

Recordbase 5.35 release notes

Wild Bamboo is proud to announce the release of Recordbase 5.35.

This release includes the ability to configure your activity templates to enforce specific linked items and capture address history. On top of these features, we have also introduced a new look that improves the navigational experience of Recordbase... and it just looks better!

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.

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Enhancements in 5.35

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.

A new Look for Recordbase

Recordbase has always had tabs across the top for the top-level screens, and a menu down the side when you open a client. We’ve changed that, and it not only gives you more useful space on the screen, but it also makes things consistent across all of Recordbase.

The screenshot shows the Recordbase 5.35 dashboard. At the top is a dark blue header with the Recordbase logo on the left and 'Help' and 'Sign out' links on the right. Below the header is a light gray sidebar menu on the left containing links: Dashboard, Calendar, Clients, Health and safety, Group Activities, Elite Reports, Account Management, My Graphs, Extracts, Settings, and Users and Roles. The main content area is white and features a top navigation bar with 'Hi Edgar Ecuador' and 'Signed in as jonathan@wildbamboo.co.nz', along with links for 'New Referral', 'New Account', and 'New Incident'. The main content area is divided into several sections: 'Recently viewed' with a list of clients (Bill Bermuda, Georgia Hanson, Fred Flintstone, Scot Johern, Jack Johanson, Kim Crawford, Charlie Curacao, Gerald Harrison, McGregor Bennet, Erin England) each with a 'New activity' link; 'Notifications' with a message from Bill Bermuda; 'Activities coming up (next 7 days)' with a message stating 'You have no activities coming up'; 'My tasks (next 7 days)' with a table of tasks; and 'Completed Reports'.

Due date	Person name	Description
16.10.2020	Max Smithington	Allergies - sunscreen Risk review
23.10.2020	Fred Flintstone	Barney Rubble Contact consent review
23.10.2020	Jack Johanson	Risk for Jack Risk review


With the new look, comes a much more responsive design. What this means is that you will soon have a much better experience using Recordbase on a mobile device. We know at the moment it's not much fun, the menu takes up half the screen which means constant scrolling! We think the simple improvements that come along with our refreshed design are going to help a lot with this.


Depending on your screen size, the menu will now disappear. But don't worry you will notice that there is a familiar 'hamburger' button (top left) that has appeared that will let you see the menu again - but only when you need it!


Hi Edgar Ecuador
Signed in as jonathan@wildbamboo.co.nz


[New Referral](#)
[New Account](#)
[New Incident](#)


Recently viewed


 [Bill Bermuda](#)


 [Georgia Hanson](#)


 [Fred Flintstone](#)


 [Scot Johern](#)

 [Jack Johanson](#)

 [Kim Crawford](#)

 [Charlie Curacao](#)

 [Gerald Harrison](#)


recordbase

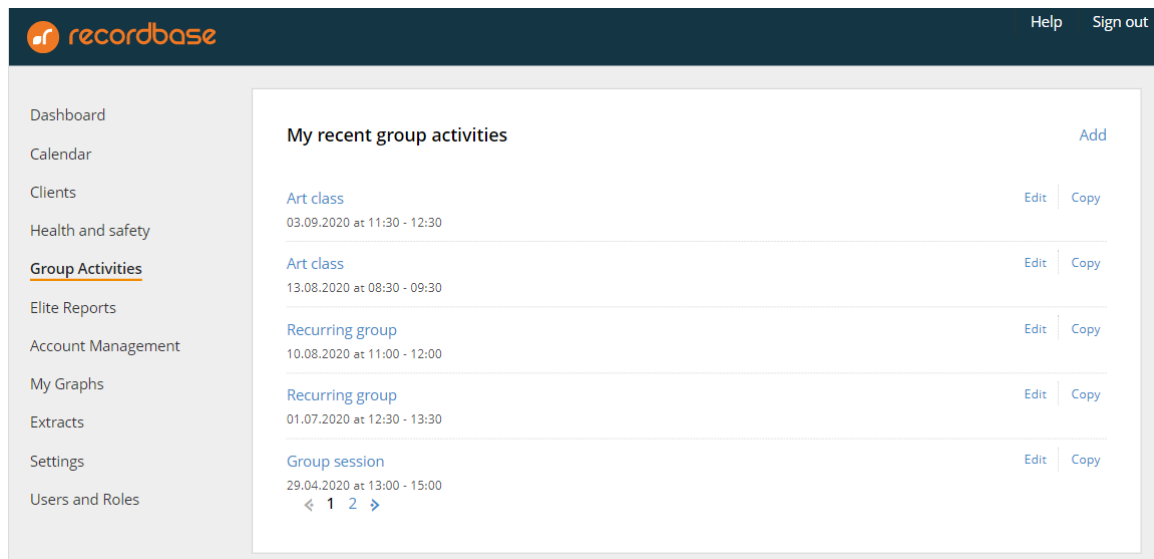
[Help](#)
[Sign out](#)

[Dashboard](#)
[Calendar](#)
[Clients](#)
[Health and safety](#)
[Group Activities](#)
[Elite Reports](#)
[Account Management](#)
[My Graphs](#)
[Extracts](#)
[Settings](#)
[Users and Roles](#)

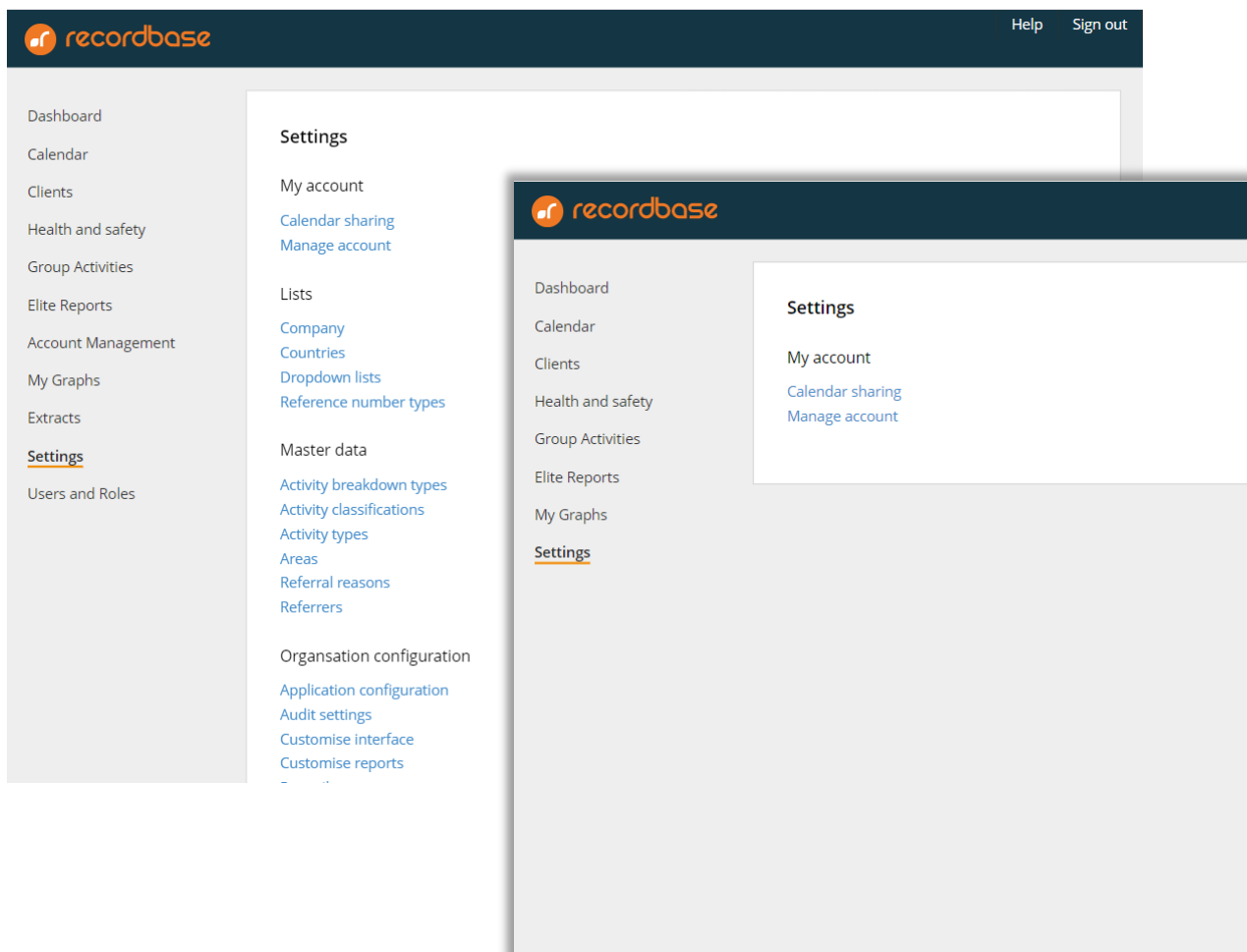
[New Referral](#)
[New Account](#)
[New Incident](#)

[New activity](#)
[New activity](#)
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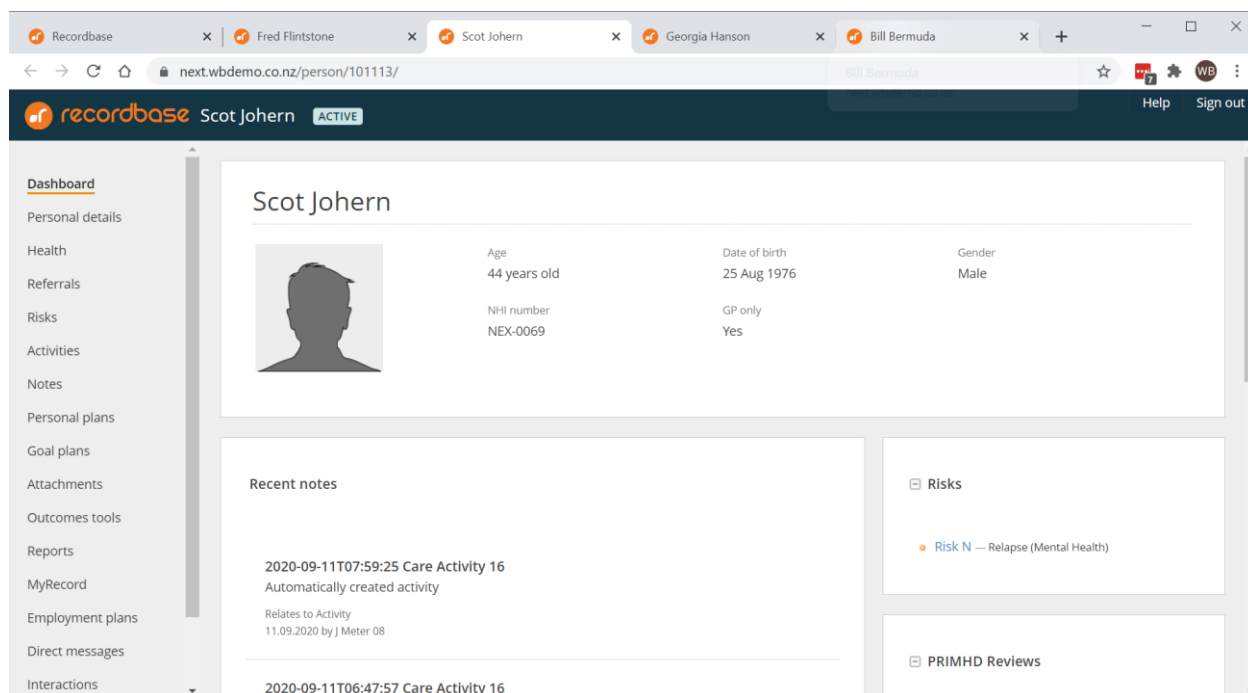
Moving to a vertical menu gives us much more space and this has allowed us to make more options available at this level. For those of you that use group activities, you can now find them in the menu, allowing the list to be less cramped and it will be a much-improved experience on a smaller screen.



Users and Roles have been combined into a single menu for managing user access. A Settings menu will display for all users and gives you access to manage your account and depending on your permissions, you can find all the administrative screens you are used to.



We have also changed the way new screens open in Recordbase. Previously clicking on a client would cause a new window to popup, now in Recordbase 5.35, we make use of the modern browser and have things open in tabs. This makes the experience of using Recordbase in line with everything else you do in the browser, so it should be familiar to you. It also makes it easier to see what you have open – windows can easily be hidden behind other windows, whereas tabs in the browser are easily visible at all times.



Wish you could see a client's goals while writing a note?

Another nice feature that comes with the new design, is the ability to open a client information across multiple tabs in the browser. Because of the way we have changed the navigation structure in Recordbase, it allows you to use standard web browser functionality to open links however you want. This means you could have a client open ready to write a note, and decide to have a look at their goal for context. Currently, if you wanted to do that, you would lose your note - now you can see them side-by-side.

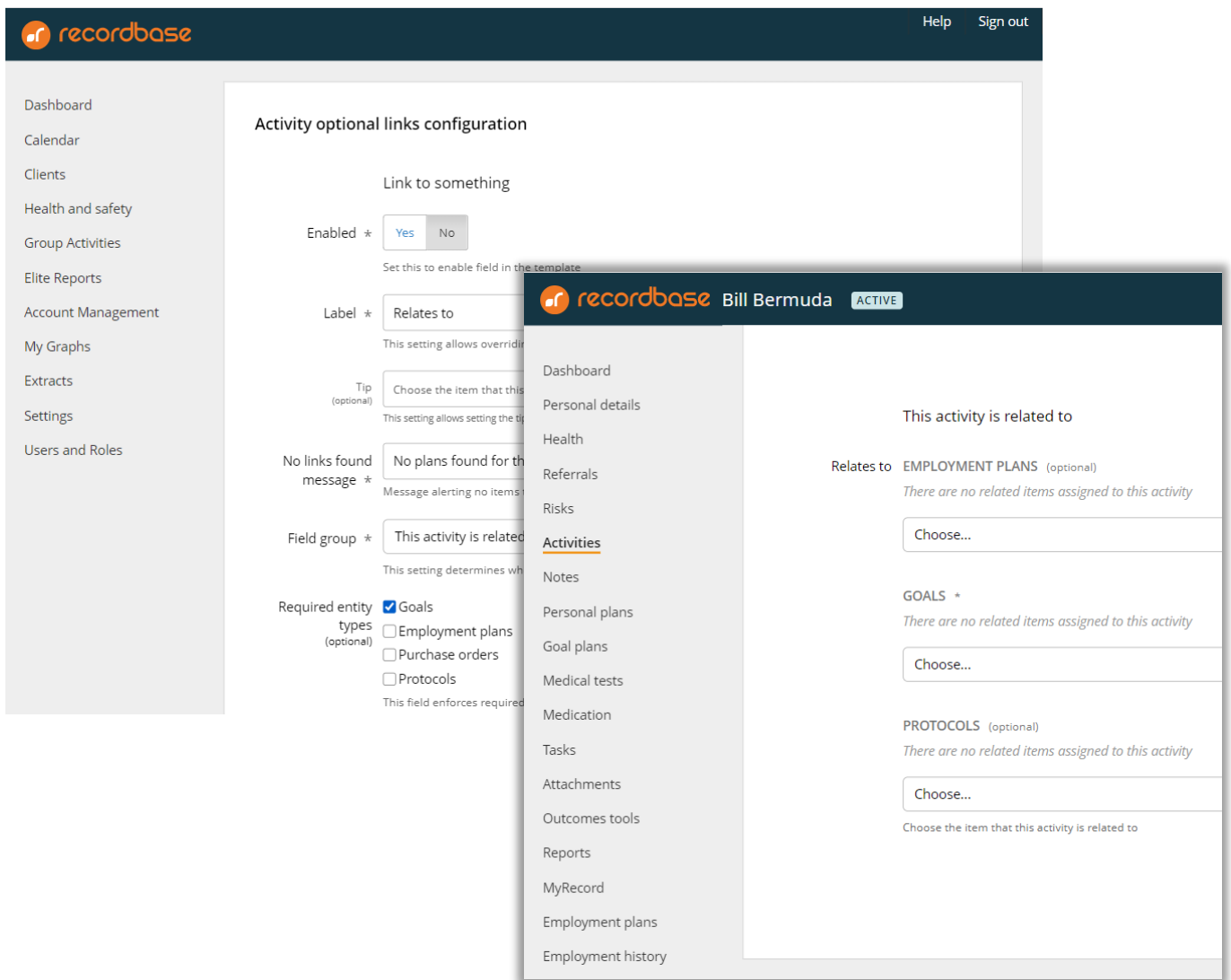
The screenshot displays the Recordbase web application interface. At the top, the header shows the Recordbase logo, the user name 'Bill Bermuda', and a status 'ACTIVE'. Navigation links for 'Help' and 'Sign out' are also present. A sidebar on the left lists various menu items: Dashboard, Personal details, Health, Referrals, Risks, Activities (highlighted), Notes, Personal plans, Goals, Medical, Medical, Tasks, Attachments, Outcomes, and Reports. A context menu is open over the 'Goals' link, offering options like 'Open link in new tab', 'Open link in new window', 'Open link in incognito window', 'Save link as...', 'Copy link address', 'LastPass', and 'Inspect'.

The main content area is divided into two sections. The top section, titled 'New activity', contains a 'Subject' field with the value 'Goal planning' and a 'Notes' field with a rich text editor toolbar. The bottom section, titled 'Goals', shows a specific goal titled 'Participate more in the community'. It includes a 'Start date' of 12.09.2015 and a 'Target completion date' of 24.06.2021 (2112 Days). Below this, there are buttons for 'Edit', 'Delete', 'Complete Goal', and 'Cancel Goal'. A table at the bottom lists actions with columns for 'Due', 'Action', and 'Owner'.

Due	Action	Owner
26.03.2021	Go to the local trivia / quiz night	Bill Bermuda
04.05.2021	Join a club	Bill Bermuda Jo Scothern

Configure activity templates to enforce specific linked items

Many teams have complicated reporting that relies on both activity configuration and linking work to plans or purchase orders so that reporting works correctly. We want to give you more control and let you enforce your business process to ensure good data entry practices. This starts with configuring your activity templates to enforce specific linked items - this means you can set what is required at a team level.

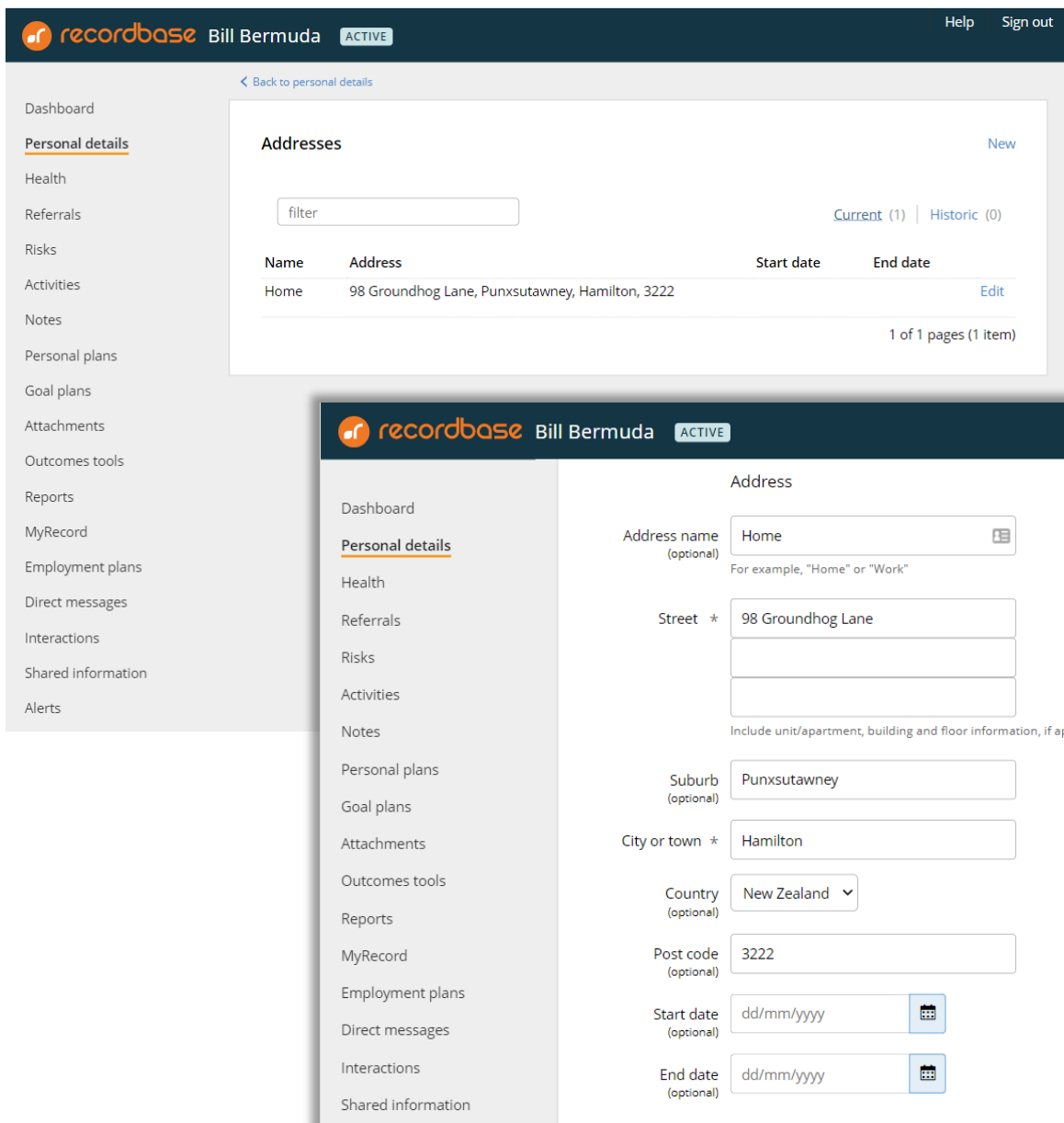


If you are interested in enforcing linked items in activities, get in touch with the team at support@wildbamboo.co.nz and we can help you to decide on the right options for your organisation.

Address history

You always could add addresses in Recordbase, but what happens when a person moves to a new house? You have had to choose between leaving the old address present – making it hard to know the current address – or removing it entirely. Some of you have asked to be able to handle a historical address and now in Recordbase 5.35; addresses can have a start and end date. We are not making these fields compulsory, so do not panic about knowing precise dates. If you do want to archive off an old address (but you do not want to lose the history), you can set the end date; the address changed to a historical state.

The address widget has had a bit of a makeover. You can easily see all addresses (including historical ones) by clicking the view button.



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By Caseworker numbers

In the last release, we changed some of the navigational controls used in Recordbase. While we introduced a newer and shinier control, in the process we removed some functionality that many of you loved – client numbers on the “By Case Worker” selection control.

We have heard your feedback and have made some more changes. We are pleased to announce that in 5.35 these client numbers are back.

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 5.35 also includes the following bug fixes:

- Creating a new user now gives a more informative message when the user already exists.
- People only appear once in the “all people” view of Allocated support hours.
- Purchase orders now allow you to select the referral date as the purchase order start date.
- Disabled users no longer show in the caseworker list.
- By Caseworker tree-view now shows the number of clients next to the caseworker name

Appendix III – Browser versions and devices

Wild Bamboo strives to support the platforms you use, but, maintaining backward 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>