

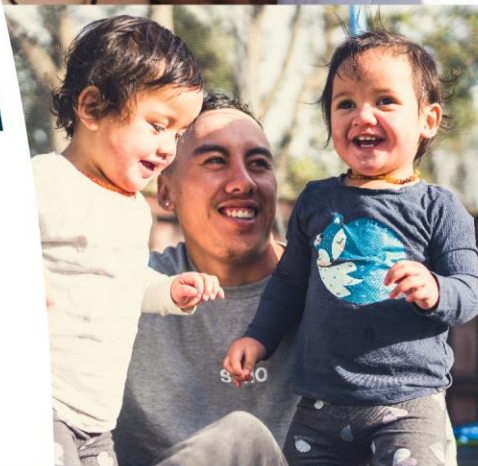


Recordbase



February 2023

What's new





Highlights of new release

We are committed to our mahi of providing you with a product that lets you get back to your core purpose and away from the computer.

This year to make new features available as soon as possible we have refreshed our product releases – running out smaller mini releases like this one with small “byte-sized” changes throughout the year and two major releases designed to really provide significant changes.

This release provides user delegated authority, expands on our pronoun and gender identity functionality and fixes a display issue for direct relationships. Along with these key changes, this release includes a lot of work behind the scenes that will improve performance and general user experience.

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User delegated authority

Many organisations over the holiday period have had to juggle the challenge of managing rosters and cover. In some cases, staff may need to report to more than one team leader, this could be due a team leader being away, or the nature of the team structure.

In some cases, staff may need to report to more than one team leader, this could be due a team leader being away, or the nature of the team structure. Making use of the "Reports To" feature on the User is a great way to allow a team leader to easily manage a caseworker's case load, but it does have the limitation that only one team leader can make use of this.

Now, Recordbase allows you to delegate authority to another user. This means that if you are away on leave, or just need someone to have oversight, you can assign another user to manage the staff that report to you.

Delegating authority

Assigning another user to manage your direct reports is simple. Open the user administration screen and select the users whose direct reports you want to manage. In the edit screen for that user assign the person to be delegated to in the delegate authority to field

Additional information

Position

Employee number

Employment type

Select the type of employment for this user

Volunteer ☐ Yes ☐ No

Select whether this user works as a volunteer

FTE

Enter the FTE for this user

Reports to

Delegate authority to
Assign another user to manage your direct reports

Comments

John Jones
Team Lead

Now when you look on the Clients list screen in the By Caseworker section, you will see the staff that report to the other user.

Recordbase Help Sign out

Dashboard
CALENDAR
Activities
Tasks
Schedule

OUR PEOPLE
Clients
By Team
Client Reports
Group Activities
Allocated Hours

OUR ORGANISATION
Health and safety
Account Management

INSIGHTS
My Graphs
Elite Reports

ADMINISTRATION
Settings
Users and Roles

Search
Search by name or reference number
Go

Browse
My Clients (0)
By Case Worker
Andy Argentina (0)
Edgar Ecuador (8)
Jenny Friend (0)
Milly Robbins (6)
Shay Matthews (0)
Tania Scott (0)
By Team
Northern Region

Edgar Ecuador New Referral

Caseload Report Group Reports

Pending 1

Received date	Name	Caseworkers	Team	Days in pending
16/05/2018	Austin Willis	Edgar Ecuador	East Street Day Programme	1713
09/02/2019	Austin Willis	Edgar Ecuador	Central Square AOD	1444

Waitlisted 0

Accepted 6

Accepted date	Name	Caseworkers	Team	Current status	Days in service
30/06/2018	Aaron Peters	Edgar Ecuador	East Street Day Programme	Active	1668
26/09/2018	Adam Matthews	Edgar Ecuador	North Street Community	Active	1580
15/11/2018	Brooke Hughes	Edgar Ecuador	East Street Respite	Active	1530
24/10/2018	Finau Lawson	Edgar Ecuador	East Street Day Programme	Active	1552
11/10/2018	Joanne Livingston	Edgar Ecuador	East Street Residential	Active	1565
07/03/2018	Mandy Govers	Edgar Ecuador	Central Square AOD	Active	1783

If you would like to be involved with future development in this space, please contact the [product team](#) and we will get in touch.

Pronouns and gender identity

We are always looking for ways to improve Recordbase, and sometimes we don't get it right first time.


Back in 5.37 we added pronouns to Recordbase as a way to be more respectful and contribute to an inclusive environment. Our design allowed you to specify a list of "known" pronouns. This meant you could extend the list as required, but it was an admin task to do so.


This has resulted in a barrier to easily enter someone's correct personal pronoun. The last thing you want to have to do is have to wait for someone to enter a new option, before you can update a person's details.


We have heard your message and agree. In this release, we have followed the direction from Stats NZ and made changes to make things easier.

Now when you are entering a pronoun, if the default options are not appropriate there is an option "Another pronoun".

Other Details


Date of birth * 16/05/1996 
When was the person born?


Deceased date (optional) dd/mm/yyyy 


NHI number * RGC2590 

Gender * Male Female Unknown Indeterminate

Gender identity (optional) Male Female Gender diverse Another gender identity None of these

Another Gender Identity * Genderfluid 

Pronouns (optional) None of these 
None of these
She/Her
He/Him
They/Them
Ze/Hir

Marital status (optional) 

Residency status (optional) Another pronoun Resident Awaiting Application None of these

When you select this, you will be given the option to enter your own pronoun. We have taken the same approach with gender identity.

Pronouns (optional) Another pronoun ▼

Another Pronoun * Ve/Ver

Direct relationships

In the last release, we introduced changes to Direct Relationship that we hoped would make life easier for you.

However, the design only showed the final selected relationship type when it was part of a multi-level selection. This has now been fixed and Recordbase will show the full relationship type text.

Direct Relationships			New
Linked Person	Relationship type	Primary Person	
Dale Simons	Family / Son to	Adam Matthews	Edit

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:

- The attachment file size limit has been increased to 100MB
- By Team list now shows all available support levels when this grouping is picked
- The person details report element now contains all default fields
- Reference numbers can now have an expiry date set
- By Team list now shows the correct counts when a filter is applied
- The team list presented for client reports is now ordered alphabetically and only shows active teams

Appendix II – 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, Edge, 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>