Recordbase 5.31 release notes

Wild Bamboo is proud to announce the release of Recordbase 5.31.

This release includes ACC claims and purchase orders, additional report options, custom fields on referrals and personal plans and many more improvements.

All of this work, both the new features and the enhancements to existing features, came about because you asked us for it – so we sure hope you like it! As always, we're keen to hear feedback on this work (what's great, what's not, what would make it better?) and any ideas you have for further improvements and developments. Recordbase is your system after all, so tell us what you need it to do.

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.
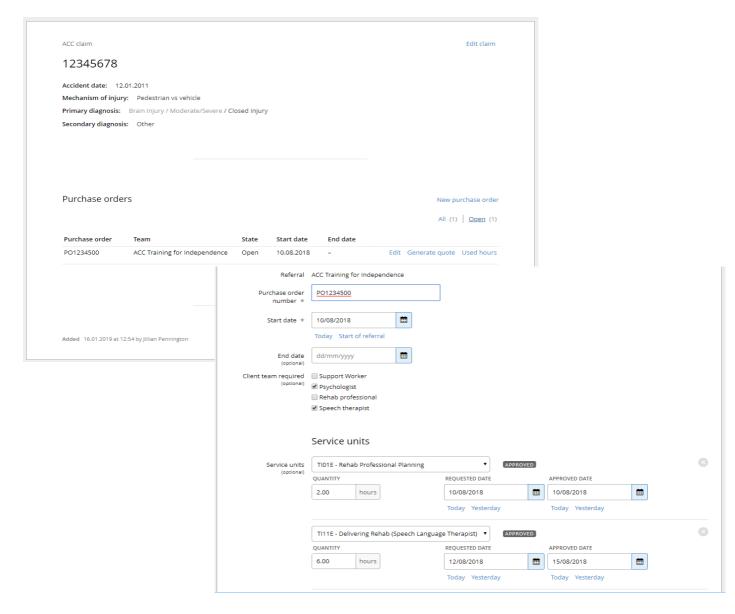
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New features

ACC claims and purchase orders

We have developed a new module to support ACC injury claims. This functionality allows you to:

- Capture the details of an ACC injury claim
- Link details of any purchase orders attached to the claim
- Record the disciplines required to deliver the purchase order
- Allocate the service units to be delivered as part of a purchase order
- Produce a quote to submit to ACC for service unit approval
- Generate certain ACC plans, progress reports and completion reports
- Track the use of approved service units

This functionality requires configuration, so it won't be turned on as part of your upgrade. If you deliver services that deal with ACC injury claims and would like to learn more, get in touch with us at support@wildbamboo.co.nz and we'll schedule a demo.

Custom person reports made easy

Recordbase has always provided a way to generate reports from a client file, but we've never been quite happy with that offering. The options were too limited, formatting flexibility was non-existent, and even minor customisation required chargeable developer effort. We know that it's common for organisations to have a set of standard Word documents used for correspondence with or about clients, and we wanted to provide an easy, inexpensive way for you to generate those documents, pre-populated, from the client's file.

In 5.31, we've come up with a flexible new way to build custom person reports. This new approach is much more cost-effective and gives you far greater control over formatting, layout and content.

The process is straightforward – if you have an existing Word template with your organisation's branding and formatting already set up, simply mark the locations where you want Recordbase data to populate and we'll upload the marked-up template into Recordbase. Once loaded, you'll be able to download the document directly from a client file, pre-populated with the client's basic demographic details.

Marking up the template is simple and if you've got Microsoft Word, you can do it yourself; if you'd rather, we can do this for you for a small cost. This new process supports output to Word, Excel or PDF and even includes the ability to handle more complex situations. If you're interested in having some of your organisation's templates added to Recordbase, get in touch with us at support@wildbamboo.co.nz for more detailed instructions.

Enhancements to existing features

To everyone who gave us feedback and suggested ideas for improvements – thank you! Here's what you told us you wanted, and here's what we did about it. If you have a great idea for 5.32, please let us know at support@wildbamboo.co.nz.

Custom fields on referrals and personal plans

Recordbase has always had the ability to extend the personal details section of a client record with additional custom fields that suit your organisation. Many of you have asked us if we can do this in other areas of Recordbase, so we have added the ability to add your own custom fields to both referrals and personal plans.

This functionality requires configuration that may incur a minimal cost, so if there is more information you'd like to collect against a referral or in a personal plan, email us at support@wildbamboo.co.nz and we can discuss the options with you.

Goal status

Many of you use goals in Recordbase and like to keep track of the progress against them to monitor the client journey. Historically Recordbase has had a way to do this by recording a percentage complete over time. You have let us know that this is not always useful and wanted to have a way to track the status of a

goal outcome at time of progress review. Now you can specify the status of the goal in Recordbase at a point in time - complete, partially complete, in progress.

This functionality won't be turned on as part of your upgrade but it is free to turn on; if it sounds like a better fit for you, please get in touch with us at support@wildbamboo.co.nz and we can enable it for you.

Referrals on hold

There are times when the work you are doing on a referral must be put on hold. This could be due to a 3rd party you are waiting for – e.g. if you are waiting on a piece of equipment to come from overseas, this may take time so work against the referral need to be halted. When this happens, it is important that there is still visibility of why work has halted and to be alerted when work should start again.

Placing a referral on hold in Recordbase lets you maintain this visibility for frontline workers as well as providing the necessary information for managers around progress of referrals.

This functionality won't be turned on as part of your upgrade but is free to turn on; drop us a line at support@wildbamboo.co.nz if you'd like us to enable it.

Hide activity general template for specific teams

Activity templates in Recordbase are a great way to configure the system to make life easier when recording activities. If you have built a comprehensive suite of templates to enforce business process, then you may not want users to be able to circumvent those rules by using the general activity. Where appropriate, we can now hide the general activity on a team-by-team basis.

Since this is just a new configuration option, you won't see any change after the upgrade, but please let us know at support@wildbamboo.co.nz if you'd like us to adjust any of your teams with this new option.

Employment tasks are now editable

Employment plan tasks have historically had stringent rules that caused the tasks to be locked down after creation. Some of you have asked for a bit more flexibility, so that you can choose to update the descriptions on the fly to better reflect the nature of the specific employment plan. In 5.31, you can now edit employment plan task descriptions.

Drag-and-drop attachments

You asked for an easier way to add attachments to Recordbase, so in 5.31, you can simply drag a file into the browser to add it to the client record. This functionality is limited to the latest version of Firefox and Chrome and is intended to speed up the process of attaching files in Recordbase.

While we were making these improvements, we noticed that when parent/child attachment types were configured, only the child showed on the list of attachments. Now the list will show the full attachment type, which means it can be used for searching and filtering.

Updated rich text editors

A while ago some of you alerted us to the fact that in some browsers Recordbase would scroll to the bottom of the form when a new window was opened. In 5.31, we've fixed this little bug; in the process of fixing it, we also replaced the rich text editor with a newer version. The new text editor has the same great functionality, with a slightly different look. You may have noticed that previously, these text editors

sometimes looked different in different screens; the change means they should all look the same and have the same great functionality.

Appendix I – Minor enhancements

In addition to the 'big ticket' items, Recordbase 5.31 also includes the following minor enhancements and new items:

Display the user's browser in the sign-on history screen

Enter a planned absence in advance

Remove Absent/Hospitalisation badges from Referral list screen

PCOMs graphing usability

Radar plot compare for Kessler 10

Improve behaviour around deleted person interaction types

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 5.31 also includes the following bug fixes:

Declined referrals with reviews appear on the PRIMHD review widget.

Make PRIMHD review fields optional

Activity > other participants - Add validation is case insensitive but activity Save is case sensitive

Historic Risks - Risk reviews appearing under Pending Tasks

Dashboard widget fonts inconsistent between Activities and Group Activities

Pages scroll to the bottom on load in Firefox

Dashboard KPIs > SortOrder ignored when GroupName is set

Personal plan with future dated end date should not display as Completed

Double scroll bars fixed on person screens

Appendix III - browser versions and devices

Internet Explorer has been a standard choice for a browser on windows computers for many years, but it's starting to crack under pressure. There are some web applications that simply don't run well in Internet Explorer any longer and there will be more and more of these in the coming months and years. Internet Explorer is still getting security patches, but it's no longer getting any new features developed for it, so as the internet continues to evolve, Internet Explorer will rapidly be left behind.

Wild Bamboo strives to support the platforms you use, but maintaining backwards compatibility with legacy browsers would mean severely limiting the future improvements we can make in Recordbase. We recommend keeping devices on the latest version and changing to supported browsers such as Chrome, Firefox or Safari - not just because Recordbase will perform better, but because almost any web app will. Plus, as with most technology, browser security advances in leaps and bounds practically every day - using a modern browser will keep you and your data safer. Please see the full list of our supported platforms on our website.

https://www.recordbase.co.nz/supported-platforms