



# Nigel Onboarding - Installation Guide

In this document you will find a guide on how to get all the data you need to register yourself to Nigel, set up the administration and start to onboard your newcomers.

If you don't want to read the whole document, you can take a look at our [video manuals on YouTube](#). You can also read our cheat sheets in this document. But we really recommend you to read the whole document to get to know how Nigel works and how to set it up correctly. It can also prevent some future problems and misunderstandings.



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# Registration

- You can take a look at our [Registration guide video on YouTube](#)

## Cheatsheet

1. Visit the [Airtable](#) and create a new account (it is free) or sign in
2. Create a new base and name it Onboarding
3. Visit your [account](#) and create a new API key (should begin with **key\*\*\***)
4. Visit [Airtable documentation page](#) and click your previously created base
5. Find the sentence “*The ID of this base is app\*\*\*.*” and copy the green base ID (should begin with **app\*\*\***)
6. Copy and paste the API key and base ID to the [Nigel registration form](#)
7. [Add Nigel to your Slack workspace](#)

## Guide

### Why Airtable?

[Airtable](#) is a table processor software in the cloud which has database functions. It means that the administration is simple for non technical users also because the software is just a table like Microsoft Excel, Google Sheets or any other spreadsheet product. Almost all employees across the world know how to use these programs. Our mission is to make the onboarding administration simple. Look at the pros:

- You can easily create new columns, tables, choose data types and fill values
- It is HR friendly, **no technical employee needed**
- **It is free** for our use case, see [Airtable pricing](#)
- No administration and MySQL (or other) database needed

Besides that, Airtable has a simple API so it is easy for us to use Airtable’s database functionalities. It means that our product could be cheaper than Google Sheets / Microsoft Excel / MySQL database or custom administration.

Airtable is a very popular product. Companies like [Netflix](#), [Shopify](#) or [Medium](#) also use Airtable for their purposes.

### Create Airtable Account

Visit [Airtable.com](#) and click the **Sign up for free** button in the top right corner.



Contact sales

[Sign up for free](#)

[Sign in](#)

records	Name	Hero Image	In Market	Budgeted	Actual	Budgeted vs. Act	Related
<b>Scheduled</b>							
1	Celebrity Workout Series		10/01/21-10/30/21	\$75,000.00	\$125,000.00	167%	Member new
2	WFH (Workout from Home)		09/15/21-10/14/21	\$12,500.00	\$12,500.00	100%	
<b>In Progress</b>							
3	Podcast Promotion		09/06/21-09/24/21	\$125,000.00	\$250,000.00	200%	Assets for p

The registration modal window will be shown. Fill in your company email or sign in with Google to create a new account. Also fill in your full name and password if needed. Then you can skip all the other additional questions.



## Create your account

Work email

nigel@onboarding.com

[Continue](#)

OR

Sign up with Google

By signing up, you agree to the [Terms of Service](#) and [Privacy Policy](#).

Already have an account? [Sign in](#)

After you are successfully in, do not forget to verify your email.

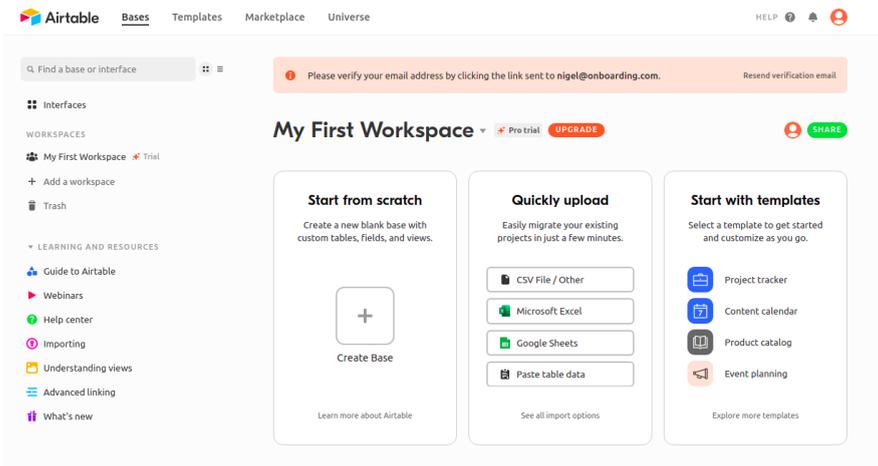


Please verify your email address by clicking the link sent to [nigel@onboarding.com](mailto:nigel@onboarding.com).

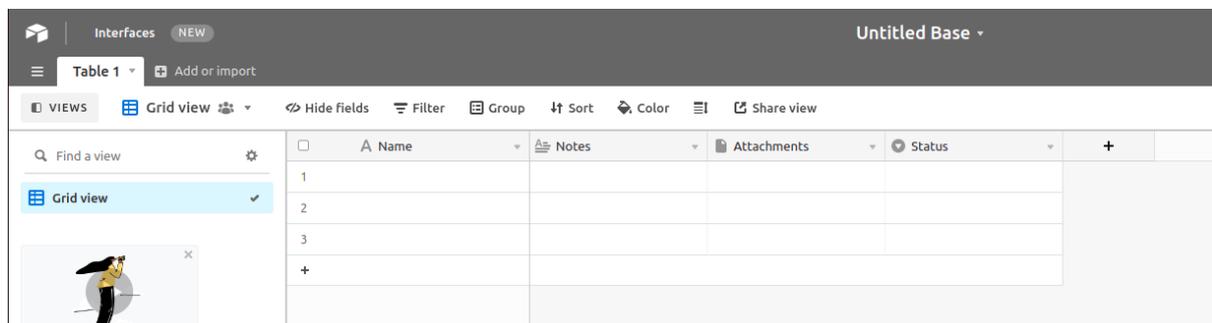
[Resend verification email](#)

## Create a New Base

After you verified the email you can see your workspace.



Click the **Start from scratch** button and create a new base. That is your database (or spreadsheet document). There will be all the data you need for sending the onboarding messages.



You can see a default table structure and **Untitled Base** base name. If you double click the base name, you can change it to whatever name you want, for example **Onboarding** to keep it descriptive for you and your colleagues. **Double click is working across the platform** so if you double click the column name you can change the name and type too.

For the registration purpose it's all you need and you can continue with the next chapter [Get a base ID](#). If you are already registered, you should set up your tables so you can continue with the [Create a Users table](#) chapter.



## Get a Base ID

We successfully created our base and now it is time to get the base ID which Nigel needs for connecting to your database. Without this information Nigel is not allowed to send any messages.

This process is a bit complicated because you have to visit Airtable API documentation on [Airtable.com/api](https://airtable.com/api). Now you have to choose workspace which is our previously created Onboarding base, so click the **Onboarding** base at the bottom.

### REST API

After you've created and configured the schema of an Airtable base from the graphical interface, your Airtable base will provide its own API to create, read, update, and destroy records.

[Click here for Airtable's metadata API documentation.](#)

Select a base to view API documentation

My First Workspace



An API documentation page will be shown. At the top of the page there is the **INTRODUCTION** chapter. In the middle of this chapter there is a sentence “**The ID of this base is <baseId>**”.



**On** Airtable API for "Onboarding" ▾

**INTRODUCTION**

The **Onboarding** API provides an easy way to integrate your **Onboarding** data in Airtable with any external system. The API closely follows REST semantics, uses JSON to encode objects, and relies on standard HTTP codes to signal operation outcomes.

The API documentation below is specifically generated for your base. We recommend that you use the [graphical Airtable interface](#) to add a few records of example data for each table. These records will be displayed in the documentation examples generated below.

The ID of this base is **appUBY** [REDACTED]

**Please note:** if you make changes to a field (column) name or type, the API interface for those fields will change correspondingly. Therefore, please make sure to update your API implementation accordingly whenever you make changes to your Airtable schema from the graphical interface.

Official API client:

- JavaScript: [airtable.js](#) (Node.js + browser)

Community-built API clients:

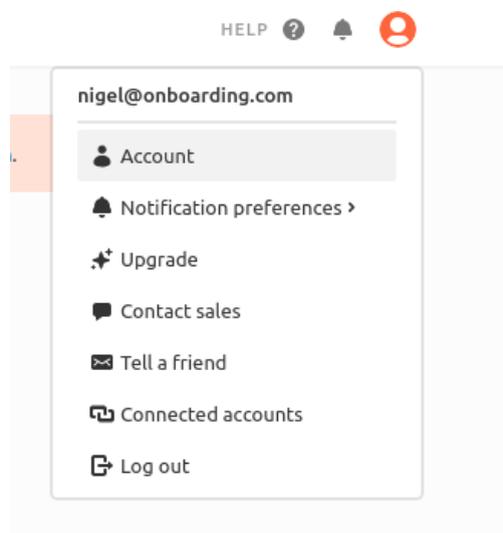
- Ruby: [airrecord](#)
- .NET: [airtable.net](#)
- Python 3: [pyairtable](#)
- Python 2/3: [airtable.py](#)

**METADATA**

Please copy the green ID without the full stop at the end. You will fill this ID into the registration form later. The last thing we need from you is the Airtable API key.

## Create the API Key

Go back to your workspace on [Airtable.com](#). Click your profile avatar in the top right corner and click the **Account** button.





In the middle of the opened page is the **API section** which should be empty now (if it's your first use of Airtable).

↔ API

There is no personal API key associated with your account. It's required in order to use the [Airtable API](#).

Generate API key

Click the **Generate API key** button. A new key will be created and new rows will be shown.

↔ API

This is your personal API key. It's required in order to use the [Airtable API](#).

Your personal API key has access to all the data in your Airtable bases.

Only share this key with third-party services and applications that you trust.

To limit the access of a third-party service, consider following [these instructions](#) to create a read-only API key and sharing that key instead .

.....

↻ Regenerate API key   🗑 Delete key

The purple password field contains your API key. If you click this field, an API key text will be shown. Please copy this shown API key and paste it to the [registration form](#).

That's it! Now keep in mind that you should not delete your API key and base. If you delete one of these items, Nigel will not work anymore. If something like this happens, create a new base or generate a new API key and send the base ID or API key to our support and we will fix it.

## Slack Team ID

In the [registration form](#) and the Slack app you need some special data from Slack - the team ID and user ID. We will show you where to find this information.

If you open your Slack workspace in the browser, you can take a look at your URL. There is something like this: **https://app.slack.com/client/T02T...GP6J/...** the **T02T...GP6J** is the team ID we are looking for. It should begin with the **T**.



## Register Your Team

Ok, we have prepared the **base ID** and generated the **API key**. Please visit [Nigel registration form](#) and fill in all the required information, also the base ID and API key. All the



data will be safely stored in our database just for generating the payment information and for Nigel to set it up.

After the registration you can continue with setting your administration below. Make sure you have set all the Users and Onboarding tables and data.

After you are successfully registered, don't forget to [add Nigel to your Slack workspace](#).



# Administration Set up

- You can take a look at our [Administration set up guide video on YouTube](#)

## Cheatsheet

1. Go to your [Airtable workspace](#) and click the previously created Onboarding base
2. Name the default table **Onboarding** and keep only two columns there
  - a. The **message** column of type long text
  - b. The **send X minutes after joining the team** column of type integer (number without floating point numbers)
3. Create a new table called **Users** for managing your newcomers
4. Keep just 4 columns there called
  - a. The **email** of type email
  - b. The **full name** of type single line text
  - c. The **onboarding started at** of type date with 24 hour time format
  - d. The **job title** of type single line text
5. Create personalized onboarding tables
  - The **Onboarding** table contains common onboarding messages (eg. Link to your wiki which you probably want to send to all of your newcomers)
  - The **job title** tables for personalized messages specific to each team or job title (eg. Software IDE license which you want to send just to your developers)
    - a. Create new tables with names of all your teams and job titles in your company that you want to onboard
    - b. Create the same columns as the **Onboarding** table has (because these are onboarding tables too - but personalized)
6. Add newcomers
  - a. Add new rows to the **Users** table
    - i. The **email** field is required and must be the same as newcomer's Slack login email
    - ii. Add the **job title** (optional) if you want to enable the personalized onboarding for the user



- The value has to be the same as one of the table names you have created in step 5 of this cheat sheet

## 7. Start with onboarding your newcomers

- After the Slack member joins the team (first Slack login) the onboarding will automatically start
- Use the `/onboard-user @name` command to manually add Slack user to the onboarding process

- We also recommend you to take a look at pictures in the [Our Goal chapter](#) below to see the final result

## Guide

### Our Goal

Let's take a look at our today's goal. On the screenshot below you can see the whole **Onboarding** base with two tables for personalized onboarding messages **Customer service** and **Web developer**. The **Onboarding** table is for onboarding messages that are common for all newcomers, and the **Users** table is for managing your newcomers.

	email	A full name	onboarding started at	A job title	
1	john@doe.com	John Doe	1/21/2022 08:00	Web developer	
2	sandra@smith.com	Sandra Smith	1/24/2022 10:00	Customer service	
+					

You can see there is an **email** column of type **email**, **full name** column of type **Single line text**, **onboarding started at** column of type **Date** with time included (24 hour format) and the **job title** column of type **Single line text** for personalized onboarding messages in **Users** table. If you look at the **Onboarding**, **Customer service** and **Web developer** tables, they have the same columns. It's a message of type **Long text** and **send X minutes after joining the team** of type **Number** (integer - without floating point numbers).

	A message	# send X minutes after joining the team
+		



	A message	send X minutes after joining the team
+		

If you look at the **Users** table again, you can see the **job title** column has the same value as the one of the two personalized onboarding tables.

e...	A full ...	o...	A job title
john@d...	John Doe	1/... 0...	Web developer
sandra...	Sandra S...	1/... 1...	Customer service

## Create an Onboarding Table

Go back to your [workspace](#) and click our previously created base **Onboarding**. Double click the **Table 1** name at the top and rename it to **Onboarding**.

The table name is important and it has to be called **Onboarding** (with capital O at the beginning). There will be just two columns, so please remove the rest of the unnecessary columns with right click at the column and **Delete field** button at the bottom list.

The first column should be called **message** and the type should be text (we recommend you to use long text type). The second column has quite a long name "**send X minutes after joining the team**" (yes, the whole sentence is the column name). Please make sure your column has the correct name (lowercase and capital X). The last thing is to change the "send X minutes ..." column type. It should be a number and do not forget to switch the format to integer (number without floating point numbers).



sent in minutes after team join

# Number

Format Default

Decimal (1.0)  
Decimal (1.0)  
Integer (2)  
1.0

Allow negative numbers

All right! Our first table is done! It should look like the following screenshot.

<input type="checkbox"/>	A message	# send X minutes after joining the team	+
+			

There should be a set of messages that will help your newcomers to adapt to the team and the whole company. The column “send X minutes ...” sets when these messages should be sent. For example a message “Your first day is over ...” should be sent after 8 hours of work (480 minutes), not at the beginning of working hours (employee’s start date will be described in the next chapter [Create a Users table](#)).

Messages are sent automatically each 15 minutes. Make sure you are sending a reasonable amount of messages at once because newcomers could be a bit stressed. It is a lot of new information for them and a lot of messages will make the situation much harder.

So to summarize it, a message is a set of messages you want to write to your newcomers and “send X minutes ...” indicates how many minutes after a newcomer starts working for you the message will be sent.

All the messages could contain Slack features like ` sign (gravis) for code or **:tada:** signs for smileys and so on.

### Create Personalized Onboarding

Personalized message tables have the same structure as the Onboarding table that we described before. It is also onboarding so the tables are similar (just the messages differ). So if you are a software development company, for example, and have job titles like



frontend, backend and devops, just create these three tables (case sensitivity of table names is on you) with the same columns as in the Onboarding table. To the Users table under the job title field type the correct job title for each user (see above).

## Create a Users Table

Next to the Onboarding table name you can see the **Add or import** button. Click it and click the first option at the top of the list **Create empty table**. Double click the **Table 1** name at the top and rename it to **Users**. The name **Users** is very **important** because Nigel slackbot expects this name, if the name of the table is different, Nigel will **not work correctly**.

Now we need to rename all four columns to **email**, **full name**, **onboarding started at** and **job title**. These **names are also important** like the table name, do not use Email with capital E, for example, just keep it lowercase and with spaces.

The **email** field type is email and represents the user's Slack email (email which user uses to login). The **full name** column type is **Single line text** and represents the user's name and surname (value is optional).

The **onboarding started at** column has type **Date** and do not forget to include a time field with the 24 hour time format. This field represents the date and time when an employee starts or the onboarding should start. Let's say you signed a contract with Peter on 01-01-2022 at 2:00 PM. But Peter will fully join your company on 01-02-2022 at 8:00 AM. It means Peter's onboarding should start on 01-02-2022. So you will type this information in the particular row with Peter's email, full name and job title.

The last column you have to create is called **job title**. The column type is **Single line text** and represents the job title or team which your new employee is joining. This column is here for personalized onboarding which we described in the previous chapter ([Create an Onboarding table](#)).

<input type="checkbox"/>	 email	A full name	 onboarding started at	A job title
1				
+				

Now you can fill in your newcomers. Email is required if you want to use personalized onboarding. If you do not want to use personalized onboarding, it could be empty (but must exist with all the columns). Email value must be equal to employee's Slack login email (email which you have sent him/her the Slack invitation to). Full name is not required and could be empty - it is primarily for your identification. Onboarding started at is also optional. If it is not set, Nigel will start onboarding when an employee joins the team (when he/she accepts the Slack invitation). And the last job title field is also optional if it is not set, Nigel will just send messages from the Onboarding table. If the job title row value has the same name as one of your tables, Nigel will look for messages in this table too. So there will be common messages from the Onboarding table (like a link to the company's wiki, for example) and from the "*job title*" table (like an IDE software license for developers, for example).



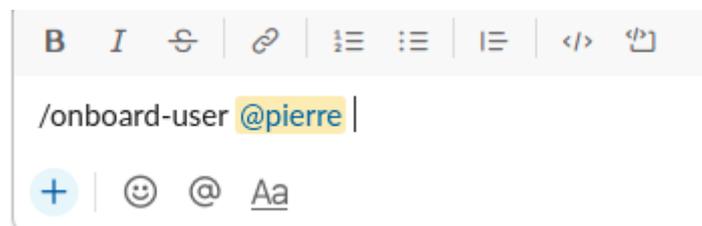


## How to Onboard Users?

Users' onboarding starts automatically when a user joins the Slack team - after their first login Nigel checks if there is some data about the user in Airtable (the *users* table). Then each 15 minutes the onboarding messages are sent.

But sometimes you can start to onboard someone who is already in your Slack workspace. Then you can use our Slack command. So start a direct message with the Nigel app and type in the command: **`/onboard-user @name`**. There is one required parameter. The user - please just tag him/her.

**Important note:** after you send the command request you can face a timeout error. Your action was successful and your user is ready to be onboarded. So don't worry about the error. We are working on this unpleasant bug.





## Summary

Make sure you have set all the required data, you have correct case-sensitive letters and minimum Users and Onboarding tables. Without it Nigel would not work.

That's it from us, if you want a custom functionality for Nigel, do not hesitate to contact us! Also contact us if you identify any bugs or you have a feature request. Have a nice onboarding!

One last thing, do not forget to add [Nigel Slackbot to your Slack workspace](#).