

Clone a built-in Chart template

Copy one of BondiByte's built-in Chart templates into your organisation, name it, and activate it so it is ready to assign to a client.

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

Permissions: You need permission to manage chart templates. Owners and Admins have it by default. Without it, the Clone and Activate buttons in the Chart Library are greyed out.

Before you begin

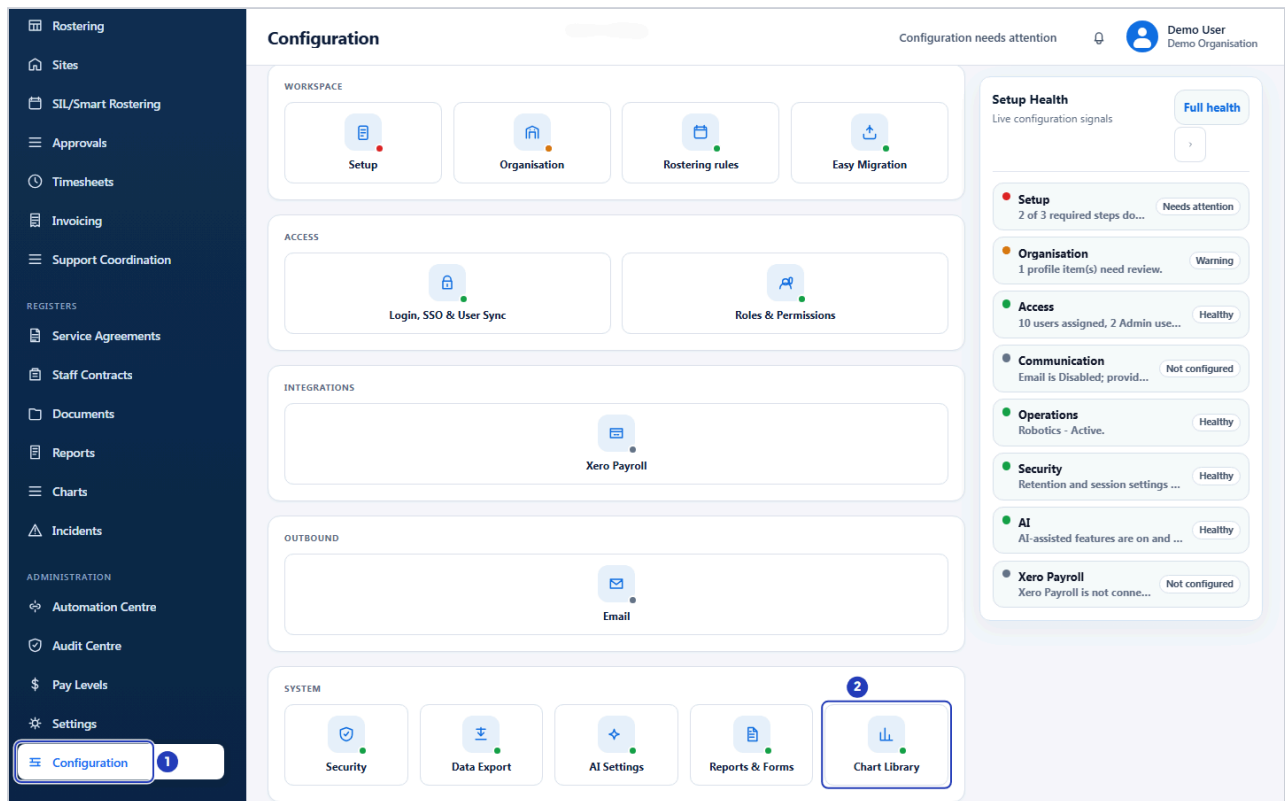
- You are signed in to BondiByte on a computer.
- You know which built-in template is closest to the record you want to keep. The five built-in templates are Behaviour Monitoring, Food & Fluid, General Observation, Medication Administration and Sleep Monitoring.



Steps

1 Go to Configuration > Chart Library

- 1 In the left menu, under Administration, choose **Configuration**. The Configuration page opens.
- 2 Under **System**, choose **Chart Library**. The **Chart Library Settings** page opens.



Choose Configuration in the left menu (1), then Chart Library under System (2).



2 Open the **Built-in templates** tab

- 1 Choose the **Built-in templates** tab. The five BondiByte templates are listed, each marked **Built-in**.
- 2 Find the template closest to what you need, for example **Food & Fluid**. Choose **Preview** on its row to look at it first.

Note: A built-in template cannot be edited, and it cannot be given to a client directly. You always clone it first, then use your copy.

Organisation templates 1 Built-in templates 5 1

Built-in templates

Ready-to-use BondiByte chart templates available to every organisation. Preview a template, or clone one to customise it for your organisation.

TEMPLATE	STAFF MOBILE APP	
Behaviour Monitoring Built-in BondiByte starter template. Clone it to customise and use it with your clients.	Clone to use on mobile	Preview Clone
Food & Fluid Built-in BondiByte starter template. Clone it to customise and use it with your clients.	Clone to use on mobile	2 Preview Clone
General Observation Built-in BondiByte starter template. Clone it to customise and use it with your clients.	Clone to use on mobile	Preview Clone

Choose the **Built-in templates** tab (1), then **Preview** on the template you are interested in (2).



3 Preview the template

- 1 Look through the fields the template includes. The preview shows how the form looks and does not save any answers.
- 2 Choose **Desktop width** or **Narrow width** to check how the form lays out on a narrower screen.
- 3 Choose **Close** when you have finished.

Preview: Food & Fluid
This is how the report form looks. Preview does not save any answers.

2

Desktop width Narrow width

Food & fluid 1

TIME *

MEAL OR DRINK *

DESCRIPTION

AMOUNT TAKEN

FLUID AMOUNT (ML)

NOTES

3 Close

Look through the fields (1), check the layout with the width buttons (2), then choose Close (3).



4 Clone the template

On the row of the template, choose **Clone**. A window opens with the title **Duplicate** followed by the template's name.

- 1 In **Name for the copy**, type a name your team will recognise. It starts as the original name with (Copy) added.
- 2 In **Description**, replace the starter wording with what your organisation uses this Chart for.
- 3 Choose **Create copy**. Choose **Cancel** instead to close the window without creating anything.

Name for the copy: Required. It starts as the original name with (Copy) added. Each Chart template in your organisation needs its own name. A name that differs only in capital letters counts as the same name, and the name of an archived template counts too. **Create copy** stays greyed out while the box is empty.

Description: Optional. It starts with the original template's description, which is BondiByte's starter wording for a built-in template. Replace it with what your organisation uses the Chart for. It helps your team choose the right template later.

Duplicate "Food & Fluid"

The copy starts with all the fields of the original and belongs to your organisation.
Name it before it is created.

1 Name for the copy

Sample Meal Chart

2 Description

Sample Chart for the BondiByte guides. Records a meal or drink at a point in time.

3

Cancel Create copy

Name the copy (1), describe it (2), then choose Create copy (3).



5 Check the copy in Organisation templates

A message confirms that the template was cloned. The copy now belongs to your organisation.

- 1 Choose the **Organisation templates** tab.
- 2 Find your copy in the list. Its **Status** is **Draft**, **Assigned to** says **Not assigned to a client yet**, and its **Staff mobile app** switch is off.

The screenshot shows the 'Organisation templates' tab selected. A table lists the templates. The first row, 'Sample Meal Chart', has a status of 'Draft', is not assigned to a client, and has the 'Staff mobile app' switch turned off. The 'Updated' column shows '02/10/2026 05:21 pm'. Action buttons 'Edit', 'Preview', 'Clone', 'Activate', and 'Archive' are visible for this row. A 'Start from scratch' button is in the top right. A 'Back' button and 'Next' button are at the bottom right of the table.

NAME	STATUS	VERSION	ASSIGNED TO	STAFF MOBILE APP	UPDATED	
Sample Meal Chart	Draft	-	Not assigned to a client yet	☐	02/10/2026 05:21 pm	Edit Preview Clone Activate Archive

Choose the Organisation templates tab (1) and find your copy, shown as a Draft (2).

6 Activate the copy

On the row of your copy, choose **Activate**. A window asks **Activate this chart template?**

- 1 Read the message. Activating creates version 1 and makes the template available to assign to clients. Entries recorded later keep the version they were recorded on.
- 2 Choose **Activate** to confirm. Choose **Cancel** to keep the copy as a Draft.

Tip: To change the fields before you activate, choose **Edit** on the row instead. The **Edit** button opens the Chart template builder. See Create an organisation Chart template.

The dialog box has a title bar with a warning icon and the text 'Activate this chart template?'. A 'Close' button is in the top right. The main content area contains a message: 'Activating creates version 1 and makes it available to assign to clients. Entries already recorded keep their original version.' At the bottom, there are two buttons: 'Activate' (highlighted with a red box) and 'Cancel'.

Read what activating does (1), then choose Activate (2).



7 Check that the template is Published

- 1 A message confirms that the template was activated as version 1.
- 2 In the row, the **Status** is now **Published** and the **Version** is **v1**.
- 3 The row now offers **Assign to client**. Use it to give the Chart to a client.

Configuration

1 Confirm "Sample Meal Chart" activated as version 1.

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.

Organisation templates 1 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 Meal Chart	2 Published	v1	Not assigned to a client yet	☐	02/10/2026 05:32 pm	Edit	Preview	Deactivate	3 Assign to client	Clone Archive

Rows 50

Back 1-1 of 1 organisation chart templates Next

The confirmation message (1), the Published status and version (2), and the new Assign to client button (3).

What happens next

Your copy belongs to your organisation. The built-in template it came from is unchanged, and other organisations never see your copy.

Cloning does not give the Chart to anyone. A Chart is only available on the Staff App for the clients it is assigned to, once it is active. The next step is Assign a Chart to a client.

To change the fields of your copy, choose **Edit** on its row in **Organisation templates**. Changes you save are kept as a draft until you publish them, and each publish makes a new version. Entries already recorded keep the version they were recorded on.

Important notes

Important: A built-in template cannot be edited or assigned to a client. The **Built-in templates** tab offers only **Preview** and **Clone**.

Tip: To start with no template, use **Start from scratch** on **Organisation templates**. See Create an organisation Chart template.



Good practice

- Preview a built-in template before you clone it, and choose **Edit** on your copy to adjust its fields before you activate it. Each change you publish later creates a new version.
- Name the copy for what it records, for example Fluid intake (Riverside house), instead of keeping (Copy) in the name. Names must be unique, archived templates included.
- If you clone **Medication Administration**, its medication or dose list is set for each client, so add that client's options when you assign the Chart.

Troubleshooting

The **Clone** button is greyed out.

Why it happens: Your role does not include permission to manage chart templates.

What to do: Ask an Owner or Admin to clone the template for you, or to check your role.

The Chart Library says **You do not have permission to view the Chart Library**.

Why it happens: Your role does not include permission to view chart templates.

What to do: Ask an Owner or Admin to give you the Chart Templates permission.

A message says **A chart template with this name already exists in your organisation**.
Choose a different name.

Why it happens: Every Chart template needs its own name, and the name of an archived template counts.

What to do: Type a different name in **Name for the copy**. To find an archived template, turn on **Show archived** on **Organisation templates**.

I cannot find my copy after choosing **Create copy**.

Why it happens: The page stays on the **Built-in templates** tab. Your copy is on the other tab.

What to do: Choose the **Organisation templates** tab.

There is no **Assign to client** button on my copy.

Why it happens: Only a template with the status **Published** can be assigned. A new copy is a Draft.

What to do: Choose **Activate** on the row, then confirm.

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.
Last reviewed 2 October 2026.*