

Columbia University Finance Training

Job Aid: How to create and edit a table

This job aid details the process of editing, deleting, or creating a table 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 a table content block?

A table content block is a way content owners can organize data and information on a page.

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

Example tables:

View the Current Payroll Schedule

Payroll #	Due Date	Period Covered	Check Date
Payroll # BWK 21-029	Monday, 07/19/2021	07/01/2021 - 07/18/2021	07/23/2021
Payroll # BWK 21-031	Monday, 08/02/2021	07/19/2021 - 08/01/2021	08/06/2021
Payroll # BWK 21-033	Monday, 08/16/2021	08/02/2021 - 08/15/2021	08/20/2021
Payroll # BWK 21-035	Monday, 08/30/2021	08/16/2021 - 08/29/2021	09/03/2021
Payroll # BWK 21-037	Monday, 09/13/2021	08/30/2021 - 09/12/2021	09/17/2021
Payroll # BWK 21-039	Monday, 09/27/2021	09/13/2021 - 09/26/2021	10/01/2021
Payroll # BWK 21-041	Monday, 10/11/2021	09/27/2021 - 10/10/2021	10/15/2021
Payroll # BWK 21-043	Monday, 10/25/2021	10/11/2021 - 10/24/2021	10/29/2021
Payroll # BWK 21-045	Monday, 11/08/2021	10/25/2021 - 11/07/2021	11/12/2021
Payroll # BWK 21-047	Thursday, 11/18/2021	EARLY PAYROLL 11/08/2021 - 11/21/2021	11/24/2021
Payroll # BWK 21-049	Monday, 12/06/2021	11/22/2021 - 12/05/2021	12/10/2021
Payroll # BWK 21-051	Friday, 12/17/2020	EARLY PAYROLL 12/06/2021 - 12/19/2021	12/23/2021
Payroll # BWK 22-001	Thursday, 12/30/2021	EARLY PAYROLL 12/20/2021 - 01/02/2022	01/07/2022
Payroll # BWK 22-003	Friday, 01/14/2022	EARLY PAYROLL 01/03/2022 - 01/16/2022	01/21/2022
Payroll # BWK 22-005	Monday, 01/31/2022	01/17/2022 - 01/30/2022	02/04/2022
Payroll # BWK 22-007	Monday, 02/14/2022	01/31/2022 - 02/13/2022	02/18/2022
Payroll # BWK 22-009	Monday, 02/28/2022	02/14/2022 - 02/27/2022	03/04/2022
Payroll # BWK 22-011	Monday, 03/14/2022	02/28/2022 - 03/13/2022	03/18/2022
Payroll # BWK 22-013	Monday, 03/28/2022	03/14/2022 - 03/27/2022	04/01/2022
Payroll # BWK 22-015	Monday, 04/11/2022	03/28/2022 - 04/10/2022	04/15/2022
Payroll # BWK 22-017	Monday, 04/25/2022	04/11/2022 - 04/24/2022	04/29/2022

Period 11 (May) Close

Wednesday, May 31, 2023	FY23 Period 11 (May) Accounts Payable closes.
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Tuesday, June 6, 2023	Last day for FY23 Period 11 (May) integration of system feeds.
Wednesday, June 7, 2023	FY23 Period 11 (May) GL closes to Schools and Departments: Please make sure all journals are approved and posted by 5 p.m. to be included in the closing process.
Wednesday, June 7, 2023	Payroll: Weekly and Biweekly for period end 6/4/2023 are split between FY23 Period 11 (May) and Period 12 (June) and viewable in FDS the following day.
Wednesday, June 7, 2023	FY23 Period 11 (May) PAC Labor Accounting closes.
Thursday, June 8, 2023	FY23 Period 11 (May) GL closing processes are executed by the Controller's Office: All journal entries that are not posted for FY23 Period 11 (May) are rolled forward into the following period and receive a journal date of 6/1/23.
Monday, June 19, 2023	University Observance of Juneteenth

How do I delete a table 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,

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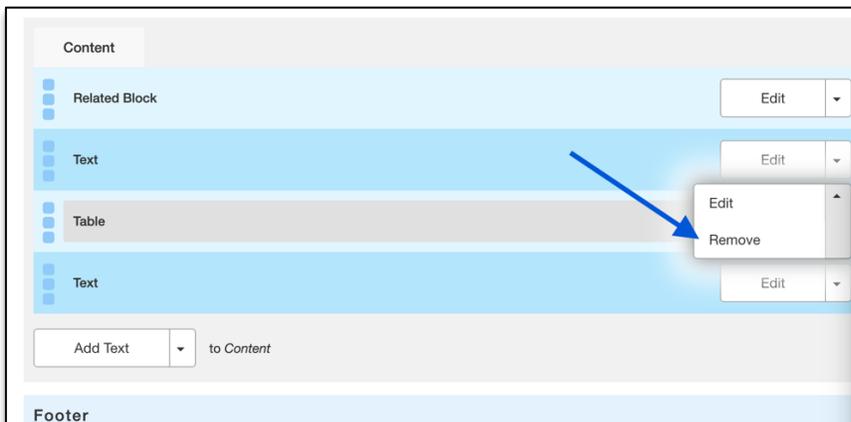
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which will log you into the site and return you to the homepage.

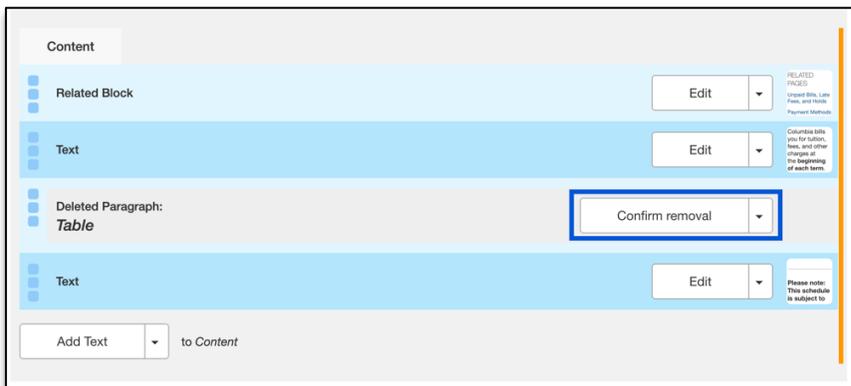
2. Look for the editor ribbon on the page and select **Edit**. This ribbon is toward the top of the page underneath the main navigation menu. It will only appear if you are logged into the site. Once you click **Edit**, you will be taken to a backend editor's view of the page.



3. On the backend of the basic page, you will find your editor options. Scroll down to the series of content blocks. Find the table you would like to change. If you wish to remove the entire table 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 table you want to delete. A drop-down menu will appear prompting you to edit or remove the table. Click **Remove**.



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



6. Selecting **Delete** will not immediately remove the table. 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.

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The screenshot shows a 'Footer' editing panel. At the top, there is a 'Footer content heading' field with the placeholder '(e.g. Related Links)'. Below this is a 'Footer content' section with the text 'No Paragraph added yet.' and an 'Add Text' button. The 'Sidebar setting' section includes radio buttons for 'Use global sidebar or override' and 'No sidebar', with 'No sidebar' selected. There are also checkboxes for 'Published', 'Require login to view this content', and 'Hide Social Share'. At the bottom, there are 'Save', 'Preview', and 'Delete' buttons.

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.

The screenshot shows the 'STUDENT FINANCIAL SERVICES' website. A green notification bar at the top states 'Basic Page Eligibility for Federal Aid has been updated.' Below the navigation menu, there is a breadcrumb trail: Home > Financial Aid > Applying for Federal Aid > Eligibility for Federal Aid. A toolbar contains buttons for 'View', 'Edit', 'Delete', 'Revisions', and 'Clone'. The main heading is 'Eligibility for Federal Aid'.

How do I edit a table content block?

1. If you need to change elements of a table instead of deleting the whole content block, click the table's **Edit** button. This will open the table's content block and all the individual accordion items will be displayed.

The screenshot shows a 'Table' editing interface. It includes an 'Options' section with a checkbox for 'Sortable table columns'. The 'Table Title' is 'Period 11 (May) Close'. Below the title is a brief caption: 'This brief caption will be associated with the table and will help screen reader better describe the content within.' The table content is as follows:

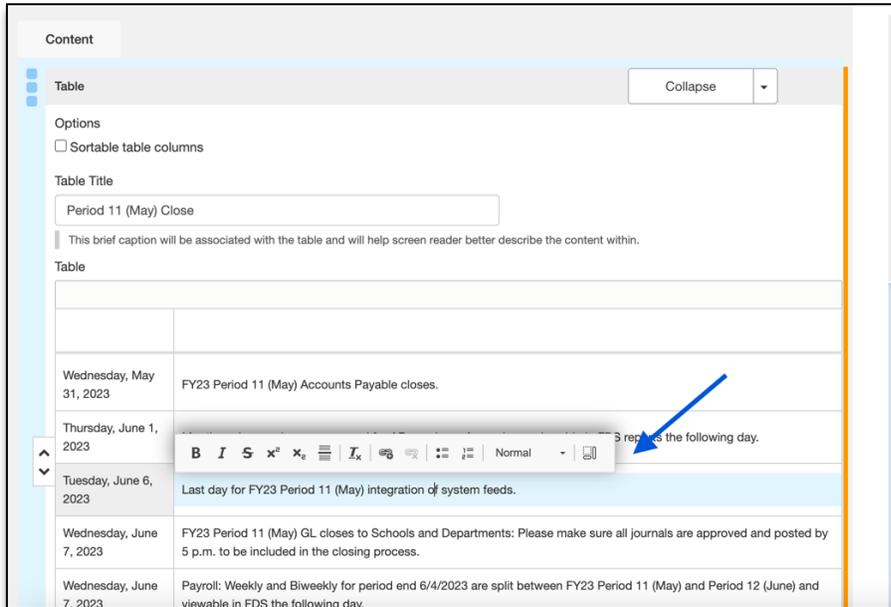
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Below the table, there are fields for 'Change number of rows/columns.' and 'Import from CSV'. A note at the bottom states: 'The first row will appear as the table header. Leave the first row blank if you do not need a header.'

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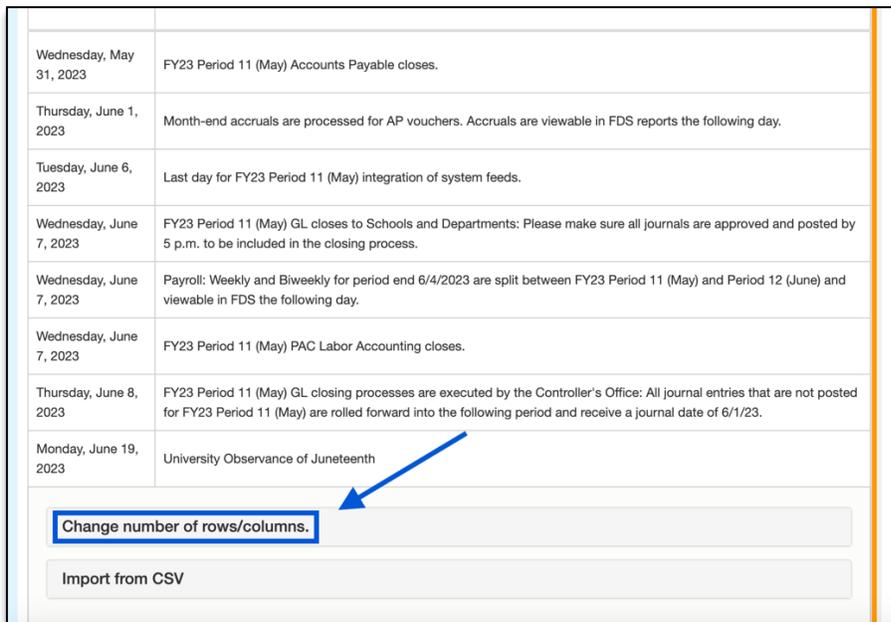
2. Click on the cell within the table. The cell that you're working in will be highlighted blue and a toolbar will appear above the cell. Edit the text you'd like to edit.



The screenshot shows a table editor interface. At the top, there is a 'Content' tab and a 'Table' section with a 'Collapse' button. Below this, there are 'Options' (including a checkbox for 'Sortable table columns') and a 'Table Title' field containing 'Period 11 (May) Close'. A note states: 'This brief caption will be associated with the table and will help screen reader better describe the content within.' The table itself has several rows. The second row is selected, and a floating toolbar appears above it. The toolbar includes icons for bold (B), italic (I), strikethrough (ABC), text color (x), background color (x), bulleted list, numbered list, link, unlink, and a 'Normal' dropdown. A blue arrow points to the selected cell in the table.

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3. To edit the table size (how many rows/columns) scroll down to the button of the table and click the line change number of rows/columns.



The screenshot shows the same table editor interface as above, but with the table expanded to show more rows. A blue arrow points to a button labeled 'Change number of rows/columns.' located at the bottom of the table. Below this button is an 'Import from CSV' button.

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4. Insert the new number of rows and columns you'd like for your table. Click rebuild table.

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Change number of rows/columns.

How many Columns
2

How many Rows
9

Rebuild Table

Import from CSV

The first row will appear as the table header. Leave the first row blank if you do not need a header.

5. 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.

Footer

Footer content heading
(e.g. Related Links)

Footer content
No Paragraph added yet.
Add Text

Sidebar setting *

Use global sidebar or override

No sidebar

Published
If not published, content will not be viewable to site visitors.

Require login to view this content
If this checkbox is selected, a user will be required to login in order to view it.

Hide Social Share

Save Preview Delete

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STUDENT FINANCIAL SERVICES About SFS · Forms & Documents · Get Help

Tuition & Fees Financial Aid Bills & Payments Military Benefits Financial Wellness

Basic Page Eligibility for Federal Aid has been updated.

Home Financial Aid Applying for Federal Aid Eligibility for Federal Aid

View Edit Delete Revisions Clone

Eligibility for Federal Aid

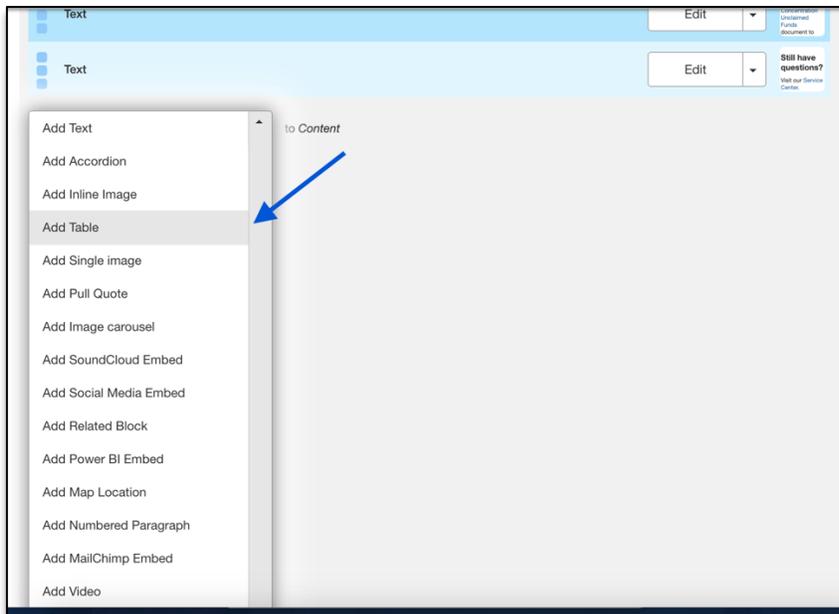
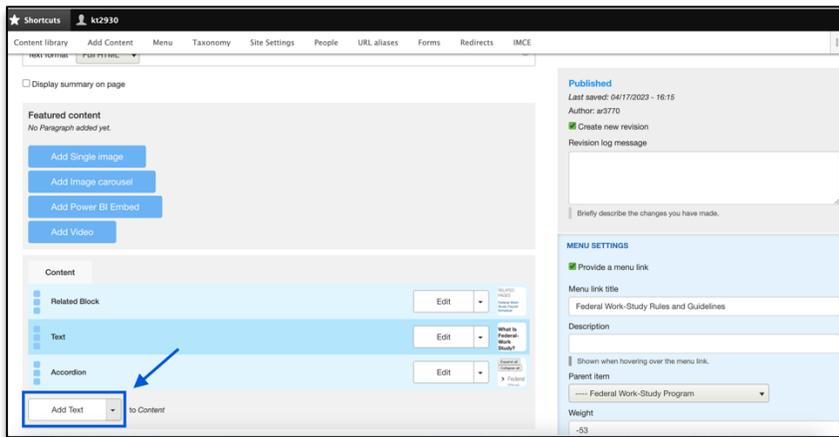
*WHILE EDITING A TABLE, YOU MAY NEED TO MAKE MULTIPLE EDITS TO DIFFERENT CONTENT BLOCKS ON THE PAGE. **YOU DO NOT NEED TO SELECT SAVE FOR EVERY CHANGE YOU MAKE.***

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 table 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.



4. **Click Add Table** The new table content block will appear. The table content block will be opened to a blank 5x5 table. Fill out the **Title field** to give your table a title. Add the content to the table's field.
5. To **edit** the table size (how many rows/columns) scroll down to the bottom of the table and **click** the line **change number of rows/columns**. Insert the new number of rows and columns you'd like for your table. **Click rebuild table**.
6. 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.

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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 a table on your website, please contact the Finance Web Team at financewebteam@columbia.edu with a **summary of your needs**.