

Build a roster template

Create a site's template from the shifts in one roster period, then check and edit it. BondiByte copies it into every later roster period.

WHO IT IS FOR Owner, Admin, Manager	TIME NEEDED About 12 minutes	LAST REVIEWED 8 October 2026
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Who this is for

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

Before you begin

- Smart Rostering is switched on for the organisation and for the site (**Enable smart rostering automation for this site** on the site's **Site settings** tab). While it is off for the site, **Select shifts** is greyed out. See Prepare sites for Smart Rostering.
- One roster period for the site already holds the shifts you want to repeat, and the next roster period exists. If the site is new, build that period by hand first. In the **Add shift** window, **Repeat this shift** stays available until the site has an active pattern.
- Read the Smart Rostering overview. A template is also called a pattern.



Steps

1 Go to **SIL/Smart Rostering** > **More roster actions** > **Select shifts**

- 1 In the left menu, choose **SIL/Smart Rostering**. The **Roster Workspace** opens.
- 2 In **Site**, choose the site. The field is called **Site/Client** if your organisation rosters clients without a site, as in the picture. Move to the roster period you want to copy from.
- 3 Choose **More roster actions**, the three dots at the right of the toolbar, then **Select shifts**. A bar appears that says **Selecting shifts to snapshot into a pattern**.

Tick each shift you want in the template, or choose **Select all** to tick every shift in the period. Then choose **Create pattern**. The button shows how many shifts you have ticked.

Warning: The button at the top right of the roster says **Disable Smart Rostering** when the site uses Smart Rostering, and **Enable Smart Rostering** when it does not. **Disable Smart Rostering** takes effect straight away, so choose it only if you mean to stop Smart Rostering for the site. **Enable Smart Rostering** opens the site's settings.

Note: **Select shifts** appears only when you may manage Smart Rostering, the site has no template yet and the period has shifts. If it is greyed out, Smart Rostering is off for the site: hover over it and it says **Enable Smart Rostering for this site before selecting shifts**.

Choose **SIL/Smart Rostering** (1), choose the site (2) and find **More roster actions** (3), the three dots in the toolbar.



2 Name the template and choose where it starts

The **Create Smart Rostering pattern** window opens.

- 1 In **Pattern name**, type a name.
- 2 In **Automation starts from roster period**, choose the first period BondiByte should build by itself. It builds that period and every period after it. Periods that are already fully built are not listed.
- 3 Tick **Save as reusable template** if you want to keep the pattern for later, then type a **Reusable template name**.
- 4 Choose **Create pattern**. A message says the pattern is active and ready to run from the next valid roster period.

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

Note: All the shifts in a template must come from the same roster period. If the list of periods is empty, the window says to create the next roster period for the site first.

3 Go to Configuration > Rostering rules > Templates

In the left menu, choose **Configuration**, then the **Rostering rules** card, then the **Templates** tab.

- 1 In **Site**, choose the site.
- 2 In **Template**, choose the pattern. Each entry shows its name, its status, **Active for site** when it is the template in use, and its number of shifts.

Note: A Manager sees **Configuration** open straight on the Rostering rules page, with only the **Overview**, **Sites** and **Templates** tabs. Go straight to the **Templates** tab.

Choose the site (1), then the template (2).



4 Read the template

- 1 The tag and name at the top show the template and its status, for example **ACTIVE**.
- 2 **Apply to next roster** is explained in the last step.
- 3 The facts show the **Site**, the **Shift count**, the **Pattern cycle** (**Fortnightly** or **Monthly**), when it was **Created** and the **Next roster** period.
- 4 The **Pattern board** shows the repeating shifts. It has no calendar dates. **Week 1, Week 2** and any later weeks repeat in each new roster period, and each day is labelled **Pattern day** 1, 2 and so on.

The screenshot shows a web interface for managing roster templates. At the top, there are two dropdown menus: 'Site' (set to 'Willow Park Supported Living House') and 'Template' (set to 'Willow Park Supported Living House-11/05/2026 automation pattern - Active - Active for si...'). Below these is a status bar showing 'ACTIVE' and the full template name, with a blue circle '1' next to it. A blue button 'Apply to next roster 12/10/2026 - 25/10/2026' is highlighted with a blue circle '2'. Below the button is a warning message: 'This pattern can only be applied before automation runs for that roster.' A facts section contains four items: 'Site: Willow Park Supported Living House', 'Shift count: 42', 'Pattern cycle: Fortnightly', and 'Created: 17/05/2026 06:38 pm'. Below this is a 'Next roster' section showing '12/10/2026 - 25/10/2026', with a blue circle '3' next to it. At the bottom right are three buttons: 'Edit template' (blue), 'Refresh' (light blue), and 'Delete template' (light blue). A blue circle '4' is next to the 'Edit template' button. At the very bottom is a 'Pattern board' section with an information icon and the text 'Pattern board'.

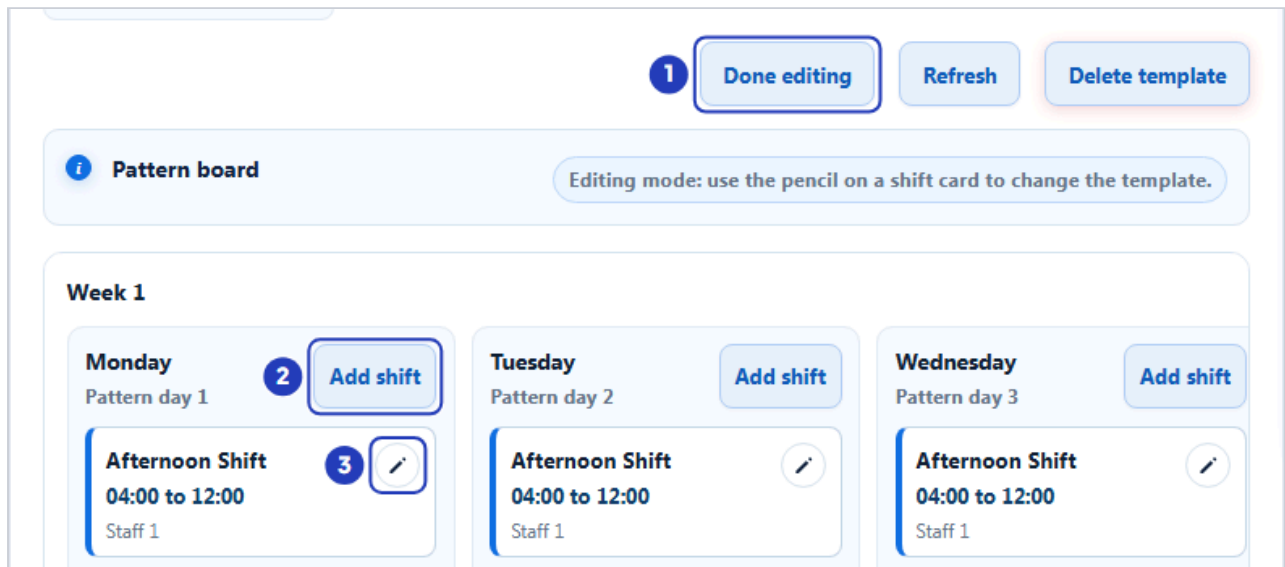
The template name and status (1), the Apply to next roster button (2), the facts (3) and the pattern board (4).



5 Turn on editing

- 1 Choose **Edit template**. The button changes to **Done editing** and the board says **Editing mode: use the pencil on a shift card to change the template**.
- 2 Choose **Add shift** on a day to add a shift to that day. A shift named **New pattern shift** from 09:00 to 17:00 for one staff member is added at once, and you then change it with the pencil.
- 3 Choose the pencil on a shift card to change that shift.

Warning: **Add shift** saves straight away. You do not need to choose a Save button, and nothing asks you to confirm.



Choose **Edit template**, which becomes **Done editing** (1). In editing mode each day has an **Add shift** button (2) and each shift has a pencil (3).



6 Change a shift

A panel opens at the right with a **Template shift details** section. The times you set here are used when BondiByte creates future shifts for the site. Choose **Close** at the top of the panel to leave it without changing anything.

- 1 Change the **Title** if you want a different name for the shifts BondiByte creates.
- 2 In **Pattern day**, choose the week and day, for example **Week 1 - Monday**.
- 3 In **Required staff**, enter how many people the shift needs, from 1 to 200.
- 4 In **Start time**, choose the start.
- 5 In **End time**, choose the end. **End day** then says **Same day** or **Next day** by itself.
- 6 Add **Notes** if you need them.

Sleepover shifts: A sleepover shift shows **Sleepover segments** instead of a start and end time, with **First support starts** and **First support ends**, and **Last support starts** and **Last support ends**. The time between them is the sleep.

Client invoice line items: Optional. Lower in the panel you can choose the agreement line items used when client invoices are made for the shift.

Afternoon Shift
Pattern day 1 · 04:00 to 12:00 · Standard shift

Close

Template shift details

Pattern times create future site-local shifts
Smart Rostering applies these times to the chosen site's roster periods when it generates shifts.

Title 1
Afternoon Shift
Template shifts use this title when Smart Rostering creates future shifts.

Pattern day 2
Week 1 - Monday

Required staff 3
1

Start time 4
04:00

End time
12:00

End day
Same day 5

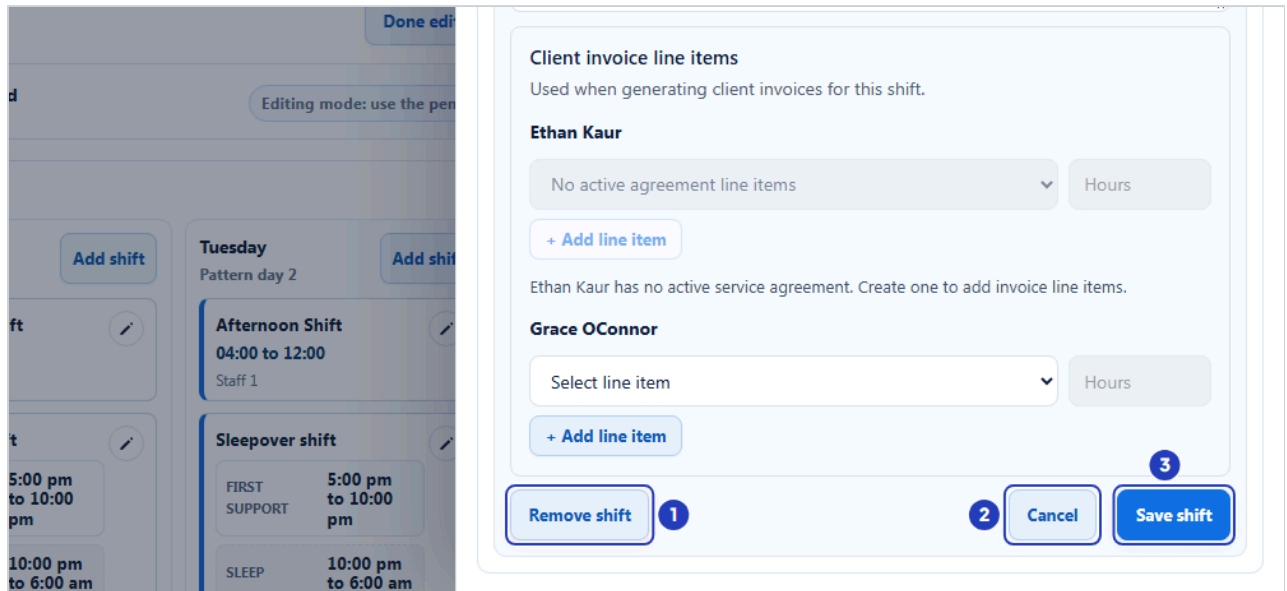
Notes 6
Loaded from template: Harborview Respite House-11/05/2026 automation pattern template

Change the title (1), the pattern day (2), the required staff (3), the start time (4), the end time (5) and the notes (6).



7 Save the shift, or remove it

- 1 Choose **Remove shift** to take the shift out of the template. BondiByte asks **Remove shift from template?** and explains that future roster periods will not include it.
- 2 Choose **Cancel** to close the panel without saving.
- 3 Choose **Save shift** to keep your changes. A message confirms **Saved** and the shift name. When you have finished, choose **Done editing**.



Choose **Remove shift** (1) to take the shift out of the pattern, **Cancel** (2) to close without saving, or **Save shift** (3) to keep your changes.

8 Apply the template to the next roster, if you need to

BondiByte normally creates each roster period's shifts from the template on its planned date. **Apply to next roster** does it now for the next roster period. It works only before BondiByte has built that period.

- 1 Choose **Apply to next roster** with the dates shown on the button.
- 2 In the window **Apply template to next roster?**, choose **Apply template**.
- 3 A message tells you how many shifts were created.

Note: If the button is greyed out, the line under it explains why, for example **This pattern can only be applied before automation runs for that roster**. The page also says **No future roster period is available** when the next period does not exist yet.



What happens next

Once a site has an active template, BondiByte uses it to create the shifts of each later roster period, on the timing set in the organisation settings.

Once the pattern is active, **Repeat this shift** in the **Add shift** window is greyed out for the site and says **Managed by the site's active Smart Rostering pattern**. To add or remove one shift later, open that shift on the roster. Its **Automation pattern** section offers **Add shift to future batch** or **Remove from future batches**.

To keep a particular person on a recurring shift, use the padlock beside their name on the roster. See [Assign and publish from Smart Rostering](#).

Next, check the site on the **Readiness** tab. See [Check readiness](#).

Important notes

Important: A template is a copy of the shifts in one roster period. Every shift you tick is copied, including one-off shifts, and repeats in later periods.

Warning: **Delete template** removes the template and all its shifts for good. Shifts it has already created stay on their rosters as standalone shifts. If the template is active and Smart Rostering is still on for the site, BondiByte asks you to turn Smart Rostering off for the site first.

Good practice

- Build the template from a typical roster period and tick only the shifts that should repeat.
- Choose **Automation starts from roster period** carefully. If steps for that period are already due, the window warns you that work may be processed straight away, so pick a later period if you want time to check the template first.
- After you create the template, open it on the **Templates** tab and read the **Pattern board** before you rely on it. Check the days, times and number of staff on each shift.

Troubleshooting

Select shifts is greyed out.

Why it happens: Smart Rostering is switched off for the site. Hovering over it says **Enable Smart Rostering for this site before selecting shifts**.

What to do: Choose **Enable Smart Rostering** at the top right of the roster. It opens the site's settings with the automation switch already on. Saving or choosing **Cancel** takes you back to the roster.

I cannot find **Select shifts** in **More roster actions**.

Why it happens: The site already has an active template, the period has no shifts, or your role cannot manage Smart Rostering settings.

What to do: Change the existing template on the **Templates** tab. To add or remove a single shift, use the **Automation pattern** section of that shift on the roster.

**Create pattern** is greyed out.

Why it happens: No shift is ticked, or the window is missing a **Pattern name**, an **Automation starts from roster period**, or a **Reusable template name** while **Save as reusable template** is ticked.

What to do: Tick at least one shift and complete the fields in the window.

The list under **Automation starts from roster period** is empty.

Why it happens: The window says **Create the next roster period for this site before saving an automation pattern**.

What to do: Create the next roster period for the site, then start again.

Apply to next roster is greyed out.

Why it happens: BondiByte has already built that roster, or the next roster period does not exist, or the template is not active or has no shifts.

What to do: Read the line under the button for the exact reason. If the roster has been built, change its shifts directly on the roster.

Edit template is greyed out.

Why it happens: A run is in progress, or the template is archived.

What to do: Wait for the run to finish, then try again. An archived template cannot be edited.

Repeat this shift is greyed out in the **Add shift** window.

Why it happens: The site has an active Smart Rostering pattern. The window says **Managed by the site's active Smart Rostering pattern**.

What to do: Change the pattern on the **Templates** tab, or use the **Automation pattern** section of a single shift.

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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