



Hub Training Materials

QuickBase Basics

Version 1.1

About This Training

DC PCSB uses a custom QuickBase application called The Hub to facilitate data collection and reporting. The purpose of this training is to show how to perform basic operations common to all QuickBase applications.

Objectives

After completing this lesson, you will be able to:

- Sign in to the Hub
- Change your password
- Navigate the ribbon
- Set up personal notifications

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Signing Into the Hub

Browse to the sign in page (<http://www.dcpcsb.quickbase.com>) and follow the instructions outlined here: https://www.quickbase.com/user-assistance/signing_in.html



The image shows a sign-in form with the following elements:

- Label: "Email Address" above a text input field.
- Text: "or user name" below the first input field.
- Label: "Password" above a second text input field.
- Text: "I forgot my password" below the password field.
- Button: A green "Sign in" button to the right of the password field.
- Text: "Keep me signed in on this computer" with an unchecked checkbox to its left.
- Text: "Not a QuickBase user? Create a log-in." at the bottom of the form.

Changing Your Password

If you have forgotten or would like to change your password, please see instructions here: https://www.quickbase.com/user-assistance/forgot_your_password.html

Navigating the Ribbon

For details on the layout of the ribbon at the top of the Hub, please see instructions here:

http://www.quickbase.com/user-assistance/about_quickbase_navigation.html

Setting up Personal Notifications

Notifications are emails that are sent when a specific action is taken on a record. To set up notifications for yourself, please follow the below steps:

1. Log in to the Hub
2. In the upper right hand side of the page you will see your name in a gray rectangular box, similar to this:

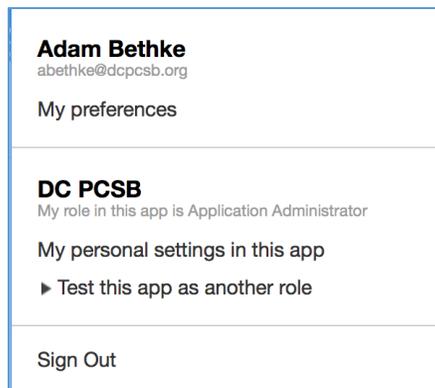


Or if your browser window is not wide enough, you may only see this:

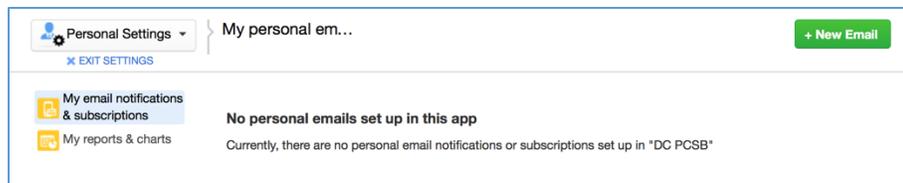


In either case, click the white downward pointing arrow

3. The following menu will appear:

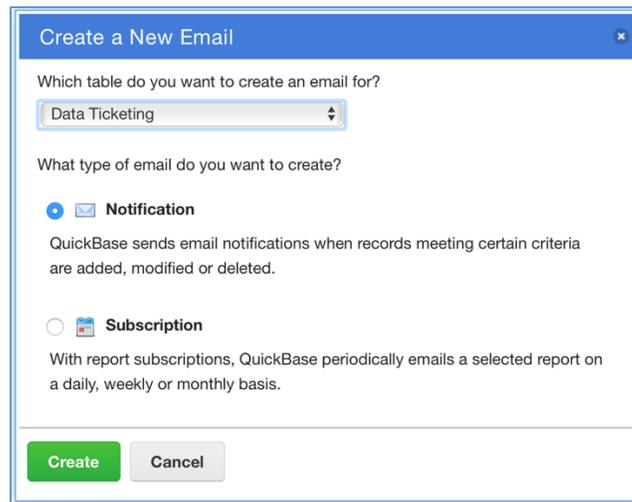


4. Click the '**My personal settings in this app**' link
5. You will be taken to the **Personal Settings** page, which will look something like this:



6. Click the green **+ New Email** button at the top right of the page

7. The following window will appear:

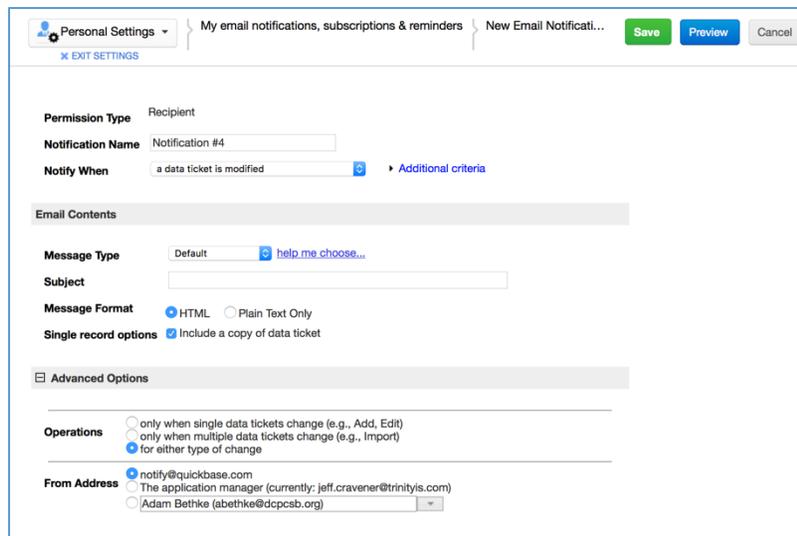


8. Choose the table you wish to create a notification for

9. Be sure that the **Notification** option is selected

10. Click the green **Create** button

11. You will then be taken to a page similar to this:



12. Give your notification a meaningful name in the **Notification Name** field

13. Follow the instructions beginning at step 5 on this link to set up the Notification: https://www.quickbase.com/user-assistance/creating_a_notification.html