

Client Charts history

Look back over what has been recorded on a client's Charts. Choose a Chart and a period, read the entries in date order and open any entry.

WHO IT IS FOR Owner, Admin, Manager, Coordinator	TIME NEEDED About 6 minutes	LAST REVIEWED 2 October 2026
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Who this is for

Permissions: You need **Can view client charts** to open the **Charts** tab, and **Can view chart entries** to see the entries. Owners, Admins, Managers and Coordinators have both by default. A manager limited to certain sites sees only the clients at their own sites.

Before you begin

- You are signed in to BondiByte on a computer.
- The client has at least one Chart assigned to them. See [Assign a Chart to a client](#).
- Staff have recorded entries on the Staff App. Entries are recorded by staff when they write a report for a shift, so the history grows as staff work.



Steps

1 Go to **Clients** > the client's record

- 1 In the left menu, choose **Clients**. The **Client Records** list opens.
- 2 Choose the name of the client whose Charts you want to look at. Their record opens.

The screenshot shows the BondiByte interface. On the left, the 'Clients' menu item is highlighted with a red circle and a '1'. The main area displays a list of clients under the heading 'Client Records'. The table has columns for Name, Status, Active, and Actions. The client 'Mason Ibrahim' is highlighted with a red circle and a '2'.

NAME	STATUS	ACTIVE	ACTIONS
Noah Bennett Noah	Active	Active	Deactivate
Ruby Chen Ruby	Active	Active	Deactivate
Chloe Davis Chloe	Active	Active	Deactivate
Mason Ibrahim Mason	Active	Active	Deactivate
Ethan Kaur Ethan	Active	Active	Deactivate
Daniel Mensah Dan	Active	Active	Deactivate
Lucas Miller Luke	Active	Active	Deactivate
Grace O'Connor Grace	Active	Active	Deactivate
Henry Roberts Henry	Active	Active	Deactivate
Avery Sample -	Active	Active	Deactivate
Isla Taylor Isla	Active	Active	Deactivate
Amelia Watson			

Choose **Clients** in the left menu (1), then the client's name (2).



2 Open the **Charts** tab

- 1 On the client's record, choose the **Charts** tab.

The tab has two sections. **Client Chart setup** lists the Charts assigned to this client, with their **Status** and **Effective from** date. **Chart entries**, further down, lists every entry recorded against those Charts. This guide is about **Chart entries**.

The screenshot shows the client record page for Mason Ibrahim. The 'Charts' tab is selected and highlighted with a blue box and a circled '1'. The 'Client Chart setup' section is visible, showing a table with one chart entry: 'Sample Fluid Chart' with status 'Active' and effective from date '02/10/2026 (version 2)'. The table has columns for NAME, STATUS, and EFFECTIVE FROM. The page also includes a 'Back to Clients' link, an 'Edit client' button, and a '+ Add chart' button.

NAME	STATUS	EFFECTIVE FROM
Sample Fluid Chart	Active	02/10/2026 (version 2)

Choose the **Charts** tab (1). **Chart entries** is the section further down.



3 Choose the Chart and the period

Scroll down to **Chart entries**. Two filters sit above the table.

- 1 In **Chart**, choose **All charts** to see the entries of every Chart, or choose one Chart by name to see only its entries.
- 2 In **Range**, choose how far back to look. The list is **Last 7 days**, **Last 30 days**, **Last 90 days** and **Custom**.
- 3 If you chose **Custom**, a **From** field appears. Choose the first day you want to see.
- 4 A **To** field also appears. Choose the last day you want to see.

The table updates as soon as you change a filter, and returns to its first page.

Chart: A list that starts on **All charts**. It then lists each Chart assigned to this client by the name shown in **Client Chart setup**, including a Chart that is Inactive, so you can still read its history. Choosing a Chart shows only that Chart's entries.

Range: A list that starts on **Last 30 days**. **Last 7 days**, **Last 30 days** and **Last 90 days** count back from today and include today.

Custom shows two date fields so you can pick your own period, for example the weeks before a review.

From: Appears only when **Range** is **Custom**. The first day of the period. It starts 30 days before today. It cannot be later than the **To** date.

To: Appears only when **Range** is **Custom**. The last day of the period, included. It starts on today's date. It cannot be earlier than the **From** date.

Chart entries

Every entry recorded against this client's charts.

Chart 1

Range 2

From 3

To 4

DATE	CHART	SHIFT	RECORDED BY
02/10/2026	Sample Fluid Chart	Afternoon Shift - 02/10/2026	Demo User

Choose the Chart (1) and the range (2). With Custom, choose the first day (3) and the last day (4).



4 Read the Chart entries table

Choose **Last 30 days** again in **Range** if you want to follow the next steps on the same screen. The table lists the entries, newest first.

- 1 Read each row from left to right, under the headings **Date**, **Chart**, **Shift** and **Recorded by**.
- 2 Check the line under the table. It says which entries you are looking at, for example **1-4 of 4 chart entries**. Use **Back** and **Next** to move between pages.

Date: The day the entry was recorded.

Chart: The name of the Chart the entry belongs to, as shown in **Client Chart setup**.

Shift: The shift the entry was recorded against, shown as the shift's name and date, for example **Afternoon Shift - 02/10/2026**. It says **No shift** when the entry is not linked to a shift.

Recorded by: The name of the person who recorded the entry.

Actions (three dots): Opens the menu for that entry. **View** is always there. **Edit** and **Deactivate** are offered only to people who can manage chart entries.

Rows: How many entries each page can hold. Choose 50, 100 or 200 from the list.

Back and Next: Move to the previous or the next page when there are more entries than fit on one page. **Back** is greyed out on the first page and **Next** on the last page.

Note: The table lists active entries only. An entry that has been deactivated no longer appears, and it is not counted in the line under the table.

Chart entries

Every entry recorded against this client's charts.

Chart

Range

All charts

Last 30 days

DATE	CHART	SHIFT	RECORDED BY
02/10/2026	Sample Fluid Chart	Afternoon Shift - 02/10/2026	Demo User
02/10/2026	Sample Fluid Chart	Afternoon Shift - 02/10/2026	Demo User
02/10/2026	Sample Fluid Chart	Afternoon Shift - 02/10/2026	Demo User
02/10/2026	Sample Fluid Chart	Morning shift short - 02/10/2026	Demo User

Rows

50

Back

1-4 of 4 chart entries

Next

Read each row under its headings (1), then check the count and page buttons under the table (2).



5 Open an entry

- 1 On the row of the entry you want to read, choose the actions button (three dots).
- 2 Choose **View**. The entry opens in a window on the right of the screen.

The screenshot shows a web interface titled "Chart entries" with the subtitle "Every entry recorded against this client's charts." Below this is a filter section with "Chart" set to "All charts" and "Range" set to "Last 30 days". A table with four columns: "DATE", "CHART", "SHIFT", and "RECORDED BY" displays four entries. The first entry is highlighted, and a dropdown menu is open next to its "RECORDED BY" cell, showing options: "View", "Edit", and "Deactivate". The "View" option is highlighted. At the bottom of the table, there is a "Rows" dropdown set to "50" and pagination controls showing "1-4 of 4 chart entries" with "Back" and "Next" buttons.

DATE	CHART	SHIFT	RECORDED BY
02/10/2026	Sample Fluid Chart	Afternoon Shift - 02/10/2026	Demo User
02/10/2026	Sample Fluid Chart	Afternoon Shift - 02/10/2026	Demo User
02/10/2026	Sample Fluid Chart	Afternoon Shift - 02/10/2026	Demo User
02/10/2026	Sample Fluid Chart	Morning shift short - 02/10/2026	Demo User

Choose the actions button on the entry's row (1), then View (2).



6 Read the entry

The window is headed with the Chart's name.

- 1 Read the line under the heading. It gives the date and time the entry was recorded and who recorded it, for example **02/10/2026 07:37 pm – Recorded by** the person's name.
- 2 Read the answers. Each question from the Chart is listed with the answer that was recorded. A question that was not answered shows a dash.

Choose **Close**, or the cross at the top right of the window, when you have finished. The table behind it is unchanged.

Answers: Shown in the order of the Chart. A choice shows the option's name, a Yes or No question shows **Yes** or **No**, a date shows the day, and a table question lists its rows. The window shows the entry as it was recorded, using the questions and options the Chart had at that time, even if the Chart has been changed since.

	Sample Fluid Chart ×								
	02/10/2026 07:37 pm - Recorded by Demo User 1								
	<table><thead><tr><th>TIME</th><th>DRINK</th></tr></thead><tbody><tr><td>17:30</td><td>Diluted cordial</td></tr><tr><th>AMOUNT (ML)</th><td></td></tr><tr><td>180</td><td></td></tr></tbody></table> 2	TIME	DRINK	17:30	Diluted cordial	AMOUNT (ML)		180	
TIME	DRINK								
17:30	Diluted cordial								
AMOUNT (ML)									
180									

The line that says when the entry was recorded and by whom (1), and the answers (2).

What happens next

Looking at the history changes nothing. Use **View** as often as you like.

To correct an answer that was recorded wrongly, or to remove an entry that should not be there, see View and correct Chart entries.

To keep a copy of a period's entries as a document, see Export a Chart as PDF.

To look across all your clients at once, choose **Charts** under **Registers** in the left menu. It lists entries for every client you can see and has the same **Range** list, with **Client** and **Chart** lists to narrow it down. The menu item is shown to people whose role includes **Can view chart entries**.

Important notes

Important: A client's history belongs to that client's own Charts only. An entry is never shared between clients, and a Chart assigned to one client does not show anything for another client.



Good practice

- Use **Custom** to match the period you are reviewing, for example the weeks since the last review meeting, instead of reading the default 30 days and scrolling.
- When a client has several Charts, choose one in **Chart** before you read the table. Entries from different Charts then never get mixed up when you check a pattern, such as drinks over a week.
- Look at the **Shift** column when something needs checking. It tells you which shift the entry belongs to, so you can ask the right team member or look at that shift on the roster.
- If the table looks short, check the **Range** list before anything else. The default is only the last 30 days, and entries from earlier are not listed until you choose **Last 90 days** or **Custom**.

Troubleshooting

The table says **No entries in this range**.

Why it happens: No entry was recorded in the period you chose, or the **Chart** filter is set to a Chart that has no entries in that period. Entries that were deactivated are not listed.

What to do: Choose **Last 90 days** or **Custom** and widen the dates, and set **Chart** to **All charts**. If staff say they have recorded entries, check that the Chart is Active in **Client Chart setup**, because staff can only record on an Active Chart.

The Charts tab says **You do not have permission to view this client's charts**.

Why it happens: Your role does not include permission to view client charts.

What to do: Ask an Owner or Admin to check your role.

I cannot find a client that a colleague can see.

Why it happens: A manager whose access is limited to certain sites sees only the clients at their own sites.

What to do: Ask an Owner or Admin to check which sites you manage, or to look at the history for you.

I cannot see **Charts** in the left menu under **Registers**.

Why it happens: The menu item is shown only to people whose role includes **Can view chart entries**.

What to do: Ask an Owner or Admin to check your role. The **Chart entries** table on a client's **Charts** tab needs the same permission, so it will not list entries for you either.

An entry I expected is not in the list.

Why it happens: It may be in another Chart, outside the period, or it may have been deactivated. An entry is also listed only for the client it was recorded for.

What to do: Set **Chart** to **All charts**, widen the **Range**, and check that you have the right client open.

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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