Custom Templates for PebblePocket

Custom templates can now be added to PebblePocket. This tipsheet outlines the process and some of the limitations that you need to be aware of.

How it works

The basic steps involved in having your custom templates added to PebblePocket are as follows:

- You design your template in Pebble+
- You share your template with PebblePad Support with collaborate permissions
- Support access the asset ID of the template and add this to PebblePocket under a drop-down with your institution logo on it
- All users from your institution will see the institution drop-down when they login to PebblePocket and will have access to all custom templates that appear under it

These steps will now be described in more detail – **please read all of the information below before you start the process.**

**Step 1: You design your template**

We recommend that all templates designed for PebblePocket are categorised as Worksheets as this is the only supported template category. If you use another template category no icon will be displayed next to the template name in PebblePocket.

**Not all template element types are supported in PebblePocket** so it is essential that you design your template accordingly. If you include an element type that is not supported it will not be visible in PebblePocket.

Supported elements are as follows:

```
Single line text field

Please enter a hint or description...
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Multi line text field

Please enter a hint or description...

Date picker

Please enter a hint or description...

Radio buttons

One from many

- radio 1
- radio 2
- radio 3

Add radio button

Checkboxes

Many from many

- checkbox 1
- checkbox 2
- checkbox 3

Add checkbox

Dropdown

Select from dropdown list

- menu option 1
- menu option 2
- menu option 3

Add menu option
Unsupported elements will appear in PebblePad when you are creating the template, but they will not appear when the template is viewed in PebblePocket. They will become visible in the template asset when viewed in Pebble+.

**Notes about tagging**
Tagging is currently not possible in PebblePocket but you can pre-tag the template resource and by selecting the option in the properties panel to ‘Cascade tags’, the tags will automatically be added to any assets create from the resource.

Also note that currently a locked asset cannot be subsequently tagged so if locking is required the only tagging option with PebblePocket is for the resource to be pre-tagged.

**Things to consider when designing your template:**

- PebblePocket will typically be used on a mobile phone so the screen will be small and even a short template will involve quite a bit of scrolling. Be mindful of this when you decide on the number of items to include in your template.

- Writing a lot of text is not easy on a mobile device so consider how you can include more radio button, checkbox, and dropdown questions rather than lots of text fields.

- Separate hint fields are not supported so you will need to use the element hint fields to provide instructions.

- Digital signatures are designed to lock the asset upon signing so ensure that, if used, they are the final element of the template.

**NB:** Please note that while the asset remains locked while on PebblePocket, once it has been sent to Pebble+ it will take on the setting that you have assigned to it in the template builder. The options are for it to remain locked or for the signature to be removed or have a warning with it if the asset is subsequently edited in Pebble+. The default is for the warning to be shown so you must change this if you want locking to persist.

**NOTE:** We recommend that you liaise with your organisation’s PebblePad Consultant about your custom templates prior to sending them through to Support. Your Consultant will be able to offer useful advice on element choice and design.
Step 2: Share your template with PebblePad Support

PebblePad Support need access to your template to get the asset ID so that this can be added to PebblePocket.

**TOP TIP**
The template on PebblePocket continues to be linked to the original that you created and so any changes made to the original will flow through to PebblePocket. This means that you need to be very careful to not accidently edit the template as this will impact not only on the template on PebblePocket but also any assets that users have created from the template. We therefore recommend that you create a separate Pebble+ account to house all templates that are added to PebblePocket. This has the additional benefit that the templates are not ‘owned’ by any one person and are not impacted by someone leaving the institution.

We suggest the following steps for sharing your template with PebblePad Support:

- Create a new Pebble+ account specifically for your PebblePocket templates (your PebblePad Administrator will be able to assist with this). For the purposes of this tipsheet we will call this your ‘Pebble+ Pocket account’.

- Create your templates within this account or share them to this account, with copy permissions, from your own account.

- From the Pebble+ Pocket account share the template with PebblePad Support with **collaborate** permissions.

- In the share message let Support know that this template is for PebblePocket and include the email address of the person they should liaise with (this may not be obvious from the details of the PebblePocket account). Also include the name of the consultant you have been working with and the support ticket # where relevant.

**NOTE:** If this is the first PebblePocket custom template for your organisation you will also need to provide Support with an organisation logo to be added to the dropdown menu.

Step 3: Support add template to PebblePocket

Upon receiving your template Support will check the design and, if necessary, inform you of any required or recommended changes. You can make these changes in your Pebble+ Pocket account.
Support will then add your template to a PebblePocket test organisation for your region so that you can test it out. You will be provided with login details for this organisation. When you go to your PebblePocket app you will need to logout of your current organisation by going to Settings > Account Information. You will then need to select the correct test organisation from the drop-down list – it will be PebblePocket AUS, PebblePocket CA, PebblePocket UK or PebblePocket US, depending upon which region you are in. Once you have selected the correct organisation enter your new login details.

Once logged in you will see a drop-down menu with your institution logo and your template will appear under this. On this test organisation you may see drop-downs for other institutions in your region (AUS, CA, UK, or US). Please be mindful that the templates under the other menus belong to those institutions and are not to be used or replicated without their knowledge or express permission.

Once you have fully tested the template and are happy with it Support will add it to your organisation so that it becomes visible to all of your users when they login to PebblePocket. At this point it will also be removed from the test organisation.

**Step 4: Custom template is visible to all of your users in PebblePocket**

When the first custom template is added to PebblePocket for your organisation Support also create a drop-down menu with your logo on it.

You will need to provide support with an organisation logo that is a maximum width of 258 pixels and height scaled accordingly.

All custom templates from across your organisation will appear under this one drop-down menu. There is currently no mechanism for restricting templates to cohorts or creating sub-menus.

Given these limitations it is important that your organisation has a process for deciding which templates need to be added to PebblePocket. As Pebble+ can be used on any mobile device when connected to the internet, PebblePocket only becomes important when there is limited or no internet access. While many programs might want to have custom templates in PebblePocket you may need to put some restrictions around this to avoid your institution drop-down becoming crowded with large numbers of potentially similar templates and causing confusion for your users.
Note for when introducing the new templates to students:
If you are introducing the new templates to a large group of students in class there can sometimes be a bit of a delay before the templates appear in PebblePocket. In Settings in PebblePocket there is an option to ‘Only send large assets on wifi’. If this is turned on, all students will be drawing upon the local wifi at once to download the new menu item and associated templates. Depending upon the quality of the wifi there may be delays for some students.