

Columbia University Finance Training

Job Aid: Editing on the Finance Website

This job aid provides guidance for web editors designated by Finance departments. It details the responsibilities of a web editor, and points users to more detailed resources for step-by-step instructions on how to edit specific web elements.

Web Editor Responsibilities

Your responsibility as editor is to make simple text edits and add necessary elements to existing pages, with the approval of your department content owner.

	Content Owner (your department)	Web Editor (you)	Finance Web Team	Columbia Sites Team (CUIT)
Approves text changes, manages department page.	X			
Makes text edits and adds web elements to department owned pages.		X		
Creates new pages, manages updates to shared topics pages.			X	
Troubleshoots technical issues				X

Accessing “Editing mode” on the Finance Website

If you’ve been assigned as a web editor by your department head, you should have editing access, enabling you to edit and access revision history of pages.

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**.

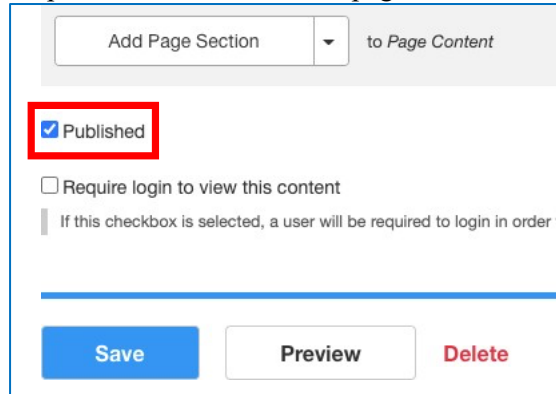
1. In the site address at the top of the web browser, add **“/user”** to the end of the URL so it appears like this:
<https://finance.columbia.edu/user>
2. Simply login using your **UNI** credentials.

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A screenshot of a login form. At the top left is a blue arrow icon followed by the text "UNI". To its right is a text input field containing a vertical cursor. Below this is the label "PASSWORD" followed by another empty text input field. A horizontal line separates the input fields from the bottom section. On the bottom left is the text "UNI Help". To its right is a blue button with the text "LOGIN" in white, followed by the text "clear".

3. Select **Edit** or **Revisions** to begin editing. Editors are discouraged from deleting or cloning pages. If you need to remove a page, select **Edit** and uncheck the **Published** option at the bottom of the page near the Save button.



Note: The process outlined in Step 2 will need to be repeated whenever editing a page or viewing an unpublished page.

Web Editing Training Resources and Guides

There are a variety of University resources available to editors who are interested in maintaining and/or making changes to their respective areas of the Finance site.

Columbia Sites User Guide

Visit <https://sites.columbia.edu/content/user-guide> for step-by-step guidance on how to edit or add various elements to web pages. Additionally, this guide walks users through accessibility and editorial guidelines.

Website Editing Trainings and Workshops

Visit <https://sites.columbia.edu/events> to search Columbia Sites' event calendar for website trainings. Of note, the Finance Website is built on the Administrative Model. Workshops are available for every experience level from Basics to Advanced, Finance Website editors are encouraged to participate in workshops focusing on either All Models or the Administrative Model. Additionally, editors can take advantage of weekly office hours offered by Columbia Sites.

Web and Identity Guidelines

Visit <https://visualidentity.columbia.edu/> for guidance and resources related to brand identity, Columbia logos, color palette, typography and usability.