# Airtable README Maintenance Guide - Move Orthopeadics Team Feedback - v2

Below is a revised and more polished version of your Airtable base setup explanation for the Obsidian document. The content retains **all original information** and **media** as requested, while improving clarity, structure, and flow to make it more well-rounded. I've refined the language, standardized formatting, corrected typos, and organized sections for better readability without altering the core details or images.

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# Airtable Base Setup for Feedback and Retrospectives

## Terminology

- **Period** refers to **Month Year** (e.g., August 2025).
- **Records** are individual submissions or entries in a table.
- **Summary Tables** aggregate feedback for individuals, teams, or the organization.

## Important Notes

- **View Customization**: You can group views in any way that suits your workflow, except for the **locked views** in the **Team Structure** table, which must remain unchanged.
- **Date Created vs. Feedback Period**: The **Date Created** field may not align with the period for which feedback is given (e.g., feedback for August 2025 submitted in September 2025). Therefore, the **Month Year (from Date Created)** field is unreliable for grouping feedback.
- **Relationship Complexity**:
  - The relationship between the **Monthly 360 Feedback** and **Monthly 360 Feedback: Summary** tables is complex. A single record in **Monthly 360 Feedback: Summary** can represent **two levels of summaries**: one for an individual and one for the team.
  - In contrast, **Monthly Full Team Retro: Summary** and **Quarterly Full Team Retro: Summary** tables link each record to either a team or organizational summary, making their relationships simpler.
  - Each record in **Monthly 360 Feedback**, **Monthly Full Team Retro**, and **Quarterly Full Team Retro** links to their respective summary tables in **two distinct ways**, but only **Monthly 360 Feedback** links a single record to **multiple records** in its summary table.

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# FAQ

## How do I add or remove team members?

See [Updating Team Structure](#).

## How do I update the 'Year' or 'Name' dropdowns in forms?

See [Configuring Dropdowns](#) for **Year Dropdown Limitation** or **Name Dropdown Selection**.

## How do I understand the naming conventions and their links to summary tables?

See [Explanation of Record Naming and Summary Table Links](#).

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# Solutions

## Explanation of Record Naming and Summary Table Links

### `Monthly 360 Feedback` Table

Records in this table capture feedback submitted for individuals and teams. The naming conventions and automation logic are as follows:

### Record Naming

`Name : Month Year` represents the **name of the person who submitted the form** and the **month/year** for which feedback is given

`Month Year : Team : Team Member Receiving Feedback` represents the **period**, **team**, and **name of the person receiving feedback**
used to populates **two linked record fields** in the **Monthly 360 Feedback: Summary** table:
- for `Personal Summary`
- for `Team Summary`

### Automations

> ⚠️ **if automations fail, manually update links as described in** [Verifying and Correcting Record Links](#)**.**

**Link to Monthly Full Team Retro Summary**

*Personal-Level Feedback*
*when a record is submitted:*

1. `for Personal Summary` field is populated with the value from `Month Year : Team : Team Member Receiving Feedback`.
   this **creates a new record** in the *Monthly 360 Feedback: Summary* table if none exists for that individual and period, or **links to an existing record** if one already exists

   > so that feedback for the same individual in the same period is grouped in *Monthly 360 Feedback: Summary* under `Name Month Year : Team : Team Member` and **AI-generated summary** is created as `Individuals' Feedback Retro`

*Team-Level Feedback*
*when a record is submitted:*

1. **all records** in **Monthly 360 Feedback** with the same **team** and **period** ( `Month Year : Team` ) are identified
2. `for Team Summary` field is populated with all matching `Month Year : Team : Team Member` records

   > so that all feedback for a given team and period is grouped in *Monthly 360 Feedback: Summary* under `Name Month Year : Team : Team Member` and **AI-generated summary** is created as `Team Feedback Retro`

   > ⚡ only the **last-submitted record** for a team/period will include links to **all prior feedback** for that team/period
   >
   > addressed using additional autoamtion [Link to Monthly 360 Feedback Summary — retrospective](#)

## Link to Monthly 360 Feedback: Summary — retrospective

*Team-Level Feedback*
*when a record is submitted:*

1. finds **all existing records** for the same **team** and **period**
2. updates the `for Team Summary` field in **all prior records** to include the new record

   > so that each record in *Monthly 360 Feedback: Summary* for a given team/period is linked to **all feedback** for that team/period, ensuring consistency therefore record can now be used to generate a complete `Team Feedback Retro`

## Team-Specific Views

- Any record for a given team and period can generate **nearly identical** team-level summaries. Slight variations may occur due to AI processing.
  (*ideally, views would display **only one record per team/period** to avoid redundancy*)



## Individual-Specific Views

- Each record generates a **unique personal summary** for the individual receiving feedback.



## Holistic Overview

- Combining **personal feedback** and **team context** produces a **holistic overview** per individual (e.g., "your feedback + team context").
- This differs from a **team-wide retro**, which aggregates all team feedback; for a true team-wide retro, refer to methodology used in `Monthly Full Team Retro` Table



## `Monthly Full Team Retro` **Table**

This table captures team and organizational feedback submitted monthly.

## Record Naming

`Name : Month Year : Team` represents the **name of the person who submitted the form**, the **period**, and the **team** they are part of

`Month Year : Team` represents the **period** and **team** for which feedback is given

`Month Year : Organization` represents the **period** and **organization**

## Automations

## Link to Monthly Full Team Retro Summary

*Team Level Feedback*
*when form is submitted:*

1. `for Team Summary` field is populated with the value from `Month Year : Team`
   **creates a new record** in the *Monthly Full Team Retro: Summary* table if none exists for that team/period, or **links to an existing record**.

   such that all records for the same team and period are grouped under one record in the *Monthly Full Team Retro: Summary* table.

*Organizational Level*
*when form is submitted:*

1. `for Organisational Summary` field is populated with the value from `Month Year : Organization`

   **creates a new record** in the *Monthly Full Team Retro: Summary*table if none exists for that organization/period, or **links to an existing record**

   such that all records for the same organization and period are grouped under one record in the *Monthly Full Team Retro: Summary* table

> 〝〞 **Key Implications**
>
> **Team Specific" views**
>
> (e.g., "-- Team")
> for a given period and team



> **Use the "Organizational" view**

for a given period



## `Quarterly Full Team Retro` Table

This table captures team and organizational feedback submitted quarterly.

## Record Naming

`Name : Team : Quarter` represents the **name of the person who submitted the form**, their **team**, and the **quarter** for which feedback is given

`Year : Quarter : Team` represents the **year**, **quarter**, and **team**

`Year : Quarter : Organization` represents the **year**, **quarter**, and **organization**

## Automations

### Linking to Quarterly Full Team Retro: Summary

*Team Level Summary*
*when form is submitted:*

1. `for Team Summary` field is populated with the value from `Year : Quarter : Team`.
   **creates a new record** in the *Quarterly Full Team Retro: Summary* table if none exists for that team/period, or **links to an existing record**

   > such that all records for the same team and quarter are grouped under one record in the *Quarterly Full Team Retro: Summary* table.

*Organizational Level*
*when form is submitted:*

1. for `Organisational Summary` field is populated with the value from `Year : Quarter : Organization`

   **creates a new record** in the *Quarterly Full Team Retro: Summary* table if none exists for that organization/period, or **links to an existing record**

   > such that all records for the same organization and quarter are grouped under one record in the *Quarterly Full Team Retro: Summary* table.

   ## 🔖 Key Implications

   ## Team Specific" views

   (e.g., "-- Team")
   for a given period and team

   

   ## Use the "Organizational" view

   for a given period

   

# Team Structure Table

The **Team Structure** table centralizes team member information and controls which names appear in dropdowns for forms in other tables.

## Fields

- `Team Members Name` : The name of the team member.
- `Team(s)` : The team(s) the member belongs to.
- `Participants Involvement` : Defines the forms (e.g., Monthly Team Retro, Monthly 360 Feedback, Quarterly Team Retro) where the member's name appears.
- `Active Member` : A "Yes" or "No" field that determines whether the member's name appears in dropdowns via the **Active Participants** view.

## Views and Form Integration

The **Active Participants** view filters names based on the **Active Member** field and is used to populate dropdowns in the following forms:

1. **Monthly 360 Feedback**
   - Form: *MOVE Orthopaedics MONTHLY Team Feedback*
   - Associated Table: **Monthly 360 Feedback**

- View:

**MOVE Orthopaedics MONTHLY Team Feedback**

Now let's give each other feedback. Please take some time to complete the form below for yourself and then for the person that you are giving feedback to.

⋮⋮  ≡ Name ⌄                          Required ⬤  👁

**Name**

Add some help text

⊞ + Add

🟢 Limit record selection to a view

⊞ Monthly 360 Feedback View                    ⌄

ⓘ Record selection will be limited to records from Monthly 360 Feedback View

◯ Show field only when conditions are met

2. **Monthly Full Team Retro**
   - Form: *MOVE Orthopaedics MONTHLY Team Retro*
   - Associated Table: **Monthly Full Team Retro**

- View:

**MOVE Orthopaedics MONTHLY Team Retro**

Let's take some time to reflect holistically on the last month, try not to allow recency bias to skew your feedback for the month. We would like teams to get as much constructive feedback as possible, so please add as much detail as you can.

Name ∨                                              Required ⬤    👁

Name

Add some help text

+ Add

⬤ Limit record selection to a view

⊞ Monthly Full Team Retro View                              ∨

ⓘ  Record selection will be limited to records from Monthly Full Team Retro View

○ Show field only when conditions are met

3. **Quarterly Full Team Retro**
   - Form: *Team QUARTERLY Retro & Feedback Form*
   - Associated Table: **Quarterly Full Team Retro**

- View:

## Team QUARTERLY Retro & Feedback Form

It's almost time to come together as a team for out next Team Quarterly. In preparation for this, please take a few minutes to complete your feedback on the last quarter.

(Questions 1-5 focus on your team as a whole and their interaction within each of our focus areas)



> ⓘ **design ensures centralized control and standardized naming across tables, which is critical for the automation logic described in** Explanation of Record Naming and Summary Table Links**.**

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# Verifying and Correcting Record Links

Use views under the **Manual Check** section to verify that records are correctly linked to their summary tables. If issues are found, manually correct them as described below.

> 🔥 if no matching record exists in a summary table, a new record is created. If a record exists, the new entry is linked to it.
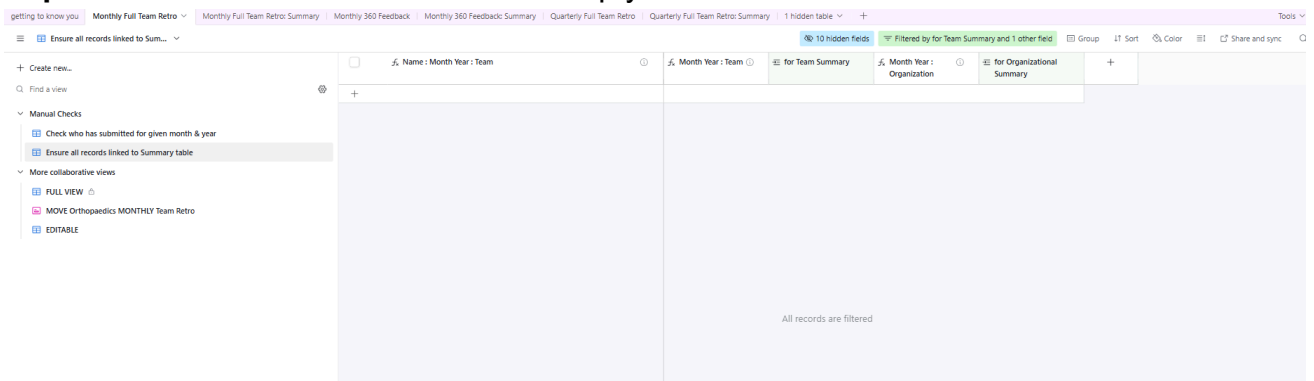
## `Monthly Full Team Retro` **Table**

## Check Who Has Submitted Reviews

- **View**: "Check who has submitted for given month & year"
- **Action**: Update filters to select the correct **month** and **year**.
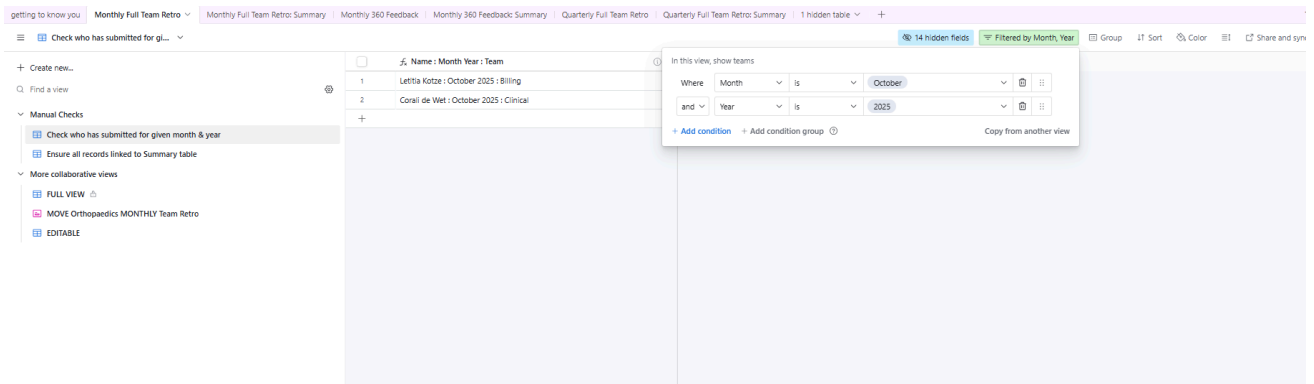


## Ensure All Records Are Linked

- **View**: "Ensure all records linked to Summary table"
- **Expected Result**: The view should be empty.



- **If Not Empty**:
  - Copy and paste (or drag) values:
    - From `Month Year : Team` to `for Team Summary`.
    - From `Month Year : Organization` to `for Organizational Summary`.

## `Monthly 360 Feedback` **Table**

## Ensure All Fields Are Linked

- **View**: "Ensure all records linked to Summary table"
- **Expected Result**: The view should be empty.

- **If Not Empty**:
  - For **Personal Summary**:
    - Copy and paste (or drag) values from `Name : Month Year` to `for Personal Summary`.



  - For **Team Summary**:
    - Use the `Month Year : Team Receiving Feedback` field to identify **all records** that should be linked for the same team and period.
    - Update the `for Team Summary` field to include all relevant records.



    - **Important**: Ensure the `for Team Summary` field links to **all records** with the same team and period, not just a single record.

> ⚡ **linking only a single record for team feedback is insufficient. Verify team feedback grouping as described in** [Check Team Feedback Grouping](#)**.**

## Check Who Has Submitted Reviews

- **View**: "Check who has submitted for given month & year"

- **Action**: Update filters to select the correct **month** and **year**.



## Check Team Feedback Grouping

- **View**: "Verify all -- team entries correctly grouped"
- **Expected Result**: The number of **linked records** in the `for Team Summary` field should be identical for all records within each subgroup (team/period).
- **If Not**:
  - Use the method in <u>Ensure All Fields Are Linked</u> for **Team Summary** to correct links.
- **Note**: The number of linked records may be less than the total number of submissions if individuals submit feedback for themselves, as they link to the same summary record as feedback from others.



## `Quarterly Full Team Retro` **Table**

## Ensure All Fields Are Linked

- **View**: "Ensure all records linked to Summary table"

- **Expected Result**: The view should be empty.
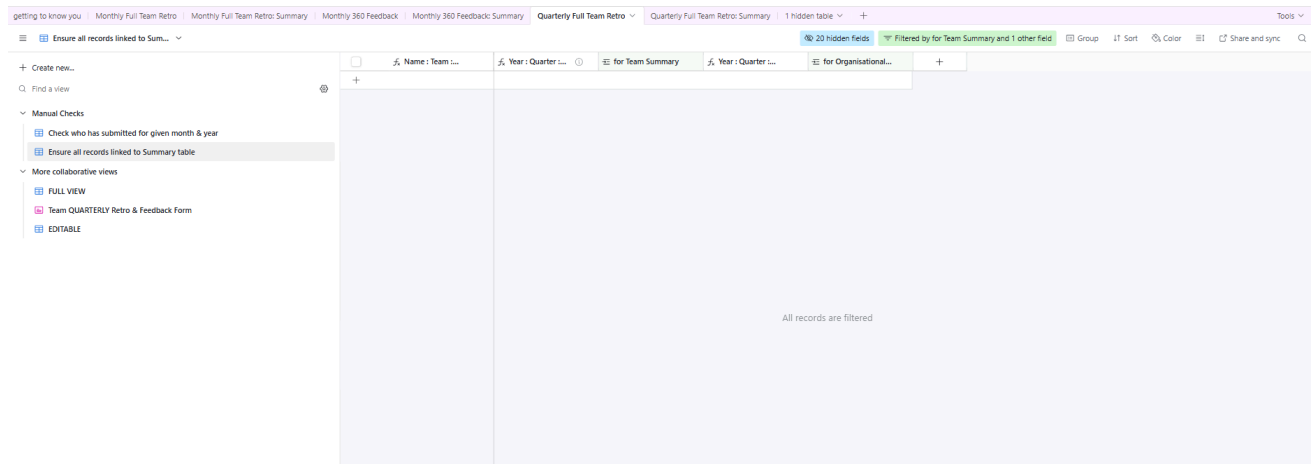


- **If Not Empty**:
  - Copy and paste (or drag):
    - From `Year : Quarter : Team` to `for Team Summary`.
    - From `Year : Quarter : Organization` to `for Organisational Summary`.

## Check Who Has Submitted Reviews

- **View**: "Check who has submitted for given month & year"
- **Action**: Update filters to select the correct **month** and **year**.
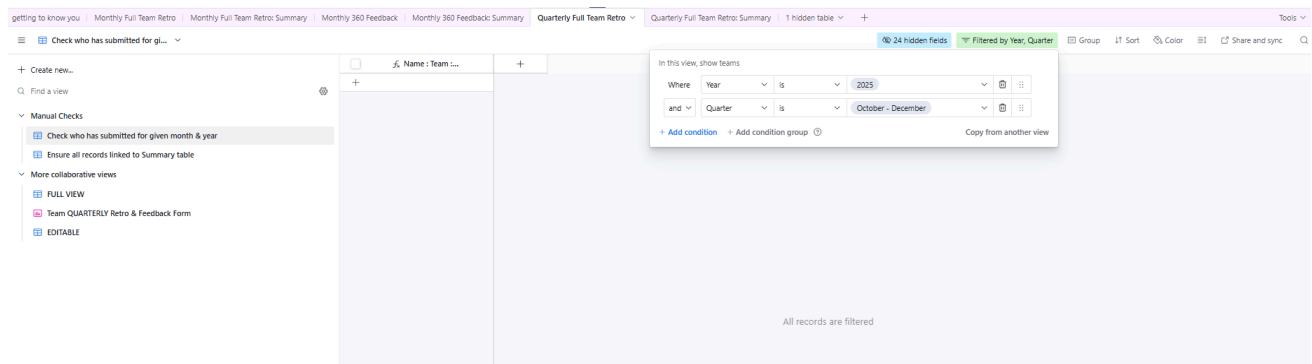


# Configuring Dropdowns

## Year Dropdown Limitation

The **Year** field in forms for **Monthly Team Retro**, **Monthly 360 Feedback**, and **Quarterly Team Retro** has limited options (up to 2030) and must be manually updated as needed.

## Steps to Update

1. Add new year options to the **Year** field in the relevant tables if needed.
2. Update the following forms to include the new year:
   - [ ] *MOVE Orthopaedics MONTHLY Team Retro*

- ☐ *MOVE Orthopaedics MONTHLY Team Feedback*
- ☐ *Team QUARTERLY Retro & Feedback Form*

3. Optionally, hide older year options to streamline the dropdown.



> ✏ **the Year field cannot be derived from the Date Created field because feedback may be submitted in a different period (e.g., January 2026 feedback for December 2025)**

## Name Dropdown Selection

To update the names available in form dropdowns, refer to Updating Team Structure.

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# Updating Team Structure

The **Team Structure** table requires manual updates when team composition changes. Use the **Use to Make Alterations** view in the **Team Structure** table for all updates.

## Adding New Team Members

1. Navigate to the **Add New Team Member** view.
2. Add the member's name to the **Team Members Name** field.
3. Specify their **Team(s)**.
4. Define their **Participants Involvement** (e.g., which forms they appear in).

5. Ensure the **Active Member** field is set to "Yes" to include them in the **Active Participants** view, which populates form dropdowns.



> 🖉 the **Active Participants** view filters names for dropdowns in forms, ensuring only active members are selectable.

## Removing Team Members

1. Navigate to the **Update Active Team Members** view.
2. Set the **Active Member** field to "No" to exclude the member from form dropdowns (via the **Active Participants** view).
   - **Note**: This does not delete the member from the table, only removes them from dropdowns.

## Re-Adding a Previous Team Member

1. Navigate to the **Reactivate Previous Team Member** view.
2. Verify or update the member's **Team(s)** and **Participants Involvement**.
3. Set the **Active Member** field to "Yes" to include them in form dropdowns.

## Updating Team or Participation

1. Navigate to the **Update Active Team Members** view.
2. Modify the **Team(s)** or **Participants Involvement** fields as needed.

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**End of Document**

*Last Updated: 13 Movember 2025*