Recordbase

What's New

Version 5.46

March 2025

Highlights of this release

Welcome to your 'What's New' Product Release Guide – Version 5.46. In this guide, we outline and describe the key updates and changes in each release.

We are committed to providing a product that helps you get back to your core purpose and away from the computer.

In this release, we have:

- Added custom validation for reference numbers
- Made improvements to goals to support Hauora Māori Outcomes reporting
- Included a number of small improvements as a result of customer requests

These changes are intended to streamline managing your records so you can get back to doing what matters.

We're here to help you make the most out of Recordbase. Please contact us if you have any questions.
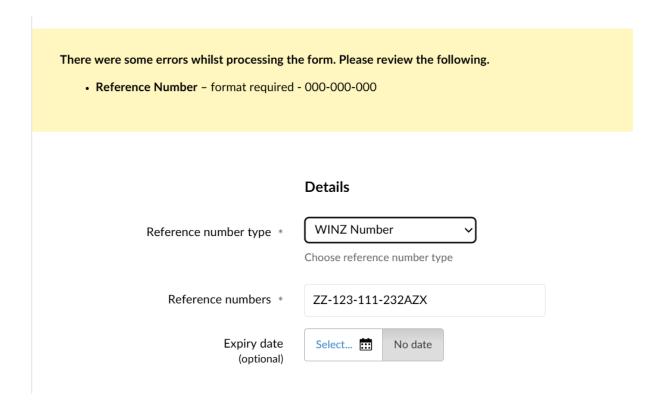
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Custom reference number validation

In Recordbase, people are identified by reference numbers such as their primary reference number (NHI). In this release, Recordbase allows you to specify validation for multiple alternate reference numbers.

You can now specify an expression to validate reference numbers so that the correct format is entered. This ensures your records stay consistent. For example, the SWN reference number is made up of three sets of three numbers separated by a hyphen (-). To ensure accurate data entry, you can now enforce this format to catch errors before they are saved.

There were some errors whilst processing the form. Please review the following.

- **Reference Number** – format required - 000-000-000

Details

Reference number type *   WINZ Number

Choose reference number type

Reference numbers *   ZZ-123-111-232AZX
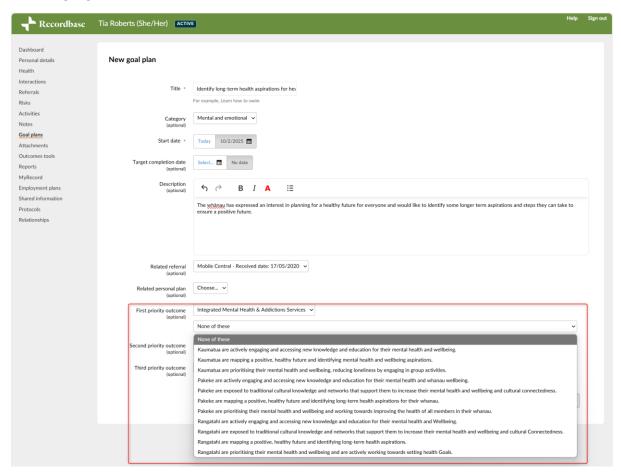
Expiry date
(optional)   Select... 📅   No date

If you make regular use of expressions, please reach out and we can give you some more guidance on how this works. Alternatively, please reach out to support@wildbamboo.co.nz and we will get it set up to meet your needs.

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Priority outcomes

To support the collection of data required for Hauora Māori Outcomes reporting, we have extended the way we record goals and goal actions with the concept of **priority outcomes**. Outcomes need to be identified in order to track progress on achieving them.

Changes to goals

The Goals screen now lets you capture priority outcomes. A single goal can cover more than a single outcome, so Recordbase now allows you to specify up to three outcomes to prioritise for a single goal.
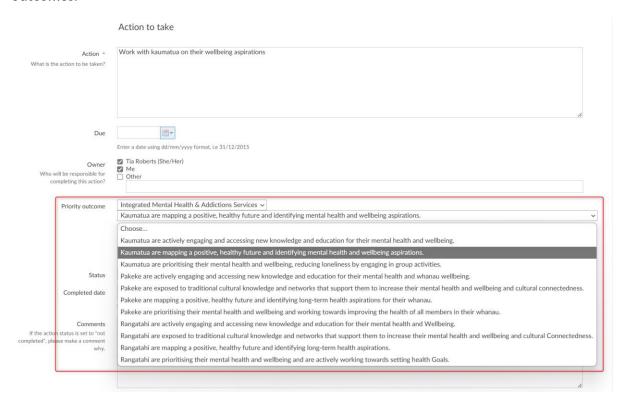

We have pre-populated the list of outcomes based on the requirements from Hauora Māori Outcomes reporting, but you can easily tailor this for your own organisation.

These fields are hidden by default. If you would like to make use of this feature, please contact support@wildbamboo.co.nz and we will get it set up to meet your needs.

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Change to goal actions

Once you have set up priority outcomes, you can also indicate your progress towards achieving them. To meet this requirement, we have extended goal actions to allow you to specify a single priority outcome. This allows you to track progress on delivering on individual outcomes.

To supplement this change, we have also added a completion date for goal actions. Previously you could mark a goal action status as Complete, now you can also record the date the action was completed.

It is important to note that with our initial release, there is no link between the goal action status selected and the visibility of the completed date.

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Again, both of these fields are hidden by default, but if you would like to make use of this feature, please contact support@wildbamboo.co.nz.

New reports

In order to meet the specific reporting requirements for Hauora Māori Outcomes reporting, we have added three reports.

1. Whānau Outcomes KPI Extract

2. Whānau Members Breakdown Extract

3. Whānau Outcomes Reporting Extract

Collectively, these reports will allow you to easily generate the reporting information required to meet the needs of your contract.

More information can be found in the Hauora Māori Outcomes Reporting Data Entry Guide.

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Appendix I – Minor changes

As part of our continuous improvements, we have made the following notable bug fixes and minor enhancements:

- Direct reports correctly show on the calendar

- The *outbound referral creator* permission splits access between inbound and outbound referrals

- Elite attachment reports now include a *flagged attachments* column

- The Notes tab can now be hidden to ensure all notes are added through activities

- Presenting issues have been added to the people report column picker

- The 'IMPHA Youth Extract' has been added to support required reporting

- The 'Awhi Ora Extract' has been added to support reporting to Synergia

- 'Region' and 'Industry' have been added as optional columns to the Account Activity report

- 'Activity Creator' and 'Facilitator' have been added as optional columns to the 'Contract Service Use with Travel time' report

- The tasks list now shows the correct caseworker list for users with 'Delegated authority'

- 'By Team' now correctly displays the most recent active referral

- In the MSD Vocational extract, the platform should only bring back Employment placements that overlap with the reporting period

- Demographic people reports in Elite now correctly display the most recently created current primary address

- Incident Team Administrator permissions allows a completed incident to be rolled back

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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 updated to the latest version and changing to a supported browser such as Chrome, Edge, Firefox or Safari, not just because Recordbase will perform better, but because almost any web app will. As with most technology, browser security advances in leaps and bounds 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/recordbase-and-supported-browsers