

## Recordbase 5.29 release notes

Wild Bamboo is proud to announce the release of Recordbase 5.29.

This release marks the long-awaited unveiling of our new authentication system as well as a snazzy new referral wizard. We've also tidied up some styling and made the usual slew of bug fixes and minor enhancements.

As with all Recordbase releases, this upgrade is free of charge. You will be upgraded automatically by the Wild Bamboo team, which will require a small out-of-hours outage. We'll give you plenty of notice in advance. If you have any questions about this or any other Recordbase release, please contact our support team: [support@wildbamboo.co.nz](mailto:support@wildbamboo.co.nz).

**Wild Bamboo**

NZ 0800 422 648

AUS 1800 017 785

[support@wildbamboo.co.nz](mailto:support@wildbamboo.co.nz)

# Table of contents

---

- Authentication shifts to email addresses ..... 1
  - User changes to authentication ..... 2
    - How to recover your account if you forget your password ..... 2
    - How to change your password..... 2
  - Administration changes to authentication..... 3
    - Create a new user ..... 3
    - Reset a user’s password..... 3
    - New user: first sign in..... 3
- New referral wizard – beta version ..... 4
- New notification banner on the user dashboard ..... 5
- New Elite report tree customisation ..... 5

# Authentication shifts to email addresses

---

Authentication is how you sign into Recordbase – it's how Recordbase knows that you are the real deal, the genuine article, the one-and-only, authentic you. Traditionally, Recordbase has authenticated via a username and password, but 5.29 marks the end of usernames. From now on, you'll sign into Recordbase using the email address associated with your account:



The shift to email addresses means that users can say goodbye to:

- Account lockouts
- Password reset questions
- Password complexity requirements
- Password expiration

Even though we're shifting authentication to an email-based identity system, it's very important to remember that we will only ever send you information via email – we will never, ever ask you to respond with your password or any account information, nor will we send you a link to click to enter your password.

## Wild Bamboo will never ask you for your password

With the new authentication, Recordbase will email you security codes, but it will **never** ask you to respond with information via email. **The only place to enter your Recordbase password or security code is directly into Recordbase.**

If you receive an email that appears to be from Wild Bamboo or Recordbase, but which asks for your Recordbase password, it is **not** from us. Do not respond and please contact our support team immediately to let us know.

Security is very important to us, so if you are ever suspicious of any email regarding Recordbase, please be safe and contact your superuser or our support team.



## User changes to authentication

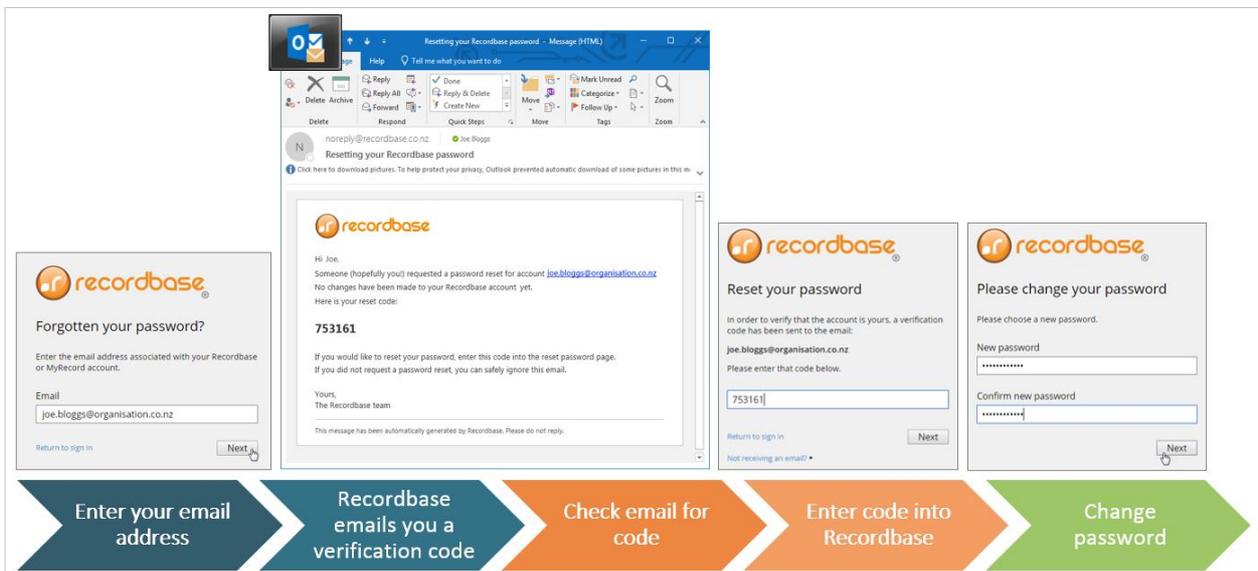
### How to recover your account if you forget your password

In Recordbase 5.28 and earlier versions, forgetting your password has usually meant waiting for a superuser to log in and reset your password for you, a process that we know has been particularly frustrating for overnight and after-hours services, where the superuser may not always be immediately available. This feedback from users was one of the many driving factors for the authentication redesign in Recordbase 5.29. From now on, as long as you have access to your email, you will always be able to get back into Recordbase. Here's how:

1. On the Recordbase sign in screen, choose *Forgot your password?*
2. On the *Forgotten your password?* screen, enter your email address and choose Next.
3. Check your email inbox for a message from Recordbase containing your security code. If you don't receive the email promptly, check your Spam or Junk folders.
4. Enter your security code into Recordbase, as prompted, and choose Next.
5. Choose a secure (but memorable) password.



### Account recovery process in Recordbase 5.29:



### How to change your password

1. Sign in to Recordbase.
2. At the top right, choose *My account | Manage account*.
3. Click *Change my password*.
4. Enter your current password and your new password (twice!), and then choose Save.

## Administration changes to authentication

### Create a new user

When you create a new user from now on, you'll specify the user's email address rather than choosing a username. As a new security enhancement, the password that you set will also be designated a *temporary administrator password* – this means that the new user will have to set a new, secure password at first sign in.

### Reset a user's password

The process to change a user's password is unchanged; however, the enhanced security in Recordbase 5.29 will automatically mark the new password as a *temporary administrator password*. This means that if an administrator resets a user's password, the user will be asked to change their password at next sign in.

### New user: first sign in

A new user's first sign in to Recordbase includes a few extra security steps now, as shown below. First, they'll need to verify their email address (this is essentially the same process as a forgotten password – Recordbase emails them a security code, which they must enter to confirm that the email address is valid and that they do have access to the inbox); then, Recordbase will ask them to set a secure new password. These two extra steps allow users the freedom and flexibility to manage their own accounts via email, while enforcing best practices for password confidentiality.

### First sign in for a new user in Recordbase 5.29:

The diagram illustrates the first sign-in process for a new user in Recordbase 5.29, consisting of three sequential steps:

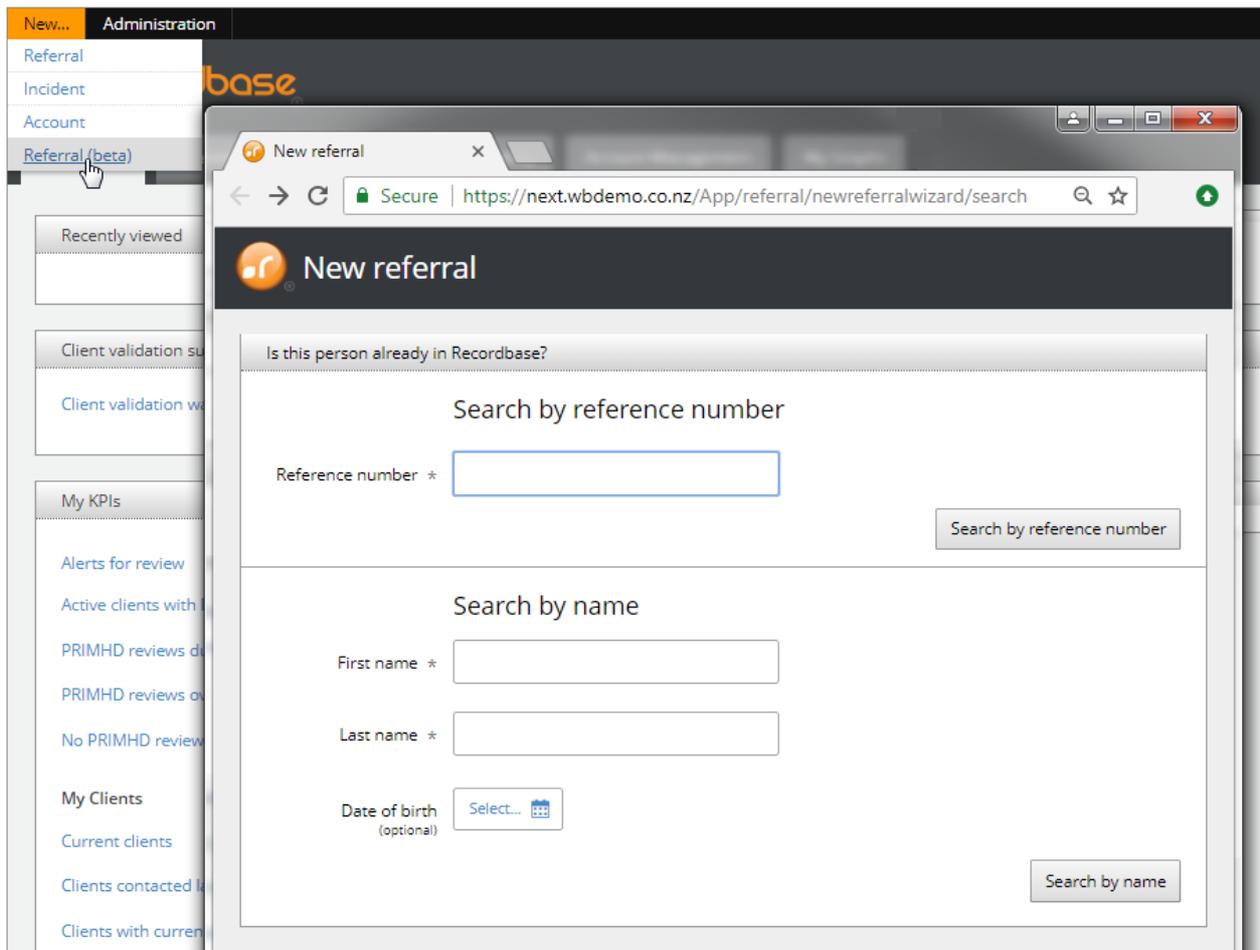
- Sign in:** The user enters their email address (joe.bloggs@organisation.co.nz) and a password. A "Forgot your password?" link is available. A "Sign In" button is at the bottom.
- Verify email address:** The user is prompted to "Confirm your email address". A message states: "In order to verify that the account is yours, a verification code has been sent to the email: joe.bloggs@organisation.co.nz. Please enter that code below." An "Enter your code" input field and a "Next" button are provided. A "Return to sign in" link and a "Not receiving an email?" link are also present.
- Change password:** The user is prompted to "Please change your password". A message states: "Please choose a new password." There are two input fields: "New password" and "Confirm new password". A "Next" button is at the bottom.

The Recordbase logo is visible in the top right corner of the diagram.

## New referral wizard – beta version

While the security experts were busy redeveloping authentication, the designers revisited one of the oldest screens in Recordbase: the new referral wizard. Because we know that everyone uses this wizard differently, we decided to release the redesigned wizard as a beta version for feedback. This means that you can use the new wizard alongside the old and let us know what you think.

To use the new referral wizard, choose *New... / Referral (beta)*, as shown below.



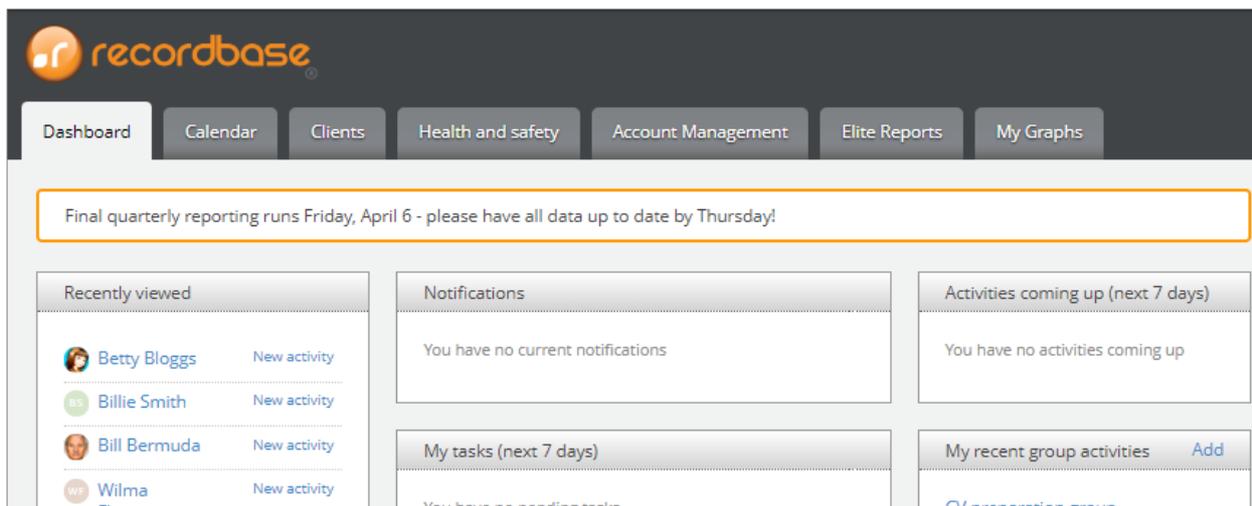
Changes include:

- New sequence flow – find the person first, then choose the team (instead of the current team-then-person flow)
- Search by reference number or by name
- Set primary ethnicity within the new referral wizard
- New team picker with dynamic filtering
- New styling

We'd love to hear your feedback – what works, what doesn't, what would make it better still. If you have an opinion, send it to [support@wildbamboo.co.nz](mailto:support@wildbamboo.co.nz).

# New notification banner on the user dashboard

To replace the sign in screen notification, we've added a notification banner to the user dashboard, which can help alert users to upcoming changes, outages or other important events. When there is no notification, the banner remains hidden. In this first implementation, creating a notification is a Level 3 support task – please contact [support@wildbamboo.co.nz](mailto:support@wildbamboo.co.nz) if you would like to set one up.

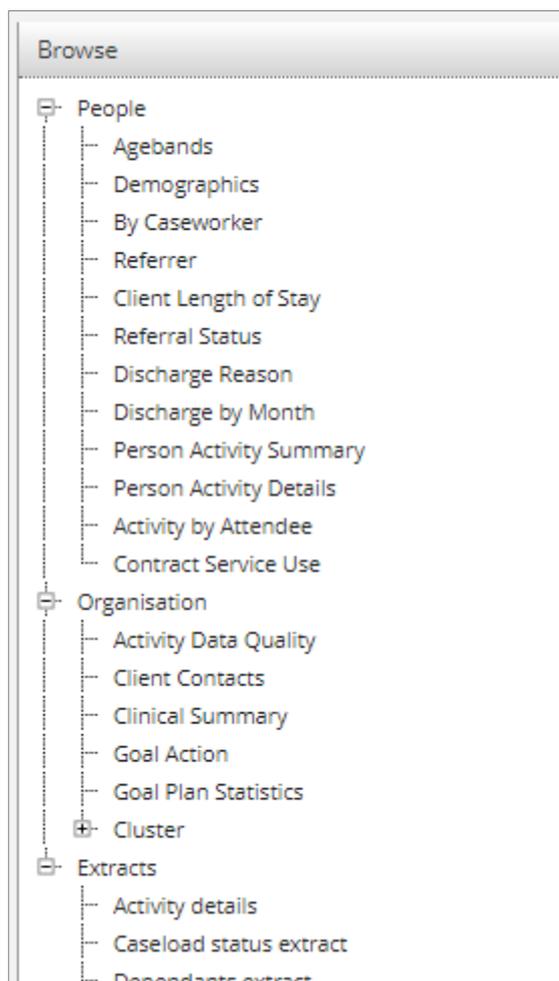


## New Elite report tree customisation

If you remember the exceptionally exciting Elite survey from this time last year, you may remember that one of the most common requests was the ability to save frequently-used reports as Favourites. We're not quite there yet, but we have done a lot of the work under the covers that will ultimately allow you to customise your Elite report tree at an organisational level.

In Recordbase 5.29, we can now hide, rearrange or regroup the Elite reports in your tree picker. After all, if your organization doesn't use a feature in Recordbase, you probably don't need the corresponding reports cluttering up your tree and confusing staff. If there are reports you know everyone uses, we can even set up a single, organisation-wide Favourites category for you.

As this is an early implementation, report tree customization is currently a Level 3 support task – please contact [support@wildbamboo.co.nz](mailto:support@wildbamboo.co.nz) if you'd like to make any changes to your report tree.



## Appendix I – Minor enhancements

---

In addition to the 'big ticket' items, Recordbase 5.29 also includes the following minor enhancements and new items:

Distributed session state
Move medication DB into RB
Referrals - button locations
Panel headers - remove numbers
New permission for Activity Templates
Primhd dashboard widget to match behaviours of list-view
Prevent new user creation if no company is present
Replace team picker control in the user team access screen
PRIMHD service reviews widget - visibility control
Implement most recently view people correctly
Person details > Reference number > disable edit
Personal details > Deceased date > Add string resources to enable field
Default date picker is slow to use for review dates
New referral wizard needs to search on all available reference numbers
Remove length restriction on client search
Port webforms CSS files to LESS

## Appendix II – Bug fixes

---

As always, please contact the team at Wild Bamboo if you discover a bug in Recordbase (no matter how small the issue may appear) so we can fix it. Thanks to your keen eyes and our devoted testers, Recordbase 5.29 also includes the following bug fixes:

New activity template > editing a filter oopses
Edit link displays on deleted hosted notes
MyRecord > crashes when I try to view notes associated to an activity which the client does not have access to
Address > state and province no longer shows
Recordbase logo not showing in emails, related to bulk report
Table sort icons are missing on the Referrals screen
Team view of Employment screen uses same string resource as referral list and employment panel
Timeout is not shared across tabs in IE11
New activity screens (individual and group) should autoselect singleton type/classification/breakdowns
Fix date time picker on new activity screen
DOB picker has 'today' and 'yesterday' options
'Add as new client' button to be on right-hand side
Cursor de-focuses e.g. in subject field for New activity
5.28 has removed Contacts enabled and required string resources
Record numbers are centred in grid when there is only one page
Too much horizontal space on audit history styles without 'status' line
Allocated hours 'delete' has too much top padding
Inconsistent audit text and style in daily care event grid
Smoking status table doesn't use global 'edit' string
Profile pictures not loading, causing crashes
On edit, breakdown control for an individual activity becomes 'disabled' when a breakdown type is soft deleted from team config
Elite ETL > ReferenceNumber tables process in parallel, need to be serial
Client > Activities > New activity > cannot edit To date before you edit From date
Odd wording on MyRecord account details screen where no account exists
Clients > reports > employment plans: not recognising the fact I had made an employment plan selection
Elite > Discharge Reason does not respect referral times
Incident submission drop list may have empty () in user list
Dashboard > group activities edit and clone options are styled badly
Exception when creating new activity note
New referral wizard allows future date of birth selection

MyRecord details page has lost its styling

Personal details > new person link > the relationships fields don't look right

Activating a MyRecord account may not follow correct workflow

String resource says "SharingDetails" (no space) on sharing request person match screen

MyRecord > get a OOPs when I try to create a new account

Client Clinical History: OOPs when I try to view a deleted group activity

Validation is broken on new employment plan screen

NHI field incorrect size in IE11, new referral wizard

Client > Interactions > get an oops when I try to add a new interaction

Window names are not unique across environments

Promise javascript error in Person->Interactions empty list view

Tips are displayed underneath labels for multi-level lookups

Pages with a lot of avatars can jam up browser/IIS waiting for response