

Smart Rostering organisation settings

Switch Smart Rostering on for the organisation, choose when each automatic step happens and whether a manager must review rosters before they publish.

WHO IT IS FOR Owner, Admin	TIME NEEDED About 8 minutes	LAST REVIEWED 3 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 can open only the Overview, Sites and Templates tabs, so they cannot change these settings.

Before you begin

- Your organisation's subscription or trial is active. This guide covers the organisation-wide switch, **Enable Smart Rostering**. Each site then has its own switch. See Prepare sites for Smart Rostering.
- Read the Smart Rostering overview for what the four automatic steps are. The timings below are the dates of those steps.
- You know how many days ahead you want shifts created, and whether staff should be asked which shifts they would like.



Steps

- 1 Go to **Configuration > Rostering rules > Organisation Settings**
 - 1 In the left menu, choose **Configuration**.
 - 2 Choose the **Rostering rules** card. The workspace opens with the tabs **Overview**, **Organisation Settings**, **Rules & Weights**, **Sites**, **Templates**, **Readiness** and **Generation Runs**.
 - 3 Choose the **Organisation Settings** tab.

Choose Configuration (1), then the Rostering rules card (2, shown here as the page heading once it is open), then the Organisation Settings tab in the row of tabs (3).



2 Check the roster period at the top of the tab

The **Roster period automation** card sets the cycle that every roster, timesheet and invoice runs on.

- 1 **Enable automatic roster periods** lets BondiByte create each new roster period for you.
- 2 **First period starts** is the start of the cycle. It must be a Sunday or a Monday.
- 3 **Period cycle** is **Fortnightly** or **Monthly**.

Important: Once Smart Rostering is on for your organisation, this card is locked and says **Locked while automatic roster periods are on**. To change the start date or the cycle, turn off Smart Rostering and the automation on every site first. A change applies from the first period you choose and does not change existing roster periods.

The roster period settings. Check whether automatic roster periods are on (1), the start date of the cycle (2) and the period cycle (3).



3 Turn on Smart Rostering and choose the timing

- 1 **Roster period type** and **Week starts** are shown for information. They come from the card above.
- 2 Tick **Enable Smart Rostering**. The timing and review options appear below it.
- 3 In **Shift creation lead time**, choose how many days before a roster period starts that BondiByte creates its shifts.
- 4 In **Interest request timing**, choose when staff are asked which shifts they would like, counted from shift creation.
- 5 In **Shift assignment timing**, choose how many days after the interest request BondiByte builds the draft roster.
- 6 In **Publish timing**, choose when the roster is published or marked ready for review, counted from shift assignment.

These four choices are the dates of the four automatic steps. For example, with 21 days, 1 day, 6 days and 3 days (the values in the picture), a roster period that starts on Monday 28 September has its shifts created on 7 September, staff asked on 8 September, the draft built on 14 September and the publish step on 17 September.

Shift creation lead time: 14 to 28 days before the roster period starts. A new organisation starts at 21 days.

Interest request timing: From **Immediately after shifts are created** up to 3 days after. A new organisation starts at **Immediately after shifts are created**.

Shift assignment timing: 1 to 7 days after the interest request. If staff interest is off for a site, it is counted from shift creation instead. A new organisation starts at 3 days.

Publish timing: From **Immediately after shifts are assigned** up to 3 days after. A roster is published by itself only for sites where **Allow auto-publish** is on. A new organisation starts at 1 day.

Warning: If you untick **Enable Smart Rostering**, BondiByte asks **Turn off Smart Rostering?** Automatic shift creation and assignment stops for the whole organisation. Existing shifts and published rosters are not changed, and you can turn it back on at any time.

Note: The dates are fixed for a roster period when BondiByte first plans it. A change here applies to roster periods planned after you save, not to ones already planned.



Smart Rostering

1

ROSTER PERIOD TYPE

WEEK STARTS

Fortnightly

Monday

Managed in [Roster period settings](#) above.

2

Enable Smart Rostering

☒

3

Shift creation lead time

21 days before roster period starts

▼

4

Interest request timing

1 day after shifts are created

▼

5

Shift assignment timing

6 days after interest request

▼

If staff interest is disabled for a site, assignment is scheduled after shift creation instead.

6

Publish timing

3 days after shifts are assigned

▼

Auto-publish still only runs for sites where auto-publish is enabled.

Read the roster period type and week start (1), tick Enable Smart Rostering (2), then choose the shift creation lead time (3), interest request timing (4), shift assignment timing (5) and publish timing (6).



4 Choose the review and site options

- 1 **Require manager review** is ticked for a new organisation. While it is ticked, every draft roster waits for a person to publish it, and no site can publish by itself. Untick it only if you want BondiByte to publish for the sites that allow it.
- 2 **Allow staff interest** lets BondiByte take the optional second step and ask staff which shifts they would like.
- 3 **Allow site overrides** lets each site tune the site-level options that are permitted. A new organisation starts with it ticked.

Important: A site that has **Allow auto-publish** on shows **Auto-publish is currently blocked at organisation level** while **Require manager review** is ticked here.

Note: The same tab holds the cards **Automatic draft timesheets**, **Automatic draft client invoices** and **Clock-in & attendance**. They are saved with the same button but are not Smart Rostering settings.

Choose whether a manager must review rosters (1), whether staff interest is collected (2) and whether sites may override (3).



5 Choose **Save organisation settings**

Nothing changes until you save.

- 1 Choose **Save organisation settings** at the bottom of the tab. A message confirms **Organisation smart rostering settings saved.**

i Automatic draft client invoices

☐ Automatically create draft client invoices at the end of each period **DISABLED**

When enabled, BondiByte creates draft invoices from approved shift billing line item selections. Invoices stay editable and are never sent automatically.

i Clock-in & attendance

☐ Turn on clock-in / clock-out for the organisation **DISABLED**

Sites can override this. A site with its own clock-in setting turned on keeps it, and geofence checks use each site's saved location.

1 Save organisation settings

Choose *Save organisation settings (1)* when you have checked your choices.

What happens next

The settings apply to every site in your organisation.

Roster periods that BondiByte plans from now on use the new timings. The **Overview** tab shows the planned dates for each site under **Upcoming Automation Actions**.

Next, switch on each site and link its team. See Prepare sites for Smart Rostering.

Important notes

Important: Keep **Require manager review** ticked unless your organisation has decided how rosters will be checked. While it is ticked, no roster is published until a person publishes it.

Good practice

- Set **First period starts** and **Period cycle** before you tick **Enable Smart Rostering**. Once Smart Rostering is on, that card is locked.
- Leave enough days between the interest request and shift assignment for staff to answer. **Shift assignment timing** is counted from the interest request.
- Check the other cards on the tab before you choose **Save organisation settings**. The button saves them all together.



Troubleshooting

I cannot see the **Organisation Settings** tab.

Why it happens: Only people who can open the full Configuration page see this tab. Managers and Rostering Officers see only the Overview, Sites and Templates tabs.

What to do: Ask an Owner or Admin to make the change, or to check your role.

The timing and review options are not on the screen.

Why it happens: They appear only while **Enable Smart Rostering** is ticked.

What to do: Tick **Enable Smart Rostering**.

I cannot change **First period starts** or **Period cycle**.

Why it happens: The card is locked while automatic roster periods, Smart Rostering or site templates are active.

What to do: Turn off automatic roster periods, or turn off Smart Rostering and the automation on every site first, then change the date or cycle. Existing roster periods are not changed.

Save organisation settings is greyed out and its hover text says **Resolve the roster period overlap, or acknowledge the coverage gap, before saving**.

Why it happens: The new roster cycle you chose would overlap existing roster periods, or leave a gap in roster coverage.

What to do: Choose a different **First period starts** date. If the gap is expected, tick **I understand there will be a gap** under the preview message.

A site has auto-publish switched on but its roster is not published by itself.

Why it happens: **Require manager review** is ticked for the whole organisation, which blocks auto-publish at every site.

What to do: Untick **Require manager review** here only if your organisation has decided that rosters may publish without a manager checking them, then save.

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.
Last reviewed 3 October 2026.*