

Set up Smart Rostering

Work through the Setup checklist in order, from switching Smart Rostering on to your first planned roster period, so BondiByte can build rosters itself.

WHO IT IS FOR Owner, Admin	TIME NEEDED About 30 minutes	LAST REVIEWED 8 October 2026
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Who this is for

Permissions: You need permission to manage Smart Rostering settings and to open the full Configuration page. Owners and Admins have both. Managers see only the Overview, Sites and Templates tabs, so they do not see the Setup tab.

Before you begin

- Your organisation's subscription or trial is active, and **Smart Rostering automation** is switched on in **Account settings > Automation & Capacity Controls**. It is on unless an Owner or Admin switched it off. If Smart Rostering is not available to your organisation, the **Setup** tab says **Setup progress could not load**.
- Your sites, staff and clients have records, and you know the regular shifts you want BondiByte to repeat. You build them by hand on the site's roster in the template step.
- Read the Smart Rostering overview first. It explains what BondiByte does by itself once setup is done.



Steps

1 Go to **Configuration > Rostering rules > Setup**

- 1 In the left menu, choose **Configuration**.
- 2 Choose the **Rostering rules** card. The workspace opens on the **Setup** tab until all eight checks are done, and on **Overview** afterwards.

The **Setup** tab is a checklist called **Finish Smart Rostering setup**. It shows how many checks are done, for example 3/8, and a **Next recommended action**. Choose a check to see **What the system checked**, any **Blockers**, and a button that takes you to the right screen. Choose **Refresh setup** after you make a change.

A check is **Done**, **Current** (do this next), **Blocked** (something is missing) or **Locked** (an earlier check comes first).

1. Subscription feature: Smart Rostering is available to your organisation, which needs an active subscription or trial.

2. Organisation settings: Smart Rostering is switched on for the organisation and its timings are in range. Covered in step 2 below.

3. Rule weights: At least one weight is active, so staff can be ranked. Covered in step 2 below.

4. Site enablement: At least one active site has Smart Rostering on. Covered in step 3 below.

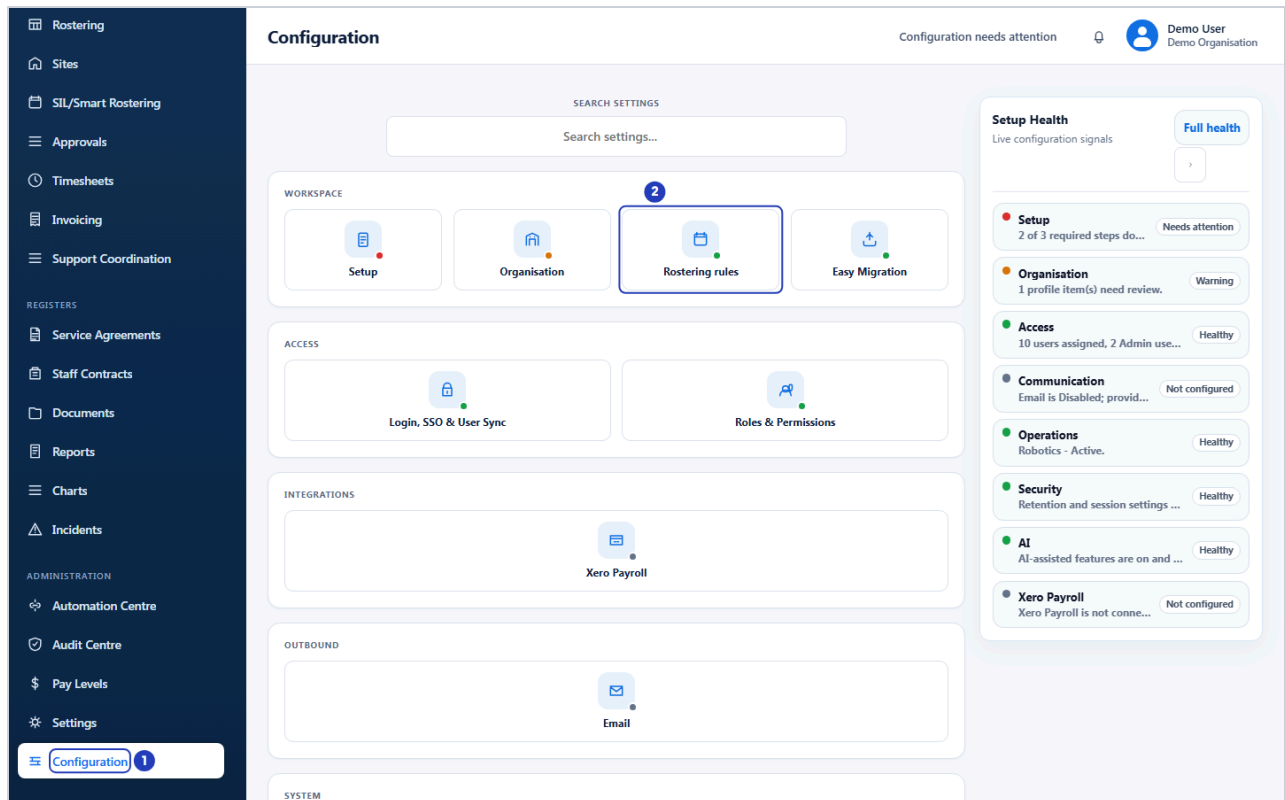
5. Site staff: Every site with Smart Rostering on has at least one active staff member on its team. Covered in step 3 below.

6. Active template with shifts: Every site with Smart Rostering on has an active template with at least one shift. Covered in step 4 below.

7. Open roster period: Every site with Smart Rostering on has a roster period that is current or in the future. Covered in step 5 below.

8. First run: BondiByte has completed one successful run. Covered in step 6 below.

Note: In the screenshot, setup is already finished, so there is no **Setup** tab. Yours shows it first until every check is done. The checklist's suggested fix locations use older menu names, such as **Smart Rostering > Organisation settings**. They mean the tabs under **Configuration > Rostering rules**.



Choose Configuration (1), then the Rostering rules card (2).

2 Switch on Smart Rostering and choose the rules (checks 1 to 3)

- 1 Open **Organisation Settings**, tick **Enable Smart Rostering**, check the timings and choose **Save organisation settings**. See Smart Rostering organisation settings.
- 2 Open **Rules & Weights**, choose a preset and choose **Save weights**. See Rules and Weights.

3 Switch on each site and build its team (checks 4 and 5)

- 1 Open the site, choose **Site settings** and switch on **Enable smart rostering automation for this site**. Choose **Save site automation**.
- 2 On the same site, choose **Staff** and **Assign staff** until the site has its team. Add at least one client too.

Repeat for each site you want rostered. See Prepare sites for Smart Rostering.



4 Build the first fortnight and give each site a template (check 6)

First build the site's first fortnight by hand. On **SIL/Smart Rostering**, choose the site, choose **+ Add shift** and tick **Repeat this shift** to create each regular shift across the period in one go. **Repeat this shift** stays available while the site has no active pattern, even though Smart Rostering is switched on.

Then, in the roster period that holds the shifts to repeat, open **More roster actions**, choose **Select shifts**, tick the shifts and choose **Create pattern**. In **Automation starts from roster period**, choose the first period BondiByte should build by itself.

See Build a roster template.

Important: If some steps for the start period you choose are already due, the window warns that work may be processed straight away. Choose a later period if you are not ready.

Tip: Once the pattern is active, **Repeat this shift** is greyed out for the site and says **Managed by the site's active Smart Rostering pattern**.

5 Check there is an open roster period (check 7)

BondiByte creates roster periods itself while **Enable automatic roster periods** is on in the organisation settings. If it is off, create the next period for the site on **SIL/Smart Rostering** with **Create roster period**.

6 Let the first run happen (check 8)

This check is done after one successful run. It happens by itself on the first planned **Shift Assignment Task** date. To finish setup sooner, open **SIL/Smart Rostering**, choose the site and a roster period, open **More roster actions** and choose **Run smart rostering**. A manual run builds that period straight away.

The run is listed on the **Generation Runs** tab. See Generation runs.

Note: A run builds a draft roster. Unless the site publishes by itself, a manager reviews it before it goes to staff.



7 Check each site shows Ready

Choose the **Sites** tab.

- 1 Look at **Readiness** for each site you set up. If a site shows **Needs attention**, open it and add the missing client or team member. See Check readiness for what each value means.

Overview

Organisation Settings

Rules & Weights

Sites

Templates

Readiness

Generation Runs

Site Automation Overview

1

Include inactive sites

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SITE	RECOMMENDATIONS	AUTOMATION	AUTO-PUBLISH	TEMPLATE	TEAM	CLIENTS	READINESS	LAST GENERATION
Harborview Respite House	Available	No	Yes, notify manager	-	6 / 0 / 2	1	Disabled	17/05/2026 10:33 pm
Northside Transitional Living	Available	Yes	Yes, notify manager	Northside Transitional Living-25/05/2026 automation pattern ACTIVE PATTERN	10 / 0 / 0	2	Ready	28/09/2026 12:36 pm
Riverbend Supported Living House	Available	No	No	-	3 / 1 / 0	2	Disabled	-
Sunrise Supported Living Home	Available	Yes	Yes, notify manager	Demo Automation SAVED	9 / 0 / 0	0	Needs attention	28/09/2026 12:36 pm
Willow Park Supported Living House	Available	Yes	Yes, notify manager	Willow Park Supported Living House-11/05/2026 automation pattern SAVED	5 / 2 / 0	2	Ready	28/09/2026 12:42 pm

Check the Readiness column (1) for each site you set up.



8 Confirm BondiByte has planned your roster periods

Choose the **Overview** tab.

- 1 The tiles at the top show whether **Smart rostering** is **On**, how many sites use automation and how many **Templates** you have.
- 2 **Automation Manager** shows when BondiByte last checked for due steps (**Last check**) and when it will check next.
- 3 Under **Upcoming Automation Actions**, choose a site.
- 4 Read the table. Each row is a roster period, with the planned date of its **Shift Creation Task**, **Interest Request Task**, **Shift Assignment Task** and **Publish Task**.

A site that does not publish by itself shows **Not enabled for site** under **Publish Task** and a **Manual Action** status, because a manager publishes.

Rostering rules
Roster period defaults and operational scheduling pointers.

Overview Organisation Settings Rules & Weights Sites Templates Readiness Generation Runs

Smart rostering **On** Fortnightly roster cycle Sites with recommendations **11** 4 using automation Templates **4** Automation patterns

Automation Manager

Scheduler **Enabled** Due work **0** 4 active pattern(s) monitored Queue backlog **2** 2 queued / 0 running Failures **0** 0 failed in the last hour

Last check **02/10/2026 05:05 am**
Next: 02/10/2026 05:10 am

Upcoming Automation Actions

SITE: **Acacia Community Access Hub**

Showing up to the next five planned Smart Rostering automation periods for this site.

DATE	SHIFT CREATION TASK	INTEREST REQUEST TASK	SHIFT ASSIGNMENT TASK	PUBLISH TASK	STATUS
28/09/2026 - 11/10/2026 Acacia Community Access Hub-28/09/2026	07/09/2026 Creates shifts from the active automation pattern. Ready now because the planned date has passed. COMPLETED	08/09/2026 Opens this roster for staff shift interest. Ready now because the planned date has passed. COMPLETED	14/09/2026 Runs Smart Rostering matching and assigns suitable staff. Ready now because the planned date has passed. COMPLETED	Not enabled for site Auto-publish is not enabled for this site.	MANUAL ACTION

The summary tiles (1), the Automation Manager (2), the site list for Upcoming Automation Actions (3) and the table of planned periods (4).

What happens next

When all eight checks are done, the **Setup** tab is hidden and the workspace opens on **Overview**.

From then on BondiByte plans every upcoming roster period itself and builds it on the planned dates. You review each draft and publish it. See How Smart Rostering builds a roster.

You can change any setting later. Changes to timing apply to roster periods planned after the change.



Important notes

Important: Smart Rostering builds the roster and a manager reviews it. It applies only the rules and weights your organisation has set.

Good practice

- Work through the checks in order. A check stays **Locked** until the one before it is done.
- Finish one site completely, with its team, clients and template, before you switch on the next, so any problem is easy to trace.
- After you change something on another screen, come back and choose **Refresh setup** to see the check turn **Done**.

Troubleshooting

I cannot see the **Setup** tab.

Why it happens: The tab is shown only while setup is unfinished, and only to people who can open every tab of the Rostering rules page.

What to do: Use the **Overview** tab to see how Smart Rostering is doing. If you expected the checklist, ask an Owner or Admin to check your role.

The **Setup** tab says **Setup progress could not load**.

Why it happens: Smart Rostering is not available because your organisation's subscription or trial is not active, or the page could not reach BondiByte.

What to do: Choose **Retry**. If it keeps failing, contact BondiByte support.

Choosing **Run smart rostering** shows **This automation is not enabled for your organisation**.

Why it happens: Smart Rostering automation is off in **Account settings > Automation & Capacity Controls**, so check 8 cannot finish and BondiByte does not build rosters by itself.

What to do: An Owner or Admin switches **Smart Rostering automation** on. See Automation Capacity.

A check shows **Locked**.

Why it happens: An earlier check is not done yet.

What to do: Do the earlier checks in order. The next one opens as soon as the one before it is **Done**.

A check shows **Blocked**.

Why it happens: Something is missing. The **Blockers** list under the check names it.

What to do: Read the **Blockers**, use the button under the details to go to the right screen, make the change, then choose **Refresh setup**.

I fixed something but the check is not **Done**.

Why it happens: The checklist has not refreshed yet.

What to do: Choose **Refresh setup**. While the **Setup** tab is open it also refreshes by itself.

A blocker says a site has no open current or future roster period.

Why it happens: The message reads **<site> has no open current or future roster period**.

What to do: Turn on **Enable automatic roster periods** in the organisation settings, or create the next roster period for the site.



A blocker says a site does not have an active automation pattern, or has no active shifts in it.

Why it happens: The site has no template yet, or its template has no shifts.

What to do: Build one fortnight by hand first, using **Repeat this shift** in the **Add shift** window. Then create a template from the roster. See Build a roster template.

A blocker says a site has no active staff assigned.

Why it happens: No active staff member is on the site team.

What to do: Open the site, choose the **Staff** tab and then **Assign staff**. See Prepare sites for Smart Rostering.

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 8 October 2026.*