USING JOOMLA
LEVEL 2 (TRAINING)

THE UNIVERSITY OF ALABAMA IN HUNTSVILLE

OVERVIEW

This document is designed to provide guidance and training for incorporating your department's content into to the Joomla Content Management System (CMS). Each step in the process is outlined below.

- JOOMLA STRUCTURE
- LOGGING IN
- ABOUT YOUR SPREADSHEET
- CATEGORIES
- ARTICLES
- MENUS
- MODULES
- ADDING LINKS

AUDIENCE

This document is for Level 2 users with the ability to edit menus and modules and modify content.

USER LEVELS

There are three user levels defined for the UAH website.

LEVEL 1 – Site Administrator – Grants permissions and manages access, manages main homepage.

LEVEL 2 – College or Department Administrator – Creates the navigation within a particular college or department, and makes content publicly available. Restricted to one or two people per college or department.

LEVEL 3 – Content Editor – Makes text and image modifications and creates content, restricted by content access definitions only.

JOOMLA STRUCTURE

Joomla is the Content Management System (CMS) used to manage the UAH website. A Joomla page is constructed from a few primary elements: Articles, Menus, Modules and Categories.

ARTICLES

An article is any piece of content and is fully manageable by a Level 3 user. It is the primary building block for every page. It can contain text and images, and it is managed by a WYSIWYG interface similar to Microsoft Word.

MENUS

Menus are used to organize content for navigation. A menu is built using articles or other menu item types to create a folder-tree structure. It can be modified by Level 1 or Level 2 users. A menu is displayed using a module.

MODULES

Modules are used to place dynamic blocks of content on a page. Blocks can include Menus, Slideshows, News and Events feeds, etc. Modules can modified by Level 1 or Level 2 users. They will be primarily used for navigation and news and events. A menu module is associated with each article in the menu to maintain the navigation between articles.

CATERGORIES

Categories are used to organize content access and for use in modules.

LOGGING IN

To log in:

1. Using a web browser, access http://www.uah.edu/administrator/.
2. Log in using the credentials in your packet.

ABOUT THE SPREADSHEET

You may have been provided a spreadsheet as a starting point for constructing a website according to the current site design. In the process of getting a few articles created and linked, you will learn the basics of site construction in Joomla. Each spreadsheet contains the following columns:

| Top Level Menu	Secondary Menu Items	Existing Pages	Design Reference Page	Notes
This column contains menu headings used across all colleges: **Welcome** **About** **Departments** **Research** **Faculty and Staff** **Services** **Student Affairs** **Alumni** **News** **Contact**	This column contains suggested second level menu items from your existing web site. **Some Secondary Menu Items will have Third and Fourth Level Menu Items.**	This column contains the corresponding web address where you will find the content for the **Secondary Menu Items**.	This column contains an example page for you to fashion your corresponding data to.	This column provides suggestions and comments about your existing site that you may want to consider when updating to the new site.

CATEGORIES

Categories in Joomla are the basis for managing Level 2 and Level 3 access. Each college will have access to a main category with departments. Think of Categories as folders where articles are stored. Categories can also be used to allow users to add articles to a single category like News or Events and then build a module to display the category.

You will be given access to a primary category for your college. All other categories you create will be within that category.

The following steps will show how to create a News or Events category in your college, so that you can have a News and Events section on your webpage. (You can create categories for the distinct departments in your college or department.)

Note: The College of Business Administration will be used as an example throughout this document.

1. Select the **Category Manager** from left-side menu on the **Control Panel** page:
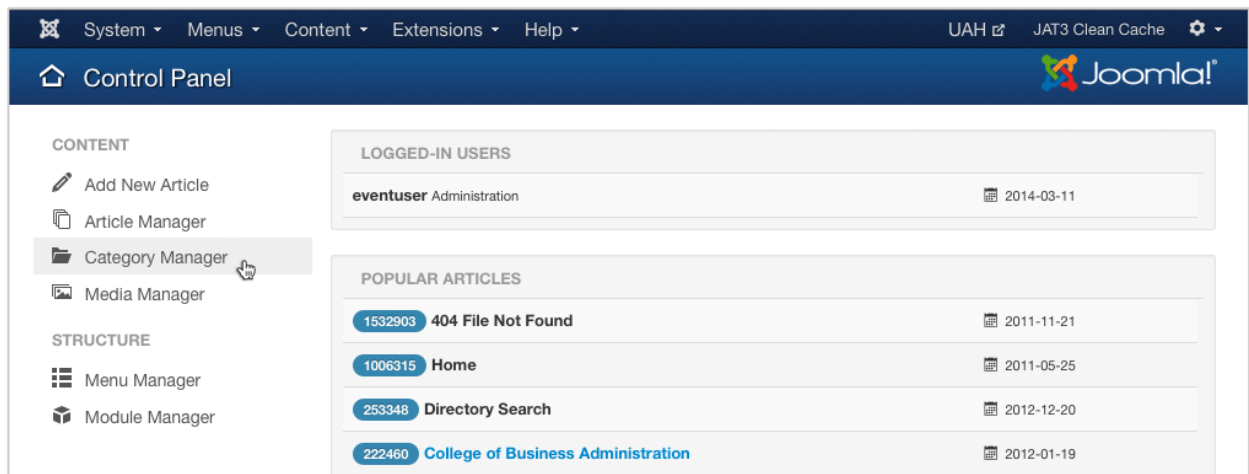
Or **Category Manager** from the **Content** dropdown menu at the very top of the page:
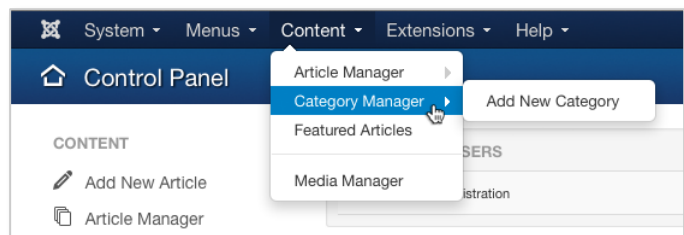
2. You will only have access to categories within your college. To create a Category, click **New** in the **Category Manager: Articles** section:
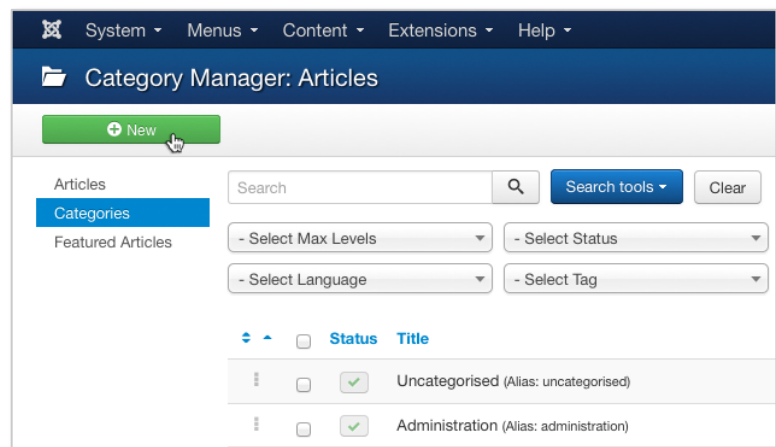
3. Enter the category **Title**, which will be the department name. From the **Parent** dropdown menu on the right side, select your college name. Click **Save & New**. Repeat these steps for each of your departments.

Tip: Always **Save** between actions in Joomla. When editing an existing item, there are the following buttons:

- Click **Save** periodically to save the article and keep the editor open to continue working.
- **Save & Close** when you are finished and want to exit the article editor.
- **Save & New** to close the current article and quickly create a new article.
- **Save as Copy** to create a duplicate article (except the information in the starred mandatory fields).
- **Close** to exit the editor after you have saved the article using one of the save options.

4. Select the News or Events category. A news article or event can be published to any page where News or Events categories are selected to show. **Note:** Because News or Events will be under college folders, enter **[your college]-news** in the Alias field and select your college or department from the **Parent** dropdown menu:
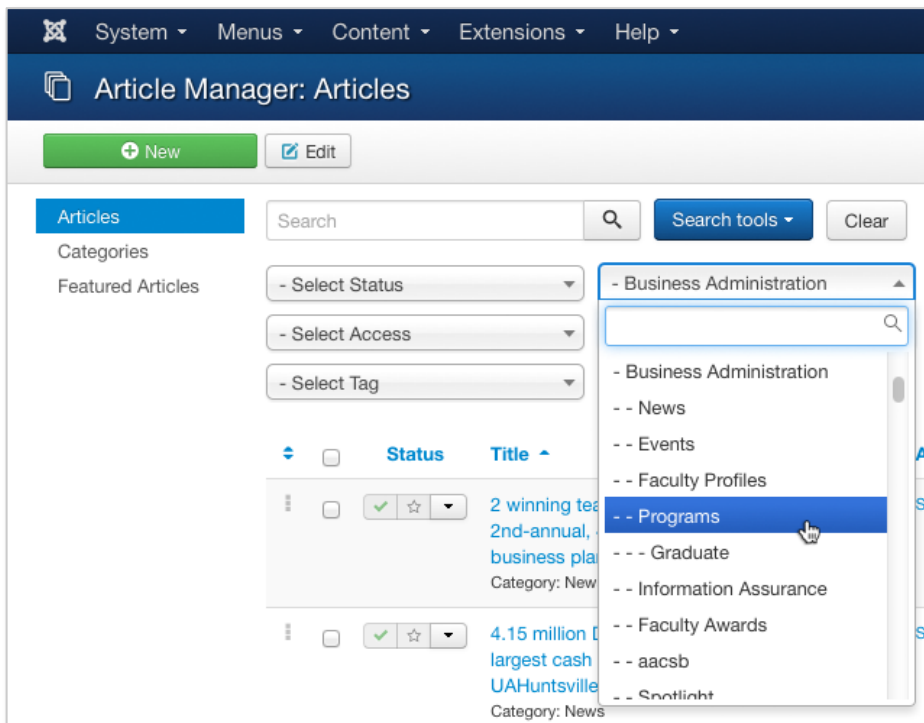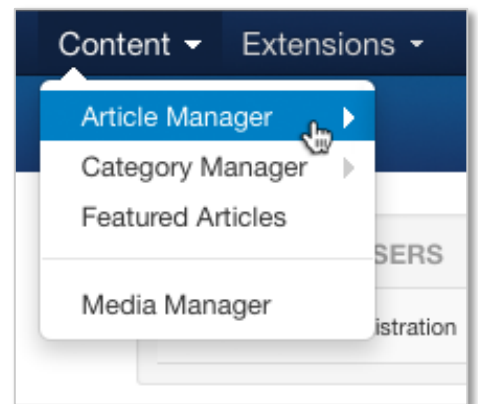
ARTICLES

It is a good idea to create articles prior to creating menus and modules, since the article is often used to provide the content for those items. You are only allowed to create articles in the categories that you created.

Note: In this exercise we will focus on getting the article in place so that you can begin building the other elements. We will discuss styles and images for the article in a separate Level 3 section.

All Menu Items must have an article or a lower Menu Item. If a Menu Item does not have a lower Menu Item, then you will need to create an article for that page.
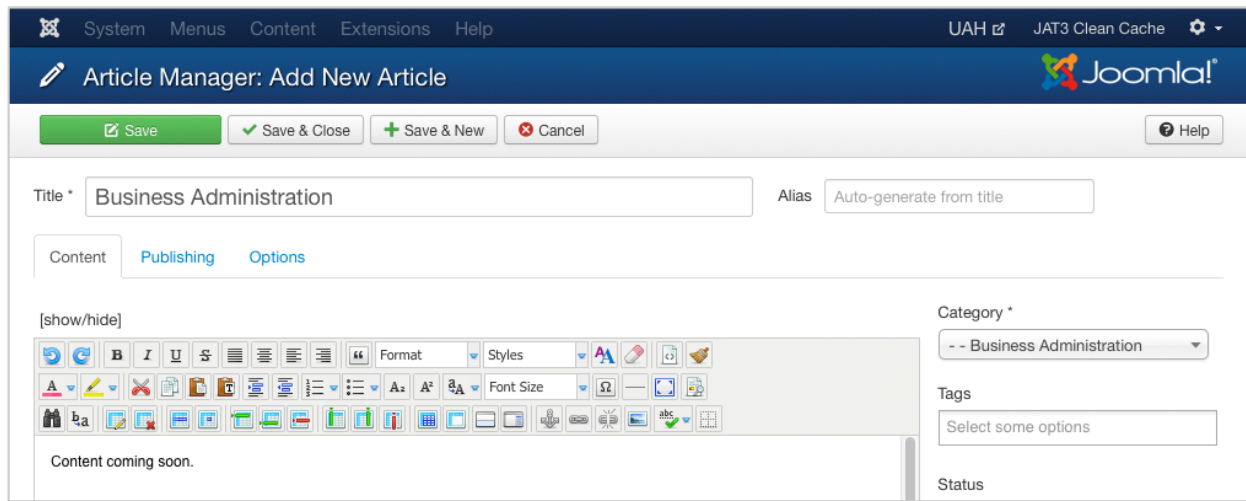
The first article that you create will be the landing page for the college, and it will have News and Events modules on it (if your college has both). Articles have the title of your college by default. Later, you can choose not to display that title on the article and add a new title using the *Heading 1* formatting tag within the article itself.

1. In the **Content** menu, click **Article Manager** (or select **Article Manager** from the Control Panel):

Tip: Use the Category filters (via the **Search Tools** button) in the Article Manager to work in a particular area. For example, if you are the Level 2 user in Business Administration, but you are working on the Programs page, select the Programs sub-category in the **Select Category** dropdown menu and all of the articles you create will be in the Programs category.

2. Click **New** to create an article. In the **Title** field, enter the name of the College/Department. Select a **Category**.
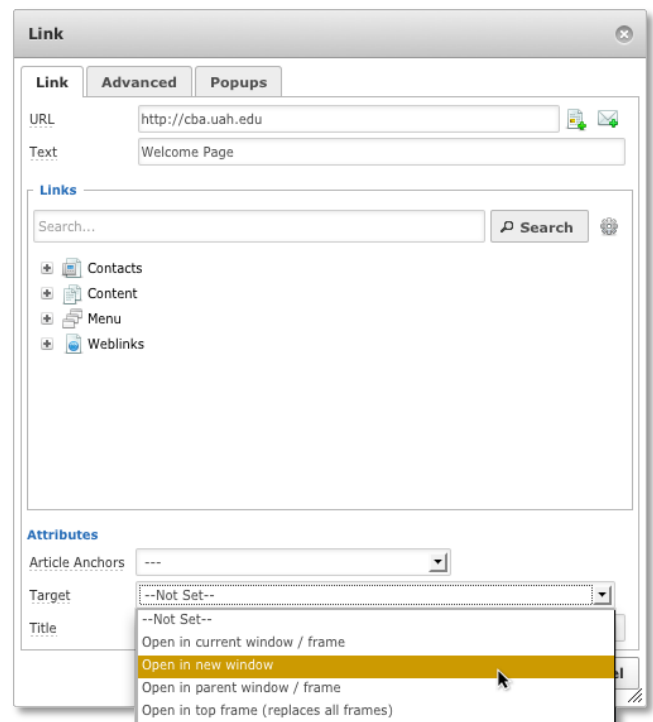

This is a temporary topic so that you (or a Level 3 user) can build the article later. You can simply type in **Content Coming Soon** or add a link to the existing page (from your spreadsheet).

To add a link, click the **Insert/Edit Link** icon in the Article editor toolbar:

3. In the resulting window, type the old site's URL (including http://), the text that will link, and select **Open in new window** from the **Target** dropdown menu. Click **Update**.

4. **Save** your Article. Follow the same steps for each of the Secondary Menu items that do not have Third Level Menu Items (from the spreadsheet), and for each Top Level Menu item that does not have a Secondary Menu associated with it. Also create articles for all Third/Fourth Level Menu Items (that do not have other menu items below them).

Note: Do not create landing pages for departments that will have separate menus or a News landing page at this time. These will be handled differently.

MENUS

Once your articles are saved, create the menus that will be used to navigate to those articles. You are not going to be able to link to your site until it has been approved, so you will need to create a menu that you can build outside of the main architecture that can be added later.

CREATING THE MAIN MENU

1. In the **Menus** dropdown menu, click **Menu Manager** (or select **Menu Manager** from the **Control Panel** left-side menu).
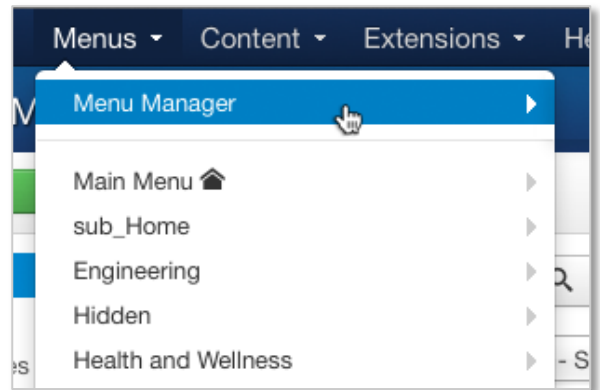
2. On the Menus tab, click **New** and enter the college in **Title,** and the college abbreviation in lowercase followed by the word *main* in **Menu type**. Click **Save & Close**.

CREATING THE MENU ITEM

1. In the Menu Manager, select **Menu Items** on the left-side menu, and then click **New** to create a new Menu Item.
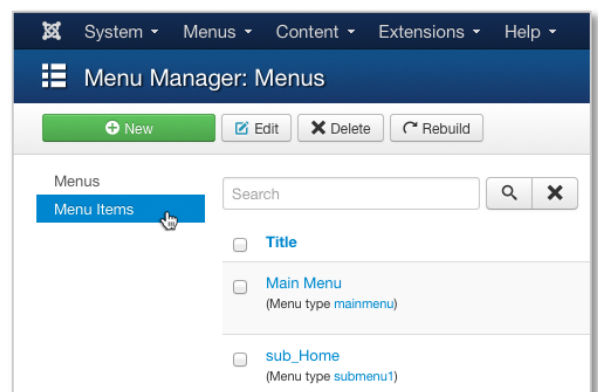
2. Enter your organization's name as the **Menu Title**. In the **Alias** field, enter the abbreviation in lowercase followed by the word *main*. In the **Menu Location**, select your college or department:

3. For the **Menu Item Type**, click **Select** to open the *Menu Item Types* pop-up window. From the listing of menu link options, select **Articles** to open a list of article types available for linking. Click **Single Article** (to link to the article you just created). The pop-up window will close and update your Menu Manager screen with your selection.

4. After selecting **Single Article** as the *Menu Item Type*, click **Select** on the **Select Article** option.

The **Select Article** pop-up window lists articles available for linking to a *Menu Item*. Use the filtering options at the top of the window to find the article you want to link to. You can search and filter by title, categories, etc., to limit your search to a specific college or department.

5. After completing all of the required *Menu Item* settings in the **Menu Manager** – *Menu Title, Alias, Menu Item Type, Select Article,* and *Menu Location* – click **Save** or **Save & Close** to save your Menu Item.

6. Open a new browser window or tab to preview the page created. (Leave this window or tab open so you can review the page as you continue creating it.) The **Alias** you selected in the menu manager will be the page URL address used to review the site. Add the alias for your Welcome Page to the main uah.edu site URL. (*Example: http://www.uah.edu/busmain*). The page should look something like this:
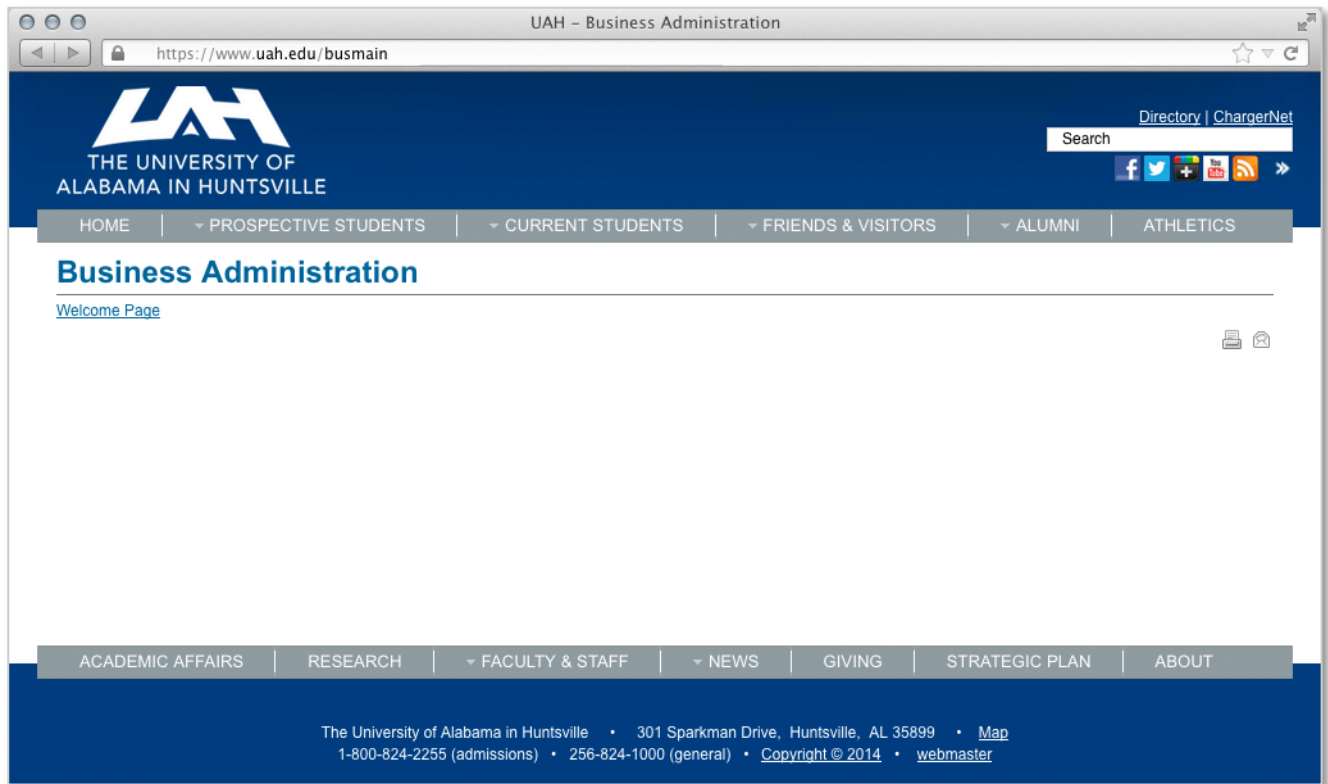
Tip: If you make an edit and it does not display on the webpage, you may need to clear the Joomla cache for the site. (This is different from emptying your own web browser's cache.) Click the **Clean Cache** link on the very bottom left menu bar.

CREATING THE WELCOME MENU ITEM

Follow the same steps as used in the **CREATING THE MENU ITEM** section.

1. **Menu Title** should be entered as *Welcome*. **Alias** will be *welcome*.
2. **Menu Item Type** will again be **Single Article**, and the **Select Article** option is the same page as used previously.
3. **Menu Location** is the same college or department name setting.
4. **Parent Item** should be changed from *Menu Item Root* to your college/department name. (This is so your *Welcome* menu item will appear below the left menu's heading).
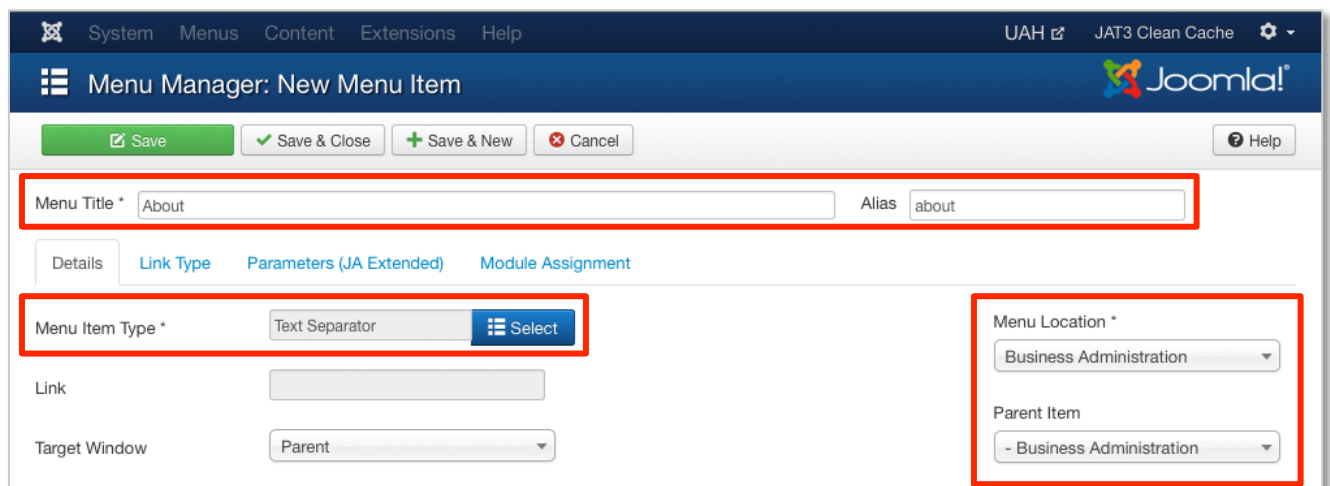
CREATING MORE MENUS

All other menu items will be created <u>under</u> the main college menu. Most Top Level Menus will have a Secondary Menu Item. To create an accordion menu (a menu that expands/collapses when clicked), use a *Text Separator* Menu Item Type. A text separator expands to show more menu items underneath it. Whenever there is a Menu Item with menus beneath it, make that Menu Item Type a *Text Separator*.
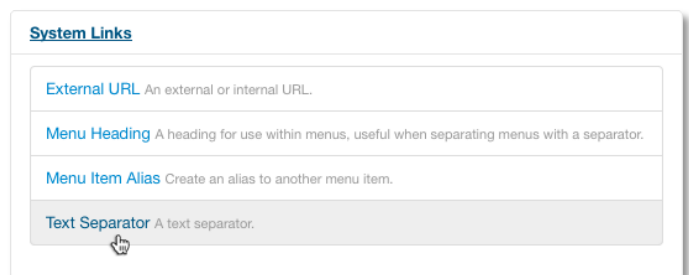
CREATING THE ABOUT MENU

The About menu is usually a Text Separator Menu.

1. In the **Menu Manager: Menu Items** area, click **New.** In the **Menu Title**, type *About*. In the **Alias**, enter *about*. As before, the **Menu Location** is the name of your college, and the **Parent Item** is the existing menu. (This means it will appear under the college's main page).

2. For the **Menu Item Type**, click **Select** to open the *Menu Item Types* pop-up window. From the listing of menu link options, select the **System Links** heading to open a list of link types. Click **Text Separator** (to create an accordion menu). The pop-up window will close and update your Menu Manager screen with your selection. Click **Save & Close**.

3. Next add all of the Lower Level Menu Items to the *About* accordion menu just created. For each item, enter the page name as the **Menu Title** and in lowercase (with dashes instead of spaces) for the **Alias**. As before, the **Menu Location** is the name of the college. The **Menu Item Type** will be **Single Article**, along the appropriate article linked in the **Select Article** menu.

   NOTE: Because these menus are part of an accordion menu, the **Parent Item** will be set to that text separator menu (in this case, the *About* menu) so it will appear under the selected menu item. In the Menu Manager on the Menu Items tab, click **New** and click **Select** next to Menu Item Type. Select **Single Article**. To save the menu and continue creating the next Lower Menu Item, click **Save & New**.

4. Repeat *Step 3* for each of the remaining articles to appear in the *About* menu. The **Menu Manager** should display all of the articles as menu items under the *About* menu:

Tip: If the Menu Items are not in the correct order, change the order in the **Menu Manager**. To the left of the Menu Item you want to move, click and hold the black move icon to *drag and drop* the item to change the order.

CREATING DEPARTMENT MENUS

USING MENU ITEM ALIASES

Some department links will point to their own menus, so they will be set up as **Menu Item Aliases**, which means they redirect to a menu located elsewhere. In this example, we are setting up *Text Separator* menus; when creating the actual menus for the departments, change the *Text Separator* menus to *Menu Item Aliases*.

1. In the **Menu Manager** on the *Menu Items* left-side menu, click **New** to create a new top level menu item. Select **Text Separator**. Enter *Departments* as the **Menu Title** and *department* as the **Alias**. The **Menu Item Type** is *Text Separator*. Make sure the same college is set for the **Menu Location** and **Parent Item**. Click **Save & New**.

2. For the next New Menu Item, enter the department name (example: *Accounting*) as the **Menu Title** and **Alias**. The **Menu Item Type** is **Text Separator**. The college is the **Menu Location**. Make sure the **Parent Item** is *Departments* so the item will appear under that menu. Click **Save & New**. Repeat these steps and add menu items for each department.

MENUS AS TEXT SEPERATORS

Some departments' menus will use Third/Fourth Level Menu Items. If a department does not have its own menu structure, it will be created as a *Text Separator* so that Third Level Menu Items can expand below it.

1. In the **Menu Manager** on the *Menu Items* left-side menu, click **New** to create a new menu item. Enter the department name as the **Menu Title** and **Alias**. The **Menu Item Type** is *Text Separator*. Make sure the college is set for the **Menu Location** and the **Parent Item** is set to *Departments*. Click **Save & New**.

2. For each new sub-level menu item, enter the department name as the **Menu Title** and **Alias**. Set **Menu Item Type** as *Single Article*. Set the associated article in **Select Article**. The **Menu Location** is the name of the college and the **Parent Item** is the menu this item should fall under. Click **Save & New** and repeat this for each third and fourth level menu items.

Tip: Third Level Menu Items that have menu items below them should be created as *Text Separators*. The Fourth Level Menu Items will then use that Third Level Menu as the Parent Item.

3. Once you are finished adding all the menus for all of the departments and areas, along with their sub-level menu items, the **Menu Manager** should display something similar to this:


FINISHING THE MENU STRUCTURE

Move through all of the Top Menu and Lower Menu Items on the spreadsheet, creating **Text Separators** for the any Menu Items that have lower levels and **Single Articles** for the rest.
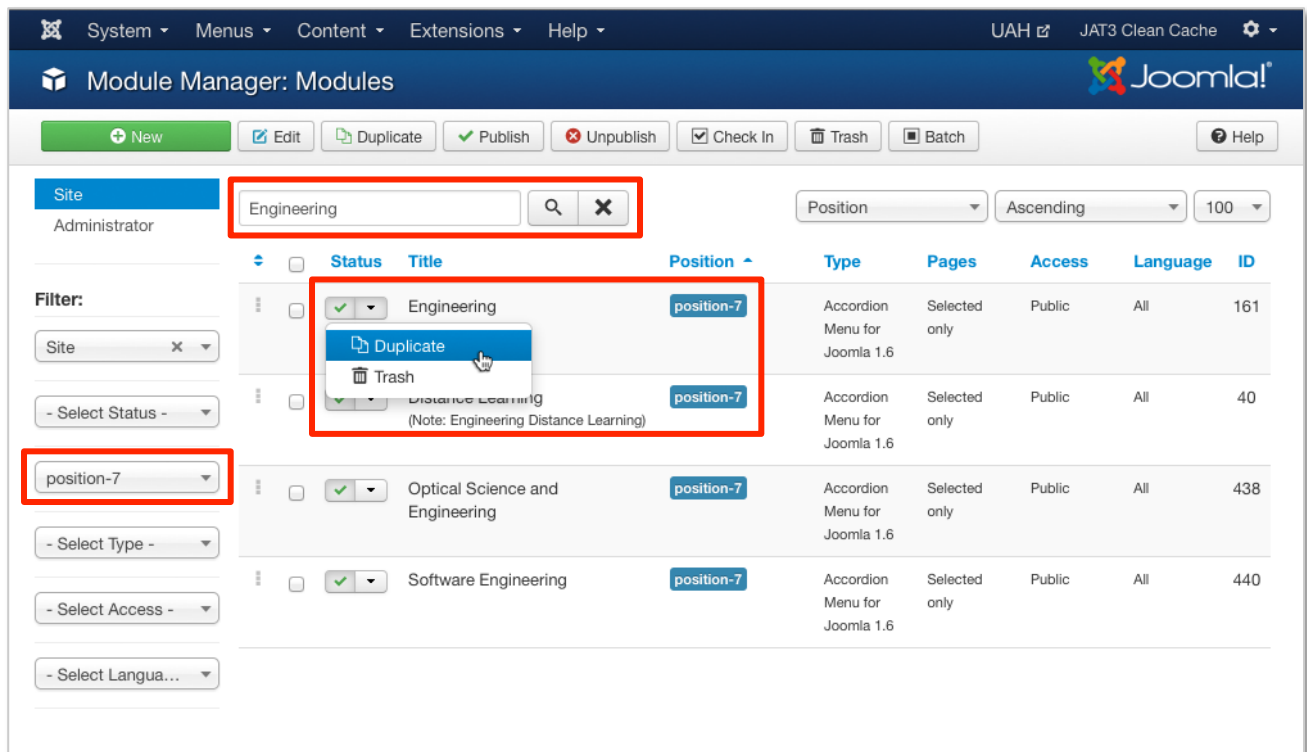
MODULES

Congratulations! You have just created menu items. Now let's add a module for navigation.

1. In the **Extensions** top bar dropdown menu, select the **Module Manager** (or select **Module Manager** from the **Control Panel** left-side menu).
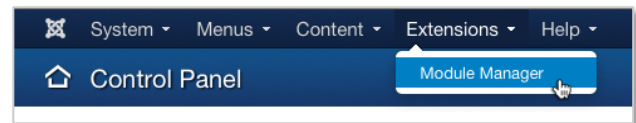
2. In the *Module Manager*, find the **Engineering** module with the position of **position-7**. (*position-7* is the location for left-side menus on a page.) Use the top search field and the left-side **Filter** menus to narrow results to find the *Engineering* module. Click the dropdown arrow to the left of the Title and select **Duplicate** to make a copy of the module. (You can also select the checkbox next to a row and click the **Duplicate** button in the top menu area.)

3. A new *Engineering (2)* module copy will be created. It should appear in the same listing as the original *Engineering* module along with a red X status indicator (meaning the module is not published and active). Click the title to edit the new module.

4. In the module settings, enter the college or department as the **Title**.

   For the **Menu Name**, use the dropdown to select your college/department.

   Change the **Start Level** and **End Level** to reflect the number of the menu levels there will be plus one.
   For example, if there is a Fourth Level Menu Item, the **Start Level** is **1** and **End Level** is **5** (4+1).

   Set the **Status** to **Published**.

5. In the Module Manager edit screen, click the **Menu Assignment** tab (under the *Title*, the second tab next to the *Module* tab) to bring up settings for assigning pages to use the menu module:

6. In the *Menu Assignment* tab, set the **Module Assignment** to **Only on the pages selected**. In the **Menu Selection** area, click **Select: None** to clear all selections. From the list of departments, select the college area and enable each page's checkbox. (Use the right-side **Search** field to find the section. Use the **+** and **–** buttons to collapse listings.) Click **Save & Close**.
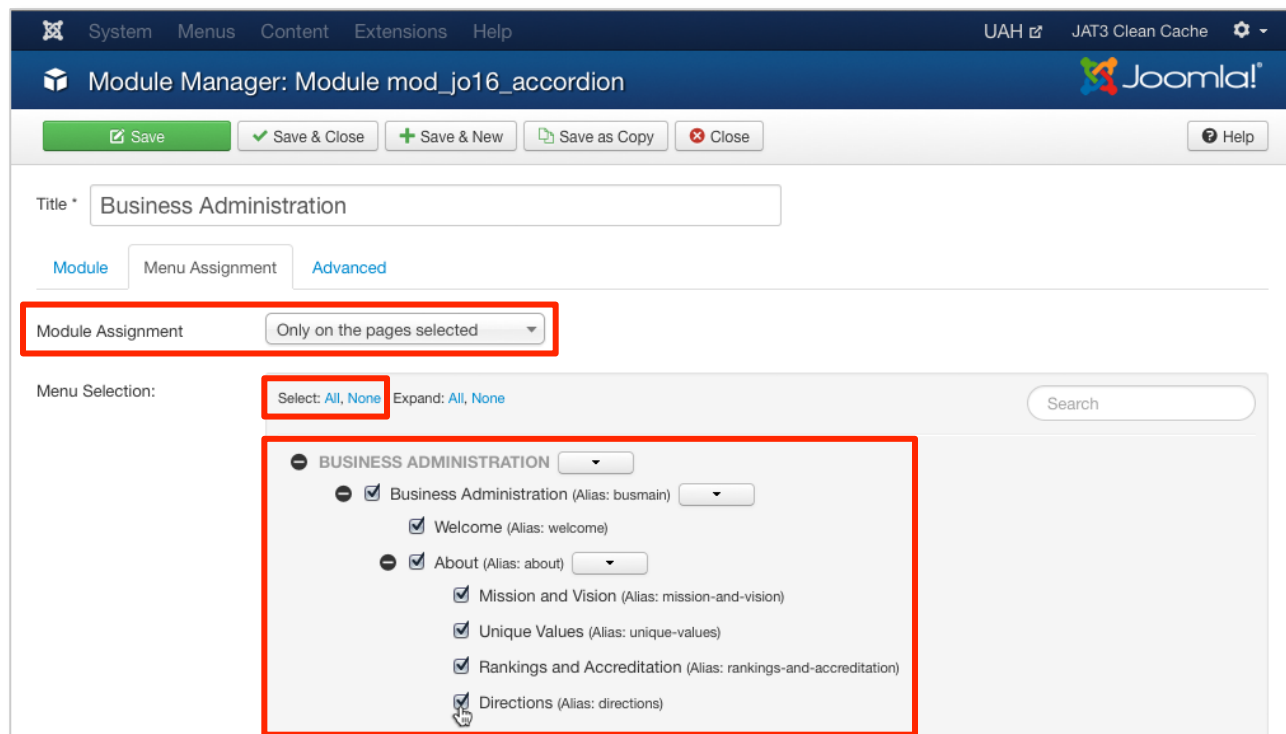

7. After creating menu items and adding them to the navigation module, open a separate browser window/tab to preview the updated page, which should look similar to the example below.
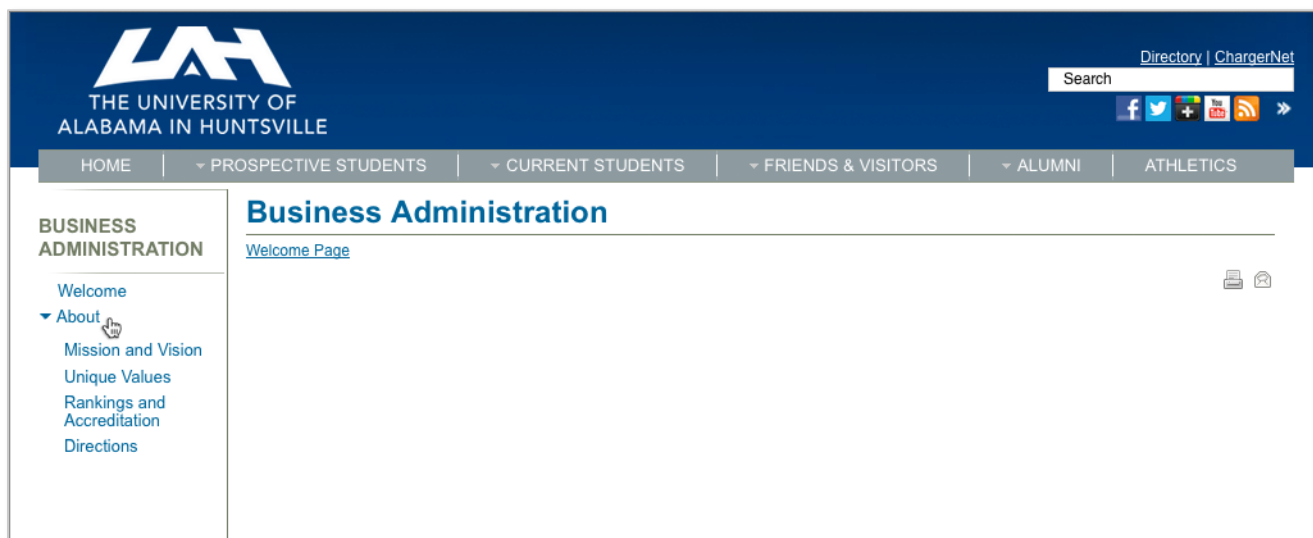
NEWS AND EVENTS MODULE

News and Events are controlled by modules. The *News and Events* articles are assigned to a specific Category, and two modules are combined to display the Articles in that category.

1. In the **Module Manager**, select the *Engineering – News* (with the *eng_news* Position) module. Use the Search/Filter options to find the module. Use the **Duplicate** dropdown to make a copy of the module.
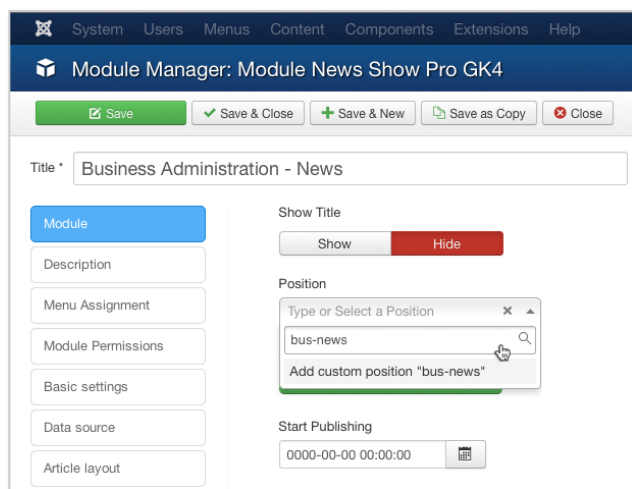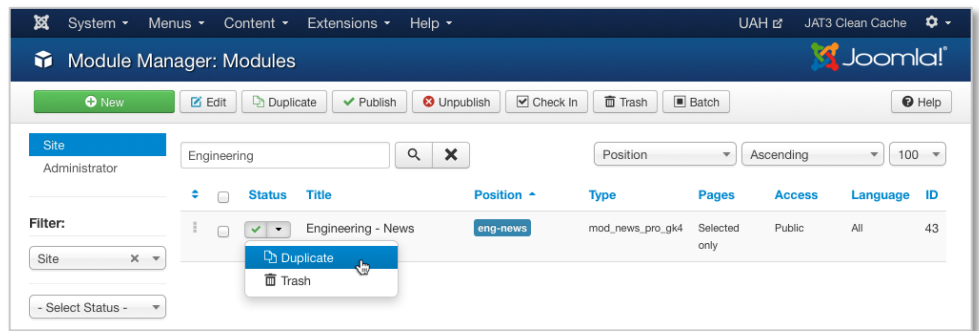
2. Select the duplicate *Engineering - News (2)* module to edit its settings.
3. In the News Module area, change the **Title** to the college name, such as *Business Administration - News*.
4. For **Position**, click the dropdown and type in the new *[your college]-news* position (Example: *bus-news*).
5. Hit Enter/Return to add the new custom position.
6. Change the **Status** to **Published**.

7. Select the **Data Source** from the left-side menu, then select the News category under the college for the **Categories** setting.
8. Click **Save & Close**.
9. Repeat the above steps with *Engineering – Events* module to create the *Events* module for the college/department.
10. Make sure both News and Events modules are **Published**.
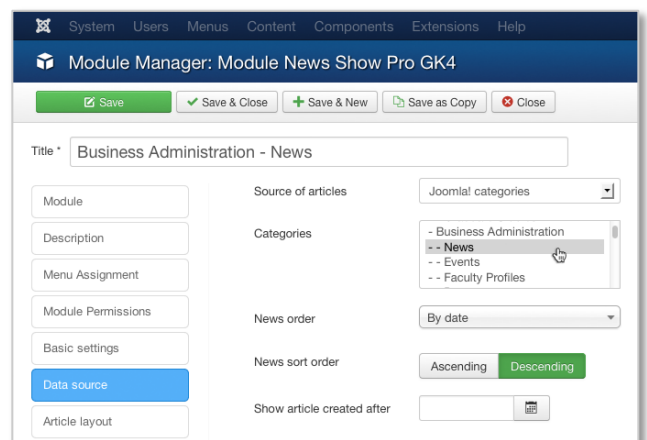
11. In **Module Manager**, select *R_Sidebar_ENG_DEFAULT* (with the *position-5* Position) module. Use the Search/Filter options to find the module. Use the **Duplicate** dropdown to make a copy of the module.
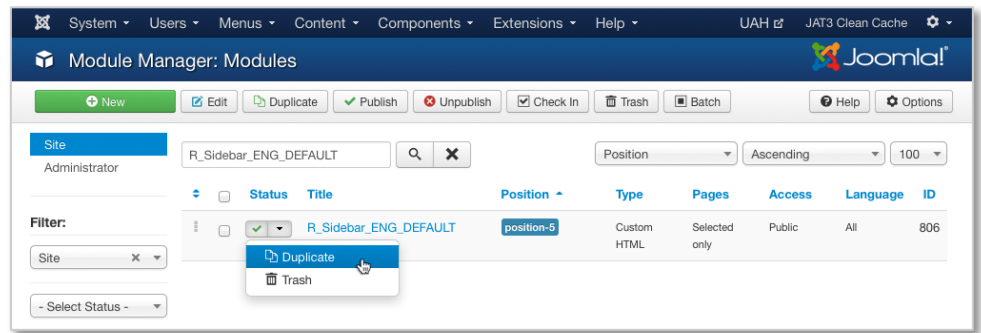
12. Select the duplicate *R_Sidebar_ENG_DEFAULT (2)* module to edit its settings.
13. In the Module area, change the **Title** to *R_Sidebar_[COLLEGE-SHORTNAME]_DEFAULT*, such as *R_Sidebar_BUS_DEFAULT*.
14. In the **Custom HTML** editor, change the name of the *News* and *Events {loadposition [your college]-news}* and *{loadposition [your college]-events}* to the values for the college area. (Example: *{loadposition bus-news}* and *{loadposition bus-events}*)
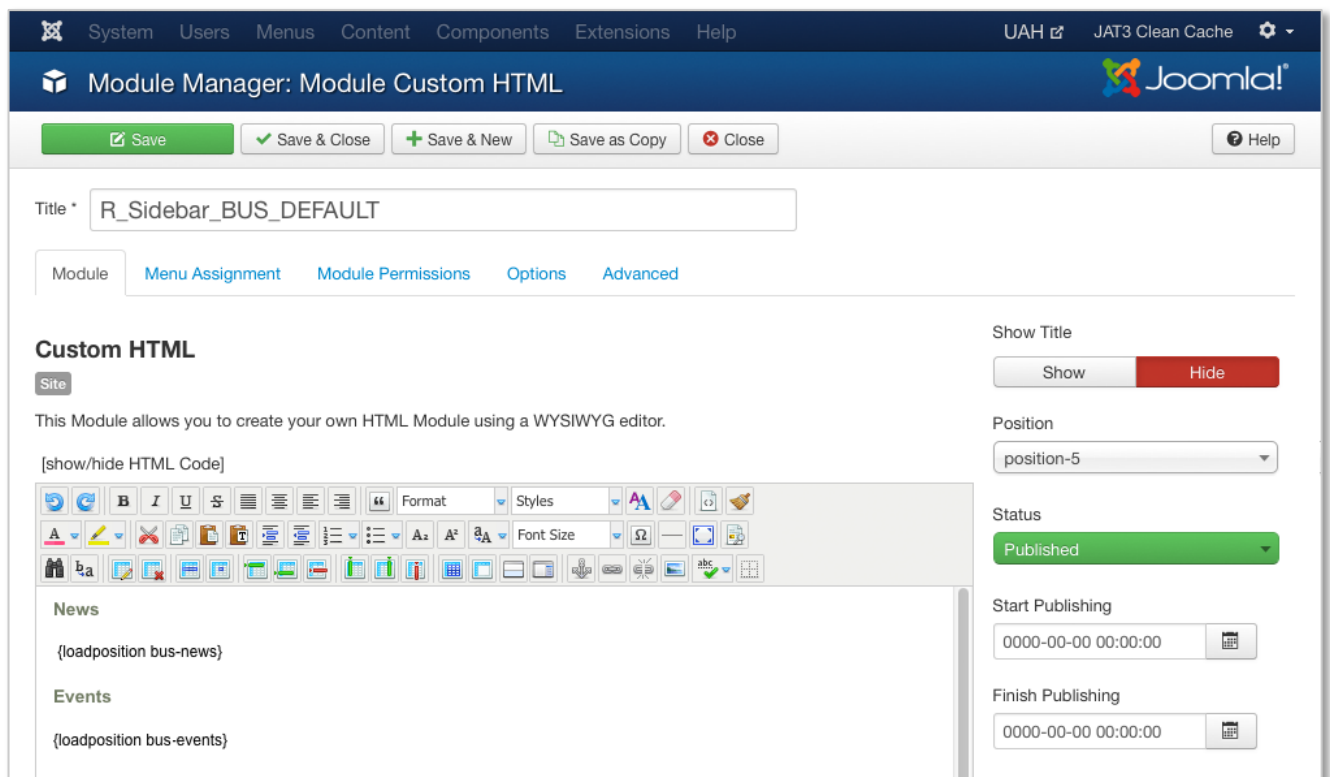
15. Click **Save & Close**.
16. In the **Article Manager**, once Articles are created that are assigned to the News or Events categories for the college/department, they will appear in the right-hand News and Events column on the area's pages.

CREATING AN IMAGE SLIDESHOW

The image slideshow function is a module that is used to display a slideshow on your page.

In the **Article Manager** for the *Welcome* article, enter the text ***{loadposition [your college]-banner}*** above the *Heading 1* Title. (Example: *{loadposition bus-banner}*)
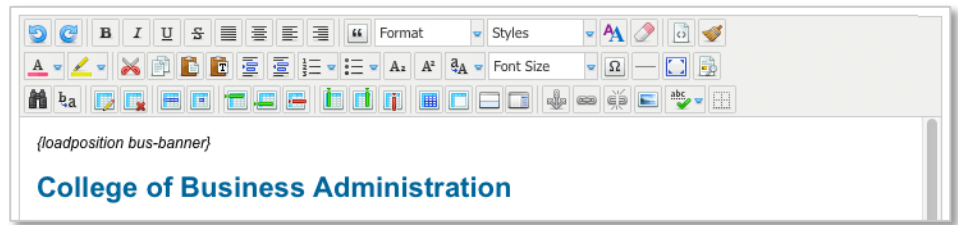
Tip: This *loadposition* code is what is used in the Article to load the slideshow that will be created in the following steps.

1. Use the **Insert/Edit Image** button to upload the images for the slide show to the appropriate department folder.

2. In the **Module Manager**, select the *Engineering Spotlight* (with the *eng_banner* Position) module. Use the Search/Filter options to find the module. Use the **Duplicate** dropdown to make a copy of the module.
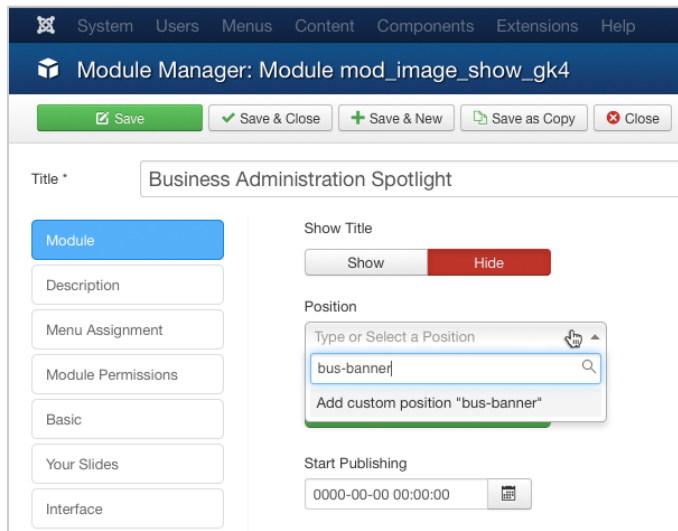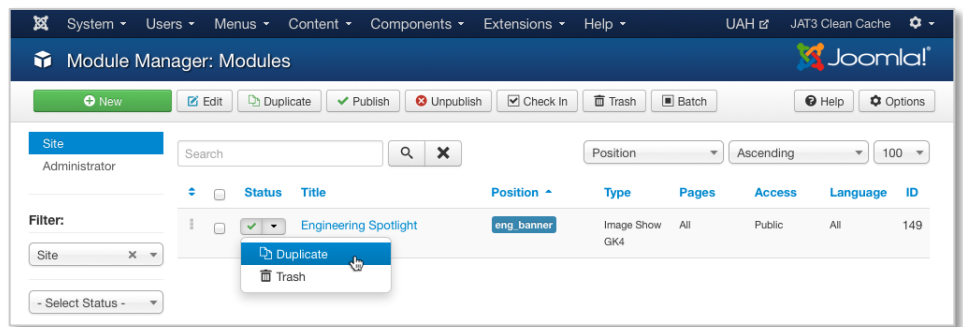
3. Select the duplicate *Engineering Spotlight (2)* module to edit its settings.
4. In the Module area, change the **Title** to the College name, such as *Business Administration Spotlight*.
5. For **Position**, click the drop-down and type in the new *[your college]-banner* position referenced with the *loadposition* code your page (Example: *bus-banner*).
6. Hit Enter/Return to add the new custom position.
7. Change the **Status** to **Published**.

8. After selecting **Your Slides** from the left-side menu, click the Red X buttons (on right slide of title) to delete all of the duplicate Engineering module image slides.
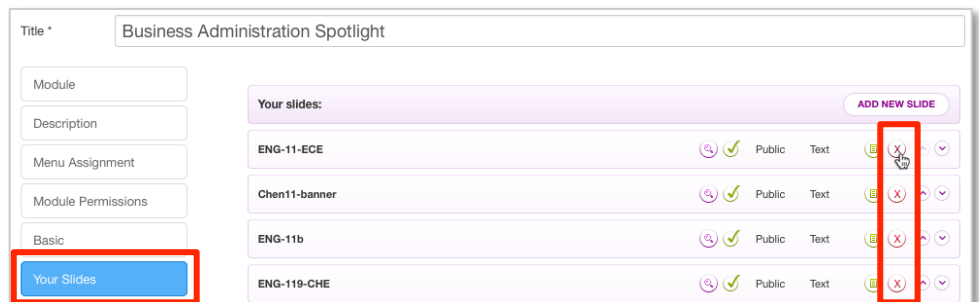
9. Click **ADD NEW SLIDE**.

10. To add an **Image** to the slide, click **Select** to open the image manager pop-up window. Navigate to the college/department images folder using the **Directory** dropdown or by clicking the folder name in the file listing, and then click **Browse…** to select an image to upload for the slide. Click **Start Upload**. Once your image is uploaded, select it in the image manager window and click **Insert**.
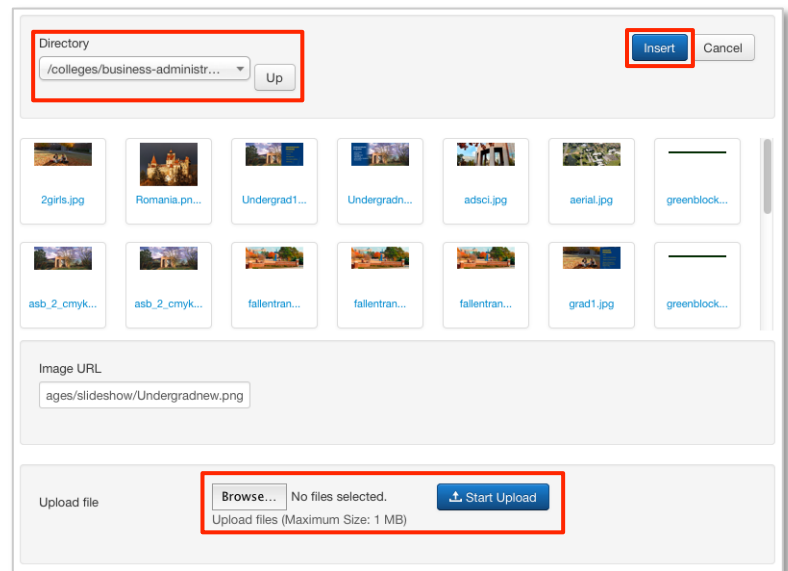
11. For the slide **Title**, enter a descriptive title. (This will not be displayed, but will help identify slides.) To give the image a link to a page, enter the link in the **URL** field. Click the **Save** button at the bottom of the *Your Slides* window. Repeat *Steps 9 and 10* for each of the remaining image slides. When finished adding all the slides, click **Save & Close**.
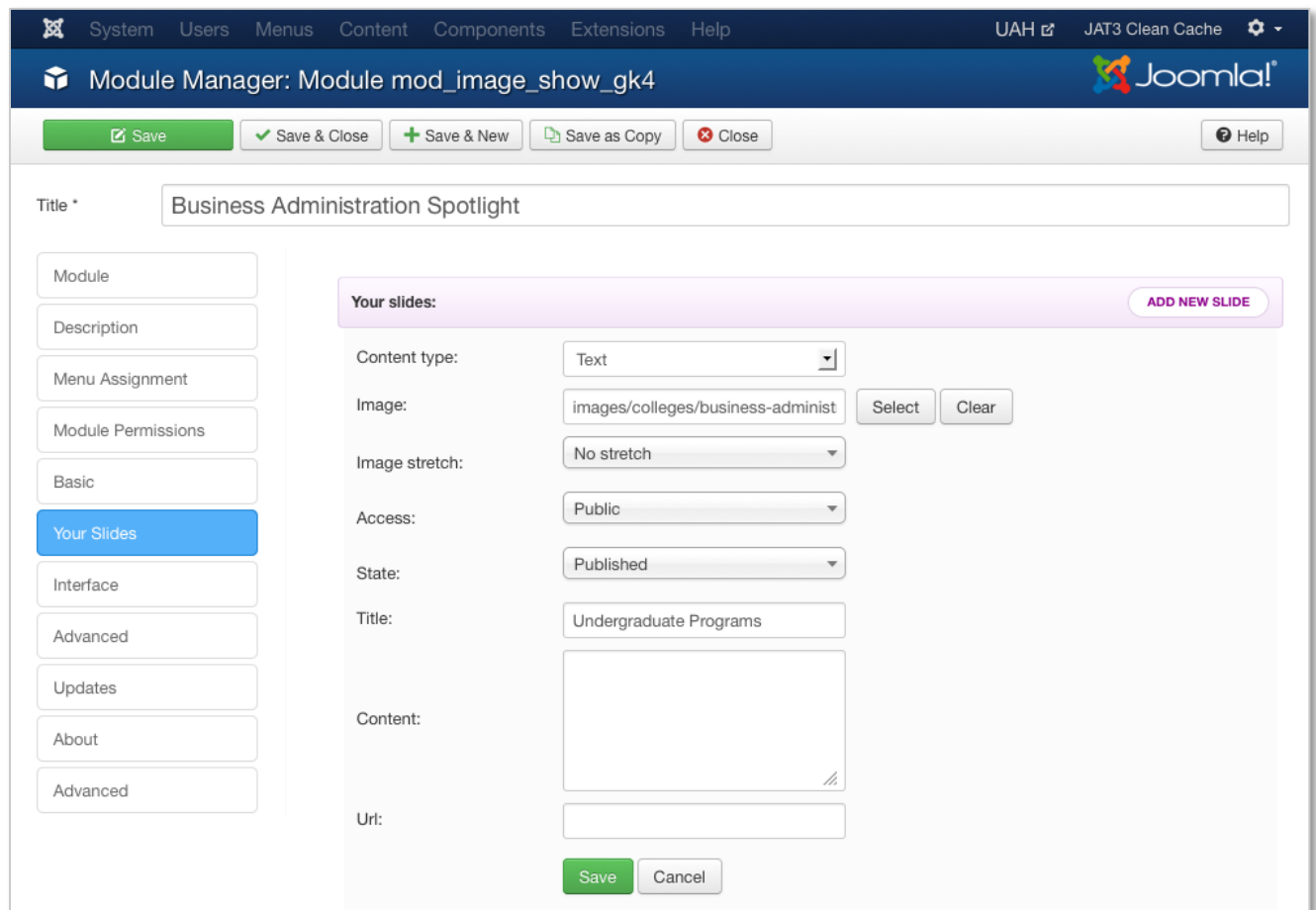
12. Refresh your preview tab/page in your browser to see the updated web page with rotating image slideshow.
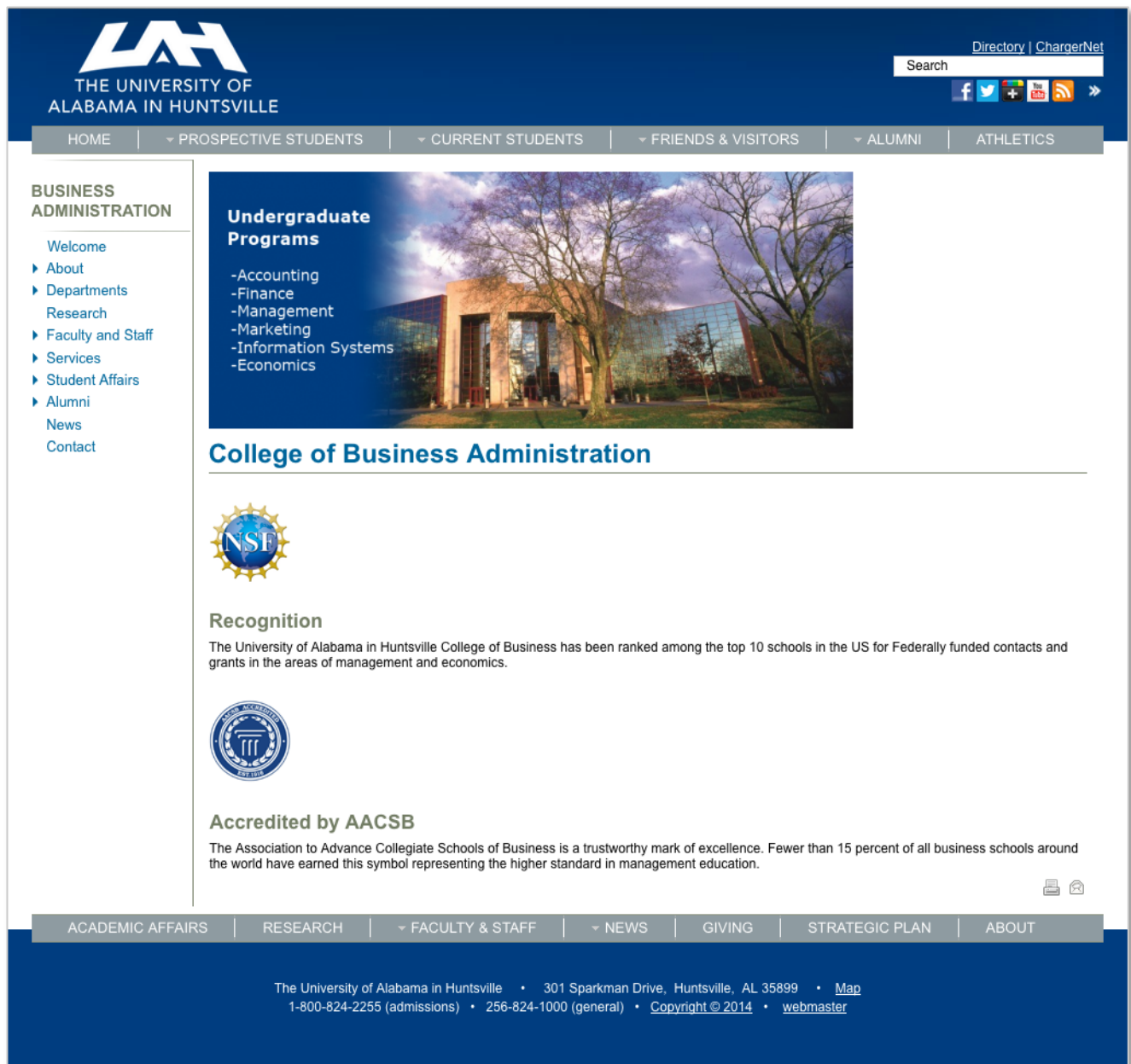
Tip: If black borders show up behind your slideshow images or images are cut off, the image dimensions need to be set. In the spotlight module in the **Module Manager**, in the left-side **Interface** menu, set the image width and height (in pixels) of your images. You can display these values in the images folder on your desktop. Right-click in the folder and click on View Titles. The sizes will be displayed.
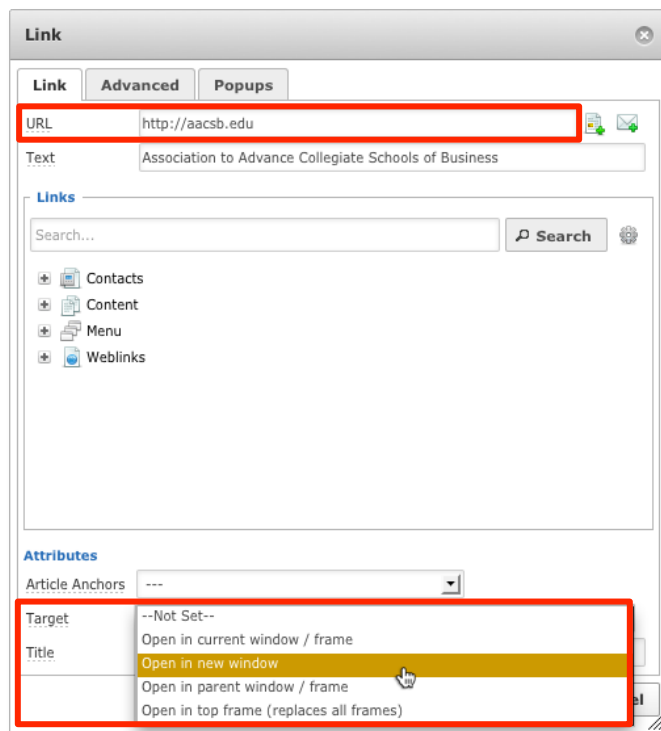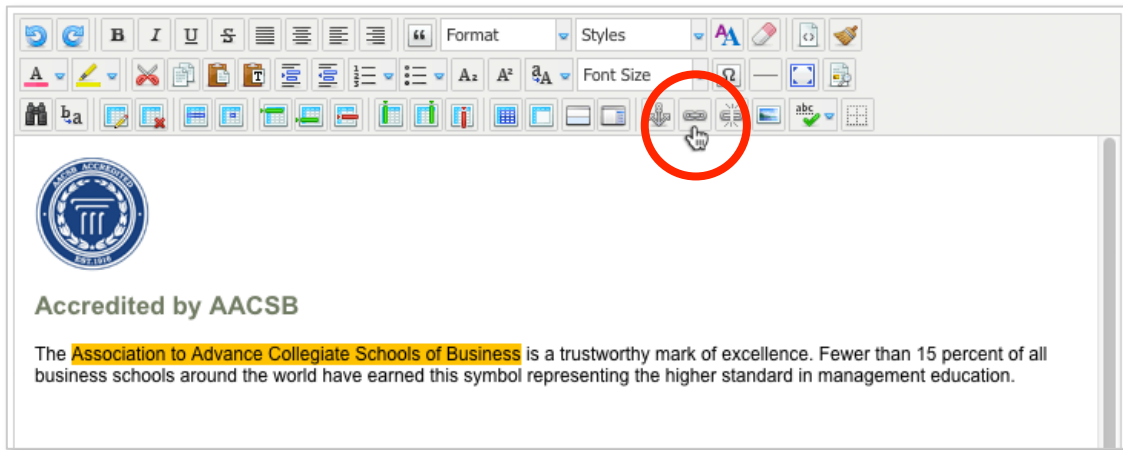
ADDING LINKS

Articles can contain links to other pages, websites, PDFs, and other files. When linking to an external site that is not a part of uah.edu, the link should open in a new browser window.

LINK TO AN EXTERNAL URL

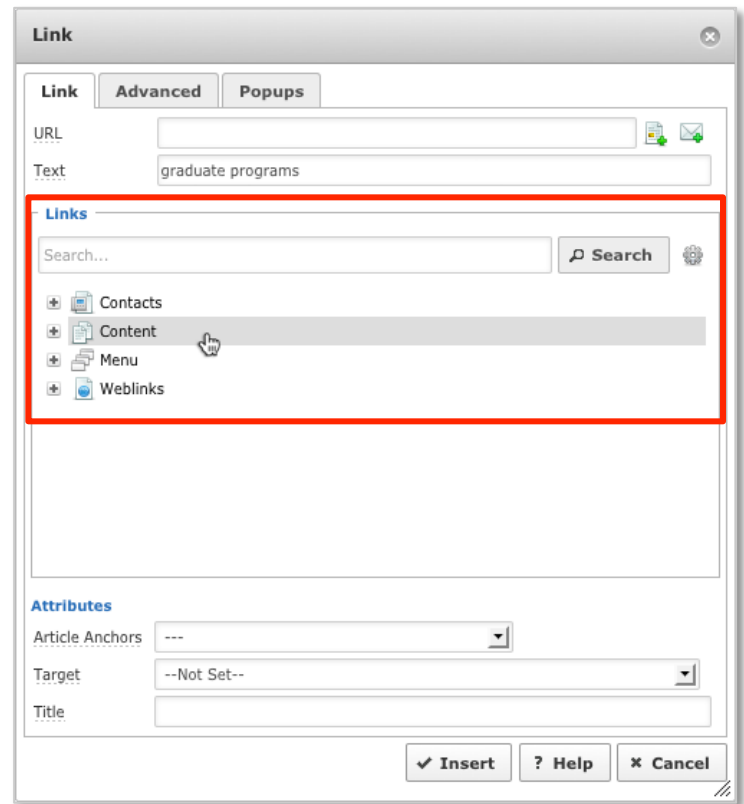In this example, a link to the AACSB website will be added.

1. In the Article editor, highlight the text that you want to be linked and click on the **Insert/Edit Link** toolbar button.

2. In the **Link** pop-up window, enter the **URL** (including *http://*) for the external site being linked to. In the bottom **Attributes** section, set the **Target** dropdown to **Open in new window**. Click **Insert** to update the article editor with the new link.

3. Click **Save** and test your link on your preview page open in a separate browser tab/window.
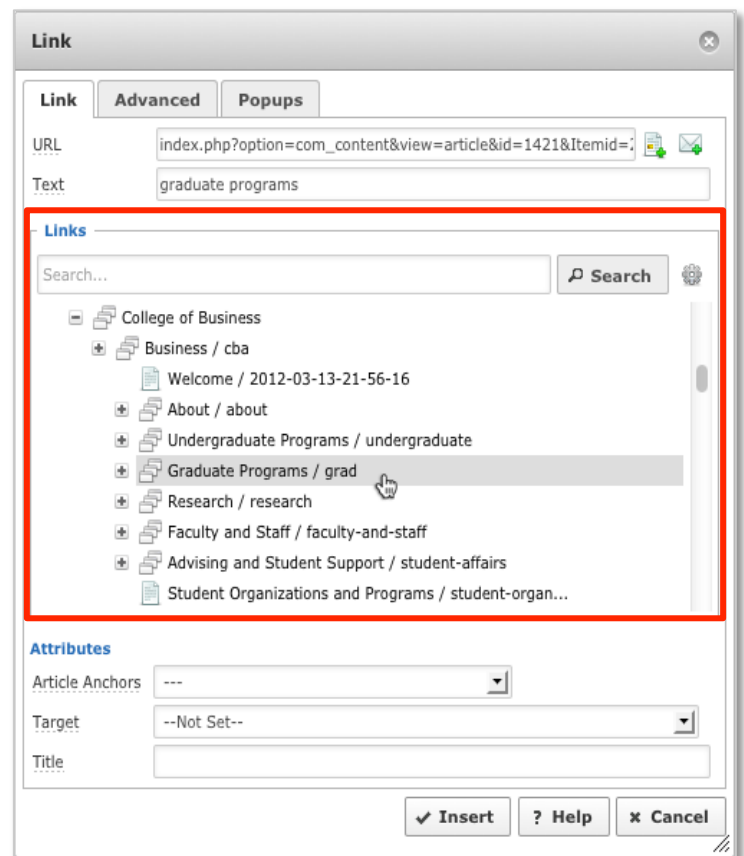
LINK TO AN INTERNAL PAGE

1. In the Article editor, highlight the text to be linked and click on the **Insert/Edit Link** toolbar button.

2. In the **Links** pop-up window, click on the **Content** or **Menu** accordion menus to browse existing site pages or menus to use for linking. Use **Content** to link to an **Article**. Use the **Menu** section to link to a Menu Item.

3. Browse **Content** to link to an Article. (Example: Linking the text *graduate programs* to the *College of Business Graduate Programs* page.)

4. After selecting the article or link, click **Insert**.

5. Click **Save** and test your link on your preview page open in a separate browser tab/window.

LINK TO A FILE

1. In the editor, highlight the text that you want to be linked and click on the **Insert/Edit Link** toolbar button.

2. To the right of the **URL** field, click the **Browse** button to open the **File Browser**.

3. In the **File Browser** pop-up window, navigate the folders and select the file to link to. To upload a new file for linking, select the appropriate folder, and click the **Upload** button.
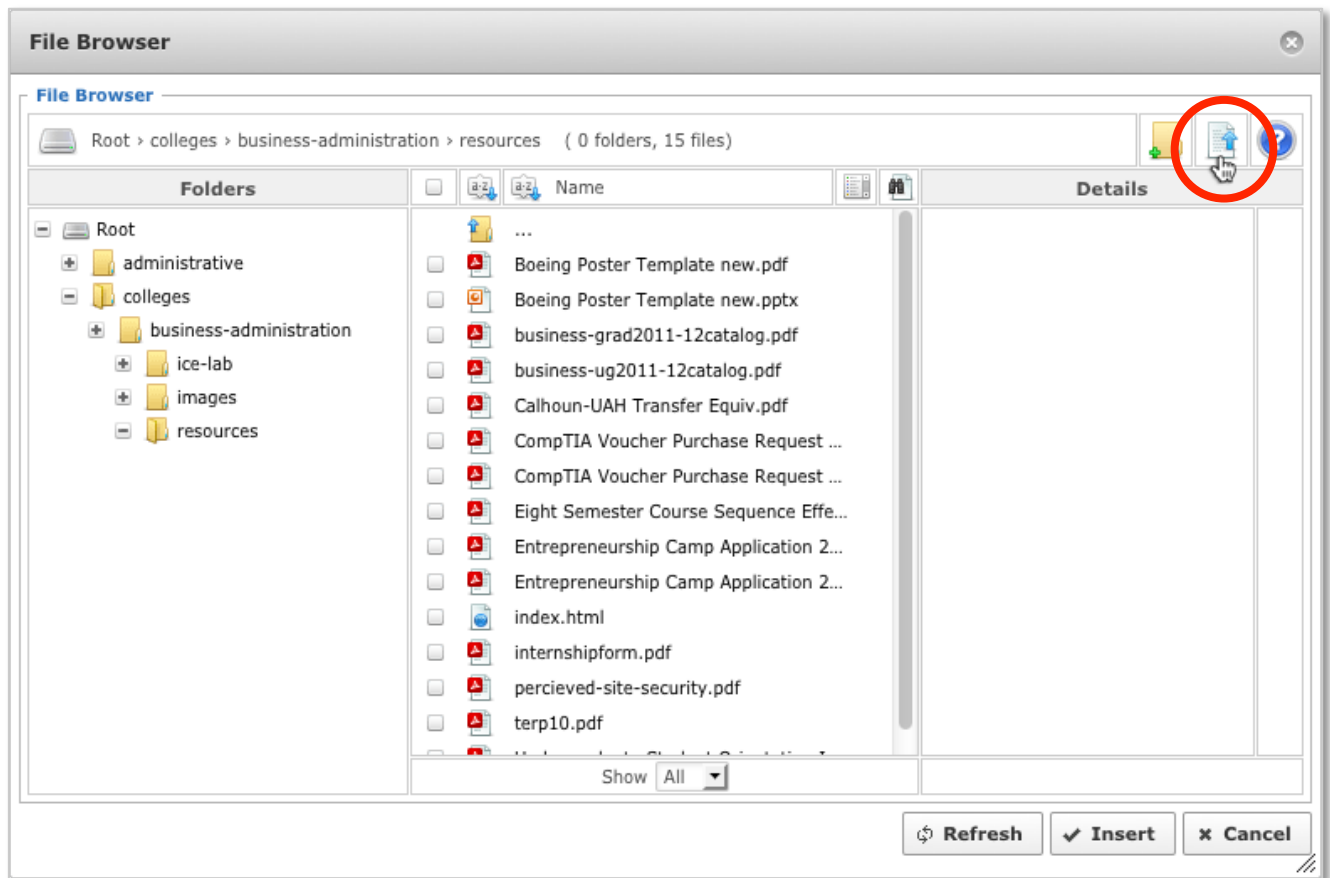
4. In the **Upload** pop-up, use the **Browse** button or drag and drop your file into the window. Click the **Upload** button.
5. With the newly uploaded file selected, click **Insert** in the File Browser window.
6. In the **Link** window, click **Insert** to update the Article editor with the link to the file.
7. Click **Save** and test your link on your preview page open in a separate browser tab/window.

NOTE: File sizes are limited based on file type. If you encounter problems with uploading files, please contact webmaster@uah.edu.

CONGRATULATIONS!

With that you should be able to organize the navigation of your web pages. If you have any other questions about categories, articles, menus, or modules, please contact webmaster@uah.edu.