

# Airtable README - Nubis Team Feedback

## Nubis Team 2-Month Feedback System

*(Designed in Notion)*

### Overview

This system enables **bi-monthly team check-ins** and automatically aggregates responses into a **retro Notion Retro Summary** for leadership review.

It consists of two linked tables and one key automation.

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### Tables

#### Nubis Team | 2 Month Check-In

##### Fields Included in Form:

- [Name](#)
- [How are you feeling overall at work right now?](#)
- [How would you rate Nubis' performance as a business over the last 2 months?](#)
- [What helped you work faster, better, or smarter?](#)
- [What slowed you down or frustrated you?](#)
- [One improvement you'd like to see?](#)
- [One action you think Nubis should take?](#)
- [Team check-in Do you feel you're supported by the team?](#)
- [Tell us why?](#)
- [Anything else you'd like to share?](#)

#### Name

**Type:** Single line text

#### Date Created

**Type:** Date

## Period

**Type:** Formula

Determined using [Date Created](#)

Feedback from Carla: "ASSUME FOR MOST RECENT TWO MONTHS PERIOD"

```
CONCATENATE(  
  DATETIME_FORMAT(DATEADD({Date Created}, -2, 'month'), 'MMMM YYYY'),  
  ' - ',  
  DATETIME_FORMAT(DATEADD({Date Created}, -1, 'month'), 'MMMM YYYY')  
)
```

**Description:** Returns the two most recent full months before the month of *Date Created*, formatted as Month YYYY – Month YYYY

Used to link to [Nubis Team 2 Month Retro Summary](#).

## Manual Period Override

**Type:** Single line text

**NOTE:** Crucial that this uses the **same format** as [Period](#) to ensure correct grouping in [Nubis Team 2 Month Retro Summary](#).

**Description:** Use this to set the "Period" if the formula-based calculation is incorrect (e.g., late submission)

## How are you feeling overall at work right now?

**Type:** Score (1–10)

## How would you rate Nubis' performance as a business over the last 2 months?

**Type:** Score (1–10)

## What helped you work faster, better, or smarter?

**Type:** Long text

## What slowed you down or frustrated you?

**Type:** Long text

## One improvement you'd like to see?

**Type:** Long text

**One action you think Nubis should take?**

**Type:** Long text

**Do you feel you’re supported by the team?**

**Type:** Single select — Yes / No / Sometimes

**Numeric Feeling of Support**

**Type:** Formula

```
IF({6. Team check-in: Do you feel you’re supported by the team?} = "Yes", 10,
  IF({6. Team check-in: Do you feel you’re supported by the team?} = "No", 0,
    5)
)
```

**Description:** Returns 10 if "Yes", 0 if "No", 5 otherwise (assumes "Sometimes")

Required for averaging in [Nubis Team 2 Month Retro Summary](#)

**Tell us why?**

**Type:** Long text

**Anything else you’d like to share?**

**Type:** Long text

**Link to Nubis Team | 2 Month Retro Summary**

**Type:** Link (to [Nubis Team 2 Month Retro Summary](#))

Populated by automation: [Automatically Link to Nubis Team 2 Month Retro Summary](#)

Triggered when [Period](#) or [Manual Period Override](#) is updated

**NOTE:** Not allowed to link to multiple records

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**Nubis Team | 2 Month Retro Summary**

**Nubis Team | 2 Month Check-In 2**

**Type:** Link (back to [Nubis Team 2 Month Check-In](#))

Populated by automation: [Automatically Link to Nubis Team 2 Month Retro Summary](#)

**NOTE:** Allowed to link to **multiple records**

## Average Overall Feeling

**Type:** Rollup of [How are you feeling overall at work right now?](#)

```
IF(values, AVERAGE(values))
```

## What Helped Faster, Better or Smarter Work

**Type:** Lookup of [What helped you work faster, better, or smarter?](#)

## Summarised: What Helped Faster, Better or Smarter Work & Average Overall Feeling

*(AI-generated summary combining all insights from [What Helped Faster, Better or Smarter Work](#) and [Average Overall Feeling](#))*

## What Frustrated or Slowed Down Work

**Type:** Lookup of [What slowed you down or frustrated you?](#)

## Summarised: What Frustrated or Slowed Down Work & Average Overall Feeling

*(AI-generated summary combining all insights from [What Frustrated or Slowed Down Work](#) and [Average Overall Feeling](#))*

## Average Nubis Performance

**Type:** Rollup of [How would you rate Nubis' performance as a business over the last 2 months?](#)

```
IF(values, AVERAGE(values))
```

## Improvements Like to See

**Type:** Lookup of [5. Looking forward to the next 2 months...5.1 One improvement you'd like to see?](#)

## Summarised: Improvements Like to See & Average Nubis Performance

(AI-generated summary combining all insights from [Improvements Like to See](#) and [Average Nubis Performance](#))

## Suggested Action for Nubis

Type: Lookup of [5.2 One action you think Nubis should take?](#)

## Summarised: Suggested Action for Nubis & Average Nubis Performance

(AI-generated summary combining all insights from [Suggested Action for Nubis](#) and [Average Nubis Performance](#))

## Average Feeling of Support

Type: Rollup of [Numeric Feeling of Support](#)

```
IF(values, AVERAGE(values))
```

## Why Feeling Un-/Supported

Type: Lookup of [Tell us why?](#)

## Summarised: Why Feeling Un-/Supported & Average Feeling of Support

(AI-generated summary combining all insights from [Why Feeling Un-/Supported](#) and [Average Feeling of Support](#))

## Anything Else

Type: Lookup of [Anything else you'd like to share?](#)

## Summarised: Anything Else

(AI-generated summary combining all insights from [Anything Else](#))

## Summarised: Overall

(AI-generated summary combining all insights)

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# Automations

## Automatically Link to Nubis Team | 2 Month Retro Summary

### How it works:

If no record exists in [Nubis Team 2 Month Retro Summary](#) with a name matching the value in [Period](#) (or [Manual Period Override](#)), a **new record is created**.

Thus, retro summaries are generated **on-demand** as check-ins are submitted.

### TRIGGER: When "Period" or "Manual Period Override" is updated

TRIGGER

Test step

When a record is updated  
Period and Manual Period Override

ACTIONS

If Manual Period Override is empty

Update a record

Update record using "Period"

Otherwise if Manual Period Override is not empty

Update a record

Update record using "Manual Period Override"

+ Add condition

TRIGGER DETAILS

Trigger type

When record updated

This trigger will fire when a record is updated in a table. This does not include the creation of the record. [Learn more](#)

CONFIGURATION

\* Table

Nubis Team | 2 Month Check-In

View

Optionally, select a view to only watch updates in that view.

FULL VIEW

\* Fields

Updates to the selected fields will fire the trigger. When watching all fields, fields created in the future will also be watched.

Period Manual Period Override

Watching 2 fields

TEST STEP

Test this trigger to confirm its configuration is correct. The data

### CONDITION: If "Manual Period Override" is empty

Diagram illustrating a workflow configuration for updating a record based on whether the Manual Period Override is empty or not.

**TRIGGER:** When a record is updated (Period and Manual Period Override)

**ACTIONS:**

- If Manual Period Override is empty:** Update a record using "Period".
- Otherwise if Manual Period Override is not empty:** Update a record using "Manual Period Override".

**Configuration Panel:**

- Labels:** Description: using "Period"
- Configuration:**
  - Action will run...** If Manual Period Override is empty
  - \* Table:** Nubis Team | 2 Month Check-In
  - \* Record ID:** Airtable record ID
  - \* Fields:** Link to Nubis Team | 2 Month Retro Summary (Choose record(s) to link to, by entering record IDs or names: Period)

→ Update field [Link to Nubis Team 2 Month Retro Summary](#) with value from [Period](#)

## CONDITION: If "Manual Period Override" is **not** empty

Diagram illustrating a workflow configuration for updating a record based on whether the Manual Period Override is empty or not.

**TRIGGER:** When a record is updated (Period and Manual Period Override)

**ACTIONS:**

- If Manual Period Override is empty:** Update a record using "Period".
- Otherwise if Manual Period Override is not empty:** Update a record using "Manual Period Override".

**Configuration Panel:**

- Labels:** Description: using "Manual Period Override"
- Configuration:**
  - Action will run...** If Manual Period Override is not empty
  - \* Table:** Nubis Team | 2 Month Check-In
  - \* Record ID:** Airtable record ID
  - \* Fields:** Link to Nubis Team | 2 Month Retro Summary (Choose record(s) to link to, by entering record IDs or names: Manual Period Override)

→ Update field [Link to Nubis Team 2 Month Retro Summary](#) with value from [Manual Period Override](#)

**End of Document**

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