



# Quickbase App Optimization Review

**Organization:** ACME Corporation  
**Application:** Project Manager

**Date:** 6/30/2023  
**Overall Rating:** 57

## Forms

Forms play a crucial role in a successful Quickbase app by ensuring a seamless user experience. When forms are easy to use and navigate, users can input and access data effortlessly. Clear record titles make it easy to identify and locate specific information, while organizing data into groups, sections, or tabs enhances clarity and organization within the forms.

**Are your forms easy for people to use? Do they have clear record titles? Is your information organized into groups, sections, or tabs?**  
Rating: 8

## Dashboards

Effective dashboards are essential for providing users with valuable insights and information at a glance. Informative and visually appealing dashboards engage users and facilitate better decision-making. Interactive dashboards enable users to explore data further, drill down into details, and customize views based on their specific needs. Choosing the right dashboard style, whether it's the old style or the new style, depends on the app's requirements and design preferences.

**Are your dashboards informative and attractive? Are they interactive? Do you use the old style or the new style?**  
Rating: 6

## Fields

Maintaining consistency in field naming conventions is crucial for efficient data management and reporting. It ensures that fields are easily identifiable and reduces confusion for users. Additionally, marking only the necessary fields as reportable helps streamline reporting processes and avoids cluttering reports with irrelevant information.

**Do you have a consistent naming convention? Are ONLY fields that should be used in reports marked as reportable?**  
Rating: 5

## AI & Workflows

Workflow automation can help you cut business costs by eliminating expensive errors and streamlining your processes to help employees complete tasks more efficiently. They can also save money on administrative labor because repetitive, time-consuming tasks will be done automatically.

**Does your application automatically create the right tasks for each project? Does it let approvers know when they need to sign-off on a task?**  
Rating: 4

## Reporting & Analytics

The availability of the right reports is vital for users to extract valuable insights and make informed decisions. Eliminating redundant reports minimizes maintenance efforts and ensures a streamlined reporting system. By utilizing a variety of report types, such as summary reports, charts, and cross-tab reports, users can analyze data from different angles and gain a comprehensive understanding of their business processes. By incorporating analytics capabilities, such as generating key performance indicators (KPIs), data visualization, and trend analysis, the application empowers users to track and measure important business metrics effectively.

**Does your application quantify the results you need? Are your reports helpful to users? Are your reports redundant and hard to maintain?**  
Rating: 7

## Roles

Maintaining a well-structured role hierarchy is crucial for effective user management and data security. Limiting roles to a manageable number, ideally eight or fewer, prevents role proliferation and simplifies administration. Ensuring that roles have active members reduces the risk of unauthorized access. Furthermore, having a limited number of people with admin access enhances security and reduces the potential for accidental misconfigurations.

**Are your roles limited to 8 or fewer? Do you have roles with no members? Do you have less than 3 people with admin access?**  
Rating: 6

## Standardized Format

An app that reflects the branding and identity of the company fosters a sense of familiarity and professionalism. By maintaining a standardized format that aligns with the company's visual guidelines, the app becomes an extension of the organization's brand and creates a cohesive user experience.

**Is your app representative of your organization?**  
Rating: 3

## Security

Protecting confidential data is of utmost importance in any application. Implementing robust security measures, such as access controls, user permissions, and data scanning, ensures that sensitive information remains secure and safeguarded from unauthorized access or data breaches.

**Is your confidential data protected?**  
Rating: 8

## Data

Effective data management is crucial for maintaining accurate and reliable information. Creating tables dedicated to managing critical lists and data sets helps centralize and organize data, making it easily accessible and reducing redundancy. Well-structured data tables enhance data integrity and improve overall app performance.

**Do you have tables to manage critical lists and data sets?**  
Rating: 7

## Scalability

A successful Quickbase app is designed with scalability in mind. It should be flexible and adaptable to accommodate the evolving needs of the organization. By building the app with scalability in mind and considering future growth requirements, it can easily expand and evolve alongside the organization's changing demands.

**Is your application built to grow and evolve with the organization?**  
Rating: 3

## Summary



## Results

**Below 49**  
An app that falls within this range indicates significant areas of improvement and a need for immediate attention. It suggests that the application lacks essential elements and may be struggling with user experience, data management, security, scalability, or other critical aspects. A score below 49 implies that the app may not effectively meet user needs, lacks proper organization and structure, and potentially poses security risks. It signals a clear need for substantial enhancements and remediation to elevate the app's overall functionality and performance.

**Between 50 and 74**  
An app falling within this range suggests moderate performance and functionality. It indicates that while the application has made some progress in certain areas, there is still room for improvement. The app may possess satisfactory features, usability, and security measures to a certain extent, but there are still gaps that need to be addressed. Users may find the app usable but may encounter some limitations or areas that could be enhanced for a better experience. This score range highlights the need to continue refining and optimizing the app to reach its full potential and provide users with a more seamless and comprehensive solution.

**Above 75**  
An app that receives a score above 75 demonstrates a strong performance and indicates a well-optimized and highly functional application. It suggests that the app excels in multiple areas, including user experience, data management, security, scalability, and more. Users can expect a smooth and efficient experience with intuitive forms, informative dashboards, comprehensive reports, robust security measures, and scalable infrastructure. An app scoring above 75 showcases a commitment to excellence and ongoing efforts to deliver a top-notch QuickBase solution. It signifies that the app has reached a level of maturity, providing users with a valuable and reliable tool for their business needs.

This score not only signifies a well-optimized and highly functional application but also suggests that the app is primed for further expansion and enhancement. With a solid foundation in place and a high level of performance, it may be an opportune time to consider adding more workflows and operations to the app. This score range indicates that the app can handle increased complexity and additional functionalities, making it an ideal candidate for scaling and accommodating evolving business needs. By leveraging the app's strong performance, organizations can confidently explore and implement new workflows, automate processes, and unlock even greater value and efficiency within their operations.

**Note:** These grade ranges are provided as a general guideline and interpretation of the scores. The specific implications and actions required may vary depending on the context and specific requirements of the application and its users.