

help.quickbase.com redesign

How the Content & Visual Design (CVD) team is improving the guidance experience

Project overview

OBJECTIVE

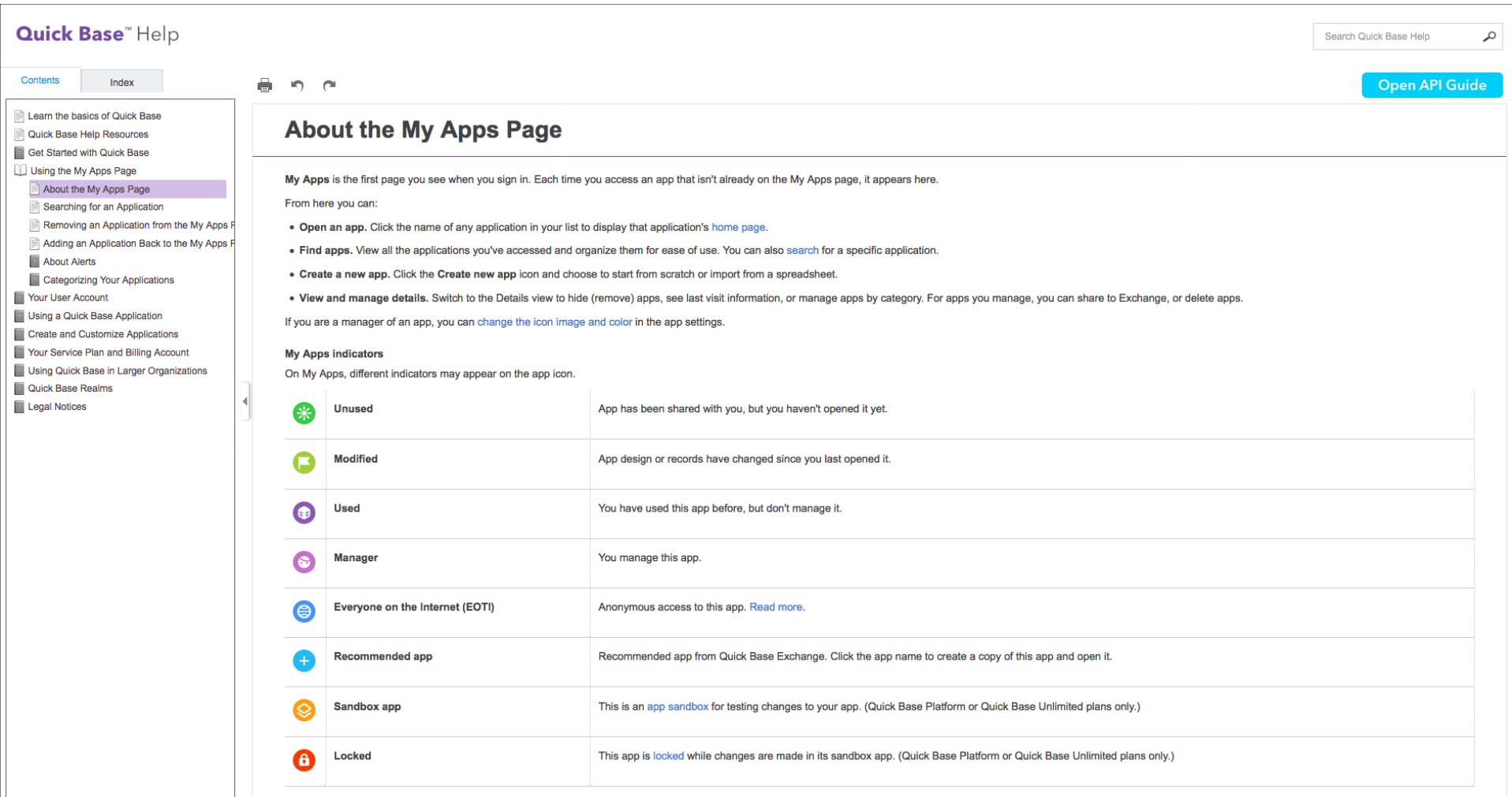
Dramatically improve the user experience for builders, admins, and end users through harmonious, internally-consistent design

KEY RESULTS

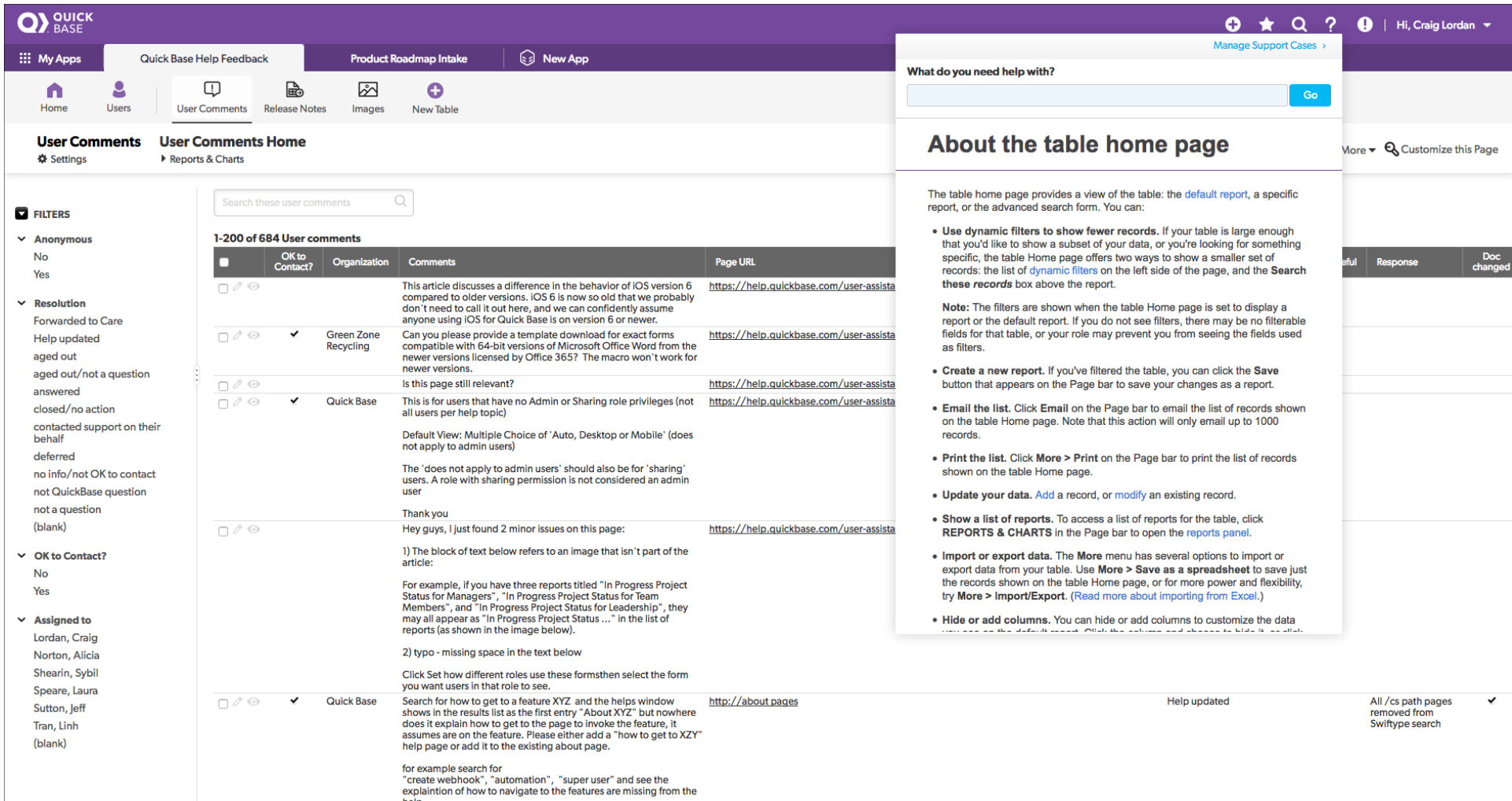
- Redesign Quick Base Help and Quick Base API Guide
- New home for monthly release notes at help.quickbase.com/release-notes
- New responsive experience for all help
- Add portal/persona home pages to create single site for external help content

Current help

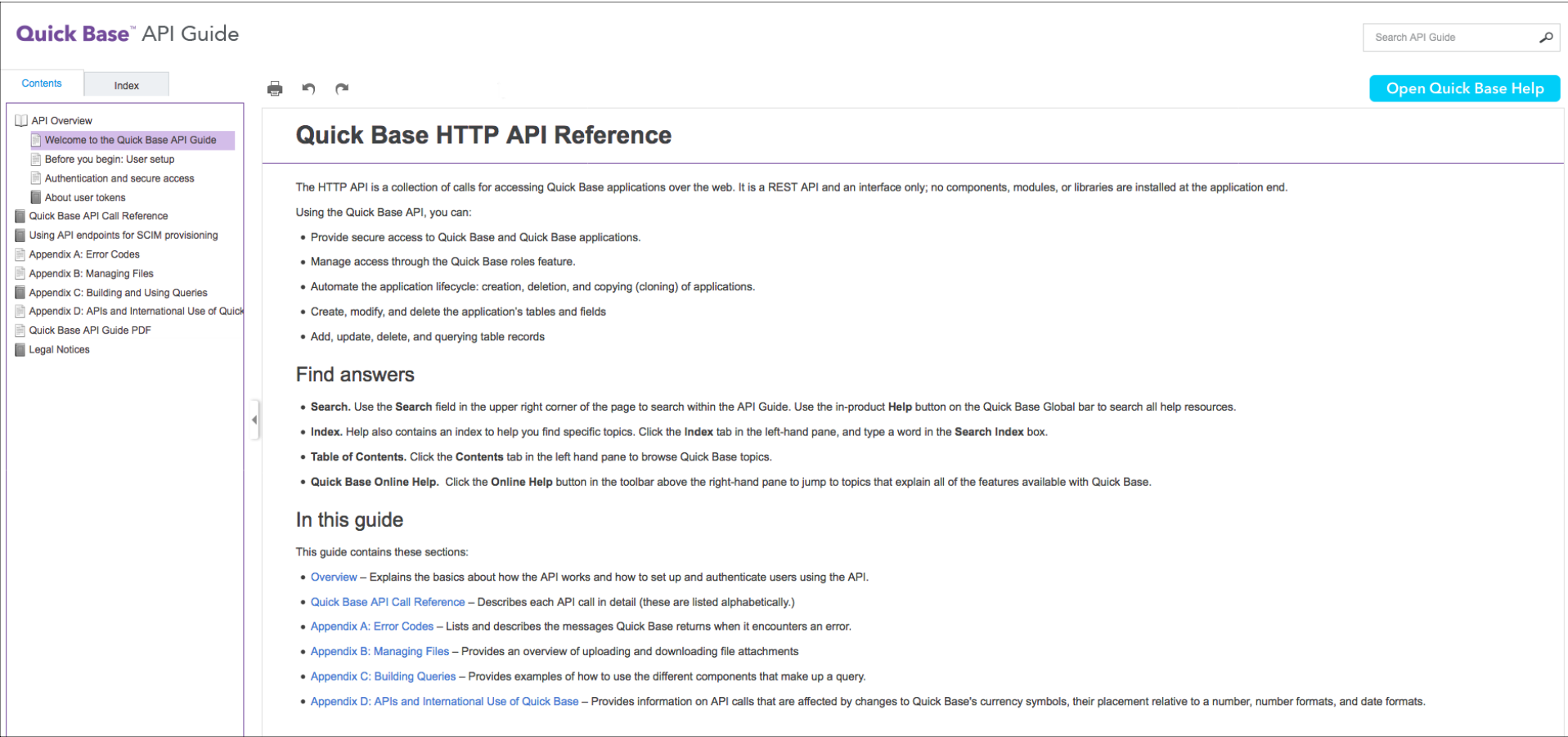
USER GUIDE at help.quickbase.com/user-assistance



CONTEXT-SENSITIVE HELP inside Quick Base



API GUIDE at help.quickbase.com/api-guide



RECENT IMPROVEMENTS

- **GitHub repo:** All content now managed in QuickBase/QuickBaseHelp repository
- **On-demand publishing:** help.quickbase.com moved to AWS S3 instance (Publishing previously tied to monthly product releases)
- **Help menu:** Clicking the ? help icon now includes context-sensitive topics

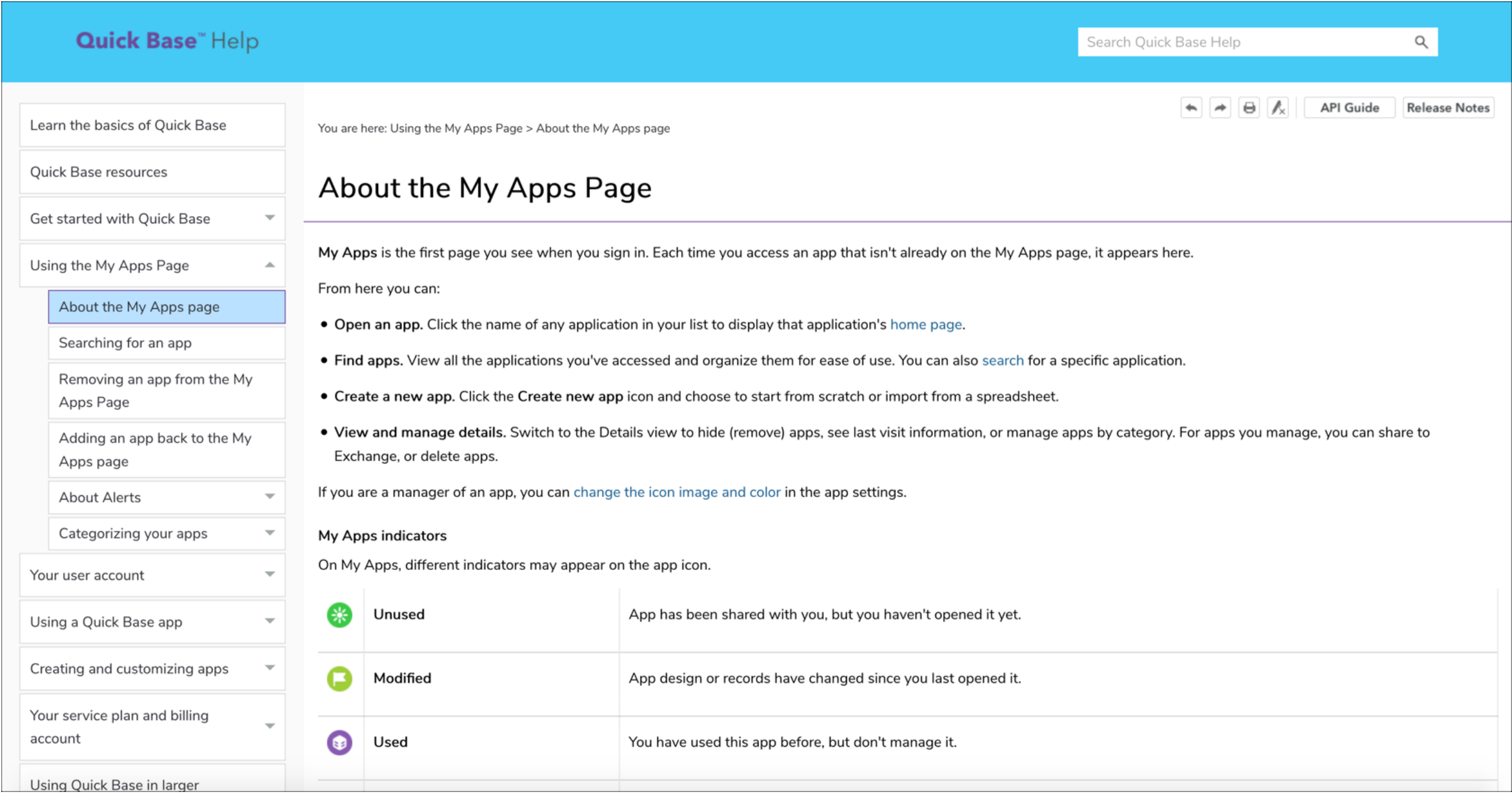
help.quickbase.com redesign

How the Content & Visual Design (CVD) team is improving the guidance experience

Visual upgrade • new release notes • Dec 2018

NEW VISUALS

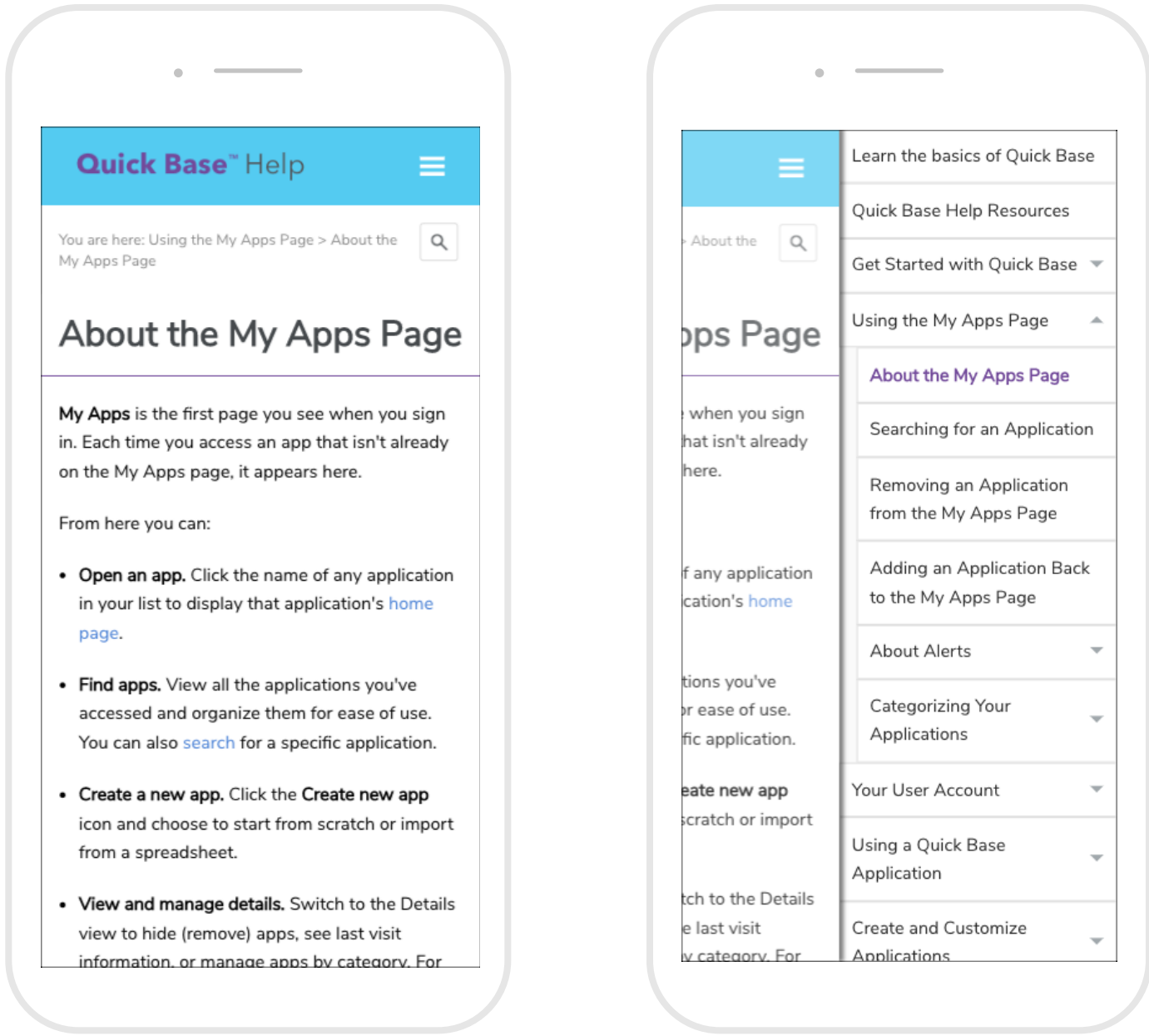
Font, layout, branding



RESPONSIVE

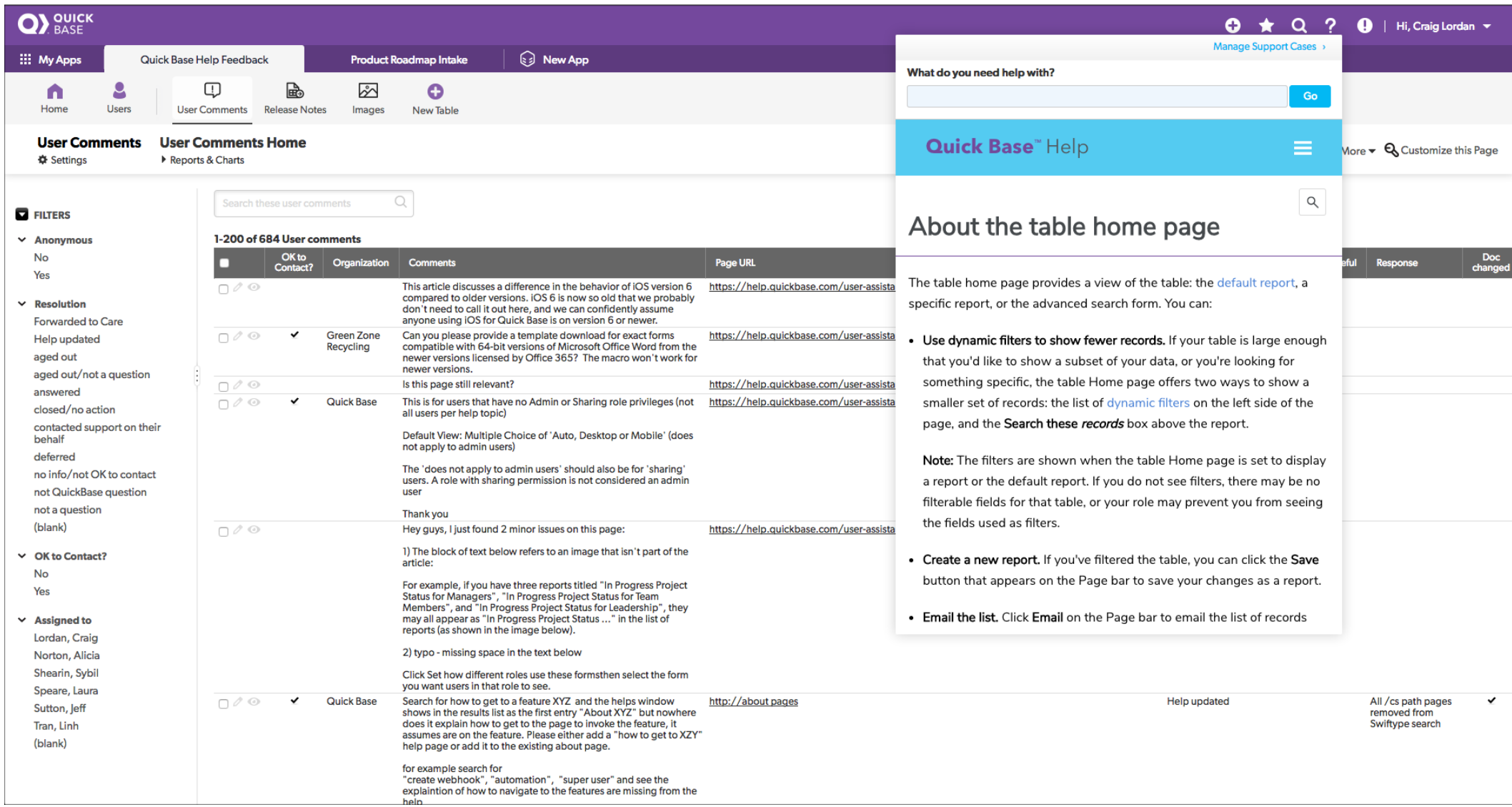
Reading topic

Navigating



CONTEXT-SENSITIVE HELP

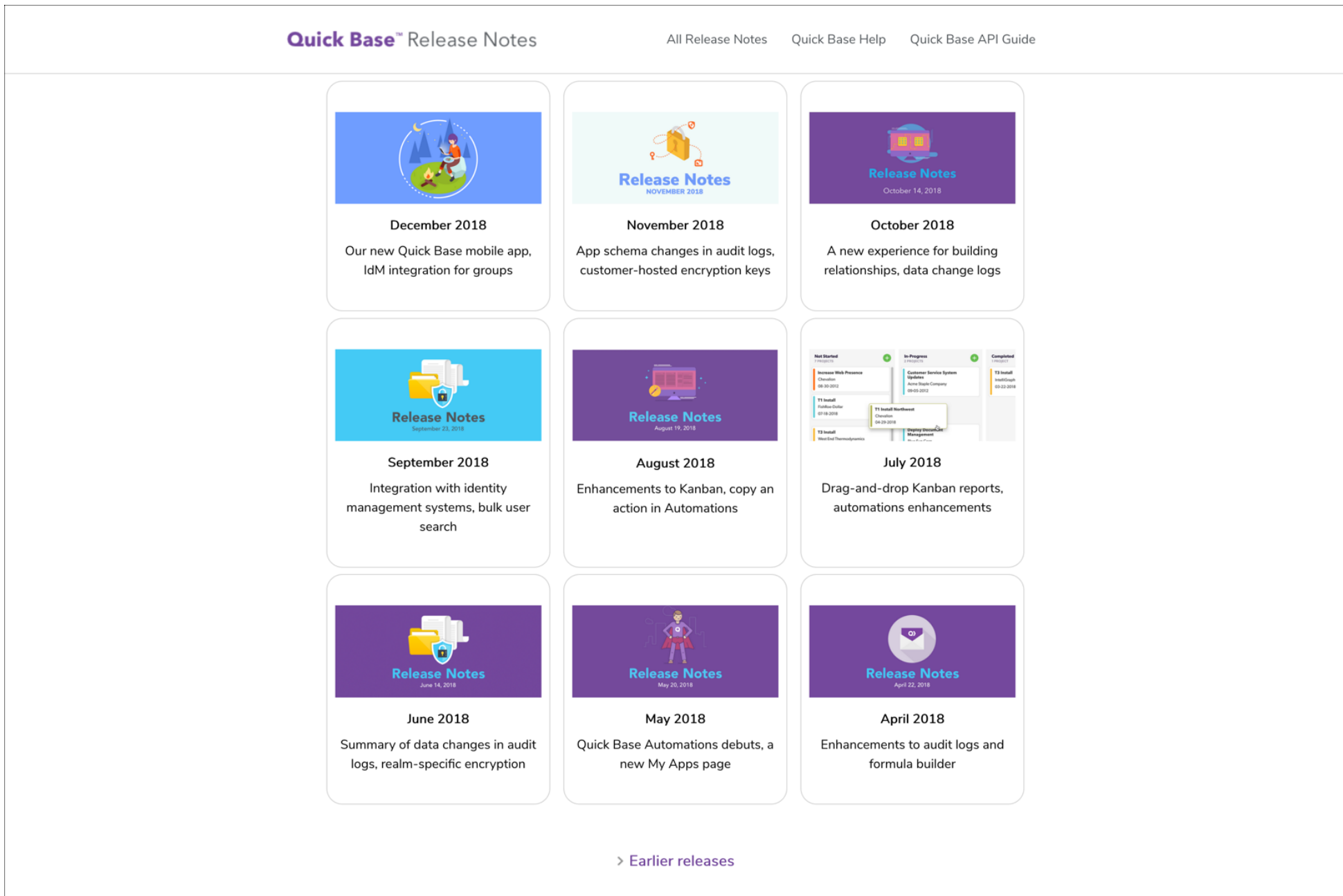
From Quick Base help menu



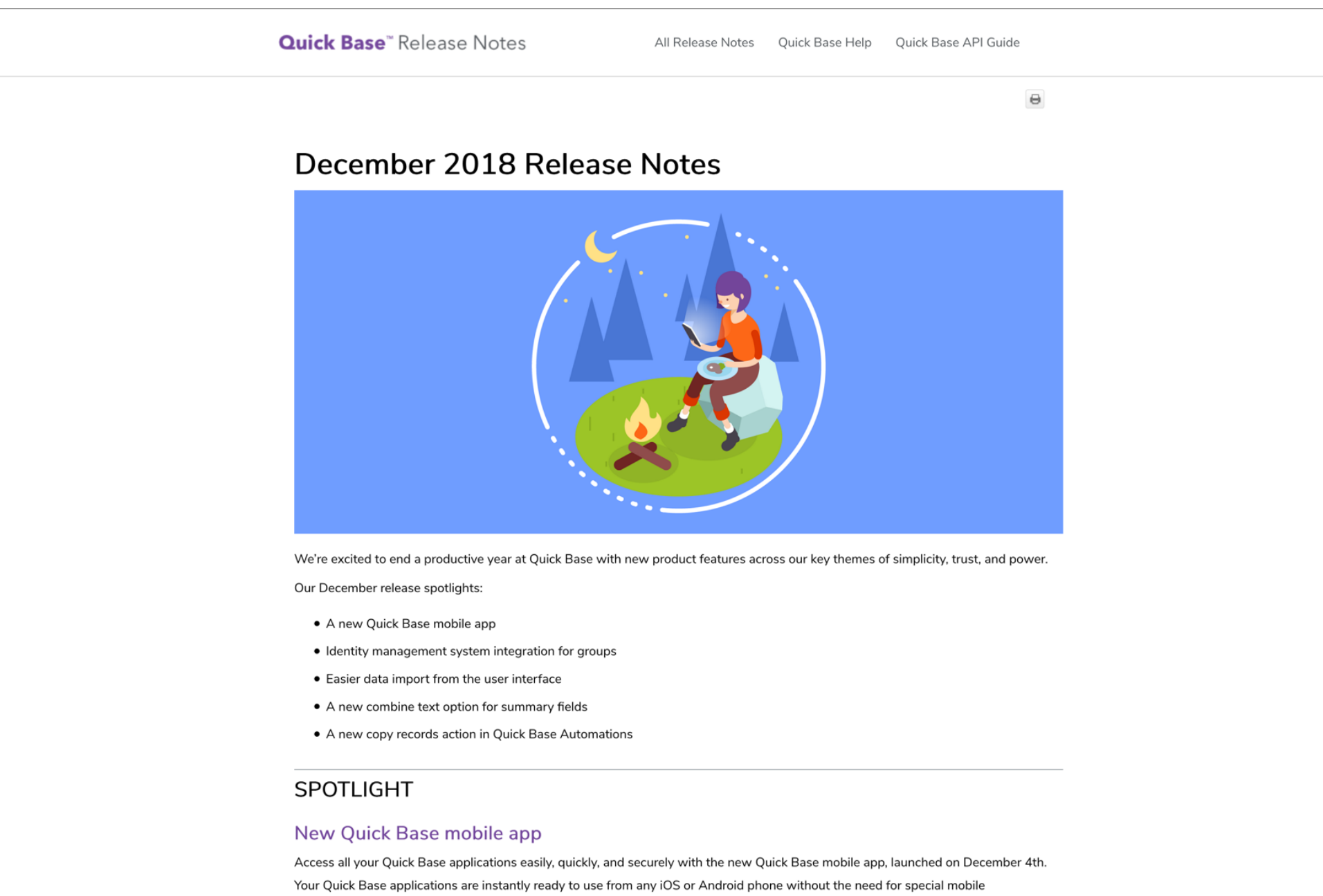
HIGHLIGHTS

- New home for release notes
- Upgrade visuals for user guide and API Guide
- Change font to match Quick Base product
- Add responsiveness for use on phones and tablets
- Use contemporary HTML5 page layout for navigation and topics

NEW RELEASE NOTES HOME



NEW RELEASE NOTES DECEMBER 2018



help.quickbase.com redesign

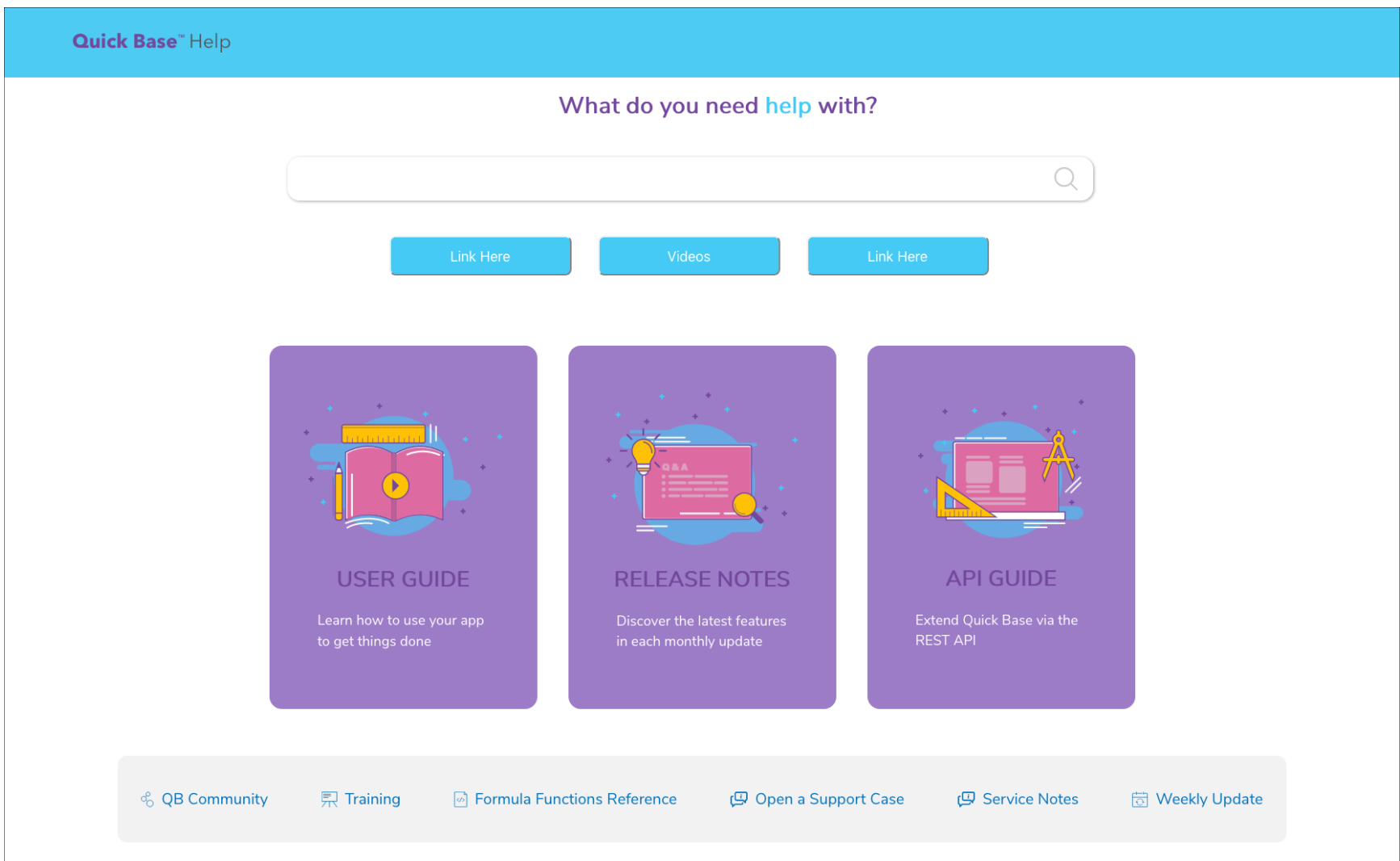
How the Content & Visual Design (CVD) team is improving the guidance experience

Redesign phase 2 • portal page • Q1 2019

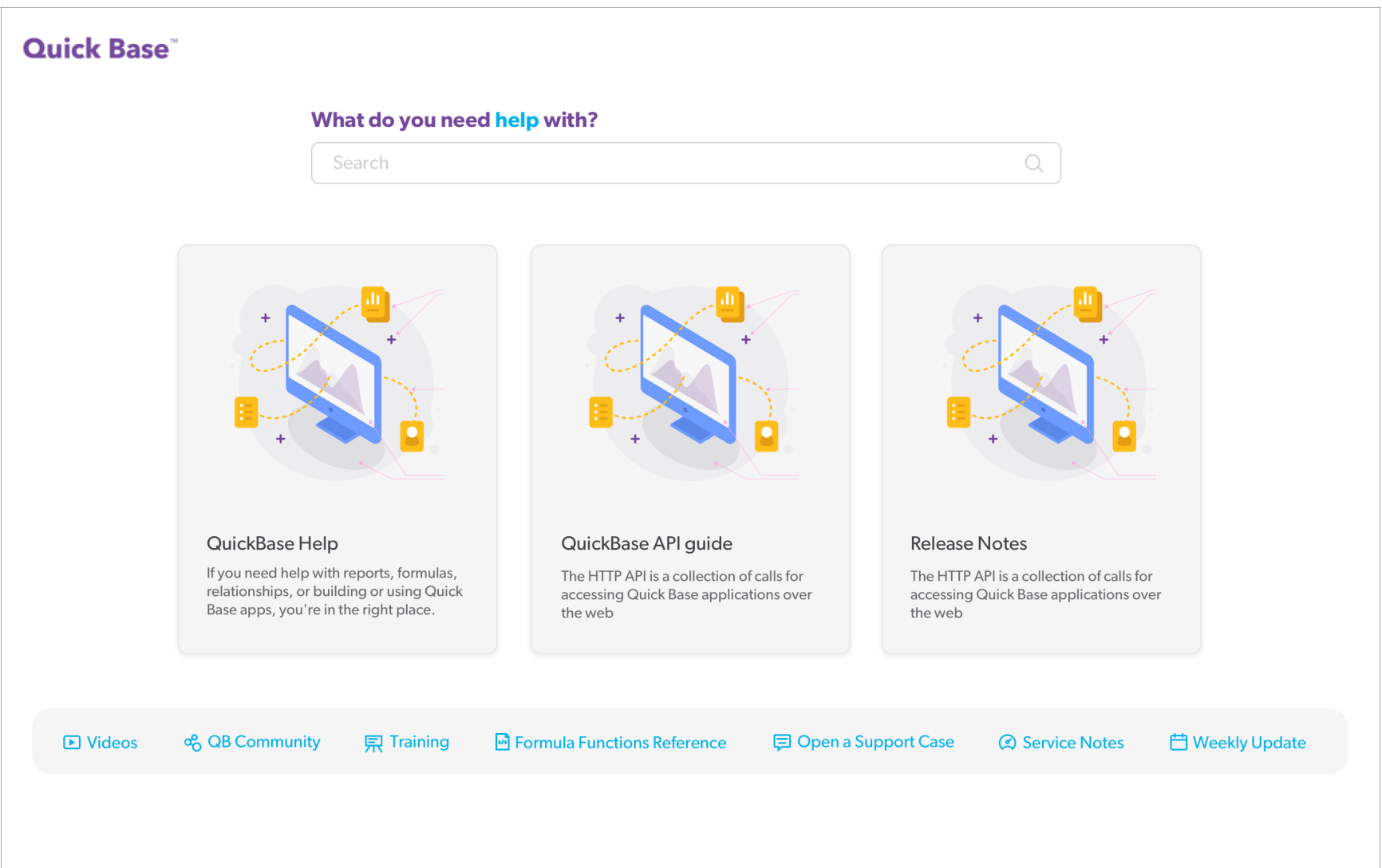
HELP PORTAL

Home page for help, release notes, and resources

Design treatment #1



Design treatment #2



HIGHLIGHTS

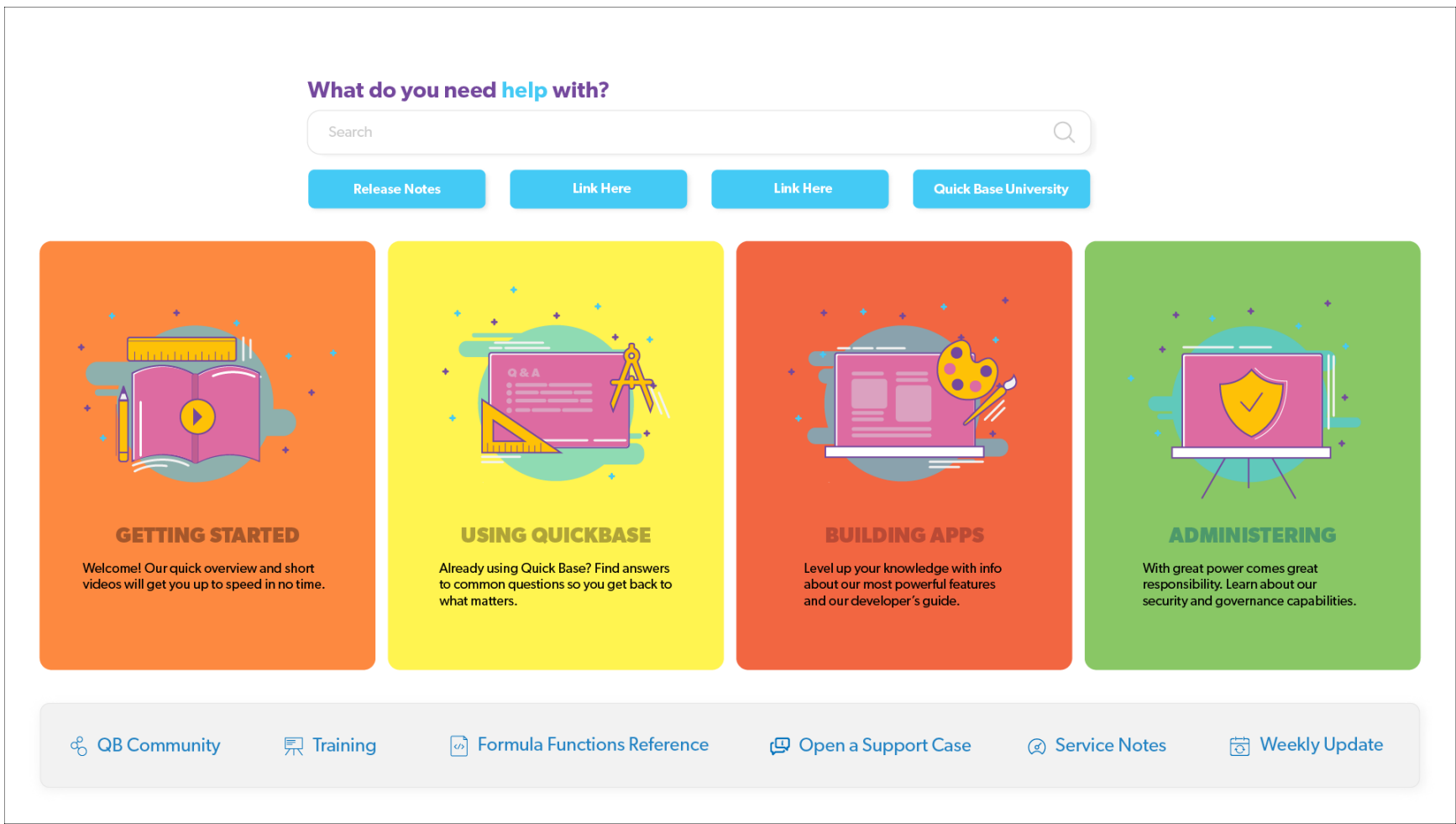
- Conduct user testing of home page and help topics
- Launch new home page for help.quickbase.com
- Add new spot for monthly release notes
- Provide easy search for help topics
- Set stage for phase 3 (persona home page)

Redesign phase 3 • persona page • Q2 2019

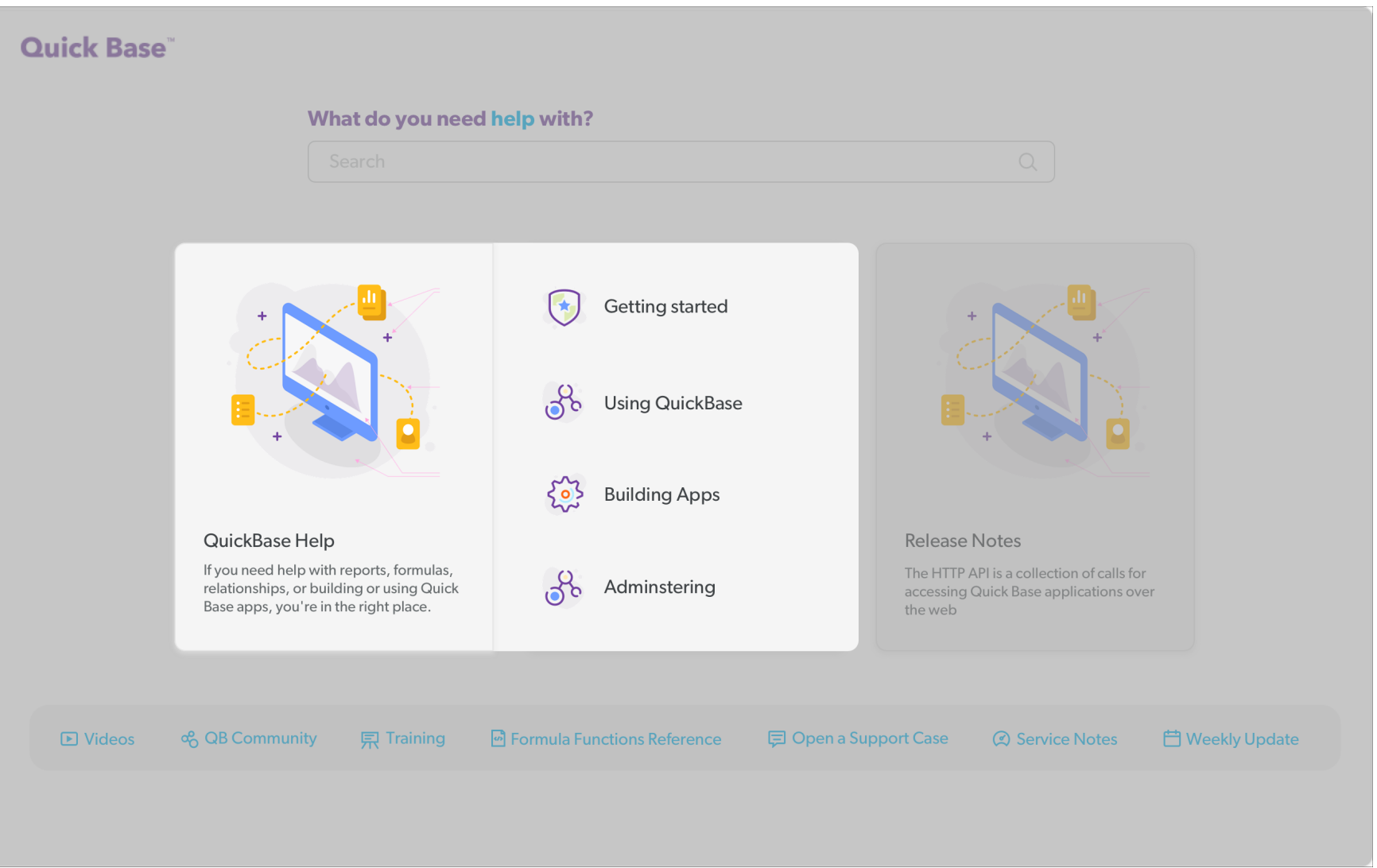
PERSONA PORTAL

Add user types to guidance

Design treatment #1

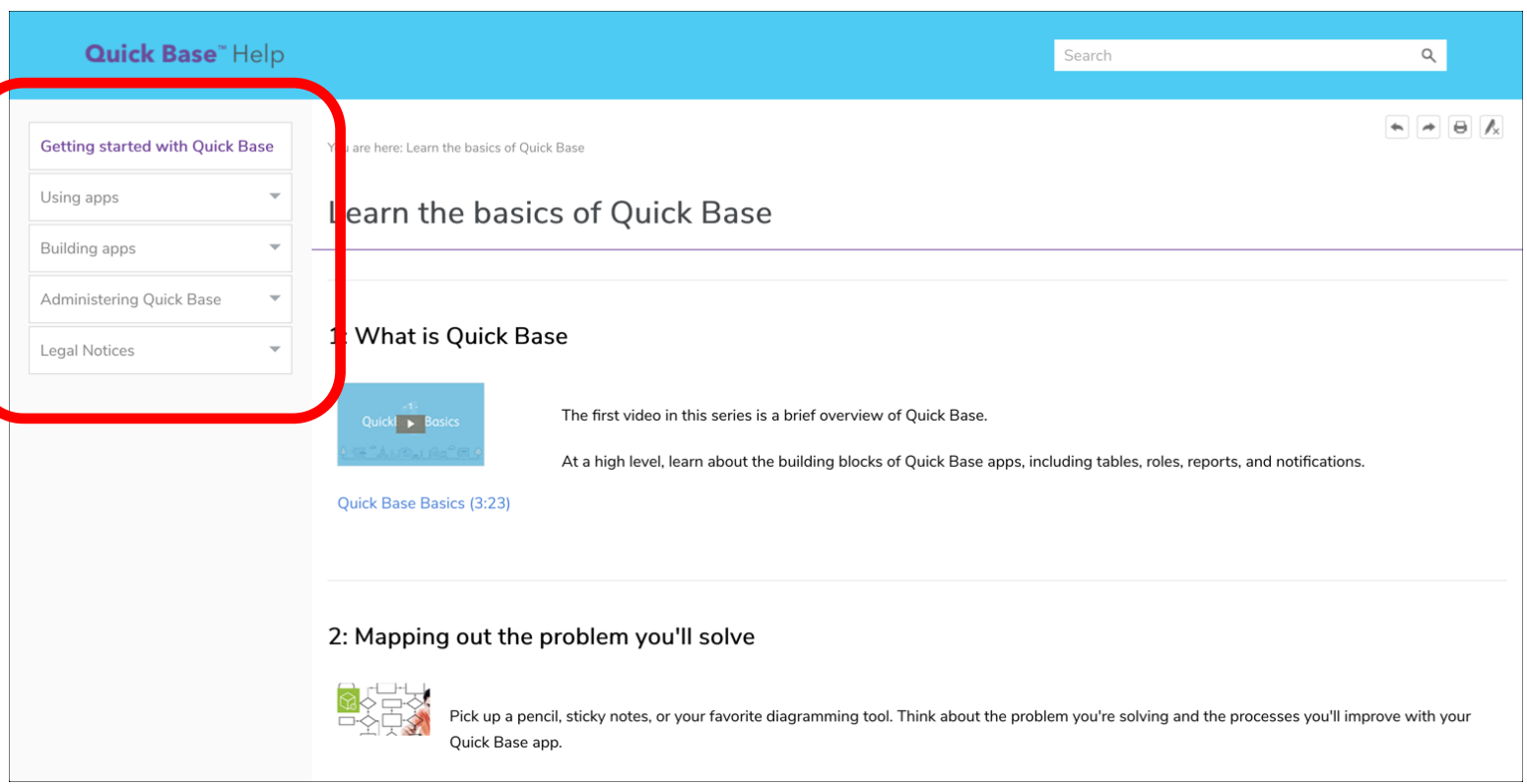


Design treatment #2



NEW INFORMATION ARCHITECTURE

Streamlined navigation



HIGHLIGHTS

- Conduct further user testing based on personas
- Introduce new persona-based paths for accessing help
- Improve information architecture and topic navigation
- Set stage for future phase focusing on topic templates