

Create an organisation Chart template

Build your own Chart template in the Chart Library, add its fields, choose where choices come from, and publish it so it can be assigned to a client.

WHO IT IS FOR Owner, Admin	TIME NEEDED About 15 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, Start from scratch, Edit and Publish are not available to you.

Before you begin

- You are signed in to BondiByte on a computer.
- You know what the Chart should record each time, for example a time, a drink and an amount. A Chart records the same structured observation again and again for one client.



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 Start a new template

On the **Organisation templates** tab, choose **+ Start from scratch**. A window titled **Start from scratch** opens.

- 1 In **Chart template name**, type a name your team will recognise.
- 2 In **Description**, say what the Chart records.
- 3 Choose **Create and open builder**. Choose **Cancel** instead to close the window without creating anything.

Chart template name: Required. 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. The **Create and open builder** button stays greyed out until you type one.

Description: Optional. It helps your team choose the right template later. You can read and change it later in the builder by choosing **Show description**.

Start from scratch
Start a blank chart template. You can add sections and fields in the builder next.

Chart template name 1
Sample Fluid Chart

Description 2
Sample Chart for the BondiByte guides. Records a drink, how much was taken and when.

3
Cancel Create and open builder

Type a name (1), describe the Chart (2), then choose Create and open builder (3).



3 Add a Time field

The builder opens with a new Draft template. The **Add a field** list is on the left, your Chart is in the middle, and the settings of the selected field are on the right.

- 1 In **Add a field**, choose **Time**. The field is added to the Chart and its settings open.
- 2 In **Label**, type the name the Chart form shows for this field, for example Time.
- 3 Turn on **Required** if the field must always be answered.

Label: Required. The name shown on the Chart form, up to 200 characters. A counter under the box shows how many you have used. For **Section heading** and **Info text** fields the box is called **Text**.

Key: A short name that BondiByte makes for you, for example question1. Leave it as it is, or choose **Regenerate from label** to make it match the label. It must start with a lowercase letter, use only letters and numbers, be 2 to 60 characters long and differ from the other fields in the template, otherwise a message appears under the box.

Required: A switch, off to start with. When it is on, a red star appears next to the label and the field must be answered every time the Chart is recorded. **Section heading** and **Info text** fields do not have it.

Help text: Optional guidance for the person filling in the Chart, up to 500 characters. It appears under the field.

The screenshot shows the 'Sample Fluid Chart' builder interface. On the left, the 'Add a field' list is open, showing various field types under 'BASIC' and 'CHOICE'. The 'Time' field is selected, indicated by a blue circle and the number 1. In the center, the 'Details' section shows a preview of the 'Time' field with a label 'Time' and a red star, indicating it is required. On the right, the 'Field settings' panel is open, showing the 'Label' field with the text 'Time' and a character count of 4/200, indicated by a blue circle and the number 2. Below the label, the 'Key' field is set to 'question1', and the 'Required' toggle is turned on, indicated by a blue circle and the number 3.

Choose Time in the Add a field list (1), type the label (2) and turn on Required (3).



4 Add a choice field

- 1 In **Add a field**, choose **Single choice**.
- 2 In **Label**, type Drink, and turn on **Required** if you want.
- 3 Under **Where do the choices come from?**, choose **Configure choices for each client**.

A Single choice field has the same **Label**, **Key**, **Required** and **Help text** settings as the Time field, plus the ones below.

Where do the choices come from?: A list that starts on **Same choices for everyone**. That value means you type the options in the template and every client uses the same list. **Configure choices for each client** leaves the list empty here, and you add each client's own options when you assign the Chart. The list is offered for Single choice and Multiple choice fields, and for choice columns in a Table.

Options: The answers a person can pick. With **Same choices for everyone**, choose **+ Add option** for each answer and type its label and its value, up to 30 options. Use the cross button on an option's row to remove it. The Chart cannot be published while such a field has no options. With **Configure choices for each client**, leave Options empty. The message **No options yet. Add at least one.** can stay, and the Chart can still be published.

Default value: Optional. A list that starts on **No default** and offers the options you have typed.

Note: **Same choices for everyone** is the default. You type the options in the field settings and every client uses them. **Configure choices for each client** leaves the list empty here. You add the options for each client when you assign the Chart. See Fixed and client-specific choices.



Choose *Single choice* (1), type the label (2), then choose *Configure choices for each client* (3).

5 Add a Number field

- 1 In **Add a field**, choose **Number**.
- 2 In **Label**, type Amount (mL).

Tip: To keep your work and finish later, choose **Save draft** at the top right. The template stays a Draft until you publish it. **Save draft** is greyed out until you change something.

Choose *Number* (1) and type the label (2).



6 Set the optional field settings

Choose a field in the Chart to open its settings on the right. The settings below are optional, and each is offered only for the field types it suits.

Placeholder: Example text shown inside an empty field in the builder and in **Preview**. It is offered for Short text, Long text, Number, Date, Time, Date and time and People fields.

Default value: A starting answer shown in the builder and in **Preview**. Short text and Long text take text, Number takes a number, and Date, Time and Date and time take a date or time. Yes / No and Checkbox offer **Checked by default**. Single choice offers a list. People, Table, Multiple choice, Section heading and Info text have no starting answer.

Conditional display: Starts with **Configure**. Choose it, then choose another field in the Chart, shown as the section name followed by the field's label, and a comparison, **is equal to, is not equal to, is Yes / checked or is No / unchecked**. For the first two, type the value to compare with. In **Preview**, the field is then shown only when the comparison is true. The list starts on **No condition (always show)**. Choose **Cancel** to close it without a condition.

Delete field: A red button at the bottom of the settings. A window asks **Delete this field?**. Choose **Delete field** to remove the field and its settings, or **Cancel** to keep it. You cannot change a field's type after you add it, so delete the field and add a new one instead.

7 Organise the Chart with sections and other field types

The **Add a field** list is grouped. **Basic** holds Short text (one line of text), Long text (a multi-line box), Number, Date, Time (a time of day with no date), Date and time, Yes / No and Table (a repeating grid of rows with the columns you define). **Choice** holds Single choice (one option from a list), Multiple choice (one or more options) and Checkbox (a single tick box). **People & records** holds People, which picks a staff member or client. **Layout** holds Section heading and Info text, which are guidance for the person filling in the Chart and are not questions.

A new field is added to the section named under **Add a field**, which starts as **Details**. Type in a section's title box to rename it, and use the **Section help text (optional)** box for a short note. To add another section, choose **+ Add section** under the Chart.

Each section has a three-dot menu with **Move up, Move down, Duplicate section** and **Delete section**. A section that holds fields asks **Delete this section?** first, because deleting it deletes its fields too. Each field has a three-dot menu with **Move up, Move down, Duplicate field** and **Delete field**. You can also drag a field or a section by its handle.



8 Preview the template

At the top right of the builder, choose **Preview**. A window titled **Preview** followed by the template's name opens.

- 1 Look through the fields in order. An asterisk (*) marks a required field. The preview 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** to go back to the builder.

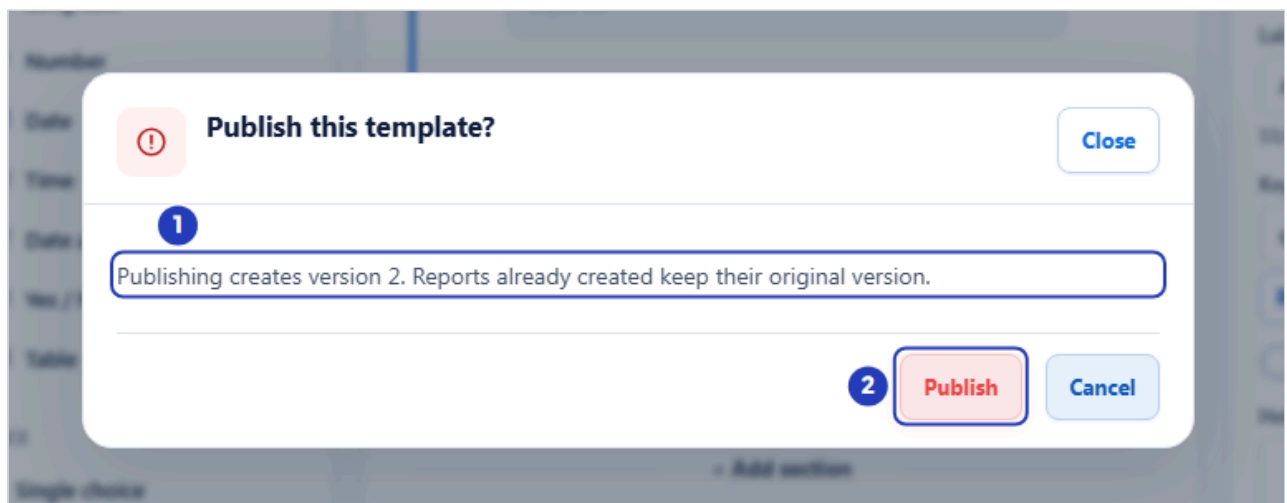
To read or change the description you typed in step 2, choose **Show description** under the template's name.

9 Publish the template

At the top right of the builder, choose **Publish**. A window asks **Publish this template?**

- 1 Read the message. It says that publishing creates a version of the template, and that anything already recorded keeps its original version.
- 2 Choose **Publish** to confirm. Choose **Cancel** to keep working.

Note: If a box headed **1 issue to fix before publishing** appears under the title (the number may be higher), the list inside it says what to change. You cannot publish until each issue is fixed.



Read what publishing does (1), then choose Publish (2).



10 Check that the template is Published

- 1 A message confirms that the template was published.
- 2 The **Chart Library** opens on **Organisation templates**. In your row, the **Status** is **Published** and the **Version** is **v1**.
- 3 The row now offers **Assign to client**. Use it to give the Chart to a client.

Note: The **Version** column shows the version that was created.

Configuration

1 → Published as version 2.

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 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	Published	v1	Not assigned to a client yet	☐	02/10/2026 05:53 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

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

What happens next

Your template is Published as version 1 and is listed in **Organisation templates**. It is not yet available 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 to give the Chart to a client. Choose **Assign to client** on the row, or use **+ Add chart** on the client's **Charts** tab. See Assign a Chart to a client.

To change the template later, choose **Edit** on its row. Your changes are saved as a draft, and publishing them creates the next version. Entries already recorded keep the version they were recorded on.

Important notes

Important: A Chart template is not a form. A form is an organisation-wide template that staff can use without any client assignment. A Chart template is a design that does nothing until it is assigned to a client, activated for that client and shown on the Staff App.

Tip: To start from one of BondiByte's ready-made templates instead, see Clone a built-in Chart template.



Good practice

- Choose **Preview** before you choose **Publish**. A published template changes only by publishing a new version, so check the fields, their order and which ones are required first.
- Use **Configure choices for each client** only for lists that really differ between clients, such as the drinks one client prefers. Type a list that is the same for everyone once, in the template. Every client then needs at least one option in each client-specific list before the Chart can be activated.
- Put what staff need to know in each field's **Label** and **Help text**, and keep labels short and clear, for example Amount (mL). On the Staff App each field shows its label, a star when it is required, and its help text.
- Turn on **Required** only for answers needed every time. Staff cannot save a Chart entry on the Staff App until every required field is answered.

Troubleshooting

The **Create and open builder** button is greyed out.

Why it happens: The **Chart template name** box is empty.

What to do: Type a name, then choose **Create and open builder**.

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

Why it happens: Every Chart template in your organisation needs its own name. The name may belong to a template that has been archived.

What to do: Type a different name. To look for an archived template, open **Organisation templates** and turn on **Show archived**.

The builder shows **issue to fix before publishing**, for example **needs at least one option**.

Why it happens: A **Single choice** or **Multiple choice** field set to **Same choices for everyone** has no options.

What to do: Choose the field, then choose **+ Add option** and type the options. Or change **Where do the choices come from?** to **Configure choices for each client**.

A message says **Fix the highlighted issues before publishing**.

Why it happens: The template still has an issue listed under its title.

What to do: Fix each issue in the list, then choose **Publish** again.

A window asks **Discard unsaved changes?** when I go back to the Chart Library.

Why it happens: You have changed the template since you last saved.

What to do: Choose **Cancel**, then choose **Save draft** and go back again. Choose **Discard and leave** only if you do not need the changes.

Need more help?

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

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