QuickBase – App Builder

Course description:

This course will teach how to create apps using QuickBase You will learn to plan your app development, add tables, fields, forms and other components related to app development.

Learning Objectives:

After completing this course, students will be able to:

- Identify the problem you want to solve, determine the data you need to collect, and plan how you will use the data to solve the problem.
- Create your first app. Add tables, define fields, create relationships between tables, customize forms and reports, and test and refine your app.
- Develop Your Hands-On Skills in building apps and completing the related eLearning content to become a proficient app builder in QuickBase.

Duration: 3 Days

Table of Contents:

Module 1: Getting started with QuickBase.

- Introduction to QuickBase
- Set up a builder account.

Module 2: Planning your App.

- The App Planning Framework
- The 5Ws and H
- The current future state

Module 3: Mapping your business process.

- Introduction to Mapping your business process.
- Macro process
- Micro Process
- The current and future state

Module 4: Modelling your app.

- Introduction to App modelling
- What is Data Modelling
- Building a Data model

- Best Practices – App modelling

Module 5: Documenting your App.

- Why Document your app
- Best Practices
- Storing App documentation for easy reference
- Documenting at the App and the Table Level
- Documenting at the Field level
- Documenting Formulas
- Creating a Change Log

Module 6: Building An App

- Introduction to building an app – Start with Tables and Fields
- Creating an App from Scratch
- Adding Records to your Table
- Adding a Second Table and looking at its fields
- Editing a table 's form and configuring Fields

Module 7: Relationships

- Introduction to Relationships
- Fields in a Relationship
- Properties of a Relationship
- Creating a Relationship
- Using a Relationship to relate records from different table.
- Creating a Detail table and Adding Look up fields
- Leveraging a relationship when adding records
- Creating summary fields

Module 8: Building User Friendly Forms

- Introduction to creating User Friendly Forms
- How forms work and their benefits
- Organize Forms and Customize fields.
- Dynamic Form Rules
- Creating Role Based Forms
- Form Views
- Maximizing Forms

Module 9: Distributing Data with Reports

- Introduction
- Report Benefits and Formats
- Create and modify a table report
- Create different types of Reports: Kanban/ Chart/ Calendar

Module 10: Customizing App and Table home pages.

- Introduction to Customizations
- Customise the Default Home Page
- Create an Alternate Home Page
- Associate Home Page with a Role
- Customize a table home page.

Module 11: Working with Roles and Permissions

- Introduction to Roles and Permissions
- Set up a new role.
- Assign, copy and delete a role.
- Testing Roles

Module 12: Using Email Notifications, Subscriptions and Reminders

- Introduction to Email messaging in QuickBase
- Sending Manual Emails
- Sending Automated Email notifications
- Sending Subscriptions
- Sending Reminders

Module 13: Managing your App.

- Introduction to Managing your App.
- Setting App Properties
- Getting information about your app
- Managing your App's Schema
- Managing App Contents and Ownership

Module 14: Using Relationships to solve complex Problems

- Introduction to Intermediate Relationships
- Table to Table Relationships
- Conditional Dropdowns
- Many to Many Relationships
- App to App Import
- QuickBase Sync
- Cross App Relationships
- Relationship Examples

Module 15: Managing your Apps with Roles

- Security Discussion
- Controlling app level permissions
- Limit User's Visibility
- Account Admin Functionality

Module 16: Distributing Data with Enhanced Reports

- Distributing Data with Enhanced Reports
- Report Links
- Display Reports in other Apps
- Summary Reports vs. Summary reports

Module 17: Gaining Efficiency through Formulas

- Introduction to Gaining Efficiency through Formulas
- Formula Resources
- Formula Examples
- Troubleshoot your Formula