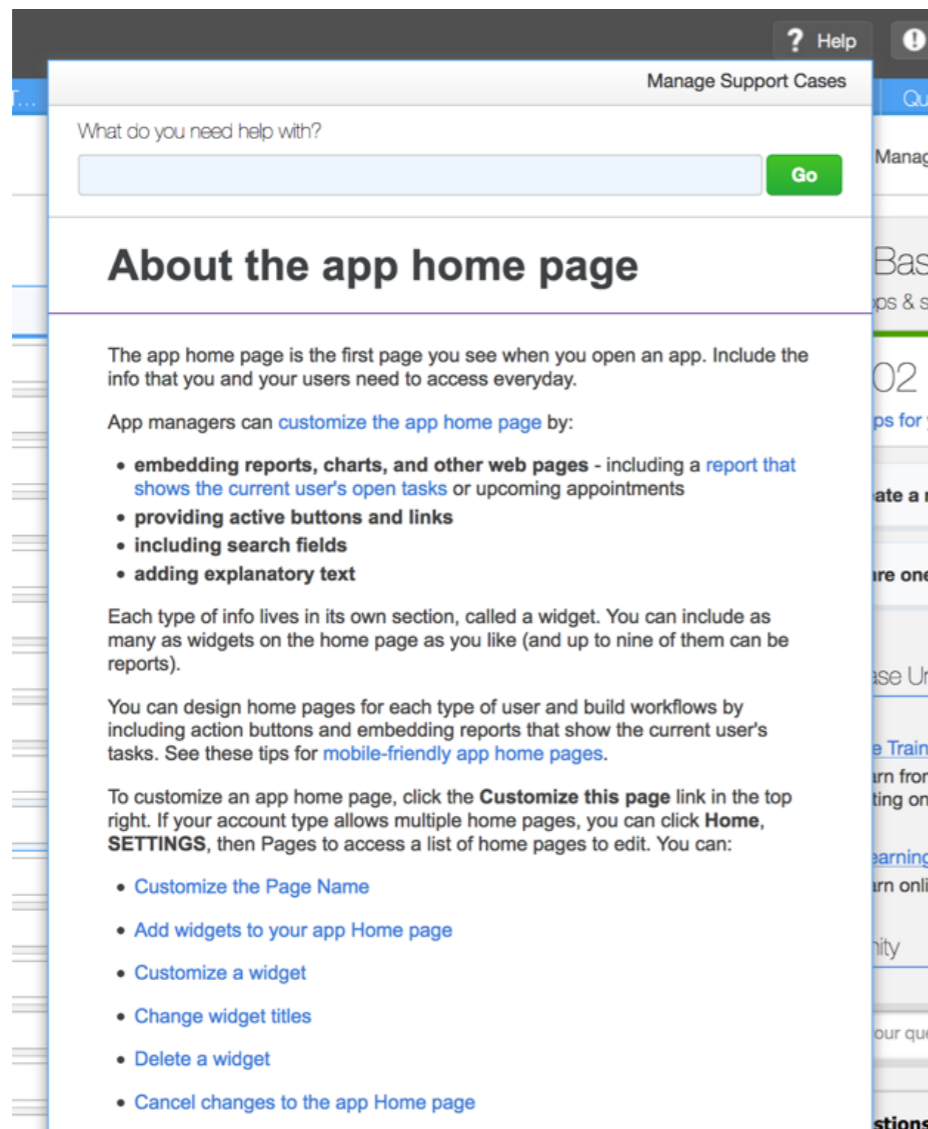# Context help

Next phase: Search and Resources changes
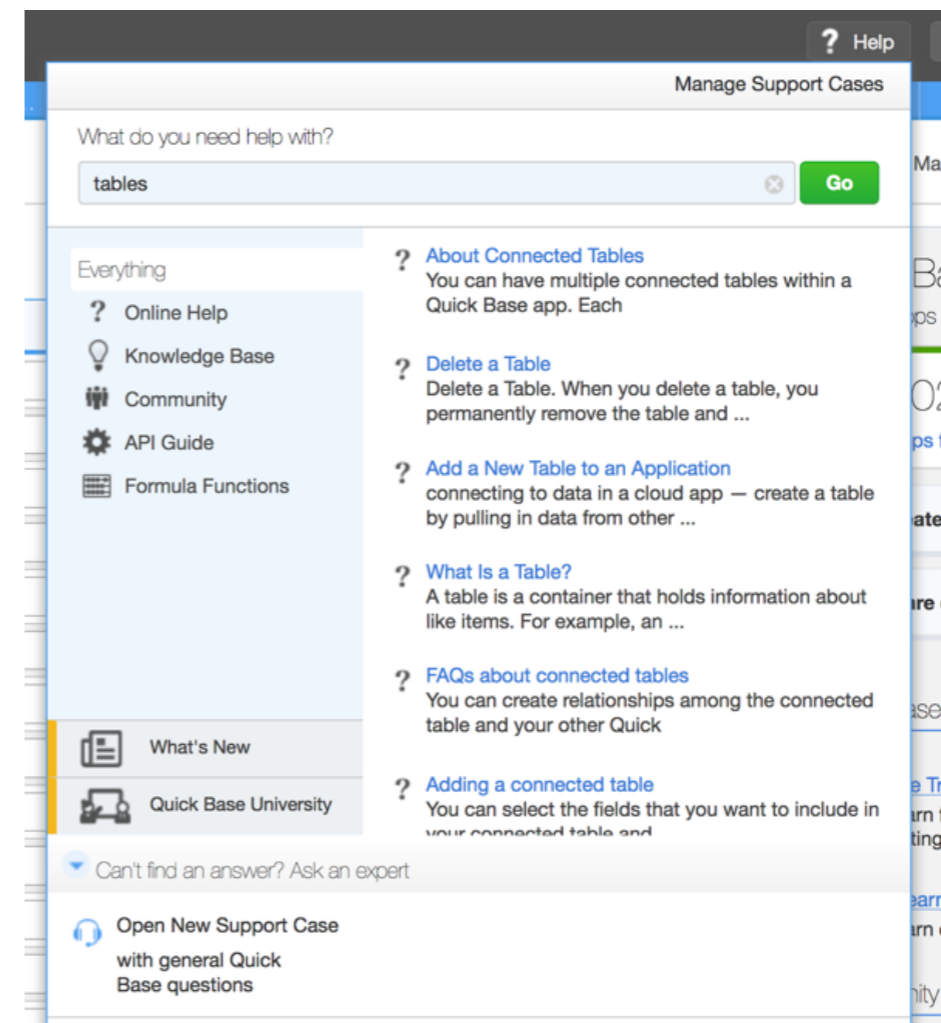Craig Lordan October 2017

Existing interaction

Click Help and context-sensitive topic appears

Perform search for results and additional resources

Next phase summary

- **Change search scope**
  The search scope should change to include only help topics and community forum posts. Knowledge Base is being deprecated. API Guide and Formula Function Guide are specialized advanced builder areas and can be separate links rather than included in the results.

- **Update user interface for search and resources**
  Update the layout, text, fonts, and icons so we have a streamlined, reorganized UI.

- **Remove search filters**
  To streamline the search interface and reduce confusion about what are links and what are not, we should remove the search filters from the interface.

- **Replace search engine**
  Quick Base needs to identify and license a new search engine to replace Google Enterprise Search.

Recommended layout — open support case button

Quick Base application interface:

Top navigation: + New | ★ Favorites | Q Search | ⊙ Help | ⊟ Pam Beasley ▾

Tabs: ⚓ My Apps | Product Manager... | Simple Project Manager | Ops Work Requ...

Icon menu: 🏠 Home | 👥 Users | 🚚 Orders | 🏛 Vendors | 🧁 Cupcakes | 🐷 Piggy Banks | Ne...

🏛 Vendors — Name of record goes here
⚙ SETTINGS | ▶ REPORTS & CHARTS

Customize this form
∧ Return | Next ⟩

▼ Section expanded

Task Name: Lorem ipsum dolor set emit

▶ Section collapsed

▼ Section expanded

Drop down field (user): Augusta Cole
Drop down field: Medium

Drop down field: In-Progress
Read only field: 02-22-2017

Date field: 08-31-2017
File attachment: Choose File | No file chosen

Multi line text field:
One of the best ways to make a great vacation quickly horrible is to choose the wrong accommodations for your trip. There is nothing quite as bad as spending a great day of vacation only to come back to a less-than-great place to stay for the night. Anytime you are away from home it is important to choose the best accommodations for your comfort and

Search for more help

[table reports   🔍]   **Search**

Create a Table report
When you create a Table report, Quick Base makes it easy to display only those...

Create Reporting Needs
You can create reports that contain data from more than one table by using......

Create a Table report
When you create a Table report, Quick Base makes it easy to display only those...

Create Reporting Needs
You can create reports that contain data from more than one table by using...

Display a Report
When you create a Table report, Quick Base makes it easy to display only those...

How to make a summary report from multiple tables? | Quick Base...
You can create reports that contain data from more than one table by using......

Create a Table report
When you create a Table report, Quick Base makes it easy to display only those...

Create Reporting Needs
You can create reports that contain data from more than one table by using

Access Support & Resources

✉ Email app manager   ☁ Manage Support Cases   ▤ Release Notes
🏫 Quick Base University   ⚙ API Guide   Σ Formula Functions

[Open Support case]

About the app home page

The app home page is the first page you see when you open an app. Include the info that you and your users need to access everyday.

App managers can customize the app home page by:

• embedding reports, charts, and other web pages - including a report that

Help with this app ▾

Annotations:

- Rare use of app-specific help links
- Typically nothing will show here but we need to support this

- Shorter search results area: 280px max
- Filters removed
- Scope limited to help and community
- Removed from scope: KB, API, Formula
- Icons removed from links
- Links continue to open in new tab
- Covered link shows this area scrolls

- New set of links (see last page for details)
- Manage Support Cases now here, flipped with Open Support Case

- Open Support Case button

Alternate layout — open support case link

- **Open support case here instead of button**
- **App-specific help to the right if available; usually blank**

Access Support & Resources links

Link text	Opens	Icon
Email app manager	Existing dialog	QuickBaseIconUISturdy iconUISturdy-mail e93c ✉
Manage support cases	My support cases: /qb/support/ListCases	QuickBaseIconTableSturdy iconTableSturdy-bell e960 🔔
Release notes	Release notes: help.quickbase.com/user-assistance/whats_new_in_Quick_Base.html	QuickBaseIconUISturdy iconUISturdy-report-menu-1 e959 📄
Quick Base University	university.quickbase.com	QB_icons_table _University ea18 🏫
API Guide	help.quickbase.com/api-guide/index.html	QuickBaseIconUISturdy iconUISturdy-settings e96b ⚙
Formula Function Reference	login.quickbase.com/db/6ewwzuuj?a=td	QuickBaseIconUISturdy iconUISturdy-formula e930 Σ
Open support case (in alternate approach)	New support case: /qb/support/NewCase	QuickBaseIconTableSturdy iconTableSturdy-bell e960 🔔