# A Joomla 1.5 very Rough Guide
## by Jason Gallagher

**Introduction**

*Repeat after me: Articles, Sections, Categories, Components, Modules, Module Positions, Mambots, Extensions, Plugins, Oh My!*

This is meant to be a no-nonsense guide (ok perhaps a wee bit of nonsense, but I PROMISE, I won't call you a dummy) to understanding the basics of Joomla's backend. It is only a rough overview with some helpful tips but is by no means complete. This guide does not cover Joomla's installation or templating (among other things) and assumes you have your site up and running and you are ready to dig in.

If you are having trouble understanding Joomla's array of arcane terminology (as I did in the beginning), I am hoping you'll find this at least a refreshing place to start. Before getting frustrated, I suggest reading from cover to cover, as many things will eventually tie together (hey it's not Ana Karenina, it's only 17 pages).

One thing to keep in mind is many times I've combined headlines with instructions for navigating to the place that relates to the headline. For example in the articles section, you would choose: **Content-->** **Article Manager** in Joomla's back end to edit articles.

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## Contents

## Other Resources and advice

Joomla is a powerful tool in knowledgeable hands. Try an be patient and dedicate enough time to learn it. As with anything that allows you to do as much as it does, it can be pretty challenging to fully learn. But I can tell you from my experience, at least from the point of view of website designers and clients, I've tried many and I have yet to find anything that comes close to Joomla's combination of flexibility and user friendliness.

How difficult it will be to get up and running is going to depend on what your role is. If you are mainly an administrator/webmaster, this manual is especially for you. If you are a graphic designer or developer, you can get a lot of the theory you need here, but you'll probably also need to turn to other sources for more information.

Here are some other resources you might try:

### Installation, tutorials and more help
If you are looking for the Joomla Installation Manual or a more step-by-step tutorial style, you can find that and lots more at http://docs.joomla.org/.

If you are interested in designing your own template, I highly recommend the Joomla 1.5 template tutorial at www.compassdesigns.net.

www.joomlatutorials.com (many Joomla 1.5 video tuts) and www.scribd.com/search?query=joomla are packed with tutorials.

Last but certainly not least, the Joomla forums are at www.joomla.org.

### Blogs
There are lot to choose from, but here are a few good ones that I sometimes read:

http://www.alledia.com/blog - Steve Burge. Lots of good all around Joomla tips, extensions, marketing and SEO.

www.compassdesigns.net - Barry North hosts a popular Joomla Blog.

http://www.joomlaperformance.com/home - Anthony Ferrara, core Joomla developer focuses on performance issues here. He also has a nifty tool to check your site's performance.

## Login

There are two ways to log into the administrative area of Joomla. The front end log in provides simplified admin capabilities, while the back end has all of the options.

**Front End**

To log into the front end, use the login form on the front end of your web site. Once you've logged in, you will notice small pencil icons to the right of the article titles. If you click on these, you can edit the article directly in place without having to log into the back end. This is the easiest way to make basic changes to your articles. If you have the correct permissions (see USERS), you can also change the title and section/category for the article, as well as a few other parameters.

If you have published a user menu, you can also submit a new page and/or edit your personal details.

**Back End**

Bookmark: http://www.yoursite.com/administrator. The back end consists of icons for the common functions, dropdown menus at the top, and some handy statistics for your site on the right. Explaining in detail what everything does is beyond the scope of this, but I'll break it down into the important areas.

## Back End Interface

**Site**--> Control Panel
Takes you back to the main admin page from anywhere.

**Preview button** (upper right hand corner)
Click the preview link at the top right to view the live site.

> TIP. It's useful to have a separate browser tab or window open while you make changes in the admin. Don't forget to hit refresh in order to see the updates. I am often refreshing the second browser tab/window to preview the results as I work.

**Log Out**

Logs you out. For security reasons, be sure to log out when you're done. By default, the system is set to automatically log you out after 15 minutes of non-activity.

**Pagination**

Most of the screens in the back end are paginated when the list gets long. This means only up to 20 items will be visible at a time, until you choose "next". You can choose to view a greater amount of items at a time (like all) from the drop down menu at the bottom.

## Users and ACL (Access Level Control)  Site--> User Manager

**ACL for publishing workflow**

There are several different kinds of users in Joomla and each has a set of permissions granted to them:

**Guests** - Anonymous users of the website, no special rights.

**Registered Users** - Normal visitors who register.

**Authors**- Can submit content for approval in the front end only. A publisher or higher must approve.

**Editors** - Can submit or edit existing content, front end only. A publisher or higher must approve.

**Publishers** - Can publish plus do any of the above, front end only.

**Managers**, **Admins** and **Super Admins** - All of the above plus can log into the back end w/increasing rights.

After installation, Joomla starts out with one super administrator. To add or edit new users manually, you must be at least a manager. To create admins, you must be a Super Admin.

> **TIP**. For a small organization with one web master, much of this may be unnecessary. But even if you choose not to use a publishing workflow, having a publisher or manager user is a nice way to simplify the options for less experienced users.

**ACL for displaying content**

Aside from fontend/backend permissions, you may also use ACL to display certain content to certain visitors. Currently there are only three choices for using ACL this way, although the upcoming Joomla 1.6 is set to expand upon this. They are **Public**, **Registered**, and **Special** (which stands for Authors and above). You can assign the access level to any menu item, article or module in the back end. The default is "public", but by choosing "registered" or "special", the item will only appear to that user group and above.

> **TIP**. "Special" ACL is used for the User Menu items in the default sample content. This allows for links such as "submit article" to be only visible for author users and above.

> **TIP**. You can use "registered" ACL as an simple way to create member's only content.

> **TIP**. You can safely experiment on a live site by using access levels. Simply assign something (such as a new menu item and page) to the "special" access level and publish it. Then only users who are manager and above will ever see it. (Don't forget to log in to the front end before viewing the live site, or it won't appear).

**Registration and ACL**

If someone registers at your site, a new user is created automatically. Normally these new users will become Registered Users, however you may choose your preferred access level in Joomla's global configuration.

## Articles   Content--> Article Manager

Articles are more or less what Joomla calls content. Usually this means pages, but you can put them to use as blog entries, news items and more. For example, the newsflash module in the default Joomla content uses separate articles for each "newsflash". I'll explain more about this in a minute...

Articles are created by going to the article manger and clicking on the new button. When you create an article, there are many choices, most of which aren't very critical if you just want to create basic content. Basically, you give it a title, assign it a section and category (or uncategorized), and choose

enable if you want to publish it. If you don't choose enable, it exists but won't be live until you do. But even if you enable it the article won't necessarily be visible on the live site as you probably still have to create a link to somehow get to it! That's usually done by making a menu item for it.

Again, there are exceptions. The newsflash module for example needs no menu item linking to it in order to display. Instead, it will simply "flash" all articles assigned to a particular category (default is "newsflash"). If you are using the sample data, any new articles you create in the newsflash category will be added automatically. Of course you'll probably need to reload your page a few times before the new one comes up, as it is set to be random in the module options. Other modules may work in a similar way.

> **TIP**. It wouldn't be hard to turn a newsflash into clickable teasers leading to a page with more content. They could be used as news items, products, recipes or anything desired.

**Article Parameters**
See **Menus**

## Menus Menus--> (choose the menu you want to edit)

Menus are created and edited in the back end. When you edit a menu in the menu manager you can publish, unpublish, or create new menu items (links). If you click on them, you can change their properties such as where they link. If you add a new menu item to a menu, you are given the choice of what kind:

- **Article**. Choose Articles--> Article Layout. Name it, than choose the article in the top right from "select an article". This creates a new link in the chosen menu to a single article.

- **Category Blog**. Choose Articles--> Article Layout--> Category Blog (or Category List). This dynamically creates a page with all articles from a chosen category. Can be teasers (with "read more" links), or full articles depending on how you set up your articles. There are many parameters for choosing various layouts and pagination (like how many articles per page). Category List outputs a table with links to all articles in the category. Make sure to assign articles to the category

you choose, or none will show up!

- **Section Blog**. Choose Articles--> Article Layout--> Section Blog (or Section List). Similar to Catagory Blog/List but outputs an entire section and all of its categories.

- **External Link**. Usually to another website, but can be used to link to a particular page in your website if it's not part of Joomla's normal system (useful with some 3rd party components).

- Built in (such as weblinks or contacts) and 3rd party **Components** are also listed as choices. Start here before resorting to External link when linking to a component.

Anything you create a link to will show up in the MAIN BODY of the site. You can not create a link to a module, but you can assign modules to certain pages (see **modules** for more info). If you need to place content in a module, you can either use a custom module (choose new module in the module manager), or you can download a 3rd party extension like the **PlaceHere** module which can insert articles or whole sections/categories as module.

**Submenus**
Unlike the section/category system, menus can be nested as many levels as you like. To create a submenu, first create the parent. Next create the submenu. Inside the submenu, under "parent item" choose the parent. Rinse and repeat! If you choose "top" that makes it a top level link in the menu (no children).

There are a number of extensions which can make some nice css and/or javascript menus automatically from your nested menus. **SWmenuFree** is free (was that a surprise?) and works well. It doesn't produce the best code, but it's very user friendly to set up.

**Parameters for Articles and Menus**
There are many settings for the presentation of articles and pages such as Category/Section Blog (explained later). The options include displaying author names, publish dates, pagination options, pdf/email/print icons, and more. There are global options to set the defaults for the whole site as well as ways to override those global options in both a menu items or each individual article.

To reach the global options, you choose content- -> article manager. Near the top right hand corner, click on the parameters button. For menu level options, open a menu item and for article options, open an article.

> **TIP**. For SEO purposes, you can manually set your HTML page <title>s, in menu items under: Parameters (System). (Otherwise titles are whatever you named the menu items). However, if you enter something into "page title" and "show page title" is set to yes, it will also print on the front end. Be aware of this because if you are already printing the article title you could get duplicates.

## Editors

The WYSIWYG editor in Joomla is pretty similar to working in a word processor like MS Word. Since there's a lot of good instructions with screenshots already written for Joomla's TinyMCE, please refer to those. Here a few quick tips.

- If you hit the enter key, you will create a paragraph and skip a line (leaving blank space). If you don't want that space, holding the shift key with the enter key gives you a line break.

- You can paste text (but not images) from MS Word, but you may have to fine tune it.

- If you need to insert an image, don't click the image icon. Instead, choose the word "Image" at the bottom of the editor. A pop up will appear with the Joomla media manager. You also have the option to choose an image from your local computer.

- If you need to edit the properties of an image already placed, then you will need to choose the image icon in the toolbar instead.

- The "Read More" text button at the bottom can be used to create teaser content on one page and have the rest of the article finish on another (you can block unregistered users from reading more if desired).

- The "Page Break" text button is similar, but creates a multi-page article (Part 1, Part 2, Part 3, etc.).

- Making simple text edits and adding images are not difficult. Even creating

a more precise layout can be done using tables or css, but this will take some practice and is not always the best idea on a professional site.

> **TIP**. Using the HTML button, you can even create entire layouts in Dreamweaver (or your chosen editor) and paste in the code. But any images will only show up as place holders. You would then one at a time select each image, click the image button (bottom one) to upload the actual image. Alternatively, you can start in the media manager and upload the images all at once to have the them already available and uploaded before you begin. However, back in the editor you will still need to assign each image with the image button.

**Styling in the Editor**

To keep your site professional and the formatting consistent, I highly recommend being conservative with the formatting options of the editor (bold/italic, bulleted lists are usually ok). Instead use the styles that are available to your template if possible. When I design sites for my clients, I create an editor.css and provide a cheat sheet of usable styles. If your graphic designer did this, or if you have a professional template, you will be able to access the styles that the designer intended.

The main way to apply a style that was prepared in advance, is to highlight some text and then choose a class from the style menu. Some styles may also exist in the Paragraph Menu. These are called Heading 1, Heading 2, etc. Besides being a good choice for head/subheads throughout your site, heading use relates to SEO. Ideally, all style choices should be consistent throughout your site. If you are unsure which to choose, ask your designer or template maker.

> **TIP**. Things may be close, but they probably won't look exactly as they will on the website. From time to time, click "Apply" and refresh the previewed page in another browser tab/window.

## Front Page Manager Content--> Front Page Manager

The Joomla front page is capable of displaying various layouts of content items. Content items (articles) will show up in the front page manager if they are assigned as "front page" in the ARTICLE MANAGER. Once articles are in

the Front Page Manager, you can chose to actually publish them or not and assign an order. You could for example have a list of different news items or blog postings, or you could assign a single article/content item.

The front page manager only affects what's in the MAIN BODY. You can change other aspects of the home page (or any page) by assigning modules selectively to the page (see **Modules** for more information).

> **TIP**. To change the layout and options for front page articles (aside from the order),  you must go to the "home" link in the main menu. Here you can specify the number of articles and columns, pagination options, and options for including author names, dates, pdf links, etc. Changing settings here will override your global options for just for the home page.

## Sections and Categories Content---> Section Manager or Category Manager

Think of sections and categories more like categories and subcategories. The current category system of Joomla is limited to these two levels.

That said, if your site requires more than the system provides, you can always create a manual hierarchy using menus. Besides creating nested drop down menus (explained in **Menus**), one way to achieve this is to create a separate menu for each category/subcategory you need. Since modules (menus are modules) can be assigned to particular pages, you could create category and nested subcategory pages with these menus assigned to them. If you are interested in this idea, I recommend doing a search in the Joomla forums where you'll find a lot on the subject.

While you can't assign the same article to more than one category, you can create "Alias" menu items which enable you to link more than once to the same article. This avoids having to create duplicate articles (which is bad for SEO). If you need an alias, it is one of the options when you create a new menu item.

The disadvantage to using menus (and aliases) for all of your category structure is that Joomla's dynamic section or category layouts (like category blog) don't feed in from menus. Dynamic layouts need articles to be assigned to sections and categories. However, if you put a little thought into it, you

can usually combine the two approaches to achieve something usable.

**Section and Category Descriptions and Images**
If you open up the items in the section and category managers, you will find an editor for the description. The section or category descriptions will display in various menu links like Section Blog, Category Blog (usually at the top) etc., IF you choose to allow them in the parameters.

A Section (or Category) Image is an image selected from the dropdown menu you can choose to display. But because you can insert images in the section/category descriptions and have more control over placement, I see little reason to use this feature.

## Media Manger Site---> Media Manager

This is where Joomla typically stores media including images, flash, mp3, etc. If you upload images/media into your Joomla articles, this is where they will end up. The media manager is useful for adding  a lot of stuff at once or to manage your collection. It works a lot like My Computer for Windows (or the Mac Finder) and you can have your own folder structure.

> **TIP**. If you need to add large files like mp3 or video, you'll need to make sure to allow the right file extensions/mime types and increase your maximum upload limit in the global configuration. If you are still having problems, you may have to contact your hosting (or check your php.ini file) to see if they have a lower maximum upload size than you need. That said, at this time there seems to be a bug when trying to add certain media types.

## Global Configuration Site--> Global Configuration

Here are the settings for your overall site configuration. I tell most of my people not to change the settings here except perhaps to the change the global metatags or take the site down temporarily. If you are more experienced, here are the settings for search engine friendly urls, caching, gzip and other site wide options.

## Modules & Module Positions Extensions--> Module Manager

Modules are like blocks of content and module positions are the different areas available for the modules to be placed into. The module positions basically make up the grid of the website and are defined in the template. There is also a "main body", which is kind of like a reserved module position for your main content. Generally articles and components (like Weblinks, Newsfeeds, or 3rd party) go into the MAIN BODY which is typically the center area. The main body exists on every page (all though you can trick it into being blank) and the Joomla menu links always refer to the content which goes there.

Joomla has many available built-in modules (not to mention 3rd party) that can display certain content. Components sometimes have companion modules for themselves. Polls for example are created and managed in the Polls component. But for each poll, you need a module to display it. After creating the poll in the polls component, you would need to create a new Poll module, then select the poll in its settings, assign it to a position and tell it which pages to appear on.

Many 3rd party components such as Virtuemart or Community Builder, come with various modules and plugins that must be installed separately from the main component.

Incidentally, menus are modules. When you create a new menu in the menu manager, then add menu items (links) to it, a corresponding module gets created automatically. To make it appear in your site you would next open the menu's module in the module manager, give it a module position, target the pages to be displayed on (entire site is an option), and finally publish it.

> **TIP**. To assign a module to multiple pages, go to Select Menu Item(s) and hold the control key down as you click. If you wanted to choose all but the home page for example, you'd need to ctrl-click all pages besides any "home" links. Also, don't forget to choose "enabled" if you want to publish it.

If the template is designed well, positions will show up if a module(s) is published to it on ANY GIVEN PAGE, or they will collapse if they are empty. More than one module can be published in each position. If more than one is published in the same position, they have an order which can be set in the

modules. By changing the order, you can get modules to stack differently even if in the same position.

In the rhuk_milkyway template for example, several modules are published by default in the left and right positions. If you were to unpublish all of the modules in the either position, that entire column would collapse. In fact, that is how a 2-column layout is achieved on many pages in the site. A well designed template can be very flexible in this regard.

Note that there are probably some positions listed as choices aren't used in a given template. To find out what positions are available in your template (and where), there's a trick you can use to make Joomla visually show you.

If you bought the template from a professional site they might have a diagram available, but here's a trick you can also use to visually show your module positions:

http://www.yoursite.com/index.php?tp=1   (for the homepage)

Basically, if you add ?tp=1 to the end of your url in the browser, it puts Joomla into module position preview mode (note: the main body is not labeled).

You can also assign an "access level" to any module. By choosing "registered" or "special", the module (including menus) will only appear to that user group and above.

> **Tip**. This is an easy way to create member's only content. However, don't use "special" for this unless you don't mind members having the right to edit articles! (Better user permissions are supposed to be coming soon).

> **TIP**. You can safely experiment on a live site by using access levels. Simply assign a module, menu, or menu item (like a new page) to the "special" access level and publish it. Then only users who are manager and above will ever see it! (don't forget to log in to the front end before viewing the live site, or it won't appear).

Sometimes it's useful to duplicate a module. An example might be having the "latest news" of two different categories. To add that additional latest news, or even see what some of the available modules are you may not be

aware of, you click on the NEW icon at the top left in the module manager.

One example besides the usual suspects you might find useful is a module called "custom". This module gives you the ability to place content in any module position. However, if you want to use an existing article (or a section/ category), I suggest downloading the free **PlaceHere** extension from the Joomla exchange.

## Components Components--> the component

Components are built in or third party extras that add functionality to Joomla. There are polls, contact pages, banners, web links, etc. built right in and many more available to download. To manage a component you use the component menu. But in order to actually publish the component you must usually create a menu link to it. Linking from a menu puts the component in the MAIN BODY area.

One thing to keep in mind is that some components can use (or must use) modules to display their content (Polls use a module to display the poll, but the voting results end up getting displayed in the main body). Using a module puts the content into a MODULE POSITION (See **Modules**). The choice of linking to the component or using a module depends on the component, but most are the former. Some components such as **Virtuemart**, **Community Builder** or **Fireboard** forum come with several optional modules you can place if you desire.

I'm not going to cover all of Joomla's built in components, but in the next section (**extensions**), I'll detail a sampling of some of the mostly 3rd party ones I typically use.

## Extensions

**Banners** (a default component)
A simple rotating banner ad system that handles multiple clients and tracks clicks.   The banners themselves are managed in the Banner component, but a banner module(s) must also be published in the module manager to appear in the site.

**Polls (**component and module **-** see **Modules** for description)

**Virtuemart** (component)
An e-commerce shopping cart extension for selling products or downloads that tightly integrates with Joomla. Stay tuned if you're interested. I am currently finishing up a companion guide for VM.

**Sql Dumper** (component **-** See **Backup** for description)

**SWmenuFree (**component and module - see **Menu** for description)

**Linkr (**plugin)
Useful plugin that adds a new button to your editors. This button allows you to insert links to other articles and pages inside your articles. Normally you'd have to manually type in a url. This makes the experience more user friendly.

**Chronoforms (**component)
A component that adds forms with validation into Joomla articles. This is a good forms component to use if you already know how to create forms in Dreamweaver or HTML and you can style them any way you like. Joomla will email you each time the form is submitted, but you can also view the data in the backend and even export a spreadsheet. Last I checked, it needed GZIP disabled to enter the component (not a problem for the live site).

**Xmap (**component)
Automatically generates a sitemap with a dynamic XML feed. The XML feed can be submitted to Google and some other search engines. However, if you add new Joomla menus, you must manually add them to Xmap.

**PlaceHere (**module **-** see **Modules & Module Positions** for description)

## **Plugins** Extensions--> Plugin Manager

Plugins (previously called mambots) are software that dynamically changes stuff... for lack of a better description (Virtuemart calls them "those little workers"). Examples are a plugin that obfuscates email addresses from spam bots, search engine friendly URLs, editors, bridges from 3rd party components, and a other geeky stuff.

3rd party plugins can also insert things into your articles. Examples are social bookmaking widgets, forms, videos, etc. I recommend using plugins with caution, and some are known to cause a performance hit.

Some plugins have useful settings to change if they are opened in the plugin manager.

## Backup

Always keep a recent backup of your site. Backups are useful in case of data loss, if your security has been compromised by malicious attackers, or simply if you made an error and need to revert the site back to a previous state.

There are two parts to a complete back up of your Joomla site. First is the database the other is the the file system.

### Database
Instructions on how to backup a database using **PhpMyAdmin** (common on most web hosts) can be found at: http://www.phpmyadmin.net/documentation/#faq6_4

Alternatively, there are several backup extensions for Joomla 1.5 you could look into. If you are interested in GPL, at this time there are none to my knowledge that automate the whole process. However, there are a couple of good database backup only extensions. **SQL Dumper** (available at http://extensions.joomla.org) can be used for both creating and restoring Joomla databases. Although if for some reason Joomla becomes impossible to log into, the backup will need to be restored through PhpMyAdmin or another method.

However you back up your database, you'll need to know the user name and password for the database. These codes are almost always different than FTP, your host's control panel, etc.

It is recommended to back up the database at least twice per week or even everyday (and more) if you have an active site.

**File System**

Besides the DB, you should also back up your site files. The interval for this depends on how often you or your users make changes to the file system. If users can add photos and media or you make changes to the site other than simple text edits, it should be done often. This is best done with an FTP program and is no different than backing up a standard website. Download all the files and folders that exist in the main directory, and save it to a folder on your local computer. Be sure that the file and directory structure remains the same as it is in the live site. You could then burn a CD or save to an external hard drive if you desire.

> **TIP**. If you've never used an FTP client, most hosts provide an FTP capability from within their control panel.