

# 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](https://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](https://help.quickbase.com/user-assistance)

This screenshot shows the 'About the My Apps Page' section of the User Guide. It includes a table with columns for status indicators (Unused, Modified, Used, Manager, Everyone on the Internet (EDIT), Recommended app, Sandbox app, Locked) and descriptions. A note at the top states: 'My Apps is the first page you see when you sign in. Each time you access an app that isn't already on the My Apps page, it appears here.'

#### CONTEXT-SENSITIVE HELP inside Quick Base

This screenshot shows the 'About the table home page' context-sensitive help documentation. It provides instructions on how to use dynamic filters, print reports, and update data. It also includes a note about the table Home page being used to display a report or a default report if no filters are applied.

#### API GUIDE at [help.quickbase.com/api-guide](https://help.quickbase.com/api-guide)

This screenshot shows the 'Quick Base HTTP API Reference' section of the API Guide. It includes a table of contents for the API Overview, API Call Reference, Error Codes, Managing Files, Building Queries, and International Use of Quick Base. A note at the top states: 'The HTTP API is a collection of calls for accessing Quick Base applications over the web. It is a REST API and an interface only; no components, modules, or libraries are installed at the application end.'

#### 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

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Visual upgrade • new release notes • Dec 2018

## NEW VISUALS

Font, layout, branding

This screenshot shows the 'About the My Apps Page' article from the Quick Base Help site. The page features a light blue header with the 'Quick Base™ Help' logo and a search bar. A sidebar on the left contains links like 'Learn the basics of Quick Base', 'Quick Base resources', and 'Using the My Apps Page'. The main content area includes a table explaining different app indicator icons: 'Unused' (green star), 'Modified' (yellow square), and 'Used' (purple circle).

## RESPONSIVE

Reading topic

A mobile phone displaying the same 'About the My Apps Page' article as the desktop version, but with a more compact layout suitable for a smaller screen.

Navigating

A mobile phone displaying the navigation sidebar from the desktop version, which is now a vertical list of links on a mobile device.

## CONTEXT-SENSITIVE HELP

From Quick Base help menu

This screenshot shows a 'User Comments Home' page with a modal window open. The modal is titled 'About the table home page' and provides detailed instructions on how to use dynamic filters to show fewer records. It also includes a note about filters being shown when the table Home page is set to display a specific report or advanced search.

## 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

This screenshot shows the 'Release Notes' home page. It features a grid of cards, each representing a different release. The cards include titles like 'December 2018', 'November 2018', and 'October 2018', along with brief descriptions of the changes made in each release.

## NEW RELEASE NOTES DECEMBER 2018

This screenshot shows the 'December 2018 Release Notes' page. It features a large circular illustration of a person sitting by a campfire at night. Below the illustration, there's a summary of the December release and a list of key features.

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## Redesign phase 2 • portal page • Q1 2019

HELP PORTAL  
Home page for help, release notes, and resources

Design treatment #1

Design treatment #2

What do you need help with?

User Guide, Release Notes, API Guide

QuickBase Help, QuickBase API guide, Release Notes

QB Community, Training, Formula Functions Reference, Open a Support Case, Service Notes, Weekly Update

QB Community, Training, Formula Functions Reference, Open a Support Case, Service Notes, Weekly Update

### 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

What do you need help with?

Release Notes, Link Here, Quick Base University

Getting started, Using QuickBase, Building Apps, Administering

QuickBase Help, Release Notes

QB Community, Training, Formula Functions Reference, Open a Support Case, Service Notes, Weekly Update

QB Community, Training, Formula Functions Reference, Open a Support Case, Service Notes, Weekly Update

### NEW INFORMATION ARCHITECTURE Streamlined navigation

Quick Base Help

Getting started with Quick Base

Using apps

Building apps

Administering Quick Base

Legal Notices

Learn the basics of Quick Base

What is Quick Base

Mapping out the problem you'll solve

Quick Base Basics (3:23)

Pick up a pencil, sticky notes, or your favorite diagramming tool. Think about the problem you're solving and the processes you'll improve with your Quick Base app.

### 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