

Prepare sites for Smart Rostering

Switch Smart Rostering on for a site, choose how it behaves, link its team and set its publishing options, so BondiByte can build the site's rosters itself.

WHO IT IS FOR Owner, Admin, Manager	TIME NEEDED About 15 minutes	LAST REVIEWED 8 October 2026
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Who this is for

Permissions: You need permission to manage site settings and Smart Rostering settings. Owners, Admins and Managers have both by default. A manager limited to certain sites can change only those sites.

Before you begin

- **Enable Smart Rostering** is ticked for the organisation. An Owner or Admin does this under **Configuration > Rostering rules > Organisation Settings**. If Smart Rostering is not available to your organisation, the switches in this guide do not appear. See Smart Rostering organisation settings.
- The site exists, and the staff and clients you want to link to it have records. See Create a staff member.
- Read the Smart Rostering overview. BondiByte rosters only people on the site's team.



Steps

1 Go to Configuration > Rostering rules > Sites

- 1 In the left menu, choose **Configuration**.
- 2 Choose the **Rostering rules** card.
- 3 Choose the **Sites** tab. It shows the **Site Automation Overview**, a list of your active sites. Tick **Include inactive sites** to see inactive ones too.

For each site, **Automation** is **Yes** when Smart Rostering is switched on, **Team** gives the primary team, the secondary team and relief staff (for example 6 / 2 / 0), **Clients** is the number of active clients linked to the site, and **Readiness** says whether the site is set up to be rostered. See Check readiness for what each value means.

Note: A Manager sees **Configuration** open straight on the Rostering rules page, with only the **Overview**, **Sites** and **Templates** tabs. There is no card to choose, so go straight to the **Sites** tab.

The screenshot shows the 'Configuration' page with the 'Rostering rules' card selected. The 'Sites' tab is active, displaying the 'Site Automation Overview' table. The table lists sites with their automation status, publish settings, templates, and team information. A sidebar on the right shows 'Setup Health' with various system checks.

SITE	RECOMMENDATIONS	AUTOMATION	AUTO-PUBLISH	TEMPLATE	TEAM
Harborview Respite House	Available	No	Yes, notify manager	-	6 / 0 / 2
Northside Transitional Living	Available	Yes	Yes, notify manager	Northside Transitional Living-25/05/2026 automation pattern ACTIVE PATTERN	10 / 0 / 0
Riverbend Supported Living House	Available	No	No	-	3 / 1 / 0
Sunrise Supported Living Home	Available	Yes	Yes, notify manager	Demo Automation SAVED	9 / 0 / 0
Willow Park Supported Living House	Available	Yes	Yes, notify manager	Willow Park Supported Living House-11/05/2026 automation pattern SAVED	5 / 2 / 0

Setup Health
Live configuration signals
Full health

- Setup**: 2 of 3 required steps do... **Needs attention**
- Organisation**: 1 profile item(s) need review. **Warning**
- Access**: 10 users assigned, 2 Admin use... **Healthy**
- Communication**: Email is Disabled; provid... **Not configured**
- Operations**: Robotics - Active. **Healthy**
- Security**: Retention and session settings ... **Healthy**
- AI**: AI-assisted features are on and ... **Healthy**
- Xero Payroll**: Xero Payroll is not conn... **Not configured**

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

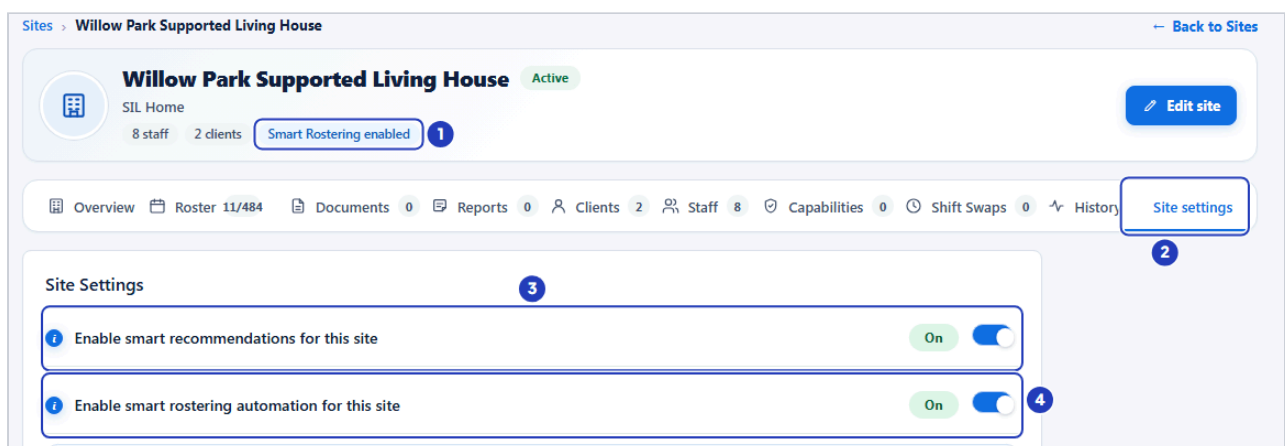


2 Open the site and turn on Smart Rostering

- 1 Choose the site's name. The site page opens, and a label under the name says **Smart Rostering enabled** or **Smart Rostering off**.
- 2 Choose the **Site settings** tab at the right-hand end of the row of tabs.
- 3 **Enable smart recommendations for this site** ranks staff when someone assigns people to shifts. It does not build rosters by itself.
- 4 Switch on **Enable smart rostering automation for this site**. This is the switch that lets BondiByte build the site's rosters on the automation plan. The **Site Automation Behaviour** settings appear below it.

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

Note: On the roster (**SIL/Smart Rostering**), the **Enable Smart Rostering** button opens these same site settings with the automation switch already on. Nothing is saved until you choose **Save**, which takes you back to the roster.



Open the site (1), choose the Site settings tab (2), then check smart recommendations (3) and Smart Rostering automation (4).



3 Set the site's staffing and priorities

These settings sit under **Site Automation Behaviour**. Hover over the small **i** beside a name for a short explanation.

- 1 **Active template** shows the template BondiByte uses for this site. You cannot change it here once the site has one. You create it on the roster. See [Build a roster template](#).
- 2 **Minimum daily staff** is the lowest daily staffing the site expects, from 1 to 200. A new site starts at 1.
- 3 **Default staff capacity** is the most hours a person should be rostered here in a fortnight, from 0 to 336. A new site starts at 76. A limit on a person's own staff record is used first.
- 4 **Continuity priority**: drag right to favour staff who know the site and its clients.
- 5 **Weekend fairness**: drag right to share weekend shifts more evenly.
- 6 **Sleepover fairness**: drag right to share sleepover shifts more evenly.
- 7 **Active night fairness**: drag right to share active night shifts more evenly.

Each slider runs from 0 to 100 and a new site starts every one at 50. You can leave them as they are.

Check the active template (1), then set minimum daily staff (2), default staff capacity (3) and the four priority sliders (4 to 7).



4 Choose how the site uses its team

- 1 **Allow double shifts** lets a person have more than one same-day shift when the fatigue checks pass. Overlapping shifts stay blocked.
- 2 **Allow secondary team** lets secondary team members be considered after the primary team.
- 3 **Allow relief staff** lets relief staff be considered if better team matches are not available.
- 4 **Prefer primary team** ranks primary team members higher.
- 5 **Prefer secondary before relief** ranks secondary team members above relief staff when other checks are similar.
- 6 **Use staff interest collection** lets this site's future rosters ask staff which shifts they would like before shifts are assigned. It also needs **Allow staff interest** on in the organisation settings.

Note: Secondary and relief staff are considered only when the primary team has no capacity left for the shift.

Setting	Status	Number
Allow double shifts	Off	1
Allow secondary team	On	2
Allow relief staff	On	3
Prefer primary team	On	4
Prefer secondary before relief	On	5
Use staff interest collection	On	6

Choose whether to allow double shifts (1), the secondary team (2) and relief staff (3), and the team preferences (4 and 5) and staff interest (6).



5 Choose notifications and publishing

- 1 **Notify manager after shifts are created** tells the site manager when BondiByte creates the site's shifts.
- 2 **Notify manager after shifts are assigned** tells the site manager when the draft roster is built.
- 3 **Allow auto-publish**: switch on only if BondiByte may publish this site's roster by itself on the planned date. Switching it on switches **Require manager review** off for the site. It also needs **Require manager review** off for the whole organisation.
- 4 **Require manager review**: leave on if a manager should publish each roster. Switching it on switches **Allow auto-publish** off.

While auto-publish is off, **Remind manager to publish** appears. Switch it on to email the site manager a daily reminder when a roster is built but not published.

Important: A roster that publishes by itself goes to staff even if some shifts are still unfilled. The site manager is told about unfilled shifts when the draft is built. If the organisation requires manager review, this page says **Auto-publish is currently blocked at organisation level**.

Note: Notifications go to the person chosen under **Site manager / Team leader** lower on this page. If nobody is chosen, they go to the organisation owners and admins.

1 Notify manager after shifts are created Off

2 Notify manager after shifts are assigned Off

3 Allow auto-publish On

Auto-publish is currently blocked at organisation level. Go to Smart Rostering > Organisation settings > Require manager review and turn it off before this site can auto-publish.

Notify manager after shifts are published On

4 Require manager review Off

Choose the manager notifications (1 and 2), then auto-publish (3) and manager review (4).



6 Choose **Save site automation**

Check the summary at the bottom of the page. It shows the number of **Primary**, **Secondary** and **Relief** staff and a **Readiness** tile that reads **Ready** or **Needs review**. **Open Smart Rostering settings** takes you back to the Rostering rules page.

1 Choose **Save site automation**. A message confirms **Site settings saved**.

Note: This button also saves the other settings on the page, such as site notifications, shift swaps and clock-in. Check them before you save.

Require shift edit reason Off

6 Primary	2 Secondary	0 Relief	Ready Readiness
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[Open Smart Rostering settings](#)

1 **Save site automation**

Choose *Save site automation* (1).



7 Add the site team on the **Staff** tab

Only the people on the site team can be rostered at this site. A site with no team shows **Needs attention** on the **Sites** tab. On the site's page, choose the **Staff** tab, then **Assign staff**. The **Rostering priority** column shows each person's place in the team.

- 1 In **Staff**, choose the person.
- 2 In **Rostering priority**, choose **Primary Team**, **Secondary Team**, **Relief Team**, **Site Lead** or **Coordinator / Oversight**.
- 3 Check **Start date**. It starts as today. Choose a future date for a planned team change.
- 4 Add an **End date** if the person's time on the team will end.
- 5 Add **Notes** if you need them.
- 6 Choose **Assign staff**.

Note: **Site Lead** and **Coordinator / Oversight** are not counted in the **Team** numbers on the **Sites** tab, but BondiByte can still recommend people with these roles for shifts at the site. Give someone one of these roles only if they may also work shifts here.

Important: Make sure the site also has at least one active client. Choose the **Clients** tab and then **Assign client** if it has none.

The screenshot shows a modal window titled "Assign staff to site" with a subtitle "Connect a staff member to this site team." and a "Close" button. The form contains the following fields, each with a numbered callout:

- Staff** (1): A dropdown menu with "Select staff" and a downward arrow.
- Rostering priority** (2): A dropdown menu with "Primary Team" and a downward arrow.
- Start date** (3): A date input field showing "02/10/2026" and a calendar icon. Below it is the text: "Defaults to today. Use a future date for a scheduled team change."
- End date** (4): A date input field showing "dd/mm/yyyy" and a calendar icon.
- Notes** (5): A large text area for notes.
- Assign staff** (6): A blue button at the bottom of the form.

Choose the person (1) and their rostering priority (2), check the start date (3), add an end date (4) and notes (5) if needed, then choose Assign staff (6).



8 Add a capability requirement if the site needs one

Choose the **Capabilities** tab, then **Add requirement**. The **Add capability requirement** window opens.

- 1 In **Capability**, choose a check, licence, skill or training.
- 2 In **Rostering level**, choose **Hard blocker** or **Preferred**.
- 3 Add **Notes** if you need them.
- 4 Choose **Add requirement**.

Note: A **Hard blocker** excludes staff who do not hold the capability. **Preferred** only improves their ranking. To add a capability that is not in the list, use **Rules & Weights**. See Rules and Weights.

Note: For the built-in compliance checks, such as the NDIS Worker Screening Check, the roosting level shows **Enforced at organisation level**. It is set once for every site in **Audit Centre > Settings**, not per site.

Choose the capability (1) and the roosting level (2), add notes if needed (3), then choose Add requirement (4).

What happens next

The site appears on the **Sites** tab with its readiness.

Next, give the site a template. Build the site's first fortnight by hand first. **Repeat this shift** in the **Add shift** window stays available until the site has an active pattern. See Build a roster template. Once it has one, BondiByte plans the site's roster periods and builds them itself.

Changes to these settings apply the next time BondiByte builds a roster for the site.

Important notes

Important: Turning Smart Rostering off for a site stops automatic shift creation and assignment there. Existing shifts and published rosters are not changed.



Good practice

- Switch on one site at a time. Link its team and clients, build its template and check its first draft roster before you switch on the next site.
- Put the people who normally work at the site in the **Primary Team**. Use **Secondary Team** and **Relief Team** for backup staff.
- Leave **Allow auto-publish** off for a site until a manager has checked several of its draft rosters.

Troubleshooting

The site shows **Needs attention** under **Readiness**.

Why it happens: Automation is on for the site but it has no active client linked, or no one in its team.

What to do: Open the site. Use **Assign client** on the **Clients** tab and **Assign staff** on the **Staff** tab, then check the **Sites** tab again.

The page says **Auto-publish is currently blocked at organisation level**.

Why it happens: **Require manager review** is switched on for the whole organisation, which stops every site from publishing by itself.

What to do: Leave it on if managers should review rosters. Otherwise an Owner or Admin can switch it off in the organisation settings. See Smart Rostering organisation settings.

A message asks **Turn off Smart Rostering for this site?**

Why it happens: You switched off **Enable smart rostering automation for this site**. That stops automatic shift creation and assignment for the site.

What to do: Choose **Turn off** only if you mean to stop it. Choose **Cancel** to keep it on.

Active template says No active template.

Why it happens: The site has no template yet. A template is created from the roster, not from this page.

What to do: See Build a roster template.

I cannot see **Assign staff** or **Add requirement**.

Why it happens: Your role does not include permission to edit sites, or the site is inactive. For an inactive site the tab says **Staff cannot be assigned to an inactive site**.

What to do: Ask an Owner or Admin to check your role, or to make the change for you. Reactivate the site first if it is inactive.

Site settings has no Smart Rostering switches.

Why it happens: Smart Rostering is not available to your organisation, which needs an active subscription or trial.

What to do: An Owner or Admin checks **Billing & subscription**, and contacts BondiByte support if the subscription should be active.

I cannot find a site on the **Sites** tab.

Why it happens: The tab lists only active sites unless you tick **Include inactive sites**.

What to do: Tick **Include inactive sites**. If the site still is not there, check that it exists on the **Sites** page.

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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