

The Reports & Forms library

Understand the Reports & Forms library, where your organisation keeps its forms, and how forms, versions, the Staff App and completed reports fit together.

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: Seeing the library needs the Can view report templates permission, and changing it needs Can manage report templates. Owners and Admins have both by default. Adding and reading reports needs the permissions to create and view notes, which Owners, Admins, Managers and Coordinators have by default.

What Reports & Forms is

Reports & Forms is where your organisation manages the forms it uses to record structured information, such as shift reports, progress notes and your own checklists. You find it in **Configuration**, under **System**.

A form, which the library calls a template, is a set of questions. Someone fills it in to make a report. The completed reports are not kept here. They are listed on the **Reports** page, where each one is saved against a client or another record.

A form belongs to your whole organisation. You create it once, publish it, and choose whether it is also offered in the Staff App.



Configuration

Configuration needs attention

Demo User
Demo Organisation

SYSTEM

Reports & Forms Settings

Build and manage the report and form templates your organisation uses.

Manage the report and form templates your organisation uses to capture structured records.

1 Organisation templates **2** Built-in templates

3 + Create template

4

NAME	STATUS	VERSION	STAFF MOBILE APP	UPDATED	
Sample Daily Check	Published	v1	☒	02/10/2026 06:10 pm	Edit Preview Unpublish Duplicate Archive
Sample Progress Check	Published	v1	☐	02/10/2026 07:24 pm	Edit Preview Unpublish Duplicate Archive

Rows 50

Back Next

The Organisation templates tab (1) and the Built-in templates tab (2). Choose + Create template to make a form (3). Each row shows the form's status, version and Staff mobile app switch, and has buttons that depend on its status (4).

Built-in and organisation templates

The library has two tabs. The **Built-in templates** tab holds the ready-made BondiByte templates, such as **Client progress**, **Client shift report**, **Incident report**, **Progress report** and **Risk observation**. They are the same for every organisation. You can preview a built-in template, or duplicate it to make your own version. You cannot edit one directly.

The **Organisation templates** tab holds the forms your organisation has created or duplicated. Each row shows the form's **Name**, its **Status** (**Draft**, **Published** or **Archived**), its **Version**, its **Staff mobile app** switch and when it was last **Updated**. The buttons on a row depend on its status: a draft can be edited, previewed, duplicated, published, archived or deleted, a published form can be edited, previewed, unpublished, duplicated or archived, and an archived form can be previewed, duplicated, restored or deleted.

Delete is offered on drafts and archived forms only, never on a published form, and it cannot be undone. Reports already made from a deleted form are kept. **Edit** is not offered on an archived form, so restore it before you edit it. **Show archived** appears above the list once a form has been archived.

You do not need to duplicate a built-in template to use it. Duplicate one when you want your own version with different questions.

- Create or clone a form



Status and versions

A new form starts as a **Draft**. A draft is not offered to anyone while you build it. **Publish** makes it available. **Archive** hides a form you no longer use, and **Restore** brings it back.

Publishing a draft that has changes creates a new version. Publishing a form again after **Unpublish**, without changes, brings the same version back into use. A report made from one of your organisation's forms keeps the version of the form it was completed on, so older reports still read the way they were written, even after the form changes.

A published form can be edited. Your changes to the questions wait as a draft until you choose **Publish** at the top right of the builder, and the row keeps the status **Published** meanwhile.

Unpublish takes a published form out of use and returns it to **Draft**. **Delete** removes a draft or archived form from the library. Reports already created from it are kept and still display.

- Publish a form

The Staff mobile app switch

Every template in the library has a switch in the **Staff mobile app** column. When a form is published and its switch is on, support workers can choose it in the Staff App when they write a report.

Your own forms, and most built-in forms, are off until you turn the switch on. **Client shift report** and **Incident report** are always available in the Staff App, so their switch is on and locked.

The switch applies to your whole organisation. Turning it off only stops the form being offered in the Staff App. It does not delete any reports.

- Show a form on the staff mobile app

Where reports are completed

Managers and coordinators add reports on the **Reports** page with **Add report**. They choose the form, choose the client the report is about, answer the questions and create the report. Support workers complete reports in the Staff App, and what they submit appears in the same **Reports** list.

A report made from one of your organisation's forms, or from a BondiByte report template used for a client, can be downloaded as a PDF from the menu on its row.

A form in the **Incident** category belongs to the Incidents area instead of **Reports**. Charts are a separate area with their own **Chart Library** in **Configuration**.

- Complete a report
- Download a report PDF

Who can do what

Owners and Admins can see and manage the library by default. A role that can view templates but not manage them can look at the library, while the buttons that change a template are switched off.

Adding, reading and downloading reports uses the permissions for notes, which Owners, Admins, Managers and Coordinators have by default. If your access is limited to certain sites, you only see and report on records within your own sites.



Important notes

Important: Changing one of your organisation's forms never changes reports that were already completed. They keep the version of the form they were completed on.

Good practice

- A good order for a new form is to create it, preview it, publish it, switch it on for the Staff App if staff will use it, then complete a test report.
- Retire a form with **Archive** or **Unpublish** rather than **Delete**. Both can be undone, and delete cannot.

Need more help?

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

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