

Columbia University Finance Communications Training

Job Aid: How to Use an Accordion

This job aid details the process of editing, deleting, or creating an accordion content block. It is designed for users who make edits to the following websites: Finance; Travel & Expense; Student Financial Services; Registrar; Student Service Center; and University Policies.

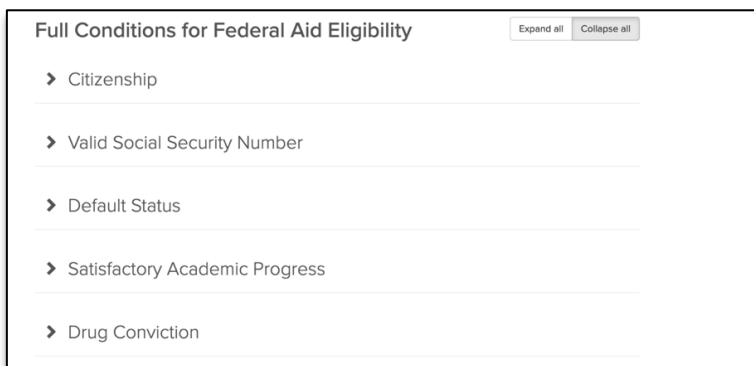
What is an accordion content block?

An accordion content block is a way content owners can condense information on a page. Users click on each topic item in the list, marked by an arrow icon, to expand the view and find more information about the topic. Each accordion topic item may contain a text box, an image, and/or a table.

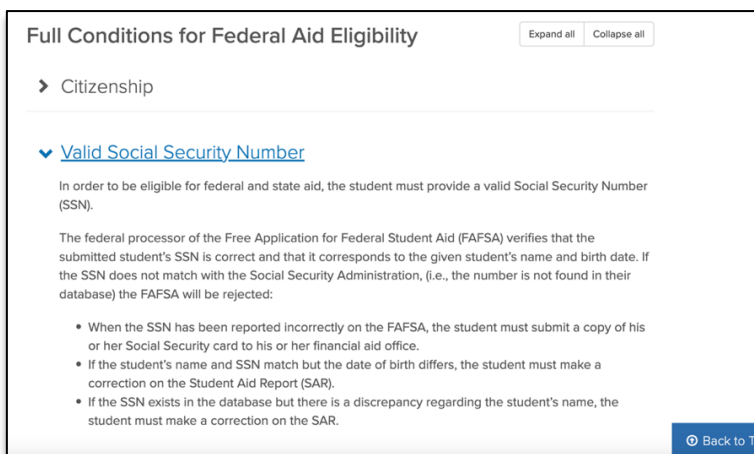
Accordions are used to minimize the amount of content—mainly text—that users see when they first encounter a page. Accordions also organize related information into groupings or procedures, so users find exactly what they are looking for in a logical manner.

Accordion content blocks may only be used on basic pages and never landing pages.

Example: Accordion content block (collapsed)



Example: Accordion content block (expanded)



How do I delete an accordion content block?

1. Log in to the **site you're trying to edit**. To log in, go to the homepage URL and type "/user" at the end of the URL (do not include the quotation marks), then hit **Return** to navigate to that page. You will be asked to authenticate, which will log you into the site and return you to the homepage.
2. Look for the editor ribbon on the page and select **Edit**. This ribbon is toward the top of the page underneath the main navigation menu. It will only appear if you are logged into the site. Once you click **Edit**, you will be taken to

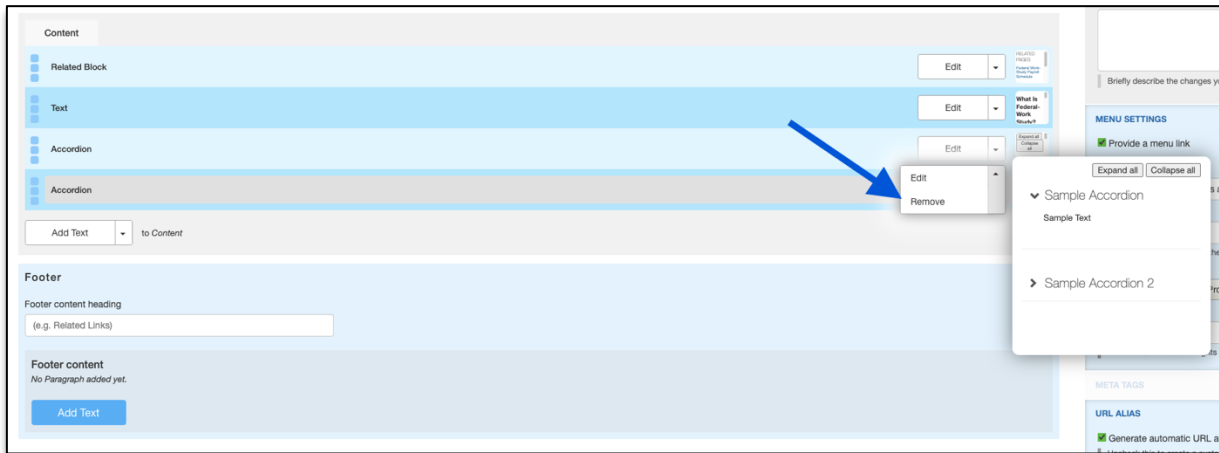
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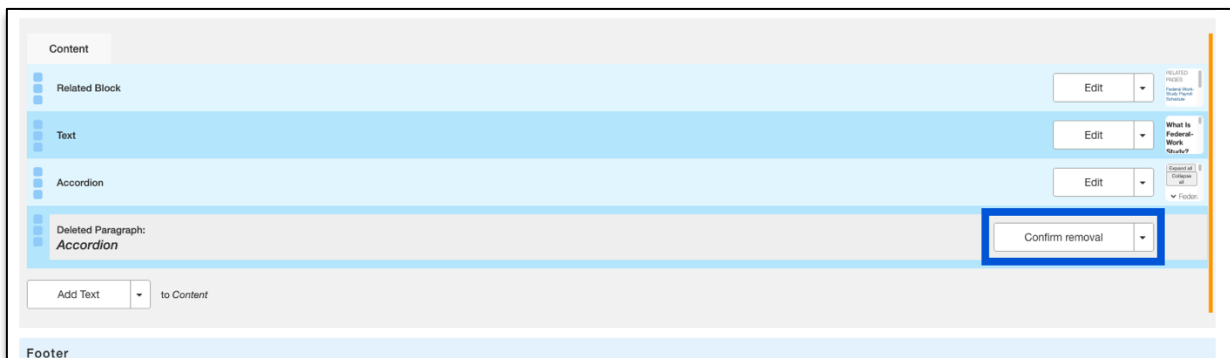
a backend editor's view of the page.



3. On the backend of the basic page, you will find your editor options. Scroll down to the series of content blocks. Find the accordion you would like to change. If you wish to remove the entire accordion from the page, click the **arrow pointing down** to find more options, including the option to **Delete**.
4. To **Delete** click on the arrow next to the edit button of the accordion you want to delete. A drop-down menu will appear prompting you to edit or remove the accordion. Click **Remove**. Click



5. You will be prompted to confirm you would like to remove the accordion content block. Click **Confirm**.

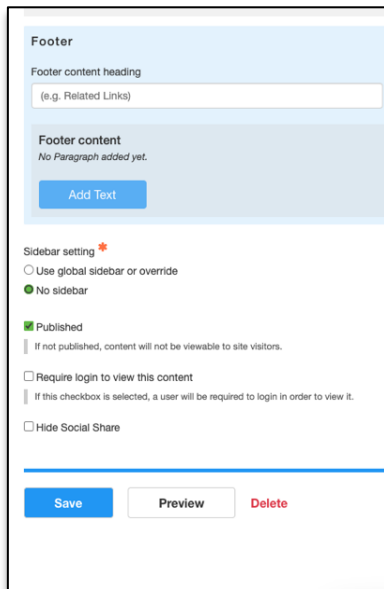


*NOTE: IN THE ABOVE EXAMPLE, THERE ARE TWO DIFFERENT ACCORDION CONTENT BLOCKS NEXT TO EACH OTHER. TO DETERMINE WHICH ACCORDION HAS THE INFORMATION YOU WANT TO CHANGE, HOVER YOUR CURSOR OVER THE THUMBNAIL IMAGE NEXT TO THE **EDIT** BUTTON. THE THUMBNAIL WILL APPEAR LARGER AND SHOW YOU A PREVIEW OF THAT CONTENT BLOCK.*

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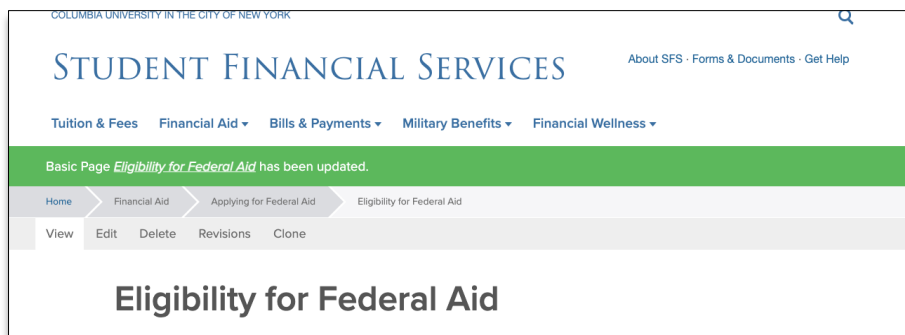
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6. Selecting **Delete** will not immediately remove the accordion. You must scroll to the bottom of the page and click **Save**, which will immediately record your changes and return you to the normal user's view of the webpage, reflecting your new updates to the page.



The screenshot shows a 'Footer' editing interface. It includes a text input field for 'Footer content heading' with the placeholder '(e.g. Related Links)'. Below this is a section for 'Footer content' with the text 'No Paragraph added yet.' and an 'Add Text' button. The 'Sidebar setting' section has two radio buttons: 'Use global sidebar or override' (unselected) and 'No sidebar' (selected). There is also a 'Published' checkbox (checked) with a note: 'If not published, content will not be viewable to site visitors.' Below that are two unchecked checkboxes: 'Require login to view this content' and 'Hide Social Share'. At the bottom, there are three buttons: 'Save' (blue), 'Preview' (white), and 'Delete' (red).

7. After you select **Save**, you will be brought back to the user view of the page you edited. There will be a green bar near the top navigation to alert you the page has been updated. Your new changes will appear immediately on the page.

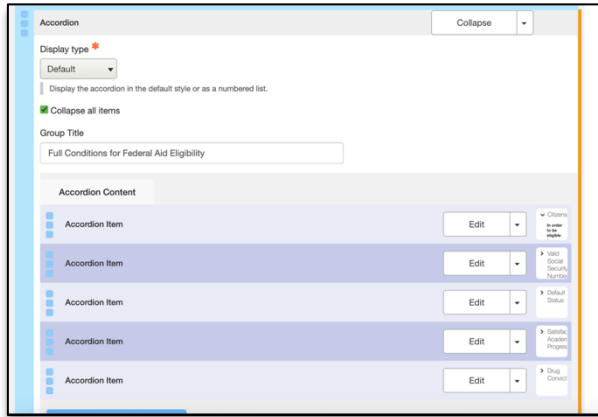


How do I edit an accordion content block?

1. If you need to change elements of an accordion instead of deleting the whole content block, click the accordion's **Edit** button. This will open the accordion content block and all the individual accordion items will be displayed in addition to different display settings and the optional group title.
2. Find the accordion item you would like to edit. Click **Edit** to change the title of the accordion item or to change content within the accordion item. A single accordion item may contain a text box, an image, and/or a table.

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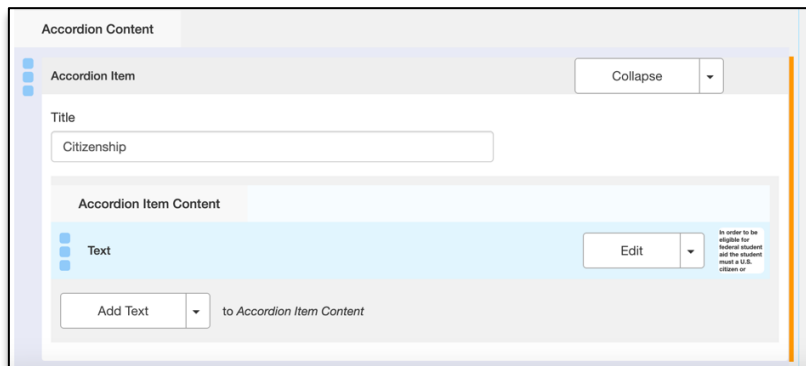
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3. To delete a single accordion item from the list, choose the option with the **arrow pointing down** and select **Delete**.

*TO DETERMINE WHICH ACCORDION ITEM HAS THE INFORMATION YOU WANT TO EDIT, HOVER YOUR CURSOR OVER THE THUMBNAIL IMAGE NEXT TO THE **EDIT** BUTTON. THE THUMBNAIL WILL APPEAR LARGER AND SHOW YOU A PREVIEW OF THE CONTENT.*

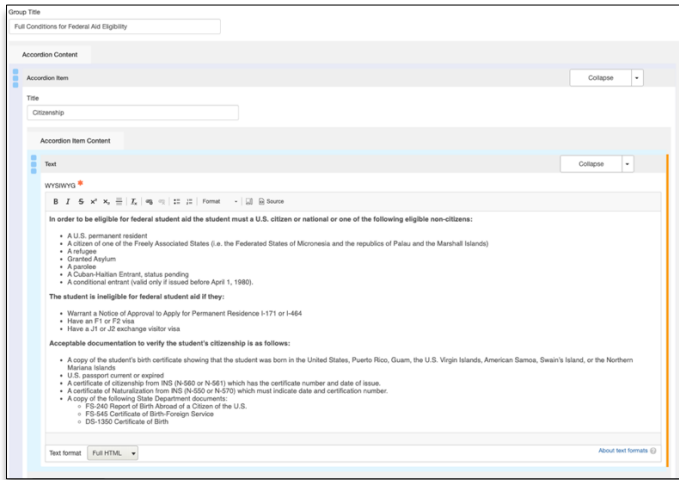
4. To change a text box, image, or table within a single accordion item, click **Edit** within the appropriate content block.



5. An open text box ready to edit will appear as follows:

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6. Make your changes to the text while remembering to follow appropriate accessibility rules when it comes to header usage and hyperlinking. When you are done making changes, scroll to the bottom of the page and click **Save**.

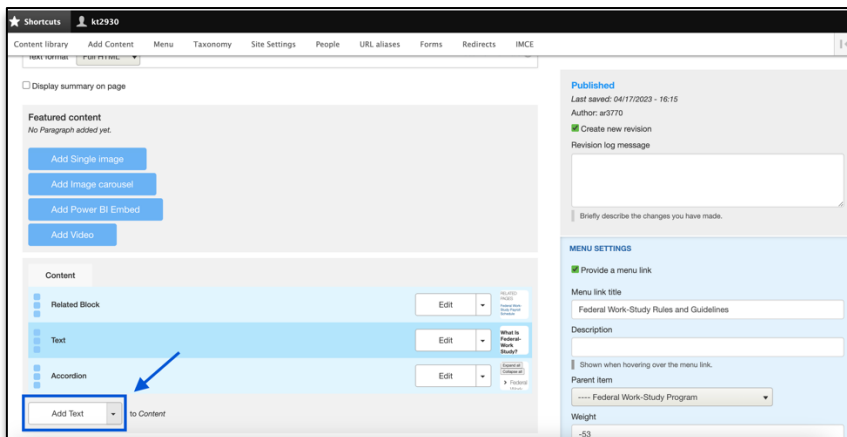
WHILE EDITING AN ACCORDION, YOU MAY NEED TO MAKE MULTIPLE EDITS TO DIFFERENT CONTENT BLOCKS ON THE PAGE. YOU DO NOT NEED TO SELECT SAVE FOR EVERY CHANGE YOU MAKE.

YOU CAN MAKE MULTIPLE CHANGES ON THE PAGE BEFORE CLICKING SAVE AND ALL EDITS WILL BE RECORDED.

WAITING TO SAVE UNTIL ALL UPDATES TO THE PAGE ARE COMPLETE IS A WAY TO BE MORE EFFICIENT WITH YOUR TIME ON THE PAGE.

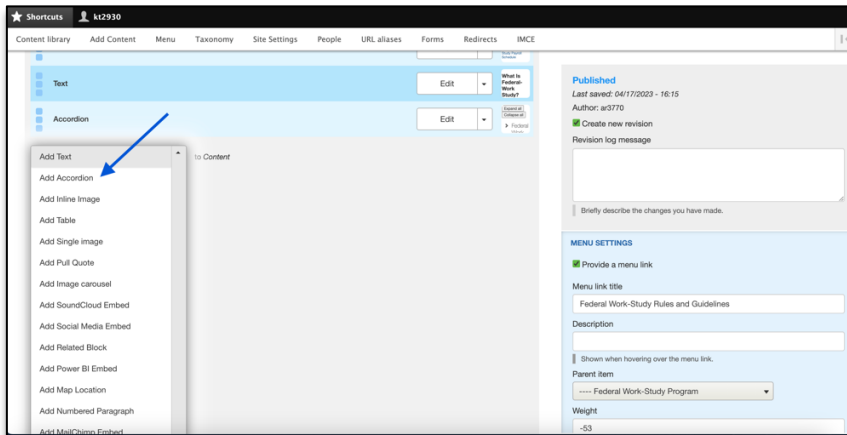
How do I create a new accordion content block?

1. Log in to the **site you're trying to edit**. To log in, go to the homepage URL and type “/user” at the end of the URL (do not include the quotation marks), then hit **Return** to navigate to that page. You will be asked to authenticate, which will log you into the site and return you to the homepage.
2. Look for the editor ribbon on the page and select **Edit**. This ribbon is toward the top of the page underneath the main navigation menu. It will only appear if you are logged into the site. Once you click **Edit**, you will be taken to a backend editor's view of the page.
3. On the backend of the basic page, you will find your editor options. Scroll down to find the **Add Text** button. Click the arrow on the right side of the text. A drop-down menu will appear.

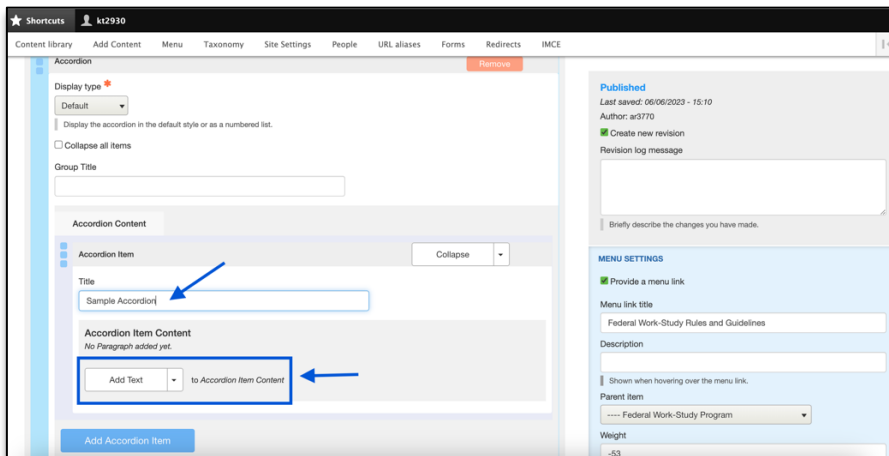


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4. **Click Add Accordion** The new accordion content block will appear. The accordion content block will be opened to the first content item within the accordion. Fill out the **Title field** to give your accordion a title. Click **Add Text Box**. Add the content to the text box within the accordion. The text box is a required field. This means you must add text to the text box in order to save the new accordion.



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Accordion Item Content

This red asterisk means the field is required. You must include text in the WYSIWYG to save the accordion.

Text Remove

WYSIWYG *

Sample Text

body p

Text format Full HTML About text formats ?

Add Text to Accordion Item Content

Add Accordion Item

Published

Last saved: 06/06/2023 - 15:10

Author: ar3770

Create new revision

Revision log message

Briefly describe the changes you have made.

MENU SETTINGS

Provide a menu link

Menu link title

Federal Work-Study Rules and Guidelines

Description

Shown when hovering over the menu link.

Parent item

---- Federal Work-Study Program

Weight

-53

- To add another accordion item, click the **Add Accordion Item** and repeat the above steps. The finished accordion will look like this:

Expand all Collapse all

Sample Accordion

Sample Accordion 2

Student Financial Services
Studebaker Building, 615 West 131st Street · New York, NY 10026

Student Service Center
Kent Hall, 1140 Amsterdam Avenue · New York, NY 10027

Get Help
Policies

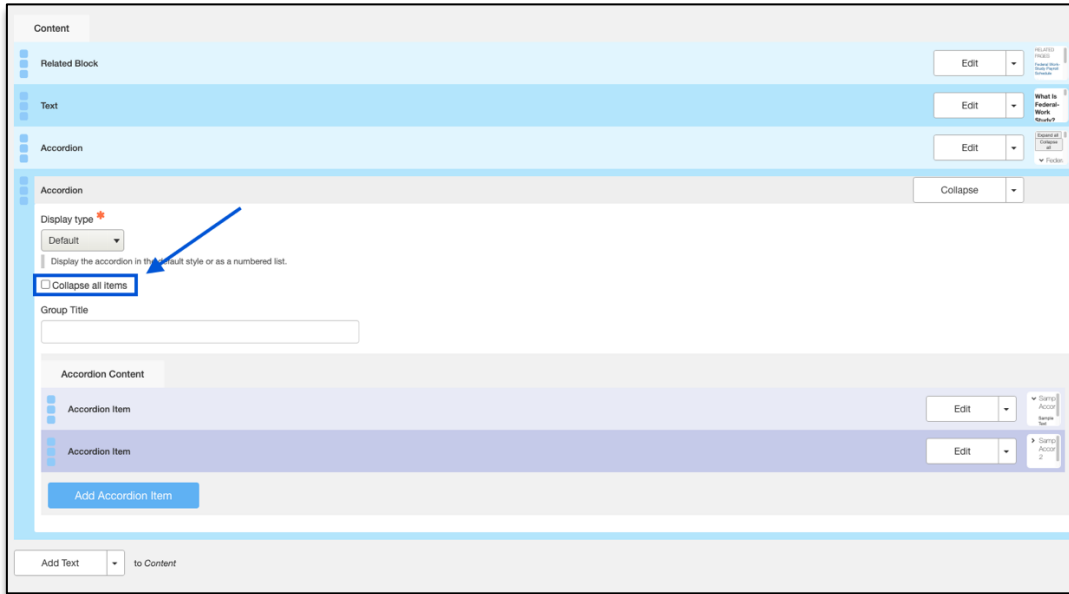
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- New accordions default to have the first accordion item expanded. If you would like to make all accordion items collapsed, click the checkbox on the backend that says **Collapse All Items**.

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*WHILE CREATING A NEW ACCORDION, YOU MAY NEED TO MAKE MULTIPLE EDITS TO DIFFERENT CONTENT BLOCKS ON THE PAGE. **YOU DO NOT NEED TO SELECT SAVE FOR EVERY CHANGE YOU MAKE.***

YOU CAN MAKE MULTIPLE CHANGES ON THE PAGE BEFORE CLICKING SAVE AND ALL EDITS WILL BE RECORDED.

WAITING TO SAVE UNTIL ALL UPDATES TO THE PAGE ARE COMPLETE IS A WAY TO BE MORE EFFICIENT WITH YOUR TIME ON THE PAGE.

Getting Help

While editing a page, if you accidentally delete the wrong content and need to start over, simply click the **back arrow** in the top left of your browser or close out of the browser tab or window completely.

As long as you do not save any mistakes you will not publish any mistakes.

If you need assistance creating, editing, removing, or recovering an accordion on your website, please contact the Finance Web Team at financewebteam@columbia.edu with a **summary of your needs**.