Path to 2022 Certification

university

Introduction

- **Certification goal:** Verify current product knowledge of Quickbase Builders including best practices and process standardizations

- **Customer benefits**

  - Certified builders build more successful apps.

  - Customers can also use the certification to promote or hire Quickbase Builders and to assign work

- **Builder benefit:** Certification demonstrates that they have the skills to build more successful apps

- **2 levels of certification:** Builder and Expert

The exams

- **The App Builder Exam**

  - A 75-minute, 60-question multiple choice exam for builders who can build apps for themselves and roll-out apps to end users

- **The Expert Builder Exam**

  - A 75-minute, 60-question multiple choice exam for advanced builders who work with APIs, Webhooks, and Advanced Formulas

  - You need an App Builder Certification to qualify for this exam

- **The Combined Exam**

  - A150-minute, 120-question exam for advanced builders who want to earn their Expert Builder Certification in one step

- **The Pipelines Builder Exam**

  - A 75-minute, 60-question multiple choice exam for builders who can design, build, and maintain data integrations using Pipelines

  - You need an App Builder Certification to qualify for this exam

App Builder exam topics

App Planning (20%)

- Gathering user requirements
- Planning your app
- Diagraming your app
- Implementing your app
- Documenting your app

App Building (60%)

- Working with relationships
- Managing forms and reports
- Managing roles and permissions
- Setting up email: notifications, reminders, and subscriptions
- Working with formulas

App Management (15%)

- Customizing your app's appearance
- Sharing an app
- Analyzing an app
- Designing for performance

Data Integration (5%)

- Importing data from a spreadsheet
- Adding and updating records through imports
- Moving data between Quickbase apps
- Integrating data from outside sources
- Using sync

Expert Builder exam topics

Working with Advanced Formulas (20%)

- Creating formulas
- Troubleshooting formulas
- Formula buttons

Data Integration (60%)

- Creating and modifying APIs
- Troubleshooting APIs
- Creating and modifying webhooks
- Troubleshooting webhooks

App Management (15%)

- Managing an app
- Monitoring and optimizing performance
- Snapshotting
- Archiving

Pipelines Builder exam topics

Pipelines Concepts and Design (6%)

- Explain pipeline concepts

- Plan your pipeline

Pipeline Building and Editing (42%)

- Perform basic tasks

- Edit a pipeline

- Use conditions

- Limit returned records

- Link and fetch records

- Work with files and attachments

Data Transformation (12%)

- Transform data using jinja

Quickbase Channel (12%)

- Create records

- Delete records

- Import records

- Update records

Included Channels (5%)

- Use the Bucket Channel

Pipeline Administration and Management (8%)

- Activate and connect to channels

Pipeline Best Practices, Testing, and Troubleshooting (15%)

- Build for efficiency

- Test a pipeline

- Troubleshoot a pipeline

Recommended before certification

- Develop your hands-on skills in Quickbase for 4-6 months by building apps

- Complete the related eLearning content

  - Look for Learning Paths to orient yourself

- View the recorded Certification Prep course in the 2019 Empower series. This covers topics many candidates find most difficult.

- Attend live training events that focus on specific topics, especially our new intermediate-level courses

- Review the resources Quickbase Community and Quickbase Online Help

- For additional information please reach out to us: university@quickbase.com

Path to App certification weeks 1-2

ALL EXAMS					
	Course #	Content	Description	# of Lessons	Duration (HH:MM:SS)
Week 1		Quickbase University	Familiarize yourself with the catalog and content on Quickbase University, in addition to the recommended content below.		

App Planning- ALL EXAMS					
	Course #	Content	Description	# of Lessons	Duration (HH:MM:SS)
Week 1	B03	Planning Your App	The process of building a custom Quickbase app is a project and like any other project, you must plan ahead to be successful. Projects that fail usually fail because of a lack of planning. Defining the who, what, how, and why of your app will help you get buy-in and act as a guidepost during development.	8	0:25:37
Week 1	B04	Mapping Your Business Process	This course walks you through an example of mapping a business. However, you can apply these recommendations to any process.	5	0:12:09
Week 2	B05	Modeling Your App	This course walks you through the steps of creating your data model using your data, your process map, and your requirements gathering.	4	0:17:02
Week 2	AP04	Documenting Your App	This course shows you how to document your app using a documents table as well as internal documentation features at the app, table, and field level.	7	0:13:00

Path to App Certification weeks 3-7

	Course #	Content	Description	# of Lessons	Duration (HH:MM:SS)
ALL EXAMS					
Week 3	FF05	Building an App - Start with Tables and Fields	This course walks you through the fundamental steps of creating a Quickbase app from scratch.	6	0:17:00
Week 3	FF06	Building an App - Adding Relationships	Create relationships between tables to efficiently manage and report on your data.	10	0:31:00
Week 4	FF07	Building User Friendly Forms	Customizing your data entry forms will enhance your end user experience and drive the success of your app.	8	0:28:00
Week 4	FF08	Distributing Data with Reports	Leverage the many reporting features to deliver the right data to the right users.	7	0:24:00
Week 5	FF09	Customizing App and Table Home Pages	Create dynamic and engaging home pages for your app and individual tables.	7	0:28:00
Week 6	FF23	Working with Roles and Permissions	Leverage roles to control the level of access a user has to information in an application.	7	0:21:25
Week 7	FF24	Managing Email Notifications, Reminders, and Subscriptions	Keep your end users up to date on key information and modifications to your app with timely email notifications, subscriptions, and reminders.	5	0:14:14
Week 7	FF25	Managing Your App	Application Managers learn to customize app properties and app management settings.	7	0:14:14

Path to App Certification weeks 8-12

ALL EXAMS					
	Course #	Content	Description	# of Lessons	Duration (HH:MM:SS)
Week 8	II02	Using Relationships to Solve Complex Problems	In this course covers many-to-many relationships and how and when to create them, as well as how to create conditional and cascading conditional dropdowns to simplify the design of your app.	8	1:14:25
Week 9	II03	Managing your Apps with Roles	This course covers managing your apps though the use of roles.	4	0:13:52
Week 10	II05	Distributing Data with Enhanced Reports	QuickBase makes it easy to share and distribute reports with members of your team. Additionally, you can customize what data your users have access to, and how your reports display. This course covers different methods of sharing reports and customizing the data for access.	4	0:42:24
Week 11	II06	Maximizing Forms	This course takes the fundamental concepts about building relationships and creating forms one step further and shows you how to create report link fields and build and customize multiple forms to control how data is entered into your app and by whom.	1	0:09:51
Week 12	II07	Gaining Efficiency Through Formulas	As your application grows, so will the need for efficiency in how you use and exploit your data. Formulas are a powerful tool to help automate and configure applications to be most effective. This course covers how and when to use formulas to combine the contents of fields to create new data and efficiency through automation.	10	1:01:33

Path to Expert Certification weeks 13-16

Advanced - Expert Exam					
	Course #	Content	Description	# of Lessons	Duration (HH:MM:SS)
Week 13	AA01	Advanced Use of Formulas	Automating your workflow with formulas is a very effective way to add efficiency to your processes.	27	1:49:43
Week 14	AA02	API Boot Camp	This course presents the core knowledge needed to leverage Quickbase XML APIs.	16	0:51:22
Week 15	AA03	Complex Workflow and Automation	This course presents some of the advanced functionality of Quickbase as it relates to workflow..	21	1:32:47
Week 16	AA04	Introduction to Webhooks	This course provides an introduction to Webhooks and examples of where and how to use them within Quickbase	10	0:44:28

Path to Expert Certification weeks 17-24

Advanced- Expert Exam					
	Course #	Content	Description	# of Lessons	Duration (HH:MM:SS)
Week 17		Certification Prep-course	This course will help you gain a better understanding of the App Builder Certification Exam. **Please Note: This course is geared towards individuals looking to pass the App Builder Certification. This session will not cover the Expert Builder Certification Exam	1	65:00
Week 19	EF05	Empower 2021	EMPOWER Sessions provide a range of content including technical How Tos, best practices for app building and process improvement, surprising and exciting use cases across a variety of industries, as well as thought leadership on organizational transformation.	46	65:33:00
Weeks 20-24		Practice	Use this time to practice and hone your skills in Quickbase. You can build a training app or apply these features to an existing app. Remember that you can practice your skills with a free Builder account in the Quickbase Builder Program.		

Path to Pipelines Builder Certification

Note: All learning content for this certification is sequenced in the learning path: Path to Pipelines Builder Certification

Pipelines Builder					
	Course #	Content	Description	# of Lessons	Duration (HH:MM:SS)
Week 1	PI-01	Getting Started with Pipelines	This course introduces Pipelines and walks you through creating your first pipelines. Learn how you can Manage pipeline users and enable channels, plan and build pipelines to enhance your applications, schedule pipelines, and test pipelines	2	2:04:00
Week 1	PI-03	Managing Pipelines in the My pipelines Page	This course demonstrates the basic administrative tasks for creating and managing Pipelines as integrations inside of Quickbase.	1	00:20:00
Week 2	PI-02	Building Powerful Pipelines Using Included Features	This course enhances your knowledge of Pipelines and covers how to create powerful pipelines using included channels and functionality. Learn how you can use conditional statements in a pipeline, link and fetch records between steps and pipelines, utilize the Bucket channel to store information for later use by pipelines, call a pipeline from another pipeline, and transform data between apps	3.5	03:18:00
Week 3		Pipeline Building and Editing	This series of courses enhances your knowledge of Pipelines and covers how to create use the Quickbase channel's On New Event trigger, import CSV files, automate different types of processes, and use various included channels.	6	02:37:00

Path to Pipelines Builder Certification

Pipelines Builder				
Course #	Content	Description	# of Lessons	Duration (HH:MM:SS)
Week 4	Pipeline Best Practices, Testing, Tips, and Tricks	This series of courses focuses on building efficient pipelines and avoiding common design mistakes and problems. It also covers tips and tricks, and how to test and troubleshoot pipelines.	2	0049:00
Week 4	Managing Files with Pipelines	Get the most out of file management tools, like Box or Dropbox. This course covers the key functionality for managing files across file management tools.	1	00:26:00
Weeks 4-12	Practice	Use this time to practice and hone your Pipelines skills in Quickbase. It is also highly recommended to follow #pipelines-building-help on Slack as you work and share ideas with other Builders. Remember that you can practice your skills with a free Builder account in the Quickbase Builder Program.		

Continued Learning Opportunities

Once you are certified, you need to fulfill renewal requirements each year to maintain your certification. Once published, these requirements will be listed in the Certification area at Quickbase University.

Also, look for new courses on University, user summits, and Empower.