**IOLEBA- U**

Chapter 2

# Getting Started with n8n

## Introduction

Now that you understand what n8n is and why it's valuable, it's time to get hands-on. In this chapter, you'll install n8n, explore the interface, and create your very first workflow. By the end of this chapter, you'll be comfortable navigating the n8n environment and ready to build more complex automations.

## Installation Options

n8n offers several installation methods, each with different advantages. Let's explore them from easiest to most advanced.

### Option 1: n8n Cloud (Easiest)

The quickest way to start is with n8n Cloud, the official hosted service. This option requires no installation or technical setup.

**Getting Started with n8n Cloud:**

1. Visit **cloud.n8n.io** in your web browser
2. Click "Sign Up" and create an account using email or OAuth (Google, GitHub)
3. Verify your email address
4. You're immediately taken to the n8n interface—ready to build!

**Recommended for Beginners:** If you're new to n8n or want to start learning immediately, begin with n8n Cloud. You can always migrate to self-hosted later once you're more comfortable with the platform.

## Option 2: Desktop App (Beginner-Friendly)

The n8n Desktop app provides a local installation without dealing with command lines or technical configurations. It runs on your computer and includes everything you need.

**Installation Steps**

1. Visit **n8n.io/download**
2. Download the installer for your operating system (Windows, macOS, or Linux)
3. Run the installer and follow the setup wizard
4. Launch n8n from your applications menu
5. n8n opens in your default web browser automatically

**Desktop App Benefits:**

• Full control of your data—everything stays on your computer
• No ongoing subscription costs
• Works offline (except for external integrations)
• Easy to start and stop

## Option 3: npx (Quick Command Line)

If you're comfortable with the command line, npx provides the fastest self-hosted setup. This requires Node.js installed on your system.

**Prerequisites**

- Node.js version 18 or higher
- Basic command line familiarity

**Installation Command**

```
npx n8n
```

That's it! The first run downloads and installs n8n, then starts it automatically. Your terminal will display the URL, typically `http://localhost:5678` .

> ⚠ **Important Note:** With npx, n8n runs only while the terminal window is open. Closing the terminal stops n8n. For persistent operation, use Docker or npm global installation instead.

## Option 4: Docker (Recommended for Production)

Docker provides a containerized n8n installation that's easy to manage, update, and deploy to production environments. This is the recommended approach for serious use.

**Prerequisites**

- Docker installed on your system
- Basic Docker knowledge helpful but not required

**Basic Docker Setup**

```
docker volume create n8n_data

docker run -it --rm \
```

```
  --name n8n \
  -p 5678:5678 \
  -v n8n_data:/home/node/.n8n \
  n8nio/n8n
```

## Choosing Your Installation Method

| Method | Best For | Difficulty | Cost |
|--------|----------|------------|------|
| n8n Cloud | Quick start, learning, small teams | Easy | Free tier + paid plans |
| Desktop App | Personal use, non-technical users | Easy | Free |
| npx | Testing, temporary setups | Medium | Free |
| Docker | Production, serious use, teams | Medium | Free |

> **Our Recommendation:** For this textbook, we recommend starting with n8n Cloud or the Desktop App. Both let you focus on learning without technical overhead.

# Initial Configuration

Regardless of installation method, you'll need to complete some initial setup when you first access n8n.

## First Launch

When you first access n8n, you'll be greeted with a setup wizard:

1. **Create Owner Account:** Set up your admin credentials
2. **Personalization:** Answer questions about your use case (optional)
3. **Welcome Screen:** Introduction to key features and suggested workflows

> ⚠ **Security Best Practices:**
>
> - Use a strong, unique password
> - Enable two-factor authentication if available
> - For self-hosted: don't expose n8n directly to the internet without proper security
> - Change default ports in production environments

# Exploring the n8n Interface

Now that n8n is running, let's familiarize ourselves with the interface. Understanding the layout will help you work efficiently.

## Main Interface Components

### 1. The Canvas

The central area where you build workflows. This is your workspace:

- Drag and drop nodes here
- Connect nodes with wires
- Pan by clicking and dragging
- Zoom with mouse wheel or controls

### 2. Top Menu Bar

Contains workflow-level actions:

- **Workflow Name:** Click to rename
- **Save:** Save your current workflow
- **Execute Workflow:** Run the entire workflow manually
- **Settings:** Workflow configuration options

### 3. Left Sidebar

Navigation and tools:

- **Workflows:** List of all your workflows

- **Credentials:** Manage authentication for services
- **Executions:** View workflow run history
- **Settings:** Global n8n settings
- **Templates:** Browse pre-built workflows

**4. Node Panel**

Appears when you click "Add Node" or press Tab:

- Search for nodes
- Browse by category
- View node descriptions
- Add triggers, actions, or logic nodes

**Navigation Tips:**

- **Tab:** Add new node
- **Ctrl/Cmd + S:** Save workflow
- **Delete/Backspace:** Delete selected node
- **Ctrl/Cmd + C/V:** Copy/paste nodes
- **Ctrl/Cmd + Z:** Undo

# Creating Your First Workflow

Let's build a simple workflow to get familiar with the basics. We'll create a workflow that sends you a daily motivational quote via webhook.

## Step-by-Step: Your First Workflow

**Step 1: Create a New Workflow**

1. Click "Add Workflow" in the left sidebar
2. You'll see a blank canvas with a starter node
3. Click the workflow name at the top and rename it to "Daily Motivation"

**Step 2: Add a Schedule Trigger**

1. Delete the default manual trigger
2. Click "+ Add first step" on the canvas
3. Search for "Schedule Trigger"
4. Click to add it to the canvas
5. Configure it:
   ◦ Mode: Every Day
   ◦ Hour: 8 (8 AM)
   ◦ Minute: 0
6. Click "Execute Node" to test

> **Understanding Trigger Nodes:** Trigger nodes start your workflow. The Schedule Trigger runs automatically at specified times. You'll see a green checkmark when it executes successfully.

**Step 3: Add an HTTP Request Node**

1. Hover over the Schedule Trigger node
2. Click the "+" button that appears
3. Search for "HTTP Request"
4. Add it to the workflow
5. Configure it:
   ◦ Method: GET
   ◦ URL: `https://api.quotable.io/random`
6. Click "Execute Node" to test

You should see a response with a quote in JSON format!

**Step 4: Add a Set Node (Data Formatting)**

1. Add a "Set" node after the HTTP Request
2. This node lets us format the data
3. Click "Add Value"
4. Select "String"
5. Name: `message`
6. Value: `Today's motivation: {{ $json.content }} - {{ $json.author }}`

7. Click "Execute Node"

> **Understanding Expressions:** The curly braces `{{ }}` contain expressions that pull data from previous nodes. `$json.content` gets the quote text, and `$json.author` gets the author name.

**Step 5: Save and Activate**

1. Click "Save" in the top right
2. Toggle the "Active" switch in the top right
3. Your workflow is now live and will run daily at 8 AM!

> **What You Just Learned:**
>
> - Creating a new workflow
> - Adding and configuring nodes
> - Connecting nodes together
> - Testing individual nodes
> - Using expressions to access data
> - Activating a workflow

# Understanding Executions

Every time your workflow runs, n8n creates an execution record. This is crucial for monitoring and debugging.

## Viewing Executions

1. Click "Executions" in the left sidebar
2. You'll see a list of all workflow runs
3. Click any execution to see details
4. Review what data flowed through each node
5. Check for errors or unexpected results

> **Execution Best Practices:**
>
> - Always test workflows manually before activating
> - Check executions regularly for the first few days
> - Use execution data to debug issues
> - Configure retention policies to manage storage

# Common Beginner Issues

## Issue 1: "Workflow not triggering"

**Solution:**

- Ensure the workflow is Active (toggle at top right)
- Check trigger configuration
- For webhooks, verify the URL is accessible
- Review execution history for error messages

## Issue 2: "Credentials not working"

**Solution:**

- Verify credentials are saved in the Credentials section
- Check credential permissions in the source service
- Some services require app-specific passwords
- Test credentials with the "Test" button

## Issue 3: "Can't connect nodes"

**Solution:**

- Drag from the small dot on the right side of a node
- Drop on the left side of the target node
- Connections flow left to right
- You can't connect backwards

## Issue 4: "Node shows error"

**Solution:**

- Click the node to see the error message
- Most errors are missing required fields
- Red fields indicate required inputs
- Hover over field names for help text

# Practice Exercises

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**Exercise 1: Manual Trigger Workflow**

**Goal:** Create a workflow that fetches weather data when you click Execute.

**Steps:**

1. Create a new workflow
2. Add Manual Trigger
3. Add HTTP Request to weather API
4. Add Set node to format data
5. Test by clicking Execute

**Exercise 2: Slack Notification**

**Goal:** Send yourself a daily Slack reminder.

**Steps:**

1. Schedule Trigger (daily at 9 AM)
2. Set node with reminder message
3. Slack node to send message
4. Configure Slack credentials
5. Activate workflow

## Key Takeaways

- n8n offers multiple installation options—cloud is easiest for beginners
- The interface has five main components: canvas, menu, sidebar, node panel, configuration panel
- Workflows consist of connected nodes that pass data left to right
- Test nodes individually as you build to catch issues early
- Executions provide history and debugging information
- Start with simple workflows and gradually add complexity
- The Schedule Trigger, HTTP Request, and Set nodes are fundamental building blocks

## Looking Forward

In Chapter 3, we'll dive deeper into nodes and data flow. You'll learn about the three categories of nodes (triggers, actions, logic), how data moves through workflows, and how to manipulate that data effectively. These foundational concepts will prepare you for building sophisticated automation solutions.