

the complete beginner's guide to



by taty sena





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... because open source matters



Introduction

Joomla is a great Content Management System with a lot of flexibility **and** with an easy-to-use user interface that a lot of people get intimidated **about** when they realize how many options and configurations are available. This **manual** is meant to serve as a guide to Joomla's basic features and help you install and start your first Joomla website.

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We have all been beginner users at some point, so I hope this guide helps

answer some of the questions you might have.

What is a CMS (Content Management System)?

A Content Management System is a series of programming pages connected to a database that allows one to retrieve information from that database in the form of content. Sounds complicated? You've used one more often that you think.

Have you ever updated your Facebook page or created a blog? Have you ever bought a book from Amazon.com or bid on something on eBay? Have you ever read The New York Times Online or checked something out on Wikipedia? All of these sites work with a type of Content Management System.

The ones we will be focusing on are ones that allow you to manage your own website from a simple interface, to creating your own pages and menus without the need for knowing how to program yourself.

About Joomla

<u>Joomla</u> is a platform based on PHP and MySQL which was created in 2005 by a team of open source developers. It currently has 200,000 community users and contributors. Joomla is free to anyone who wants to download it and use it to create a website. It is also open to anyone who wants to create extensions and templates.

The most current version of Joomla can be downloaded from http://www.joomla.org/download.html



Why Joomla?

There are three main free CMSs available today, and endless other less popular ones. The most popular Content Management Systems available are: <u>Joomla</u>, <u>Drupal</u> and <u>Wordpress</u>.

The differences among them are quite significant, although they are basically meant to do the same thing – to help you create and manage your website. There have been many heated arguments between the Joomla and the Drupal users over which one is best. As someone who has used them both, my take is that they each have their good and bad points.

Joomla

Pros:

- Joomla is usually easier to get up and running and tends to have a quicker learning curve.
- Joomla tends to have better looking templates and a friendlier community, even towards beginner users.

Cons:

- Joomla's code can be messy at times and loading time tends to be longer because of that.
- Its architecture limits how many levels of sub categories can be created.

Drupal

Pros:

- Drupal has a more flexible infrastructure, allowing you to create multiple sub-categories and with more advanced user features.
- Fast loading time and reasonably clean code.

Cons:

- Longer learning curve and usually a longer install to launch time.
- Although the community is supportive, there is less tolerance to new users and people asking very basic questions.

Basically, they are both excellent CMSs and which one you choose should depend on your particular needs and willingness to work through each CMS's individual problems.





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Also pay attention to what modules and themes each CMS has as you may require one that is not on both platforms. It is best to weigh up the pros and cons of each CMS before you go ahead and create your website.

<u>Wordpress</u> is different in many ways. Wordpress truly is built to serve primarily as a blogging platform. It also has a large community and flexibility to evolve beyond a simple blog, but it works best as a delivery medium for always changing material exactly the way blogs are supposed to be. That being said, you can create nice websites using Wordpress that are not blogs.



Installing Joomla

Basic Requirements

There are two ways to install Joomla. Manually and using an installation software such as Fantastico or C-panel, which are installed in the host's server and offer an user friendly interface for the management of the site and the installation of software, but the requirements for both are very similar.

Since Joomla is a database driven system, it requires a <u>SQL database</u> to run. That's where it will install its tables and store information you add to it. Joomla also does better on a relatively fast server, so if you have been on the same server for longer than you can remember, contact your host and check if it's been upgraded and if that's not the case, ask to be moved to a newer server.

Joomla uses a lot of resources and your site will load faster if the server can handle many processes at once. There is also a chance that the technology on older servers won't support Joomla's newest versions. You can view a list of the most current requirements at: http://help.joomla.org/content/view/1938/302/

If you are using Fantastico or C-Panel, check the version of the installer. You want the newest version of Joomla if possible, and at the very least one version behind. New versions usually carry security upgrades as well as bug fixes, and when dealing with a dynamic site, those fixes can make a big difference.

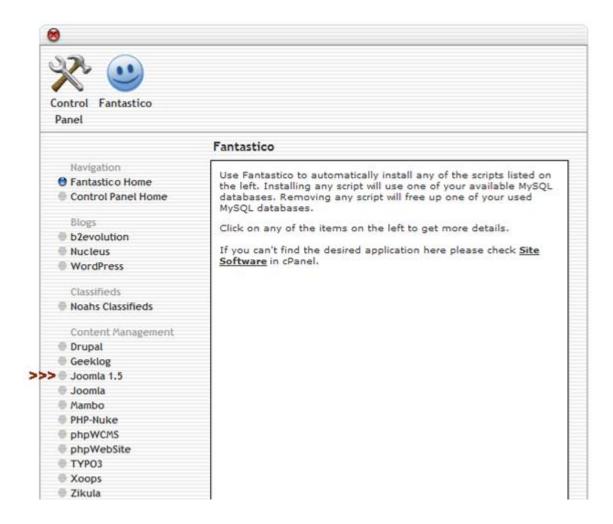
To determine Joomla's latest version, visit the <u>Joomla website</u>.

Installation with C-Panel

So you have checked all the requirements, what now? Well, if you have C-Panel installed on your server, you have your work cut out for you.

Go to C-Panel, look for Fantastico and look under the Content Management section. Check the version of Joomla they have available. You want the 1.5 version at least. If it is a recent version, click "New Installation" (some versions of Fantastico also give you an option to upgrade your installation if you already have one).





You will be asked to fill in the following fields:

- What domain you want to use.
- Install directory (leave it empty if you want it to be in the root folder of your site or create the name of a directory if you want it to be inside a folder within your site).
- Admin username and password, email and full name.
- Site name
- Install user data (check box). This option will install pages, menus and
 directories with Joomla information. If you'd like to see them and change
 them around as a way of learning how to use the site, leave this option.
 Personally, I find this option cumbersome, since you have to go ahead and
 delete all the Joomla pages from your site, so I always uncheck this. Then click
 "Install Joomla".





Joomla 1.5		
Navigation		
Fantastico Home		™
Control Panel Home		m
Blogs		omla!"
b2evolution	la a a au usa a s	an source methors
Nucleus	because of	oen source matters
WordPress	Install Joomla 1.5 (1/3)	
Wordiness	21131211 30011111 213 (27 37	
Classifieds	Installation location	
Noahs Classifieds	2000	
	Install on domain	.
Content Management	Install in directory	
Drupal	an or manifestation of the con-	
Geeklog	Leave empty to install in the root di	irectory of the domain (access
O Joomla 1.5	example: http://domain/). Enter only the directory name to ins	tall in a directory (for
- Joomla	http://domain/name/ enter name	
Mambo	NOT exist, it will be automatically cr	eated!
PHP-Nuke		
phpWCMS	Admin access data	
phpWebSite	Administrator-username (you need	
TYPO3	this to enter the protected admin	
Xoops	Password (you need this to enter	
Zikula	the protected admin area)	
Customer Relationship		
Crafty Syntax Live Help	Base configuration	
Help Center Live	Admin e-mail (your email address)	
osTicket		
PerlDesk	Admin full name	
PHP Support Tickets	111 111 1	
Support Services Manager	Site name	
Discussion Boards	Install Sample Data?	V
phpBB		
● SMF	Install Joor	nla 1.5
- W. W.	mstan 300i	ind 1.0

Just give it a few minutes and C-Panel will create the database and install Joomla for you. It will then give you a link to your installation and to your administration, which is where you go to create articles and configure your site.



Manual Installation

Now what do you do if your server does not provide you with C-Panel? Don't worry, there are a few more steps, but it's still not a long process.

You will need a database, an FTP program and Joomla Installation files.

Step 1 – The Database

Most hosts nowadays, allow you to create databases using their administration. You won't have to know how to deal with the database once it's created. All you need is the:

- Database Name
- Database ID
- Database Password
- Database Path (or address)

Once you create the database, you should have access to all that information. Keep it safe, since Joomla will ask you for it during the installation.

Step 2 – Downloading Joomla Files

Once you have the database set up, you need the Joomla Installation files. You can get the most updated files from: http://www.joomla.org/download.html

Download them to your computer as a zip file and extract them to your website folder. Now, you have two options here. If you want Joomla to be your whole site, or the main part of your site, you should put it on the root folder, which is the main folder for your site.

If instead, you already have a site and you only want Joomla to be part of that site, in a subfolder such as: http://mysite.com/joomla, then you should create that folder and extract all of the files to that folder instead.

Step 3 – Uploading Joomla Files

Next, you should upload all of the Joomla files to your host using an FTP program, or extract the zip file directly to your server through the server's file manager.



Step 4 – Running the Installation

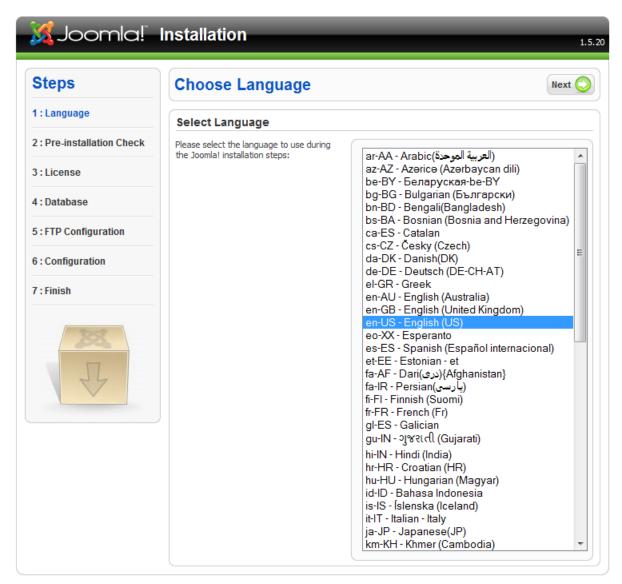
Once that is done, go to (if you uploaded Joomla to the root folder):

http://yoursite.com/index.php

Or if you uploaded it to a sub-folder, go to:

http://yoursite.com/JoomlaFolder/index.php

From that point on, follow the install wizard.



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It will ask you for a language, and then it will check whether your server can handle Joomla without any problems.

On some specific hosts, Joomla's folders might not default to their correct permission







settings, which would cause it to display an error saying 'Access is not allowed'. In that case, you might have to access those folders and change the permissions by hand.

Some hosts provide an interface on their administration that allows you to do that, otherwise, check the permission instructions on the FTP program you are using. When changing permissions, you must be very careful, because if you change the wrong folders, your site may be wide open to hackers.

There are many discussions about which security setting should be used with Joomla. The basic permission settings are:

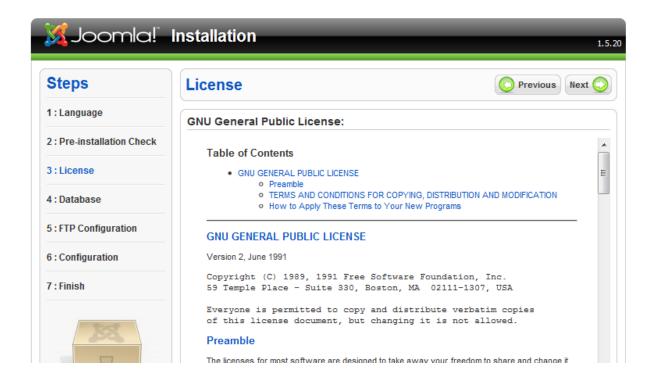
644	755
Owner has Read and Write	Owner has Read, Write and Execute
Group has Read only	Group has Read and Execute
Other has Read only	Other has Read and Execute
757	777 (least secure)
Owner has Read, Write and Execute	Owner has Read, Write and Execute
Group has Read and Execute	Group has Read, write and Execute
Other has Read, Write and Execute	Other has Read, Write and Execute

Use the most secure setting for all non-public files whenever possible and when it doesn't affect installations and usage of Joomla.

Step 5 - License

Next, read over Joomla's license, it is pretty straightforward.

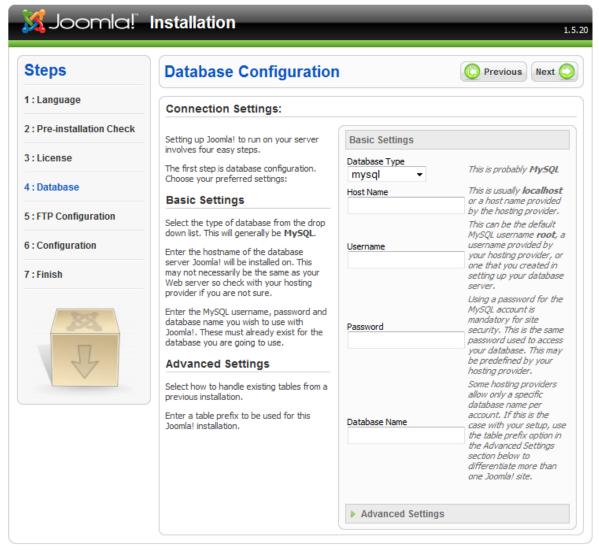




Step 6 – Database Information

The following page is where you will need your database information.





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Select:

- The type of database (mysql is the most common)
- Hostname (the address or path to your database)
- Username and password (for the database)
- Database name (you probably chose that when creating the database)

Note: Depending on your host, you might not have been given a choice to select your options for the database creation. In that case, try hostname "localhost" and username and password provided by your hosting company.

If you are installing on a localhost using WAMP or XAMPP, the Username is usually "root" and the password is nothing/blank.

Unless you know what you are doing or have received an error during the installation, don't bother looking at the advanced settings.

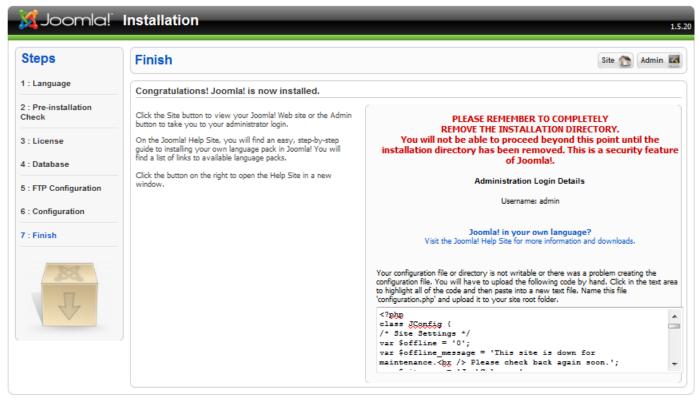




Continue through the configuration. You will be asked to add basic information such as email and site name, and be given an option to install "Sample Data". As I explained on the C-panel install, this option will install pages, menus and directories with Joomla information.

If you'd like to see them and change them around as a way of learning how to use the site, leave this option. I usually don't like having all those pages installed on my sites, because I have to delete them later.

If you continue with the prompts, you should now have a "Congratulations" page.



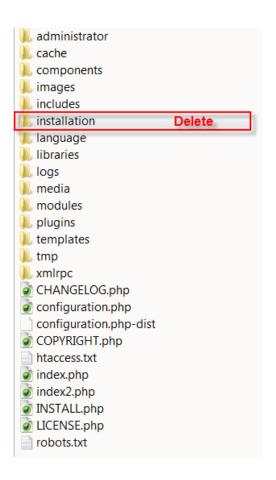
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All you need to do now to start using your Joomla site is to go back to FTP and delete the "Installation" directory. Having this directory still on the site is a major security issue.

You are now ready to start adding content to your website through the Joomla interface.









Configuration Settings

Once Joomla is installed, it's time to start adding content and managing your site. You will need to log into the administration of the site. The default administration can be found at: http://(your site and folder where Joomla is installed)/administrator. You will need the username and password you set up during installation to log in and access the backend of your site.



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User Manager

The user manager allows you to create new users by clicking the "new" button and to edit existing users. You can also use this interface to define what permission group they belong to, which defines what they can and can't do on the site.





For example, "super administrators" have full control of the site; meanwhile, registered users can access parts of the front end of the site that require a log in, but not much else.

Global Configuration

There are three tags under Global Configuration, and your choices here affect the whole site. They are:

Site

You can take the site offline (so no one can see it while you work on it). It will say the site is down for maintenance.



You also have an option to change the site name and to choose a default WYSIWYG editor (Watch You See Is What You Get), which is the interface for you to create your articles, make fonts, bold, create tables, etc. The default is TinyMCE. You can install others if you like. Joomla has a large selection of extensions available for download, but more on that later.

List length determines how long the lists of articles on the backend of your site will be by default, before Joomla displays a "next page".





Feed length and feed email determine the length and email for the RSS feed on your site.

Global Site Meta Description and keywords is the description that Google and other search engines will pick up as being the general site description and keywords.

SEO settings

Search Engine friendly URLs will modify the address of your pages from something that looks like this:

http://yoursite.com/index.php?option=com_mtree&task=listcats&cat_id=1922&Itemi d=35

to something that looks like this:

http://yoursite.com/about-us/contact

or

http://yoursite.com/index.php/about-us/contact.html

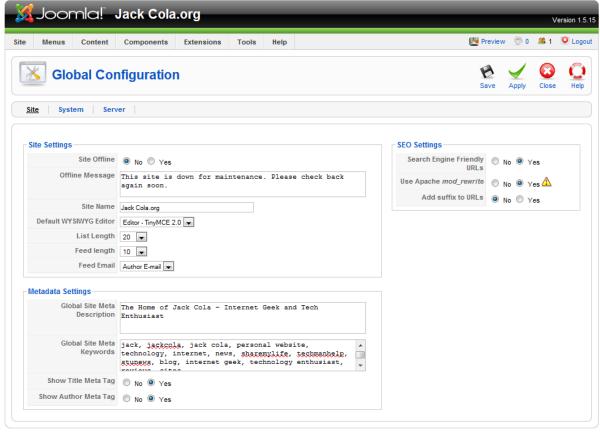
If you choose to add a suffix to the URL (that's the .html part)

That will only work in some hosts if you use an Apache mod_rewrite, hence that option. The best way to find out is just to try without it, and if you have problems, change that option to yes.

You can even have it so there is no index.php in the URL.





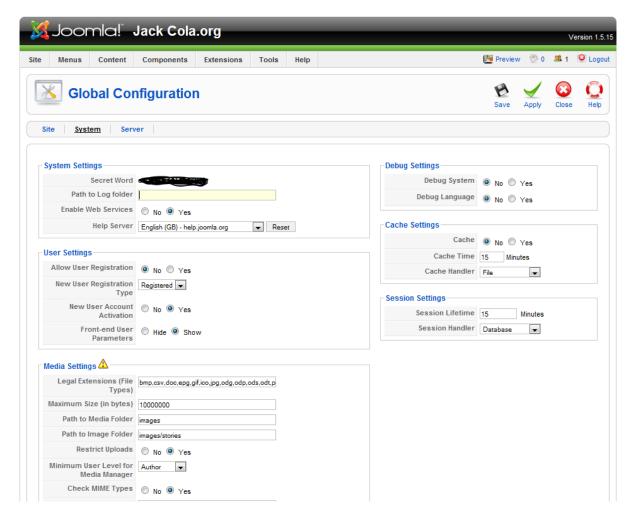


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System

Under the system settings you will see several options you might want to consider modifying, which control whether users can register on your site and what kind of privileges they can have. Some of the most important features are:





User settings:

Allow user registration (yes, no) – Determines whether people are allowed to register as site users or not. If you select yes, you can determine what level of access the new users will have when they sign up. The options are:

New user registration type:

- **Registered** Can't edit or publish any articles. The user is simply a registered user of the site with no privileges.
 - **Author** Can create content and determine where it should go and some minor settings relating to their individual articles.
- **Editor** Has the same ability as the above users, but they can also edit articles by other users.
- **Publisher** Can do all of the above, plus the ability to choose whether an article will be published or not.

(Detailed information can be found at: http://docs.joomla.org/)







New User account activation (yes, no) - Determines whether the site requires that they respond to an activation email.

Path to media folder - if you decide to change where the media manager files are stored you can put the new URL here.

Path to image folder - if you decide to change where your photos are stored you can put the new URL here.

Minimum User Level for Media Manager (author) – Allows you to decide which kinds of users can have access to your media manager, which would allow them to upload pictures, delete them and move them. Author is the default choice, since they might need access to upload images to articles they create.

Most of the other ones you should only change if you know what they do.

Server

Most options will already be set for you during installation. The options you must change are:

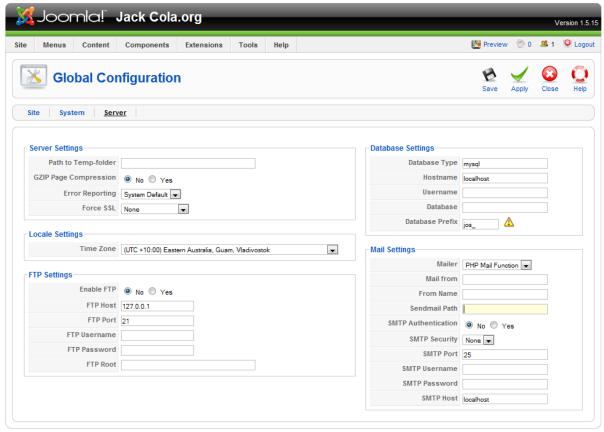
Under mail settings:

Mail from - the email you want to use when sending messages from your Joomla site

From name:

The sender name you want the receivers to see on the emails you send using your Joomla site.





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Tools

Most of the tools under this button can be used for general management maintenance of the site and communication among users. You can send private messages to users or mass messages to all of them.

When another user is editing a file, a little padlock prevents others from editing it at the same time, and "checks it out" for the time being. The Global Check In basically makes everything that was checked out available for editing by checking them in again.

Some mods cache some of the information for speed's sake. You can clear that cache if you need to by using the "Clean Cache Admin" and the "Purge Cache Admin".



How To Publish Content

The Joomla architecture requires that every article belong to a section and a category (unless you make it unspecified). Because of that, before you start creating the sections and categories, you need to think of the names that you might need. Think of a section as being a like a drawer in a filing cabinet, a category is the folder inside and articles as the documents inside the folder.

Another good rule of thumb is to think of the sections and categories as one thinks of the menus and pull down menus. Let's say you want to have a button called "About my company", and when someone puts the mouse over that button, a pull down menu with the options "Staff" and "Locations" appears.

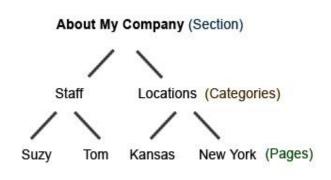
That is a good guideline to creating your sections and categories. Make "about my company" a section and "Staff" and "Locations" the categories. They you can create one page for each person in the staff and place it inside the "Staff" Category and all different locations your business has on their own page with map, contact and information, and place each of those pages inside the "Locations" category. That way you can keep your site organized for when you are ready to create the menus.

Sections

So to create a section, simply go to the "Content" menu button and select "Sections". Once on the page, click the "New" button. You will be taken to a page with several options. The only one you really need is the Title, and a Description if you want to link a menu button to that section at some point, otherwise, just the title would be enough.

Categories

From the content menu, you can also get to categories. Since they are subcategories of sections, they work in a similar way, and you should also add a Title, but this time you must also select a section for the category. All the other fields are optional and not necessary for the functioning of the site.







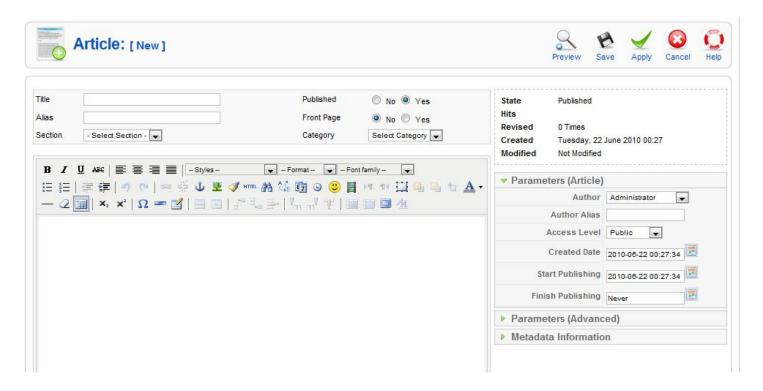
Articles

Now that you have your sections and categories created, we can start adding some real content to the site. To create an article, go to "Content", articles and click "New".

You will be taken to a page that looks a little like Microsoft Word, but without as many features. It is what we call a WYSIWYG (What You See Is What You Get) interface. What that means is that whatever you do on this page will be translated by the software into HTML which can be read by web browsers as a webpage.

Start by adding the title. The alias is not necessary. You must then select a section and the category (which is why you had to create them first). You can then add the text and images in either view, the standard WYSIWYG viewer or directly to the HMTL (by clicking the little HTML icon). You can also add SEO (Search Engine Optimization) information by clicking on the Meta Tags option on the right hand side.

One other button worth mentioning is the "Read more" button. You would use this button if you want people to read a short preview of the article and have to click on the read more link on the article to read the whole thing. Basically, just select where you want the preview to end, click on it and then click on the "Read more" button.



It will add some code to the article to create the "Read more" button. It is particularly useful if you are using a blog display (more on that later) and don't want a list of complete articles to display on the same page.







You will also notice that there are several advanced parameters you can modify such whether you want to display the name of the author or whether you want to display the default PDF, print and email icons that usually appear on the upper right hand side of Joomla articles.

Media Manager

The media manager is your tool to organizing your images. One important thing to know about the media manager is where to put your files. By default, it comes with a few images (such as fruit and food). Those images can be accessed from the articles interface to be added to the articles, but only the folders and images placed inside the "Stories" folder can be accessed that way.

You can still link to the other images, but you must find their address by hand and type it in, so for ease of use, I suggest you place all of the images you will be placing on the pages of your site in organized folders inside the "Stories" folder.

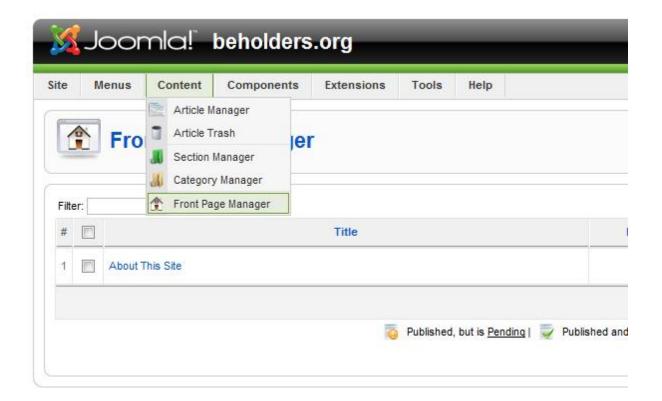
Another thing to know is that the Media Manager does not re-size images, so if you are uploading huge images, they will distort your website once you place them on the website, and even if you change the image size by hand on the code within Joomla, those images will still take a long time to load and significantly slow your site down. So re-size and compress them with image software in your computer before uploading them to the Media Manager.

Front Page Manager

The Front Page Manager is the manager that let' you choose the order and particular features of the articles you have selected to appear on the home page (Front page) of your site. It can be reached from the "Content" menu. It's the place where you can manage the options for the articles you chose to have on the front page of your site.

One of the most useful features is the possibility of re-ordering them (which is a feature also available in sections, categories and articles). To do that, go to the front page manager, and look at the list of articles listed there. You will see a column called "order". Change the numbers around to the order in which you would like them to appear on the page, then click the little save icon on that column, right next to the "order" title.





Menus

Now that you have created the sections, categories and articles, it is time to create the menus for your site. You can create several different menus and submenus using the "Menu >Menu Manager".

The most common one is the basic "Main Menu", which is created by default and can also be found under the "Menu" button. There are endless choices with the menus. You can link them to sections, categories, single articles, external sites, components, wrappers, and many more.

The one you will probably be using the most is the "Articles" menu. It allows you to link to Articles, Categories or Sections, and also to configure how you want them displayed.









For example, I want to create a menu link that will point to a category in my site called "Sports". I also want all my articles to appear in a blog format, with the beginning of the articles, followed by a "read more" button and displayed in 2 columns. From the new menu options I select "Articles>Category Blog Layout".

Once you get comfortable with using Joomla and start expanding your site with components, you will get more menu types to choose from.



How to Design and Customize Your Site

There are many features such as social bookmarks, modules connecting to mailing lists, calendars, photo albums, and an endless amount of other features that can be added to your Joomla site.

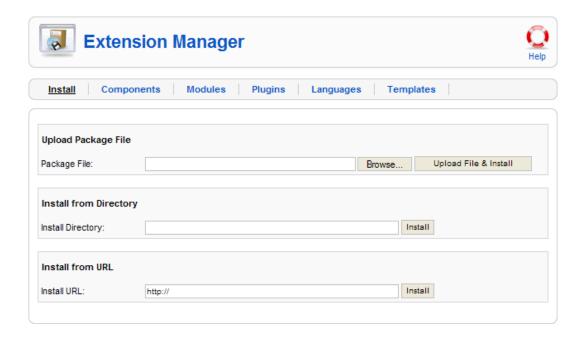
They are actually one of the main advantages of having a dynamic site. You can script in many changes and features into your site, but if you have no intentions of learning how to script for Joomla, there are already over 5000 plugins, modules, templates and components available for download from http://extensions.joomla.org/, a huge percentage of which will be absolutely free.

After you have downloaded them, check the particular instructions to see if there

are any instructions out of the ordinary. If there aren't you can get them to your site by following the instructions below.

To install any of the features described below, all you do is go to the "Extensions" button and select "Install/Uninstall". You will be taken to a page that allows you to search for the file on your computer or upload the file from a URL. That file is usually a zipped file, and it should not have been extracted.

Once you found the file, click on "Upload and Install". After a few moments you should get a message saying it has installed successfully. From that point, you can go to the Modules, plugins, components or template manager to enable them.







People tend to get a bit confused about the differences between plugins and modules, and about what components actually do. So let me try to clear up some of the misunderstandings.

(You can find some of the free extensions I describe below at: http://www.makeuseof.com/tag/10-free-joomla-extensions-live/)

Plugins

Plugins are features that can be added to Joomla, which will appear within the articles themselves, or that relate to interfacing with the articles. For example, I love having options for people to share the articles on my Joomla sites and to bookmark them. This is something that should be added to each individual article so that it works properly, but I don't want to have to add it to each page by hand.

That's where the plugins come into play. I searched the Joomla extensions site for social bookmarks and found several plugins that added that feature to my site. After installing one, and enabling it, now, when I write an article, the links to the social networks automatically appear on each page.

Modules

Modules can be recognized as being those side boxes on dynamic websites. The difference between plugins and modules is that modules appear almost as side menus and shortcuts around the articles.

For example, if you want to have a module that people can use to sign up for your newsletter directly from your page, you can download a module, or create one that allows people to do that. Then it's a matter of deciding where you want that module to go.

Each template has its particular slots that are created to hold modules. The most common ones are: Left bar, Right bar, Footer and Header. Most have many sub slots you can use, where they divide those main areas into smaller parts. For example, some templates have a user 1, user2, and user 3 on the bottom of the page. That means you have 3 small columns on top of the footer so you can add several modules on the bottom of your site.

Now, I mentioned you could download modules and also create modules, so how do you create one?

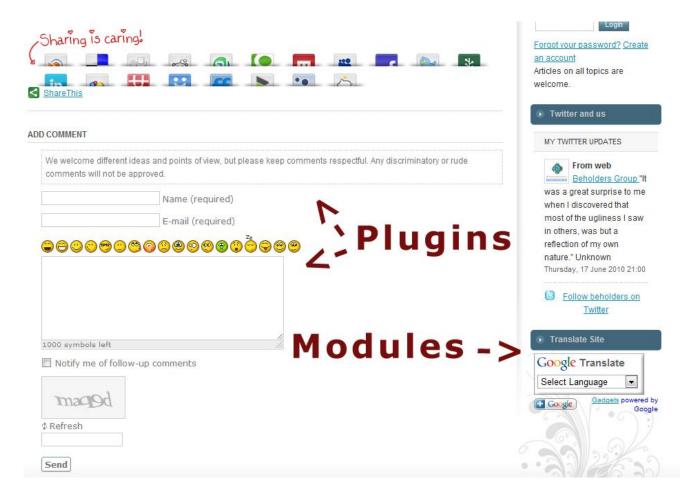




Under the "Extensions" button, select Modules. Then click "New". You will be given a large list of options to use. Some of them are modules of components you might have installed already, and some are default Joomla components. A few of those are very flexible modules, such as the HTML option.

Basically it works like any other HMTL page. Whatever you want to add to it as far as text, links, or anything else that can be added to HTML, you can add it there.

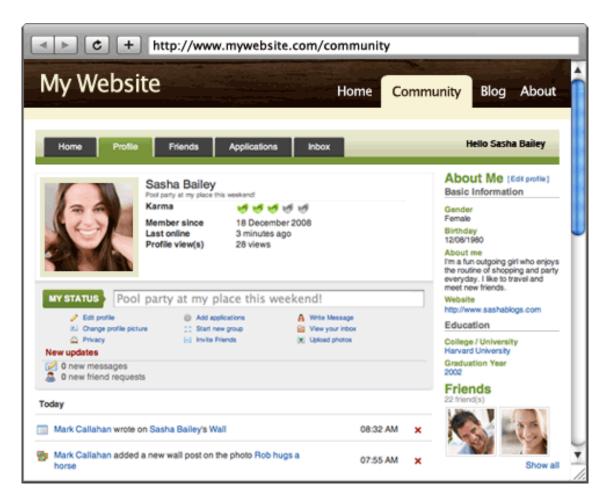
Once you have created the module, you must decide where you want it to go. You will find a pull down of positions on the upper left hand side of your screen. Select the position, make sure the module is enabled and save. You should now see it on your pages. If it is in a position you don't like or you don't see it, just return to your modules manager and select a different position.





Components

Components work as added features to your Joomla site. They are more complex additions than plugins or modules because they usually bring various features with them. Some famous components include JomSocial (not free), which creates a full social network within your Joomla site, or Acajoom, which is a powerful email list component.



Even though the installation follows the same process as the other extensions, because they are more complex, they usually require that several modules are enabled or that you configure the component, so follow the creator's instructions.

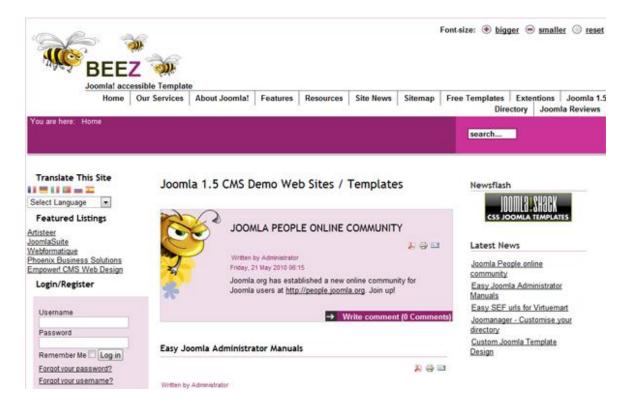
Templates

Anyone who opens the first page of their Joomla site will understand why the templates are so necessary. Though Joomla gives you full access to the site's HTML and CSS, so you can make all the changes you want yourself, most people aren't fluent in those languages. That's where the pre-made templates can be an incredible help.





Joomla comes with a few templates already installed, but honestly, they are no help. One is called Beez, and it literally has bees (the insect) all over it. Not the most charming of templates...funny, but not an eye pleaser...



Other sites and developers have much more professional looking templates with several options for modules placement.

A quick search for "Joomla templates" on Google will result in hundreds of sites where you can get free and paid templates.

Installing them is usually very simple, consisting of going to the same interface you use to install most extensions.

Once the template is installed, you can go to the "Extensions >Template Manager" and you should see the new template as one of the options. Check the bullet for that template and click on the star that says "Default" on the upper right hand side of the screen. Now if you go and look at your site you will see the new template.





One thing that causes a lot of confusion is when someone uploads a template they saw a screenshot for, and once making it the default for their site, realize that their site looks very different from the picture of the template.

The main reason that happens is because a lot of times, the templates comes with several modules and plugins that have to be made active and placed on particular parts of the site. Read the instructions carefully if they are provided and don't assume your site will look identical to the picture in the template.

Some extensions I suggest:

For some suggestions for extensions I would suggest checking out my MUO article:

"10 Best Free Joomla Extensions You Can't Live Without"

Some sites for free templates:

Joomla24 Joomlaxe SiteGround









Joomla Community and Support

One of Joomla's major strengths is its community. Being such a large group of people, all levels of users are constantly asking questions, and most major ones have already been answered by someone somewhere, so checking out the forums (http://forum.joomla.org/) and the Wiki pages (http://docs.joomla.org/) can answer most questions you might have.



Conclusion

Like most interfaces with a lot of features, Joomla can seem to have a long learning curve, due to all of its features and all its possible configurations. The task is much less time consuming that it seems, especially if you set yourself to master one feature at a time. In no time you can have an easy to update dynamic site that can also grow with you.

Changing looks and adding features can be done in minutes and major configuration changes can be done by changing a few files. If you've ever considered using Joomla, I hope this guide inspires you to give it a try, and I hope it helps to make your new CMS experience a much easier one.

If you ever run into any problems using Joomla, please ask for help at <u>MakeUseOf Answers</u> and someone will be able to assist you with your matter, or <u>view other Joomla questions</u>.

Further Reading

If you would to read more about Joomla, make sure you read the following Make Use Of articles:

- 10 Best Free Joomla Extensions You Can't Live Without
- Building an Intranet For Dummies A Step by Step Guide
- How To Build a Free Website That Makes Money Without Any Coding





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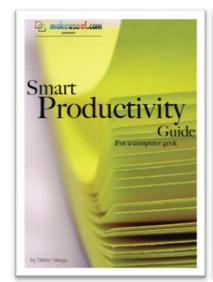
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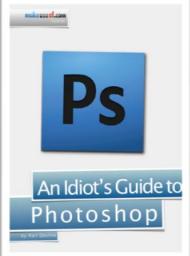




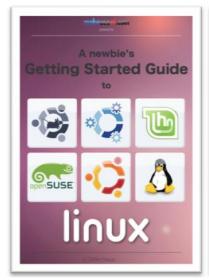
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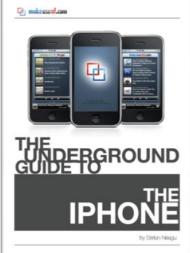
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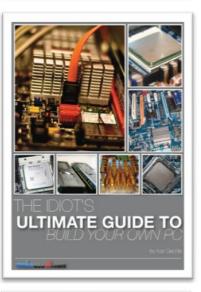


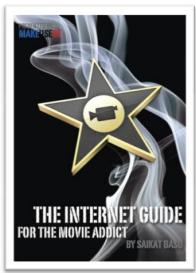


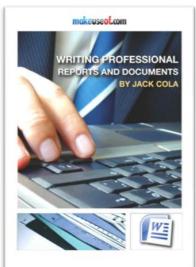














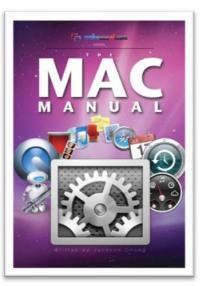




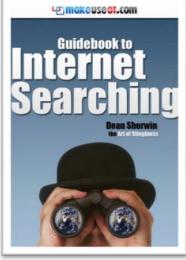
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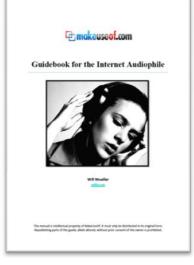


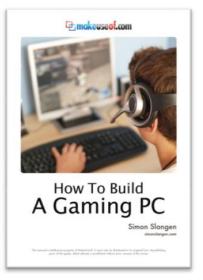
















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