

**QUICK BASE**

# Design Lab

# Overview

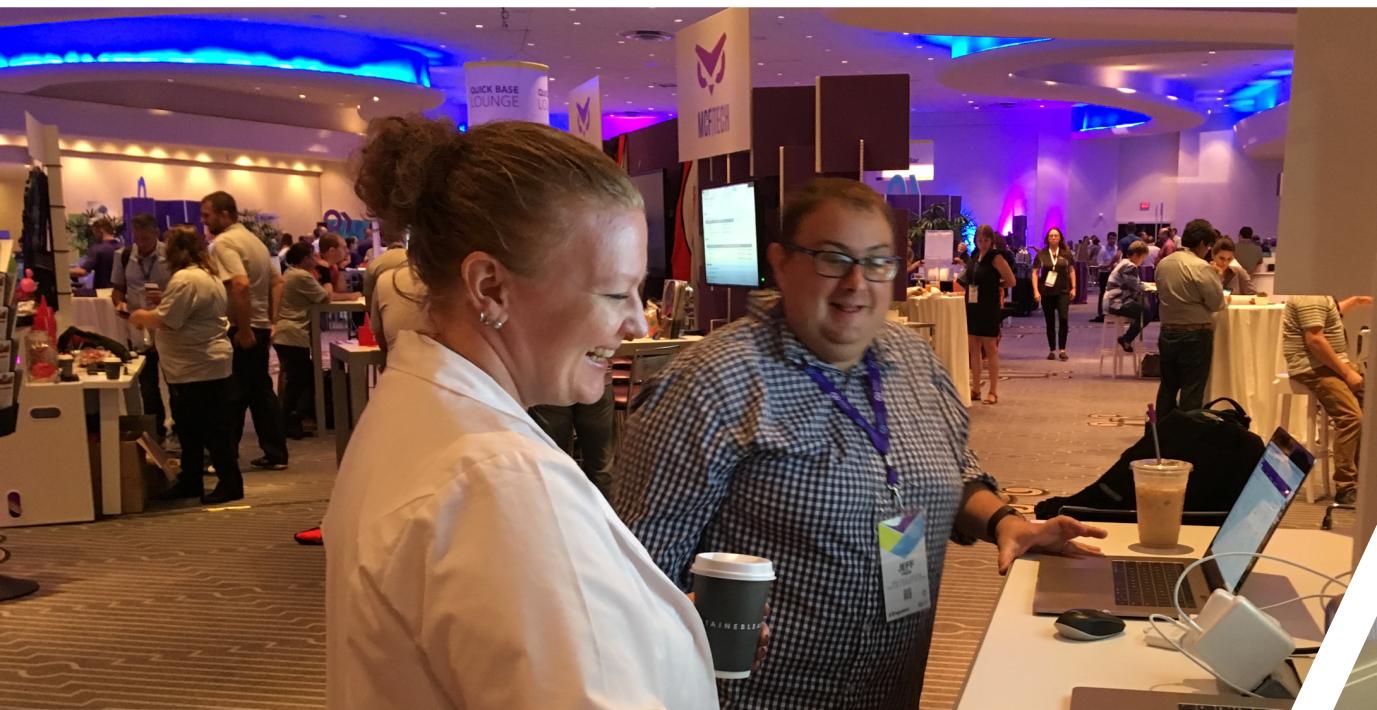
- Part of Empower Exhibit Hall
- 4 stations
  - 01 Visual Builder
  - 02 Getting Help
  - 03 New Grid for Reports
  - 04 Executive Dashboards
- Wishing Wall

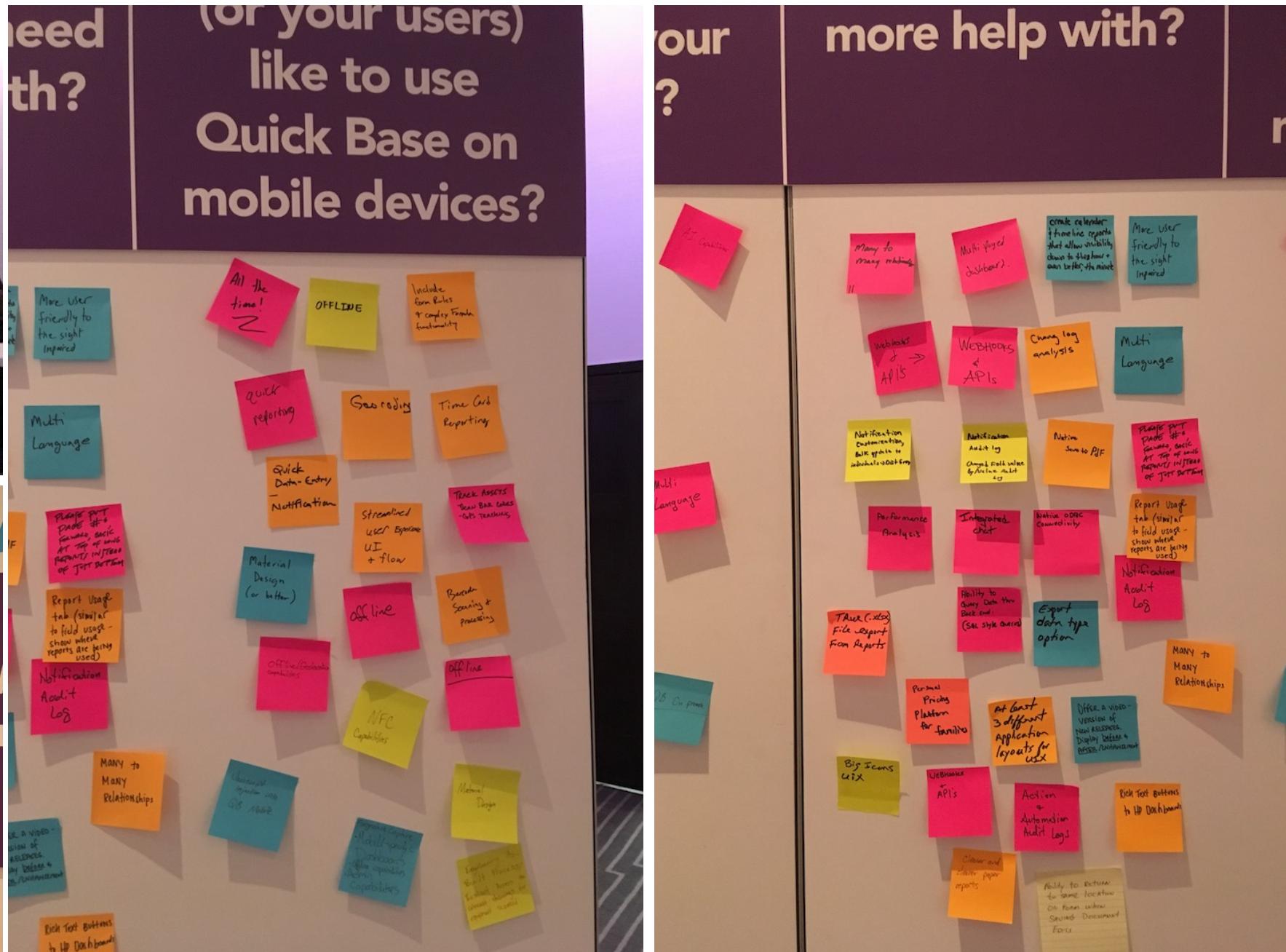
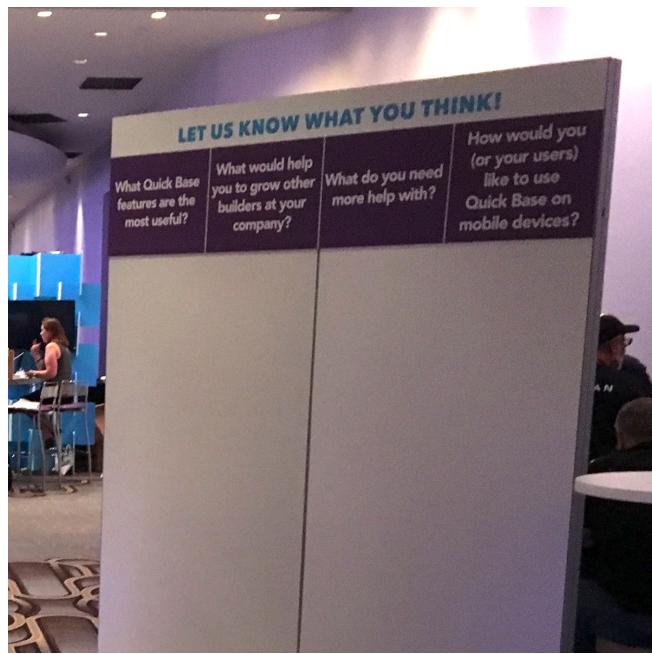
**52**  
total visitors

**1**  
stolen  
flamingo

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







# Design lab app

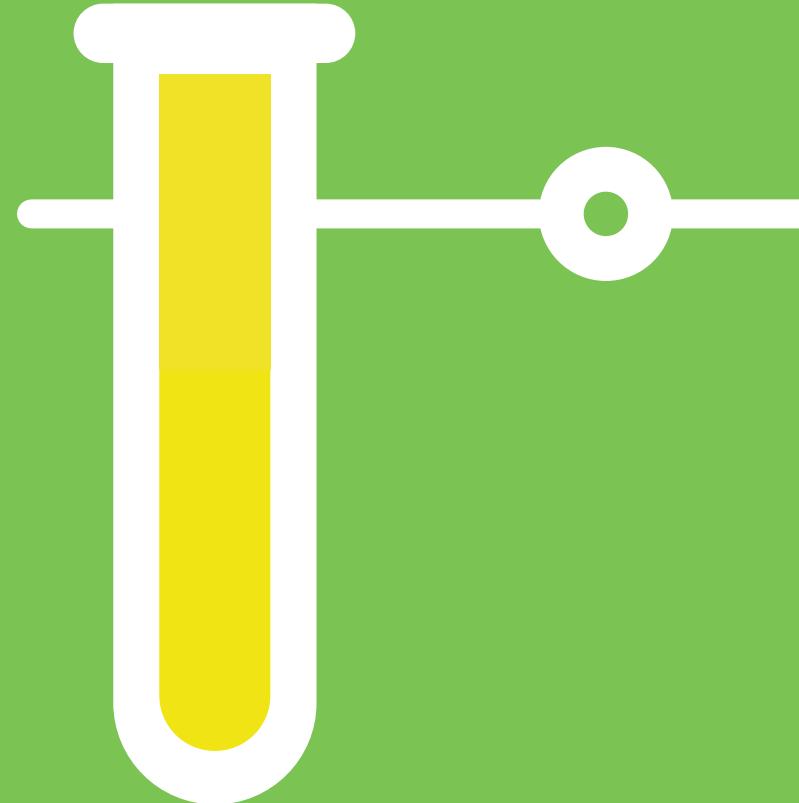
The screenshot shows a Quickbase application interface. On the left, a large circular overlay contains the text "Design lab app". The main interface has two main sections:

- Empower Registrants (List All):** This section shows a table of 36 Empower registrants. The columns are: Name, Company Name, Email Address, Job Title, Pool?, and EA?. The table includes rows for Adrian Pestana, Alyssa Zmolik, Angie Bennett, Bryan Carabeo, Dennis Nguyen, Dylan Pike, Edward Zhang, Edwin Smith, and Eric Evans, all associated with Southwest Airlines.
- Visual Builder (Add Visual Builder):** This section is for creating prototypes. It includes fields for Customer name (set to adrian.pestana@wnco.com), Company (Southwest Airlines), and Which task? (Lookup or summary) (set to Lookup task). A yellow box provides instructions for starting the task, mentioning a brief overview of Visual Builder, opening the VB, and showing printouts of the fake app. A pink box lists links to team manager, lookup/summary prototype, and help tips prototypes.

- 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



Poof!



QUICK BASE  
**Design  
Lab**

station 01

# Visual Builder

QUICK BASE

All changes saved

Project Tracker

Project Tracker

Projects 18 fields

Team members 6 fields

Tasks 17 fields

Documents 15 fields

App Properties:

Name: Project Tracker

Description: We're building projects at our organization

App icon & color:

#a3d36f

Go to app properties All changes saved

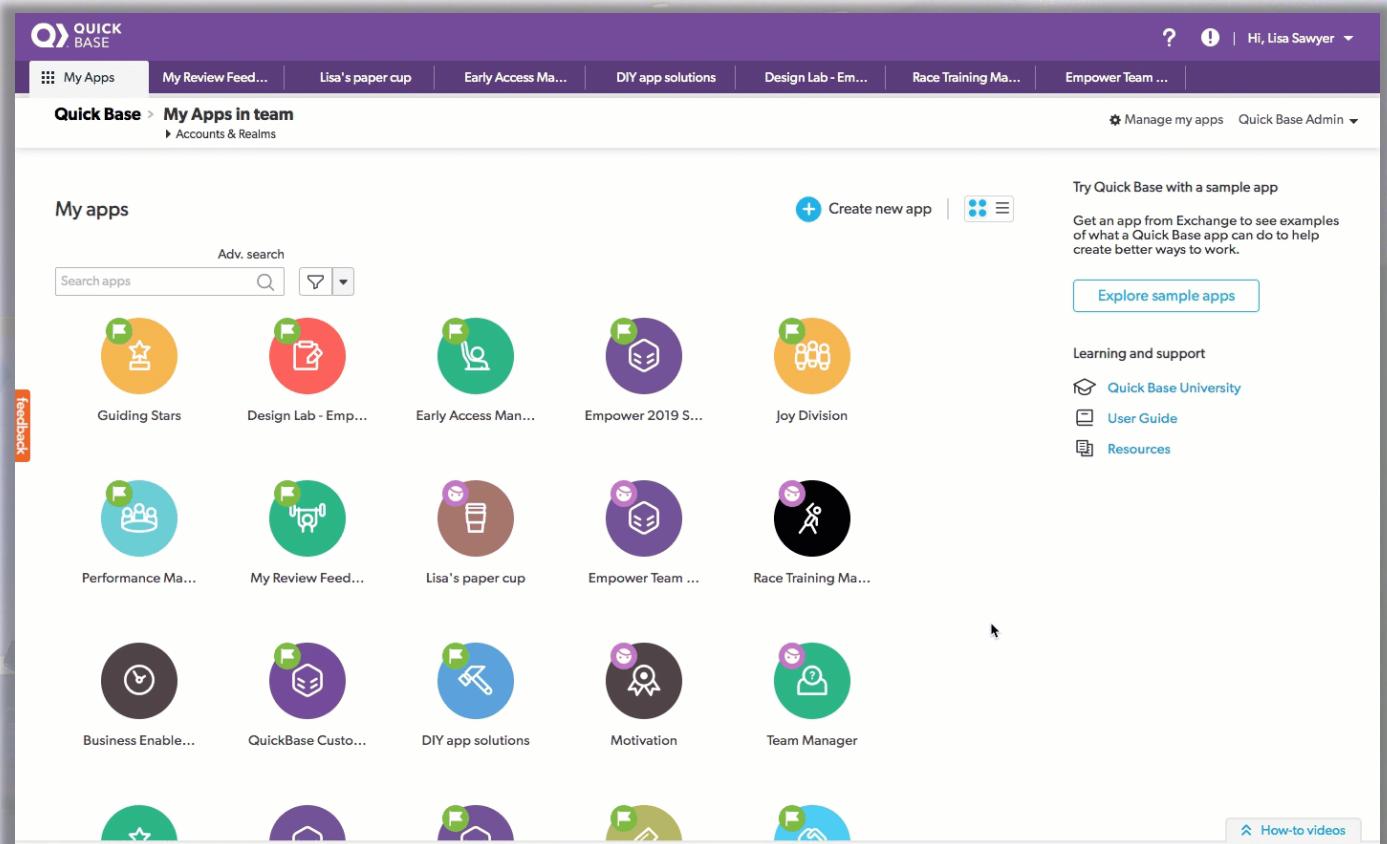
The screenshot shows the Quick Base Visual Builder interface. At the top, there's a purple header bar with the Quick Base logo, a search icon, a help icon, and a greeting 'Hi, Carolyn Griffel'. Below the header is a navigation bar with 'My Apps' and 'Project Tracker' tabs. The main area is titled 'Project Tracker' and contains four entities: 'Projects' (18 fields), 'Team members' (6 fields), 'Tasks' (17 fields), and 'Documents' (15 fields). Arrows indicate relationships between these entities. To the left, a sidebar lists various field types: Text, Text Area, Rich Text, Multiple Choice, Multi-select Text, Checkbox, Numeric, Numeric Currency, Numeric Percent, Numeric Rating, and Date. On the right, there's a panel for 'App Properties' where the name is set to 'Project Tracker' and the description is 'We're building projects at our organization'. It also includes a section for 'App icon & color' with a green grid icon and a color palette, and a hex code '#a3d36f'.

# 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?”

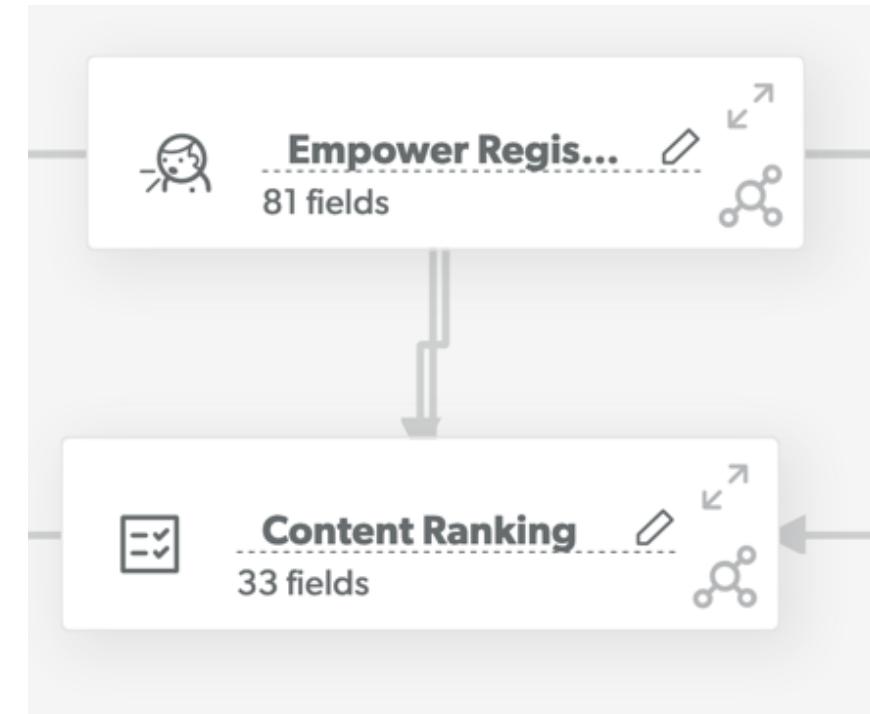
*(Referring to the relationship icon in the bottom of each table card)*

“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 than 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:

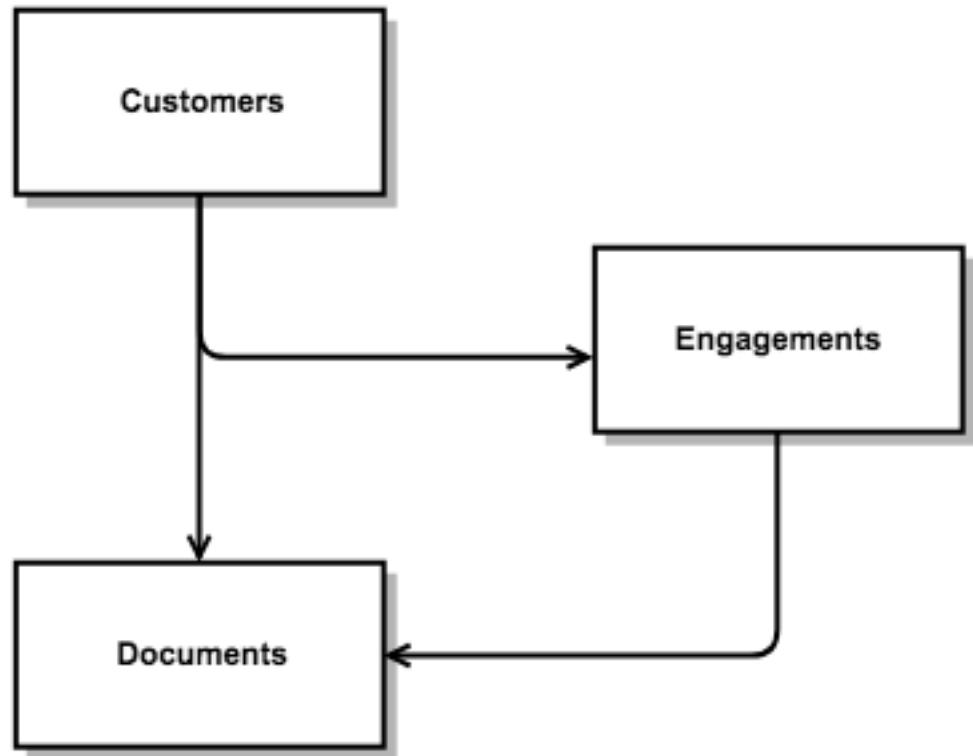
The BAT team chose to test the SIMPLEST of interactions. These interactions were the ones that very new builders naturally did in early testing.

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

The screenshot shows the Quick Base Team Manager interface with three tables:

- Customers**: 22 fields. This table is connected to both **Engagements** and **Documents**.
- Engagements**: 6 fields. This table is connected to **Documents**.
- Documents**: 8 fields. This table is connected to **Engagements**.

**Table Properties:**

- Name:** Customers
- Description:** Our company customers with contact info and other info
- Icon:**
- Delete table:**

**Left sidebar (My Apps):**

- Table**: Selected
- TEXT**: Text, Text Area, Rich Text, Multiple Choice, Multi-select Text, Checkbox
- NUMBER**: Numeric, Numeric Currency, Numeric Percent, Numeric Rating
- DATE**: Date, Date Time

# 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

The screenshot shows the Quickbase Visual Builder interface for a "Team Manager" app. The app properties are set to "Name: Team Manager" and "Description: Phase 3 testing". The interface includes a sidebar with field types: Table, Text, Text Area, Rich Text, Multiple Choice, Multi-select Text, Checkbox, Numeric, Numeric Currency, Numeric Percent, Numeric Rating, Date, Date Time, Time of day, and Duration. Three tables are connected in a hierarchy: "Customers" (22 fields), "Engagements" (6 fields), and "Documents" (8 fields). A large arrow points from "Customers" to "Documents". The "Engagements" table is positioned between them. The "Documents" table has a small icon of a document with a spark symbol.

App Properties:

Name: Team Manager

Description: Phase 3 testing

App icon & color:

#20b685

Save & go to all app settings

Customer

Engagements

Documents

Table

Text

Text Area

Rich Text

Multiple Choice

Multi-select Text

Checkbox

Numeric

Numeric Currency

Numeric Percent

Numeric Rating

Date

Date Time

Time of day

Duration

22 fields

6 fields

8 fields

Hi, Lisa Sawyer

Exit

# 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

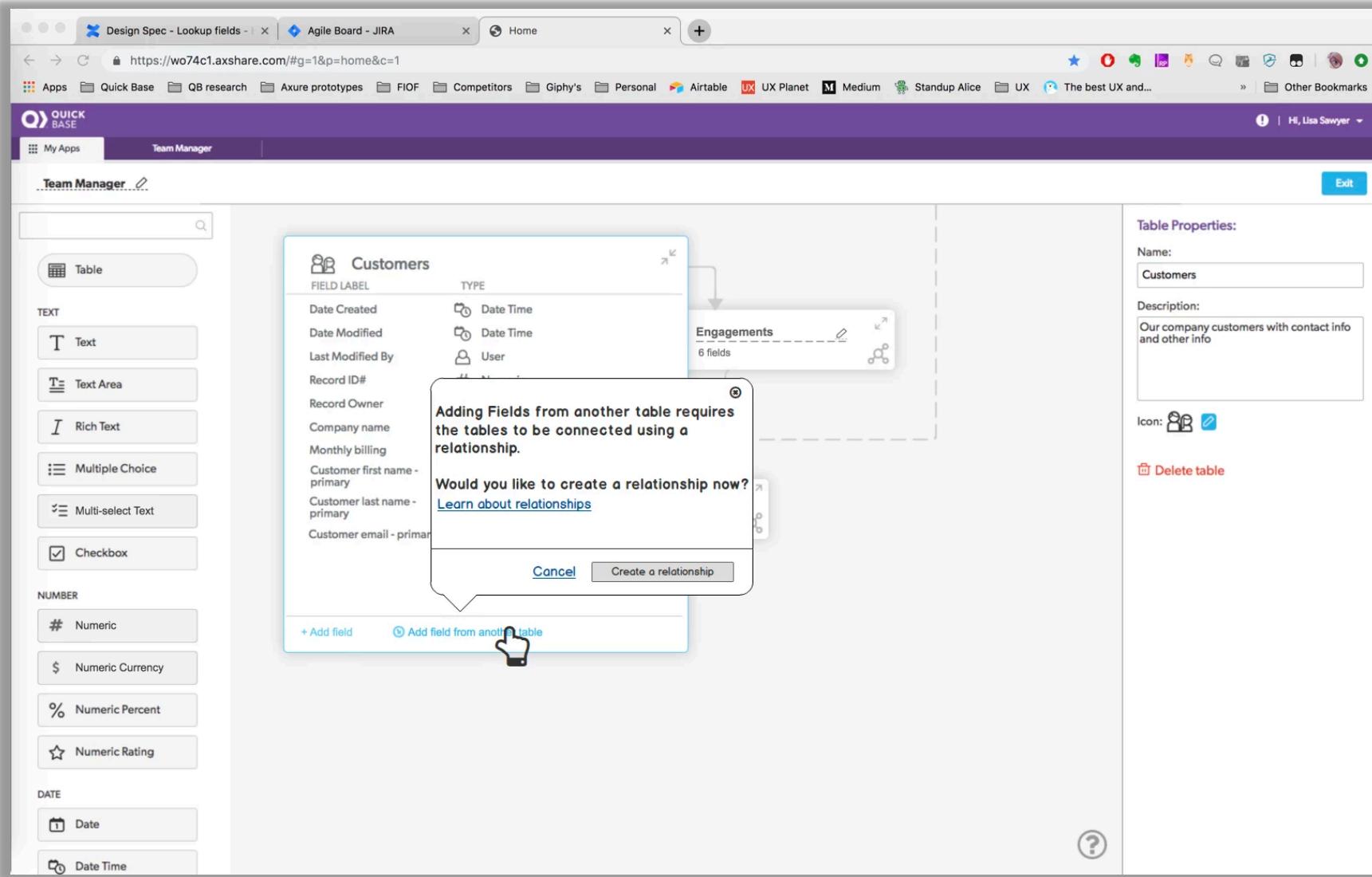
"Wait. That's it? That's so easy. I was **expecting it to be more complicated!**"

- 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 shows the Quickbase Visual Builder interface. On the left, there's a sidebar with various field types: Table, TEXT (Text, Text Area, Rich Text, Multiple Choice, Multi-select Text, Checkbox), NUMBER (# Numeric, \$ Numeric Currency, % Numeric Percent, ★ Numeric Rating), and DATE (Date). The main canvas displays three tables: 'Customers' (22 fields), 'Engagements' (6 fields), and 'Documents' (8 fields). Relationships are shown as dashed lines connecting the tables. To the right, a 'Help' panel is open with tabs for Overview, Field types, and Relationships. The Overview tab contains text about Visual Builder, testing configurations, and a note about existing apps. The Relationships tab lists current limitations and notes about connected tables.

**Help**

**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

20

total visitors

## 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

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 TECHNOLO
	Daniel Pate	Database Administrator	RCP Integrity Services, Inc
	Giuseppe Macri	Business Integration Coordinator	Community Health Center
	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.

## 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.

## 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.

## 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.**

## Relationships

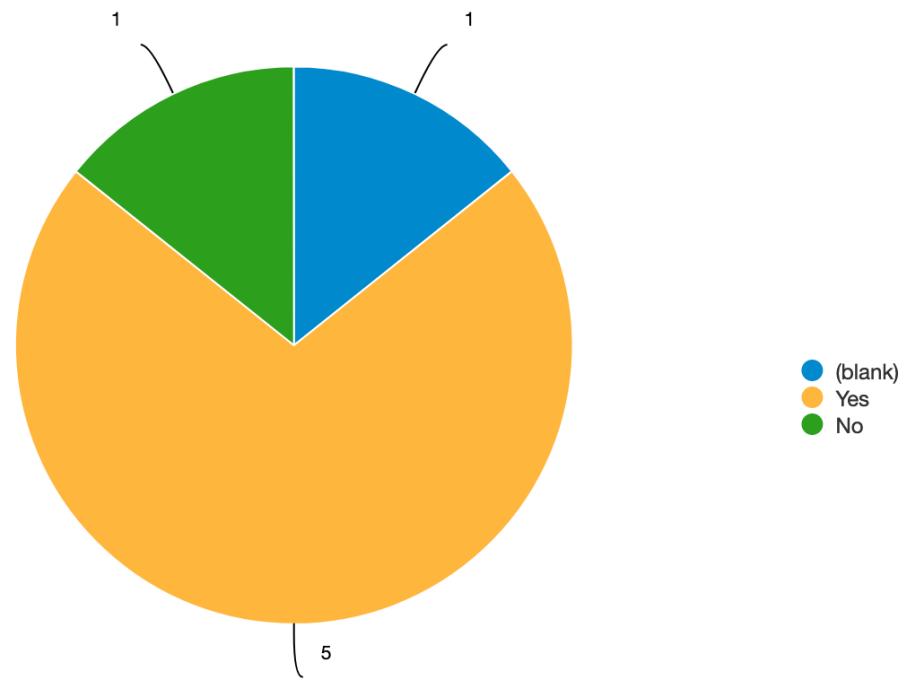
So I was trying to fix a problem that somebody else had, they had created an incorrect relationship.

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

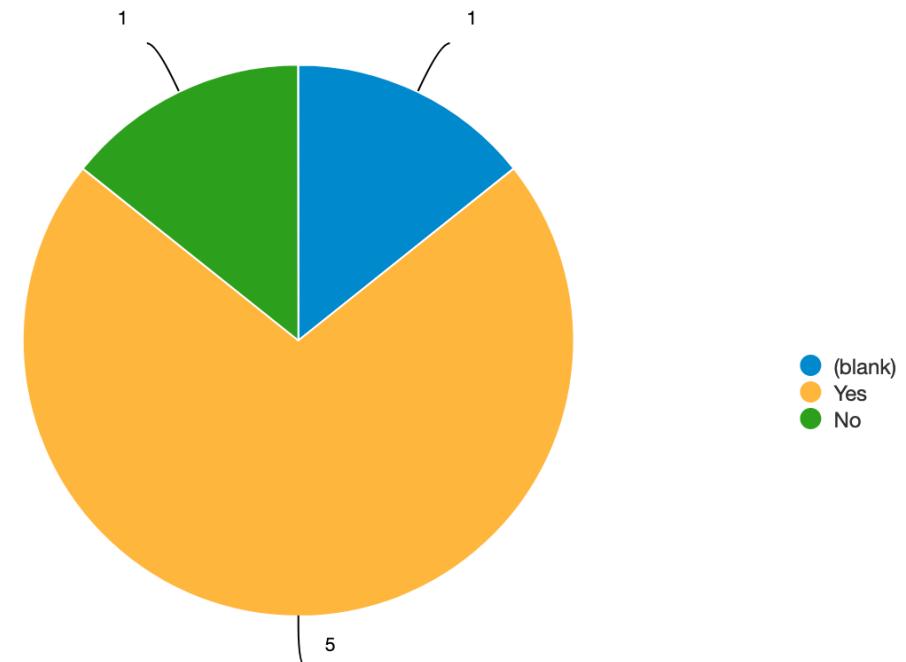
# Q3: What did you try to do to get unstuck

- 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?

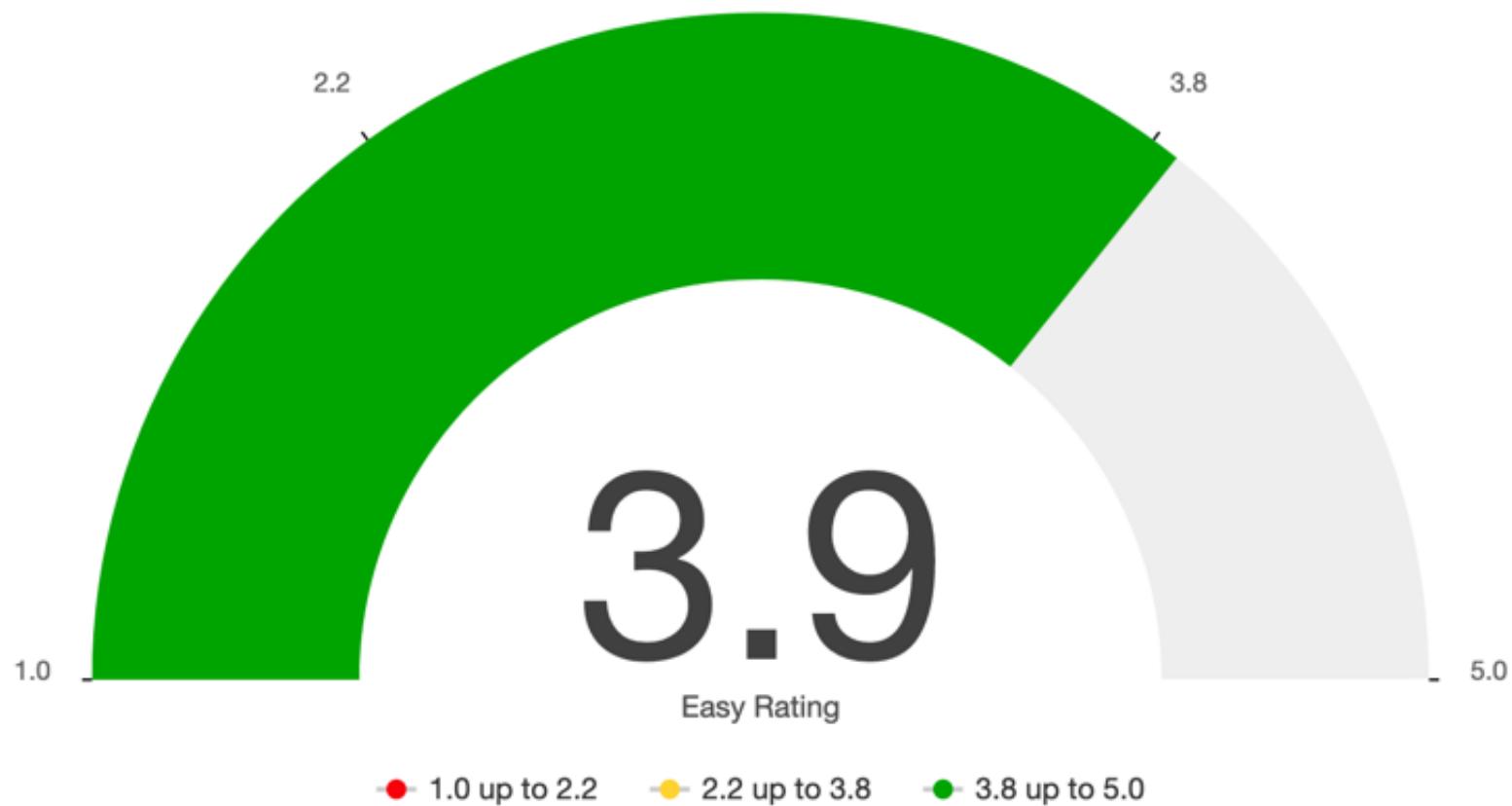


Q5: Were you able to unstick yourself?

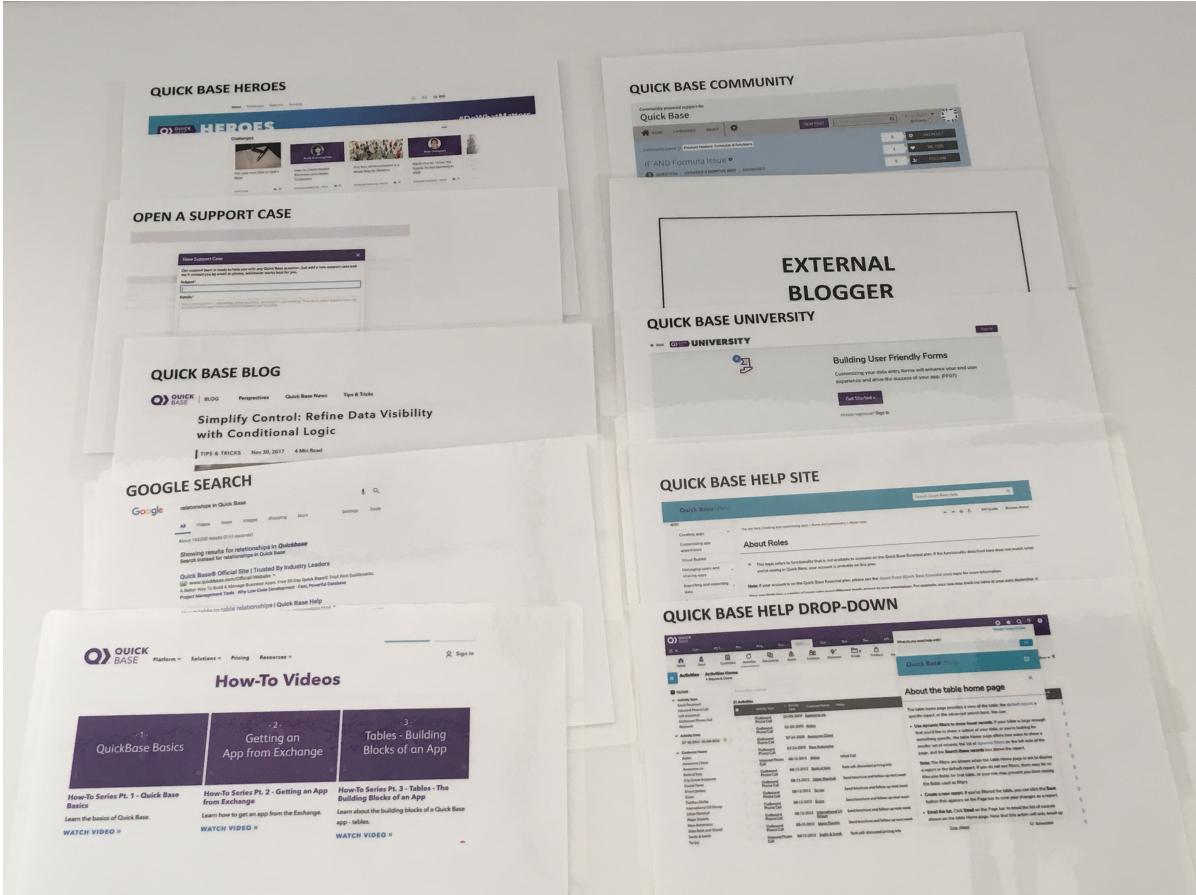


## Q6: How would you rate how easy it is to find the answers you need?

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?

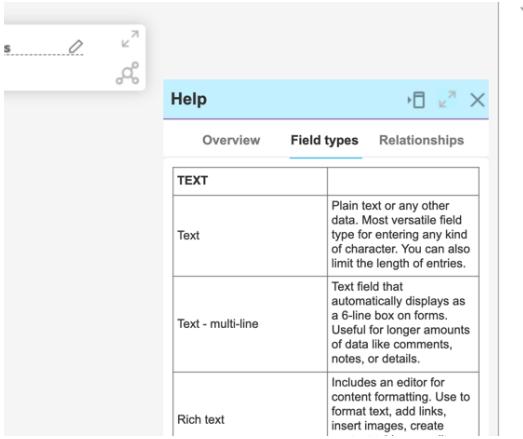
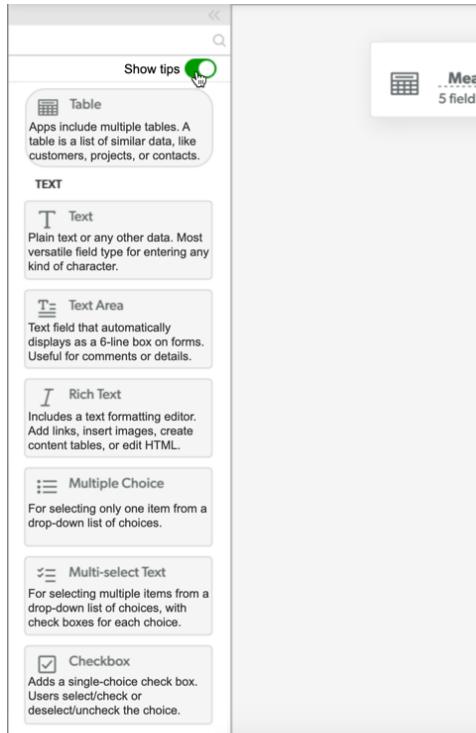


# Content ranking results



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



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

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

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.

I rarely need to  
use Quick Base  
documentation.

That is  
awesome!

Maybe a history  
of your  
searches might  
be helpful.

# Other discussions

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

**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 QBAlert, QBUndefined, etc.

**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.

**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

The screenshot shows a task management application interface with a purple header bar. The title bar reads "Tasks > Grouped by project, no filters" and "Reports & Charts". On the right side of the header are buttons for "+ New Task", "Favorite", "Try new report", and "Try new filtering". Below the header, it says "22 tasks". The main area is a grid table with columns: TASK, PRIORITY, STATUS, START, M..., HOURS, % COMPLETE, PROJECTED FINISH, DATE COMP..., ASSIGNED TO, ACTUAL COST, and BL. The grid displays tasks grouped by project, with sub-sections like "Customer Service System Update", "Development", "Testing", "Deploy Document Management", "Planning", "Meet with client team", "Usability testing", and "Finance system upgrade". Totals are shown at the bottom of each section. The total number of tasks is 192, and the total cost is \$2,219.

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	<input type="checkbox"/>	10	100%	06-11-2019	06-08-2019	Chris Baker	\$170	\$29
ROI assessment	High	In-Progress	06-12-2019	<input type="checkbox"/>	5	60%	06-14-2019		Colleen Garton	\$30	\$4
Prototype	High	In-Progress	06-17-2019	<input type="checkbox"/>	10	50%	06-20-2019		Colleen Garton	\$20	\$3
Storyboard	High	Not Started	07-10-2019	<input type="checkbox"/>	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	<input type="checkbox"/>	4	100%	05-13-2019	05-08-2019	Chris Baker	\$17	\$29
Usability testing	High	Not Started	05-29-2019	<input type="checkbox"/>	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.

- ① Inspect a record by selecting it
- ② Shift-click to inspect multiple records
- ③ Sidebar can show more info from report
- ④ Sidebar can stay open after you save

**POP-UP**

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

- ① Inspect a record by selecting it
- ② Pop-up can show more info than report
- ③ 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.

- ① Create or edit one record at a time
- ② Record is saved when you click or move to next row

**SPREADSHEET**

What about **Filtering in the new grid** is important to you, and what's missing? Add stickies below.

- ① Select columns, rows, or both
- ② Use clipboard actions like Fill down
- ③ 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**

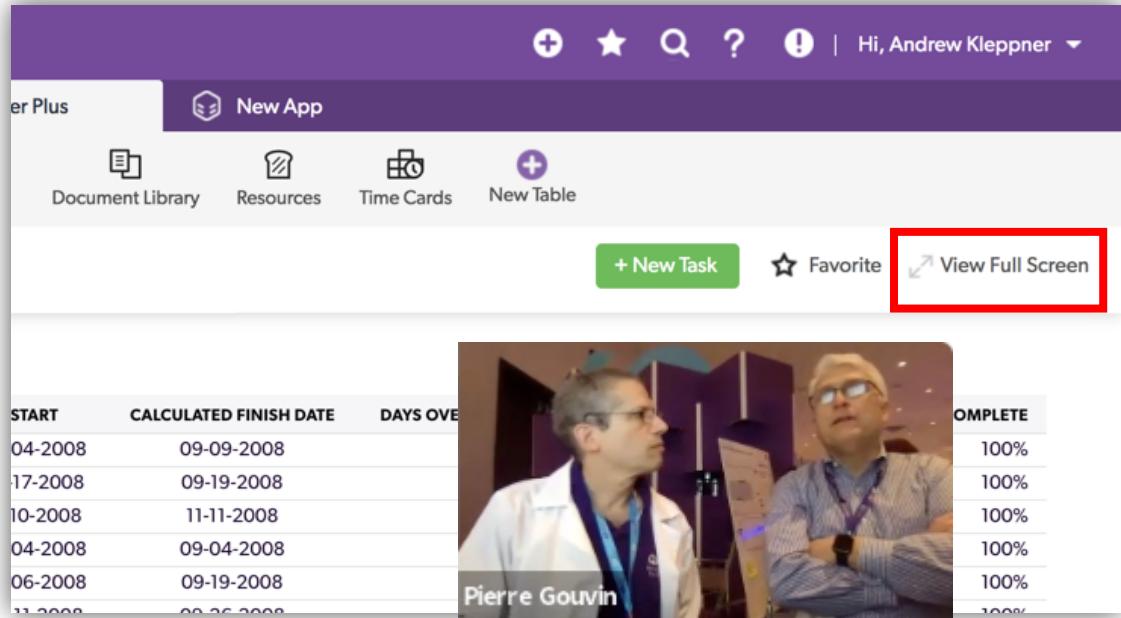
What about these two filtering schemes is important to you, and what's missing? Add stickies below.

- ① Filter on any field using filter bar
- ② Type your own filtering terms
- ③ Use dropdowns or pickers for your terms

**DYNAMIC FILTERS (TODAY)**

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 web-based application interface. At the top, there's a purple header bar with icons for adding a new app, document library, resources, time cards, and creating a new table. Below the header, a navigation bar includes buttons for '+ New Task', 'Favorite', and 'View Full Screen'. The main content area features a video feed of two men. To the left of the video is a table with columns for 'START', 'CALCULATED FINISH DATE', and 'DAYS OVE...'. The table lists several tasks with their respective dates and completion percentages (all at 100%). Below the table, a quote from Pierre Gouvin is displayed.

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

Pierre Gouvin

"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.



The screenshot shows a table titled 'All Tasks' with 41 entries. The table has columns for 'PROJECT PH...', 'TASK NAME', 'DUR...', 'MILE...', 'START', 'CALCULATED FINISH DATE', 'DAYS OVE...', 'STATUS', 'PRIORITY', 'ASSIGNED TO', and '% COMPLETE'. The data includes various tasks such as 'Upgrade DBMS', 'Install latest version of Finan...', 'Switch to T3', etc., with details like start dates (e.g., 09-04-2008), calculated finish dates (e.g., 09-09-2008), and completion percentages (e.g., 100%). A red box highlights the top right corner of the table.

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

"Having the option to go large helps"

Aaron Z.

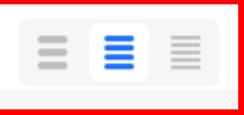
"[I would like it because] I do screen shots"

Victoria Y.

# Display density

Tasks > Task report  
▶ Reports & Charts

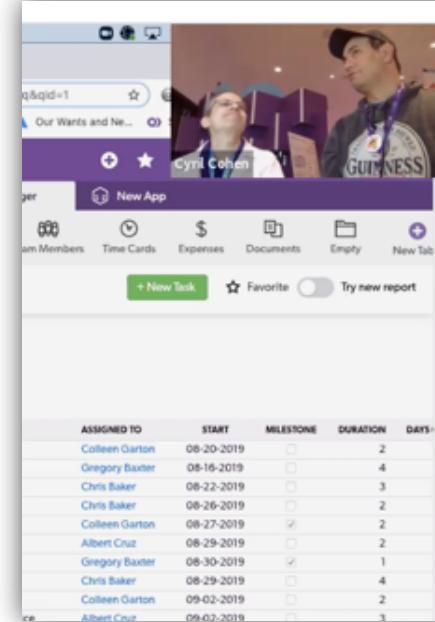
41 tasks



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

# Transition from viewing to editing

The screenshot shows a user interface for a project management application. At the top, there's a purple header bar with the Quickbase logo, navigation links like 'My Apps' and 'Backup', and a search bar. Below the header is a toolbar with icons for Home, Users, Projects, Tasks, Customers, Team Members, Time Cards, Expenses, Documents, Empty, Long table, and New Table. The main area shows a grid of tasks. A context menu is open over the third task in the list, which has a yellow background. The menu options include Cut, Copy, Paste, Fill Down, Reset to Original Values, Insert Blank Rows, Delete, Undelete, Undo, and Edit this Field's Properties... The grid contains several tasks:

Task Name	Assigned To	Start	Milestone	Duration (Days)	Days Overdue	Priority	Completed (%)	Actual Cost	Remaining Budget
Alpha test	Andrew Waltham	10-12-2019	<input checked="" type="checkbox"/>	3		High	20%	\$100.00	\$100.00
Beta test	Albert Cruz	10-17-2019	<input checked="" type="checkbox"/>	3		Medium	20%	\$100.00	\$100.00
Integration testing	Chris Baker	11-13-2019	<input checked="" type="checkbox"/>	5		Medium	0%	\$750.00	\$500.00

Below the grid, there are four blue callout boxes with quotes from users:

- "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.

At the bottom of the screen, there are navigation links for 'Customer Service System Update', 'In-Progress', 'Unit test', and a timestamp '09-28-2019'. There's also a footer with a page number '5' and a 'Medium' filter.

AutoSave ON

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

A Task Name Start Milestone Assigned To Duration

PROJECT NAME Customer Service Syst... 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

	Task Name	Status	Start	Assigned To
1	Alpha test	Not Started	6/22/2019	
2	Approval	Completed	5/10/2019	
3	Arrange switchover date	In Progress	6/22/2019	
4	Beta test	Not Started	6/22/2019	
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 <input type="checkbox"/>
		In-Progress	Install latest version 7.1	-	5/10/2019 <input checked="" type="checkbox"/>
		In-Progress	Switch to T3	-	6/3/2019 <input type="checkbox"/>
Subtotal					
T3 install (8)		In-Progress	Requirements review	-	6/3/2019 <input type="checkbox"/>
		In-Progress	Develop RFP	-	5/10/2019 <input type="checkbox"/>
		In-Progress	Buy application of choice	-	4/5/2019 <input checked="" type="checkbox"/>

# Filters

The screenshot shows the Quickbase interface with a purple header bar. The main content area displays a table of tasks under the heading "Tasks > Numbers by project, status". A sidebar on the left is titled "FILTERS" and contains several sections: "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), and "Task Name" (Alpha test, Approval, Arrange switchover date, Beta test, Buy application of choice, Client review, Deploy redesign, Deployment plan). The table itself has columns for Task Name, Assigned To, Start, Milestone, Duration, Days Overdue, Priority, % Complete, Date Complete, and Labor Costs Budget \$. A video overlay at the bottom features two men, Alex Morales and another man whose name is not visible.

"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.

This screenshot shows the same Quickbase interface as the first one, but with a simplified filter panel. The sidebar "FILTERS" is collapsed, and the table header now includes the "Labor Costs Budget \$" column. The video overlay at the bottom features two men, Alex Morales and Aaron Zielinski.

"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.

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

Victoria Y.

# Show totals, hide records

28 orders					
FLAVOR	UNITS	PRICE	ORDER	BUYER	
<b>Troop A (8 orders)</b>					
<b>Patrick (5 orders)</b>					
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					
<b>Marcia (3 orders)</b>					
Mint creme sandwiched by				Eryl Chester	
Chocolate and coconut				Carleen Daniels	
Minty nougat with caramel				Carleen Daniels	
TOT				Victoria Yusfin	\$66.67
AVG					
<b>"I really like that. The grouping has been a pain the neck, for just that reason."</b>					
<b>Pierre G.</b>					
<b>"I don't use averages, [so I'd like totals right in the headers]"</b>					
<b>Victoria Y.</b>					
<b>"That would save us from having to use two different reports"</b>					
<b>Max K.</b>					

28 orders					
FLAVOR	UNITS	PRICE	ORDER	BUYER	
<b>J Troop A (8 orders)</b>					
<b>J Patrick (5 orders)</b>					
TOT	19	\$120			
AVG					
<b>J Marcia (3 orders)</b>					
TOT	22	\$200			
AVG					\$66.67
<b>J Troop B (3 orders)</b>					
<b>J George (3 orders)</b>					
TOT	12	\$80			
AVG					\$26.67
<b>J Troop C (17 orders)</b>					
<b>J Jerry (5 orders)</b>					
TOT	19	\$120			
AVG					\$24
<b>J Li (12 orders)</b>					
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 Rodriguez	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 Rodriguez	54309879	July 1, 2018	CA	Add Contact
● Addie Lamb			CA	Add Contact
Bernard Reed			OR	Add Contact
Lora Greer			CA	Add Contact
Olive Warren			MA	Add Contact



"Showing it prominently is important"

Victoria Y.

"I'd like the ability to choose"

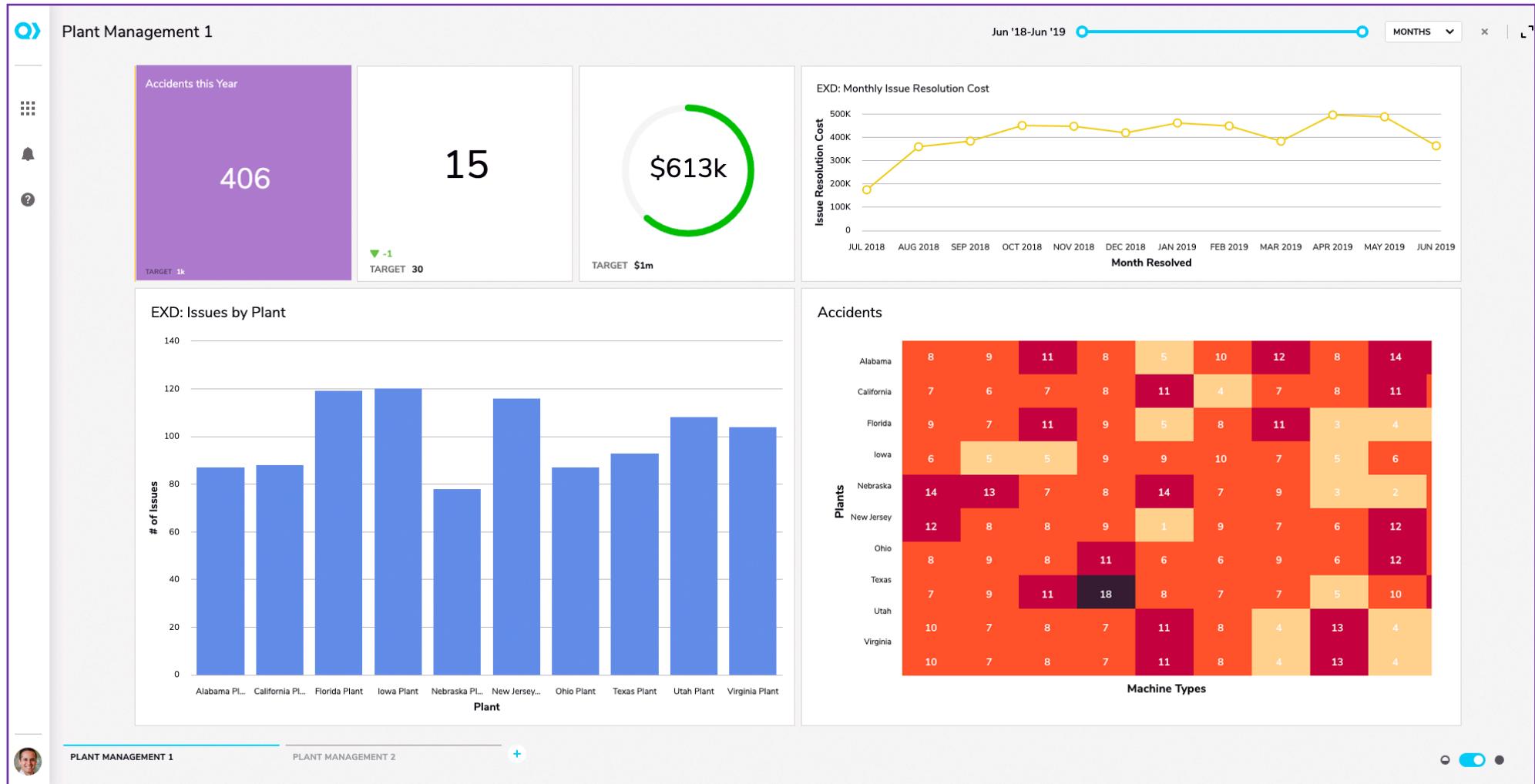
Aaron Z.

Ooh!

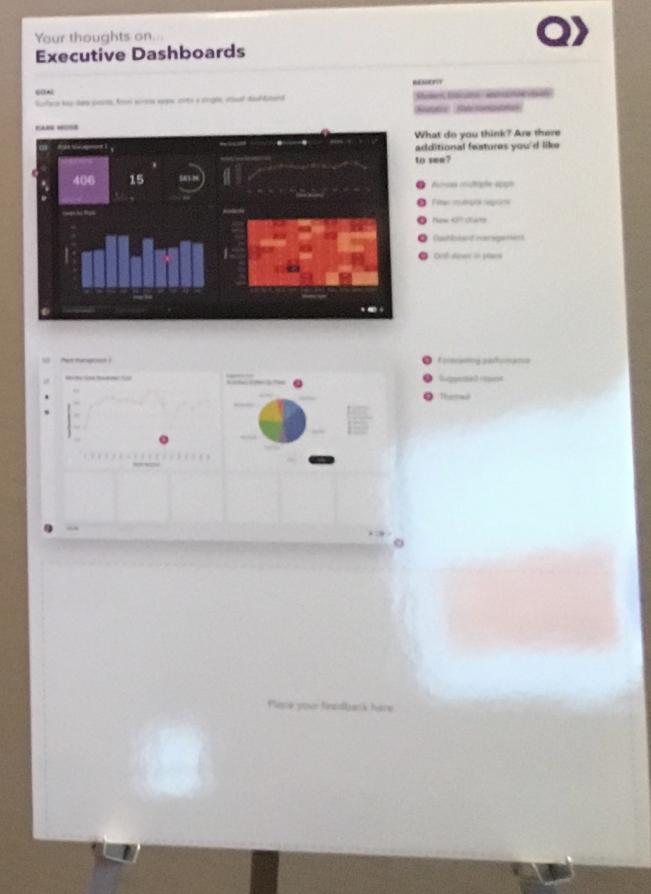


station 04

# Executive dashboards



Demo



# Executive dashboards

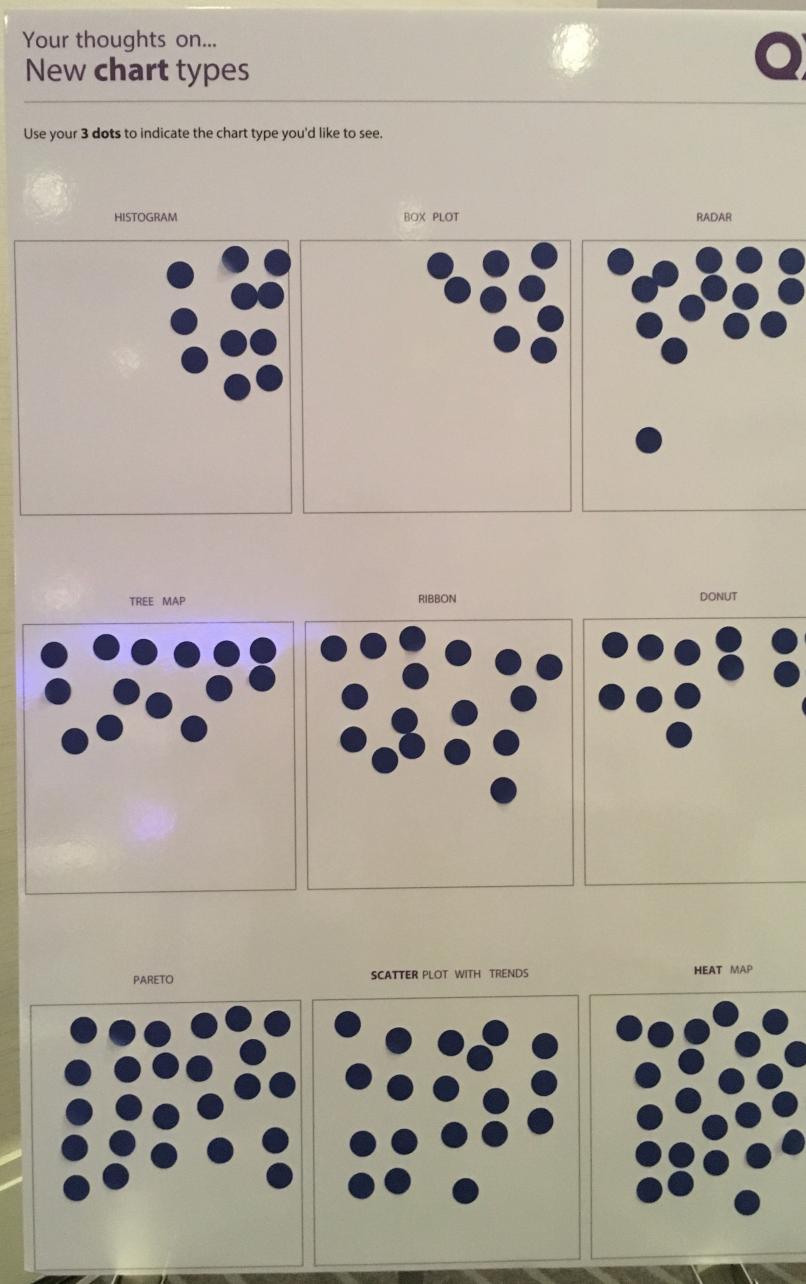


Chart	Design Lab + Kiosk Total
Heat Map (Geographically based)	58
Pareto	45
Scatter with trends	43
Tree map	32
Ribbon	29
Radar	28
Donut	16
Box Plot	15
Histogram	11
Double Gauge	2
Trailing MMT chart	2

Your thoughts on...  
**Executive Dashboards**



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



**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

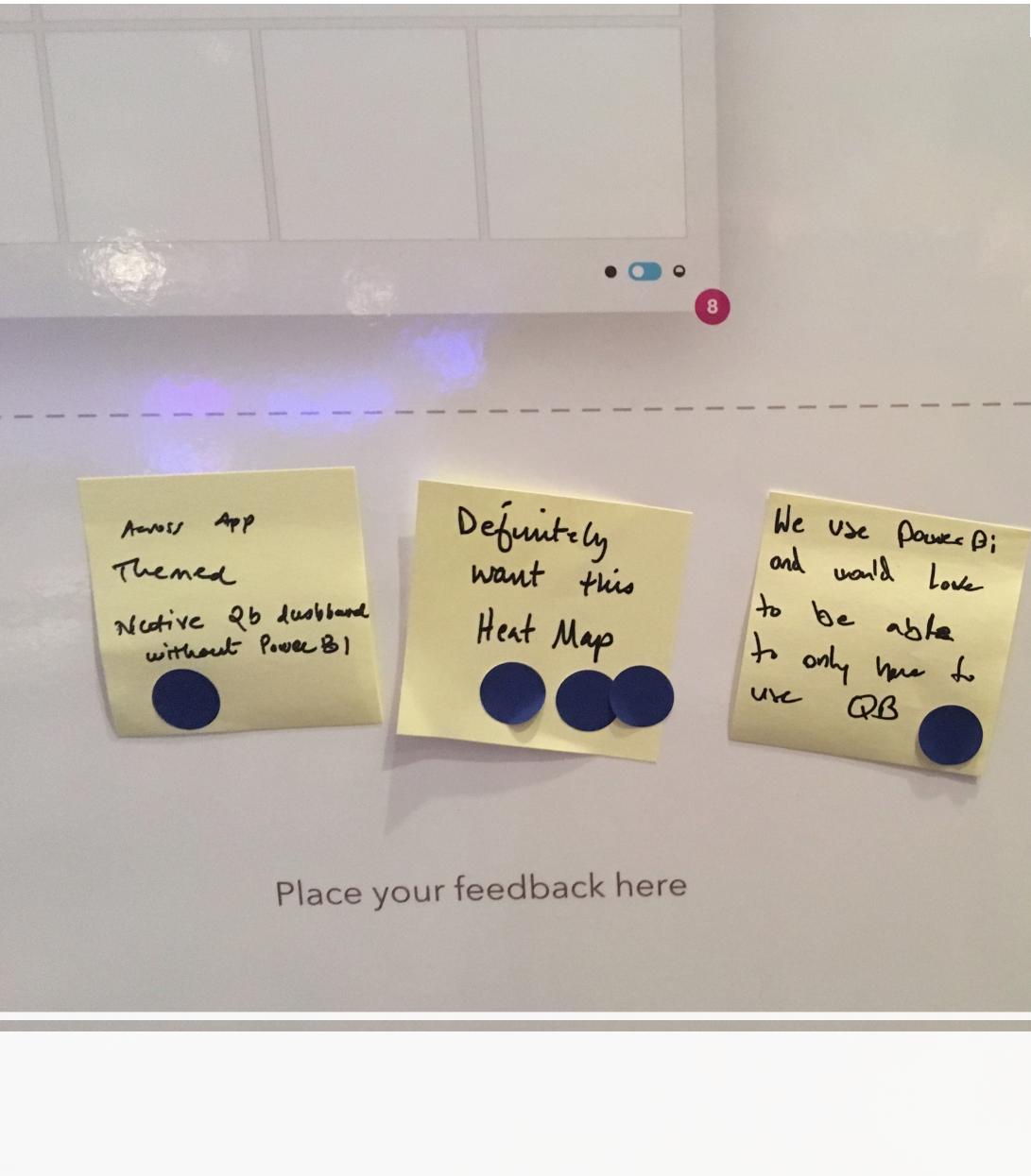
- ⑥ Forecasting performance
- ⑦ Suggested report
- ⑧ Themed

# 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



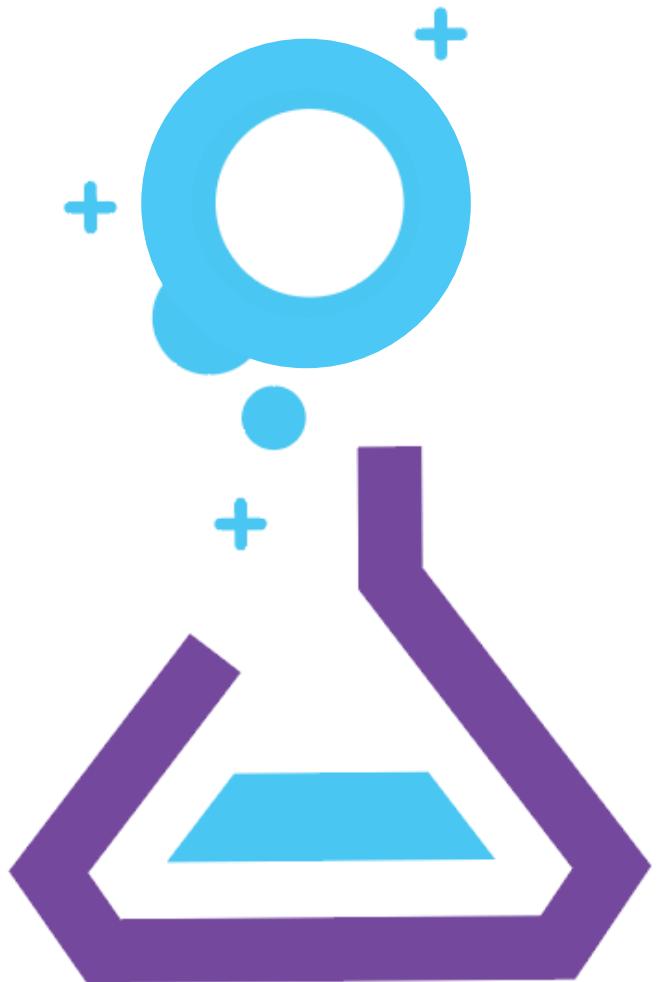
- Most people are happy without scrolling - tabs are fine
- Auto-refresh is a big deal on dashboards - don't want stale data
- Search would be a powerful feature to add
- Having 2 layers of organization gives them flexibility
- Many organizations really want geographic maps & filtering
- Most people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

**20**

Design Lab  
visitors

**28**

Kiosk & "Jon"  
visitors



**QUICK BASE**

# Design Lab