

Complete a report

Add a report from a form on the Reports page. Choose the form and the client, answer the questions and save the report.

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

Permissions: You need permission to create reports (Can create notes). Owners, Admins, Managers and Coordinators have it by default. If your access is limited to certain sites, you only see and report on records within your own sites.

Before you begin

- You are signed in to BondiByte on a computer.
- The form you want to use is published. BondiByte templates are always available. For your own forms, see [Publish a form](#).
- The client the report is about is already in BondiByte.



Steps

1 Go to Reports > Add report

- 1 In the left menu, choose **Reports**. The **Reports** page lists the reports your organisation has recorded.
- 2 At the top right of the list, choose **Add report**. The **Choose report type** window opens.

The screenshot shows the BondiByte Reports page. The left sidebar has a 'Reports' menu item highlighted with a blue circle and a '1' badge. The main content area shows a list of reports with columns: REPORT, TYPE, RECORD, DATE, and STATUS. The 'Add report' button is highlighted with a blue circle and a '2' badge.

REPORT	TYPE	RECORD	DATE	STATUS
Initial site note	Site Note	SITE Sunrise Supported Living Home	14/06/2026	Active
Initial client progress note	Client Progress	CLIENT Daniel Mensah	14/06/2026	Active
Initial staff profile note	General	STAFF Sarah Johnson	14/06/2026	Active
Shift report	Client Shift Report	CLIENT Chloe Davis	11/09/2026	Active
Shift report	Client Shift Report	CLIENT Chloe Davis	11/09/2026	Active
Shift report	Client Shift Report	CLIENT Chloe Davis	11/09/2026	Active
Shift report	Client Shift Report	CLIENT Noah Bennett	19/05/2026	Active
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Choose Reports in the left menu (1), then Add report (2).



2 Choose the form

- 1 Check that **Report context** is **Client**. The options are **Staff**, **Client**, **Site** and **Shift**, and they decide which report types are listed. Your organisation's own forms are offered for **Client** only.
- 2 In **Search report types**, type part of the form's name or description, for example Sample Daily. If nothing matches, the list says **No report types match your search**.
- 3 Under **Organisation templates**, choose the form. When the search box is empty, a **Recently used** group at the top lists the last few forms you chose on this computer, and the **BondiByte templates** group comes before **Organisation templates**.

Note: Forms that your organisation created and published are tagged **Organisation**. The ready-made BondiByte forms are tagged **BondiByte** and work in the same way. The description under a form's name is the one set when the form was created.

Check the report context (1), search for the form (2) and choose it (3).



3 Choose who the report is about

The **Add report** window opens with the form's questions.

- 1 Check that **Owner type** is **Client**.
- 2 In **Owner**, choose the client the report is about.
- 3 Change the **Title** if you want to, for example to add the date. It starts as the form's name.

Report type shows the name of the form you chose. You cannot type in it. To use a different form, choose **Change type** at the bottom of the window.

Tip: If you chose the wrong form, choose **Change type** at the bottom of the window to go back to the list of forms.

The screenshot shows the 'Add report' window with the following fields and values:

- Owner type:** Client (indicated by a blue circle 1)
- Owner:** Ruby Chen (indicated by a blue circle 2)
- Report type:** Sample Daily Check
- Title:** Daily check 2 October (indicated by a blue circle 3)

Below the form fields, there is a section titled 'Sample Daily Check' with the description: 'A quick daily check of a house. A sample form for this guide.'

Check the owner type (1), choose the client (2) and change the title if you want to (3).



4 Fill in the form

- 1 Answer each question. In the example form, type who did the check in **Checked by**.
- 2 Choose the **Date of check**.
- 3 Choose an answer for **Everything in order?**
- 4 Choose the **Area checked**.
- 5 Add anything else in **Notes**.

Questions marked required: Must be answered before the report can be created. Required questions are not marked in this window. To see which questions a form requires, check its **Preview** in **Reports & Forms**, where a star marks each one. If you leave one empty, your browser stops you and shows which question needs an answer. For an answer your browser cannot check, BondiByte shows a message at the top of the window, such as **Complete the required field: Checked by**.

Choice questions: Choose one of the options the form's author set up. A multiple choice question lets you choose more than one.

Date questions: Choose a date from the calendar or type it.

Details

Checked by1
Casey Sample

Date of check2
02/10/2026

Everything in order?3
Yes

Area checked4
Kitchen

Notes5
All checks complete. Nothing to follow up.

Create

Change type

Cancel

Answer each question, from Checked by (1) to Notes (5).



5 Choose **Create** and check the new report

Choose **Create** at the bottom of the window. Choose **Cancel** instead to close the window without saving.

- 1 A message confirms **Report created**.
- 2 The new report appears in the **Reports** list, with the form's name under **Type** and the client under **Record**.

The screenshot shows the 'Reports' page. At the top right, a message box with a green checkmark and the text 'Report created.' is displayed, with a circled '1' next to it. Below the message, the 'Reports' section has a search bar, filters for 'All owners' and 'All types', an 'Include inactive' checkbox, and an '+ Add report' button. A table lists reports with columns: REPORT, TYPE, RECORD, DATE, and STATUS. The table contains four rows: 'Initial site note' (Site Note, SITE Sunrise Supported Living Home, 14/06/2026, Active), 'Initial client progress note' (Client Progress, CLIENT Daniel Mensah, 14/06/2026, Active), 'Initial staff profile note' (General, STAFF Sarah Johnson, 14/06/2026, Active), and 'Daily check 2 October' (Sample Daily Check, CLIENT Ruby Chen, 02/10/2026, Active). The 'Daily check 2 October' row is highlighted with a circled '2'.

REPORT	TYPE	RECORD	DATE	STATUS
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Initial client progress note	Client Progress	CLIENT Daniel Mensah	14/06/2026	Active
Initial staff profile note	General	STAFF Sarah Johnson	14/06/2026	Active
Daily check 2 October	Sample Daily Check	CLIENT Ruby Chen	02/10/2026	Active

A message confirms the report is created (1) and the new report is in the list (2).

What happens next

The report is saved against the client you chose. It stays in the **Reports** list, where you can search for it. Search finds words in the title and in the answers, and it finds the name of a BondiByte report type.

To read a report, choose its title, or open the three dots menu on its row and choose **View**. To change it, choose **Edit** from the same menu. To keep a copy, see Download a report PDF.

A report made from one of your organisation's forms keeps the version of the form it was completed on. If the form is changed and published again later, reports already completed still read the way they were written.

Support workers complete reports themselves in the Staff App. Reports they submit appear in this same list.

Important notes

Important: A form in the **Incident** category belongs to the Incidents area and is not offered here. Record those from the **Incidents** page instead.



Good practice

- Add the date or the house name to the **Title**, for example **Daily check 2 October**. The **Reports** list shows the title first, and search finds words in the title and in the answers.
- Check the client and the answers before you choose **Create**. If something needs changing afterwards, use **Edit** from the row menu, and download the PDF again if you had already saved one, because a PDF shows the report as it was when you downloaded it.
- Choose the form with the right name, not one that is nearly right. Use the **Recently used** group or the search box, and read the description under the name to be sure it is the form you want.

Troubleshooting

I cannot see the Add report button.

Why it happens: Your role does not include permission to create reports.

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

My organisation's form is not in the list of forms.

Why it happens: The form is not published, its category is **Incident**, or **Report context** is not **Client**. Forms that your organisation created are offered for client reports.

What to do: Set **Report context** to **Client**. In **Reports & Forms**, check that the form is published and that its category is not **Incident**. Then try again.

A message such as Please fill out this field. appears beside a question.

Why it happens: The question is marked required in the form, and it is empty.

What to do: Answer the question the message points to, then choose **Create** again.

A message at the top of the window says

Complete the required field: ... followed by a question name.

Why it happens: A question marked required has no answer, and your browser could not check it.

What to do: Answer each question named in the message, then choose **Create** again.

The client I want is not in the Owner list.

Why it happens: The list shows only the clients your role can see. If your access is limited to certain sites, clients outside those sites are not listed.

What to do: Ask an Owner or Admin to check your access, or to add the report for you.

I chose the wrong form after opening the report window.

Why it happens: The form is chosen before the questions are shown.

What to do: Choose **Change type** at the bottom of the window to go back to the list of forms. Your answers to the old form's questions are not kept.

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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