

## Recordbase 5.34 release notes

Wild Bamboo is proud to announce the release of Recordbase 5.34.

This release includes the ability to record a note against individuals in a group activity, a collection of improvements that make configuration easier, plus lots of other little improvements behind the scenes.

All this work, both the new features and the enhancements to existing features, came about because you asked us for it – so thank you for the guidance! 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](mailto:support@wildbamboo.co.nz).

**Wild Bamboo**

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# New features in 5.34

## Record individual notes against group activity participants

Group activities have always included notes, but a group activity note is shared by every participant in the group. You told us that sometimes, you also need to add separate notes against individual group participants – and that it would also be useful to link a group activity to individual participants' goals or employment plans.

In 5.34, the view screen for a group activity now includes an *Add details* link for every participant, as shown below. Record your group activity like normal, and then add individual details as required. You can add a client-specific note as well as links to goals, employment plans, protocols, and purchase orders.

The screenshot displays the Recordbase interface for a group activity. The main window shows a 'Group session' titled 'CV writing workshop' held 'Yesterday at 13:00 - 15:00 (2 Hours)'. Below the title, there is a list of participants under the heading 'PRESENT'. The participants listed are Fred Flintstone, McGregor Bennet, John Johnson, and Kim Crawford. Each participant has a circular profile picture and a name. To the right of each participant's name is a blue link labeled 'Add details'. A mouse cursor is hovering over the 'Add details' link for Fred Flintstone. A modal window titled 'Fred Flintstone - Group activity individual details' is open in the foreground. This modal contains a 'Group activity summary' section with 'Subject' as 'Group session' and 'Notes' as 'CV writing workshop'. Below this is an 'Individual details' section with a 'Notes \*' field containing a rich text editor with bold, italic, and red text options. At the bottom, there are two sections: 'Relates to EMPLOYMENT PLANS (optional)' and 'GOALS (optional)'. Both sections have a dropdown menu and an 'Add' button. The 'EMPLOYMENT PLANS' dropdown shows '01.03.2019 Job search - First Job'. The 'GOALS' dropdown shows 'Choose...'. The modal also includes a 'Repeat' button and 'Edit' and 'Copy' links at the top right.

Group activity Repeat Edit Copy

### Group session

Yesterday at 13:00 - 15:00 (2 Hours)

CV writing workshop

PRESENT

- Fred Flintstone [Add details](#)
- McGregor Bennet [Add details](#)
- John Johnson
- Kim Crawford

#### Fred Flintstone - Group activity individual details

Group activity summary

Subject Group session

Notes CV writing workshop

Individual details

Notes \* **B** *I* A

Relates to **EMPLOYMENT PLANS** (optional)  
*There are no related items assigned to this activity*

01.03.2019 Job search - First Job Add

**GOALS** (optional)  
*There are no related items assigned to this activity*

Choose... Add

## Delete a person record

We all wish that we could get things right the first time, every time, but sometimes mistakes happen – for example, sometimes incorrect referrals are entered in Recordbase. Previously, deleting a person record was a task that could only be completed by the Wild Bamboo support team. While we love to hear from you, we figured you would rather be able to fix things yourself. Now you can.

To delete a person, simply click the Delete button on the main details section of the personal details tab.

### Carol Canada




Age	46 years old	Date of birth	16 Jul 1973	Gender	Female
NHI number	JKL9871	Primary ethnicity	Samoan		

Edit | Make private | **Delete**

Added 30.07.2019 at 14:16 by Jillian Pennington

If there are attached items preventing the deletion, Recordbase will let you know.

 **Person records which need to be deleted**

**IMPORTANT**

Deleting a person will remove them from Recordbase; all information recorded will also be deleted. Ensure any information to be kept is moved to another person or written down. You will not be able to recover this person or information.

Person ID: 100039

Full Name: Carol Canada

Approximate age: 46

*The records listed below will need to be deleted before this person can be deleted.*

ResultKey	IncidentPersonId
IncidentPerson	5

As the message says, it is **very** important to note that when you delete a person, every piece of information attached to their record goes with them – make sure you're certain before clicking the button! Access to the person delete button is controlled by role permissions, so get in touch with the support team at [support@wildbamboo.co.nz](mailto:support@wildbamboo.co.nz) to go through how it works in more detail, and then grant the person deletion permission to the appropriate role(s) within your organisation.

## Support enhancements

Looking back through the Wild Bamboo support queue, we noticed some common support requests. Currently, we charge a small fee to cover our time for these tasks, but we think a better solution would be to build this functionality within Recordbase and then provide it to you as self-service support.

For the first iteration of these new features, we have restricted them to Wild Bamboo access only. This means our Level 2 support team will have an entire release cycle to use and improve them before we provide them to you in 5.35, a process that we have used before, and which worked very well. For now, you'll benefit from a much faster turnaround and reduced (or no) cost for these common requests:

- Adding other participant types to activities
- Adding person interaction types to teams
- Configuring purchase order service units

## Enhancements to existing features in 5.34

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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.

### Updated date picker

We had some great feedback on the date pickers we introduced last year, and a common request was to use it for entering dates of birth – so we added it to the new referral wizard. Now you can use the new date picker to type a client's date of birth directly in, rather than using the mouse to select from the calendar. In case you're a fan of the mouse, we also added shortcuts to the year component, so now you can quickly hop back through the decades rather than scrolling.

Search by name

First name \*

Last name \*

Date of birth (optional)

When

April 2020

MON	TUE	WED	THU	FRI	SAT	SUN
		01	02	03		05
06	07	08	09	10		12
13	14	15	16	17		19
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27	28	29	30			

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## Reporting improvements

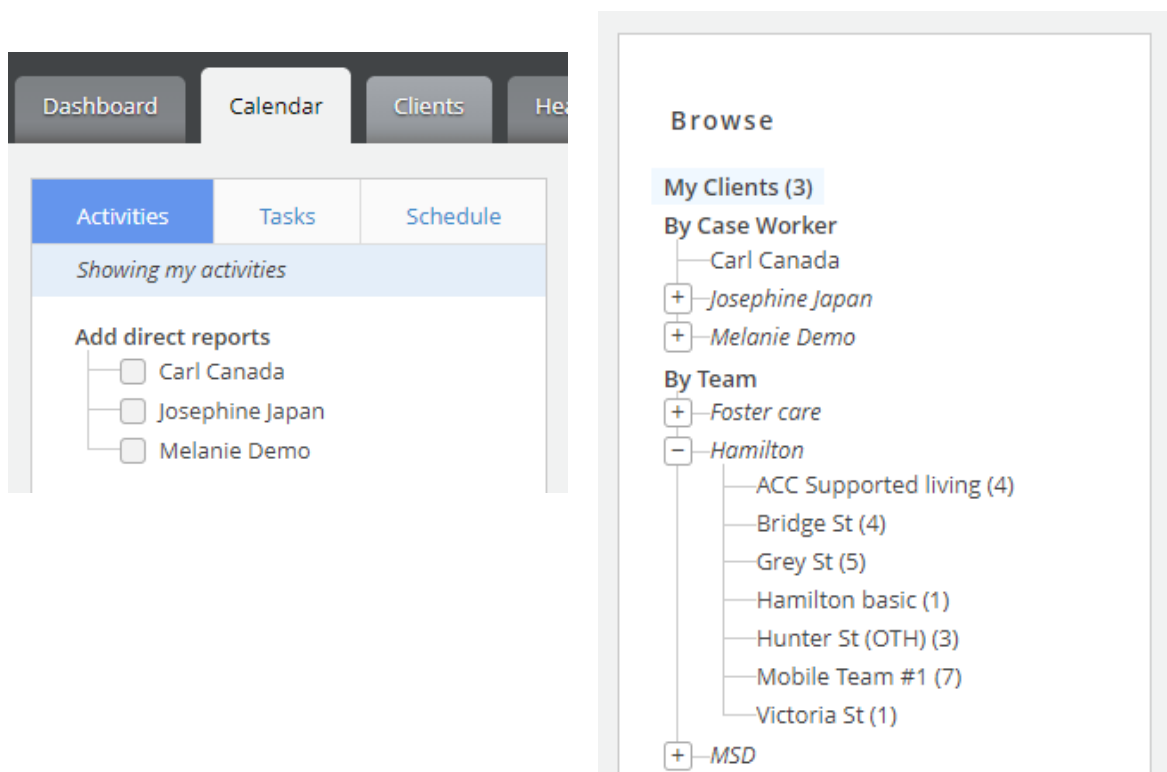
Some of you have been using the Recordbase reporting database for a while now and have enjoyed having direct access to your own data. In this release, we're taking some of the things learned from our new reporting format and applying them to the standard reports in Recordbase.

This means we are better able to hunt down those occasional performance issues that creep up, and can more easily resolve them. This is a continuation of our journey towards providing you with better access to your data.

If you are interested in having direct access to your own data, get in touch with the team at [support@wildbamboo.co.nz](mailto:support@wildbamboo.co.nz) and we can help you to decide on the right options for your organisation.

## New navigation controls

Some of the navigation trees in Recordbase have gotten a little old, and we decided it was time to update them with newer and shinier versions. This means no functional changes for you, but you will notice a difference in the way the navigation controls look on the Calendar and Clients tabs, as shown below.



## Appendix II – Bug fixes

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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 5.34 also includes the following bug fixes:

- Areas no longer duplicating in configuration settings
- Deleting activities with Travel will now remove related participant records correctly

## Appendix III – Browser versions and devices

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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>