Recordbase 5.37 release notes

Wild Bamboo is proud to announce the release of Recordbase 5.37.

This release includes improved functionality for recording addresses, extended session limit and more capability to help you manage your own Recordbase configuration. We have also added the ability to make use of your own active directory, so you can now enable single sign on and configure your own level of enhanced security.

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.

Wild Bamboo

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Enhancements in 5.37

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.

Recording addresses just got easier

Knowing where the people you support live is really useful, particularly if we need to help with contact tracing. Recordbase has always given you the ability to add someone's address, but it has been a manual task, and this means there has been no way to enforce accurate address information. In Recordbase 5.37, we have introduced an address search feature that is powered by Google maps. Now you can start typing out the address you want to capture and let google fill in the details.

Minimising data loss

We've heard the frustration some people are experiencing with being logged out and losing work. That's understandably annoying, especially if you are writing a long note or get called away partway through the process.

In this release, we have added more prompts in Recordbase to alert you when you navigate away from a page with unsaved changes. We hope this will reduce the chance of losing work when clicking away from the page you are working on.

We believe good systems policies and device practices can address the risk of someone accessing information they shouldn't. With this in mind, we have extended the session to be more in line with a

shift. Now your session will stay open for up to 8 hours – even when you're not actively navigating around the application.

What's best practice with devices?

Every time you move away from your device or screen while using Recordbase, remember:

- save your work and click **Sign out** to close the application
- always lock your device – an easy shortcut on a Windows device is to press the Windows key + L on your keyboard.

Pronouns

Whether we realise it or not, people frequently refer to us using pronouns when speaking about us. Often, these pronouns are gender implied -- such as "he" to refer to a man/boy or "she" to refer to a woman/girl. These associations are not always accurate or helpful.

We think using someone's correct personal pronouns is a way to respect them and create an inclusive environment. In Recodbase 5.37, we have now added the ability to specify a person's pronoun and it will be displayed anywhere their full name is displayed.

This release comes with a selection of default pronouns, but as with everything in Recordbase, you can extend this list if you would like.

Changes to role permissions

Many of you have asked us to have more control over the access that you grant to users in Recordbase. A common request has been to be able to allow users to view and add new items, without being able to edit. Now there is a new option to do this when allocating permissions to a role.

While making this change, we have taken the opportunity to align the language used on the permission screen with the rest of Recordbase. Some of the options have been re-labelled to better reflect the actions you can do in Recordbase. But, don't worry, this all happens behind the scenes and you won't have to re-setup your roles.

"Create" has been changed to "New" and "Read" has been changed to "View". This lines up with the buttons you see in Recordbase.

The list of permission types now looks like this:

New permissions

We have separated out referral rollback so it can be assigned independently of other permissions.

PRIMHD reviews also now has its own set of permissions.
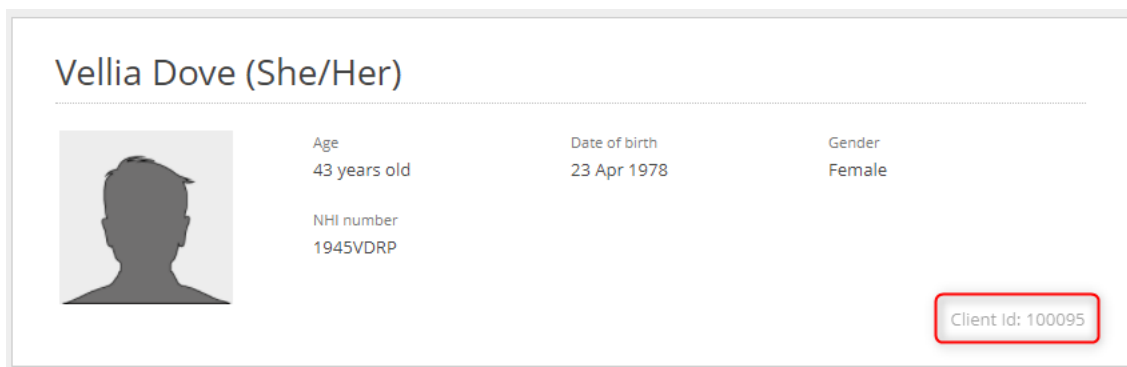
More access to admin features

To give you more control of your own Recordbase setup, we have created some new permissions for person interaction types, Referral Reasons, Referrers. This means you can now manage these configuration options yourself.

☐ Referrers (Referrers management)
Can configure referrers

☐ Referral reasons (Referral reasons management)
Can configure referral reasons

☐ Person interaction types (Person interactions management)
Can configure person interaction types
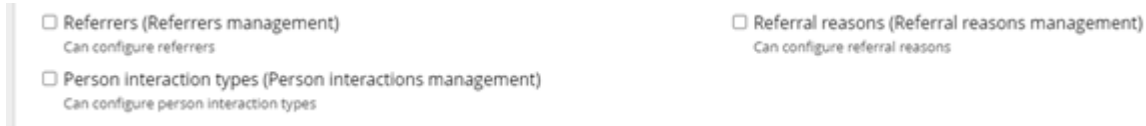
Find people using the information you know

Recordbase now allows you to search for people using additional information. You can search for people by address, phone number and client id.

This makes it easier when you are communicating to the Wild Bamboo support team about a specific service user – referencing the client id means you are not sharing client identifiable over email. We also wanted to make it easier to find a person's id, and it is now visible on their dashboard.

Vellia Dove (She/Her)

Age	Date of birth	Gender
43 years old	23 Apr 1978	Female

NHI number
1945VDRP

Client Id: 100095

Keeping track of the enabled users

We know that staff can change over time, and we want to make it easier for you to manage that in Recordbase. Recordbase is billed based on the number of users you have in the system each month, so we have introduced a new screen to help you keep track of system users.

Anyone that can currently add new users to Recordbase, will now be able to see a new billing menu. Here you will be presented a snapshot of the users currently enabled in the system with easy visibility of the users that have been either added or disabled in the current month. There is also a history of previous months so you can see how your user count is tracking.

recordbase

Previous billing cycle

User count
18

Billing date:
01/10/2021

New users created
0

Users disabled
0

Current billing cycle

User count
18

Expected billing date:
01/11/2021

New users created
0

Users disabled
0

Users that haven't
signed in
18

Previous transactions

Month ˅	Number of users	
September 2021	18	View
August 2021	19	View
July 2021	16	View
June 2021	16	View
May 2021	16	View
April 2021	16	View
March 2021	16	View
February 2021	16	View
January 2021	16	View

1 of 1 pages (9 items)

Single sign on now available

Along with the 5.37 release of Recordbase, we are updating our authentication to include support for single sign on using Azure Active Directory (AD). Enabling single sign on with Azure AD means you can use your work login to access Recordbase. This means one less password to remember and more control over the password complexity required to access Recordbase.

There is some minor configuration required as part of your Azure AD, so you will need to involve your network administrator. Once everything is configured, your sign in screen will change a little. If you are already signed into you work account, you will only be required to enter your email address (for the same account you are currently signed into your computer with) to gain access to Recordbase.
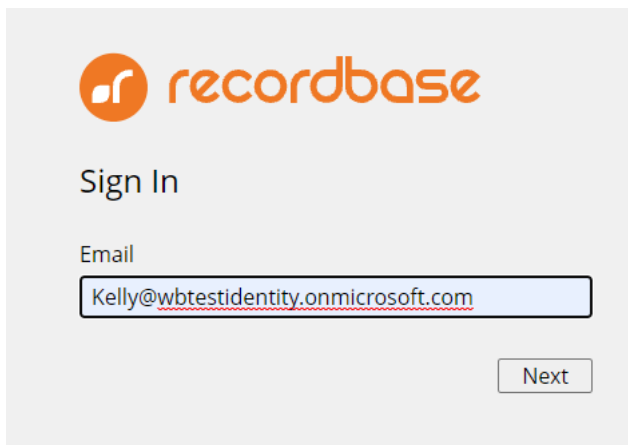
If you would like to hear more about single sign on, or simply want to go ahead and turn it on, please contact the support team to get Recordbase configured for your needs.

Farewell to the old Activity screen

The October 2017 release of Recordbase 5.28 updated Activity screens with a new look, improved usability and smart templates. The change has been around for a while now so it's time to say farewell to the old faithful and embrace the new.

If you were still using the old screen for group activities, please contact the support team to get Recordbase configured for your needs.

Appendix I – Minor changes

As part of the continuous improvement process of the Recordbase system, we've made the following notable bug fixes and minor enhancements:

In addition to the 'big ticket' items, Recordbase 5.37 also includes the following minor enhancements and new items:

- When searching for a person by NHI number in the referral wizard, if the person does not exist then you need to search by name to ensure that they don't exist in Recordbase and reduce possibilities of duplicate people.
- A referral will now display a validation message on discharge if it requires a PRIMHD service review
- Attachments will now validate if you try to upload an empty file
- Improved performance of the recently viewed dashboard widget
- When creating a repeating activity you can now select all days instead of selecting all individually
- Person activity report element now includes the activity creator details

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 5.37 also includes the following bug fixes:

- Risks brief description now enforces maximum length of 250 characters
- My Graphs now correctly displays travel time and includes both travel to and travel from
- Snapshot report now includes last day
- Service units are now ordered alphabetically within a purchase unit

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