

The Chart Library

See what the Chart Library holds, how built-in and organisation Chart templates differ, and what each status and button means.

WHO IT IS FOR Owner, Admin	TIME NEEDED About 5 minutes	LAST REVIEWED 2 October 2026
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Who this is for

Permissions: You need permission to view chart templates to open the Chart Library, and permission to manage them to change anything in it. Owners and Admins have both by default. Without view permission, the page says that you do not have permission to view the Chart Library.

What the Chart Library is

The Chart Library is where your organisation looks after its Chart templates. A Chart template is the reusable design of a Chart. It does not belong to any client until you assign it.

To open it, choose **Configuration** in the left menu, then **Chart Library** under **System**. The page is called **Chart Library Settings** and has two tabs, **Organisation templates** and **Built-in templates**.

The Chart Library holds Chart templates only. Form templates are kept separately, in Reports & Forms.

Owners and Admins can view and manage Chart templates by default. If your role cannot, the page says **You do not have permission to view the Chart Library.** or the buttons that change something are greyed out.



Built-in templates

BondiByte provides five built-in templates, available to every organisation. Each is marked **Built-in**. You can choose **Preview** to look at one, or **Clone** to make your own copy. A built-in template cannot be edited or assigned to a client.

Behaviour Monitoring records the time, the behaviour observed, the trigger or context, the support provided, the outcome and notes.

Food & Fluid records the time, a meal or drink, a description, the amount taken, the fluid amount in mL and notes.

General Observation records the time, an observation, the action taken and whether follow-up is needed.

Medication Administration records the time, a medication or dose, a status or outcome, who witnessed it and notes. The list of medications or doses is empty in the template. Your organisation sets it for each client. The template does not hold medical information and is not medical advice.

Sleep Monitoring records a table of sleep checks, each with a time, a status and notes, and a summary.

See also:

- Clone a built-in Chart template

Organisation templates

The **Organisation templates** tab lists the templates your organisation has cloned or built. The number on the tab counts them, not including archived templates. Each row shows the **Name**, **Status**, **Version**, **Assigned to**, the **Staff mobile app** switch and when the template was last **Updated**.

Assigned to says **Not assigned to a client yet** or how many clients the template has been assigned to.

The buttons on a row depend on its status. **Edit** opens the template builder. **Preview** shows the fields. **Clone** makes a copy. **Activate** publishes a Draft template. **Deactivate** and **Assign to client** are offered on a Published template. **Archive** hides a template, and **Restore** brings an archived one back.

Use **+ Start from scratch** to build a new template. If you have archived templates, a switch labelled **Show archived** lists them.



Configuration Configuration needs attention Demo User Demo Organisation

SYSTEM

Chart Library Settings

Build and manage the chart templates your organisation uses to record structured data.

Manage the chart templates your organisation uses to record structured, repeatable data.

1 Organisation templates 2 Built-in templates 5

Organisation templates

Chart templates your organisation has created or cloned.

+ Start from scratch

NAME	STATUS	VERSION	ASSIGNED TO	STAFF MOBILE APP	UPDATED						
Sample Fluid Chart	2 Published	v1	3 Assigned to 1 client	4 ☒	02/10/2026 06:10 pm	Edit	Preview	Deactivate	Assign to client	Clone	Archive
Sample Meal Chart	Published	v1	Not assigned to a client yet	☐	02/10/2026 05:32 pm	Edit	Preview	Deactivate	Assign to client	Clone	Archive

Rows 50 Back 1-2 of 2 organisation chart templates Next

The Organisation templates tab (1) lists each template with its Status (2), the clients it is assigned to (3) and its Staff mobile app switch (4).

- See also: Create an organisation Chart template

Statuses and versions

Draft: the template is being built, has not been activated yet, or has been deactivated. A Draft template cannot be assigned to a client.

Published: the template can be assigned to clients. Publishing a template, or activating a Draft that has never been published, creates a version, shown in **Version** as v1, v2 and so on. Activating a template you deactivated, without changing it, makes the version it already had available again.

Archived: the template is hidden from the list. Turn on **Show archived** to see it, and choose **Restore** to use it again.

To change a Published template, choose **Edit**, change the fields and publish again. The changes are kept as a draft until you publish them, and publishing creates the next version. Entries already recorded keep the version they were recorded on.



Deactivating and archiving

A Chart is available for new entries only while its template is Published. When you deactivate or archive a template, its status is no longer Published, so it cannot be assigned and the Charts already given to clients from it are not available for new entries on the Staff App.

The Charts already assigned and the entries already recorded are kept. When the template is Published again, for example after you activate it or restore it, those Charts become available again.

Deactivate returns the template to **Draft**. **Archive** moves it to **Archived**. BondiByte asks you to confirm before it does either.

Restore returns an archived template to **Published** if it was published before, and to **Draft** if it was not.

The Staff mobile app switch

Each organisation template has a **Staff mobile app** switch. It is off for a new or cloned template. A Chart can appear on the Staff App only when the switch is on, as well as the template being Published and the Chart being assigned to the client and active for that client.

The window that assigns a Chart to a client offers **Show on the staff app**, which turns the switch on for you. Built-in templates have no switch. They show **Clone to use on mobile**.

See also:

- Assign a Chart to a client
- Charts overview

Important notes

Important: The Chart Library holds the design of a Chart. Nothing in it is available to staff until the template is Published, assigned to a client, activated for that client and shown on the Staff App.

Tip: To see which clients have a Chart, open the client's record and choose its **Charts** tab.

Good practice

- Choose Preview before you activate a template, and activate it only when the fields are right. Each later change you publish makes a new version.
- Give a template a name that says what it records. The name becomes the Chart's name for each client you assign it to, until you rename it for a client.
- Before you deactivate or archive a template, look at its **Assigned to** column. While a template is not published, the Charts clients already have from it leave the Staff App and refuse new entries.

Need more help?

Guides: bondibbyterobotics.com.au/guides | Support: support@bondibbyterobotics.com.au

*Screens show a demonstration organisation with made-up names and may differ slightly as BondiByte is updated.
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