



QUICK BASE

**Design
Lab**

Overview

- Part of Empower Exhibit Hall
- 4 stations
 - 01 Visual Builder
 - 02 Getting Help
 - 03 New Grid for Reports
 - 04 Executive Dashboards
- Wishing Wall

52

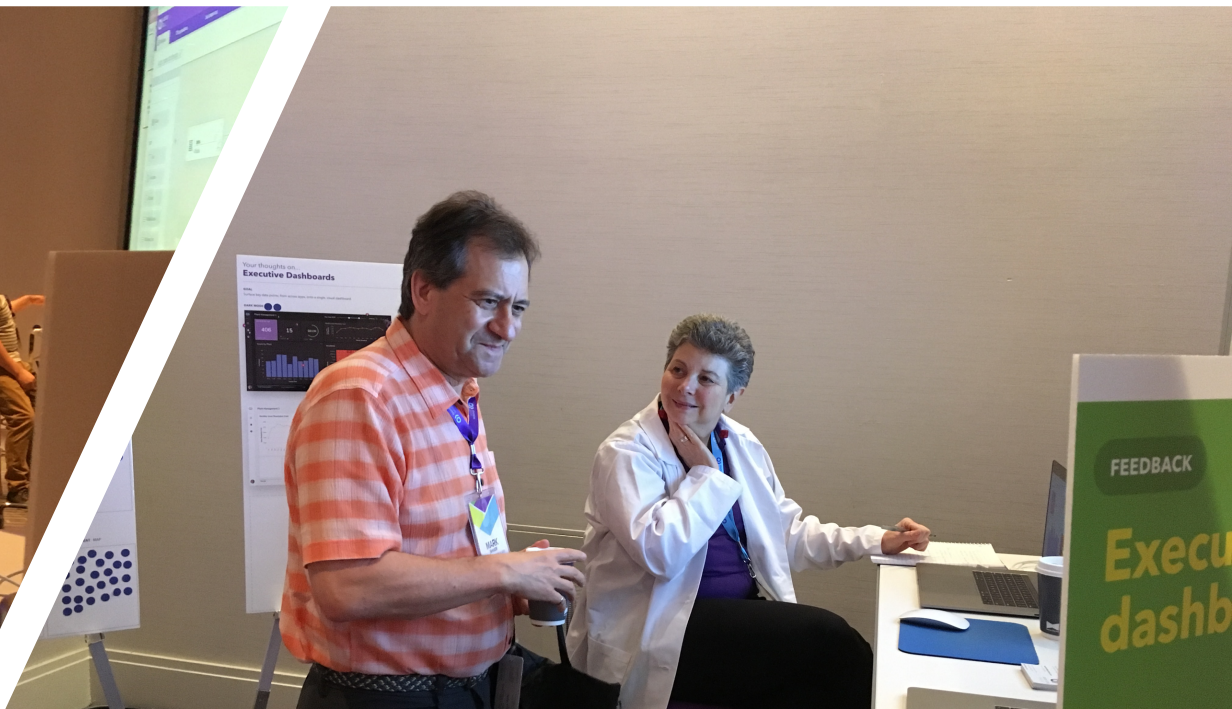
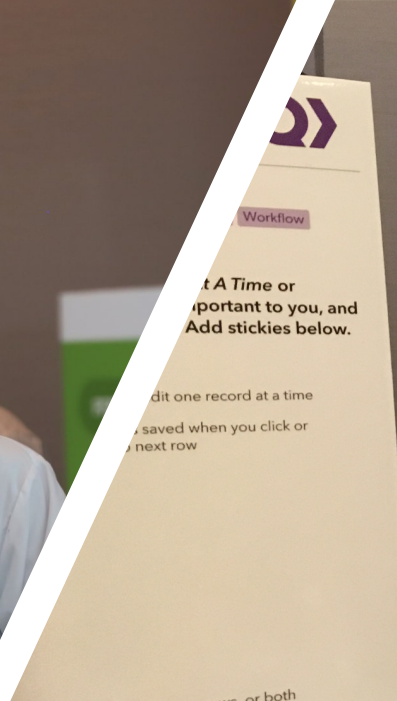
total
visitors

1

stolen
flamingo

Day	Exhibit Hall	Hours
Monday June 10 th	Kick-off party 5:30pm-8:00pm	2.5
Tuesday June 11 th	Breakfast 7:30-8:45am Lunch 12:00-1:30pm Networking Party 5:15-6:30pm	4
Wednesday June 12 th	Breakfast 8:00-9:15am: Lunch 12:15-1:30pm	2.5
Thursday June 13 th	Breakfast 8:30-9:15am	.75
		Total 9.75





Design lab app

Home Empower Registrants Participants Visual Builder Content Discovery Content Ranking Help Prototypes New Grid Executive Dashboard New Table

Empower Registrants List All This is a new report
Reports & Charts Save

Refresh Data Favorite

FILTERS

Check if basic info is complete
No
Yes

Search these empower registrants

If the row is GREEN = we have their basic data!

36 Empower registrants

	Name	Company Name	Email Address	Job Title	Pool?	EA?
<input type="checkbox"/>	Adrian Pestana	Southwest Airlines	adrian.pestana@wnco.com	Business Administration & Projects	<input checked="" type="checkbox"/>	
<input type="checkbox"/>	Alyssa Zmolk	Southwest Airlines	alyssa.zmolk@wnco.com	Tech Ops Maintenance Analyst		
<input type="checkbox"/>	Angelia Bennett	Southwest Airlines	angie.bennett@wnco.com	Sr. Business Analyst		
<input type="checkbox"/>	Bryan Carabeo	Southwest Airlines	Bryan.Carabeo@wnco.com	Sr Business Consultant - Reliability		
<input type="checkbox"/>	Dennis Nguyen	Southwest Airlines	Dennis.Nguyen@wnco.com	Quality Ops Research Sr. Analyst		
<input type="checkbox"/>	Dylan Pike	Southwest Airlines	dylan.pike@wnco.com	Business Administration & Projects		
<input type="checkbox"/>	Edward Zhang	Southwest Airlines	edward.kp.zhang@gmail.com	Sr Analyst Quality Performance		
<input type="checkbox"/>	Edwin Smith	Southwest Airlines	edwin.smith@wnco.com	Business Administration & Projects		
<input type="checkbox"/>	Eric Evans	Southwest	eric.evansvargas@wnco.com	Sr. Business		

Visual Builder Add Visual Builder
Reports & Charts

Customer name
adrian.pestana@wnco.com

Company:
Southwest Airlines

Which task? (Lookup or summary) *

☒ Lookup task
☐ Summary task

BEFORE STARTING THE TASK:

1. Brief overview of Visual Builder (Drag and drop interface to create NEW apps and EDIT existing apps.)
2. Open the VB and show dragging a table, dragging a field, editing a field property.
3. Show the printouts of the fake app to ground them in the use case for the tasks.
4. Open the prototype. Tell them this is a prototype and not everything is functional. If you are trying to click or do something and it's not responding, verbally tell me what you expect/what you are trying to do.

LINKS TO HAVE OPEN:

Team manager app:
<https://team.quickbase.com/dab/bpke5qqd/>

Lookup/Summary Prototype & Help Panel:
<https://of8mbv.axshare.com>

Help Tips Prototype:
<https://q5vnr.axshare.com>

Task 1 (Lookup) Help tasks General notes

READ THIS:

You want each of your team members to more easily see the contact information for each Engagement.

Your team has stated that the following fields would be helpful information to include:

- Customer Primary contact name
- Customer Primary contact email address

How would you add that information using the Visual Builder prototype?

- Includes a connected table with all Empower registrants
- Let us look up customers as we spoke to them, then select their activity
- Used to collect notes on specific tests or general notes
- We had just as much fun building as we did being in Miami

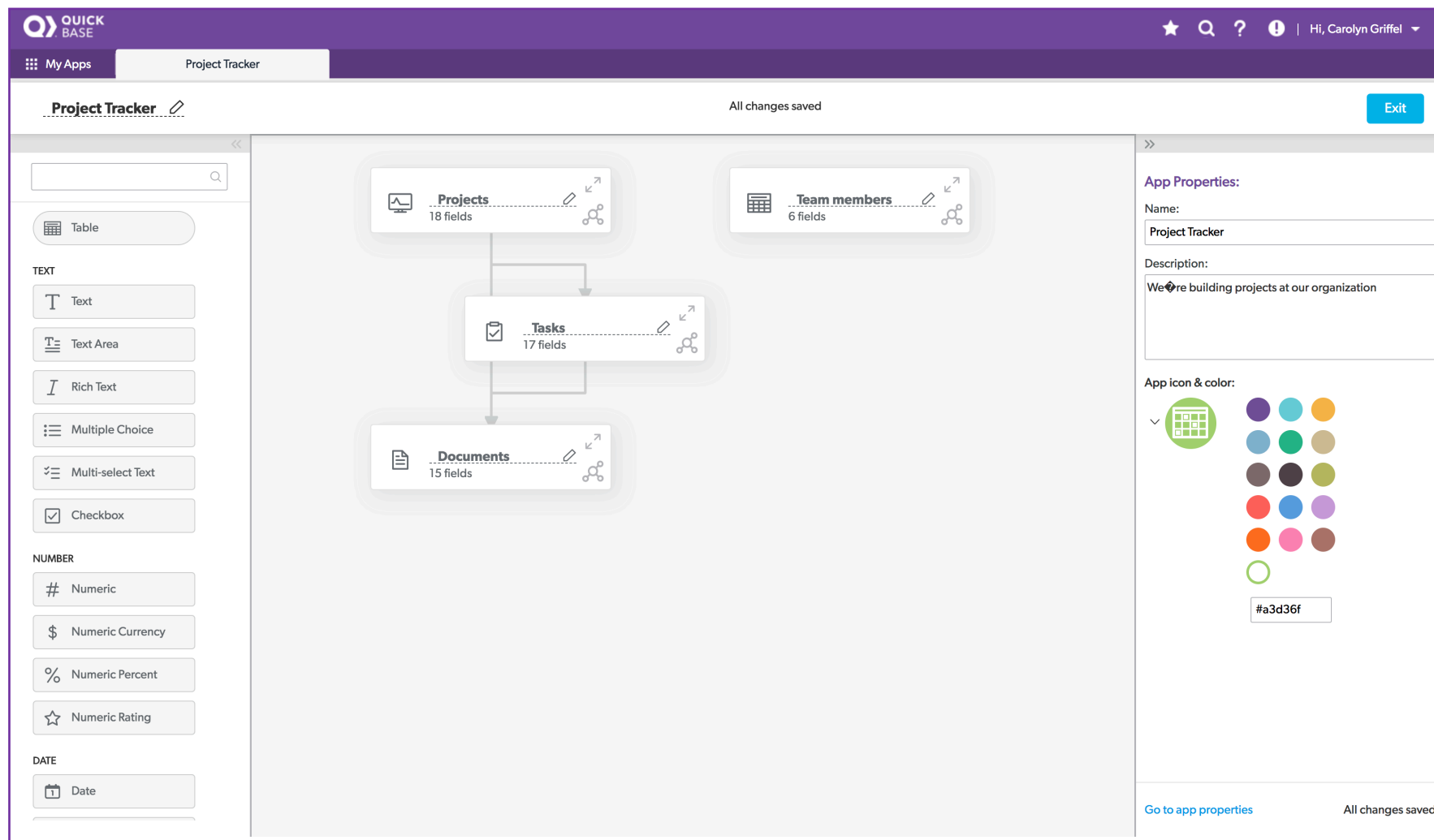
Pooof!



QUICK BASE
**Design
Lab**

station 01

Visual Builder

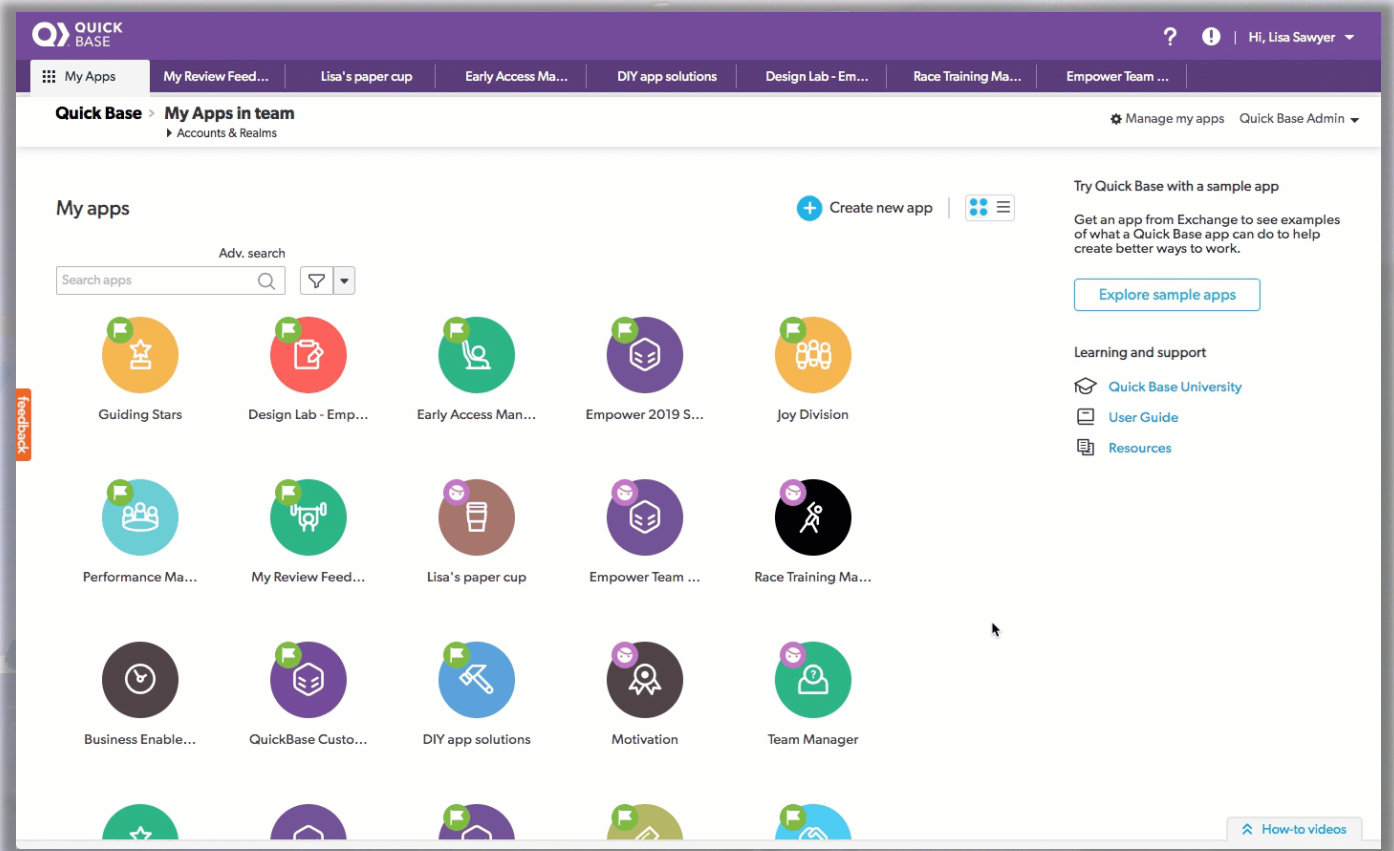


Goals for Visual Builder research

- Get feedback and reactions to a prototype for a new way of working with lookup & summary fields in the Visual Builder
- Talk to customers about the Visual Builder
 - Get impressions and feedback in general
 - Demo it for those who hadn't tried it yet
 - Watch customers use it

Visual Builder Demo

- Walked through both editing an existing app & creating an app from scratch
- Lisa talked about immediate next steps (cross-app, lookup/summary) & other features for handling larger apps that will come later.



Demo of create new app

Frequent questions during demo

"Can you edit an existing app?"

"Can you create relationships?"

"What about Cross-app relationships?"

"What's that 'Sputnik looking' icon?"

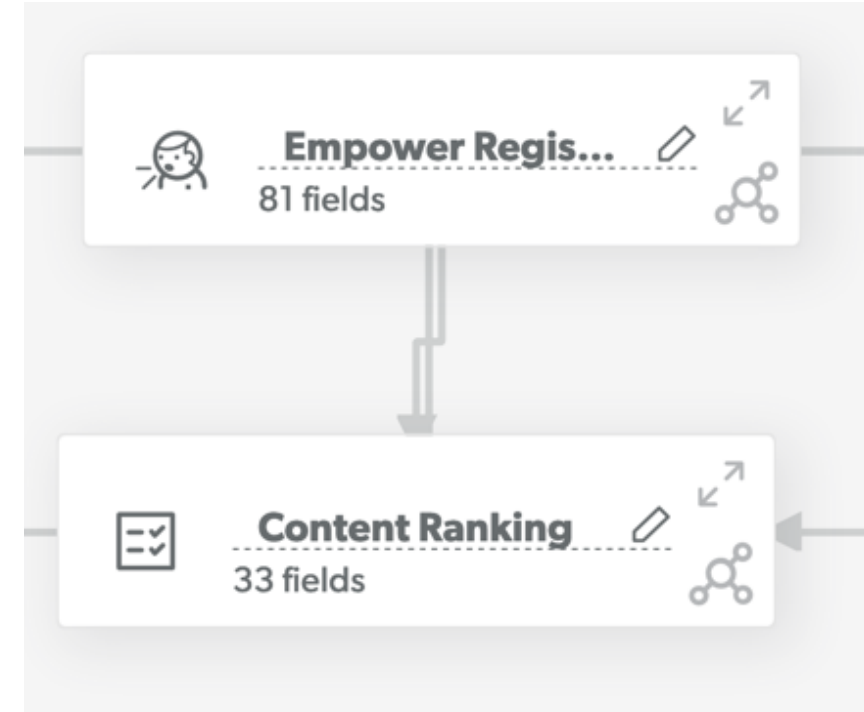
(Referring to the relationship icon in the bottom of each table card)

"What about forms?"

"And this is available NOW?"

Watched some customers use it

- Biggest usability issues observed:
 - The “expand” icon (top right corner) on the cards was not obvious
 - The relationship interaction - drag and drop to create - was not obvious
 - Frequently clicked on the pencil icon next to the table name to “edit” the table - IE: expand it to see the fields
- There are already stories in the BAT team’s backlog to handle these usability issues and/or work in progress that fixes them.



Completed task-based usability study

- 8 Customers completed some usability tasks for adding lookups and summary fields
 - 6 customers completed the lookup tasks & 5 customers completed the Summary tasks
 - Some customers completed both tasks, some only 1 or the other
- Builders who completed ranged from less than a year to more then 10 yrs building apps

Approximately when did you start using Quick Base?

Number of customers	Years building
1	Less than a year
5	2 - 3 years
1	5 years
1	11 years

Gauging their experience

The UX team asks some standard questions when speaking with builders in order to understand how comfortable they are building QB apps.

On a scale from 1-5 (1 being a newbie and 5 being Expert) how would you rate your app building skills?

Task	New Builders (1 or 2 on the scale)	Intermediate (3 on the scale)	Advanced Builders (4 or 5 on the scale)
Lookup task (6 customers)	1 customer	3 customers	2 customers
Summary task (5 customers)	2 customers	1 customer	2 customers

Good to note:

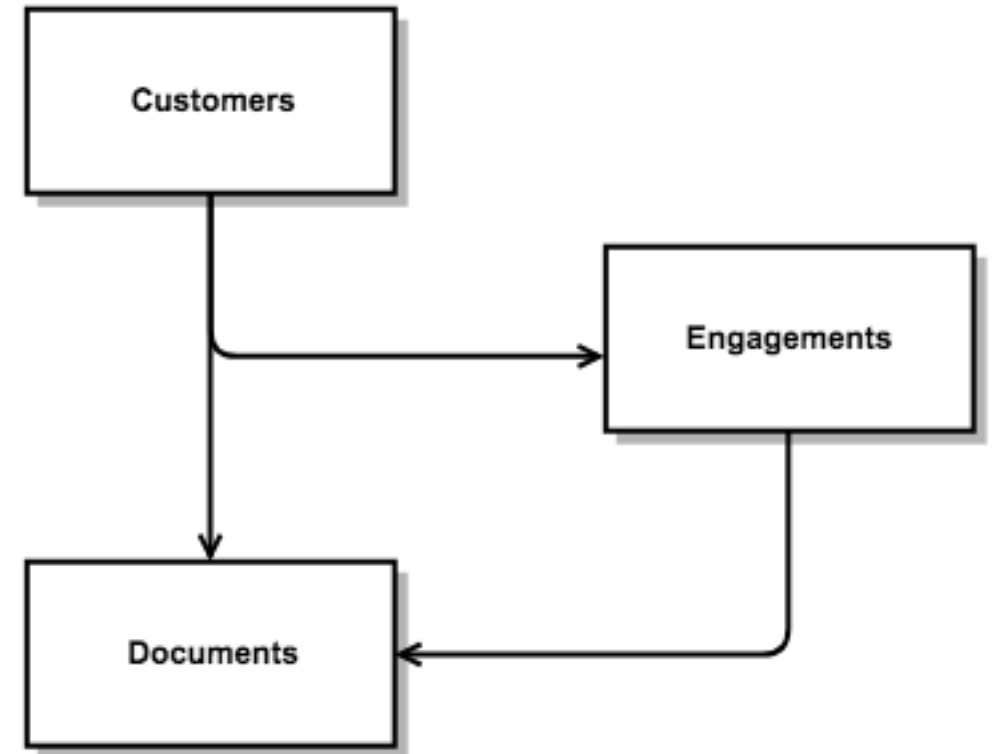
The BAT team chose to test the SIMPLEST of interactions. These interactions were the ones that very new builders naturally did in early testing.

The audience at Empower are generally more advanced.

Setup for tasks

Lisa showed each customer a (hypothetical) **Team Manager app** - with a list of Customers and a list of Engagements.

This example app helped document every time the support team spoke to a customer, they'd log it and associate that engagement with the correct customer.



Lookup task question

You want each of your team members to more easily see the contact information for each Engagement.

Your team has stated that the following fields would be helpful information to include:

- **Customer Primary Contact First Name**
- **Customer Primary contact Email Address**

How would you add that information using the Visual Builder prototype?

Lookup Prototype

Browser tabs: Edit - Design Spec - Lookup file, Home

Address bar: 127.0.0.1:32767/start.html#p=home&g=1&c=1

Bookmarks: Apps, Quick Base, QB research, Axure prototypes, FIOF, Competitors, Giphy's, Personal, Airtable, UX UX Planet, Medium, Standup Alice, UX, The best UX and..., Other Bookmarks

QUICK BASE | Hi, Lisa Sawyer

My Apps | Team Manager

Team Manager

Exit

Table

TEXT

- Text
- Text Area
- Rich Text
- Multiple Choice
- Multi-select Text
- Checkbox

NUMBER

- Numeric
- Numeric Currency
- Numeric Percent
- Numeric Rating

DATE

- Date
- Date Time

```
graph TD; Customers[Customers: 22 fields] --> Engagements[Engagements: 6 fields]; Engagements --> Documents[Documents: 8 fields]; Customers --> Documents;
```

The diagram illustrates a data model with three tables: Customers (22 fields), Engagements (6 fields), and Documents (8 fields). Arrows indicate relationships: Customers to Engagements, Engagements to Documents, and a direct relationship from Customers to Documents. Each table icon includes an edit icon and a share icon.

Table Properties:

Name: Customers

Description: Our company customers with contact info and other info

Icon: [People icon] [Edit icon]

Delete table

Help icon (?) | Pause icon | User icon

Lookup task results

- In general, customers seemed to learn how to add a Lookup field pretty easily.
- Some guidance would be helpful to catch the experienced customers who automatically go for the edit relationship area out of habit. In the properties of the relationship is an area where guidance will be added.
- **After customers showed their thinking on their own, Lisa showed the process. Customers were excited by how easy it is.**
- **Due to this new design pattern - assistance/guidance will be added to help builders know how.**

Some Customer Quotes

"**That's it??** I passed that test with flying colors!"

- Experienced builder
(no guidance needed)

"I could add **MORE THAN 3** lookups at once!?"

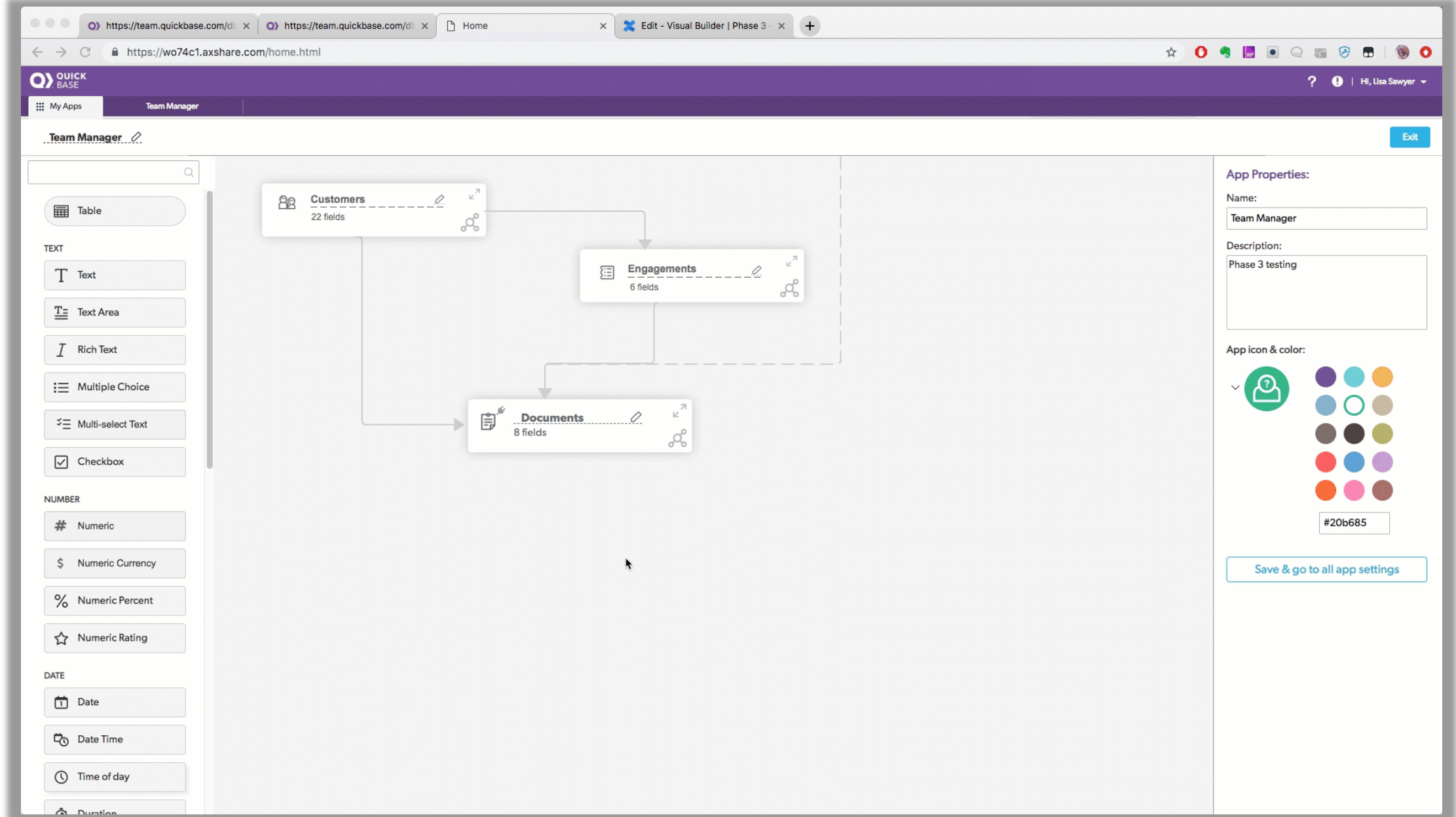
- Experienced builder

Summary task question

In order to better track resources, you want to see a rollup of how many times each Customer is being contacted by your team.

How would you add that information using the Visual Builder prototype?

Summary Prototype



Summary task results

- Adding summaries are not as intuitive to users, due to their natural additional complexity over lookup fields. Customers expected a more complex interaction. For example - a few expected to have to write a formula and looked for a "formula - summary" field to start the process.
- Some guidance would be helpful to catch the experienced customers who automatically go for the edit relationship area out of habit. In the properties of the relationship is an area where guidance will be added.
- **After customers showed their thinking on their own, Lisa showed the process. Customers were excited by how easy it is.**
- **Due to this new design pattern - assistance/guidance will be added to help builders know how.**

Some Customer Quotes

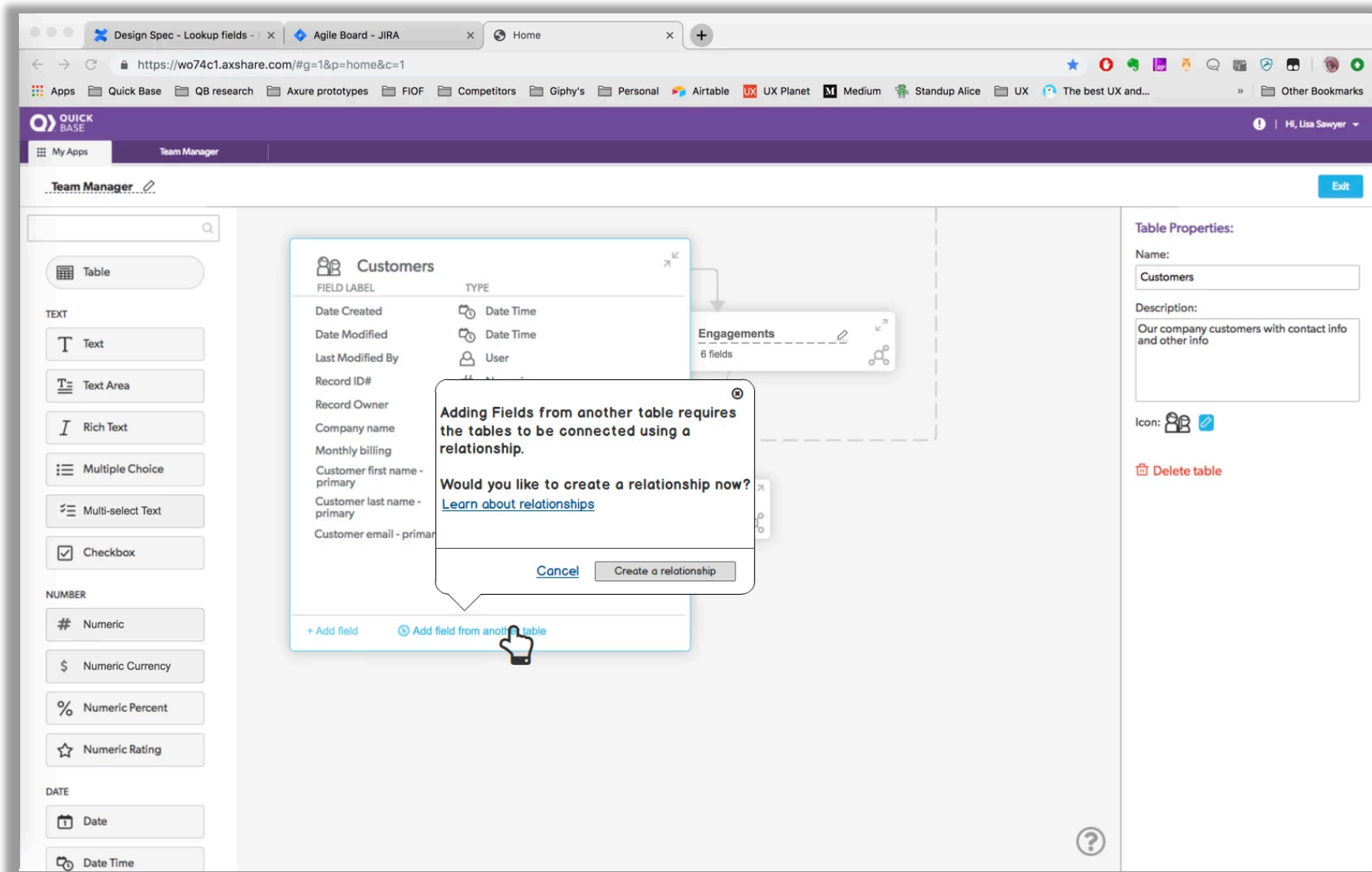
"Wait. That's it? That's so easy. I was **expecting it to be more complicated!**"

- Experienced builder
(After Lisa showed how)

"That wasn't the first thing I thought of, but that seems very intuitive. **Can I do that with a text summary, too?**"

- Experienced builder
(After Lisa showed how)

What about relationships?



Zap!



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station 02

Getting help

The screenshot displays the QuickBase Visual Builder interface. At the top, there's a navigation bar with 'My Apps' and 'Team Manager' tabs. Below this, the 'Team Manager' section is active, showing a search bar and a list of field types on the left sidebar. The main canvas shows a database schema diagram with three tables: 'Customers' (22 fields), 'Engagements' (6 fields), and 'Documents' (8 fields). Arrows indicate relationships between these tables. A 'Help' sidebar is open on the right, providing information about the Visual Builder tool.

Field Types:

- TEXT
 - Text
 - Text Area
 - Rich Text
 - Multiple Choice
 - Multi-select Text
 - Checkbox
- NUMBER
 - Numeric
 - Numeric Currency
 - Numeric Percent
 - Numeric Rating
- DATE
 - Date

Help Sidebar:

- Overview** | Field types | Relationships
- Visual Builder provides an alternate way to create and update apps. You can create tables, add fields, and connect relationships, all by dragging and dropping items onto the canvas.
- You can test out configurations to determine the best data model for an app.
- Note that when working with an existing app, changes in Visual Builder are saved immediately. When first trying out Visual Builder with an existing app, you may want to use a copy of your app.
- Current limitations**
Visual builder does not currently support the following:
 - Connected tables.** You cannot use Visual Builder to add connected tables. The Visual Builder shows existing connected tables in your app and you can add normal

Getting help

Planned activities / goals

- Content study (on getting help when stuck)
- Content ranking (of common Quick Base content resources)
- Visual Builder help prototypes

Unplanned activities

- Fielding all kinds of app-related questions
- Giving demonstrations of Visual Builder itself
- Dealing with stolen flamingos

20
total visitors

Content station visitors

	▼ Name	Job Title	Company Name
 	Alex Molochko	Application Specialist	DIRECT LINE INC
 	Brad Lemke	Production Engineer	Ready Cable, Inc.
 	Carl Wagner	Dtm	SYNOPSYS, INC.
 	Cullen Coates	CEO	PURE WATER TECHNOLOGIES
 	Daniel Pate	Database Administrator	RCP Integrity Services, Inc
 	Giuseppe Macri	Business Integration Coordinator	Community Health Centers
 	Jenn Weber	Remote Engineering Specialist	Rockwell Automation, Inc
 	John Freire	IT Director	DIRECT LINE INC
 	Kelly Ludwig	Associate Director, Learning and Development	Merck & Co., Inc
 	Kelly Stine	National Administrator	Work For Progress Inc
 	Laurie Layton	Digital Strategy & Governance Manager	Quick Base Builder Plan H
 	Matthew Bularzik	Head of Quality	Nexcelom Bioscience LLC
 	Maxime Krief	It Manager	American Municipal Secu
 	MCF Neil	Senior Developer	Charter Home Alliance LL
 	Molly Neidhardt	Office Manager	Stonybrook Water Compa
 	Nicholas Pelligra	Director of Operations	Empower U.

Content study questions

1. When was the last time you got stuck trying to do something in Quick Base?
2. What were you trying to do when you got stuck?
3. What did you try to do to get unstuck, and why?
4. Did that give you the information you were looking for?
5. Were you able to unstick yourself?
6. On a scale of 1-5... How would you rate how easy it is to find the answers you need when you get stuck in Quick Base?
7. Have you gotten frustrated finding the answer you need? What was frustrating for you?
8. What do you do when you get stuck with other software products?

Q2: What were you trying to do when you got stuck?

Formulas

Figuring out specific formula syntax. Don't get stuck on basic functions, need specific help with complex formulas.

Automations

I have a task generation tool that works outside of Quick Base. When you guys created automations, I tried to use automations to do the same things, that's all it's doing is coming in when a task is finished, duplicates it, rolls it up so it never does it again.

[with automations] you can copy the tasks, but when you come back into the old one, and work on it so it never regenerates again, creates an infinite loop. I've worked you guys tech support and so forth, and it's still not fixed. We still haven't come up with anything.

Reports

I was trying to build out like a grid edit form, I guess. There was just too many values on the form when I was trying to grid edit and I couldn't see anything. It was too big.

Reports

I wasn't able to create a summary table. So essentially I had to make all of the precalculated fields ahead of time, make the table in HTML, and present it as a download.

Relationships

So I was trying to fix a problem that somebody else had, they had created an incorrect relationship.

I had it because they gave it to me. Someone else had created an incorrect relationship.

Notifications

I need to be able to send emails outside of Quick Base, which I think is exclusive to the Notification function

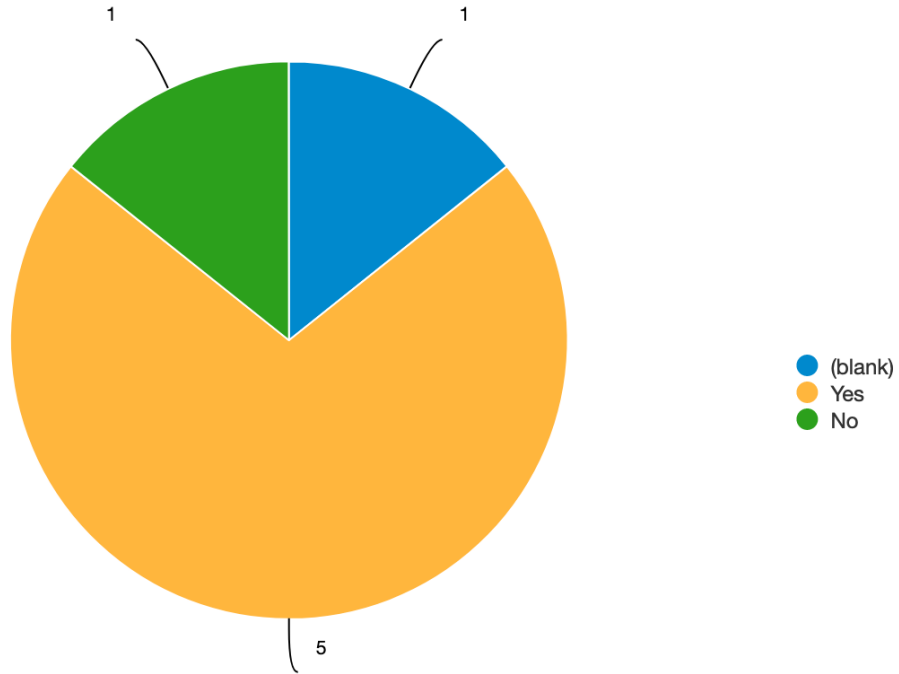
I want it to be more time-sensitive information, not based on when something is modified.

So, I was like telling Lisa, if they could get reminders and notifications to like, have a baby.

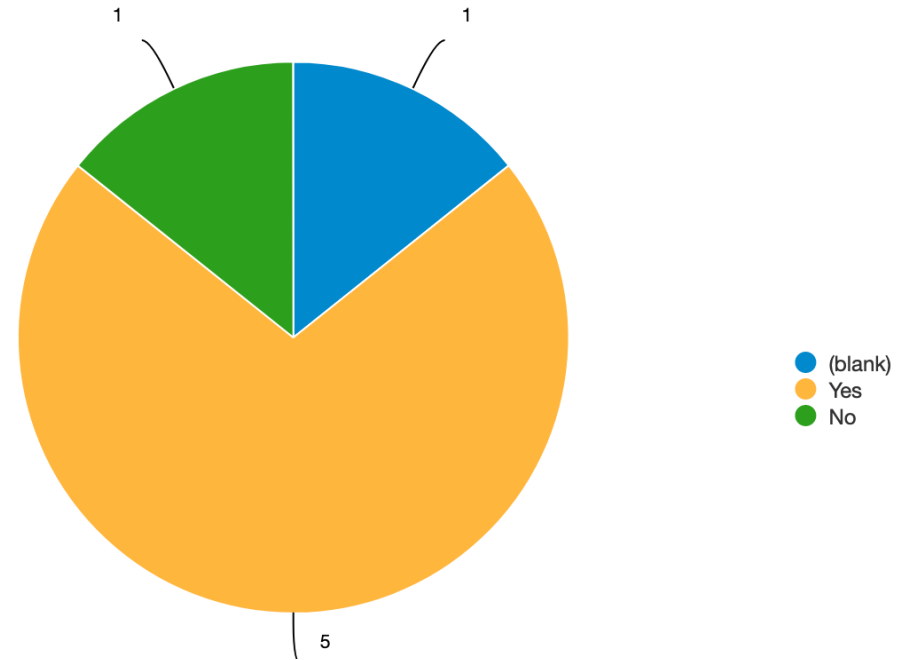
Q3: What did you try to do to get unstuck

- Use Google with specific strings to get answers, usually from Kirk Trachy. Get really good results from Google. Keep doing what you're doing to index search because improvements have been made.
- Trying different things. I must have tweaked the automation a hundred times. It keeps running in a loop.
- Searched for image onload.
- Set up a help desk.
- I've been waiting to come here [to Empower]

Q4: Did that give you the information you were looking for?

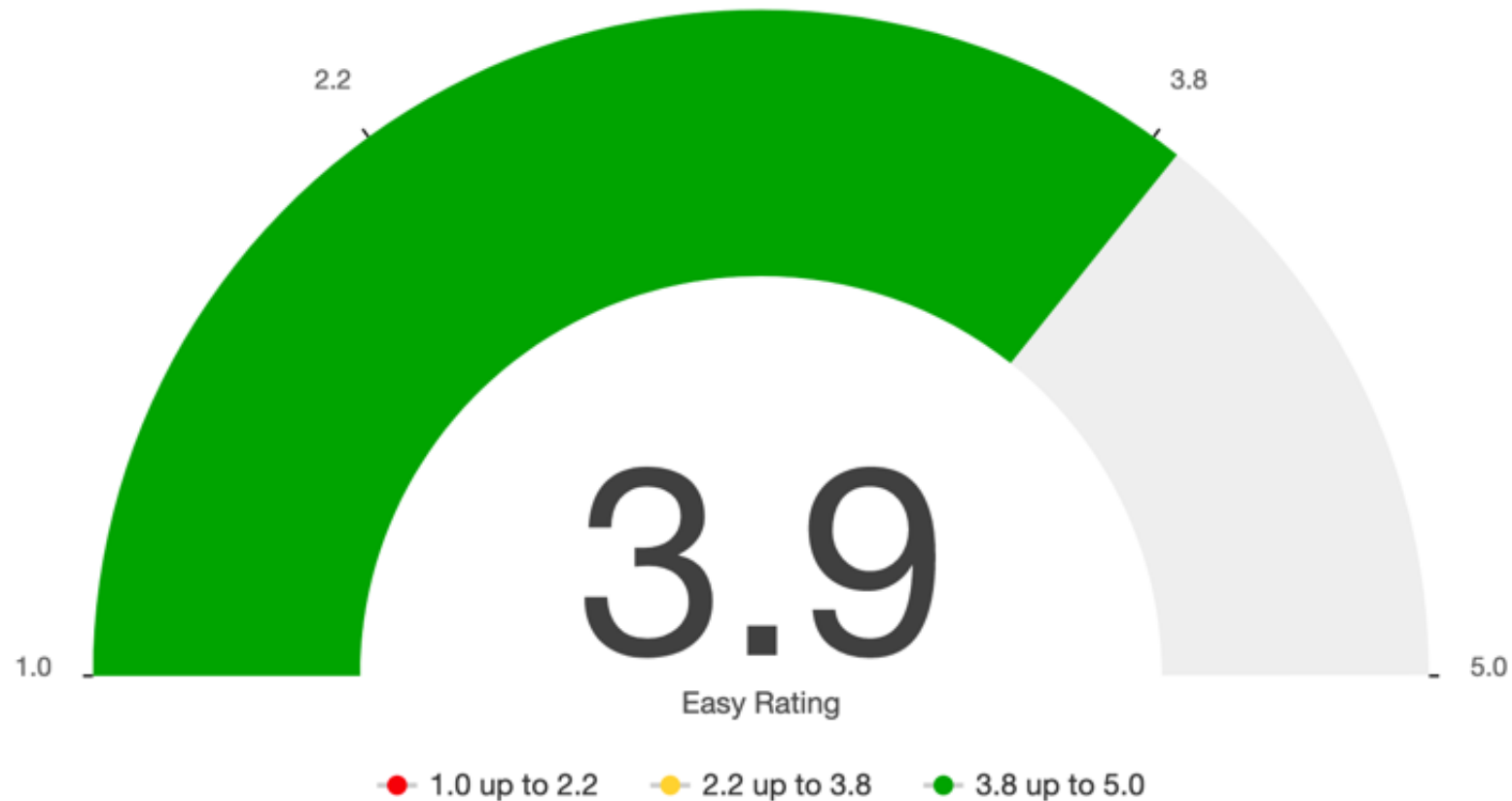


Q5: Were you able to unstick yourself?

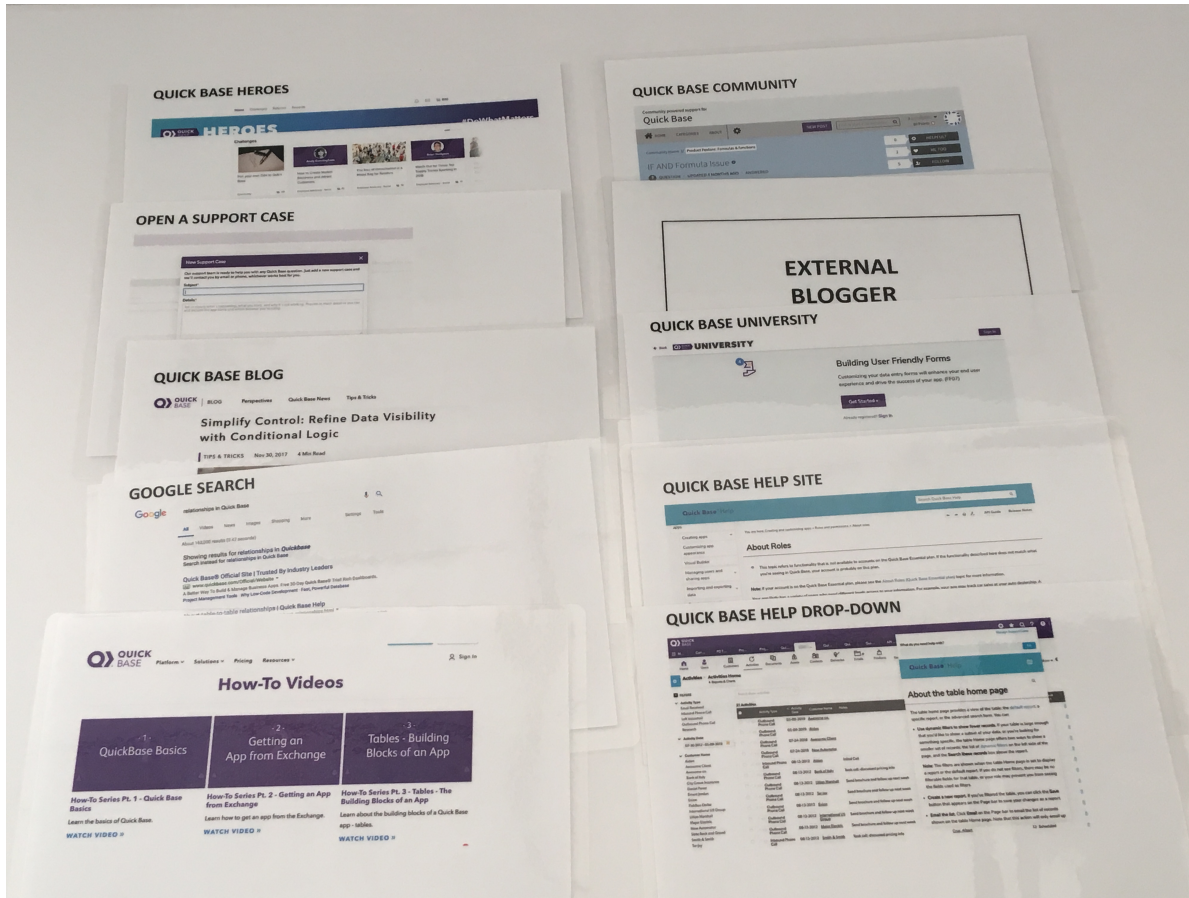


Q6: How would you rate how easy it is to find the answers you need?

On a scale of 1 (not at all) to 5 (very), how would you rate how easy it is to find the answers you need when you get stuck in Quick Base?

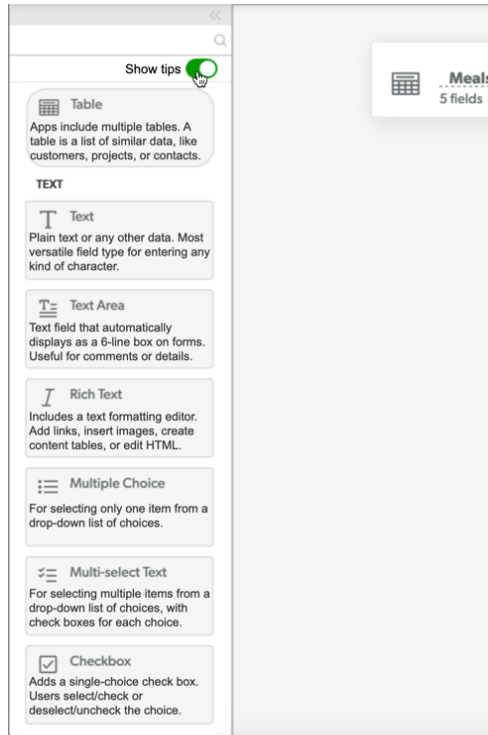


Content ranking results



Rank	Card	Weighted score
1	Support case	38
2	Community	36
3	Help Site	28
4	Google	24
5	Help Menu	20
6	University	18
7	Heroes	12
8	External Blogger	8
9	How-to Videos	7

Visual Builder help prototypes



The screenshot shows a 'Help' window with a table of field types. The table has three columns: 'Field type', 'Description', and 'Usage'. The table lists several field types: 'Text', 'Text - multi-line', and 'Rich text'. Each field type has a corresponding description and usage information.

Field type	Description	Usage
Text	Plain text or any other data. Most versatile field type for entering any kind of character. You can also limit the length of entries.	
Text - multi-line	Text field that automatically displays as a 6-line box on forms. Useful for longer amounts of data like comments, notes, or details.	
Rich text	Includes an editor for content formatting. Use to format text, add links, insert images, create	

Maybe a history of your searches might be helpful.

That is awesome!

That's great. Like it. That's sweet. **Is this the Visual Builder?**

I like that it can expand for when you really want to read it. I also like that it can be docked on the side.

Can the definitions be on hover? That would be helpful and I don't need to see them all the time.

I rarely need to use Quick Base documentation.

Other discussions

Paid this guy
"Best user guide
in the industry."

Visual Builder demo
Discussed how new builders in his group don't want to think about tables. Maybe the containers in VB could be called something else for different users. Showed him guided app flow as a tool for new builders to get a sample quickly.

API-ish
Asked if the "hidden" QB api calls, which are exposed on all pages, could be officially documented. This would allow MCF to insert custom code into the same UI structure. Examples are QBAAlert, QBUndefined, etc.

Globalization
Wants simplified Chinese UI to help with remote teams using Quick Base.

Form building
Talked about how hard it is to create surveys in Quick Base, if she is doing it right or not. We also tried to help her with if address fields have options to just collect zip code or city, state (answer: no).

Grid edit
Issue being unable to copy formula fields in grid edit. Putting a report into grid edit, unable to copy. Get a message that formula fields cannot be copied. Said he's tried to get this fixed a number of times.

station 03

New grid for reports

Tasks > Grouped by project, no filters											
Reports & Charts											
+ New Task ☆ Favorite Try new report											
22 tasks											
TASK	PRIORITY	STATUS	START	M...	HOURS	% COMPLETE	PROJECTED FINISH	DATE COMP...	ASSIGNED TO	ACTUAL COST	BL
Filter by task											
Customer Service System Update (12 tasks)											
Planning (4 tasks)											
End user feedback	High	Completed	06-08-2019		10	100%	06-11-2019	06-08-2019	Chris Baker	\$170	\$29
ROI assessment	High	In-Progress	06-12-2019		5	60%	06-14-2019		Colleen Garton	\$30	\$4
Prototype	High	In-Progress	06-17-2019		10	50%	06-20-2019		Colleen Garton	\$20	\$3
Storyboard	High	Not Started	07-10-2019		2	10%	07-11-2019		Colleen Garton	\$220	\$20
TOT					27					\$440	\$56
> Development (7 tasks)											
> Testing (1 task)											
Deploy Document Management (8 tasks)											
Planning (2 tasks)											
Meet with client team	Medium	Completed	05-08-2019		4	100%	05-13-2019	05-08-2019	Chris Baker	\$17	\$29
Usability testing	High	Not Started	05-29-2019		7	60%	06-06-2019		Gregory Baxter	\$30	\$4
TOT					11					\$47	\$33
> Development (3 tasks)											
> Design (2 tasks)											
> Testing (1 task)											
> Finance system upgrade (2 tasks)											
> Increase Web Presence (8 tasks)											
> T3 install (8 tasks)											
> Wireless initiative (3 tasks)											
TOT					192					\$2,219	\$5,21

New grid for reports

Interviews with a dozen customers

- Full-screen view
- Editing
- Filters
- Show totals, hide records
- Color coding

Posters

Your thoughts on...

Quick edits next to the new grid

GOAL
Our new grid should let you know exactly what you're editing.

BENEFIT
Modern, Adjustable, Flexible, Workflow

SIDEBAR

What about **Sidebar** or **Pop-up** is important to you, and what's missing? Add stickies below.

- Inspect a record by selecting it
- Shift-click to inspect multiple records
- Sidebar can show more info than report
- Sidebar can stay open after you save

POP-UP

What about **Sidebar** or **Pop-up** is important to you, and what's missing? Add stickies below.

- Inspect a record by selecting it
- Pop-up can show more info than report
- Pop-up always closes when you save

For more about the grid, come to
Next Generation of Quick Base Table Reports
Wednesday, 4:15pm in Glitter, 4th Floor

Your thoughts on...

Editing in the new grid

GOAL
Our new grid should let you edit in familiar, easy ways.

BENEFIT
Modern, Adjustable, Flexible, Workflow

ONE AT A TIME

What about **One At A Time** or **Spreadsheet** is important to you, and what's missing? Add stickies below.

- Create or edit one record at a time
- Record is saved when you click or move to next row

SPREADSHEET

What about **One At A Time** or **Spreadsheet** is important to you, and what's missing? Add stickies below.

- Select columns, rows, or both
- Use clipboard actions like Fill down
- Entire page is saved when you click

For more about the grid, come to
Next Generation of Quick Base Table Reports
Wednesday, 4:15pm in Glitter, 4th Floor

Your thoughts on...

Filtering in the new grid

GOAL
Our new grid should have filtering that is more flexible, powerful, and space-saving.

BENEFIT
Modern, Adjustable, Flexible, Workflow

FILTER BY COLUMN

What about these two filtering schemes is important to you, and what's missing? Add stickies below.

- Filter on any field using filter bar
- Type your own filtering terms
- Use dropdowns or pickers for your terms

DYNAMIC FILTERS (TODAY)

What about these two filtering schemes is important to you, and what's missing? Add stickies below.

- Filter controls are next to the report
- Filter on 5 fields built into the report
- Use lists to select what to filter on

For more about the grid, come to
Next Generation of Quick Base Table Reports
Wednesday, 4:15pm in Glitter, 4th Floor

Full-screen view

The screenshot shows a software interface with a purple header bar containing navigation icons and the user name 'Hi, Andrew Kleppner'. Below the header is a 'New App' button and a 'Document Library' section. A 'View Full Screen' button is highlighted with a red box. Below the button is a video player showing two men, with the name 'Pierre Gouvin' visible at the bottom. To the right of the video player is a table with columns 'START', 'CALCULATED FINISH DATE', 'DAYS OVE...', and 'COMPLETE'.

START	CALCULATED FINISH DATE	DAYS OVE...	COMPLETE
04-2008	09-09-2008		100%
17-2008	09-19-2008		100%
10-2008	11-11-2008		100%
04-2008	09-04-2008		100%
06-2008	09-19-2008		100%
11-2008	08-26-2008		100%

"The page is custom-designed to fit the person's screen size"
Alex M.

"I'd like it so that our end-users don't need those buttons [across the top] at all"
Pierre G.

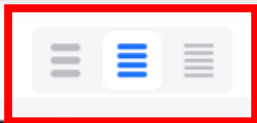
"[I would like it because] I do screen shots"
Victoria Y.

"Having the option to go large helps"
Aaron Z.

The screenshot shows a software interface with a white header bar containing navigation icons and the user name 'Hi, Andrew Kleppner'. Below the header is a 'New App' button and a 'Document Library' section. A 'View Full Screen' button is highlighted with a red box. Below the button is a video player showing two men, with the name 'Pierre Gouvin' visible at the bottom. To the right of the video player is a table with columns 'START', 'CALCULATED FINISH DATE', 'DAYS OVE...', and 'COMPLETE'.

PROJECT PH...	TASK NAME	DUR...	MILE...	START	CALCULATED FINISH DATE	DAYS OVE...	STATUS	PRIORITY	ASSIGNED TO	% COMPLETE
Development	Upgrade DBMS	4	<input checked="" type="checkbox"/>	09-04-2008	09-09-2008		Completed	High	Baker, Chris	100%
Development	Install latest version of Finan...	3	<input type="checkbox"/>	09-17-2008	09-19-2008		Completed	High	Baker, Chris	100%
Development	Switch to T3	2	<input checked="" type="checkbox"/>	11-10-2008	11-11-2008		Completed	Medium	Garton, Coll...	100%
Planning	Project Approval	0	<input checked="" type="checkbox"/>	09-04-2008	09-04-2008		Completed	Low	Baxter, Greg...	100%
Planning	Server purchase	10	<input type="checkbox"/>	09-06-2008	09-19-2008		Completed	High	Tandon, Aashri	100%
Planning	Workstation purchase	12	<input type="checkbox"/>	09-11-2008	09-26-2008		Completed	High	Baker, Chris	100%
Development	Server installation	3	<input type="checkbox"/>	10-02-2008	10-06-2008	3899 days	Not Started	Low	Tandon, Aashri	
Development	Workstation installation	2	<input type="checkbox"/>	10-04-2008	10-07-2008	3898 days	Not Started	Low	Tandon, Aashri	
Planning	Client review	4	<input type="checkbox"/>	10-08-2008	10-13-2008		Completed	Low	Baxter, Greg...	30%
Test	System test	3	<input type="checkbox"/>	11-13-2008	11-17-2008	3857 days	Not Started	Low	Baker, Chris	
Test	Total system conversion	4	<input type="checkbox"/>	11-28-2008	12-03-2008	3841 days	Not Started	Low	Cruz, Albert	
Planning	Requirements review	2	<input type="checkbox"/>	11-04-2008	11-05-2008		Completed	High	Baxter, Greg...	100%
Planning	Develop RFP	2	<input type="checkbox"/>	11-04-2008	11-05-2008		Completed	Medium	Baxter, Greg...	100%
Planning	Vendor selection	3	<input type="checkbox"/>	11-23-2008	11-26-2008		Completed	Medium	Tandon, Aashri	
Development	Buy application of choice	5	<input type="checkbox"/>	11-29-2008	12-05-2008		Completed	Medium	Tandon, Aashri	
Development	Install 5 clients	3	<input type="checkbox"/>	12-24-2008	12-26-2008	3818 days	Not Started	Low	Tandon, Aashri	
Development	Install server side package	2	<input type="checkbox"/>	12-28-2008	12-30-2008	3814 days	Not Started	Medium	Baker, Chris	
Test	Post install debug and support	4	<input type="checkbox"/>	01-01-2009	01-06-2009	3807 days	Not Started	High	Tandon, Aashri	
Test	Train engineering team on u...	3	<input type="checkbox"/>	01-07-2009	01-09-2009	3804 days	Not Started	Low	Garton, Coll...	
Planning	Meet with client team	4	<input checked="" type="checkbox"/>	09-24-2008	09-29-2008		Completed	Medium	Baxter, Greg...	100%
Design	Client review	2	<input type="checkbox"/>	10-15-2008	10-16-2008		Completed	Medium	Baxter, Greg...	100%
Development	Revise based on feedback	5	<input type="checkbox"/>	10-19-2008	10-24-2008	3881 days	Not Started	Medium	Garton, Coll...	
Development	Design 1	3	<input type="checkbox"/>	10-22-2008	10-24-2008		Completed	Medium	Baxter, Greg...	100%
Development	Deploy redesign	3	<input type="checkbox"/>	10-27-2008	10-29-2008		Completed	Low	Baker, Chris	100%
Test	Design 2	5	<input type="checkbox"/>	10-28-2008	11-03-2008	3871 days	On Hold	Low	Tandon, Aashri	
Planning	Usability testing	7	<input type="checkbox"/>	08-14-2009	08-24-2009	3577 days	Not Started	High	Tandon, Aashri	

Display density



Tasks > Task report
Reports & Charts

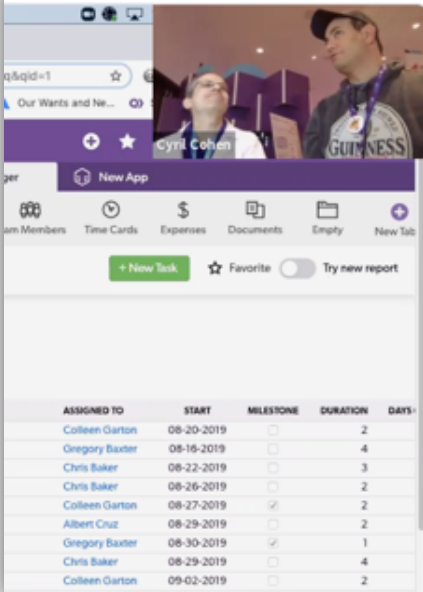
41 tasks

Filter

PROJECT NAME	STATUS	TASK NAME
Customer Service System Update	Completed	Approval
Customer Service System Update	In-Progress	Server purchase
Customer Service System Update	In-Progress	Workstation purchase
Customer Service System Update	Not Started	Server installation
Customer Service System Update	Not Started	Workstation installation
Customer Service System Update	Not Started	Client review

"[The loose one] is easier to understand, easier to view, easier on the eye"

Alex M.



Audio Transcript

Search transcript

mark there. Yes, we must have a space without a spider. But it's tighter. I like it. Um,

05:23 Is there a reason why you're on all caps and you're willing lowercase. And the reason is Alfonso

05:30 officials decided

05:33 **To have a baby in this screen.**

05:36 Right, well, it's also do screen when you're

ASSIGNED TO	START	MILESTONE	DURATION	DAYS
Colleen Garton	08-20-2019	<input type="checkbox"/>	2	
Gregory Baxter	08-16-2019	<input type="checkbox"/>	4	
Chris Baker	08-22-2019	<input type="checkbox"/>	3	
Chris Baker	08-26-2019	<input type="checkbox"/>	2	
Colleen Garton	08-27-2019	<input checked="" type="checkbox"/>	2	
Albert Cruz	08-29-2019	<input type="checkbox"/>	2	
Gregory Baxter	08-30-2019	<input checked="" type="checkbox"/>	1	
Chris Baker	08-29-2019	<input type="checkbox"/>	4	
Colleen Garton	09-02-2019	<input type="checkbox"/>	2	
Albert Cruz	09-02-2019	<input type="checkbox"/>	3	

Transition from viewing to editing

QUICK BASE

Hi, Andrew Kleppner

My Apps | Backup | Complete Project Manager | New App

Home | Users | Projects | Tasks | Customers | Team Members | Time Cards | Expenses | Documents | Empty | Long table | New Table

Tasks > Edit the tasks | Save | Apply Changes | Cancel | Customize this Report

New Task | More

Task Name	Assigned To	Start	Milestone	Duration (Days)	Days Overdue	Priority	Complete	Actual Cost	Remaining Budget
Alpha test	Andrew Waltham	10-12-2019	<input checked="" type="checkbox"/>	3		High	20%		
Beta test	Albert Cruz	10-17-2019	<input checked="" type="checkbox"/>	3		Medium	20%		
Integration testing	Chris Baker	11-13-2019	<input checked="" type="checkbox"/>	5		Medium			
Customer Service System Update	Gregory Baxter	09-28-2019	<input type="checkbox"/>	5		Medium	10%	2,000.00	\$550.00 \$145

Feedback Comments:

- "No problem, I think it's well designed." - Cyril C.
- "Grid edit doesn't follow our dynamic rules" - Alex M.
- "I need a permission that lets people create [time cards] but not modify" - Victoria Y.
- "I would probably shut it off [if it were too easy to have accidents]" - Max K.

Tasks					
Home Insert Draw Page Layout Formulas Data Review View					
R40					
	A	B	C	D	E
	Project Name	Project Phase	Task Name	Start	Milestone
1					
2	Customer Service System Update	Planning	End user feedback	9/8/19	no
3	Customer Service System Update	Planning	ROI assessment	9/12/19	no
4	Customer Service System Update	Development	Deployment plan	9/17/19	yes
5	Customer Service System Update	Planning	Prototype	9/22/19	no
6	Customer Service System Update	Development	Unit test	9/28/19	no
7	Customer Service System Update	Development	Network Topology design	10/7/19	no
8	Customer Service System Update	Development	Alpha test	10/12/19	yes
9	Customer Service System Update	Development	Beta test	10/17/19	yes
10	Customer Service System Update	Testing	Post deployment	10/22/19	no
11	Customer Service System Update	Planning	Storyboard	10/31/19	no

Project Tasks					
Imported table					
Grid 2 3 hidden fields Filter Grouped by 2 fields Sort Color					
Task Name Start Milestone Assigned To					
PROJECT NAME					
Customer Service System		Count 12			
STATUS					
Completed		2			
1	End user feedback	9/8/2019			Chris Baker <1001.v2xw>
2	Design applications	11/4/2019			Chris Baker <1001.v2xw>
+					
STATUS					
In-Progress		4			
3	ROI assessment	9/12/2019			Colleen Garton <1003.bar...

Toy Store					
Home Dashboards Toys Toy Manufacturers					
Project Tasks					
All					
41 items • Sorted by Task Name • Filtered by all project tasks • Updated a few seconds ago					
	TASK NAME	STATUS	START	ASSIGNED TO	
1	Alpha test	Not Started	6/22/2019		
2	Approval	Completed	5/10/2019		
3	Arrange switchover date				
4	Buy application of ch...	Not Started	5/22/2019		
5	Buy application of ch...	Completed	4/5/2019		
6	Client review	In-Progress	6/3/2019		

Toy Store					
Home Dashboards Toys Toy Manufacturers Toy Distributors					
REPORT: PROJECTS WITH PROJECT TASKS					
Tasks grouped by project and status					
Total Records	Total Milestone	Total Duration (Days)	Total Days Overdue	Total % Complete	Total Labor Cost
41	10	135	1,099	690%	\$0
Project: Project Name	Status	Project Task: Task Name	Assigned To	Start	Milestone
Wireless initiative (3)	In-Progress	Upgrade DBMS	-	6/19/2019	
	In-Progress	Install latest version 7.1	-	5/10/2019	
	In-Progress	Switch to T3	-	6/3/2019	
Subtotal					1
T3 install (8)	In-Progress	Requirements review	-	6/3/2019	
	In-Progress	Develop RFP	-	5/10/2019	
	In-Progress	Buy application of choice	-	4/5/2019	

Filters

QUICK BASE

My Apps Backup Complete Project Manager New App

Home Users Projects Tasks Customers Team Members Time Cards Expenses Documents Empty Long table New Table

Tasks > Numbers by project, status

Search these tasks

Grouped by project and then by status

41 tasks

FILTERS

- Project Name
 - Customer Service System Update
 - Deploy Document Management
 - Finance system upgrade
 - Increase Web Presence
 - T3 install
 - Wireless Initiative
- Status
 - Completed
 - In-Progress
 - Issue
 - Not Started
- Task Name
 - Alpha test
 - Approval
 - Arrange switchover date
 - Beta test
 - Buy application of choice
 - Client review
 - Deploy redesign
 - Deployment plan

TASK NAME	ASSIGNED TO	START	MILESTONE	DURATION	DAYS OVERDUE	PRIORITY	% COMPLETE	DATE COMPLETE
Customer Service System Update (12 tasks)								
Not Started (6 tasks)								
Network Topology design	Chris Baker	10-07-2019		3		Low	100%	
Alpha test	Andrew Waltham	10-12-2019		3		High	20%	
Beta test	Albert Cruz	10-17-2019		3		Medium	20%	
Post deployment	Chris Baker						10%	
Storyboard	Colleen Gahan						10%	
Integration testing	Chris Baker							
TOT							27%	
In-Progress (4 tasks)								
ROI assessment	Colleen Gahan						20%	
Deployment plan	Andrew Waltham						20%	
Prototype	Colleen Gahan						10%	

Alex Morales

QUICK BASE

My Apps Backup Complete Project Manager New App

Home Users Projects Tasks Customers Team Members Time Cards Expenses Documents Empty Long table New Table

Tasks > Numbers by project, status

Search these tasks

Grouped by project and then by status

41 tasks

TASK NAME	ASSIGNED TO	START	MILESTONE	DURATION	DAYS OVERDUE	PRIORITY	% COMPLETE	DATE COMPLETE	LABOR COSTS	BUDGET \$
Customer Service System Update (12 tasks)										
Not Started (6 tasks)										
Network Topology design	Chris Baker	10-07-2019		3		Low	100%		\$100.00	
Alpha test	Andrew Waltham	10-12-2019		3		High	20%		\$300.00	
Beta test	Albert Cruz	10-17-2019		3		Medium	20%		\$150.00	
Post deployment	Chris Baker						10%		\$100.00	
Storyboard	Colleen Gahan						10%		\$100.00	
Integration testing	Chris Baker								\$1,000.00	
TOT							77%		\$1,750.00	
In-Progress (4 tasks)										
ROI assessment	Colleen Gahan						20%		\$250.00	
Deployment plan	Andrew Waltham						20%		\$750.00	

Aaron Zielinski

"I just love what you've done on the left. You've done a good job there."

Cyril C.

"If there's a way we can have more than five filters, that would be amazing"

Alex M.

"Most people are Excel users, so that's a very easy transition. [People say the current filters] are too long."

Victoria Y.


"Instead of having 3 or 4 versions of the report with different filters, I can have 1 that I can slice and dice"

Aaron Z.

Show totals, hide records

28 orders

FLAVOR	UNITS	PRICE	ORDER	BUYER
Troop A (8 orders)				
Patrick (5 orders)				
Mint with chocolate coating	5	\$8	\$40	Amy Arthur
Chocolate with orange creme filling	1	\$10	\$10	Billy Babson
Peanut butter	6	\$5	\$30	Billy Babson
Chocolate	1	\$10	\$10	Brandon Bowes
Peanut butter gumballs covered in nuts	6	\$5	\$30	Brandon Bowes
TOT	19	\$120		
AVG				
Marcia (3 orders)				
Mint creme sandwiched by				Eryl Chester
Chocolate and coconut				Arleen Daniels
Minty nougat with caramel				Arleen Daniels
TOT				
AVG				



Victoria Yusfin

\$66.67



"I really like that. The grouping has been a pain the neck, for just that reason."

Pierre G.

"I don't use averages, [so I'd like totals right in the headers]"

Victoria Y.

"That would save us from having to use two different reports"

Max K.

28 orders

FLAVOR	UNITS	PRICE	ORDER	BUYER
Troop A (8 orders)				
Patrick (5 orders)				
TOT	19		\$120	
AVG			\$24	
Marcia (3 orders)				
TOT	22		\$200	
AVG			\$66.67	
Troop B (3 orders)				
George (3 orders)				
TOT	12		\$80	
AVG			\$26.67	
Troop C (17 orders)				
Jerry (5 orders)				
TOT	19		\$120	
AVG			\$24	
Li (12 orders)				
TOT	68		\$560	
AVG			\$32.94	
Grand total	121		\$960	
Overall average			\$34.28	

Color coding

CUSTOMER NAME	CUST. ID#	ENROLLMEN...	CITY	STATE	ADD CONTACT
● Daniel Ray	24111648	Dec 1, 2017	Boston	MA	Add Contact
Delia Carroll	54747847	Apr 4, 2018	Topeka	KA	Add Contact
● Bertie Shaw	54322263	Apr 5, 2018	Topeka	WA	Add Contact
Lucie Garza	52001261	Jan 24, 2017	Las Vegas	NV	Add Contact
Alta Rodriquez	54309879	July 1, 2018	San Francisco	CA	Add Contact
● Addie Lamb	52000577	Aug 7 2018	San Francisco	CA	Add Contact
Bernard Reed	00012156	Feb 18, 2017	Portland	OR	Add Contact
Lora Greer	54812426	May 29, 2018	Sacramento	CA	Add Contact
Olive Warren	00011457	Dec 8, 2017	Cambridge	MA	Add Contact

"I definitely need something like this, because certain things have to really stand out."
Cyril C.

"We use [full color rows, only] for grouping"
Alex M.

"People would get used to it either way"
Pierre G.

CUSTOMER NAME	CUST. ID#	ENROLLMEN...	STATE	ADD CONTACT
● Daniel Ray	24111648	Dec 1, 2017	MA	Add Contact
Delia Carroll	54747847	Apr 4, 2018	KA	Add Contact
● Bertie Shaw	54322263	Apr 5, 2018	WA	Add Contact
Lucie Garza	52001261	Jan 24, 2017	NV	Add Contact
Alta Rodriquez	54309879	July 1, 2018	CA	Add Contact
● Addie Lamb			CA	Add Contact
Bernard Re			OR	Add Contact
Lora Greer			CA	Add Contact
Olive Warr			MA	Add Contact

"Showing it prominently is important"
Victoria Y.

"I'd like the ability to choose"
Aaron Z.

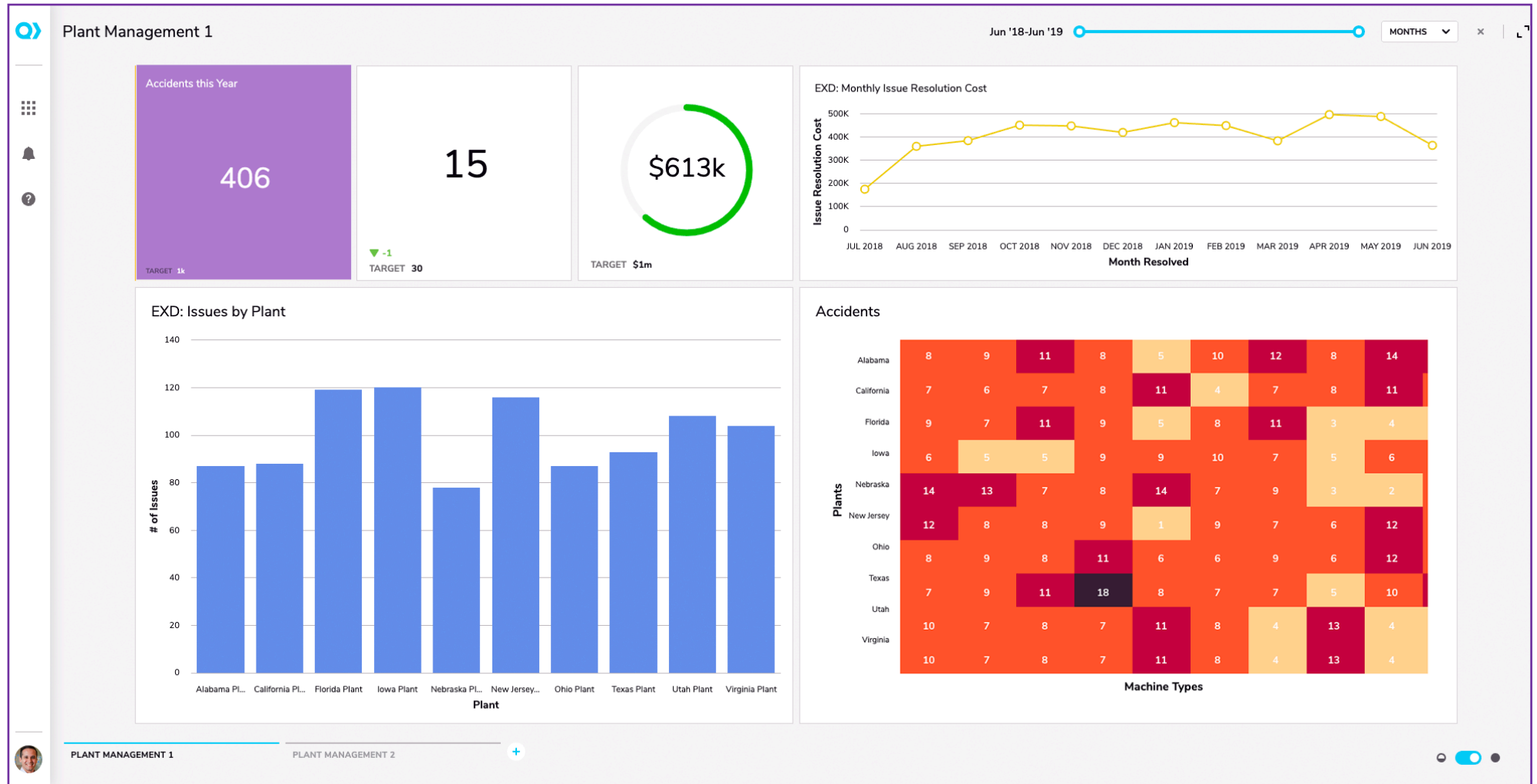


Ooh!



station 04

Executive dashboards



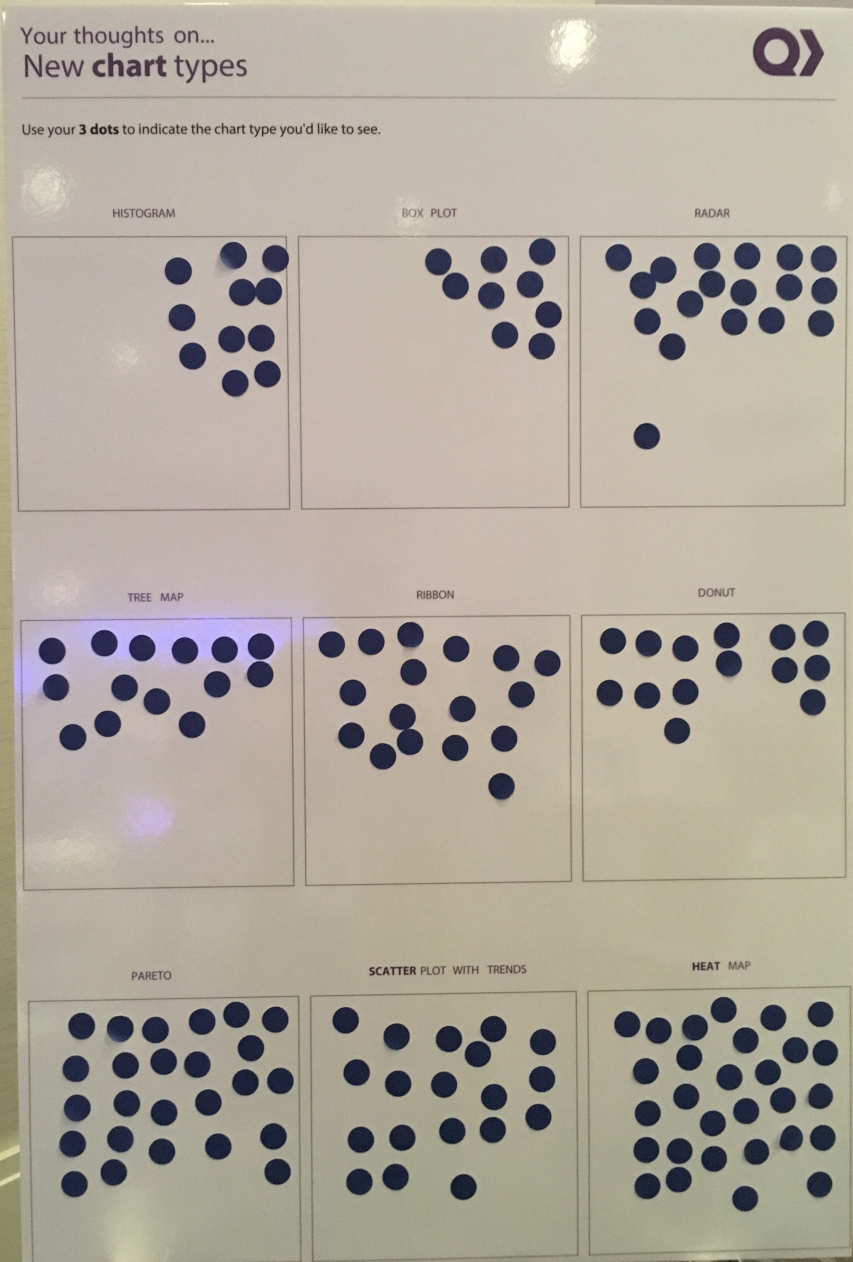


Chart	Design Lab + Kiosk Total
Heat Map (Geographically based)	58
Pareto	45
Scatter with trends	43
Tree map	32
Ribbon	29
Radar	28
Donut	16
Box Plot	15
Histogram	11
Double Gauge	2
Trailing MMT chart	2

Your thoughts on... Executive Dashboards



GOAL

Surface key data points, from across apps, onto a single, visual dashboard.

DARK MODE



BENEFIT

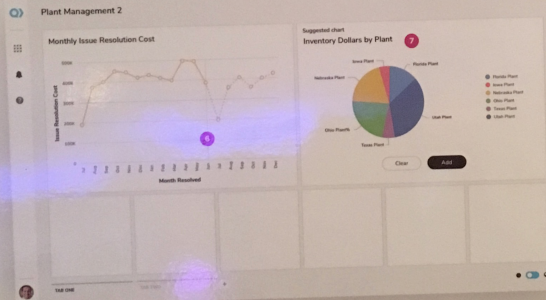
Modern, Executive - appropriate visuals
Analytics Data manipulation

What do you think? Are there additional features you'd like to see?

- 1 Across multiple apps
- 2 Filter multiple reports
- 3 New KPI charts
- 4 Dashboard management
- 5 Drill-down in place



- 6 Forecasting performance
- 7 Suggested report
- 8 Themed



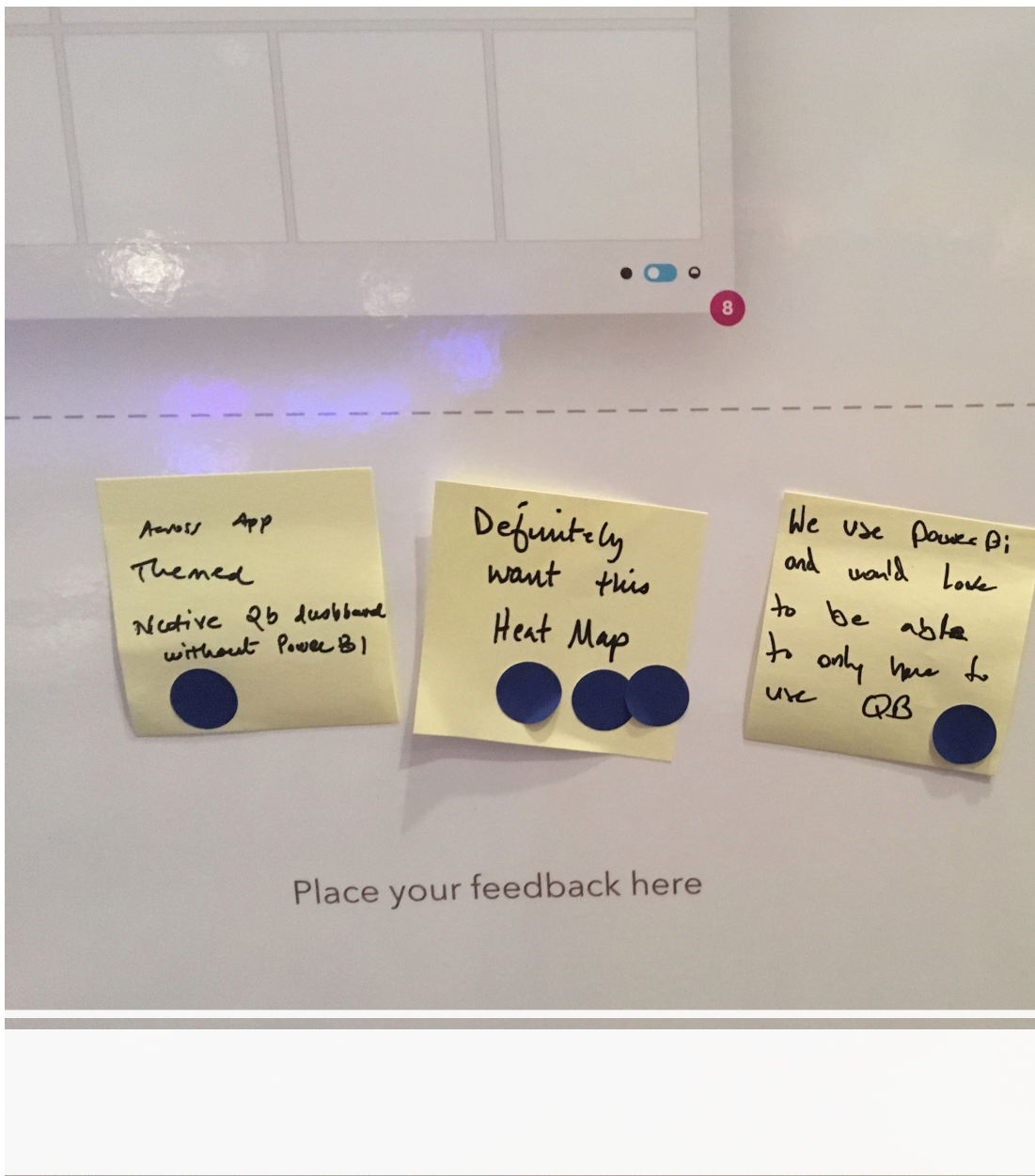
Place your feedback here

What people loved

- Cross report filter
- View across multiple apps
- Customizable - less white space
- Multiple tabs & dashboards
- KPIs
- In place drill-down
- Dark mode; visuals in general

What they asked for

- Integrate data coming from other services
- Graph together data from 2+ tables/apps in a new report on the dashboard
- Unlimited drill-downs
- Google maps - overlays of data on top of points on the map



Interesting things we learned



- Most people are happy without scrolling – tabs are fine
- Auto-refresh is a big deal on dashboards – don't want stale data
- Search would be a powerful feature to add
- Having 2 layers of organization gives them flexibility
- Many organizations really want geographic maps & filtering
- Most people wanted to sign up for EA and join in our research

20

Design Lab
visitors

28

Kiosk & "Jon"
visitors



QUICK BASE

**Design
Lab**