THE OFFICIAL Joomla! {book}

SECOND EDITION

Jennifer Marriott
Elin Waring

Foreword by Mark Dexter,
Joomla! Production Leadership Team

Joomla! press

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The Official Joomla!® Book

Second Edition

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The Official Joomla!® Book

Second Edition

Jennifer Marriott
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To my husband, Pete

—Jennifer

To Tom, Bobby, and Linnea

—Elin

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Foreword to the Second Edition

There are many different books about Joomla! Some are in the form of tutorials or user manuals for Joomla! beginners. Some are more technical and go into depth about programming for Joomla! or creating templates. Who is this book for?

The Official Joomla!® Book takes a different approach from other Joomla! "how-to" books. Instead of focusing solely on using Joomla!, *The Official Joomla!® Book* focuses on building a real-life Web site using Joomla! If you want to buy one book to help you get your Joomla! Web site up and running from start to finish, this is the book.

It covers everything a new Joomla! user needs to know to get a real-life Web site up and running. To me, the best thing about this book—and what makes it absolutely unique—is that it includes a lot of topics not normally covered in Joomla! books.

For example, someone building a real Web site needs to think about issues like trademarks, branding, and how to plan the site. These topics are covered in Chapter 2. Most Web site publishers want their site to be as popular as possible. Chapter 9 includes important information about how to market your Joomla! Web site to the widest possible audience.

You hope your Web site has a long life. If so, it will require maintenance and updates. Chapter 10 covers how to back up your site and how to keep it up-to-date as Joomla! and your third-party extensions are updated over time.

Three chapters present practical information about the three most common types of Web sites. Chapter 11 covers Web sites for a business. This includes nuts-and-bolts information about e-commerce extensions and payment systems, shopping cart systems, and simple "brochure" sites.

Chapter 12 covers Web sites for nonbusiness organizations, such as NGOs, nonprofits, and clubs. This includes practical advice about using your organization's Web site for creating a community, event calendars and event registration, user forums, customer relationship management, and fund-raising.

Chapter 13 covers building a Joomla! Web site for educational organizations, such as schools or universities. It includes tracking documents, calendars, contacts and faculty information, and learning extensions.

Each of these chapters includes valuable, hard-won, real-world information gleaned by the authors through their long years of experience with Joomla! Web sites. This is information that you will not find in any Joomla! documentation, tutorials, or simple "how-to" book.

Finally, the Joomla! Project is about people and community. To help bring this to life, Chapter 14 includes interviews with a number of different Joomla! community members. This helps the reader to better understand the community and how the project works (and maybe even to become a Joomla! contributor).

The second edition of this book was created to cover the Joomla! version 3.x series of releases. Version 3.0.0, released in September of 2012, was the first major release since the adoption of the Joomla! Project's time-based release strategy. Version 3.1 will be released in March of 2013, and new 3.x releases will continue until the release of 3.5 in 2013 or 2014. At that point, version 3.5 will be the long-term-support release and will be supported by the project for at least two years.

The good news for readers of this book is that this book's information will be current and fully relevant at least until 2015.

What is the Joomla! release cycle and how does it work? As a community-driven open source project, Joomla! must balance the needs of two different communities: users and contributing developers. Most Joomla! users want a stable, predictable release schedule. When they deploy a Web site, they want to know that the version is well tested and reliable and will have a reasonably long time between major updates.

Contributing developers are volunteers who write new features for the Joomla! core programs. The main motivation these contributors have is to see their code used. Therefore, to attract and retain these developers, it is important that their contributions be accepted and incorporated into the program on a timely basis. To do this, a relatively frequent release schedule is needed.

The Joomla! release cycle accommodates the needs of both groups by having two separate release paths. The long-term-support (LTS) path is designed to give users stable versions with relatively infrequent updates. The current LTS release at the time of this writing is version 2.5. This was released in March 2012 and will be supported until 2014, at which time users will update to version 3.5.

The standard-term-support (STS) path is designed to accommodate contributing developers. STS versions are released every six months, so new features can be rapidly incorporated into the program. This allows contributors to see their code used, which is a major motivating factor for these volunteers. The STS release path is also good for some users who require the latest feature set available.

Version 3.0, on which this edition of the book is based, is the foundation for the entire 3.x series. There will be incremental changes in future 3.x versions, but the vast majority of the information for 3.0 will be true for the entire series. Hence the timing of this edition.

Do you want to build a real-life Web site using Joomla!? If so, congratulations! You have the right book.

—Mark Dexter
Coauthor, *Joomla!™ Programming*
Member, Joomla! Production Leadership Team

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Foreword to the First Edition

Joomla! is steeped in a rich and sometimes controversial history. During its tumultuous start in August of 2005, no one could have imagined how far this little project would stretch in terms of reach, nor could anyone have imagined how much it would grow in terms of depth of participation and resources available to the community. I still vividly remember the day I published the now-famous "Open Letter to the Community" that you find in Chapter 1 of this book. Those were uncertain times for the 19 founders and 100 or so members of the forum team to leave comfortable surroundings and start over with nothing but courage and raw determination.

Today, I am writing this foreword having just attended a 200-person-strong local conference in San Jose, California, and my compatriot across the table is off to Italy to address 700 at a similar event. These are but two of dozens of such events held all around the world each year, on every continent (except Antarctica, of course, but maybe one day), to celebrate as a community this amazing thing called Joomla! The right words are hard to find, but one is certainly appropriate: Wow!

Joomla!'s mission is "to provide a flexible platform for digital publishing and collaboration." To that end, and at the time of this writing, we have 64 official languages; hundreds of professional service providers; over 6,000 (that we know about) Joomla! extensions; thousands of template designs to choose from; and tens of millions of Web sites deployed all around the world. Joomla! is arguably the easiest software program of its type—both to use and to master. It has been designed both for the most basic user and for the master artisan who wants to take a site beyond the normal limits of the core download. Joomla! carries a legacy of a user interface with pleasing eye candy and a wide choice of the most beautiful templates available for any site-building system in the world. Particularly close to my heart is our passion for continuing to improve the way in which we deliver Joomla! to more and more people in their own languages.

All together by name and all together by nature, Joomla! (meaning "all together" in Swahili) sought from the very beginning to ensure it would be free for the entire community at its founding and into the future. It was set up deliberately to ensure that no one person could ever "own" Joomla!, a detail that gives Open Source Matters—the Joomla! nonprofit—the freedom

to provide stewardship in the best interests of the project rather than a parent company's bottom line. Combined with the two main project leadership teams for software production and community management, Joomla! as a whole has one of the most progressive and mature leadership structures of any open source project.

Five years after its founding—and on the heels of both Microsoft and eBay becoming collaborators and contributors to the Joomla! core source code—we begin another phase in our life journey as a project: the inception of Joomla! Press and the first (with extreme emphasis on "first") official Joomla! book. Joomla! is about allowing ordinary people to do extraordinary things, and that is exactly what the authors of this book do for its readers.

So, without further ado, I present this book for your pleasure. It begins with how we began and takes you on a journey through which you can be empowered to reach the world.

—Andrew Eddie
Member of the Joomla! Production Leadership Team
October 2010

Preface

When planning what should be in a book about Joomla!, we thought hard about what process we go through when building Web sites and when helping others build sites. What we decided is that this book should be about building a Web site using Joomla! rather than how to use Joomla! to build a Web site. Even though you can make a Web site using Joomla! in a few hours (or less), most likely it won't be a great site nor will it allow you take advantage of the power of Joomla! The focus should always be on how you envision your site, the goals of the site, and the audiences you wish to reach rather than on the technology used to create it.

Fortunately, with its combination of power and ease of use Joomla! lets you keep your focus on the big picture of your site and the small details of your content and not on mastering a complicated set of processes. This is why we start with a thorough discussion of things to think about before you start building your site.

We've also built a set of very simple sample sites that will give you a good idea about the initial process of thinking about and then building sites for various purposes. We hope that you'll follow along with the construction of those sites so that you understand the process that site developers use. If you do these first, you will be ready to build your own site with confidence and a good plan.

In addition, we try to help you have a basic understanding of how Joomla! really works "under the hood," so that when you are ready to take advantage of the power that comes with its extensibility you will have the knowledge you need. We think that, like us, you will want to steadily increase the sophistication of your site and your knowledge and understanding of Joomla! So we've written this book with the idea of giving you a strong foundation for the future of your site and other sites you may build in the future. Free and open source software is empowering, but you have to have solid knowledge of the fundamentals to take advantage of it.

We're passionate about Joomla!, and we hope that you will be too. That's why we take time in this book to introduce you to the Joomla! Project and the Joomla! community. We hope that you'll want to become an active participant in the Joomla! world. And we hope that you enjoy building your site so much

that you end up building other sites for friends, family members, and organizations or causes you care about.

How This Book Is Organized

Joomla! empowers you to produce a beautiful, content-rich, usable site yourself. We wrote this book to help you do just that. It is organized to follow the process of building a Web site in a sequence that is similar to what a Web professional would use. It is not designed to produce an instant Web site, but rather to take you through a process that will end up with a site that will work for you and your users for the long term, whether you keep it simple or decide to make it more complex. We emphasize building a solid understanding of tools that you use in building a Joomla! site so that you have the power to use them on your own.

We start in Chapter 1 with what Joomla! is and why you would use it for your site. Then in Chapter 2 we turn to the planning work you should do before you start creating your site, ranging from planning the design to choosing a host. Next, in Chapter 3 we show you how to install Joomla! yourself.

Chapter 4 starts with the process of actually working with Joomla!, beginning with configuration. Chapters 5 and 6 continue to get you started with creating your site's content by showing you how to work with the variety of tools Joomla! offers, including components, modules, plugins, and languages.

Chapters 7 and 8 turn to managing the design of your site by working with Joomla! templates. Chapter 7 explores the core templates in depth and explains how to use built-in customization features. It also explains how to modify them to meet your site's needs and gives you an introduction to HTML and CSS that will empower you to create and maintain the appearance of your site. Chapter 8 walks you through the process of creating a simple template from scratch.

Chapters 9 and 10 move to making your site successful and managing it for the long term. Chapter 9 looks at how to effectively market your site to the target audience you have identified. It covers how to manage a growing site, maintenance, and the effective use of navigation. Keeping your software up-to-date and your site content safely backed up is absolutely essential for the long-term health of your site, and Chapter 10 explains in detail how to manage these.

Chapters 11, 12, and 13 go through the process of building a basic site from start to finish. Using a small business, a nonprofit club, and a school as examples, each chapter explores how to put all of the elements of a site—the core of Joomla!, extensions, and a template—together to create a site that works for you and for your users. We encourage you to follow along with building each

of these sites step by step so that you can follow a similar process when building your site.

One reason we love to use Joomla! to build Web sites is because of the people who make up the Joomla! community. In Chapter 14 we introduce you to some of those people, and we hope that you like them as much as we do. They give great advice and information about their areas of expertise, ranging from marketing to security to software development. We also hope that you will join the Joomla! community too.

A note about Joomla! versions in this book. This book covers the use of both Joomla! 2.5 and Joomla! 3. Although the two releases look very different, the functionality is essentially the same. In places where there are major differences between the two we have noted that. Many of the images where there are not major differences show Joomla! 3.0 since Joomla! 3 will be the main release for the time that this book will be in print. However, if you would like images for Joomla! 2.5, you can get them at our Web site, *http://officialjoomlabook.com*. If you are using Joomla! 2.5, you may want to use Chapter 13 (the school) in particular since that chapter uses images from Joomla! 2.5 as the base with examples from Joomla! 3 where there are important differences. If future releases of Joomla! 3 make important changes, you will also find information about them on our Web site.

Finally, check our Web site for information on and downloads of any extensions used in the sample sites that are not available for your version of Joomla!

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Acknowledgments

This book benefited greatly from the help of many people, named and unnamed. We thank them for their assistance.

We especially thank all the contributors to the Joomla! Project who have worked together so hard to produce and support this amazing software. All of the people we interview in Chapter 14 have taught and inspired us day in and day out, many since the day Joomla! was born, and we are lucky to consider them friends, too. Thanks to Brad Baker, Gary Brooks, Chris Davenport, Mark Dexter, Nicholas K. Dionysopoulos, Vic Drover, Andrew Eddie, Louis Landry, Ian MacLennan, Sam Moffatt, Ryan Ozimek, Angie Radke, Wendy Robinson, Ron Severdia, Marijke Stuivenberg, and Andrea Tarr. There are dozens of others whose knowledge we have built on, including Michael Babker, Michelle Bisson, Anthony Ferrara, Lorenzo Garcia, Javier Gomez, Leslie Hawthorn, Gabrielle Heller, Dave Huelsmann, Alan Langford, Rob Schley, Toni Marie Swats, Jean-Marie Simonet, James Vasile, Rouen Weβling, and others.

We also thank all those participants in the Joomla! forums who answered our questions and asked us their own questions, and contributors to the Joomla! Official Documentation wiki, both of which taught us how to use Joomla! in more depth. The Joomla! Bug Squad has been a continuous source of inspiration.

Then there are the people who really made this book possible. Pete and Tom, our families, Linnea and Robert, and the Odd Sheep who were so supportive and put up with a lot while we were writing. Also, to our numerous friends who were given a sudden introduction to Joomla! and who gave of their time to read chapters and give encouragement and suggestions, thank you.

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About the Authors

Jennifer Marriott is the Director of Global Support for *CloudAccess.net*, the official hosting provider for *demo.joomla.org*, as well as being the host and support system for some of the largest Joomla!-based sites in the world. Jennifer joined the Joomla! community during the beginning days in 2005 and began volunteering as a forum moderator shortly thereafter. Over the years she has taken on various roles in the community in addition to moderator, such as Joomla! Bug Squad member, Joomla! Google Summer of Code co-administrator and mentor, and Trademark and Licensing Team Leader. Although Jennifer has stepped down from her official roles in the Joomla! Project, she remains an active community member.

In addition to her work in all things technology related, Jennifer is a professional musician. She has three CDs released. You can find her music in various places all over the interwebs.

Elin Waring is a longtime Joomla! user and former president of Open Source Matters, the nonprofit organization that provides legal, financial, and organizational support to the Joomla! project. In that role she led a number of initiatives ranging from writing the translation policy to obtaining a trademark for the Joomla! brand. She has made more than 7,500 posts on the Joomla! forums and wrote most of the Frequently Asked Questions for Joomla! 1.0. She is an active member of the Joomla! Bug Squad and participates in many Joomla! events.

Elin is a professor of sociology at Lehman College, City University of New York, where she teaches research methods. She has written or coauthored a number of books, including *White-Collar Crime and Criminal Careers* (Cambridge University Press, 2001), *Crimes of the Middle Classes: White-Collar Offenders in the Federal Courts* (Yale University Press, 1991), and *Russian Mafia in America: Immigration, Culture, and Crime* (Northeastern, 2001), as well as scholarly articles in the areas of white-collar crime, organized crime, and social organization.

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5

Working with and Creating Content for Your Joomla! Site

Now that you have a basic Web site installed, you are ready to start organizing the content of your site using Joomla! In this chapter we will explain the use of the Joomla! Content component to create articles and organize them into categories. We will demonstrate key features and procedures. The patterns you learn in the Content component will apply in other components.

Defining Content

The Content component is the most important component for creating what visitors and users will see on your Web site. Articles are the basic form of content. Articles are organized into categories. This terminology comes from traditional print models, where a newspaper might have News, Sports, Business, and Features categories, and those categories might have different subcategories, such as local and national news in the News section, baseball and basketball in the Sports section, the stock market and retail business in the Business section, and home furnishings and cooking in the Features section. In your site you may have many sections or just one. You may have many categories or just a few. What is important is to understand how to use the Content component and to have a good plan for organizing your articles.

From the Control Panel in the administrator back end, go to the Content menu and click Article Manager. This will open the Article Manager screen. Figure 5.1 shows how the Article Manager screen is organized and what functions you can perform while in this area of your site, with two main parts that give you control over your content. The first is the icon menu bar (1), and the second is the Filter options (2). Note that in Joomla! 3 the Filter options and submenu are arranged vertically while in Joomla! 2.5 they are arranged horizontally. The other important difference is that in Joomla! 2.5 batch processing

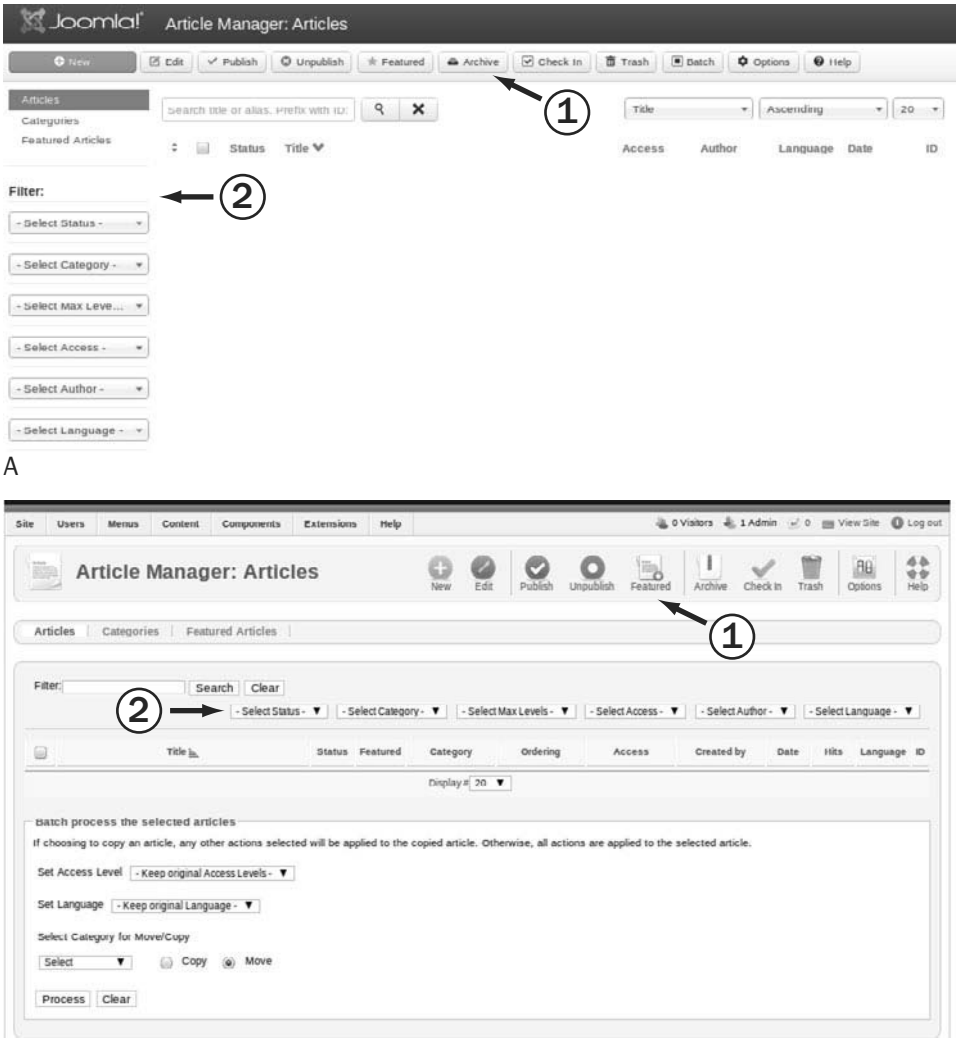


Figure 5.1 Article Manager (1) menu icons and (2) filtering options for (A) Joomla! 3 and (B) Joomla! 2.5

options are located at the bottom of the screen, while in Joomla! 3 clicking the Batch button on the toolbar will open a modal window.

Here are the Article Manager icons:

- *New*: Clicking New allows you to create a totally new article. This opens the article in the back-end editing screen. Once you have entered

the contents of the article you are creating, click Save & Close to save the article and return to the Article Manager, or click Save to save your changes but leave the article open for further editing if you want to view your changes on the front end. If you have opened an article for editing by mistake, you can click Cancel to return to the Article Manager.

- *Edit*: This allows you to open an existing article to edit it. You use this by selecting the check box beside an article's title in the list of articles and then clicking Edit. This opens the article in the back-end editing screen. Once you have edited the article, click Save & Close to save the article and return to the Article Manager, or click Save to save your changes but leave the article open for further editing if you want to view your changes on the front end. If you have opened an article for editing by mistake, you can click Cancel to return to the Article Manager. Note that if you select Save before your article is ready to be seen by the public, you should make sure to change the status to Unpublished.
- *Publish*: This allows you to publish articles, meaning they will be visible on the front end of your site. You use this by selecting the check box beside an article's title in the list of articles and then clicking Publish. This works only on articles that are unpublished.
- *Unpublish*: This allows you to unpublish articles that have been published. You use this by selecting the check box beside an article's title in the list of articles and then clicking Unpublish. This works only on published articles.
- *Featured*: This allows you to mark a particular article as Featured, which means it will be displayed in the Featured view.
- *Archive*: This allows you to archive articles that you want to still be accessible, but only if they are accessed through either search or an archive menu link. You use this by selecting the check box beside an article's title in the list of articles and then clicking Archive. Archiving does not prevent editing of the articles. Archiving articles can improve the performance of your site dramatically if you have a large number of articles.
- *Check In*: An article is checked out when a user is editing it. This prevents two users from editing the same article at the same time, which would create problems when one of them saves. At times users may not close an article correctly and it will remain checked out. This button allows super users and administrators to check in articles. Note that users can always edit articles they have left checked out; it is only other users who are prevented from editing.

- *Trash*: This deletes an article from the Article Manager and puts it in the article trash. You use this by selecting the check box beside an article's title in the list of articles and then clicking Trash. This automatically moves the article selected to the article trash without any confirmation screen. To fully delete an article you need to then use the article filters to select trashed articles only. That will make the Trash button turn into a Delete button, and you can fully delete an article. At that point it will no longer be recoverable. It is important that you remember to periodically empty your trash; leaving items in the trash can cause problems, such as if you create a new article with the same name as a trashed one.

  You can restore an article that has been mistakenly trashed by filtering as you would for deleting, but instead of deleting the article change its state to Published, Archived, or Unpublished.
- *Batch*: Note that the Batch functionality is located at the bottom of the screen in Joomla! 2.5. Batch processing allows you to do certain tasks to multiple articles at the same time. These are:
  - *Set Access Level*: Access levels control what groups can see an article in the front end of your site. Each article has one assigned access level. The drop-down menu allows you to select a new access level for the items you have checked. We introduced the concept of access levels in Chapter 4.
  - *Set Language*: If you have multiple languages on your site, you can change the language assignments for articles.
  - *Select Category for Move or Copy*: Move and Copy are the most important and commonly used functions of bulk processing. Often as you work on your site you will decide to reorganize your content or make similar content in a number of different categories (or even the same subcategories within a number of different top-level categories). So the ability to move or copy many items at once is very useful. First pick the new category you want to move or copy to (the destination). Then select either Move or Copy. Click the Process button to complete the batch processing.

  If you copy and your selections create name conflicts because two articles have the same name in the same category, Joomla! will attempt to manage this, but you will still want to review the results and make sure they are exactly what you wanted.
- *Options*: This is where you can set the global article parameters that affect every content item in your site. Most of these article parameters can be overridden in two places: they can be overridden on individual content

items, and some can be set in the menu parameters, which can affect a group of articles that are linked from the menu. To open article options, click Options, and a new screen will open (in Joomla! 2.5 this will be a small modal box—a pop-up with a dark background that hides the rest of the screen). The options are organized into nine separate tabs. Don't worry if these seem overwhelming; you can leave them on their default settings until you decide you don't like the way something looks. At that point you will be glad that Joomla! provides so many options. We will review the nine tabs and highlight some of the most important options later in the chapter, after you have created some content.

- *Help*: Clicking this will open a Help screen with more information about these parameters.

You can also take advantage of various filtering options to find articles quickly when you are in the Article Manager. This is especially helpful for sites with large numbers of articles. The filtering options are as follows:

- *Filter*: Allows you to input text contained in the title of an article to do a search for any articles that may use that text as part of their title.
- *Select Status*: Allows you to filter articles by their state. There are four states that an article can be in: Published, Unpublished, Archived, and Trashed. By default the filtering selects both Published and Unpublished articles.
- *Select Category*: Allows you to filter your articles by choosing a specific category to display.
- *Select Max Levels*: Allows you to limit the number of levels of categories. This is mainly useful if you have a very deep nested category structure for your content.
- *Select Access*: Allows you to filter articles by the viewing access levels to which articles are assigned.
- *Select Author*: Allows you to filter articles by choosing a specific author to display.
- *Select Language*: Allows you to filter articles by the language to which they are assigned.

In Chapter 2 we gave you ideas for how to think about your site before you even start, so we hope that at this point you know how you want to organize your content. In this example we will reference a brochure-type Web site that is relatively simple. It will have information about the site or business, a blog category where content will be updated on a daily or weekly basis, a press

release category where visitors will find press releases regarding the site or business, some customer testimonials, and a contact form for visitors to get in touch with the site owner.

Managing Content

The first thing we will do is create some articles. Click on the New button. This will open an editing screen as shown in Figure 5.2. Fill in a title for your article (we'll call ours "First Article" for clarity's sake). Then in the large text area add some text. Notice that the article is already assigned to a category with the somewhat funny name of Uncategorised. Joomla! articles must always be assigned to categories, so this provides a catchall one for new sites that do not have their own categories. You will notice that there are tabs (in Joomla! 3) or sliders (in Joomla! 2.5) with many other options and also many additional buttons. If you look through them, you will see that they are either empty or set to Use Global or, in the case of Article Permissions, Inherited. As you learn more, you may want to modify these, but for right now we will leave them as they are. Click on Save & Close. Repeat this process at least two more times. At that point the Article Manager will appear as in Figure 5.3.

> **Tip**
>
> If you are stuck for ideas for text, you can visit a site such as *lipsum.com* to generate some filler text. This is something that site designers typically do so that they can focus on design rather than content creation.

Now open one of your articles. You can do this by clicking the name or checking the check box next to the name and clicking the Edit button. The Article Edit screen has quite a few options available, but for beginning purposes we will cover only the most important parts of the screen to get you started and give basic information regarding the more complex items. As you get more familiar with Joomla! and content editing, you will be able to decide whether the complex items are a benefit to your site.

First, notice that you can now modify the article if you want. Next, look at the Publishing Options tab or slider. Notice that some of the information that was blank before has now been filled in, including the alias (very important because it is used to create the URLs or links to specific pages on your site), the created date, the author (you), the publication start date (today), the publication end date (set to 0 by default, which means that there is no end date), and the revision number. With the exception of the revision number, you can modify any of these simply by editing the fields and then saving the article.

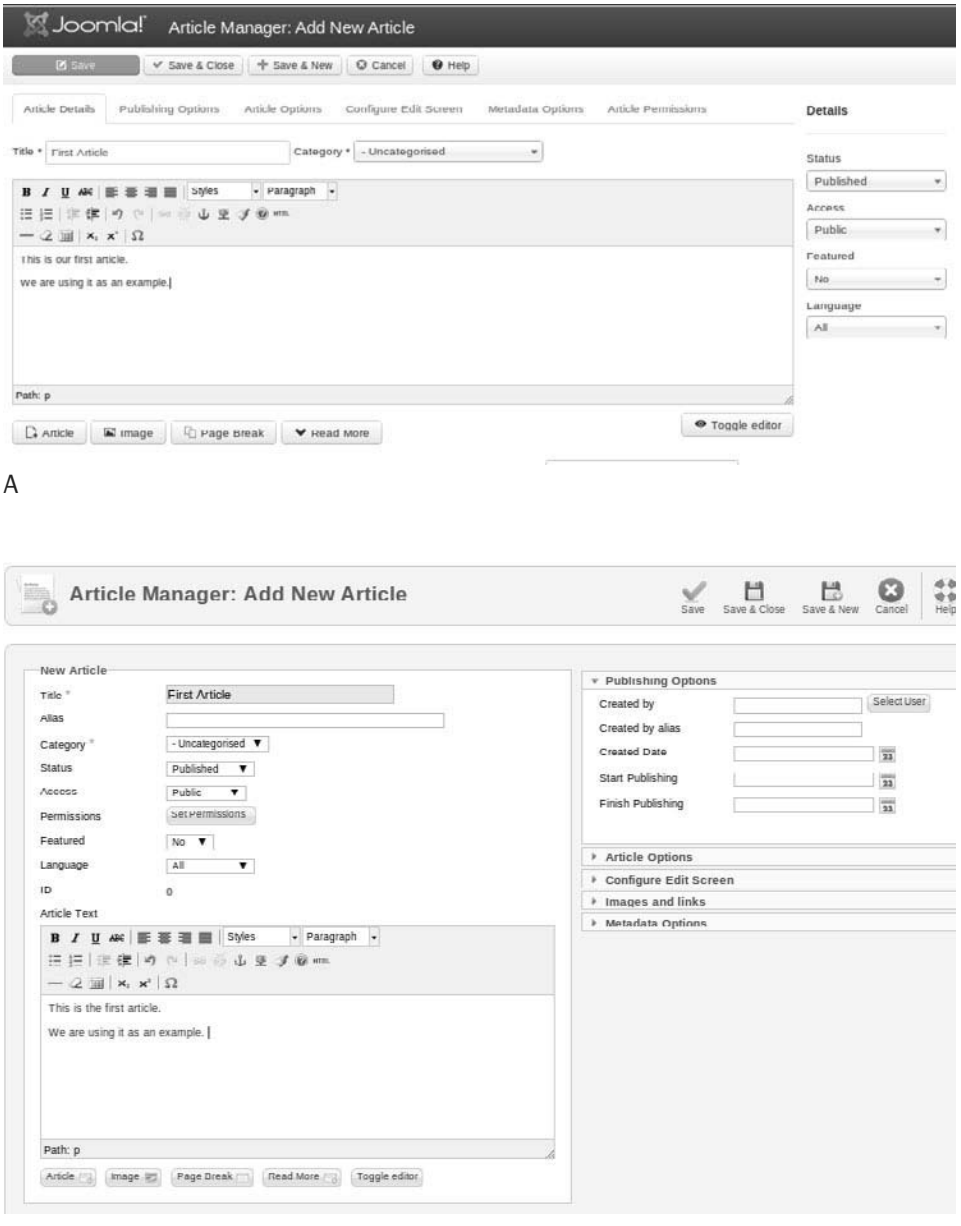


Figure 5.2 Empty article-editing screen as it looks when adding a new article: (A) Joomla! 3 and (B) Joomla! 2.5

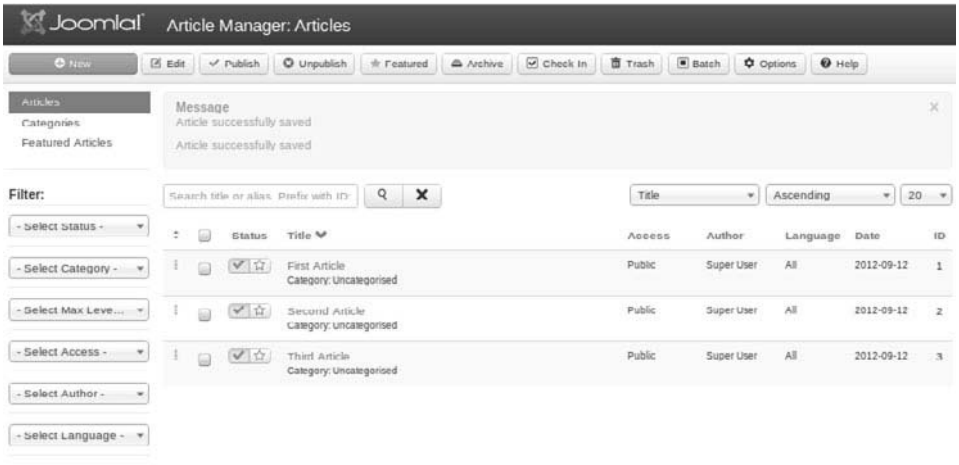


Figure 5.3 Article Manager with three articles added

However, most of the time you can just let Joomla! manage these fields for you. For example, you may want to change your alias if the title is very long, or you may have a specific idea about the URL you want for that article. An alias should never contain spaces (Joomla! won't allow you to save an alias that does), and underscores should be avoided (they can be hard to read), as should uppercase letters (users may mistakenly type the URL in the wrong case and not find your page), but other than that the choice is up to you.

The other tab or slider that you should always pay attention to is Metadata. Metadata provides search engines and other applications with information about the content of this specific article. Previously you created metadata that described the site as a whole, but usually you would like this to be more specific to help search engines identify individual articles to people doing searches. Fill in the description with one or two sentences and the keywords with between two and five terms. Keywords are used internally to find content items with the same keywords as other items and are also indexed by Smart Search, the Joomla! advanced search component.

Go back to the main tab for editing your article. Let's look at the details of this page more closely. There are a number of things to notice and important settings for the article on this page.

When you created your article and now that you are editing it, you are using the default editor that is installed with Joomla! It's a very popular Web content editor called TinyMCE. As shown in Figure 5.4, across the top of the editor you can see icons that represent the different editing capabilities that the editor has, which are very similar to the editing icons in most word processing

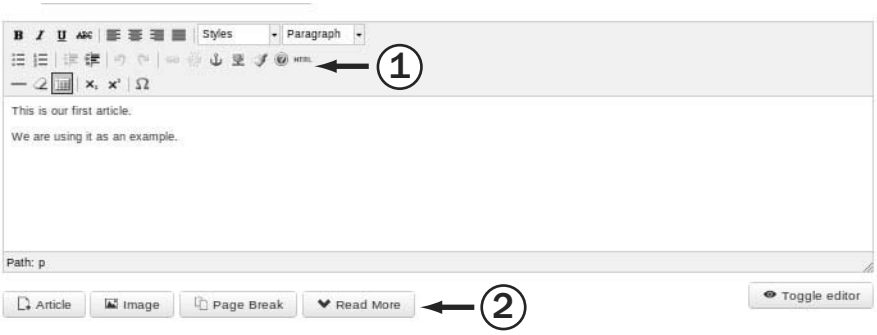


Figure 5.4 TinyMCE Editor with menu buttons above and below the editing area

programs and office suites. Hovering your mouse over each of the icons in the editor toolbars will supply a tool tip that will tell you what the editing function does (1).

Underneath the content text box are a number of buttons (2):

- *Article*: This is the button that allows you to link your article to another article on your site.
- *Image*: This is the button for the Media Manager, which will allow you to upload images to your Web site; you can also use it to place the images you have already uploaded into your Web site.
- *Page Break*: This is how you can break very long content items into a number of shorter pages through which the user can navigate inside the article itself. Joomla! will automatically create a navigational table of contents for your article using the page breaks to define the sections of the article.
- *Read More*: This is how you insert a link to the rest of the article if you want to show some introductory text instead of the full article on every page. Using Read More allows you to have teaser text to draw people into your site by encouraging them to click to see more of an article. In Joomla! people commonly refer to the first area as the intro text and the second as the full text.
- *Toggle editor*: This button toggles the editor between What You See Is What You Get (WYSIWYG) mode, which is a visual layout, and a code view mode, which shows your content item with the HTML tags that direct how the content will display. If you are familiar with simple HTML, you can format your content code using HTML tags.

Also on this main editing page are some very important settings. Status lets you assign this specific article to Published, Unpublished, Archived, or Trashed status. Access determines what viewing access level the article is assigned to. We introduced these in Chapter 4. Featured determines whether this article will be included in a featured article layout that you have the option of using. Featured layouts bring together selected articles from different categories. Language allows you to select a language for your content, but if you are using only one language on your site, you can simply leave all articles on the All setting. This option is used for multilingual sites and the All setting means that readers using all languages should see this article.

> **Tip**
>
> If you are editing a particularly long or complicated article, it is best practice to use the Save button periodically to save the changes you make. This will prevent you from losing the work you have completed if your session time expires. Save applies your changes and keeps the article you are working on open so that you can continue to edit it.

Working with the Media Manager and Inserting Images

Inserting pictures in the default installation of Joomla! requires two steps. You have to upload images using the Media Manager and then manipulate the picture properties with the "insert picture" editing button from the editor menu when adding or editing an article.

To insert an image into an article, you must first have an article open for editing. Once you have opened an article, click the Image button (below the editing text area). You can either upload one or more new images and then select one, or simply select an existing image, as shown in Figure 5.5.

Image Title is the text that will appear if a user moves the mouse pointer over the image. This is also the text that is used for the image caption if the Caption box is selected. Always fill in an image title. A screen reader for a blind person will read this out loud even if it is not displayed on the page.

Align is the location of the image on your page. Aligning an image to the left or right will place your picture to either the left or the right side of the text that is next to the image, allowing the text to wrap around the image.

To give the image a caption, just select the Caption check box. This will use the text entered in the Image Title field as the image caption, displayed below the image.

Figure 5.5 The editor Media Manager screen. Image Title is the text that will appear on the page if you choose to use a caption; otherwise it is used as the alternative text that will show upon hovering over an image.

In the full Media Manager that is linked at the bottom of the Content menu in the main Administration menu rather than the button, you can do these two additional actions:

- *Create*: Click the Create icon to create a new directory. This will create a new directory in the *images/* directory.
- *Delete:* Delete individual images and folders.

These can be very useful for organizing large numbers of images on your site.

After you have inserted an image using the Image button at the bottom of the screen, you can further manipulate the image using the Insert/Edit Image function accessed through the editor buttons located at the top of the editor screen; just select the image in the article and click the small picture icon in the toolbar. This will open a dialog box that will offer a few more options to manipulate the image, such as dimensions, borders, and vertical and horizontal space. Vertical and horizontal space is the amount of space that is around the outside of the image. Figure 5.6 shows the options available in the Insert/Edit Image dialog box.

Another way you can add images to articles is by using the image fields located at the bottom of the edit screen in Joomla! 3 or in a slider on the right in Joomla! 2.5. The first field assigns an image to the intro text area and the second assigns it to the full text area. The advantage of doing it this way is that you can have a consistent layout in all of your articles.

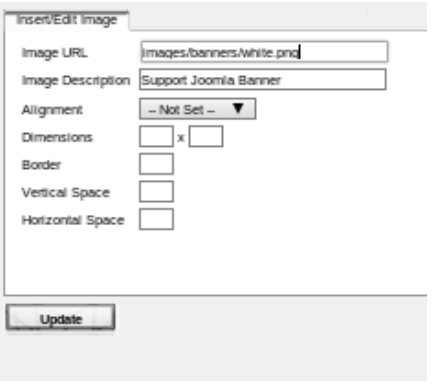


Figure 5.6 The Insert/Edit Image dialog box

Managing Categories

As mentioned earlier, all articles in Joomla! need to be assigned to categories. You can have as many categories as you want, and you can arrange the categories and subcategories to go as deep as you want. Creating and managing categories is very similar to creating and managing content.

Go to the Content menu, and navigate to Category Manager (or, if you are already in the Article Manager, you can click on the Categories submenu). This will open the Category Manager screen to show the list of all the categories that have already been created. Right now there is just one category, called Uncategorised, as shown in Figure 5.7.

Click on the name Uncategorised and the edit screen for categories will open. It is in most ways similar to the edit screen for an article. You have spaces to insert a title (required), an alias, and a description (optional). The

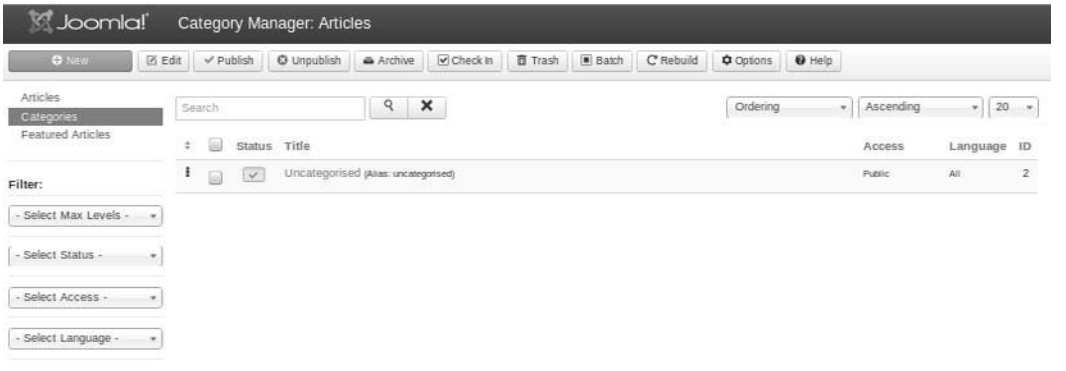


Figure 5.7 Category Manager showing the Uncategorised category

alias will be automatically generated if you leave the field blank, just as for an article. The one important difference is that instead of picking a category, you can pick either No Parent or a parent category. The difference here is that with categories you have the option of creating complex category-subcategory structures. Just as with articles, you should pay attention to the metadata fields for categories. Fill in a metadata description and keywords.

> **Tip**
>
> If you are American, you might wonder why Uncategorised is not Uncategorized. This is because the official language of Joomla! is British English, not American English. You can and should change the spelling by editing the category.

After clicking Save & Close, you will be returned to the Category Manager. Now create some new categories. You can use filler content or create categories that make sense for your site. In our case we created three categories: News, Blog Posts, and Press Releases. In this case, Blog Posts and Press Releases have News as their parent category. Figure 5.8 shows an example of how your Category Manager should look if you have created these categories. Notice how the child categories are visually displayed in relation to the parent category. Altogether people sometimes refer to this structure as the category tree and each set of categories and subcategories as a branch.

If you would like to, now would be a good time to write some new articles in these categories.

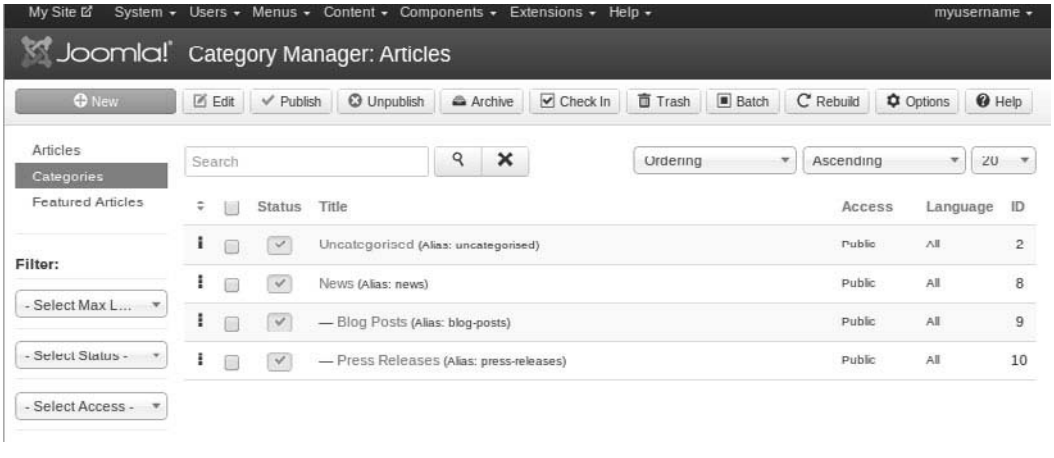


Figure 5.8 Category Manager after adding new categories

Menus and Menu Items

If you have been following along step by step, you have now created several articles and categories. However, if you look at the front end of your site, it does not look any different. That is because we have not done anything to display the pages. There are a lot of ways to display content in Joomla!, but the most important is through the use of menus and menu items. You currently have one menu on the front end of your site, and it displays one menu item, a link to the home page, which, as of now, is blank. What we will do next is change the home page by changing the Home menu item.

Menu Manager

You can access the Menu Manager by navigating to Menus in the top menu of the Control Panel and clicking Menu Manager. The Menu Manager will show the existing menus. The table columns show data associated with each menu:

- *Title*: This is the name of the menu. You can reach an item on a menu by clicking its title.
- *Menu Type*: This is the unique name of the menu. Each menu must have a unique name. Although the name is linked for editing, there are almost no circumstances in which you should edit it; doing so can have serious consequences.
- *Published*: This is the number of published individual menu items. Menu items have states just as articles and categories do.
- *Unpublished*: This is the number of unpublished individual menu items.
- *Trashed*: This is the number of individual menu items that have been deleted but not yet removed from the menu trash.
- *Modules*: This is the number of modules with which a specific menu is associated. Menus are displayed on a site using modules. Sometimes you will want to display the same menu in several different modules.
- *ID*: This is a unique number that is assigned to each menu.

> **Tip**
>
> Do not delete the main menu or the menu that contains your default or Home menu item. This will cause the front end of your site to show a 404 error message, meaning the page is not found (this pretty much means all pages will not be found without a Home menu item to reference to). To remedy this, if you have deleted the main menu or default Home menu item, simply create a new menu item and assign it as the default menu item, or use an existing menu item and assign it as the default menu item.

Menu Items

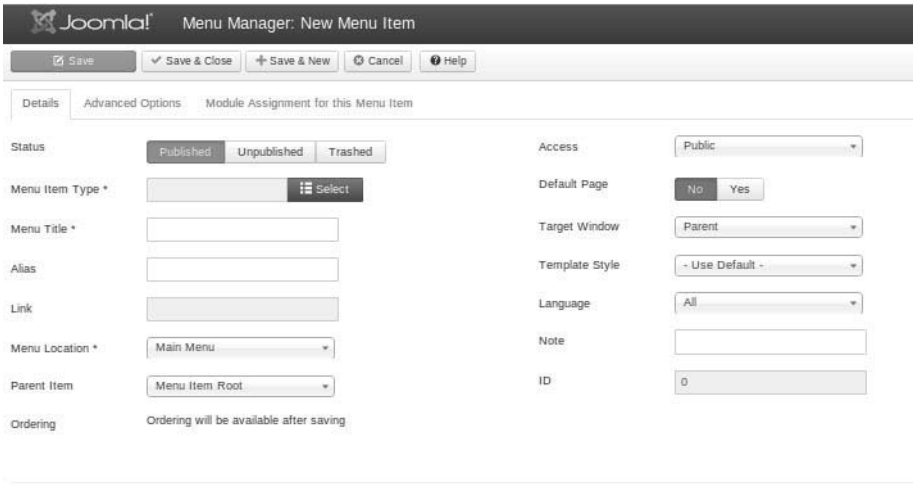
To access the menu items for a menu, you can click the menu name, click on the Menu Items link in the submenu, or navigate to it by using the top menu and going to Menus and then selecting the menu you want to edit from the list of existing menus.

Once you have gone to the Menu Item Manager screen for that selected menu, you will see a list of existing menu items, if any. You will also see a toolbar with a very similar set of options to those for editing an article. For example, you can click New to create a new item, or select an item and click Edit to change it. You can also change the state of menu items. There is batch processing to handle move, copy, change access level, and change language. Two additional buttons are Home and Rebuild. Rebuild should be clicked only if you have made extensive changes to the menu structure. Home allows you to set the home page for your site. This is the page that people will see when they visit *yourdomain.com* without any additions to the end of the URL. You must always have a home page for your Joomla! site to work.

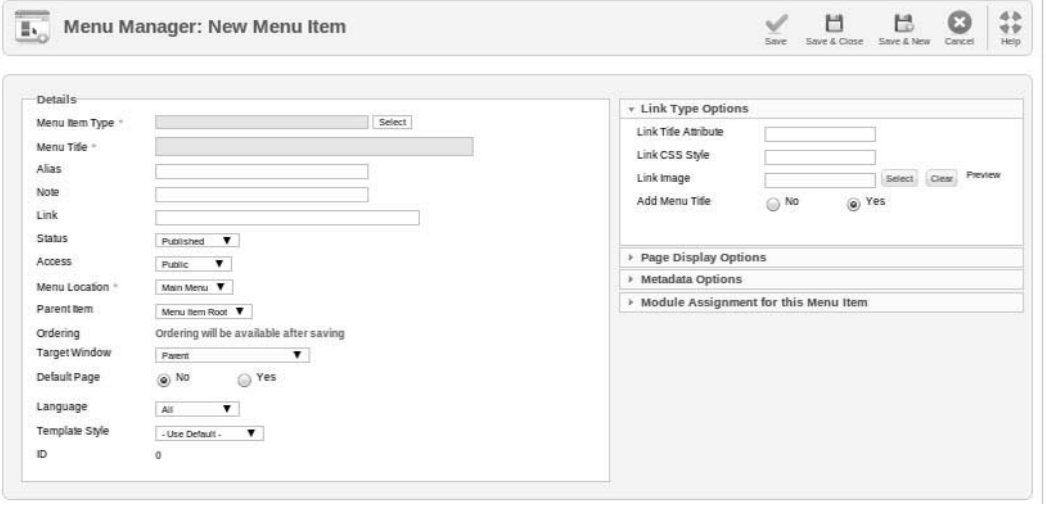
In the Menu Item Manager, click New. The screen will look as in Figure 5.9.

The first step in creating a menu item is to select a type. To do this, click the Select button. This will give you a list of types. In Joomla! 3 the initial list gives general headings that should be clicked to see specific listings. In Joomla! 2.5 the entire list is shown without the need to click.

- *Contacts*: This allows you to create links to a single contact, a category of contacts, featured contacts, or a list of all contact categories. Contacts are created and managed using the Contact component located in the Components menu.
- *Articles*: This allows you to create links to individual articles or to articles grouped by category, a group of featured articles, and a list of article categories. If you select a group type of category, you can choose a Blog layout showing the introductory text of the articles of the group, or a List layout, which will show the titles and article information in a tabular list.
- *Smart Search:* This allows you to make links to Smart Search. There are many variations of menu links within the Smart Search type.
- *News Feeds*: This allows you to create a menu link to any news feeds you have configured using the News Feed Manager located in the Components menu to a list of news feeds in a category, or to a list of all news feed categories.
- *Search*: This allows you to create a menu link to a detailed search page.



A



B

Figure 5.9 Menu item creation screen in (A) Joomla! 3 and (B) Joomla! 2.5

- *User*: This allows you to create a menu link to items related to users on your site such as login, registration, reminder for lost passwords and usernames, user profile (which displays a profile), and edit user profile (which allows users to edit their profiles).

- *Web Links*: This allows you to create a menu link to a category of Web links you have created using the Web Links component located in the Components menu and to a list of all Web link categories. You can also create a menu item for a submission form to allow users to submit Web links to your site.
- *Wrapper*: The Wrapper menu item allows you to display an outside page link inside your site using an HTML iframe. Wrapping an external site inside your site can be useful if you want your users to view and be able to navigate another site but still have your site and its navigation available to them.
- *System Links*: These allow you to add an *External Link* (to a location outside your site); a *Menu Item Alias*, which allows you to link to an existing menu item (you should always use this when making a second link to the same content); and *Text Separator*, which creates a menu item type that acts as a spacer between other menu items. You can apply a graphic or text to it.

As you add components and extensions, new menu item types may become available that are specific to those components or extensions. After you have selected a menu item type, you will be directed to the screen that allows you to configure the menu item and edit the menu item parameters. These parameters change from menu type to menu type.

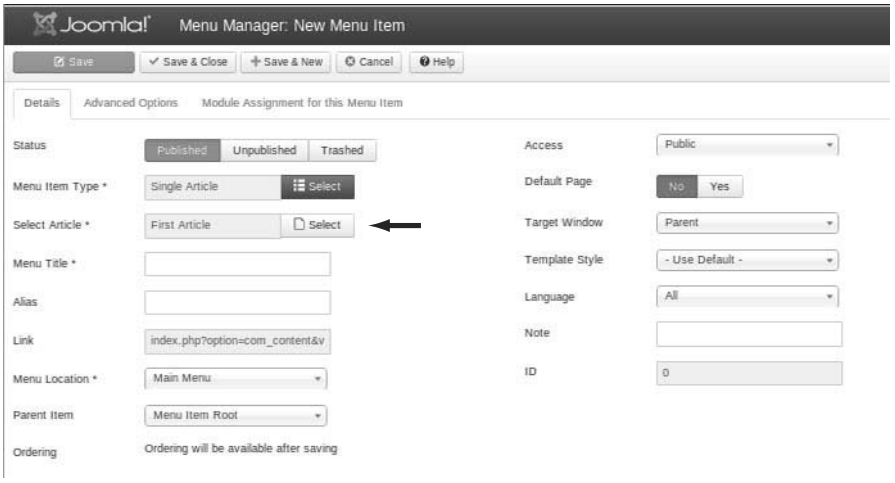
Article Menu Types in More Depth

The most commonly used menu item types for articles are Single Article, Category List, Category Blog, and Featured. In this section we will briefly review these menu item types, giving you a quick rundown on some of the basic parameters that are common to all the menu item types.

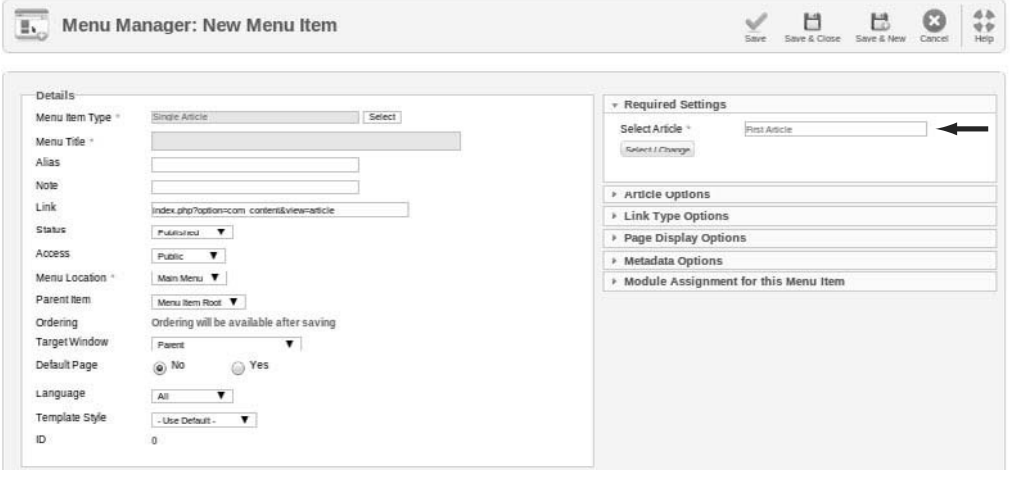
Single Article

We will start by creating a menu item linking to one of the articles created earlier. In this case, select Single Article. Once you have done this, a new field will appear directly beneath the menu type in Joomla! 3 or on the upper-right side of the editing area in Joomla! 2.5 as shown in Figure 5.10. This field will allow you to select a specific article to link. Select an article (such as "First Article") and save the menu item.

Now go to the front end of your site and refresh the page. Your new menu link should now be on the menu beneath the Home link. Click on it and you will see your article as shown in Figure 5.11.



A



B

Figure 5.10 Menu item field for selecting an article in (A) Joomla! 3 and (B) Joomla! 2.5

Category Blog

The Blog layout will allow you to set up a page that has the introductory text from a number of articles in one combined view. The page will include "Read more" links to the full articles. You must select the category you want to display. If we make a Blog menu link to the Uncategorised category and follow the link in the menu, it appears as in Figure 5.12.

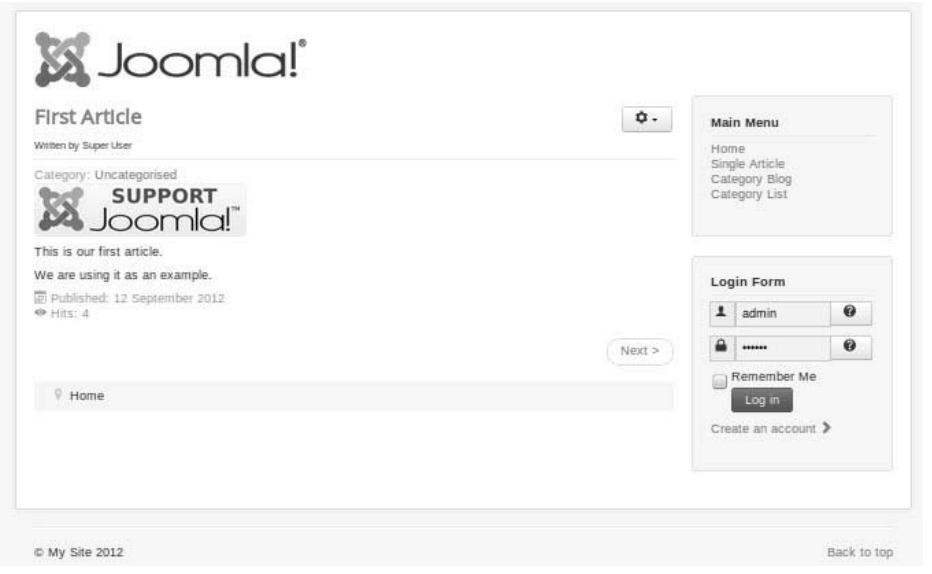


Figure 5.11 Site with a Single Article menu link on the menu, displaying the linked page

Figure 5.12 Category Blog layout

Category List Layout

Category List layouts allow you to show a list of available articles in a category in a table. Figure 5.13 shows a Category List layout as it would appear on the front end of your site.

Featured Layout

The Featured layout is similar to the idea of a front page in a print newspaper. It displays selected articles from a number of different categories in a blog-style layout. To place items in the Featured layout, when editing an article, set the Featured field to Yes. Featured articles are marked with yellow stars when the list of articles is shown, as in Figure 5.14.

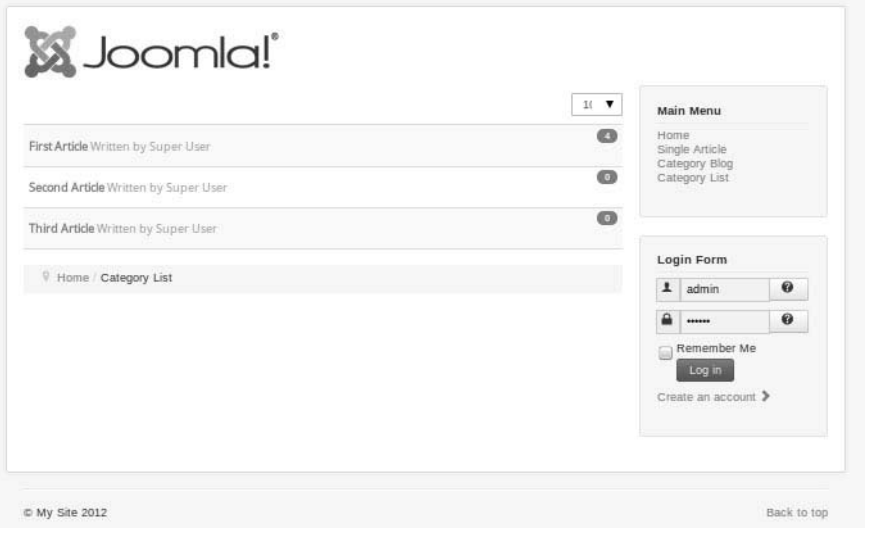


Figure 5.13 Category List layout view on the front end

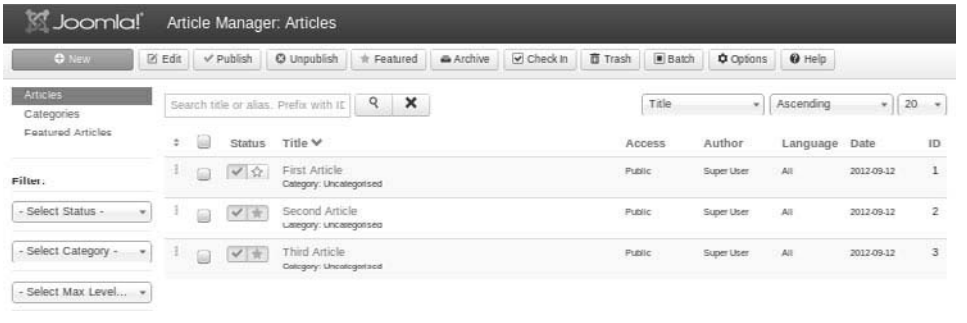


Figure 5.14 Making an article Featured

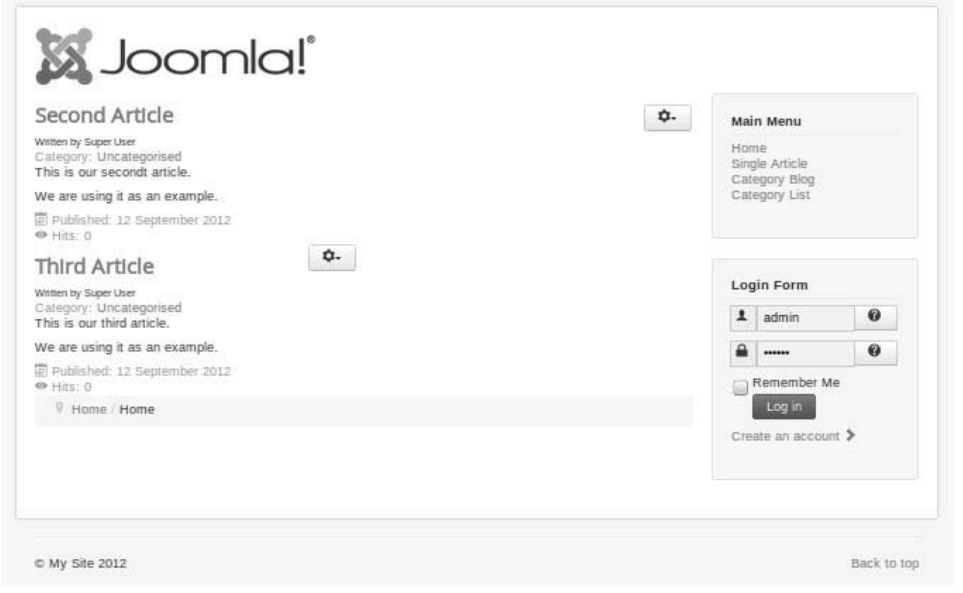


Figure 5.15 The home page now displays the Featured articles.

The Home menu item is already a Featured menu link. Now if you click on the Home menu link, you will see your Featured article or articles as shown in Figure 5.15. (We featured two articles for this example.)

Create Article

This view allows users with appropriate permissions to create a new article from the front end of the Web site. We will examine this in more detail in Chapter 6.

Working with Parameters and Options

Earlier in the chapter and in Chapter 4 we mentioned that there are many options available for displaying your articles. You can see these when you click the Options icon in the Article Manager, when you edit an article, and when you edit a menu item. Most of the time they are the exact same options. Joomla! gives you an incredible array of possibilities for presenting the same content. For example, you can display an article with the author name, creation date, category name, voting, an icon to click to e-mail a link to a friend, and many more. Overall these can be a bit overwhelming, especially since they can be set in three different places. For beginning users we strongly suggest

that you decide on a set of global settings for all of the content components. This will give you a consistent design across your site. Later, when you have developed a more complex site, you will be able to customize the display of individual pages if you wish. However, keep in mind that consistency in design helps to define your site.

Go to the Article Manager and click on the Options button. It will open a screen as shown in Figure 5.16.

There are nine separate tabs on this screen. Most of the tabs correspond to the specific layouts that we reviewed earlier: Articles, the Editing Layout, Category (covering common elements of lists and blogs), Categories, Blog and Featured Layouts, and List Layouts. These are followed by Shared Options, Integration, and Permissions. We'll review each.

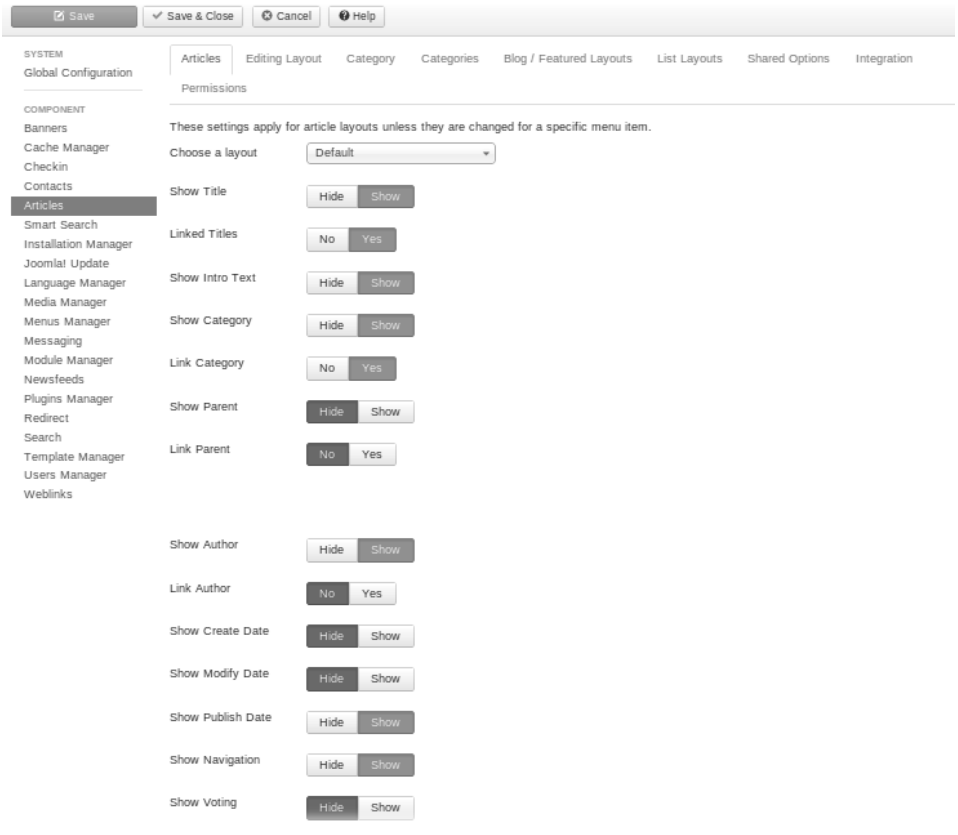


Figure 5.16 The content options first screen in Joomla! 3

Articles

Articles options control the Single Article layout. Note that some of the words used in the labels have changed between Joomla! 2.5 and Joomla! 3.

- *Choose a Layout*: This allows you to choose an alternative way to display an article. Alternatives come from templates. In most cases you should leave this as the default unless you are strongly committed to a different design.
- *Show Title*: Allows you to set whether the article title will show.
- *Linked Titles*: Allows you to choose whether the title is made into a link to the full article.
- *Show Intro Text*: Allows you to choose whether to show the intro text of articles. On some sites intro text (the area above a "Read more" line if you decide to add one) is used as teaser content to encourage people to read the full article. If you are not doing this, you would show the intro text on your full article pages.
- *Show Category*: Allows you to choose whether the title of the category will be shown along with the article.
- *Link Category*: Allows you to choose whether the category name, if shown along with the article, is made into a link to the category. The linked page will show a list of all articles in the category.
- *Show Parent*: Allows you to choose whether the title of the parent category of the category containing this article will be shown along with the article.
- *Link Parent*: Allows you to choose whether the parent category name, if shown along with the article, is made into a link to the list of all of the categories in that parent category.
- *Author Name*: Allows you to choose whether the author name will be shown in the article.
- *Link Author*: Links to the author's contact page if one is available.
- *Show Created Date and Time*: Allows you to choose whether the time and the date the article was created will be shown in the article.
- *Show Modified Date and Time*: Allows you to choose whether the article will show if it has been modified or edited and the time and date that occurred.
- *Show Navigation*: Allows you to choose whether navigation between articles will be shown. This shows links to the previous and next articles for people to use to browse your site.

- *Show Voting*: Allows you to choose whether to show how an article is rated.
- *Show Read More*: Allows you to choose whether a "Read more" link will be shown. Used in combination with showing intro text, it allows site visitors to browse to the full article.
- *Show Title with Read More*: Includes the article title in the "Read more" link. This is important for visually impaired visitors because if all of your links say only "Read more," they cannot be sure which article the link goes to.
- *Read More Limit*: This sets a limit on the number of characters from the title to include with the "Read more" link.
- *Icons*: Allows you to choose whether you want to use icons or text for the PDF, print, and e-mail functions that can be set to show within an article.
- *Print Icon*: Allows you to show or hide the ability for visitors to print the article they are viewing.
- *E-mail Icon*: Allows you to show or hide the ability for visitors to send an e-mail with the article information to an e-mail address.
- *Hits*: Allows you to show or hide the number of times an article has been accessed or read, otherwise known as *hits*.
- *Show Unauthorized Links*: Allows you to choose whether links to content that is set to the permission level of Registered will show or not to people who are not logged in to your site. This will display only the intro text of an article. Typically this is used to encourage site visitors to register at your site in order to get its full content.
- *Positioning of the Links*: Articles have optional fields to include links. These can be found in the same location as the image fields (below the editor in Joomla! 3 and in a slider on the right in Joomla! 2.5). These are typically used for supplemental information (for example, a Help link, a link to product details, or something similar). This option allows you to set the location of these links at the top or bottom of the article.

Editing Layout

This controls the appearance of the editing form.

- *Show Publishing Options*: Changing this will hide the publishing options that are displayed when you edit an article. This can be useful because it prevents users from overriding the settings in the global content configuration.

- *Show Article Options*: Changing this will hide the article options that are displayed when you edit an article. This can be useful because it prevents users from overriding the settings in the global content configuration.
- *Front-End Images and Links Changing*: This will hide the fields for inserting images and URLs. These fields are located directly below the editing area in Joomla! 3 and in the images and links slider in Joomla! 2.5. These links provide a standardized way to insert images into the intro text and main text of your article and similarly insert up to three URLs. Using these rather than inserting the images and links by hand allows you to create a consistent layout across your articles, especially if multiple people are creating articles.
- *URL Target Window A, B, and C*: These three fields allow you to decide whether the links open in the same browser window, open in a new browser window, or open in a pop-up window (smaller than the normal new window and with no browser controls) or in a modal pop-up (a pop-up centered in a gray screen).

Category

This controls Category layouts.

- *Choose a Layout*: This lets you pick either the List or Blog layout as the default for category layouts.
- *Category Title*: Show or hide the category title.
- *Category Description*: Show or hide the category description if you created one.
- *Category Image*: Show or hide the category image if you added an image using the Image field. This will not impact an image inserted with the editor.

Categories

The Categories layout shows all or part of the category tree. This makes it useful for displaying sites with hierarchically organized data but can also be used to create a site map or table of contents for your site as a whole.

- *Top-Level Category Description*: Allows you to show or hide the description of the top-level or root category of your display.
- *Subcategory Levels*: Allows you to specify how many levels deep the display should go. Obviously there are limits to the number of levels you can effectively display on one page.

- *Empty Categories*: Lets you decide whether to display all categories or only those that include articles.
- *Subcategories Descriptions*: Lets you display or hide the description you have created for each category in the tree.
- *# Articles in Category*: Lets you display or hide the article count for each category.

Blog/Featured Layouts

Blog and Featured layouts display a number of articles together using the intro text (or the full text if no intro text is available).

- *# Leading Articles*: Leading articles are at the top of the display and are the full width. This number sets the number of articles that will display as leading.
- *# Intro Articles*: Intro articles display in columns below any leading article. This number sets the number of articles that will display as intros.
- *# Columns*: Sets the number of columns in which articles will be displayed. Usually you will want to make sure that the number of intro articles is a multiple of the number of columns (so if you have three columns, you might have three, six, nine, or 12 intro articles).
- *# Links*: Under the intro articles you can display additional links (title only, no text) to more articles. This field sets the number of links.
- *Multicolumn order*: Intro text articles that span several rows can be displayed sequentially either down one column and then down the next, or across one row and then across the next. This option lets you specify which of these you want to use.

List Layouts

List layouts display your articles from a single category in a list format. This list can contain a number of columns and can be filtered.

- *Display Select*: Displays or hides a drop-down allowing users to select the number of items to display on a page.
- *Filter*: Allows you to specify one field (such as title or author) on which users can filter the article list.
- *Table Headings*: Lets you show or hide the heading for each column in the list
- *Show Date*: Shows or hides the article's publication date.

- *Date Format*: Allows you to specify a date format such as Month Day Year or Day Month Year.
- *Show Hits*: Allows you to show or hide the number of times an article has been viewed.
- *Show Author*: Allows you to show or hide the name of the author of the article.

Shared Options

There are some options that are used in many different layouts.

- *Category Order*: When you are displaying several categories together, this option will allow you to specify the ordering of the categories. Options include alphabetical and reverse alphabetical by title, by date, or by order in the Category Manager.
- *Article Order*: The display of articles can be ordered by author, date, title, number of hits, or the ordering in the Article Manager. Most of these options include the ability to sort normally or in reverse order.
- *Pagination*: Controls whether the Previous or Next links are displayed at the bottom of a page. This is commonly used when there are more articles than can display on one page.
- *Pagination Results*: Adds the total number of pages to the display of pagination.

Integration

Integration options allow you to integrate your content with other sites and with other features.

- *Show Feed Link*: Joomla! can automatically create an RSS feed for your multi-article views (lists, blogs, and featured). This option lets you control the display of the feed link.
- *For Each Feed Item, Show*: Allows you to set whether the full article text or just the intro text will show if you have turned on RSS feeds of your articles.
- *Show Read More*: Allows you to include a "Read more" link in your feed.

Permissions

Permissions control what actions which groups of users can take concerning articles and categories in the Content component. These work exactly like the

global permissions discussed earlier. The only difference is that they apply only to articles, not to all of your site.

If you have changed any of the selections from the default selections of your install in the article parameters, remember to click Save at the top of the Article Parameter box that opened when you clicked Article Parameters. We encourage you to try different options and find the settings that make sense for your site.

The advanced parameters that you see when editing articles are the same list as the global parameters for articles. You can adjust these on an article-by-article basis. You will also see many of these repeated when you create an Article menu item. Overall the many parameters that Joomla! offers you allow you to customize the layout of your site in great detail. Try not to be intimidated by the large number of options. Once you learn your way around them, they will not seem so complex.

> **Tip**
>
> One thing to note is that the advanced parameters allow you to set at the menu level the article parameters discussed in the previous section. If these menu item parameters are different from the global settings, the menu item parameters will take precedence. Global article parameters are site-wide and can be altered on an article-by-article basis. If altered, the individual article parameters will take precedence. If the menu item type has alterations to the individual or global article parameters, the menu item type parameters will be the parameters that will be enforced.

Conclusion

The basic techniques described in this chapter of how to work with menu items, how to work with content, and how to organize and structure your content using categories are just a starting point. The Joomla! forum and the documentation sites provide a wealth of in-depth resources that can give you insight into how to plan your content structure, as well as assist with any stumbling blocks you may encounter. Chapter 6 will discuss extensions, components, modules, plugins, and languages, with information on installing them and recommendations for some of the best Joomla! extensions available. Chapter 7 will demonstrate how to work with one of the default templates, how to modify the color scheme, and how to customize the images to suit your needs.

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