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Preparing for Upgrade to the New QuickBase

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What is the upgrade Process?

I manage one or more apps. What do I need to do?

I manage an account/realm. What do I need to do?

What can I expect after I Upgrade?

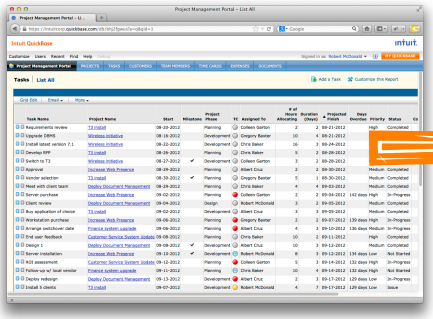
How will the Upgrade affect my apps?

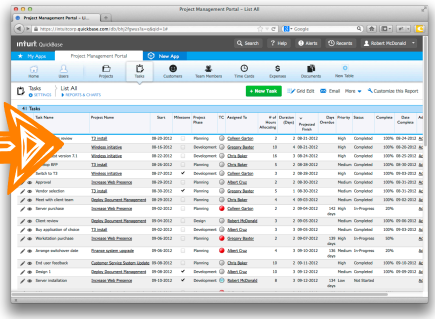
The New QuickBase Upgrade

Account URL

https://www.quickbase.com/db/bhj2fgwus?a=q&qi...

https://acmecorp.quickbase.com/db/bhj2fgwus?a=q&qi...





New Streamlined UI

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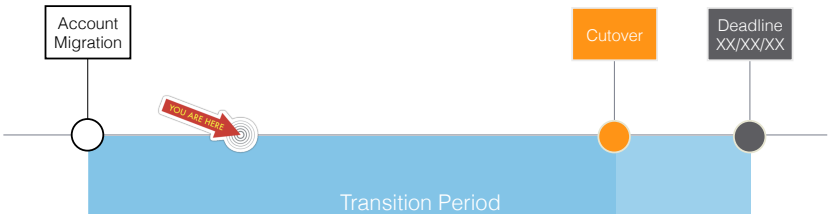
Timeline



During Transition Period
- Initially, only application managers and account/realm admins are exposed the new QuickBase
- App managers may share access to the new QuickBase by forwarding the Account URL or through in-product invite mechanism
- Links in automated emails, i.e. notifications, subscriptions and reminders, continue to refer back to www subdomain until final cutover
- API calls may be made through www.quickbase.com and/or your new Account URL
- Application or data changes made through either UI affect the live app schema and/or data

After Cutover
- New QuickBase UI by default for all users accessing applications owned by your Account
- Sign-ins at www.quickbase.com are automatically redirected to new Account URL
- All API access to your applications through www.quickbase.com will be blocked

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PRODUCT EXPERIENCE

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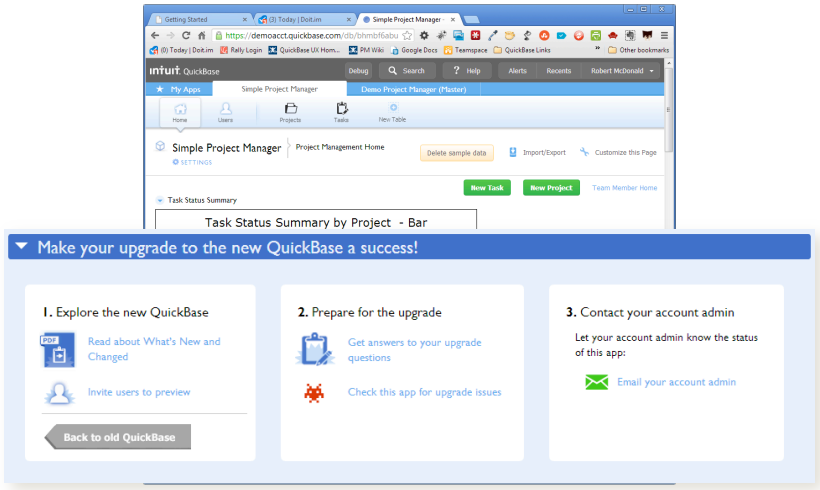
Transition Experience



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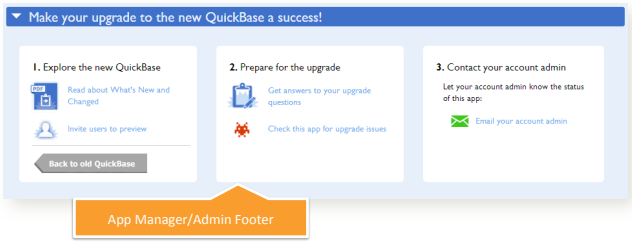
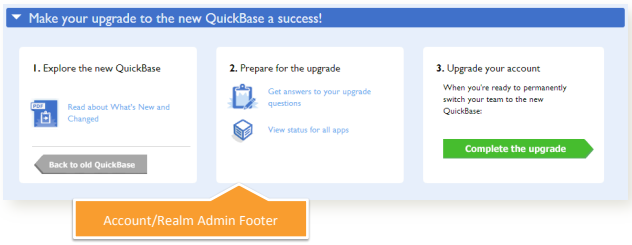
Role-specific Footers





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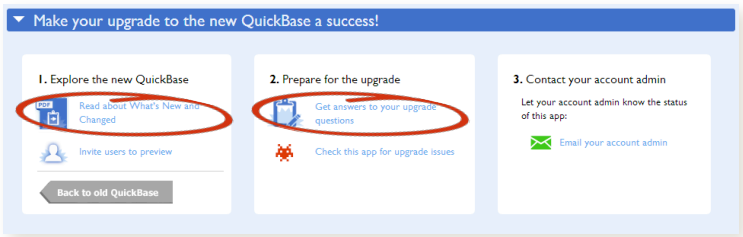
Upgrade Resources



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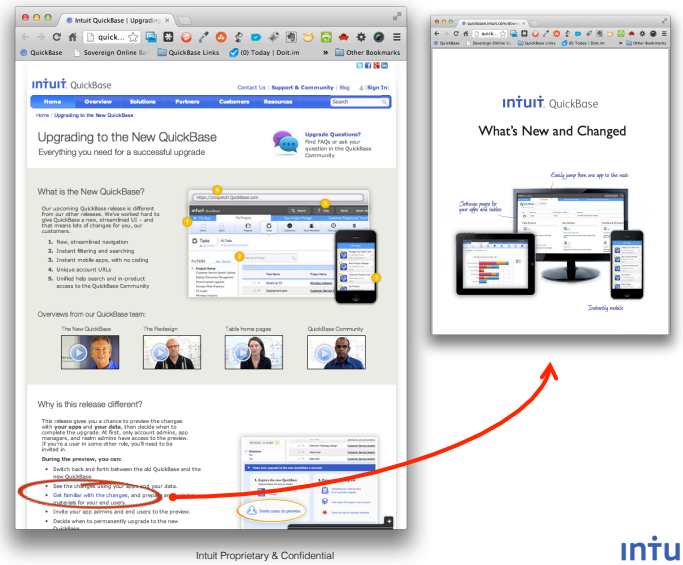
Upgrade Resources



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PREPARING YOUR APPS FOR YOUR NEW ACCOUNT URL

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The QuickBase API

Two possible ways to make API requests

- An XML request string POSTed to QuickBase

```
POST https://<TARGET DOMAIN>/db/<TARGET_DBID>
Content-Type: application/xml
Content-Length:
QUICKBASE-ACTION:API_AddField
<qdbapi>
        <label>label</label>
        <type>type</type>
        <ticket>ticket</ticket>
        <apptoken>app token</apptoken>
        <udata>whatever</udata> <!--optional pass-thru data -->
</qdbapi>
```

- As a URL sent in a GET request, e.g. sent from a browser, embedded in a web page, etc.

```
https://<TARGET DOMAIN>/db/<TARGET_DBID>?a=API_AddField&label=label&...
```

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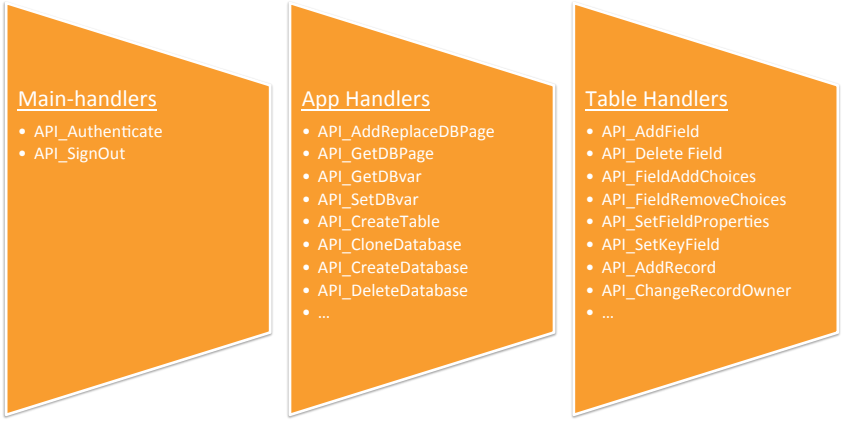
API Requests Fall Into 3 Categories

Categories based on the TARGET_DBID of request



TARGET_DBID = db/main

TARGET_DBID = AppId, Ex. *db/bhsaqwwpr*

TARGET_DBID = TableId Ex. *db/bhsaqwwqa*

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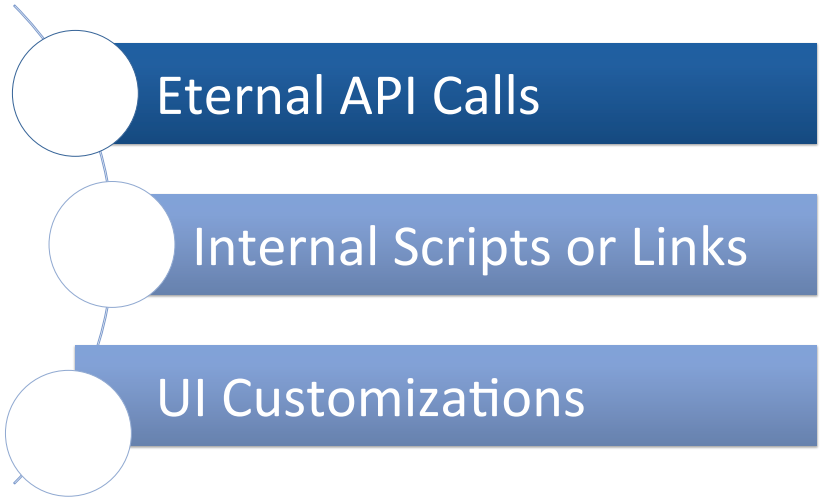
Customizations Impacted by Account URL



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API Calls from External Sources

- Common sources include web forms, server-side scripts, 3rd-party applications, etc.
- External scripts must be updated to:
  - Authenticate against your new Account URL
  - Direct API requests to your new Account URL
- If your scripts include a hard-coded ticket, you must update your script with a new ticket generated against your Account URL
- 2 ways to update API calls for new Account URL
  - Change the <TARGET_DOMAIN> of each request to Account URL
  - Pass <realmhost>Account URL</realmhost> parameter with each request

Changes to external scripts can/should be updated during the transition period, and **must** be completed prior to cutover

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Changing TARGET_DOMAIN through SDKs

SDK	
Java	QuickBaseClient qc = new QuickBaseClient("testuser@intuit.com","password", “acmecorp.quickbase.com”);
Javascript	var qdb = new QuickBaseClient("acmecorp.quickbase.com");
Perl	$qdb = HTTP::QuickBase->new('https://acmecorp.quickbase.com/db');
VB	Dim QDB As QuickBaseClient.QuickBaseClient QDB = New QuickBaseClient.QuickBaseClient QDB.setServer("acmecorp.quickbase.com",True)
PHP	QuickBase(uname,pwd,usexml,db,apptoken,realm,hours) QuickBase(testuser@intuit.com,password,true,"", "","acmecorp",10)

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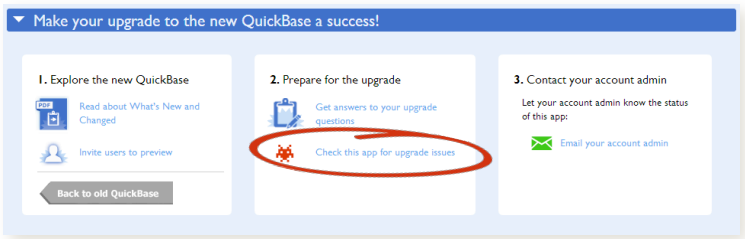
App Troubleshooting Tools



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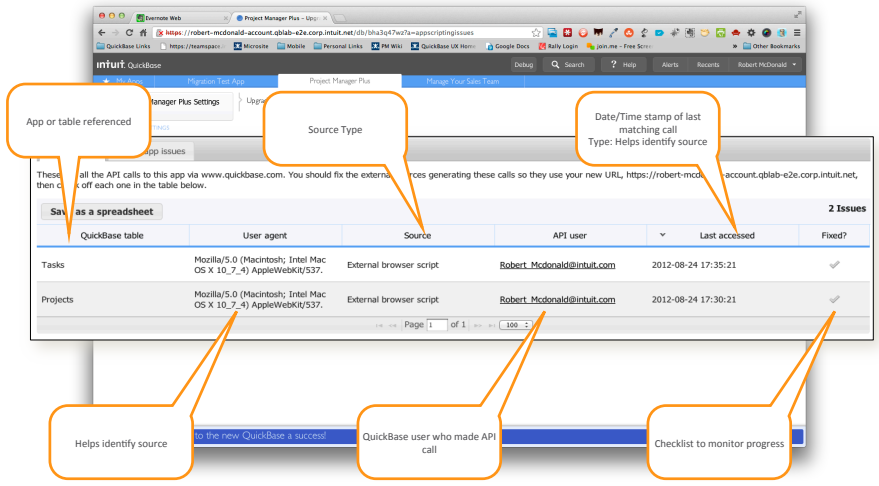
Identifying API Calls from External Sources



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Processing External Script Issues

- Note the Last Accessed date/time
- Identify source of external script using user agent/ source columns
- Update script to redirect API calls to new Account URL
- Initiate new API call through external script
- Verify Last Accessed date/time to confirm success (Note: 15 min lag)
- Click the checkmark in the appropriate row(s) to update application status rollup

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In-app Scripts and Links

Usually found in dashboard, dbPages, URL fields

- APIs or links where the <TARGET_DBID> equals main are called main handler. Examples include:
  - API_Authenticate, API_GrantedDbs, API_CreateDatabase
  - https://www.quickbase.com/db/main?a=myqb
- In-app scripts and links with absolute links to main handlers, i.e. www.quickbase.com/db/main?... must be modified to make the links relative. For example:
  - https://www.quickbase.com/db/main?a=myqb becomes /db/main?a=myqb
- Most other browser-based calls will automatically be redirected after the cutover. Examples include:
  - Browser bookmarks
  - HTML links to APIs or pages where <TARGET_DBID> is not equal to main, such as API_Addrecord, API_GenResultsTable, etc.

Absolute links to main handlers can/should be updated during the transition period, and **must** be completed prior to cutover

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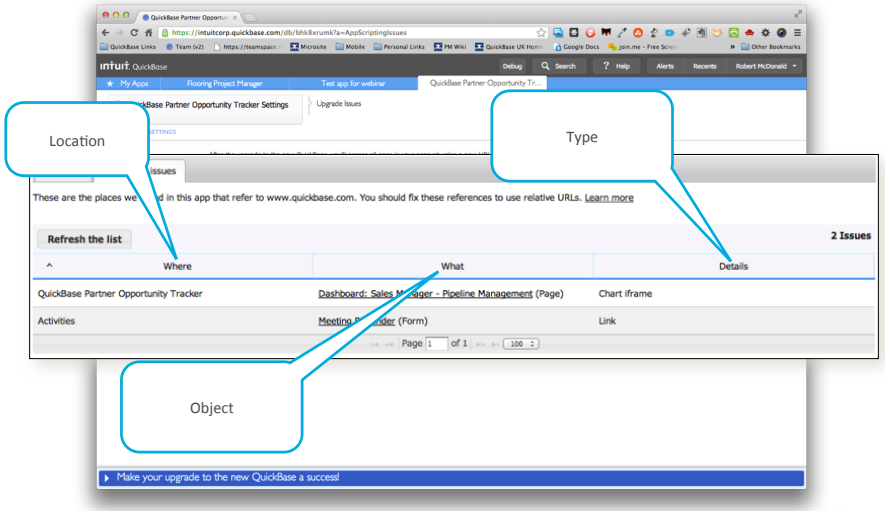
Identifying In-App Scripts or Links



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HTML Link in App Custom Header

Link to main handler URL in an HTML hyperlink

```
<a href="https://www.quickbase.com/db/main?a=myqb">My QuickBase</a>
```

Make the URL relative by removing https:// www.quickbase.com from the href attribute.

```
<a href="/db/main?a=myqb">My QuickBase</a>
```

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Absolute links in Formulas

Absolute reference to main handler in a Formula field or a custom column in a report.

```
"https://www.quickbase.com/db/main" & "?act=API_Authenticate"
```

Replace https://www.quickbase.com with the URLRoot() formula function.

```
URLRoot() & "db/main" & "?act=API_Authenticate"
```

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Absolute Links in Scripts

Absolute URL in HTML script in a code page, or in a text section of a dashboard (app Home page).

```
function getApps() {
$.ajax({
    "type": "POST",
    "contentType": "text/xml",
    "url":"https://www.quickbase.com/db/main?a=API_GrantedDBs"});
return false;
```

Make the URL relative by removing https://www.quickbase.com

```
function getApps() {
$.ajax({
    "type": "POST",
    "contentType": "text/xml",
    "url":"/db/main?a=API_GrantedDBs"});
return false;}
```

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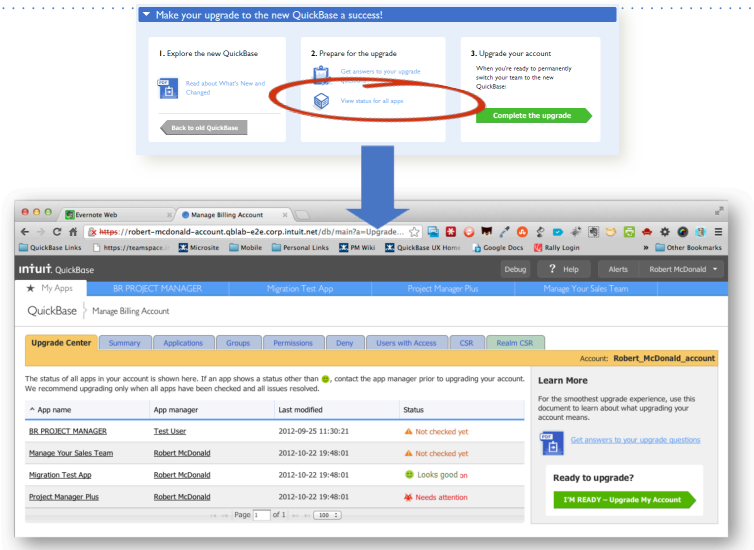
Account-Level Rollup



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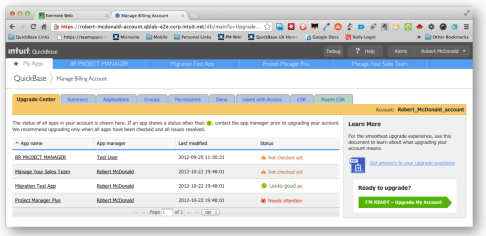
Application Status



Status	Description
Looks good	External and In-App Tools have been run and no issues have been found
Needs attention	One or more scripting issues have been found by External and/ or In-App Tools
Not checked yet	No External script issues have been found but In-App tool has not been run yet

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Next Actions

- Optimize your applications for the new QuickBase
- Determine whether you have any applications with potentially breaking changes
- If necessary, update and test your applications and scripts prior to cutover
- Cutover to the new QuickBase prior to the deadline
- If you have any issues during the process, please submit a support case at quickbase.intuit.com/support/portal

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QUESTIONS

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