UMMS Pride List

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Functionality

This block is specifically used for listing those that wish to be included on the UMMS Pride List page that is located in the DIO site. It can be re-used elsewhere but it has a very specific purpose. The block consumes a CSV file, that is exported from an Episerver form that was created with specific fields.

Upon form submission, an email will be sent to the addresses specified on the Form properties as well as an email to the person who submitted the form. A confirm will show on the screen which is editable within the form in the CMS.

Create New block:

Note: once this block is created, you will not need to update it. Simply export the CSV file from the form and overwrite the CSV file in the Media Panel

- Navigate to the Block folder where you wish to add this block and click New Block
- Populate the Name of the block and choose the UMMS Pride List Block

Pride List Block

This block consumes a CSV file, exported by an Epsierver form on the DIO site, to display a list of faculty, staff, students, and alumni
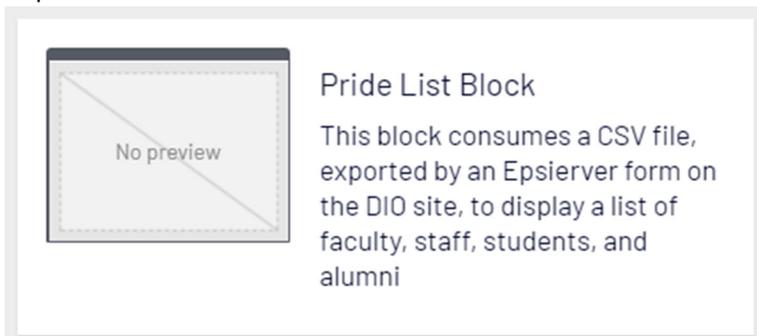
- Populate the CSV File field by dragging and dropping the CVS file from the Media Panel
  - If you have not created the file yet – steps are below
- Publish the block

- Add your new block a page

The CSV file

- Navigate to the Pride List Request Form in the CMS
  - QA: https://qaedit-www.umassmed.edu/episerver/cms/#context=epi.cms.contentdata:///458982&viewsetting=viewlanguage:///en
  - PROD: not yet created
- Click on the Form Submissions from the properties icon

- You can now view the form data
  - Manage the data as needed (delete older duplicates if any updates were submitted)
- Click on the download icon and choose CSV
  - Make sure the filters are clear and you are viewing all the data, not a subset of the data

- Once the CSV file has finished downloading, navigate to that folder on your computer
  - You may want to open the CSV file in Excel and review the data to make sure you have all the data
- In the CMS, navigate to the Media folder where you wish to store the CSV file
  - Drag and drop the CSV file to the folder
    - If this is replacing (updating) the file, it will ask you if you wish to replace the file, click Replace File

Note: if this was an update to the list, check the page on the website, any updates should be reflected in the list

How to Handle Update Form Submissions

- When a form submission is tagged as UPDATE, navigate to the form and view the data

- Search for the last name or some specific identifier to find the previous record

- You can review the updated info
  - NOTE: if for some reason there is missing data, reach out the person to re-submit the form or you can re-submit the form yourself
  - The data can not be updated through this view within the CMS
- Delete the previous record so that will not display in the list and the new one will
- Clear the filter (search field) and resubmit the search to display all the data again
- Export the CSV file (steps above)

Editing the Form

https://qaedit-www.umassmed.edu/episerver/cms/#context=epi.cms.contentdata:///458982

- When editing form fields, you can change the Label or popup hints
- If you need to add/remove fields, please consult with IT
  - Removing fields could cause the listing page to break
  - Adding fields will not display on the listing page, IT will need to update the code
- Edit the email properties to change TO, FROM, SUBJECT LINE or BODY contents
  - Add additional emails if needed
- Review and Export the form data
  - Delete duplicate data when forms are submitted as "UPDATE" then export the form (steps above)
- Review online documentation on FORMS
  https://www.umassmed.edu/it/services/web-services/episerver/blog/?ftag=Forms

For Review and Testing

View

- Form: https://qaedit-www.umassmed.edu/dio/initiatives/umass-lgbtq/registration-pridelist/
- Listing Page: https://qaedit-www.umassmed.edu/dio/initiatives/umass-lgbtq/pride-list/

Edit

- Edit Episerver form: https://qaedit-www.umassmed.edu/episerver/cms/#context=epi.cms.contentdata:///458982
  - Edit the form
  - Review the data
  - Update email TO, FROM, SUBJECT or BODY

- Edit listing page:
- CSV file in media:
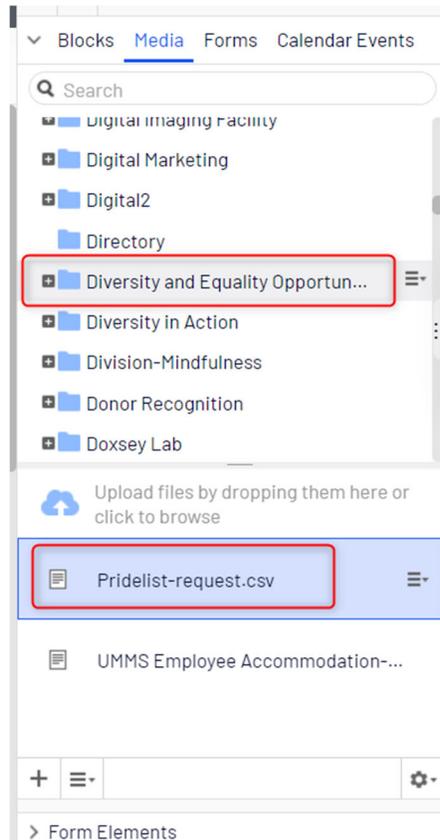
Form Fields:

- First and Last Name
- Degrees
- Group to be listed under (Faculty, Stuff, Alumni, etc)
- Email
  - If Group = Alumni, note displays an email can be used
  - If Group is anything but Alumni, note displays asking for umassmed or memorial email to be used
- To show or hide email on listing page
- Last year attended (displays on If Group = Alumni)
- Position
- Department
- Gender
- Orientation
- Pronouns
- Profile image
- Url to web page (Linkedin, etc)
- Captcha field to prevent bot submissions

List Page displays:

Displays in card grid, 2 columns in wide views, 1 column in small device view.

- Image if exists

- Height will set to a max of 250px high
- Width will only ever expand the max of the column it is in
- Can add a note on the form that images can be:
  - Max width: 345px
  - Max height: 250px
  - Should be optimized for web
- Firstname Lastname, degrees (gender, orientation) *and with link if set*
- Position
- Department
- Email (will show as "click to show email" so spambots won't capture)
- Pronouns