Quick Base Release Notes

2011

There were nine Quick Base product releases in 2011:

Date	Highlights
January 23rd	UI improvements for managing users, RID mode added for API_DoQuery
February 20th	Advanced filtering for reports, improved UI for default report settings
March 13th	Ability to hide field in filter/sort lists ("Reportable" field property)
May 22nd	List – User field type, advanced filtering for Advanced Find, Email Notifications, and Email reminders
July 10th	Copy Master and Details Records tool, ability to import XLSX files
August 14th	Test As Role, improved UI for setting passwords
September 11th	New password requirements
October 2nd	Manage File Attachments page
December 4th	Get Started widget, What Is modules

January 2011 Release Notes [[return to top]]

We're ringing in the New Year with new features designed to make it easier to manage and share your QuickBase applications.

What's new in QuickBase?

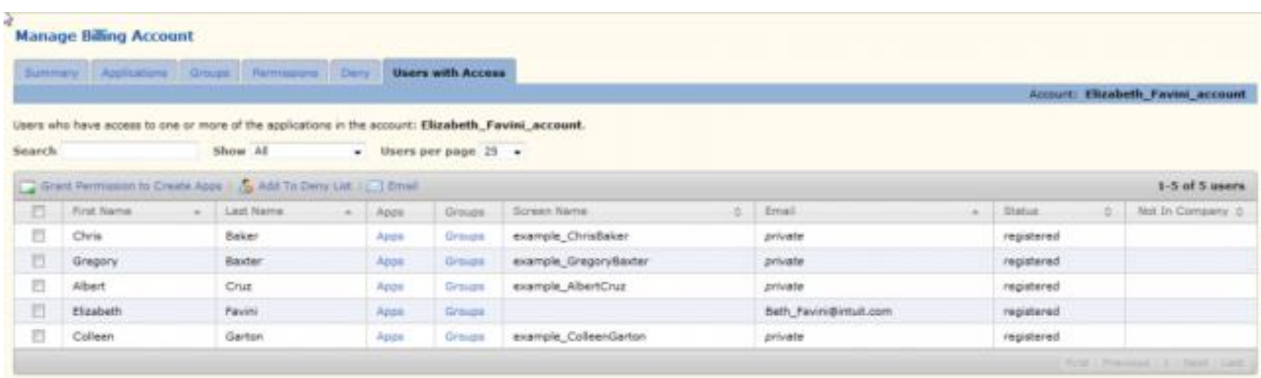
Look for these new features in the January 23, 2011 release of QuickBase:

- Assign Create App permissions to Users with Access
- Import users using the Users menu
- Tell QuickBase to return record IDs with the API_DoQuery call

Allow more users to create QuickBase apps

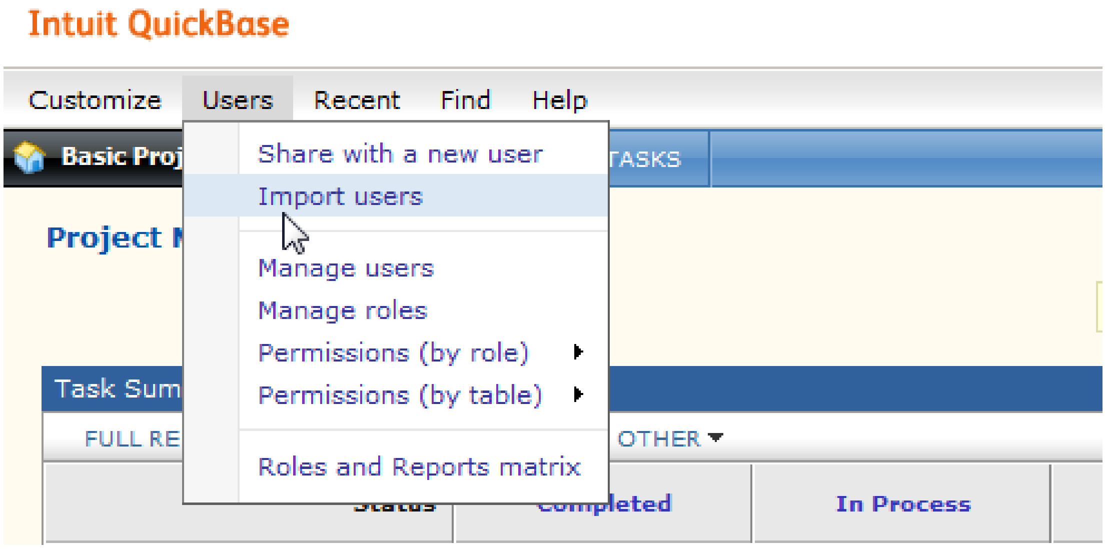
You know that QuickBase helps you solve business problems—why not let more members of your organization in on the secret? Unleash the creativity and wisdom of your team by giving more members permissions to create applications within your account.

Billing Account Administrators can go to **Manage Billing Account** > **Users with Access** to quickly and easily assign Create App permissions for many users at one time:



Import users using the Users menu

Have you ever had trouble finding the option for importing users? Well, search no more! We've added this option to the **Users** menu, putting it front-and-center, where it belongs:



You can still import users using the "*I Want To…"* link on the Manage Users page…but we hope that adding this option to the Users menu makes it easier for you to find this option when you need it.

Change to API_DoQuery: Include Record IDs

For QuickBase API users, we've also enhanced the API_DoQuery call. We've added the includeRIDs option, which lets you specify that you want record IDs returned with each query.

What's fixed in QuickBase?

On January 23, you'll also see that we've resolved a number of issues. (As always, all QuickBase releases include bug fixes from previous releases).

Issue	Description
QBE004960	QuickBase returned an HTML response when users tried to upload a large file that exceeded data limitations using API_AddRecord or API_EditRecord. This issue has been resolved. QuickBase now returns this XML response: <qdbapi> <action>API_AddRecord</action> <errcode>78</errcode> <errtext>Data limit exceeded

	- request too large</errtext> </qdbapi>
QBE005002	The **Find** menu always defaulted to *All Tables*, regardless of the setting you specified in **Application >Advanced Settings.** This issue has been resolved; QuickBase now sets the default table in the Find menu correctly.
QBE005114	When QuickBase calculated the standard deviation for identical values under .05 (example: 3 records with field values equal to .049), the calculation for the standard deviation incorrectly equaled -1; it should have equaled 0. This issue has been resolved.
QBE005148	Users running reports with *Ask the User* filters were prompted to choose either *the value* or *the value in the field* when specifying the right criteria *The value in the field* option no longer appears when users run *Ask the User* reports.

February 2011 Release Notes [return to top]

We know you rely on data stored in your QuickBase apps to make critical business decisions. And, when you need data to support decision-making, you need to access it quickly and easily. In our February release, we'll help you do just that by introducing three new tools to make finding important data more intuitive. It's never been simpler to create complex queries that enable you to drill down into specific data. We're also giving app admins greater control over who can edit critical reports to simplify set up of reporting defaults. In addition, we've made it easier for users to identify records when adding or changing data by giving app admins the ability to customize Edit Record and View Record form headings.

And, we continue to make QuickBase more reliable and stable by fixing a number of bugs as well.

- What's new in QuickBase?
- What's fixed in QuickBase?

What's new in QuickBase?

- Users can create precise reports using ANY and ALL
- App admins can control who can customize reports
- Set reporting defaults in one place
- Change the heading that appears when you view or edit records

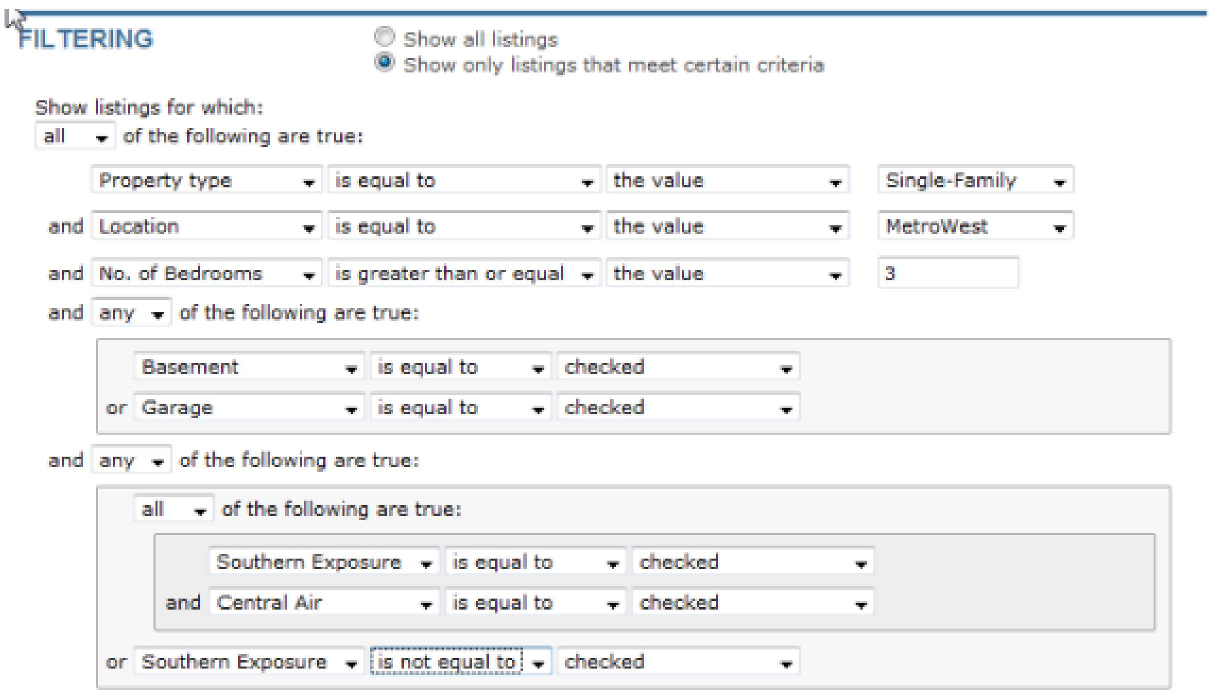
Create precise reports using ANY and ALL

In the Report Builder, QuickBase will now let you find data that meets ALL or only SOME of the filter criteria you specify. That means you can create more precise queries without having to write complicated formulas.

The new filter interface lets you select either ALL or ANY as operators that apply to a set of criteria, effectively creating AND and OR conditions within your query. You can create different sets of criteria, and can nest up to three levels.

Check out the example below. In an app that tracks real estate listings, this query finds all Single-Family homes in the MetroWest location with 3 or more bedrooms that have:

- Either a basement or a garage
- Either Southern Exposure AND Central Air conditioning OR no Southern Exposure



Control who can customize your reports

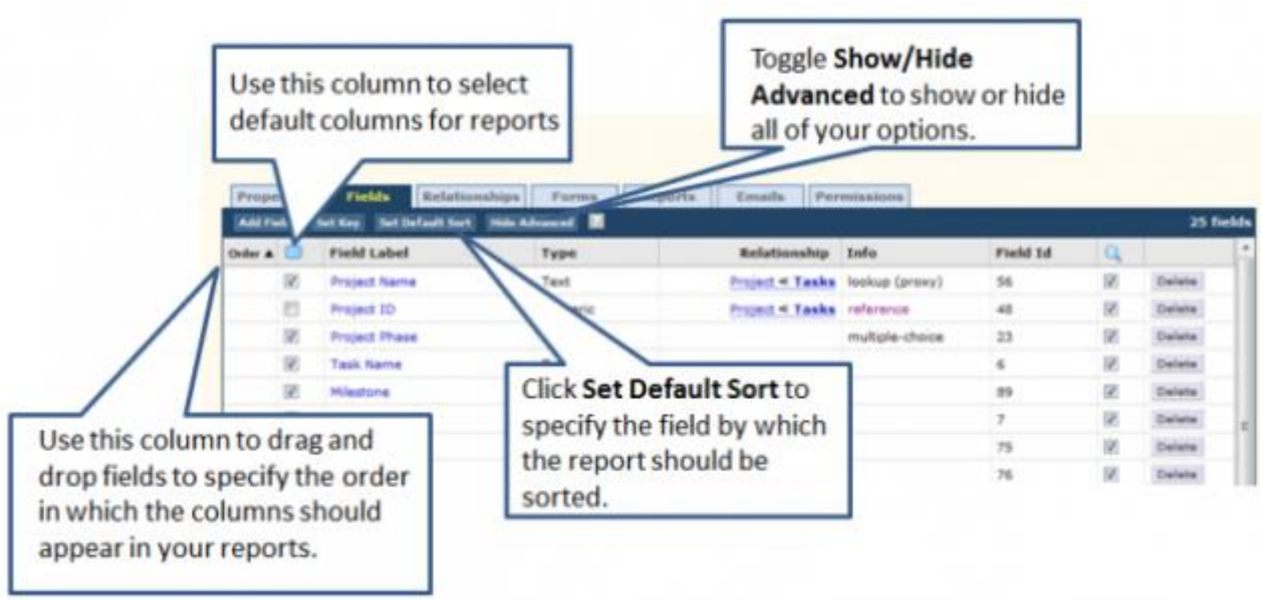
App admins can get greater control over who can and cannot edit their most critical reports. You can now choose to hide the *Customize This Report* link from users in a particular role. (Set this option on the **User Interface** tab on the **Roles** page.) When you choose this option, users in the role won't see the **Customize this Report** link on displayed reports, nor will they be able to right click to edit the report onscreen. This setting applies to all reports in the application, shared or personal.

Note: If you choose to select this option for a role, be sure to also hide all tables, as shown in the illustration below. If you choose to hide only the **Customize this Report** link, users will be able to create reports that they can no longer edit.

Set reporting defaults in one place

In previous releases, app admins could define the *default columns* used in QuickBase reports using something called *the Default Report*. In our February release, we've made it easier to access default reporting settings, consolidating these options on the Field list page for a table. On this page, you can tell QuickBase:

- Which columns should be the default columns
- The order in which default columns should be displayed
- The field by which the report should be sorted and the default sort order



QuickBase uses the reporting defaults you specify when:

- QuickBase displays results of any **Find** operation.
- You display detail (or child) records by clicking a report link field in a master record.
- You display detail (or child) records by clicking a summary field in a master record.
- You embed a details table in an exact form.
- You use the QuickBase API to return a report (API_DoQuery without specifying the clist parameter).

Change the heading that appears when you view or edit records

We’ve gotten lots of feedback about the heading that appears on the forms used to edit and view records. In past releases, this heading was made up of:

- The noun used to identify records in the table (for instance, Contacts, or Tasks)
- The value in the key field (usually the record ID)

Your feedback told us that this was not always helpful—in some cases, you wanted to be able to use the value in another field, such as an invoice number, in place of the key field.

We listened to that feedback and, in the February release, app admins will see that they can define something called the **Record Name** for each table. The example below shows the edit record form if you've chosen Task name as the Record Name for the Tasks table:

Go to **Customize *table*-> Properties ->Advanced Properties** to access this feature. In the **Record Name** field, simply select the field you'd like to use in place of the key field in the heading on the edit/view record form.

What's fixed in QuickBase?

We're continuing to focus on quality and have fixed a number of bugs in this release. (As always, all QuickBase releases include bug fixes from previous releases).

Issue	Description
QBE002107	If a role was set up with table-level access but the Application level permission set to *None*, users could still access table-specific information in some cases. This issue has been resolved so that Application-level permissions set to *None* override any table-specific settings. **Note:** If you use the QuickBase API to submit data to your app via a web form, you must ensure that the role used to submit the data has at least *Basic Access* application permissions. If the app level permission is set to *None*, you will receive an error message when data is submitted. Note that this includes

	scenarios where a “user agent” submits data on behalf of anonymous users, or where the data is submitted through the ”Everyone on the Internet” persona.
QBE004512	QuickBase did not allow you to convert a field to a lookup field. This issue has been resolved.
QBE005004	In Google Chrome, the wrong message displayed in the dialog box that displayed to warn users that they would lose changes if they navigated way from the **Roles > Permissions** page without saving. This issue has been resolved.
QBE005021	The API_GetUserRole call has been modified. If you use the *inclgrps* parameter, QuickBase will return all roles assigned to a user, including those assigned to a user because he or she belongs to a group. When you use this parameter, the response will identify the roles type; it will tell you whether the role is assigned to: • a user • a group • a domain group
QBE005027	In Internet Explorer 7 and 8, an issue occurred when you configured a role’s permissions and set the fields to **Custom Access**. When you clicked **Edit**, the section that allowed you to set custom access for fields appeared far to the right. This issue has been resolved.
QBE005123	A problem occurred when you tried to add a record using a report link field that contained a formula-text field on a form through grid-edit. QuickBase would not save the new record and displayed an error. This issue has been resolved.
QBE005159	QuickBase displayed an error message that was not helpful when there was an error building a conditional dropdown. The error message has been changed to include more details about the problem.
QBE005164	The API_SetKeyField call returned a parsing error. This issue has been resolved.
QBE005168	App admins were not able to specify a field other than the key field to appear in the heading of Edit Record and View Record forms. This issue has been resolved.

	In the February release, app admins can go to **Customize Table > Properties > Advanced Properties** and choose a new field to appear in the Edit/View Record header using the **Record Name** field.
QBE005183	When users tried to open a Microsoft Office document (using Internet Explorer 8 and Windows 7), they were requested to log in. This issue has been resolved.

March 2011 Release Notes [return to top]

Our March release continues our theme of better QuickBase reporting, adding a feature that'll help speed up and simplify report creation for your users.

- What's new in QuickBase?
- What's fixed in QuickBase?

What's new in QuickBase?

QuickBase now lets you limit the number of fields to choose from when building a report. This means that you can spend less time scrolling through fields that you won't ever need for searching and reporting.

Make a field *reportable*

By designating a field as *reportable*, you tell QuickBase to make that field available in the Report Builder for filtering, sorting, and grouping reports. Making a field reportable also makes it available as a column that will display on a report.

Outside of the Report Builder, reportable fields are available in most places where you can specify filter criteria. That is, you'll be able to select reportable fields when you

- perform an **Advanced Find** operation
- specify additional criteria in Email Reminders
- create advanced criteria in Email Notifications

When a field is NOT reportable, it won't be available in the filtering, sorting, or grouping UI in the Report Builder. You won't be able to select it to appear as a column in any report. And, it won't be available for filtering in any of the scenarios listed above.

Note that fields are marked reportable by default.

Automatically hide iCal, vCard, Report Link, and Formula URLs

There are certain field types on which you'll never need to filter, group, or sort: namely iCal, vCard, Report Link, and Formula URL fields. Because of this, these field types will NEVER appear in the field lists used for filtering, sorting, or grouping, regardless of whether you turn on the Reportable option or not.

What about existing reports?

If any of your existing reports filter, group, or sort on a field that is no longer reportable, the report will still work correctly. Fields that aren't reportable will appear in red font in filtering, sorting, and grouping criteria, as well as in available columns.

Fields that aren't reportable will remain in the report, notification, or reminder unless you change selections that use them. If you do so and save, the field that's not reportable will not be available for selection the next time you modify the report, notification, or reminder.

What's fixed in QuickBase?

We're continuing to focus on quality and have fixed a number of bugs in this release. You'll see these fixes when we release on 3/13/2011. (As always, all QuickBase releases include bug fixes from previous releases).

JavaScript issues

Issue	**Description**
QBE001910	A JavaScript error occurred when you tried to customize a report using the Customize this Report link where the following advanced options in the Report Builder were both unchecked: Show Main table and Show Summary table. QuickBase now requires you select one of these options to save a report. QuickBase also requires that you choose a field for grouping if you choose Show Summary table.
QBE004835	If a form contained a portion of a conditional dropdown (i.e, contained the dependent, but not the master field), a blank form was displayed and a JavaScript error occurred.

QBE004882	A problem occurred if you created a formula URL field that contained JavaScript used to open the page in a new window. When users clicked the field, the browser showed a blank page.
QBE004883	When you clicked the Preview button on the UI Tab of the Manage Realm page in Internet Explorer (IE) 8, a JavaScript error occurred.
QBE004902	On the iPad/iPhone/iPod touch, if an app menu bar contained more tables than could display on one screen, the table menu bar extended beyond the size of the screen, causing you to have to scroll horizontally to see all tables. This behavior is now the same as on a desktop browser; QuickBase displays an *.etc* dropdown, allowing you to view the tables without scrolling.
QBE004926	A JavaScript error occurred in IE 8 when you clicked the application link for a user (in the dialog that appears when you choose **Manage Billing Account > Users With Access** and click the Apps link for a user.)
QBE004994	A JavaScript error occurred on the final page of the Create Relationships wizard while creating a cross-application relationship.
QBE005017	Reports formatted as XML and using an XSL stylesheet where the stylesheet was a dbpage displayed as a blank page in Windows Safari.
QBE005019	A JavaScript error occurred when the Resource Allocation Tool was used.

General issues

Issue	Description
QBE005022	The Find a Developer link in the Application site map went to the wrong site.
QBE005054	For QuickBase Enterprise only: The Performance Bar incorrectly displayed Version IE 7.0 in IE 8 browsers.
QBE005135	If a user was created recently and the user's email address contained an apostrophe, it may have been stored incorrectly. QuickBase didn't properly display it on the Users With Access page and they did not receive email reminders or notifications. Going forward, email addresses containing

	apostrophes should be created correctly. If you see a problem with one on your Users With Access page, please contact support to have it fixed
QBE005137	If a table was hidden from a user, or if the user had no access to any reports in a table, the user was still able to see the table name on the left of the application dashboard.
QBE005197	Users using the Safari browser were unable to sign up for a QuickBase plan or change their credit card information.
QBE005215	The API_GetAncestorInfo call had been removed from the QuickBase API. It has been restored.
QBE005218	The Edit Contact Preferences link in the user profile now links to a new Manage Your Subscriptions page.
QBE005228	The API_GetUserRole call required users to have Sharing or Full Admin permissions. In this release, users who do not have Sharing or Full Admin permissions can use this call to get their own role only. Sharing/Full Admin permissions are required to return the roles of other users.

May 2011 Release Notes [return to top]

Please note that the date for this release has changed from May 8 to May 22.

In our May release, you'll find new features designed to help you create more powerful, versatile apps. From allowing you to select more than one user in a single field, to letting you filter long lists of users, the new release makes QuickBase better and more flexible. And, from the "We're listening" category, we've changed how you manage field order in your tables, making it easier for you to add and move fields to just where you want them.

- What's new in QuickBase?
- What's fixed in QuickBase?

What's new in QuickBase?

Our May release introduces these features:

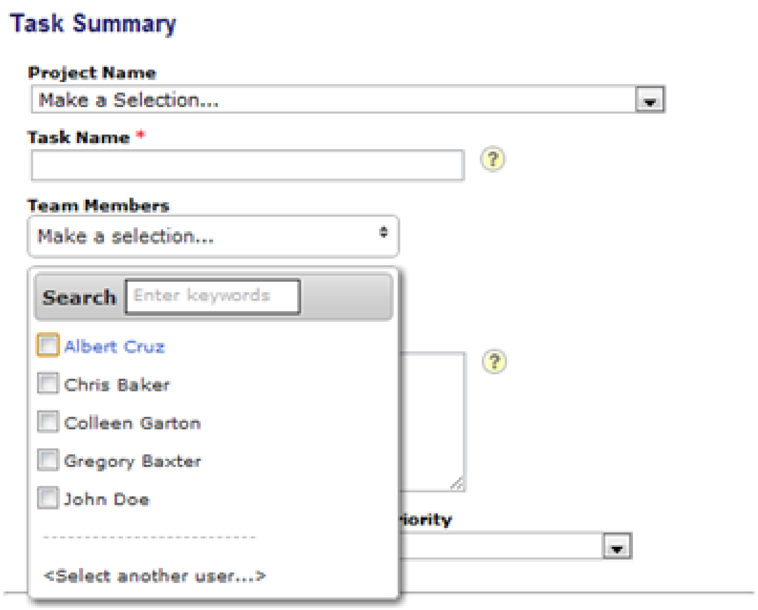
- Choose more than one user in a single field
- Display choices in multiple choice fields as radio buttons
- Give users in your company the ability to create QuickBase apps
- Use Any/All in more places
- Filter long lists of account or realm users
- Reorder fields more easily

Note: If a data entry form includes both an editable grid and a multi-line text field, an email notification may be triggered incorrectly the first time a record is edited and saved after the upgrade to the May QuickBase release. QuickBase may indicate that the multi-line text field has been modified even when no changes have been made to that field. This happens only once and only on records where multiple lines of data from an email program or word processor have been pasted into the multi-line text field. QuickBase behaves as expected for subsequent edits and does not send an email notification unless the data changes.

Choose more than one user in a single field

QuickBase now provides a "list-user" field type, which gives you the ability to choose more than one user in a single field. When you use this field type, application users can choose up to 10 users when completing the field.

List-user fields can be configured to let you select from all users who are in either the default or custom user set for the field. Here is what it looks like when you enter data into a list-user field on a form:



Using the Search box at the top of the list, you can narrow the list. You can use the <Select another user...> option at the bottom of the list to select a user who is not in the default or custom set.

You can use the new list-user field in permissions, form rules, and reports, and the corresponding UserList data type in formulas.

Reporting with list-user fields

With the introduction of list-user fields, you'll notice a small change in the Report Builder. If you create a filter using a list-user field, you can choose a new operator: **Includes/Does not include**. This operator lets you look for records where a list-user field contains a set of users you specify. QuickBase finds a match if the users you specify are at least a subset of the users contained in the record.

If you are creating a query using the QuickBase API, you use the HAS/XHAS operators to find sets of users within a list-user field.

Display choices in multiple choice fields as radio buttons

The new release lets you choose whether you want the choices in multiple-choice fields to display in a dropdown (the default) or as radio buttons. A new option on the Forms Layout page is available for Text-Multiple Choice fields: **Show choices as radio buttons (instead of dropdowns).**

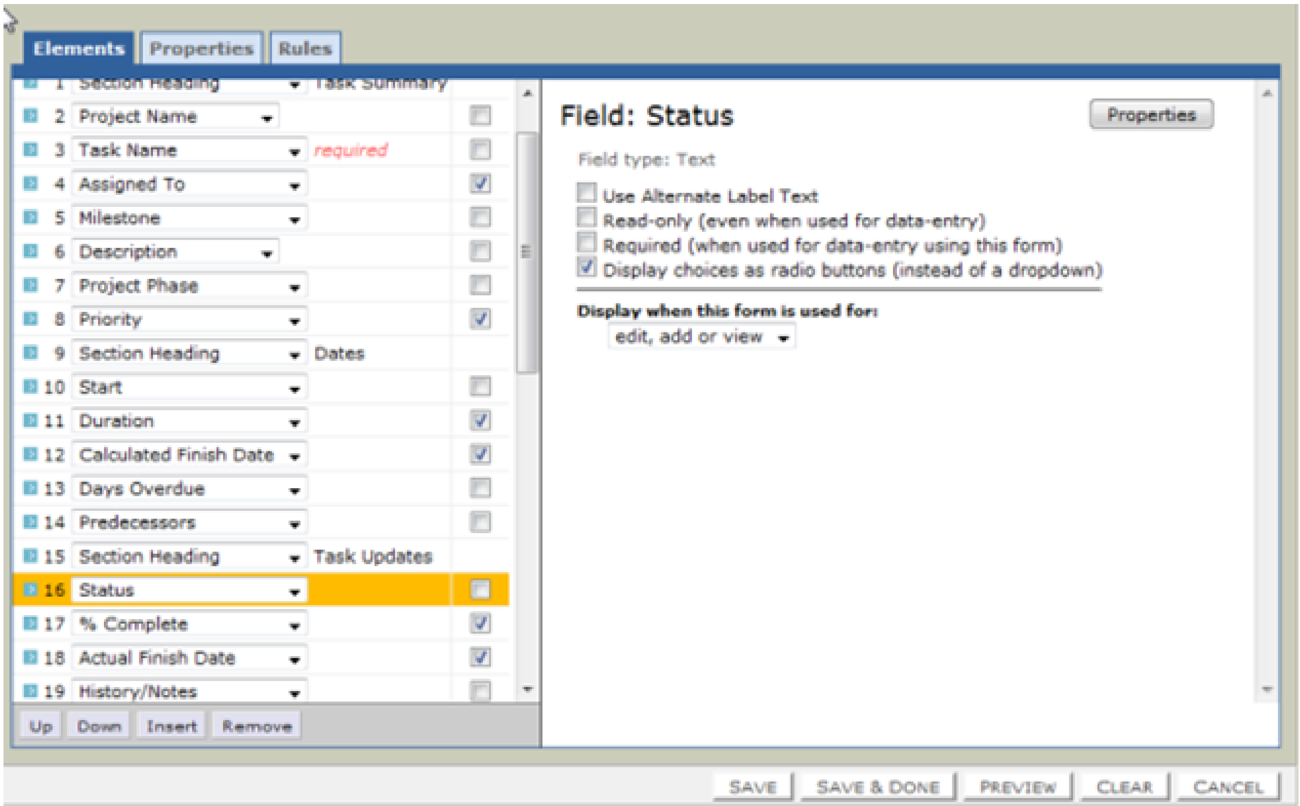
There is one limitation to be aware of. If you choose this option, users will not be able to “add new choices” to the multiple-choice list, regardless of whether the field’s properties specify that they should. New choices can be added only from the Field Properties page.

To set this property:

1. In the table menu bar, click a table name and choose **Customize <*tablename*> Table > Forms.**

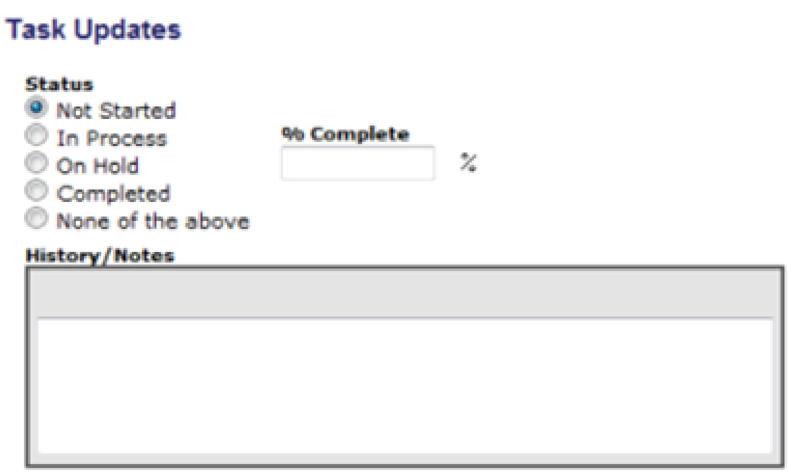
2. Choose **Edit the Layout** of a form.

3. Click a multiple-choice field that appears on the form. The form properties for the field appear to the right.



4. Choose **Display choices as radio buttons (instead of a dropdown).**

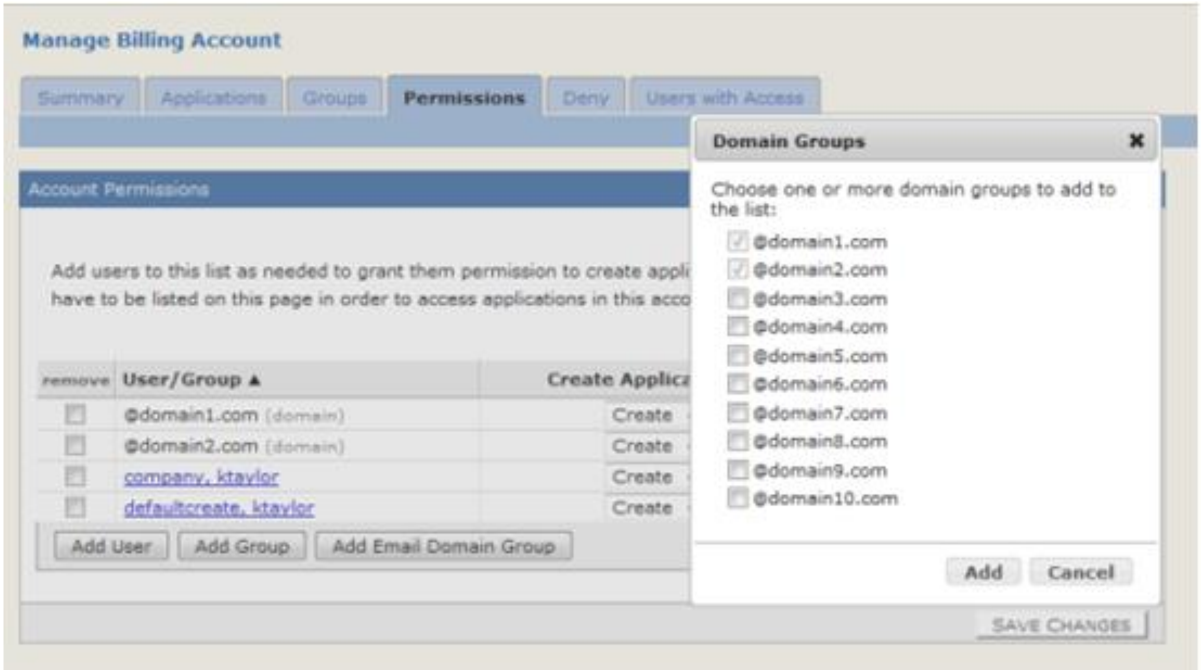
QuickBase displays choices as radio buttons on your form.



Give users in your company the ability to create QuickBase apps

You know you rely on your QuickBase apps –why not share the wealth? In the May release, Account Administrators can easily give users in their company the permission to create applications.

Administrators can click the new **Add Email Domains** button on the Permissions tab to see a list of email domains registered for their company. Administrators can choose one or several of these domains to grant all QuickBase users within those domains the ability to create applications.



Use Any/All in more places

When we introduced the ability to create reports using Any and All, this feature was available in the Report Builder only. In the May release, we've added this ability to filtering in Advanced Find, Email Notifications, and Email reminders.

Filter long lists of account or realm users

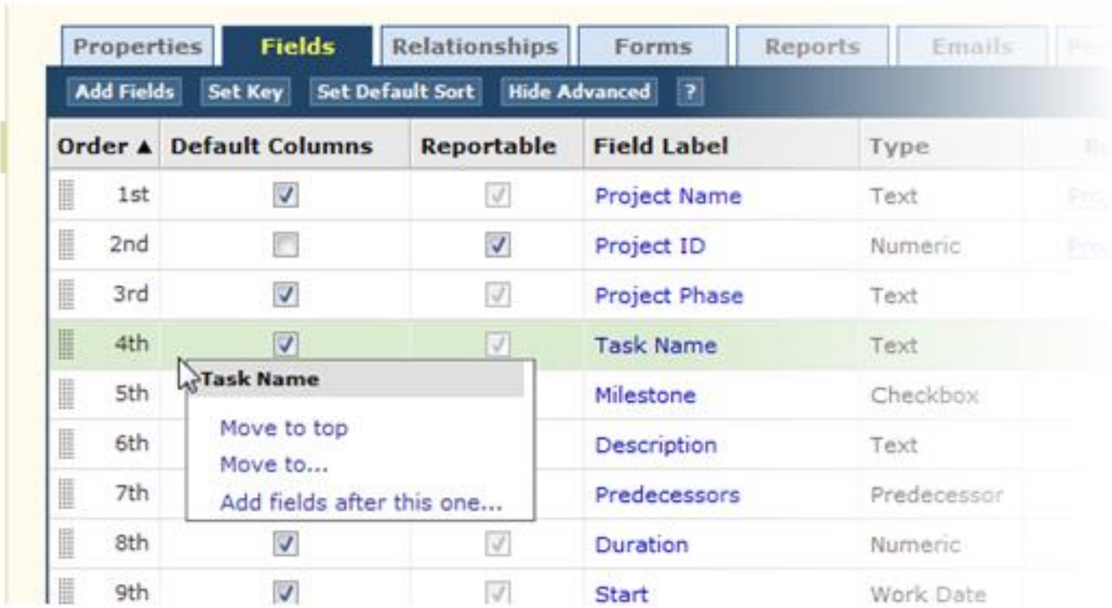
QuickBase now gives Account and Realm Administrators the option of filtering lists of users, so they can see just the subset of users they want.

Account Administrators can filter the **Users with Access** tab to see a list of specific users (using email addresses), users within the company (if you are part of a company), or users who have a particular status. Realm Administrators can filter the **Realm Directory** tab in much the same way. They can specify a list of email addresses to see specific users, or filter the list to see users with a particular access level. When you have a large number of users, you will see the pre-filter page first when you open the **Users with Access** tab or the **Realm Directory** tab. For all accounts, you can access the pre-filter page from a link on the **Users with Access** tab or the **Realm Directory** tab.

Reorder fields more easily

In February, we released a feature that let you drag and drop fields from one position to another in the field list. The feature missed the mark for some customers who had difficulty managing very long lists of fields.

In this release, you'll see that we've addressed issues with moving fields in long lists. You can now drag and drop fields across pages of fields. In addition, you can move or add a field to a specific location using the menu that appears when you right-click a field (shown below).



You'll also notice that the line number appears in the Order column, regardless of how you've sorted the list.

What's fixed in QuickBase?

We're continuing to focus on quality and have fixed a number of bugs in this release. (As always, all QuickBase releases include bug fixes from previous releases.)

- Email notification issues
- General issues

Email notification issues

Issue	Description
QBE003291	When you clicked the [Add a New Xxxdetailsrecord] link in Email Notification, "QuickBase Error" "Yyymasterrecord Not Found" displayed after the details record was added.
QBE003586	If you set "Notify When" to Add or Modify and the form contained an editable grid, you received two notifications (instead of one) when the record was added or modified. This issue has been resolved.

QBE003962	Custom email notification messages always included an iCal file as an attachment if the data form contained an iCal field, even if the custom email message did not make any reference to the iCal field. This issue has been resolved.
QBE004066	Email notifications sent when records were added did not include embedded report records. This issue has been resolved.
QBE005143	Email notifications included links instead of buttons for formula URL fields configured to display as buttons. This issue has been resolved.
QBE005234	Personal email notifications could not include a copy of a record unless the user had administrator rights on the table. This issue has been resolved.
QBE005300	The user did not receive email notifications for an application if the user did not have access to the trigger field. This issue has been resolved.
QBE005303	An email notification for when a record is modified did not display a user field in red. This issue has been resolved.
QBE005314	An email notification for when a record is modified contained two statements that a file attachment field had been changed to <file name> when a file was added to an existing record for the first time. This issue has been resolved.

General issues

Issue	**Description**
QBE005157	When displaying a record, if you tried to share the application, you may have received a message that "the time limit on the last page expired. You must submit the page within 60 minutes of when it is first displayed" even if you had been using the page for less than 60 minutes. This issue has been resolved.
QBE005193	In the Report Builder, if you displayed a report that filters on Numeric-Currency field, then clicked Customize this Report, the value you entered in the currency filter disappeared. This issue has been resolved.

QBE005206	When you created a Summary report using Internet Explorer and tried to insert a row grouping using a Date field AFTER an existing row grouping that used a non-date field, the Combine drop down did not display Date options; instead, the dropdown displayed the options for the preceding row grouping. This issue has been resolved.
QBE005238	Summary fields that contained “is during the current day” filters did not reflect the account’s timezone. This issue has been resolved.
QBE005240	In Internet Explorer, you were not able to delete an empty set of filter criteria. This issue has been resolved.
QBE005279	When you attempted to create a summary field to summarize only records where a date field occurred during the current month, the actual date range did not match the current calendar month. This issue has been resolved.
QBE005282	In Report Builder, if you created a filter using the Is During operator and specified either Fiscal Quarter or Fiscal Year, the dates displayed after the line of filter criteria did not correctly represent the fiscal year setting. This issue has been resolved.
QBE005286	When you create a new role, the application-level permission defaults to “None”. This issue has been resolved; the default is now "Basic Access".

July 2011 Release Notes [[return to top]]

In our July release, we added two major features to QuickBase: copy master and detail records, and import from Microsoft Excel (2007 and later) files.

- What's new in QuickBase?
- What's fixed in QuickBase?

Do you have an idea for improving QuickBase? You can share your suggestions by either clicking the orange **feedback** tab on the My QuickBase page, or visiting the Customer Feedback for Intuit QuickBase page (http://quickbase.uservoice.com).

What's new in QuickBase?

The July release introduces these new features:

- Copy master and detail records with their relationships
- Import Microsoft Excel (2007 and later) files

Copy master and detail records with their relationships

There is a new QuickBase feature and a new API call to copy or import records while maintaining dependencies. Using these features, you can either:

- Copy records using the Copy Master and Detail Records option
- Copy records using the QuickBase API

Copy records using the Copy Master and Detail Records option

Use the Copy Master and Detail Records feature to add a Formula - URL field that displays as a button in a specified table. Configure the button either to:

- **Copy a master record and its detail records.** For example, add a copy button in a project management application so that users can create a new Project by copying an existing Project master record and its detail Task records.

- **Import specific detail records to a master record.** For example, add an import button so that users can import the same group of detail Task records to different Project master records.

The Copy Master and Detail Records feature is available from the Customize > Application > Misc. tab and the Help > Application Site Map > Miscellaneous section.

Copy records using the QuickBase API

This release also includes a new API call (API_CopyMasterDetail) that can copy a master record with its detail records, or import only the detail records from one master record into a different master record. You invoke this call on a table-level dbid for the master table to which you are copying or importing records.

Import Microsoft Excel (2007 and later) files

You can now import Microsoft Excel (2007 and later) files directly into QuickBase, without having to first convert the Excel file to .csv.

Import Excel files to:

- Create new applications
- Update existing applications
- Import users
- Provision users into groups

If you created the file in a version prior to Microsoft Excel 2007, you still must save the file as .csv before importing to QuickBase.

What's fixed in QuickBase?

We're continuing to focus on quality and have fixed a number of bugs in this release. (As always, all QuickBase releases include bug fixes from previous releases.)

Issue	Description
QBE003157	Using Grid Edit on a report with records assigned to more than one user sometimes caused notification emails with a link to a blank report to be sent to some of those users. This issue has been resolved.
QBE005058	Values from Numeric-Currency and Numeric-Percent field types in child records did not copy correctly when using the Copy wizard. We recommend using the new Copy Master and Detail Record functionality available in this release.
QBE005108	The email sent to application administrators when the daily email notification limit for a table was exceeded did not clearly explain how QuickBase determines the limit. The email message has been improved and now provides more detailed information and links to help the administrator correct the problem.
QBE005318	Emails sent to application administrators about notification limits included the count of unverified users for accounts that were not permitted to send external emails to unverified users. This issue has been resolved.
QBE005319	When calculating the number of email notifications that could be sent per day, QuickBase also counted emails to unverified users, even when the account was not permitted to send email to unverified users. This issue has been resolved.

QBE005362	User caching on large accounts was causing the Deny List and Realm Directory pages to “hang” the first time they were accessed after a server restart. This issue has been resolved.
QBE005366	When multiple records were edited and the notifications were supposed to be sent to everyone in a List-User field, notifications for the first record went to the full user list, but for every record after that, the notification was only sent to only a single user from that field. This issue has been resolved.
QBE005394	If you chose to Create New Field when importing a file, there was no entry in the field type list for the Date/Time field type. This issue has been resolved.
QBE005407	Attempting to log in to QuickBase from quickbase.intuit.com using Firefox 5 redirected the user back to that page. This issue has been resolved.

August 2011 Release Notes [return to top]

In our August release, we have added several features to QuickBase. See the sections below for further information.

- What's New in QuickBase?
- What's Fixed in QuickBase?

Do you have an idea for improving QuickBase? You can share your suggestions by either clicking the orange **feedback** tab on the My QuickBase page, or visiting the Customer Feedback for Intuit QuickBase forum (http://quickbase.uservoice.com).

What's New in QuickBase?

The August release introduces these new features:

- Easily Test Roles in Your Application
- Filter the Deny List
- New Password Requirements

Easily Test Roles in Your Application

We've made it easier for application managers and users with "Full Administration" or "Basic Access with Sharing" permission to test how users in different roles interact with applications.

You can quickly change your role by selecting **Test role as >** ***Role*** from the **Signed in as** menu.

When you temporarily change your role, you see only what users in that role will see within your application, including: the dashboard page, the list of available reports, and the records and fields they can view and modify. A message appears at the top of the screen indicating what role you are using. This message also contains a link that you click to return to your former role.

Filter the Deny List

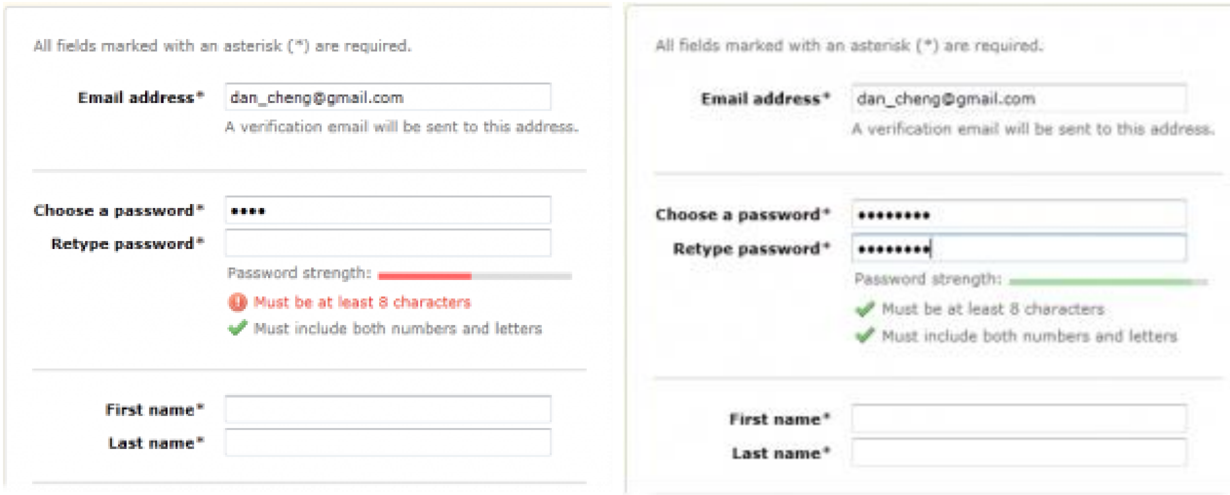
QuickBase now gives Account Administrators the option of filtering users in the Deny list to see just the subset of users they want. On the **Deny** tab, which has been updated for this release, you can search for specific denied users by first name, last name, screen name, or email address. Also, you can filter the list by status (and by company membership if your company and associated email domains have been registered with QuickBase).

If you have a large number of denied users, a pre-filter page appears first when you open the **Deny** tab on the **Manage Billing Account** page. You also can access the pre-filter page from the **Customize this list** link on the **Deny** tab. On the pre-filter page, you can choose to filter the Deny list based on:

- A list of specific users (paste in a list of email addresses)
- All users with a particular status
- Only those users who belong (or who do not belong) to your company, if your company and associated email domains have been registered with QuickBase.
- All users. (Note that, depending on how many users you are trying to display, you may experience some performance issues.)

New Password Requirements

We've increased the requirements for passwords used to access QuickBase, both on www.quickbase.com and on realms where users log in using QuickBase authentication. **No existing passwords will be affected**, but when you reset your password, or register for QuickBase, you'll be required to choose a password 8-20 characters long that contains both numeric and non-numeric characters. We've also improved the interface to show the requirements and the strength of the password you choose.



This feature is part of our efforts to continually improve QuickBase security.

What's Fixed in QuickBase?

We're continuing to focus on quality and have fixed a number of bugs in this release. (As always, all QuickBase releases include bug fixes from previous releases.)

Improved Handling of Numeric-Percent Fields

The August 2011 release improved QuickBase's handling of Numeric-Percent fields, especially during import and round-trip of percentage values. Issues QBE002161, QBE003728, and QBE005423 were fixed as part of this effort. See the table below for details.

Issue	Description
QBE000426	For two tables in a cross-application relationship, the **<Add a new --record-->** prompt did not appear in drop-downs on the 'detail' side of the relationship (that is, there was no way to add a master record from the details table). Now, if a user has explicit add permissions in the master table, they will be able to add master records from a detail record.
QBE001405	When the user tried to delete a form used by a notification, the error message that displayed said nothing about the notification. This issue has been resolved.
QBE002161	The Numeric - Percent field type treated the default value inconsistently when adding records via different methods. Now, all methods of adding a record store the default value divided by 100.
QBE003728	Grouping by percent fields in a report did not display percent values the same way that the Numeric - Percent field did. This issue has been resolved.
QBE004007	If you had a reference field on a form and had chosen to base the record picker for that field on a report with custom sorting, the choices for that field did not honor the report's sort order. This issue has been resolved.
QBE004295	If you unchecked "Allow users who are not administrators to export data", Summary reports still showed an option to export the report to a spreadsheet for non-administrator users. This issue has been resolved.

QBE005376	Form rules referencing the 'current date' obtained the current date from the PC clock, not from server time, which had the potential to affect data integrity. This issue has been resolved.
QBE005382	QuickBase Alert emails sent to application managers contained an invalid link to the alert. This issue has been resolved.
QBE005392	The list of resources included in the online help included a link to an older version of the community forum. This issue has been resolved.
QBE005405	The *QuickBase API Guide* listed the incorrect value for the duration of an authentication ticket. The correct duration is 12 hours. This issue has been resolved.
QBE005414	Editing a multiple-choice summary field containing more than 500 items caused a JavaScript error. This issue has been resolved.
QBE005417	The Copy Master and Details functionality would return an incorrect count of records created in some cases. This issue has been resolved.
QBE005423	API_DoQuery and API_AddRecord treated percentages differently, resulting in difficulties using the two calls to "round-trip" data. API_DoQuery now has an optional parameter called "returnpercentage" that allows the developer to specify how percentages will be treated.
QBE005442	(Introduced in July 2011 release) Email notifications that triggered on conditions containing User and Formula - User fields did not work when the filter was the user's email address. This issue has been resolved.
QBE005443	(Introduced in July 2011 release) When a table had a reminder set up, and one of the recipients no longer had any permission to access the table, some email subscriptions and reminders for that table were not sent. This issue has been resolved.

September 2011 Release Notes [return to top]

In our September release, we have added several features to QuickBase. See the sections below for further information.

- What's New in QuickBase?
- What's Fixed in QuickBase?

Do you have an idea for improving QuickBase? You can share your suggestions by either clicking the orange **feedback** tab on the My QuickBase page, or visiting the Customer Feedback for Intuit QuickBase forum (http://quickbase.uservoice.com).

What's New in QuickBase?

The September release introduces these new features:

- New password requirements
- New security question requirement
- QuickBase now displays 14 decimal places by default
- Documentation improvements

New password requirements

We've strengthened the requirements for passwords used to access QuickBase, both on www.quickbase.com and on realms where users log in using QuickBase authentication. As a result, you'll be required to choose a password 8-20 characters long that contains both numeric and non-numeric characters, if your password doesn't already comply with those requirements. We've also improved the interface to show the requirements and the strength of the password you choose.

New security question requirement

We now require all users (on www.quickbase.com and on realms where users log in using QuickBase authentication) to set a security question and answer. This information is used as part of the password reset process, to verify your identity.

These features are part of our efforts to continually improve QuickBase security.

When you access QuickBase after the **September 2011** release, you will see a message at the top of the screen, asking you to update your security credentials by March 12, 2012. If you click the link in the message and perform the requested update, the message will no longer appear.

When you update your security credentials, if your password does not meet our new requirements, you will be prompted to change it. Also, if you do not have a security question set, you will be prompted to set one.

After March 12, 2012, if you have not performed the update, you will be required to do so. Also, if you use the "Keep me signed in…" functionality, and you have not signed in between the September 2011 release and March 12, 2012, you will be automatically signed out and asked to sign back in as part of the update.

1. **What are the new password requirements?** Passwords must be 8-20 characters, and must contain both numeric and non-numeric characters. If you are in a realm other than www.quickbase.com, your realm administrator may also have set other restrictions.
2. **Who will be affected?** Everyone who logs in using QuickBase authentication.
3. **My company has a single sign-on system. If I log in using my corporate username and password, will I be affected?** No. The new security requirements do not apply to users who log in to QuickBase using their corporate single sign-on system.
4. **What if I have access to more than one realm, will I be required to update multiple passwords?** Note:www.quickbase.com is a realm.
   If your password in more than one realm does not comply with the new requirements, you will be required to update each of those passwords separately.
5. **Can I proactively change my password(s) before the September 2011 release so that my work is not disrupted?** Yes, but for the smoothest user experience you will also need to log out before the September 2011 release, and log back in afterward.
6. **If some of my scripts rely on a user account with a password that does not comply with the new requirements, will my scripts stop working?** For the September 2011 release, no. Accounts used for scripting only (no interaction with the browser) will eventually be required to comply with the password requirements as well. For the smoothest transition, we strongly encourage you to log in interactively, change your password to comply with the new requirements, and update your scripts to use the new password *before* you are required to.
7. **If I stay logged in through the "Keep me signed in" option and have forgotten my password, how will I be able to update my password?** You will need to contact Customer Support to reset your password between now and March 12, 2012.
8. **What is the security question?** We're now asking each user to set a security question (essentially, a question about yourself) and answer it. If you ever need to reset your password, we'll ask you for the answer to this question. The answer helps us verify that it's actually you, and not someone trying to compromise your account.
9. **What if I have access to more than one realm, will I be required to create more than one security question/answer?** Note: www.quickbase.com is a realm.
   No; each user will have only one security question.

QuickBase now displays 14 digits by default for decimal numbers

For numbers with decimal places, QuickBase now displays up to 14 digits in total if you do not specify a value in a Numeric field's Decimal Places setting, and is consistent with the API_DoQuery API call. You can still override this default behavior by specifying a number of decimal places to display.

Documentation improvements

For the September release, we improved our reporting documentation by adding a new "Common Reporting Needs" topic to the online help. This topic describes how to create reports that meet common needs, such as reporting on data in multiple tables, reporting on projects and workflow, and creating reports that summarize data for specified time intervals.

We also improved the formatting of the QuickBase HTTP API Guide to reduce the PDF page count.

What's Fixed in QuickBase?

We're continuing to focus on quality and have fixed a number of bugs in this release. (As always, all QuickBase releases include bug fixes from previous releases.)

Issue	**Description**
QBE001970	A conflict resolution message appeared when you save Grid Edit changes. This issue has been resolved.
QBE005125	In detail table reports that ask users to select a value from a lookup field, the lookup field did not contain values from the master table. This issue has been resolved.
QBE005421	If the application owner no longer has permission for a table that triggers an email notification, the notification showed the current user as the owner of the application. This issue has been resolved; the email notification contains a warning if the owner no longer has access to the table that triggered the notification.
QBE005445	Users on the Deny List for a billing account appeared in the user list in Address Book and User Picker for that account's applications. This issue has been resolved and denied users are no longer auto-suggested in the Address Book and User Picker.
QBE005472	If you have a form rule set up to trigger a change based on a predecessor field not being empty, the rule did not trigger in real time if you chose the predecessor by using the "Add Predecessors" button. This issue has been resolved.
QBE005479	A personal report showed up with a different owner. This issue has been resolved.

October 2011 Release Notes [[return to top](#)]

In our October release, we have added several features to QuickBase. See the sections below for further information.

- [What's New in QuickBase?](#)
- [What's Fixed in QuickBase?](#)

Do you have an idea for improving QuickBase? You can share your suggestions by either clicking the orange **feedback** tab on the My QuickBase page, or visiting the Customer Feedback for Intuit QuickBase forum (http://quickbase.uservoice.com).

What's New in QuickBase?

The October release introduces these new features:

- [File Attachment Management](#)
- [Partners & Add-ons Menu Option](#)

File Attachment Management

The Manage File Attachments page is used to manage all of an application's file attachments. Using this page, you can view the file size of each attachment, open individual files, and delete multiple attachments at once to stay within your service plan's space limits.

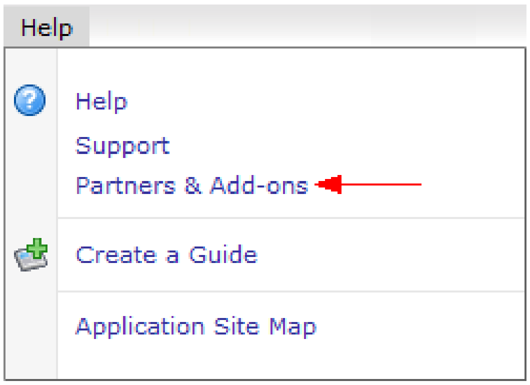
Note: You need the proper permissions in the application to view and delete file attachments. Please check with your application administrator if you find that you cannot access or delete file attachments.

You can access the Manage File Attachments page in one of two ways:

- From the **Customize** menu, choose **Applications**. On the Misc. tab, choose Manage File Attachments.
  OR
- From the **Help** menu, choose **Application Site Map**. Click Manage File Attachments under the Miscellaneous heading.

Partners & Add-ons Menu Option

The new **Partners & Add-ons** menu option is now available from within any QuickBase application. This option takes you directly to our Partners page, where you can search for QuickBase partners with the business and technical skills to help with QuickBase application development or integration with other systems.



What's Fixed in QuickBase?

We're continuing to focus on quality and have fixed a number of bugs in this release. (As always, all QuickBase releases include bug fixes from previous releases.)

Form Rules Issues

See the table below for fixed issues involving form rules:

Issue	Description
QBE004110	When creating a form rule based on a lookup of a multiple-choice field, the UI did not give you the set of valid choices from which to select. This issue has been resolved.
QBE004216	When using multiple-choice fields to create form rules, choices that contained apostrophes or double quotes could not be selected. This issue has been resolved.
QBE004223, QBE004781	In Chrome, the last rule in a list of form rules could not be selected. This issue has been resolved.
QBE004806	When creating a form rule using conditional drop-downs and a blank condition or action, the blank values were shown as *«blank»* on the rule. This issue has been resolved.

QBE005336	Clicking on a form rule when the field in that rule had been converted from Date/Time to Date set "the current date/time" value in the Action to <<blank>>. This issue has been resolved.

Chrome Issues

See the table below for fixed issues that affected QuickBase in the Chrome browser:

Issue	**Description**
QBE005349	When customizing tables, switching from a table's Properties, Relationships, Reports, or Emails tab to the Fields tab displayed the fields from the first table in the list on the left instead of those from the currently selected table. This issue has been resolved.
QBE005448	Columns overlapped when scrolling horizontally in a report. This issue has been resolved.
QBE005476, QBE004770	The record picker window did not always show the scroll bar used to scroll through records. This issue has been resolved.
QBE005499	Tooltips in the Application Site Map were formatted incorrectly. This issue has been resolved.

Other Issues

See the table below for other issues fixed for this release:

Issue	**Description**
QBE001409	In applications with many fields and relationships, choosing the <Other Column> option could cause slow response times. This issue has been resolved.
QBE002312	An Exact Form with two or more consecutive spaces in its name prevented the display of the list of Exact Forms in Word. This issue has been resolved.

QBE003263	Attempting to open some Exact Forms for editing in Word 2007+ caused an error. This issue has been resolved.
QBE004064	Opening the downloaded Exact Form template in Word caused a security warning due to an expired certificate. This issue has been resolved.
QBE005275	Using the <Other Column> option while building a report on the "child" side of a cross-app relationship caused the list of fields and related tables to be blank. This issue has been resolved.
QBE005485	When using **Test as <Role>** to test a role assigned to a target group, testing a different role cleared the target group from your original roles. This issue has been resolved.
QBE005492	Editing a record with cross-app relationships while testing a role could cause the user to be removed from their original role. This issue has been resolved.
QBE005498	The email notification sent for alerts contained a link that did not work for realms other thanwww.quickbase.com. This issue has been resolved.

December 2011 Release Notes [return to top]

In our December release, we have added several features specific to trial users to QuickBase. See the sections below for further information.

- What's New in QuickBase?
- What's Fixed in QuickBase?

Do you have an idea for improving QuickBase? You can share your suggestions by either clicking the orange **feedback** tab on the My QuickBase page, or visiting the Customer Feedback for Intuit QuickBase forum (http://quickbase.uservoice.com).

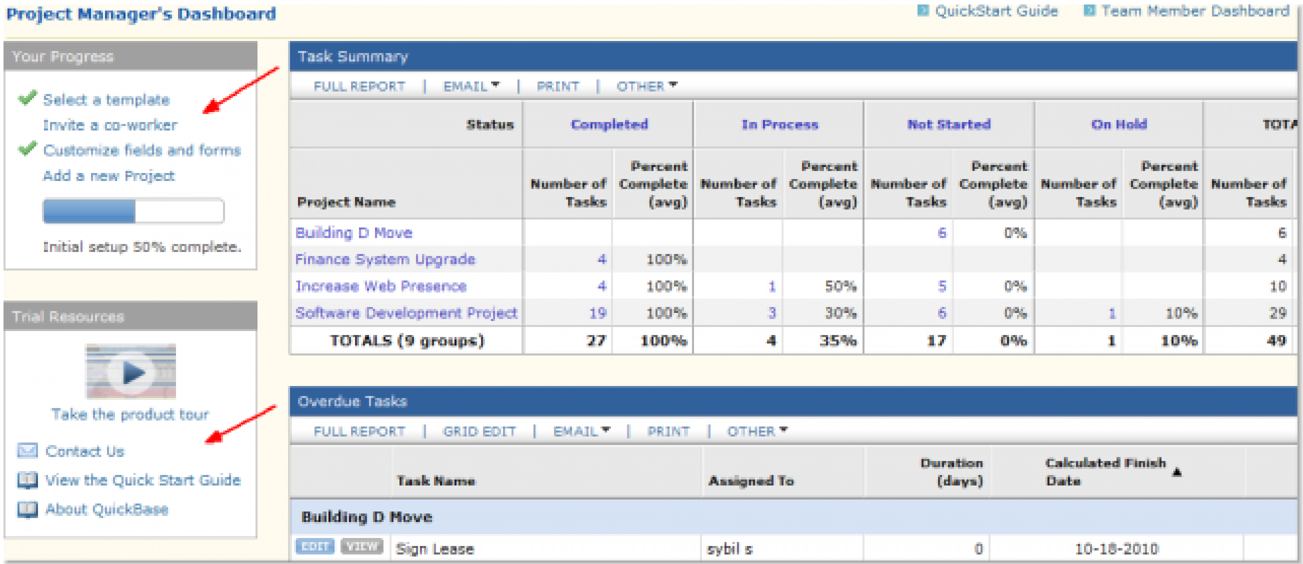
What's New in QuickBase?

The December release introduces the following new features:

- "Get Started" Display
- "What is..." Guides
- Hide "New" and "Updated" Flags

"Get Started" Display

Trial users who create an application after the December 2011 release will see two special panes on the left of the application dashboard. The Your Progress and Trial Resources panes contain links to guide trial users through creating an application and learning more about QuickBase.



Application developers can choose to display this content to non-trial users by customizing the application dashboard. (Note that the Your Progress pane will only display if the user has administrative permissions for the application.)

"What is..." Guides

Trial users who begin to customize roles, fields, relationships, forms, reports, or emails will see an expandable "What is..." panel that provides a quick explanation of these important QuickBase entities, as well as links to video and online help resources to learn more.

Hide New and Updated Flags

Application administrators now have the ability to hide flags for an application. If this has been done for an application you use, the NEW! and UPDT icons will not appear when records have changed, and the user-level menu options to clear New and Updated flags will not be shown.

Separately, any QuickBase user may choose to hide flags in all their applications, for themselves only. Flags are now hidden by default for new QuickBase users.

What's Fixed in QuickBase?

We're continuing to focus on quality and have fixed a number of bugs in this release. (As always, all QuickBase releases include bug fixes from previous releases.)

Issue	**Description**
QBE004467	On the Application Site Map, the Variables link (under Customize) was incorrect. This issue has been resolved.
QBE005514	The API_GetSchema and API_GetDBInfo API calls now include a **time_zone** response parameter that specifies the timezone that the application is in.
QBE005534	When creating a new application from a template with a List - User field, the field did not correctly pre-fill the user who created the application. This issue has been resolved.
QBE005568	Email notifications sent to a specific list of users in a field did not accept a List - User field as a valid user. This issue has been resolved, and you can now specify an Email, User, or List - User field in brackets [like this] as an email address to send notifications to.
QBE005571	(Introduced in the October 2011 release) In Chrome, calendar reports display the first day of each workweek in all gray. This issue has been resolved.
QBE005572	If a File Attachment field had a field name with certain special characters (such as "&" or "<"), the Manage File Attachments page could not display or manage information for the table with that field. This issue has been resolved.
QBE005582	In applications created from the Project Manager Plus template, the **Add Similar Project** button caused an error due to a missing application token. This issue has been resolved.

QBE005601	The **usersandroles** request parameter for API_CloneDatabase did not appear in the API documentation. This issue has been resolved.