

 quickbase

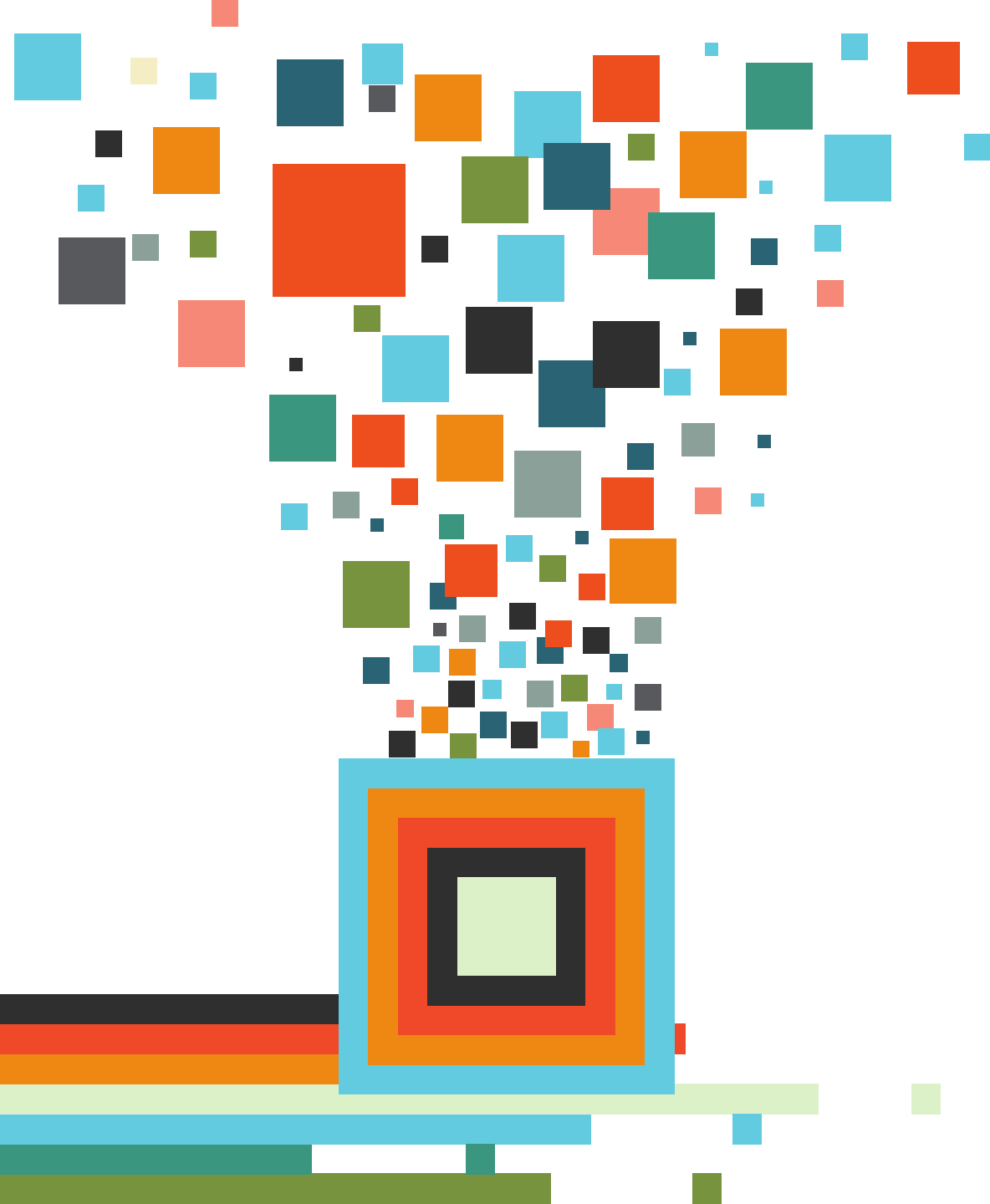
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**AGC**

THE CONSTRUCTION  
ASSOCIATION

# Gray Work Solutions Workshop



# Introductions



- Pittsburgh, PA
- 8 years as a customer at Lighthouse Electric
- 15+ years using Quickbase

**Robert Salaj**

Customer Advisory Director



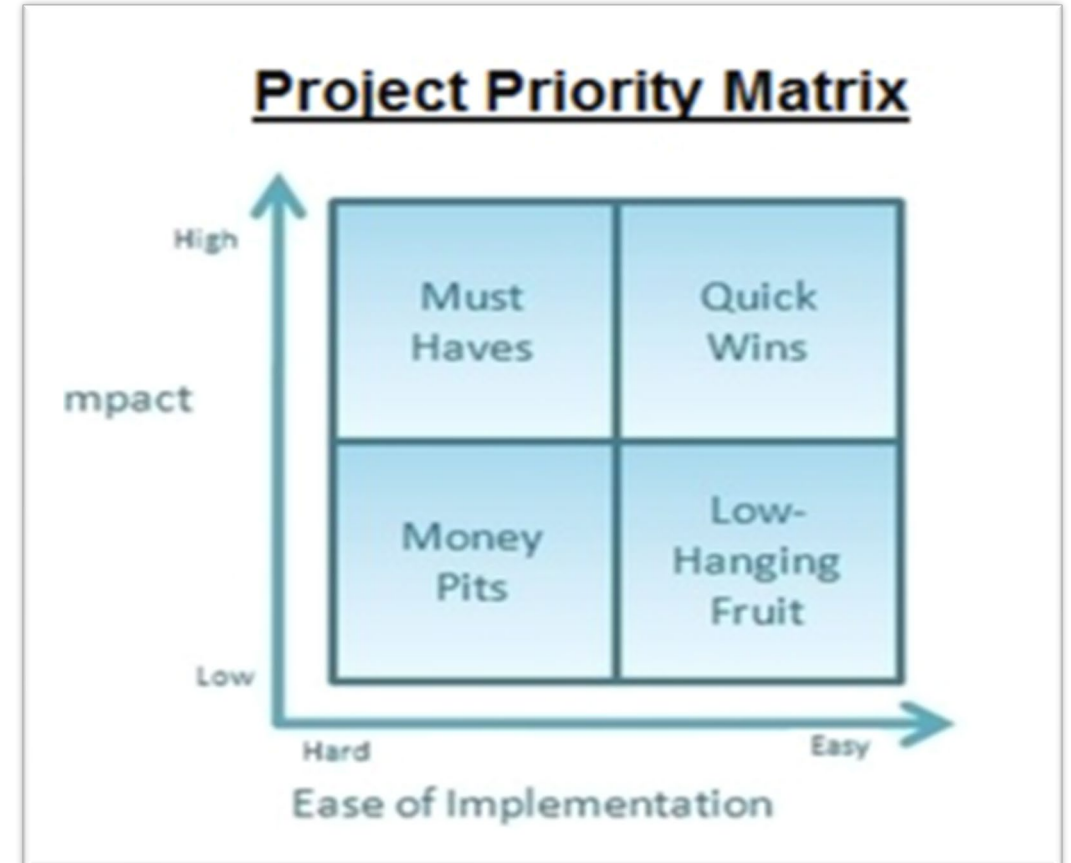
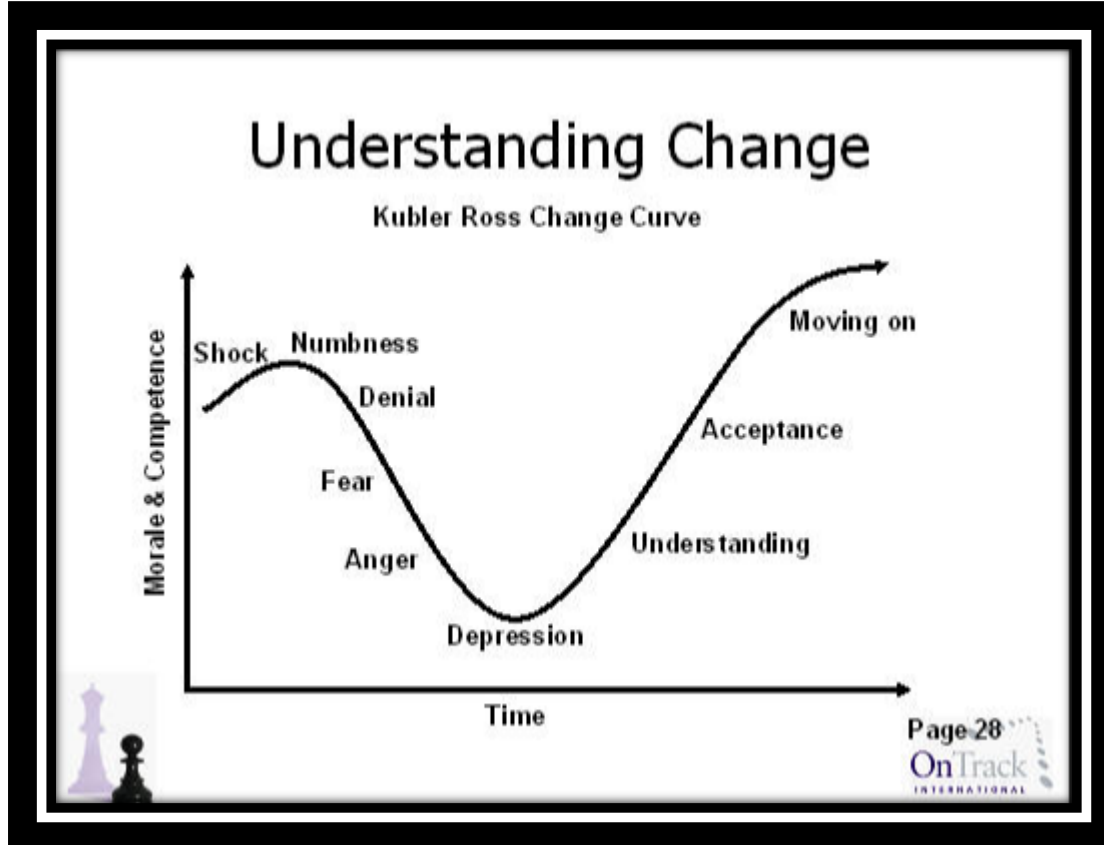
- Boston, MA
- 8 years at Quickbase
- Another relevant bullet

**Freddie Sabbs**

Director, PreSales

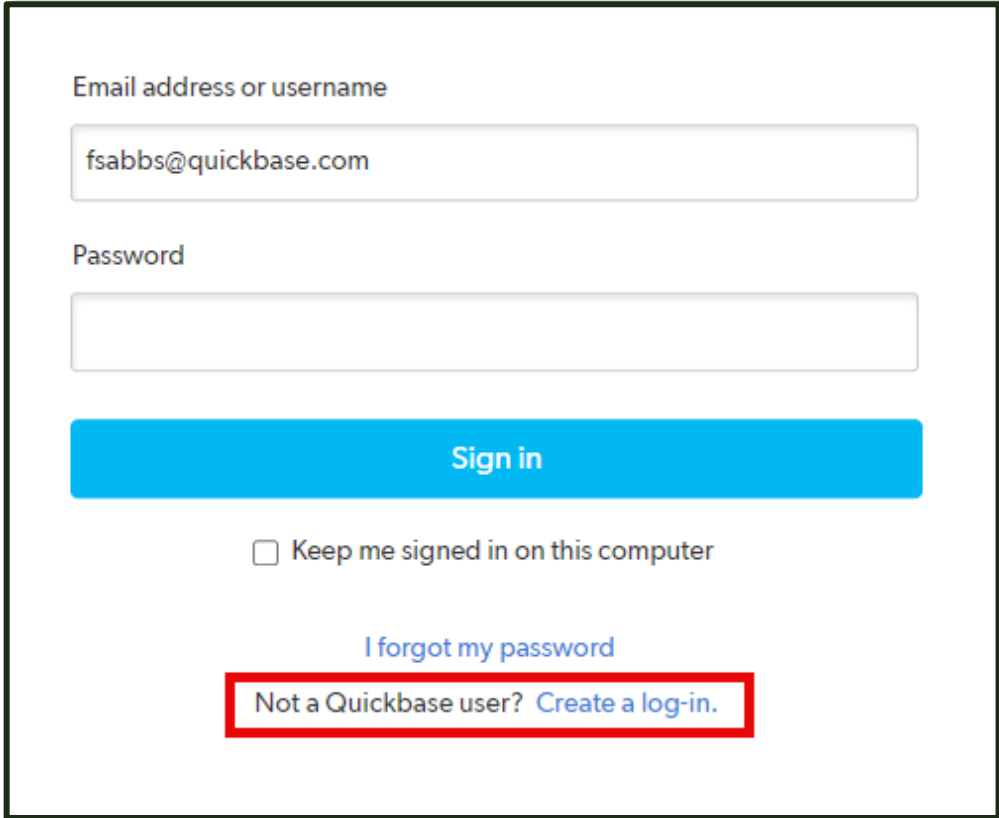
# Operational Excellence

## Internal Project Identification and Classification Exercise



# Log into Quickbase

- Go to **www.agc.quickbase.com**
- Click **“Create a log-in”**
- Enter the email you used to register for this event
- You will be prompted to create a password

A screenshot of the Quickbase login interface. It features a white background with a black border. At the top, the text "Email address or username" is followed by a text input field containing "fsabbs@quickbase.com". Below this, the text "Password" is followed by an empty text input field. A large blue button with the text "Sign in" is positioned below the password field. Underneath the button is a checkbox labeled "Keep me signed in on this computer". Further down, there is a blue link that says "I forgot my password". At the bottom, a red rectangular box highlights the text "Not a Quickbase user? Create a log-in.", where "Create a log-in." is a blue link.

Email address or username

fsabbs@quickbase.com

Password

Sign in

☐ Keep me signed in on this computer

[I forgot my password](#)

Not a Quickbase user? [Create a log-in.](#)

# Agenda

Introduction

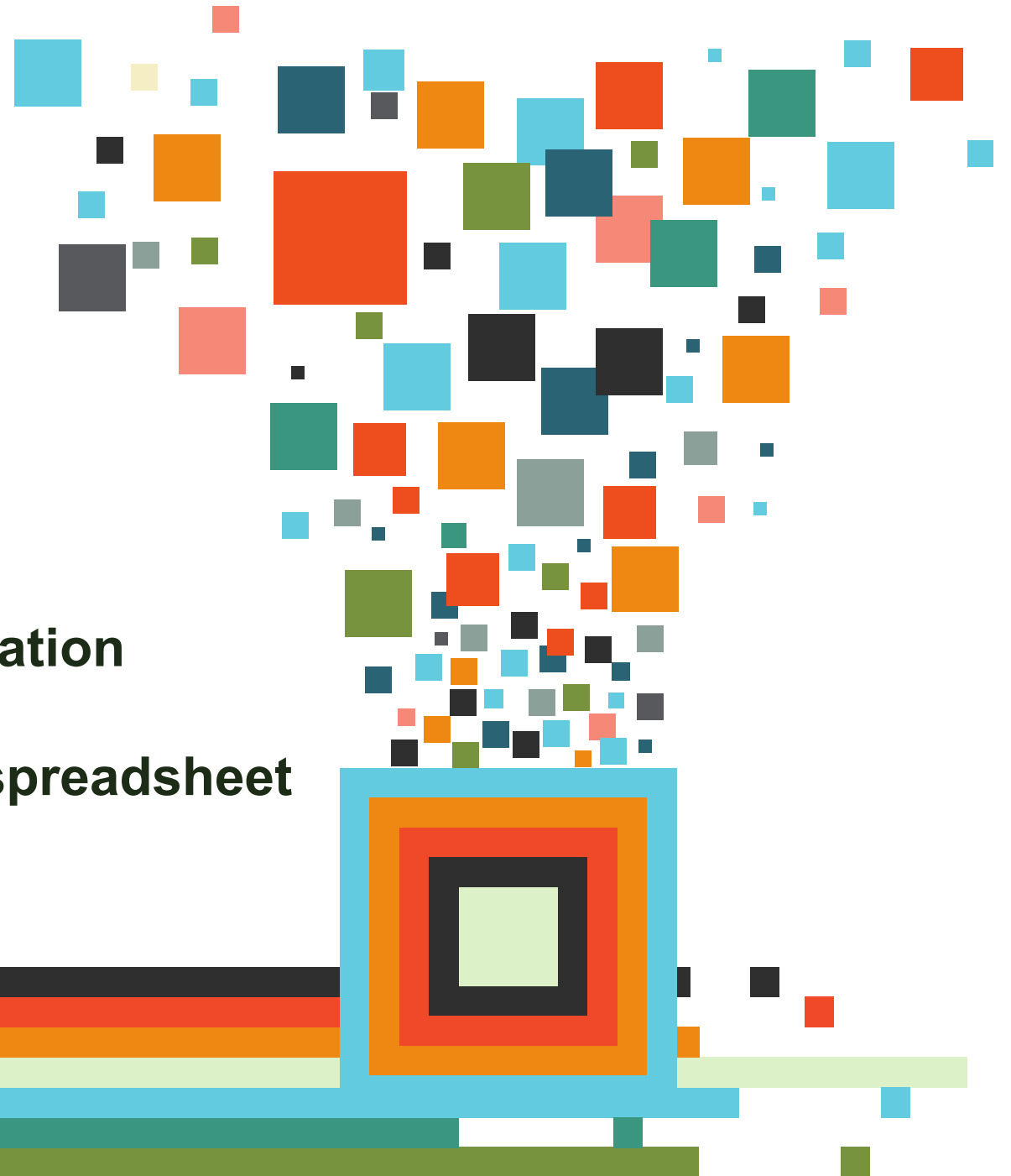
Welcome to Quickbase

What We'll Build Together

**Session 1: Modify a Template Application**

**Session 2: Create a new app from a spreadsheet**

Wrap Up!



# What you'll walk away with today

- An understanding of how Low Code/No Code Software can fit into your overall Company Strategy for Streamlining Processes
- The advantages of tailoring software to meet YOUR process
- The basics around what is Quickbase and how to create an application
- An understanding of what a Data Model is and how to create one from a spreadsheet or data set.
- The advantages and mechanisms for bringing your Data to life with reports, dashboards, notifications and Integrations.





**We help organizations  
see, connect, and control  
the complex projects  
that reshape our world.**







# Consigli Construction improve Project Delivery and Profitability with Quickbase

## Challenge

- Managed various projects using many disconnected point solutions causing inconsistent data, inability to see project progress, and ability to identify issues quickly.

## Solution

- Built a customized flexible solution to track all their projects that can be easily accessed by role-based users, including their customers.
- Track all aspects of project phases from design, pre-con, purchasing, resources, staffing, change orders, safety, budget & cost management, closeout and lessons learned.

## Benefit

- Decreased operational costs by eliminated siloed point solutions.
- Significantly improved their delivery of projects on time, within budget, and customer satisfaction.



# How we do it

## Automation

Streamline and optimize business processes



## Integrations

Unify data from multiple sources to get greater clarity



## Builder

Create custom apps for complex projects



Application Platform for  
**Dynamic Work Management**

## Insights

Share role-based insights for informed decision-making



## Admin

Manage users and apps with confidence



## Mobile

Access information and manage workflows on the go



# Some of the most innovative companies use Quickbase to deliver their complex projects



# Jacobs



# What we'll build together:

- Exercise One: Modify a template app
- Exercise Two: create an app from a spreadsheet

# Build Workshop

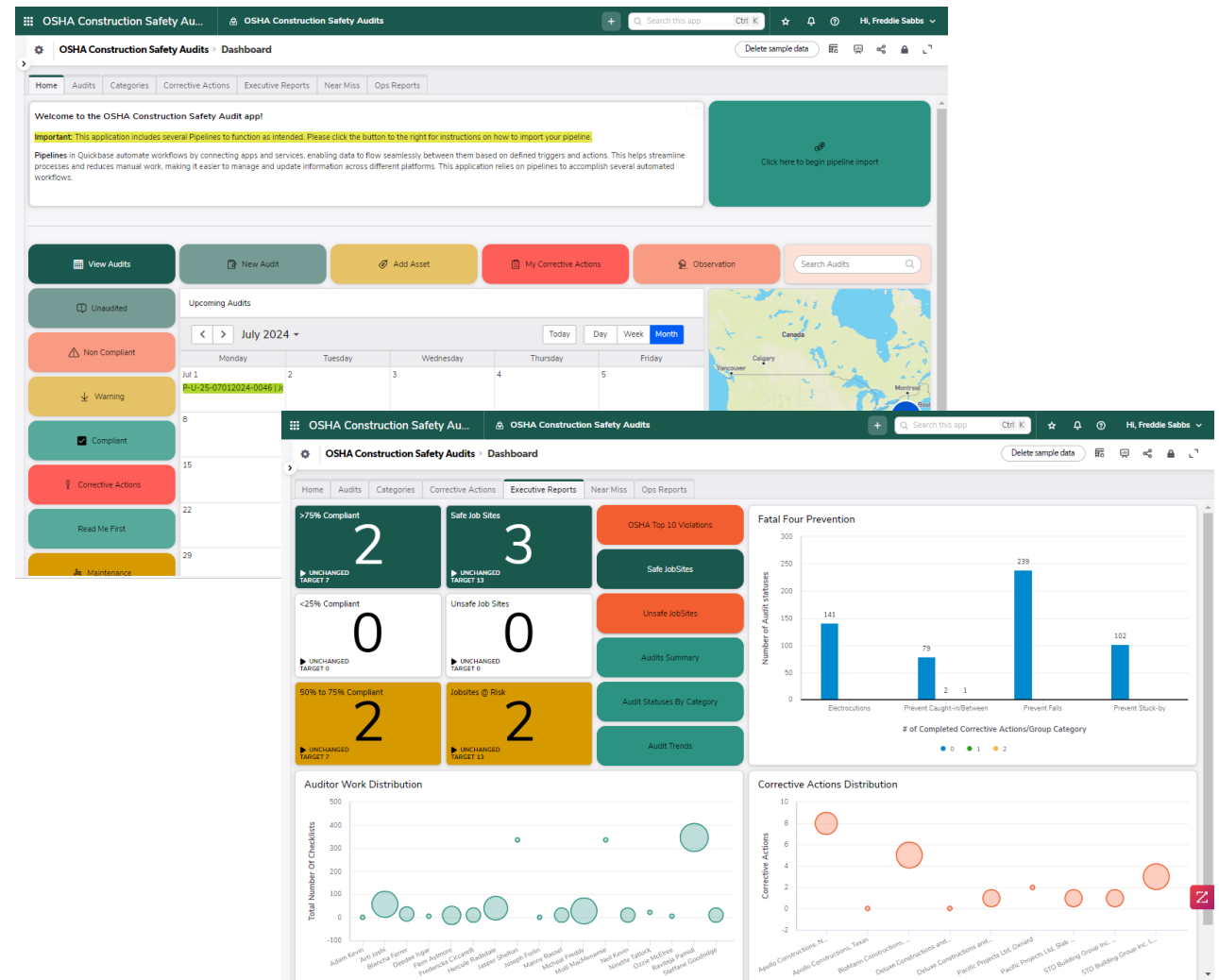
**Exercise #1:**  
Customize a Pre-built Solution App

**OSHA Safety Audits**



# Customize the OSHA Safety Audits Application

- Install the **OSHA Safety Audits** application from the Exchange
- Edit fields to **capture relevant information** for your team(s)
- Add a custom notification to **create a unique workflow**
- **Simplify** the app for users by updating user roles & permissions
- Leverage AI to generate new insights



# LET'S DIVE IN!

Log into [agc.quickbase.com](https://agc.quickbase.com)

# Break



# Build Workshop

## Exercise #2:

Create an app from a spreadsheet  
(Subcontractor Database)



# Case Study: Subcontractor Database

## Situation:

We currently have a spreadsheet of all subcontractors and which projects they worked on

## Problem:

Subs say "you never send us work"

We aren't tracking satisfaction w/ subs

Some subs and PMs don't work well together

## Solution:

Create an application that tracks which subs have been used on which jobs

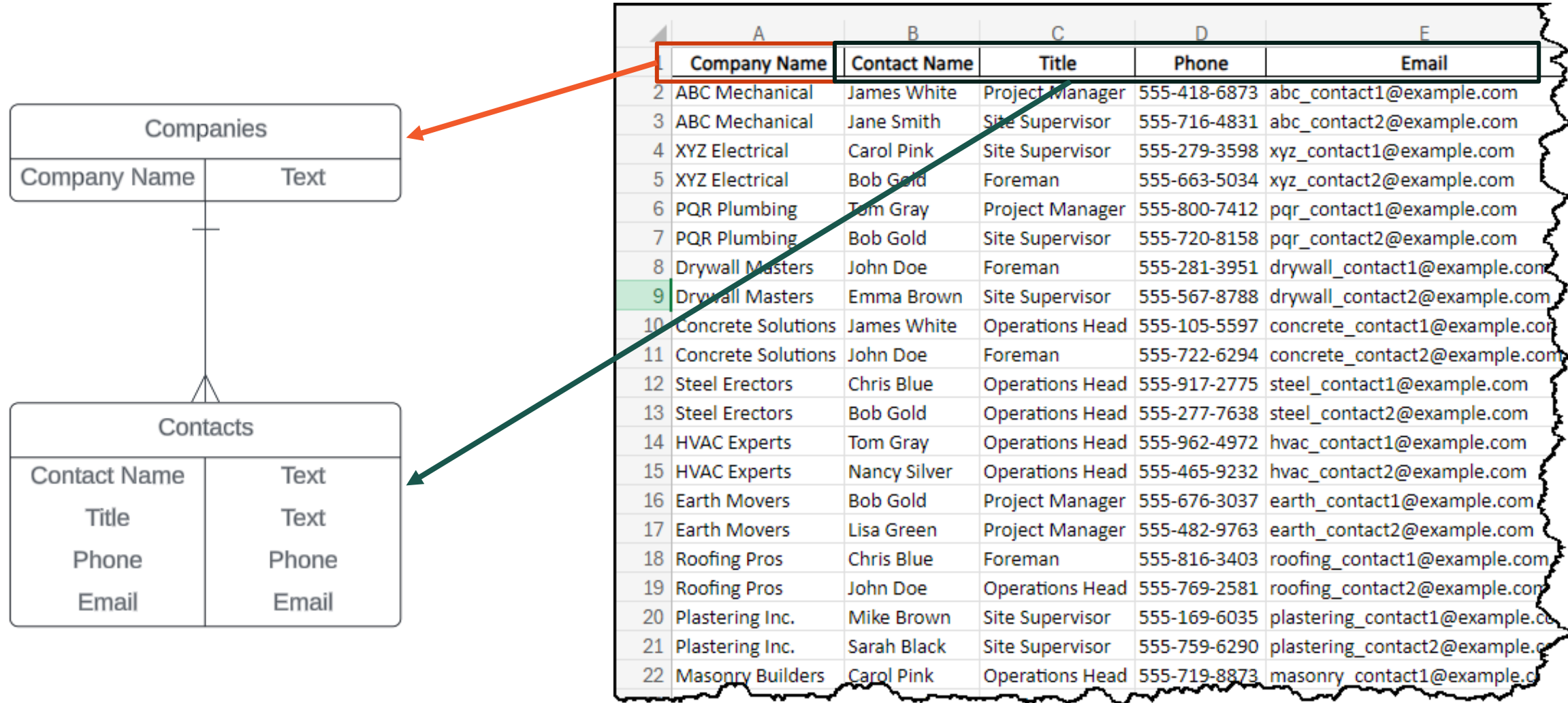
Create a database of Subcontractors with rankings

Notify Safety that a new Sub has been added

Keep track of all Active Subcontractors and their contacts

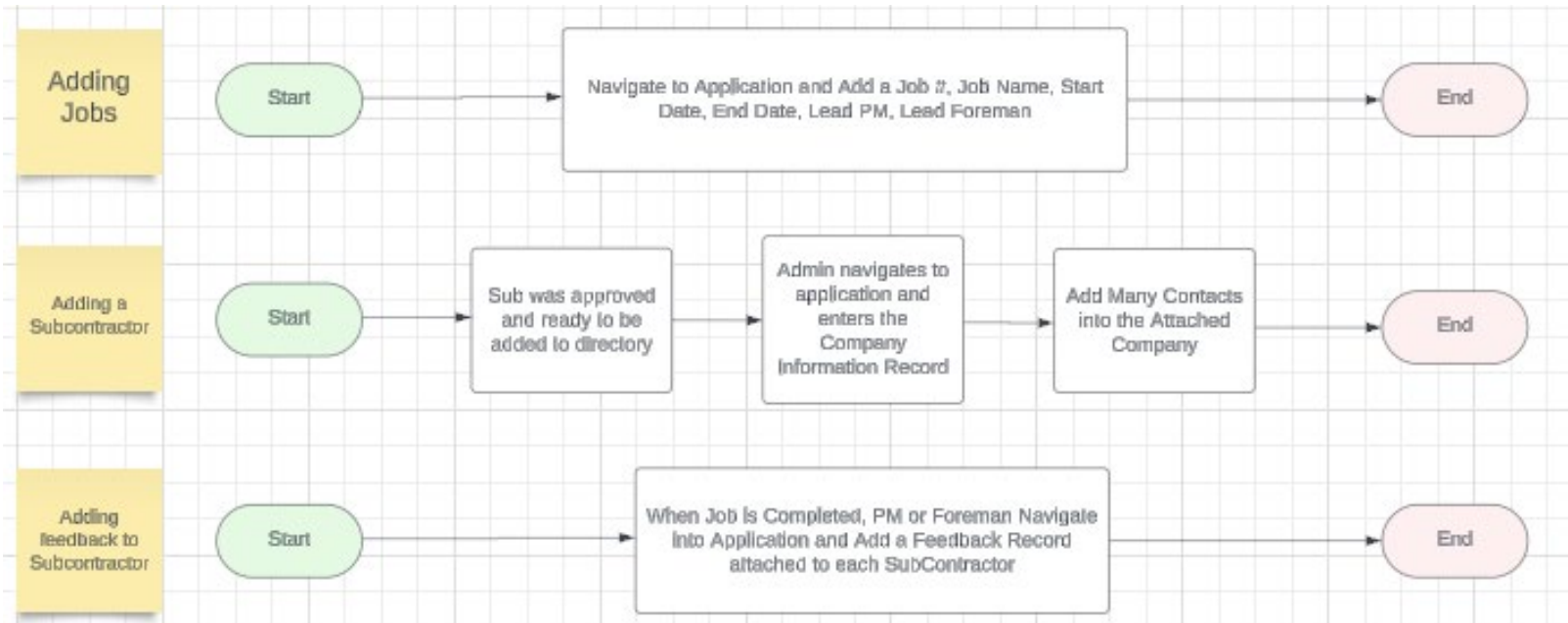
# What is a Datamodel

## From Flat File to a Database



# In your tables:

- Review the Process Map Provided
- Develop your corresponding Data model
- Identify Important Fields to Capture
- Identify key Reports, Notifications, and Roles



Deliverable 1:  
Datamodel

Deliverable 2:  
Fields

Deliverable 3:  
Roles

Deliverable 4:  
Reports

Deliverable 5:  
Notifications

# Our MVP Deliverables?

Add data model

What roles

Reports

Key Fields



# Develop your MVP Application

Each person must make the MVP, but is allow to customize and tailor the application to suit once the MVP is completed

## **MVP Details:**

- Subcontractor Database that tracks Companies and Contacts for each company
- Process includes adding a new Subcontractor and notifying safety
- A main report on the dashboard should include an Active Subcontractor List
- A dashboard for Project Management to see the catalog of Subcontractors

# Menti

## How would you leverage an application for subcontractor management?

- What data would you track?
- What reports would you build for better insights?
- What additional data would you collect from your team? From the subs themselves?
- What would you automate?



# Exercise

Process Map, Draw your data model  
and Identify key fields, reports  
and Notifications

# LET'S DIVE IN!

Log into [agc.quickbase.com](https://agc.quickbase.com)

