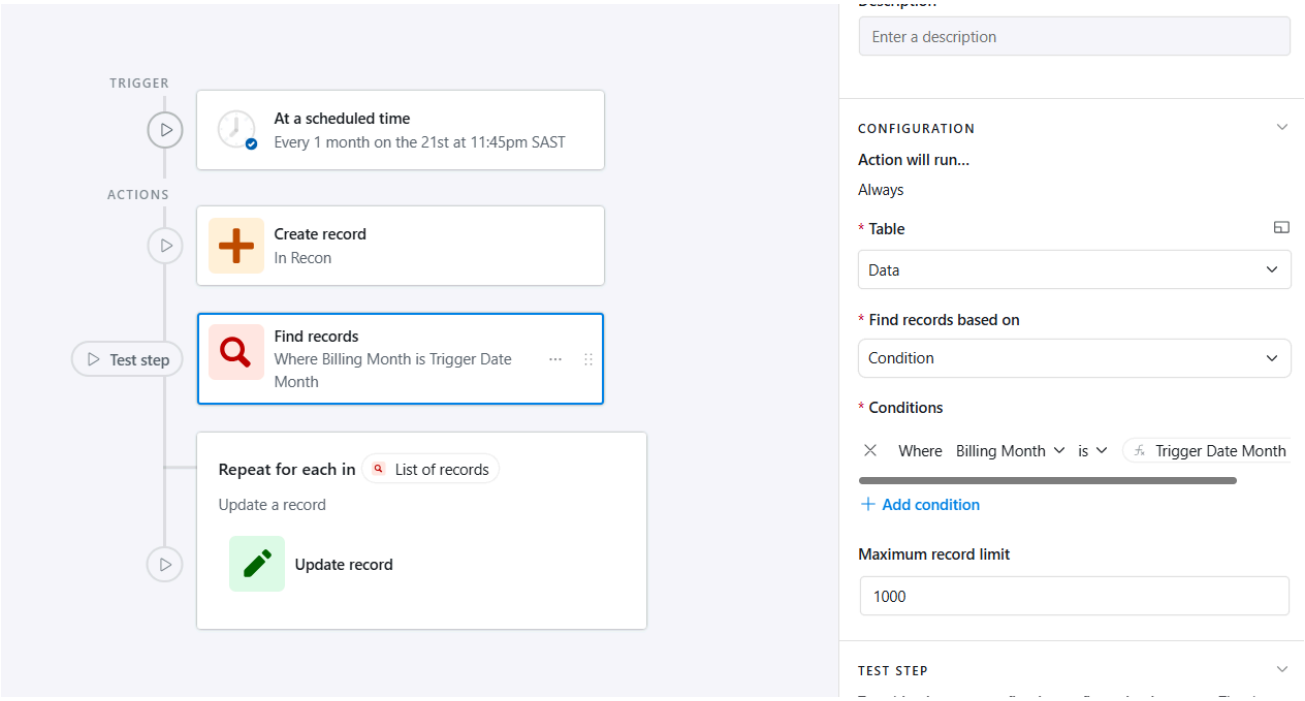
Billing Month

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(DATETIME_FORMAT({Date Created}, 'MMMM') = {Billing Month},

  'No',

  'Yes'

)
```

Recon

Trigger Date Time

(identifier)

Billing Month

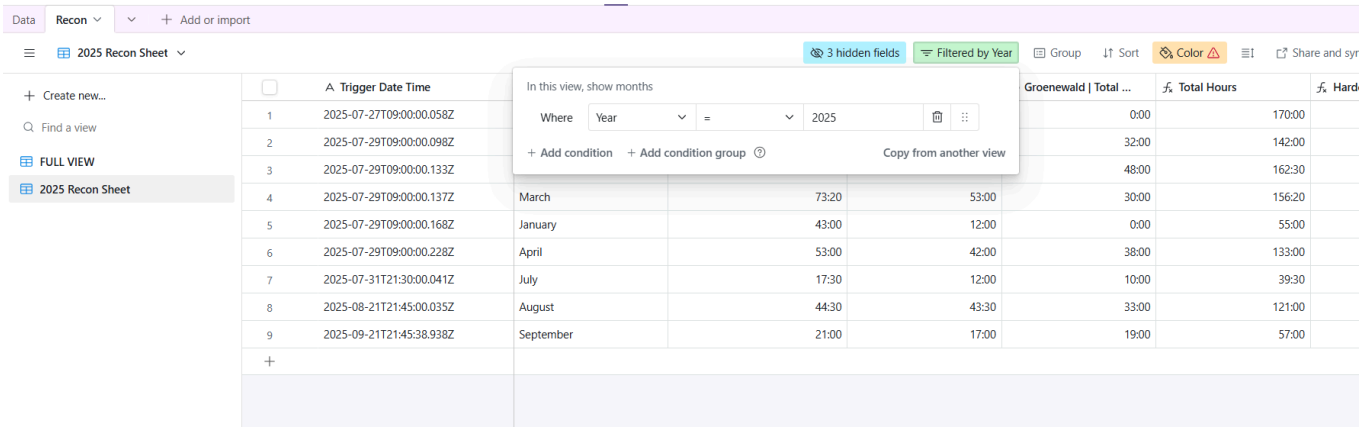
LOOKUP

Year

FORMULA

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

used to generate a view



	Trigger Date Time				Groenewald | Total ...	Total Hours
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 Hours

ROLLUP
with condition based on Location
FORMULA: `sum(values)`
FORMAT: duration (h:mm)

Wever | Total Hours

ROLLUP
with condition based on Location
FORMULA: `sum(values)`
FORMAT: duration (h:mm)

Groenewald | Total Hours

ROLLUP
with condition based on Location
FORMULA: `sum(values)`
FORMAT: duration (h:mm)

Practise | Total Hours

ROLLUP
with condition based on Location
FORMULA: `sum(values)`
FORMAT: duration (h:mm)

Total Hours

FORMULA

```
{Hardcastle | Total Hours} + {Wever | Total Hours} + {Groenewald |
 Total Hours} + {Practise | Total Hours}
```

FORMAT: duration (h:mm)

Hardcastle | Proportion

FORMULA

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

FORMAT: duration (h:mm)

Wever | Proportion

FORMULA

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

FORMAT: duration (h:mm)

Groenewald | Proportion

FORMULA

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

FORMAT: duration (h:mm)

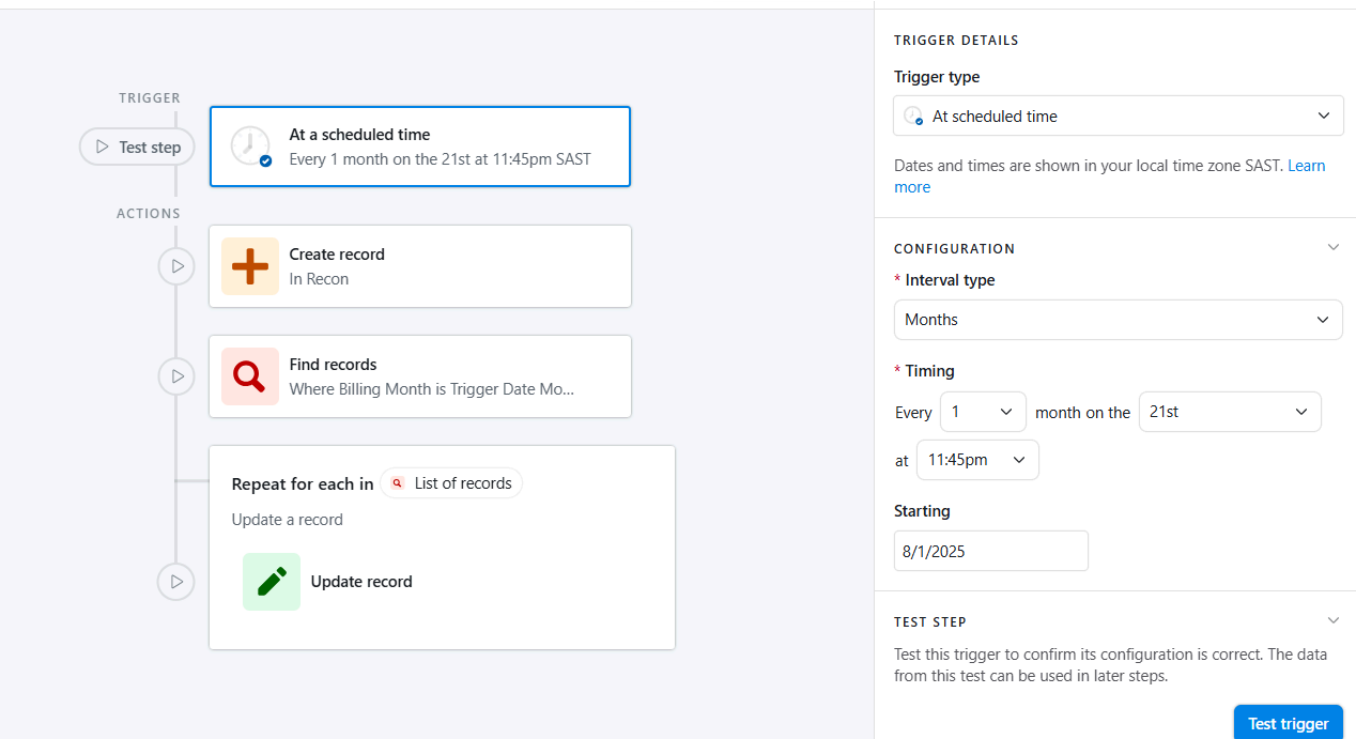
Forms

Timesheet Form

uses Date, Location, Location notes, Start-Stop Time, Hours, Overtime, Type of Work
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 ON
At a scheduled time, create a record, and 2 more ...

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

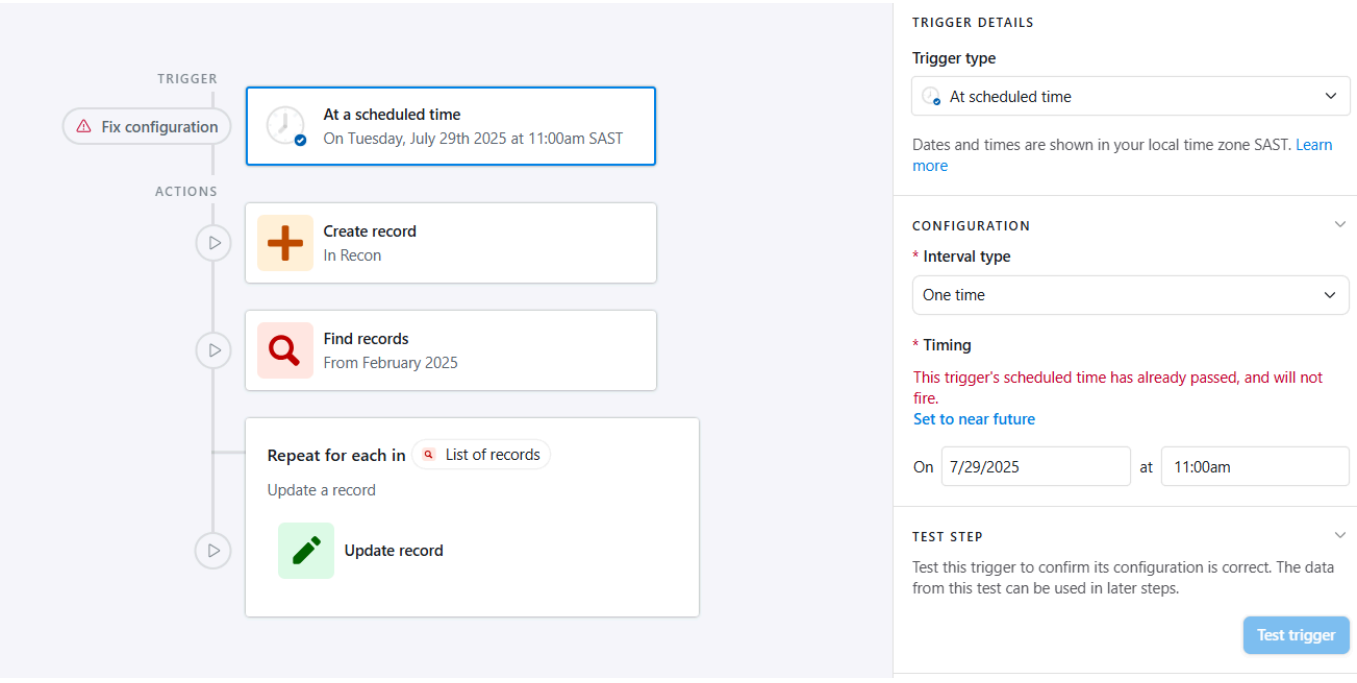
March 2025 ON
At a scheduled time, create a record, and 2 more ...

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

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

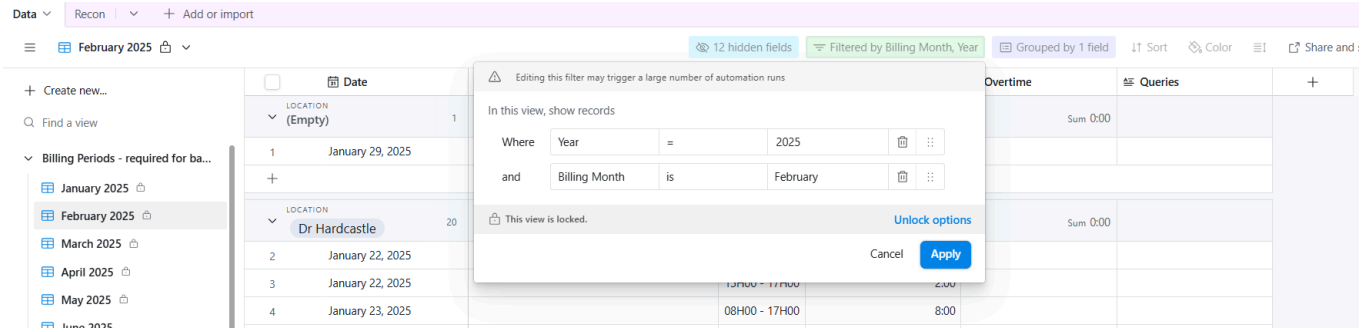
June 2025 ON
At a scheduled time, create a record, and 2 more ...

July 2025 ON
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



User Guide

How to Address

no data in "Recon" sheet

since August 2025 - end set to run on 21st of month (of Billing Month
if user enters data for a given Billing Month at some point *after* 21st said Billing Month

> **EXAMPLE**
> Date Created is September for Billing Month of August

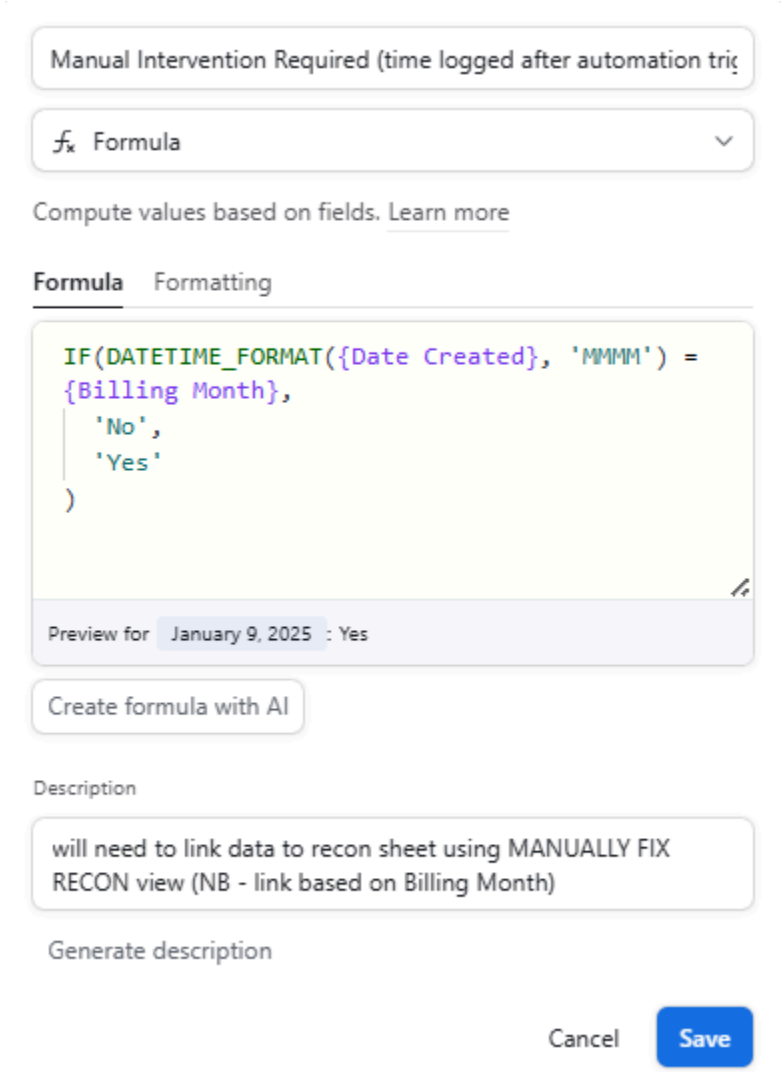
	Date	Billing Month	Total Hours	Date Created
4	August 4, 2025	August	8:00	9/4/2025
5	August 5, 2025	August	8:00	9/4/2025
6	August 6, 2025	August	4:00	9/4/2025
7	August 6, 2025	August	2:00	9/4/2025
8	August 6, 2025	August	3:00	9/4/2025
9	August 7, 2025	August	8:00	9/4/2025
10	August 8, 2025	August	5:00	9/4/2025
11	August 8, 2025	August	2:00	9/4/2025
12	August 11, 2025	August	8:00	9/4/2025
13	August 12, 2025	August	8:00	9/4/2025
14	August 13, 2025	August	4:00	9/4/2025
15	August 13, 2025	August	2:00	9/4/2025
16	August 13, 2025	August	3:00	9/4/2025
17	August 14, 2025	August	8:00	9/4/2025
18	August 15, 2025	August	3:30	9/4/2025
19	August 15, 2025	August	4:30	9/4/2025
20	August 18, 2025	August	8:00	9/4/2025
21	August 19, 2025	August	8:00	9/4/2025
22	August 20, 2025	August	4:00	9/4/2025
23	August 20, 2025	August	2:00	9/4/2025
24	August 20, 2025	August	3:00	9/4/2025
25	August 21, 2025	August	8:00	9/4/2025

then there will be no data for automation to pull over and will have to refer to [how to use to]

manually link data to recon sheet

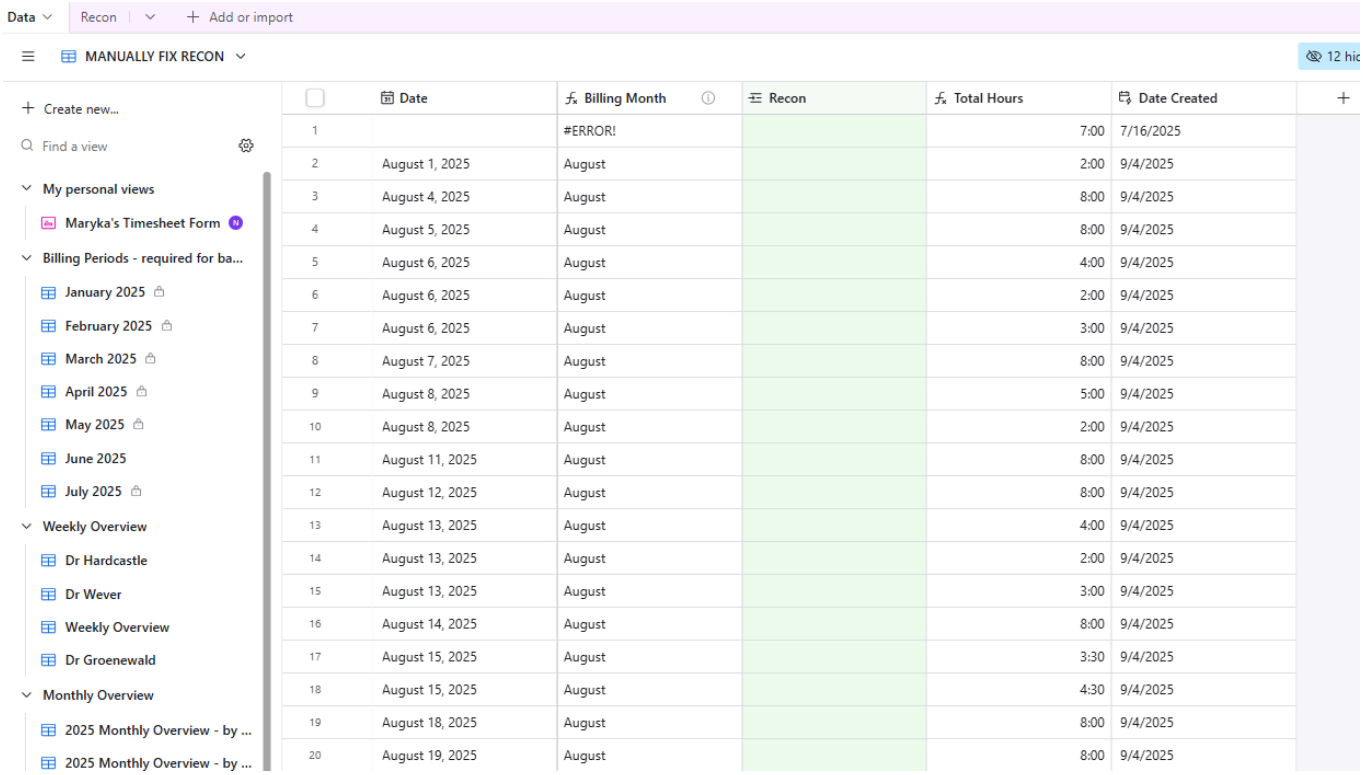
Date	Billing Month	Total Hours	Date Created
June 25, 2025	July	2:00	6/27/2025
June 26, 2025	July	8:00	6/27/2025
	#ERROR!	7:00	7/16/2025
June 27, 2025	July	7:30	7/18/2025
August 1, 2025	August	5:00	9/4/2025
August 1, 2025	August	2:00	9/4/2025
August 4, 2025	August	8:00	9/4/2025
August 5, 2025	August	8:00	9/4/2025
August 6, 2025	August	4:00	9/4/2025
August 6, 2025	August	2:00	9/4/2025
August 6, 2025	August	3:00	9/4/2025
August 7, 2025	August	8:00	9/4/2025
August 8, 2025	August	5:00	9/4/2025
August 8, 2025	August	2:00	9/4/2025
August 11, 2025	August	8:00	9/4/2025
August 12, 2025	August	8:00	9/4/2025
August 13, 2025	August	4:00	9/4/2025
August 13, 2025	August	2:00	9/4/2025
August 13, 2025	August	3:00	9/4/2025
August 14, 2025	August	8:00	9/4/2025
August 15, 2025	August	3:30	9/4/2025
August 15, 2025	August	4:30	9/4/2025
Add... 18, 2025	August	8:00	9/4/2025

may be because time logged after automation trigger



how to use to manually link data to recon sheet

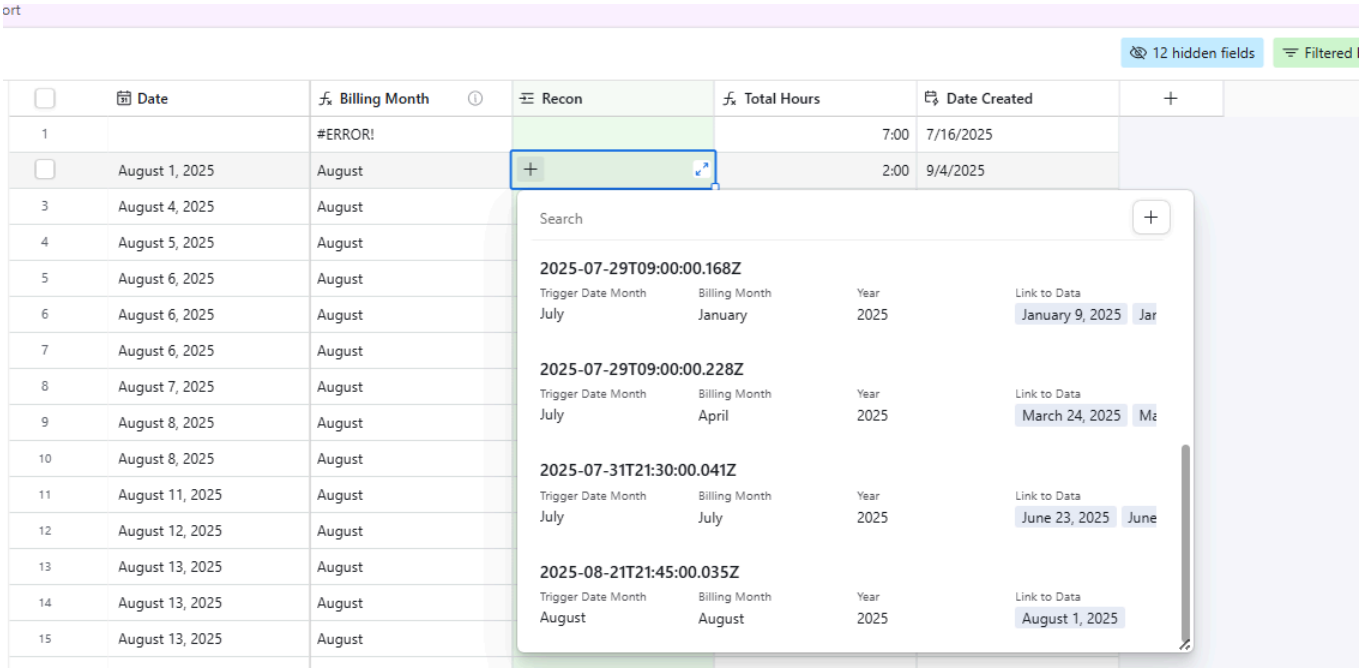
use view `MANUALLY FIX RECON`



	Date	Billing Month	Recon	Total Hours	Date Created
1		#ERROR!		7:00	7/16/2025
2	August 1, 2025	August		2:00	9/4/2025
3	August 4, 2025	August		8:00	9/4/2025
4	August 5, 2025	August		8:00	9/4/2025
5	August 6, 2025	August		4:00	9/4/2025
6	August 6, 2025	August		2:00	9/4/2025
7	August 6, 2025	August		3:00	9/4/2025
8	August 7, 2025	August		8:00	9/4/2025
9	August 8, 2025	August		5:00	9/4/2025
10	August 8, 2025	August		2:00	9/4/2025
11	August 11, 2025	August		8:00	9/4/2025
12	August 12, 2025	August		8:00	9/4/2025
13	August 13, 2025	August		4:00	9/4/2025
14	August 13, 2025	August		2:00	9/4/2025
15	August 13, 2025	August		3:00	9/4/2025
16	August 14, 2025	August		8:00	9/4/2025
17	August 15, 2025	August		3:30	9/4/2025
18	August 15, 2025	August		4:30	9/4/2025
19	August 18, 2025	August		8:00	9/4/2025
20	August 19, 2025	August		8:00	9/4/2025

based on Billing Month select corresponding entry from Recon

NOTICE: an entry will be made after 21st of each month (by automation August 2025 - end, otherwise have to create own in Recon)



	Date	Billing Month	Recon	Total Hours	Date Created
1		#ERROR!		7:00	7/16/2025
	August 1, 2025	August		2:00	9/4/2025
3	August 4, 2025	August			
4	August 5, 2025	August			
5	August 6, 2025	August			
6	August 6, 2025	August			
7	August 6, 2025	August			
8	August 7, 2025	August			
9	August 8, 2025	August			
10	August 8, 2025	August			
11	August 11, 2025	August			
12	August 12, 2025	August			
13	August 13, 2025	August			
14	August 13, 2025	August			
15	August 13, 2025	August			

then pull this through to all matching Billing Month entries

	Date	Billing Month	Recon	Total Hours	Date Created
177	August 6, 2025	August	2025-08-21T21:45:00.035Z	2:00	9/4/2025
178	August 6, 2025	August	2025-08-21T21:45:00.035Z	3:00	9/4/2025
179	August 7, 2025	August	2025-08-21T21:45:00.035Z	8:00	9/4/2025
180	August 8, 2025	August	2025-08-21T21:45:00.035Z	5:00	9/4/2025
181	August 8, 2025	August	2025-08-21T21:45:00.035Z	2:00	9/4/2025
182	August 11, 2025	August	2025-08-21T21:45:00.035Z	8:00	9/4/2025
183	August 12, 2025	August	2025-08-21T21:45:00.035Z	8:00	9/4/2025
184	August 13, 2025	August	2025-08-21T21:45:00.035Z	4:00	9/4/2025
185	August 13, 2025	August	2025-08-21T21:45:00.035Z	2:00	9/4/2025
186	August 13, 2025	August	2025-08-21T21:45:00.035Z	3:00	9/4/2025
187	August 14, 2025	August	2025-08-21T21:45:00.035Z	8:00	9/4/2025
188	August 15, 2025	August	2025-08-21T21:45:00.035Z	3:30	9/4/2025
189	August 15, 2025	August	2025-08-21T21:45:00.035Z	4:30	9/4/2025
190	August 18, 2025	August	2025-08-21T21:45:00.035Z	8:00	9/4/2025
191	August 19, 2025	August	2025-08-21T21:45:00.035Z	8:00	9/4/2025
192	August 20, 2025	August	2025-08-21T21:45:00.035Z	4:00	9/4/2025
193	August 20, 2025	August	2025-08-21T21:45:00.035Z	2:00	9/4/2025
194	August 20, 2025	August	2025-08-21T21:45:00.035Z	3:00	9/4/2025
	August 21, 2025	August	2025-08-21T21:45:00.035Z	8:00	9/4/2025
196	August 22, 2025	September		5:00	9/4/2025
197	August 22, 2025	September		3:00	9/4/2025
198	August 25, 2025	September		8:00	9/4/2025