



Joomla!® 3

<explained>

Your Step-by-Step Guide

Stephen Burge



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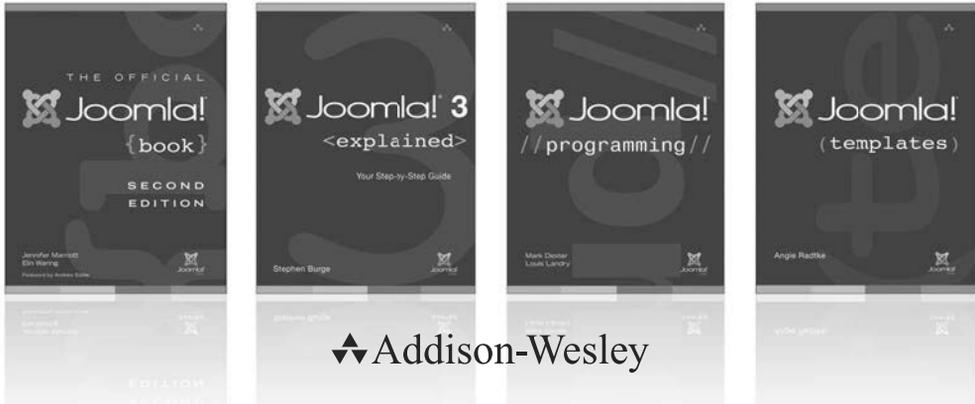
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Joomla!® 3 Explained

Your Step-by-Step Guide

Second Edition

Stephen Burge

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*This book is dedicated to my grandfather, Leslie,
who is short on words and long on love.*

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Preface

This book series was written for my Dad and for people like you.

I teach Joomla classes all across the United States and talk with people like you who have tried to learn Joomla and other software.

They order books, watch videos, read online documentation, and attend classes. Many are frustrated and say the same thing: “Geeks create this training, and geeks don’t speak our language.”

So, when I was asked to write this book, I wanted to write it in plain English. I wanted to write books that my Dad could read, understand, and enjoy.

My Dad was a teacher and took up building websites only after retiring. Maybe you’re in a similar situation and Joomla is a hobby for you.

Maybe you went to work one day and your boss said, “Surprise! You’re learning Joomla!”

Maybe you’re a web professional who’s looking to make a career from building Joomla sites.

It doesn’t matter. We all want to spend more time building websites and less time struggling with complicated instructions. After all, the whole point of using Joomla is to allow you to take control of your site quickly and easily.

This book worked for my Dad. He read the manuscript and has now built several sites.

I hope this book works for you, also, and that you can create Joomla websites that make you proud.

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Acknowledgments

This book stands on the shoulders of the entire Joomla community.

Every month, millions of people visit Joomla.org. Every one of those visitors plays his or her role in helping Joomla grow, from those who drop in once to those who volunteer many hours every week. I'm grateful to you all.

On a practical level, this book was written thanks to the patience and support of Debra Williams Cauley and Songlin Qiu. Thanks also to my Dad, my wife, my colleagues, Cindy Montano, and all those who gave feedback.

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About the Author

Stephen Burge is from Portsmouth in southern England and now lives in the U.S. city of Atlanta, Georgia.

Between leaving England and arriving in the United States, there were a few stops, including Wales, Mexico, Japan, and Australia. Steve paid for his travels by working as a teacher and a web designer.

Steve now combines teaching and web design by running OStraining.com, which teaches people how to build websites. OStraining clients include Apple, Pfizer, and the U.S. Departments of Energy, Education, and Commerce.

Steve has previously published two books: *Joomla!™ Explained* (Addison-Wesley, 2012) and *Drupal™ 7 Explained* (Prentice Hall, 2013). Both are the best-selling books for the software they cover.

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Joomla! Content Explained

This chapter explains the easiest and fastest way to add content to a Joomla site. If you follow this workflow, it will make your Joomla life very easy.

The workflow for adding Joomla content is simple:

Step 1. **Categorize.** Create organization for your articles.

Step 2. **Add.** Write your articles.

Step 3. **Show.** Create menu links so that people can click through and see your articles.

I like to call this the *CASh* workflow. *CASh* is short for “Categorize, Add, Show.” It does take a little bit of practice to follow the workflow correctly. Once you run through the workflow a few times, though, it should become easy to add content to your Joomla site.

Things you can do after reading this chapter include

- Organize your Joomla content into categories
- Add new content to Joomla
- Show your content in various ways, including a full page, a blog with multiple articles, or a long list of articles

Step 1: Categorize

The first step in the Joomla content workflow is to categorize your content. We need to make sure that our information can be usefully organized.

Let’s think about the JoomlaVille project we started in the previous chapters. What do we need to include on the website for our visitors? To plan our site’s organization, grab a piece of paper and a pen and brainstorm some ideas.

Go ahead and write down all the articles you want on your site. For this small site, your list might look like this one:

- Climate
- Location
- History
- Museum
- Zoo
- Aquarium
- Trains
- Buses
- Airport

Now that we know what information we want to have on our site, let's organize it.

Joomla uses categories to organize articles. Let's create one category for each group of related articles and name it appropriately, as shown in Figure 5.1.

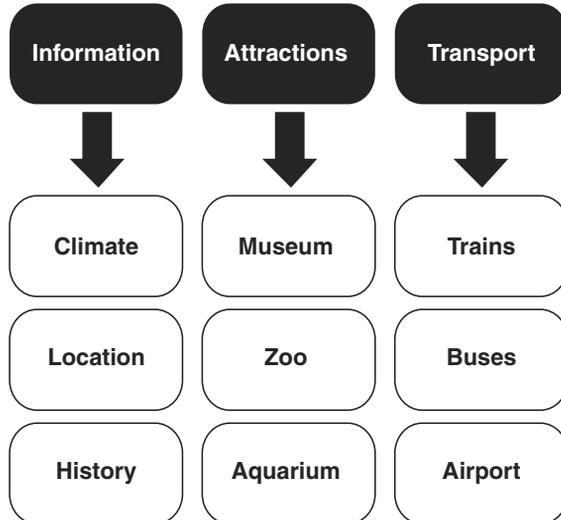


Figure 5.1 The categories and articles for our first Joomla site

Information

- Climate
- Location
- History

Attractions

- Museum
- Zoo
- Aquarium

Transport

- Trains
- Buses
- Airport

Things can get much more advanced, but this is a nice straightforward example to get us started.

Now that we have our plan, we're ready to start implementing that plan in Joomla. We will use the CASH workflow to create the first category called About and the three articles inside it called "Climate," "Location," and "History." Here's the process we'll use:

Step 1. **Categorize.** Create the Information category.

Step 2. **Add.** Write the three articles.

Step 3. **Show.** Create menu links so that people can click through and see those articles.

Ready? Let’s get started and use Joomla’s CASH workflow for the first time:

1. Go to the administrator area and then click Category Manager under the Content drop-down menu. You’ll see a page like the one in Figure 5.2. Notice that Uncategorized and News are already options. The Uncategorized category is used for articles that don’t fit neatly inside any other category. It’s most commonly used for small sites with only five or six articles. With so few articles, you wouldn’t really need to divide them into categories. However, we’ll eventually have at least a dozen articles, so we need to create more categories.

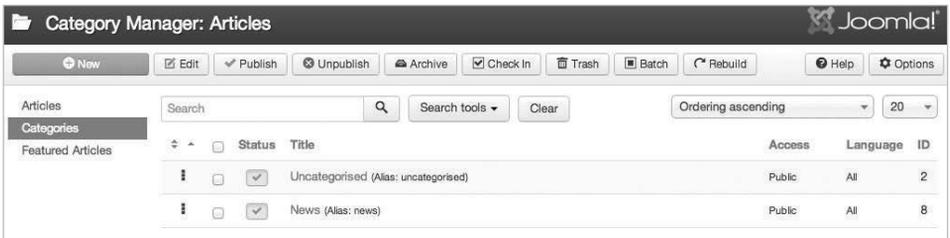


Figure 5.2 The Category Manager

2. Click the green “New” button.
3. To get started, we need to fill in just one field: Title. The text in this field should simply be *Information*. However, to help our visitors, it might be worth entering a short description, explaining what’s in this part of the site. For example, you could say, “This category contains information about Joomla!ville.”

Your screen should look like Figure 5.3.

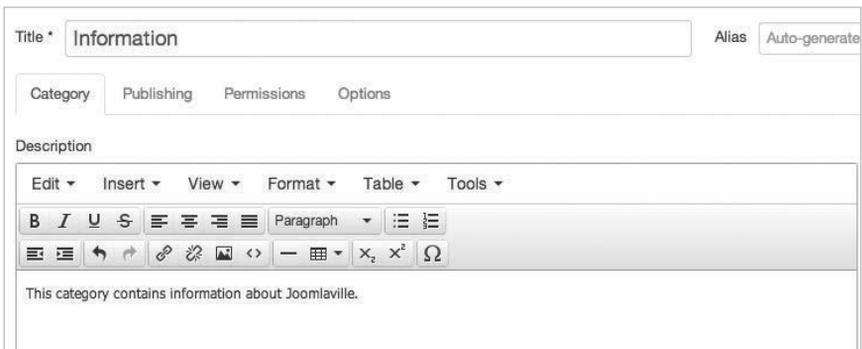


Figure 5.3 Creating a new category

- Click Save & Close. You should see that your category has been added, as in Figure 5.4. You'll see a message that says, "Category successfully saved."

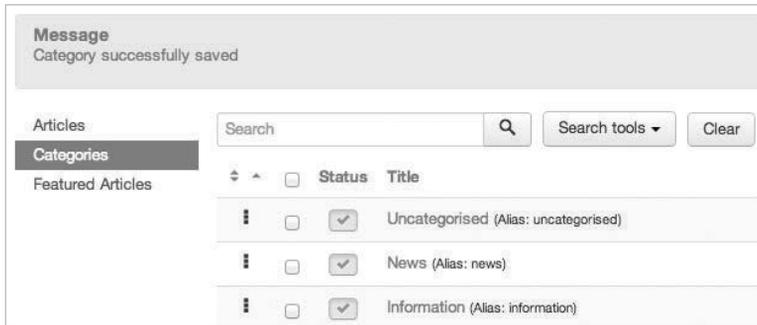


Figure 5.4 The updated Category Manager

Now that we have a category in which to organize our articles, let's write those articles.

Step 2: Add

To start writing, click Article Manager under the Content drop-down menu. You should be looking at a page like the one in Figure 5.5.

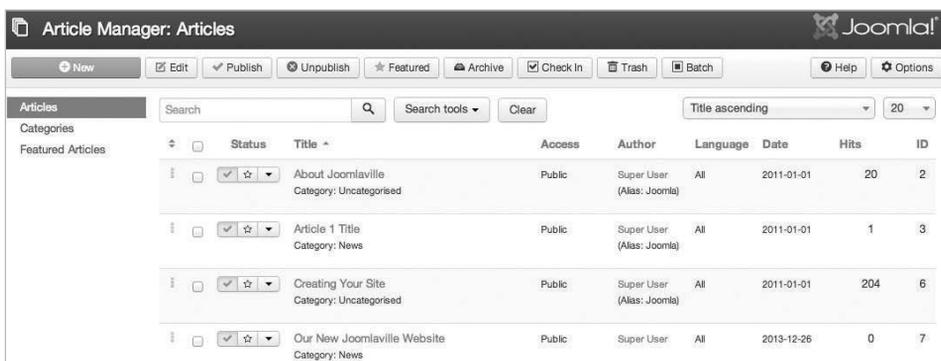


Figure 5.5 Your Article Manager

Click the “New” button next. There are only three fields (as indicated in Figure 5.6) you must fill in:

1. Title
2. Content
3. Category

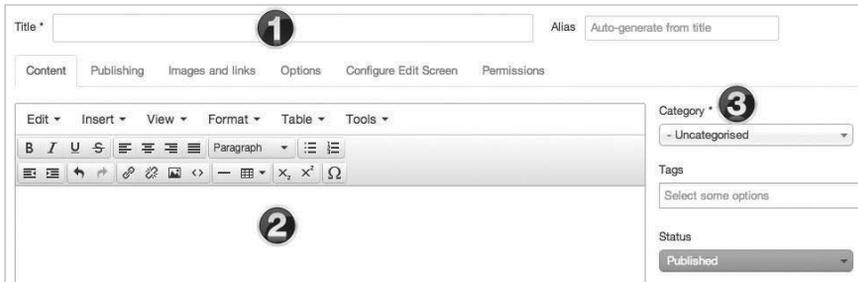


Figure 5.6 The Title, Content, and Category fields

Let’s fill in those three fields from top to bottom:

1. **Title.** Enter *Climate* to match the first article in our plan (see Figure 5.7). When you save the article, the Title is automatically copied into the Alias field. This Alias field forms part of the URL, so our “Climate” article will have a URL that contains the word “climate.” You can find out more about how Joomla creates URLs in Chapter 14, Joomla! Site Management Explained.

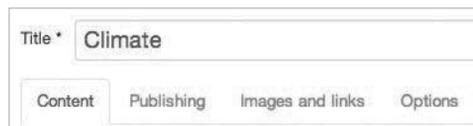


Figure 5.7 Entering a title for the article

2. Place this article into the correct category. Click the Category drop-down menu and choose the Information category, as in Figure 5.8.

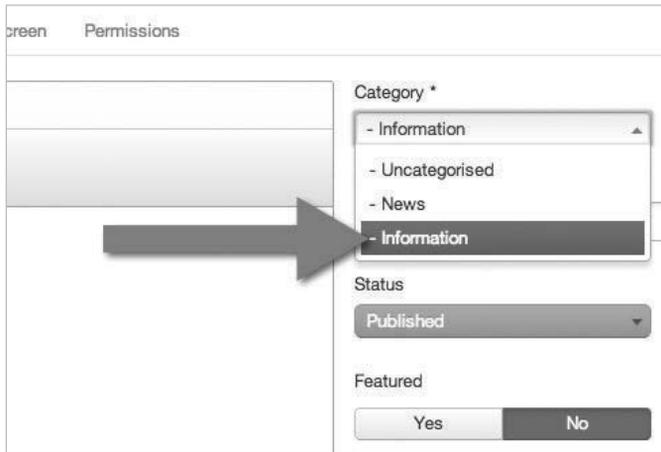


Figure 5.8 Choosing a category for the article

3. Write the article, as in Figure 5.9. You can find some sample text at www.joomla3explained.com/chapter5 that you can use for this article.

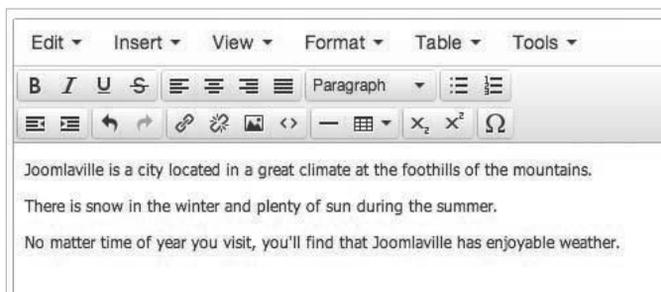


Figure 5.9 Writing the "Climate" article

4. Click Save & Close and your “Climate” article will be complete. The final article should look like Figure 5.10.

The screenshot shows the Joomla! article editor interface. At the top, the 'Title' field contains 'Climate' and the 'Alias' field contains 'climate'. Below the title fields are tabs for 'Content', 'Publishing', 'Images and links', 'Options', 'Configure Edit Screen', and 'Permissions'. The 'Content' tab is active, showing a rich text editor with a toolbar containing bold, italic, underline, strikethrough, bulleted list, numbered list, indent, outdent, link, unlink, undo, redo, source code, and help icons. The editor area contains three paragraphs of text: 'Joomlaville is a city located in a great climate at the foothills of the mountains.', 'There is snow in the winter and plenty of sun during the summer.', and 'No matter time of year you visit, you'll find that Joomlaville has enjoyable weather.' On the right side, there are three sections: 'Category *' with a dropdown menu set to '- Information', 'Tags' with a text input field containing 'Select some options', and 'Status' with a dropdown menu set to 'Published'.

Figure 5.10 The finished “Climate” article

Now we’ll repeat this process to create a second article. Here are the details for our second article in the About category:

1. Title: Location
2. Category: Information
3. Article Text: Describe where the city is. There is some sample text at www.joomla3explained.com/chapter5 to help you out.

When you’ve filled in those three fields, your article should look like the one in Figure 5.11.

The screenshot shows the Joomla! article editor interface for a new article. The 'Title' field contains 'Location' and the 'Alias' field contains 'Auto-generate from title'. Below the title fields are tabs for 'Content', 'Publishing', 'Images and links', 'Options', 'Configure Edit Screen', and 'Permissions'. The 'Content' tab is active, showing a rich text editor with a toolbar containing bold, italic, underline, strikethrough, bulleted list, numbered list, indent, outdent, link, unlink, undo, redo, source code, and help icons. The editor area contains three paragraphs of text: 'Joomlaville is in the southeast of our country, about a five hour drive from the capital.', 'It is located near a large mountain range, so there is plenty of opportunity for Joomlaville people to enjoy skiing, kayaking and other outdoor activities.', and 'Joomlaville is also about three hours from the beach, so it's easy for residents to enjoy a sunny vacation.' On the right side, there are three sections: 'Category *' with a dropdown menu set to '- Information', 'Tags' with a text input field containing 'Select some options', and 'Status' with a dropdown menu set to 'Published'.

Figure 5.11 Writing the “Location” article

4. Click Save & Close to finish creating this article.

Let's do that one more time to finish our Information category by creating the third article. Here are the details we use:

1. Title: History
2. Category: Information
3. Article Text: As before, there is some sample text at www.joomla3explained.com/chapter5 to help you out.

Your “History” article should look like Figure 5.12.

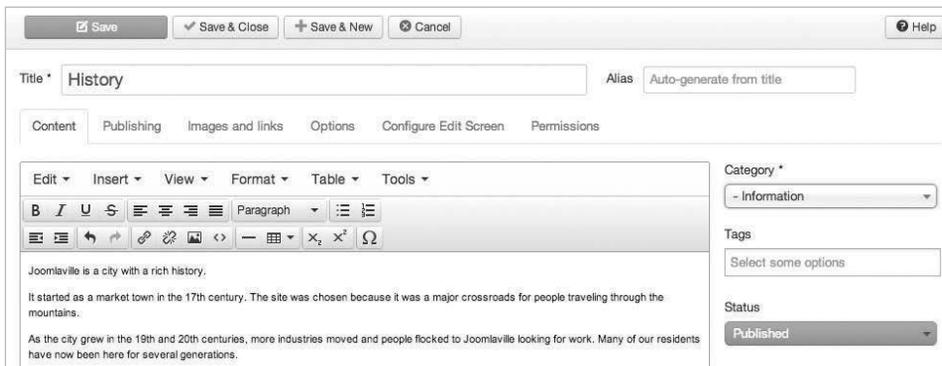


Figure 5.12 Writing the “History” article

4. Click Save & Close to finish creating this article.

Wonderful! We now have one new category on our site called About, and it contains three new articles: Joomlerville Overview, Joomlerville Location, and Joomlerville History.

There's only one thing left to do.

5. Visit the front of your site. Have a look at your site and Figure 5.13. What's missing?

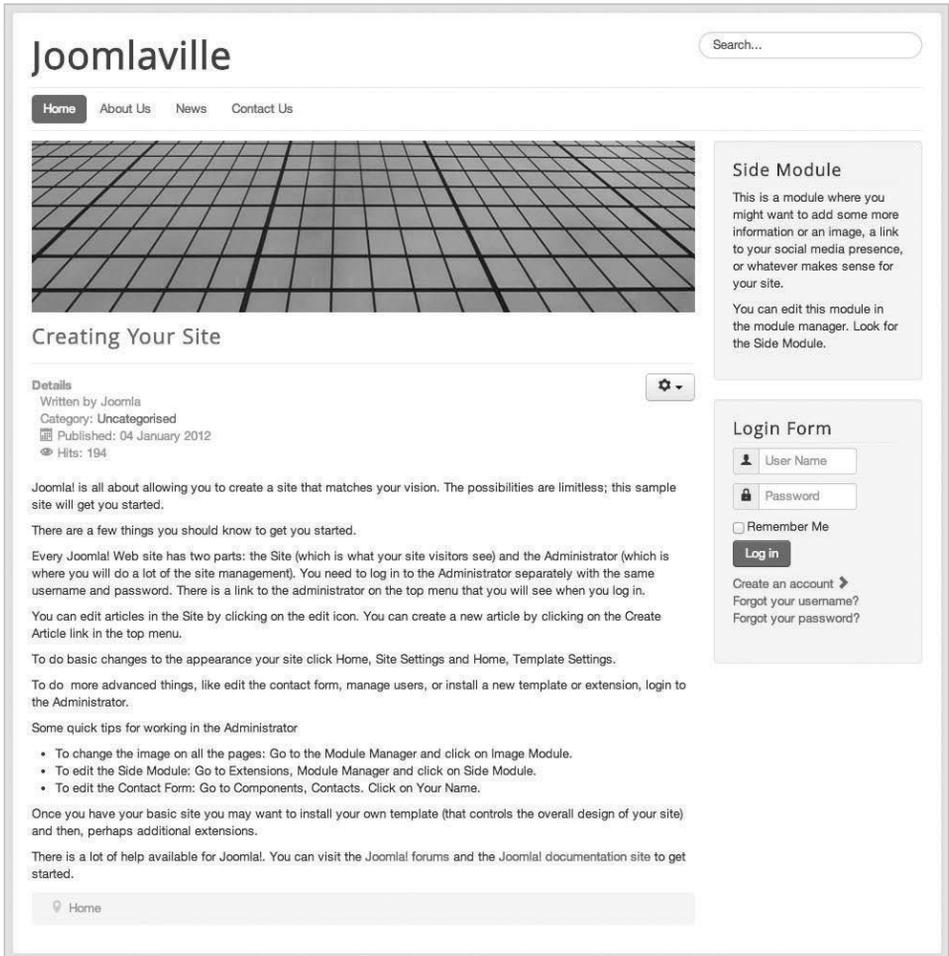


Figure 5.13 The visitor area of your Joomla site

You can't see your new articles anywhere!

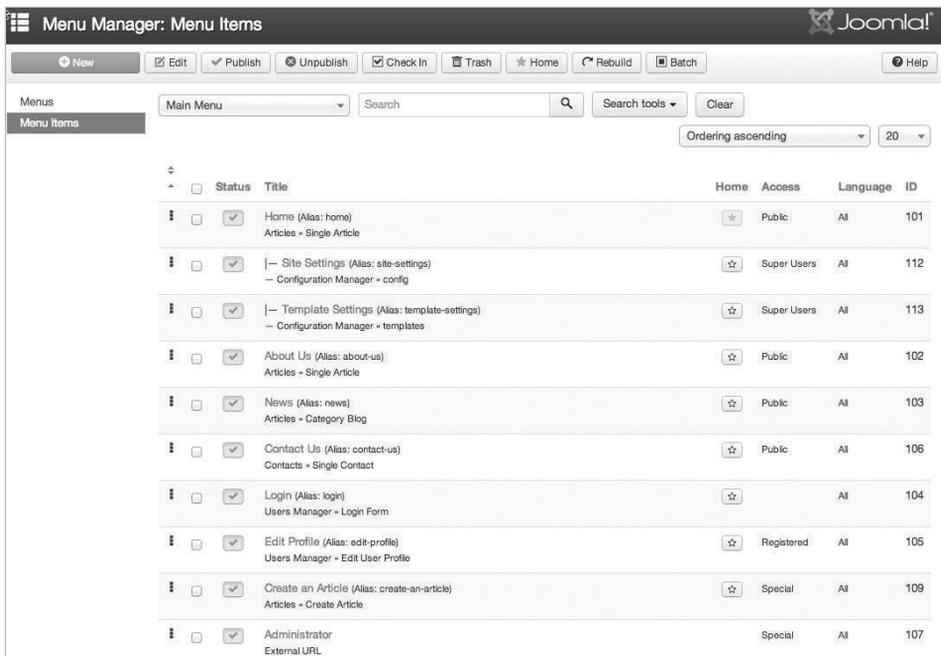
We need some way for visitors to see our articles. We could place all of the articles on the front page, but that would lead to chaos once we have 100 articles or more. Our solution will be to make new menu links so visitors can see our articles.

We've done two steps of our Joomla workflow: Categorize and Add. The third and final step is Show.

Step 3: Show

We need to show people our articles. We do that by making menu links to the articles.

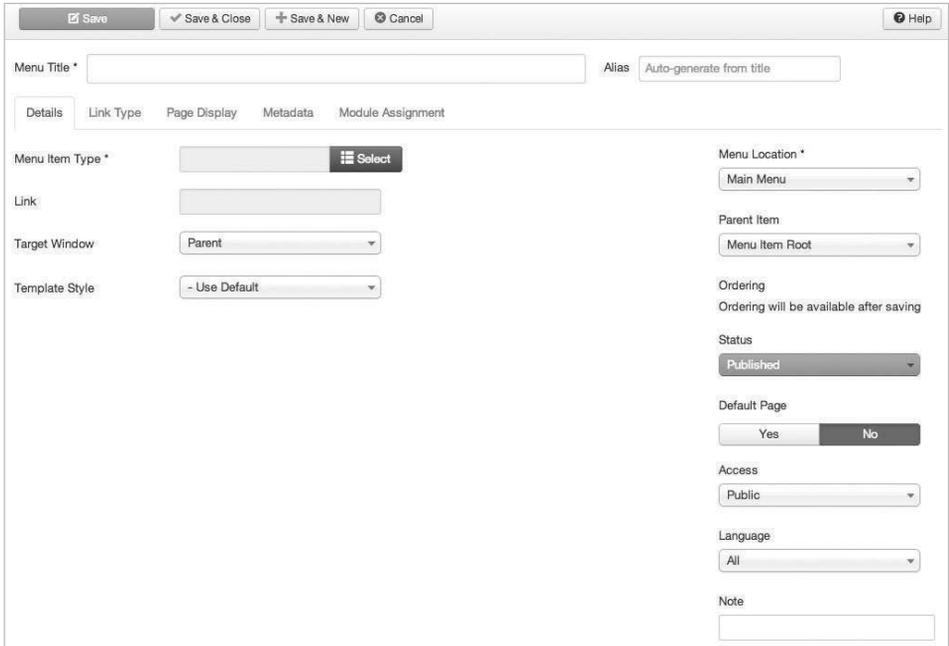
1. In the administrator drop-down menu, click Menus and then Main Menu. You will see a screen like Figure 5.14.



Status	Title	Home	Access	Language	ID
<input checked="" type="checkbox"/>	Home (Alias: home) Articles - Single Article	<input checked="" type="checkbox"/>	Public	All	101
<input checked="" type="checkbox"/>	Site Settings (Alias: site-settings) Configuration Manager - config	<input checked="" type="checkbox"/>	Super Users	All	112
<input checked="" type="checkbox"/>	Template Settings (Alias: template-settings) Configuration Manager - templates	<input checked="" type="checkbox"/>	Super Users	All	113
<input checked="" type="checkbox"/>	About Us (Alias: about-us) Articles - Single Article	<input checked="" type="checkbox"/>	Public	All	102
<input checked="" type="checkbox"/>	News (Alias: news) Articles - Category Blog	<input checked="" type="checkbox"/>	Public	All	103
<input checked="" type="checkbox"/>	Contact Us (Alias: contact-us) Contacts - Single Contact	<input checked="" type="checkbox"/>	Public	All	106
<input checked="" type="checkbox"/>	Login (Alias: login) Users Manager - Login Form	<input checked="" type="checkbox"/>		All	104
<input checked="" type="checkbox"/>	Edit Profile (Alias: edit-profile) Users Manager - Edit User Profile	<input checked="" type="checkbox"/>	Registered	All	105
<input checked="" type="checkbox"/>	Create an Article (Alias: create-an-article) Articles - Create Article	<input checked="" type="checkbox"/>	Special	All	109
<input checked="" type="checkbox"/>	Administrator External URL	<input checked="" type="checkbox"/>	Special	All	107

Figure 5.14 The Main Menu of your Joomla site

2. Let's add a new link to the Information articles we created earlier. Click the "New" button in the upper-left corner. You'll see a screen like Figure 5.15. Whenever you create a menu link to any part of your site, you'll always see this same screen.



The screenshot shows the Joomla! menu creation interface. At the top, there are four buttons: "Save", "Save & Close", "Save & New", and "Cancel". A "Help" icon is in the top right corner. Below the buttons is a "Menu Title" input field and an "Alias" dropdown menu set to "Auto-generate from title".

The main content area is divided into several sections:

- Details:** This section is active and contains:
 - Menu Item Type *:** A dropdown menu with a "Select" button.
 - Link:** An empty text input field.
 - Target Window:** A dropdown menu set to "Parent".
 - Template Style:** A dropdown menu set to "- Use Default".
- Link Type:** A section with no visible controls.
- Page Display:** A section with no visible controls.
- Metadata:** A section with no visible controls.
- Module Assignment:** A section with no visible controls.

On the right side of the form, there are several additional settings:

- Menu Location *:** A dropdown menu set to "Main Menu".
- Parent Item:** A dropdown menu set to "Menu Item Root".
- Ordering:** A section with the text "Ordering will be available after saving".
- Status:** A dropdown menu set to "Published".
- Default Page:** A section with two buttons: "Yes" and "No", with "No" selected.
- Access:** A dropdown menu set to "Public".
- Language:** A dropdown menu set to "All".
- Note:** An empty text input field.

Figure 5.15 Creating a new Joomla menu link

3. Click the blue “Select” button, as in Figure 5.16. This will allow you to decide which part of the site to link to.

The screenshot shows a Joomla! configuration form for a menu item. At the top is a text input field for 'Menu Title *'. Below it are five tabs: 'Details', 'Link Type', 'Page Display', 'Metadata', and 'Module Assignment'. The 'Link Type' tab is active. Under this tab, there are four rows of fields: 'Menu Item Type *' with a blue 'Select' button and a grey arrow pointing to it; 'Link' with a text input field; 'Target Window' with a dropdown menu showing 'Parent'; and 'Template Style' with a dropdown menu showing '- Use Default'.

Figure 5.16 Choosing which type of menu link to create

4. The pop-up screen presents you with all sorts of different options. Each one allows you to link to a different part of your Joomla site. You could link to a contact form, a search box, a registration form, or many other features. We want to link to one of the articles we created earlier, so click Articles and choose Single Article, as in Figure 5.17.

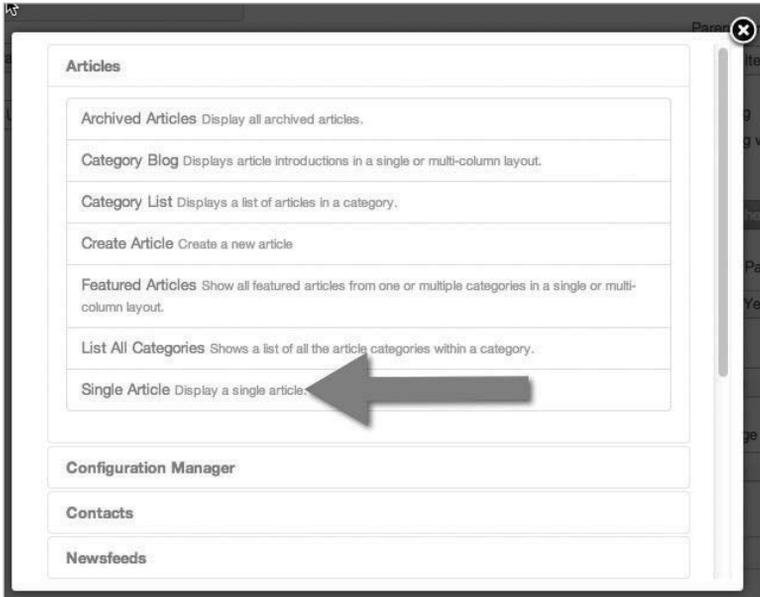


Figure 5.17 Choosing to link to a single article

5. We have just chosen to link to a single article. Now let's choose *which* article. Click the "Select" button, as in Figure 5.18.

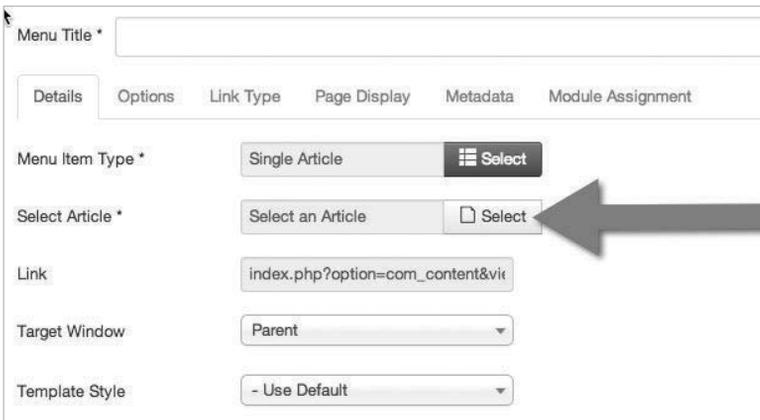


Figure 5.18 Choosing which article to link to

6. You'll see another pop-up box. Click the "Climate" article, as in Figure 5.19.

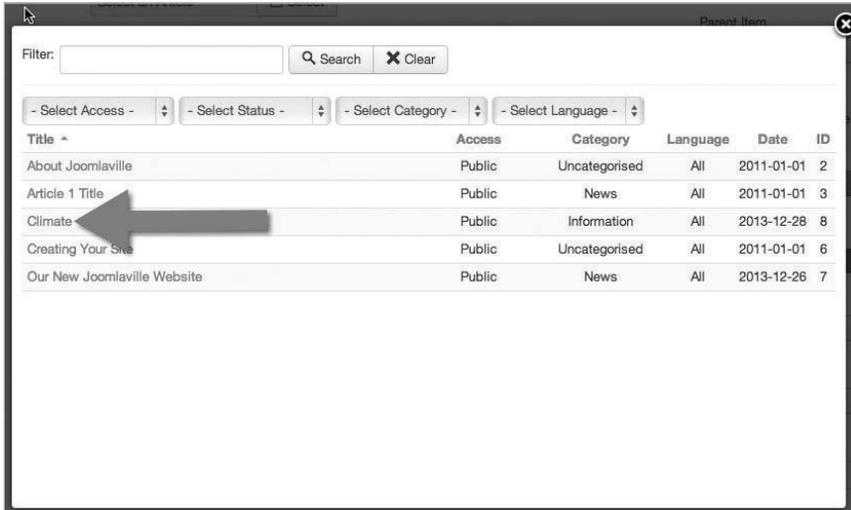


Figure 5.19 Choosing to link to the "Climate" article

7. Enter *Climate* in the Menu Title field. Your screen should look like Figure 5.20.

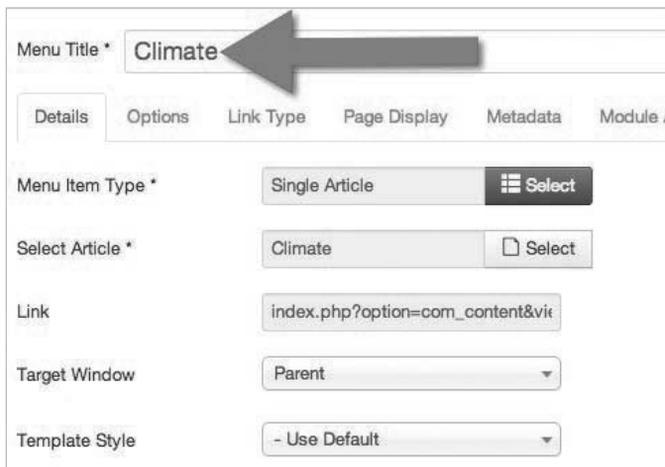


Figure 5.20 Your menu link to the "Climate" article

8. Click Save & Close to complete the creation of your menu link.
9. Visit the front of your site and look for your new Climate link in the Main Menu, as in Figure 5.21.



Figure 5.21 Your new menu link

10. Click the Climate link, and you should see your new article published on your site, as in Figure 5.22.

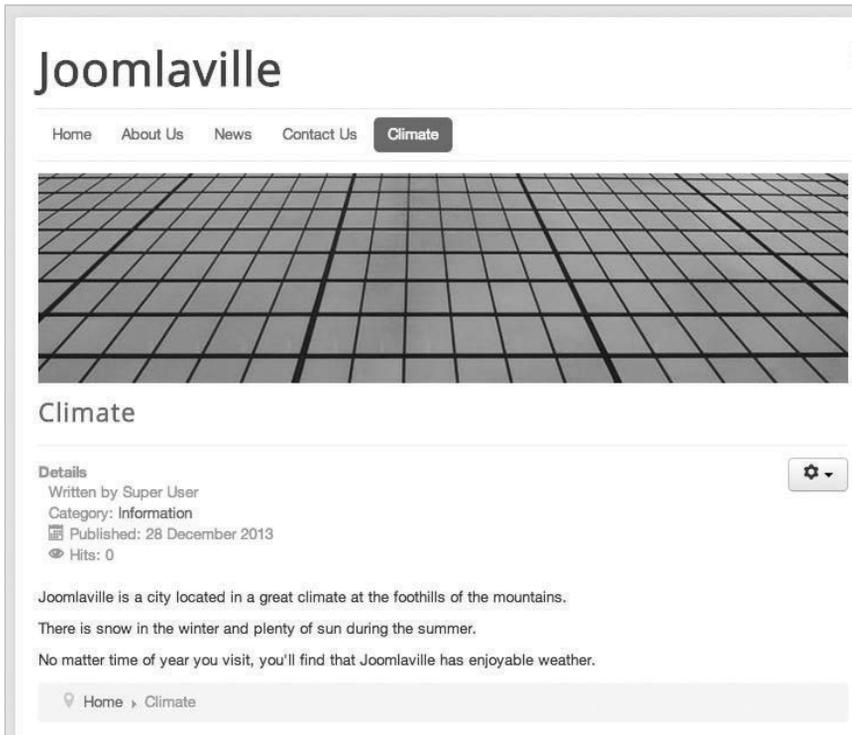


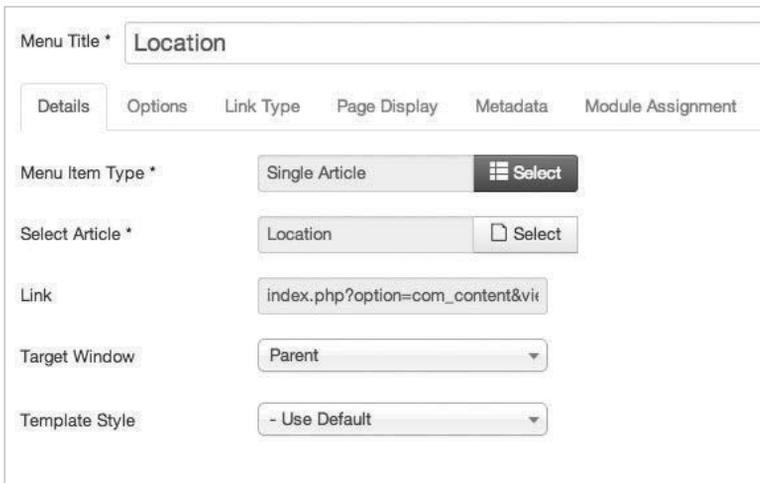
Figure 5.22 Your “Climate” article published on the site

That’s it. You’ve done it! Both you and your visitors can see that new article on your site.

Now that we’ve created a menu link once, let’s go back and create more links while the steps are still fresh in your mind. Let’s link to our “Location” article. Go ahead and follow these steps:

1. Click Main Menu under the Menus drop-down menu.
2. Click the “New” button in the upper-left corner.

3. Click the “Select” button next to Menu Item Type, and you see a pop-up screen.
4. Click Articles and then Single Article.
5. Click the “Select” button next to Select Article, and you see a pop-up screen.
6. Click Location.
7. Enter *Location* in the Menu Title field. Check that your menu link looks like Figure 5.23.



The screenshot shows the Joomla! administrator interface for configuring a menu item. The 'Menu Title' field is set to 'Location'. Below this are several tabs: 'Details', 'Options', 'Link Type', 'Page Display', 'Metadata', and 'Module Assignment'. The 'Details' tab is active. The 'Menu Item Type' is set to 'Single Article' with a 'Select' button. The 'Select Article' field is set to 'Location' with a 'Select' button. The 'Link' field contains the URL 'index.php?option=com_content&view'. The 'Target Window' is set to 'Parent' and the 'Template Style' is set to '- Use Default'.

Figure 5.23 Your menu link to the “Location” article

8. Click Save & Close to complete the creation of your menu link.
9. Visit the front of your site and look for your new Location link on the left in the Main Menu.

- Click the Location link, and you see your new article published on your site, as in Figure 5.24.



Figure 5.24 Your “Location” article published on the site

Congratulations, you’ve done it again! You and your visitors can see two of your new articles on the site.

You've done great so far. Are you feeling brave? I'm going to set you a challenge: See if you can make a menu link to your "History" article. To do so, you follow exactly the same process as we just did for the "Climate" and "Location" articles. Figure 5.25 shows the end result that we're aiming for. If you get stuck, the specific steps you should take to complete this task are at www.joomla3explained.com/chapter5.

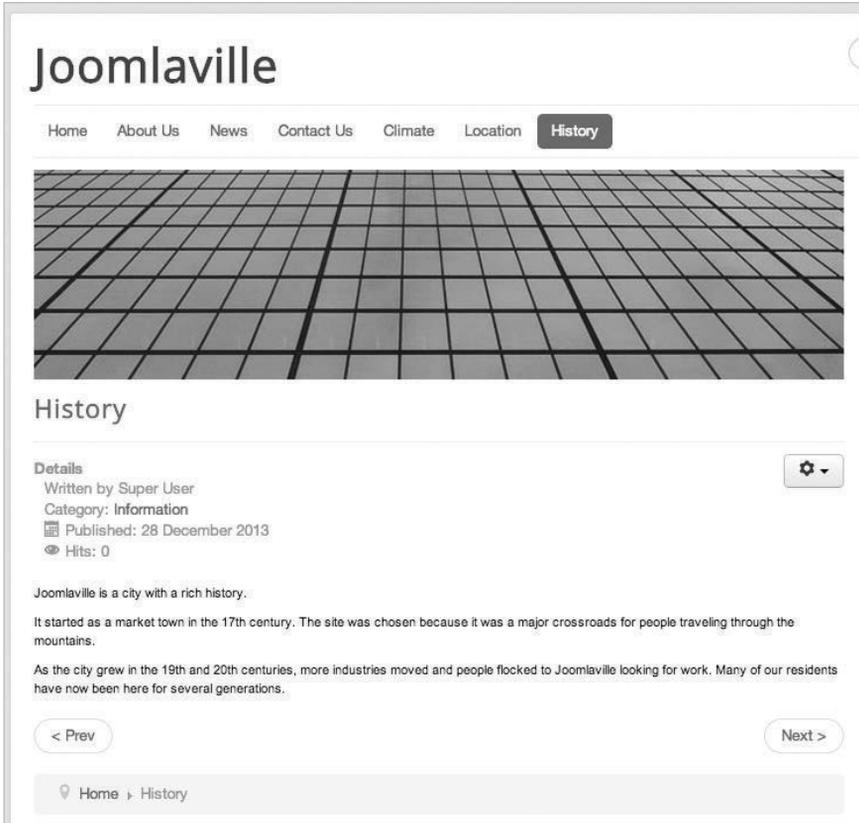


Figure 5.25 Your "History" article published on the site

The Joomla CASH Workflow: Why Do It This Way?

These are three steps for adding content to a Joomla site:

Step 1. Categorize

Step 2. Add

Step 3. Show

But why do it this way? Here are answers to some of the questions you might have at the moment:

- **Why not create our menu links first?** Because we wouldn't have anything to link to. We wouldn't have any articles to show.
- **Why create our categories first?** Imagine you are building a big Joomla site. You might be planning 50, 500, or even 5,000 articles. I've seen Joomla sites with more than 100,000 articles. How would you organize that many articles? Categories allow us to organize all our articles. Our "Location" article goes in the Information category. Our "Zoo" article goes in the Attractions category. That way, the articles won't get mixed up.
- **Why bother creating links at all?** Remember when we first added our articles but couldn't see them on our site? Menu links are what allow people to see our articles. If people can't click through to the articles, they can't see them.

We regularly meet Joomla students who have tried to teach themselves and got stuck. Most of the time it's because they didn't know about this workflow:

- Some of them tried to make their menu links first and wondered why they had so few choices.
- Some people wrote all their articles first and then ended up with a big mess of unorganized articles.
- Some people added their categories and articles and then stopped. They looked at their site and got frustrated because they couldn't see what they'd written.

Follow the workflow and creating your Joomla content will be easy. Here it is one more time:

- Step 1. **Categorize.** Create categories so that you can organize your articles.
- Step 2. **Add.** Write your articles.
- Step 3. **Show.** Create menu links so that people can click through and see your articles.

Now that we've learned the Joomla CASH workflow, let's practice it.

Practicing the CASH Workflow

Think back to the categories and pages we planned earlier:

Information

- Climate
- Location
- History

Attractions

- Museum
- Zoo
- Aquarium

Transport

- Trains
- Buses
- Airport

We've completed our first category: Information. Here's what we'll do next. We're going to give you a full step-by-step guide to creating the Attractions category, articles, and menu links. Then we'll let you tackle the Transport category by yourself. Sample text for all of the articles for these categories is available at www.joomla3explained.com/chapter5.

Step 1: Categorize

1. Go to Category Manager under the Content drop-down menu and click the “New” button.
2. Enter *Attractions* in the Title field and click Save & Close. Check that your Category Manager looks like Figure 5.26.



Figure 5.26 Your Category Manager with the Attractions category added

Step 2: Add

1. Go to Article Manager under the Content drop-down menu and click the “New” button.
2. Enter *Museum* in the Title field.
3. Choose Attractions from the Category drop-down menu.
4. Copy and paste the text from www.joomla3explained.com/chapter5 into your article.

5. Click Save & Close and then add the “Zoo” and “Aquarium” articles. Check that your Article Manager looks like Figure 5.27.

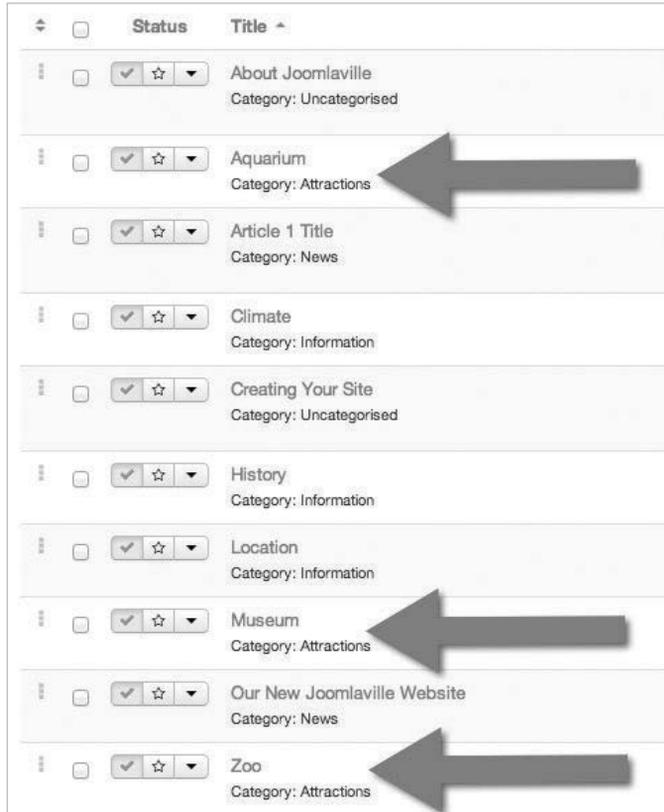


Figure 5.27 Your Article Manager with the Attractions articles added

Step 3: Show

1. Go to Main Menu under the Menus drop-down menu and click the “New” button.
2. Click the “Select” button next to Menu Item Type, and then click Single Article.
3. Click the “Select” button next to Select Article, and then click Museum.
4. Enter *Museum* in the Menu Title field.

5. Click Save & Close to complete the creation of your menu link.
6. Add the Zoo and Aquarium menu links. Check that your Menu Manager looks like Figure 5.28.



Figure 5.28 Your Menu Manager with the Attractions menu links added

Now that you've finished using the CASH workflow, your Main Menu should look like Figure 5.29. Click on the links, and you'll see all the articles you've written.

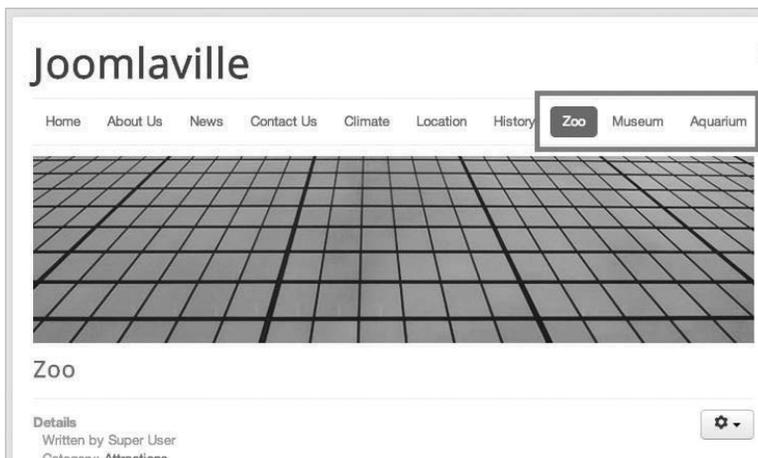


Figure 5.29 Your Attractions articles shown in your Main Menu

Congratulations. That wasn't too bad, was it? If you're ready, let's see if you can do that again but without step-by-step directions:

- Your task is to create the Transport category, articles, and menu links.
- Sample text for all three articles is available at www.joomla3explained.com/chapter5.
- If you get stuck, don't worry. Full instructions are also available at www.joomla3explained.com/chapter5.
- When you're finished, your Main Menu should look like Figure 5.30.

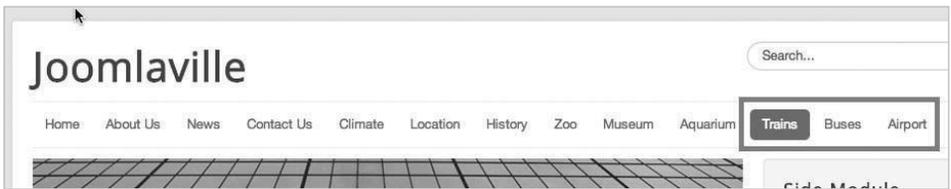


Figure 5.30 Your Transport articles published in your Main Menu

If we take a step back and look at your whole site, it should look like Figure 5.31.

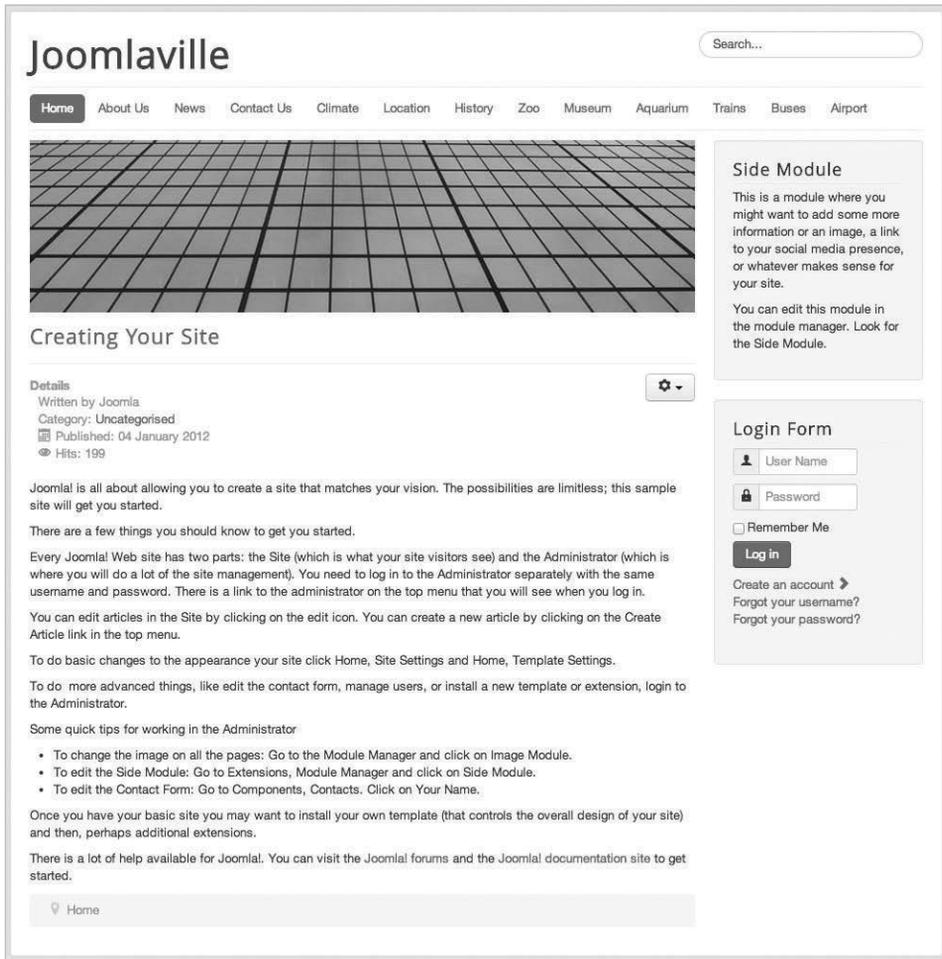


Figure 5.31 Your Joomla site at the end of Chapter 5

Congratulations! You've done an excellent job to get this far, and by understanding the CASH workflow you've found the key to building a Joomla site.

If you put this chapter down and don't remember anything except Joomla's CASH workflow, you'll be in good shape. Write it down, print it on a T-shirt, sing it in the shower, tattoo it on your arm, or do whatever else you need to do to remember it. This is how you add content to your Joomla site:

- Step 1. **Categorize.** Create categories so that you can organize your articles.
- Step 2. **Add.** Write your articles.
- Step 3. **Show.** Create menu links so that people can click through and see your articles.

What's Next?

We now know how to organize, create, and show our articles.

That's great, but currently those articles aren't very interesting. The articles are just plain text—there's no formatting, no images, and no links to other pages. That's the problem we're going to solve in Chapter 6, Joomla! Content Editing Explained.

Turn the page, and we show you to how to create articles with formatting, images, links, and more.

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