MODx Content Management System 1.0.3 - *QuickStart Guide*

MODx User Guide

MODx Content Management System

User Guide

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Read Me First

Modx is an expandable and highly configurable content management framework. Because no two MODx installations will be exactly alike from website to website, there are some important topics to touch on before proceeding through this user's manual.

MODx Look and Feel

Administrators have the capability to change the MODx graphical theme based on personal preference. The MODx control panel demonstrated in this manual uses a theme called **MODxGreenEvo**, which provides a colorful interface with good contrast that is easy on the eyes. Your MODx control panel may have a different theme. If you don't like the theme configured for your MODx site, ask your website administrator to change it!

Access controls and permissions

MODx provides exellent user and group management. The MODx site administrator has fine-grained control over what a user or group can see and do from the control panel. Because you may be a MODx user not in the capacity of an administrator, you may find yourself with limited access. Some of the help topics in this guide may not apply to you. You may also find that some fields, tabs, or controls displayed in this manual may be missing from your MODx control panel. These things are access controls at work. If you want more administrative liberty with your MODx site, talk to your website administrator.

Browser Compatibilty

In theory, you can administer your MODx site from any modern web browser. In practice, however, the MODx control panel does not work consistently across all browsers. If you find that MODx is not functioning normally, throws error messages, or simply hangs, you may want to log-in to the MODx control panel from a fresh installation of the Mozilla Firefox browser. Mozilla Firefox touts itself as "the world's best browser," and for good reason. The MODx control panel tends to run best on it.

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# Introduction to the MODx Administrative Interface

The **MODx administrative interface** is the window that appears once you successfully log in.
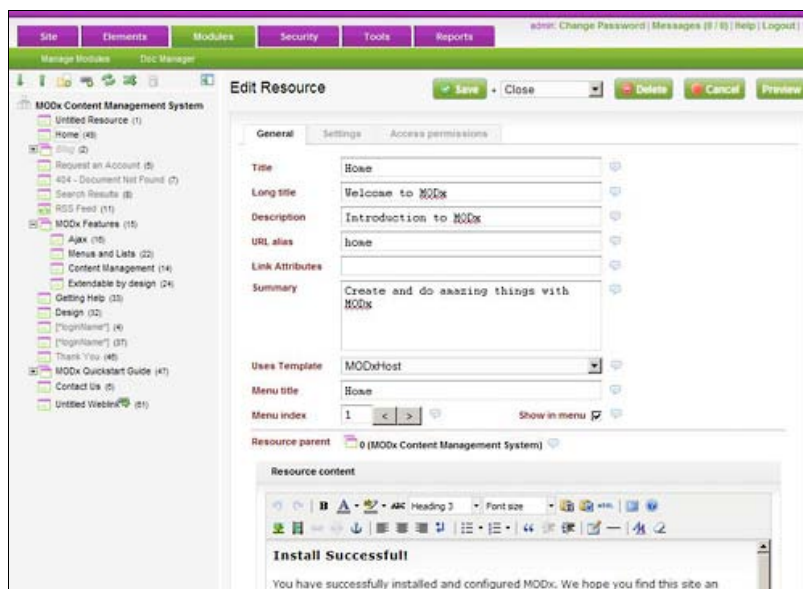
The administrative interface can be divided into three distinct panels:

1. **The Administrative and Main Navigation**
   This top area contains the links you will use to navigate through the various administrative tasks, such as loading site tools, site configuration, stats and logging, and so forth. It also displays basic information about the currently logged in user. When you need to switch from task to task, you will navigate by way of these controls.
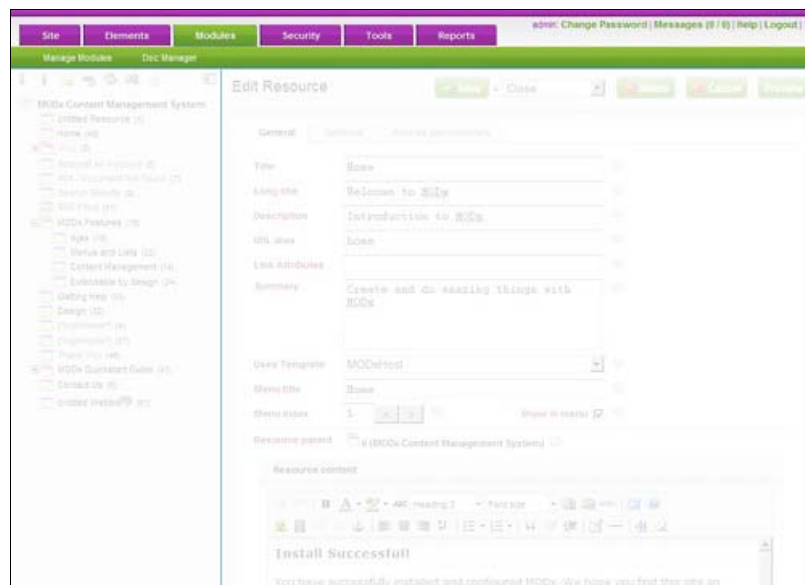
2. **The Resource Browser**
   Similar to a site map, this panel displays all of the web pages, weblinks and containers (collectively, *resources*) that you have created for your site. It stylizes items so you can tell at a glance whether a resource is published, hidden, or deleted. You will navigate through items in the Resource Browser when you wish to edit, move, and delete resources.

3. **Content Window**

This is a multi-purpose content area. It will contain the contents of the resource in which you are currently editing. It will contain the contents of any selected administrative task. In general, this area is populated with data and controls when interacting with various parts of the administrative interface.
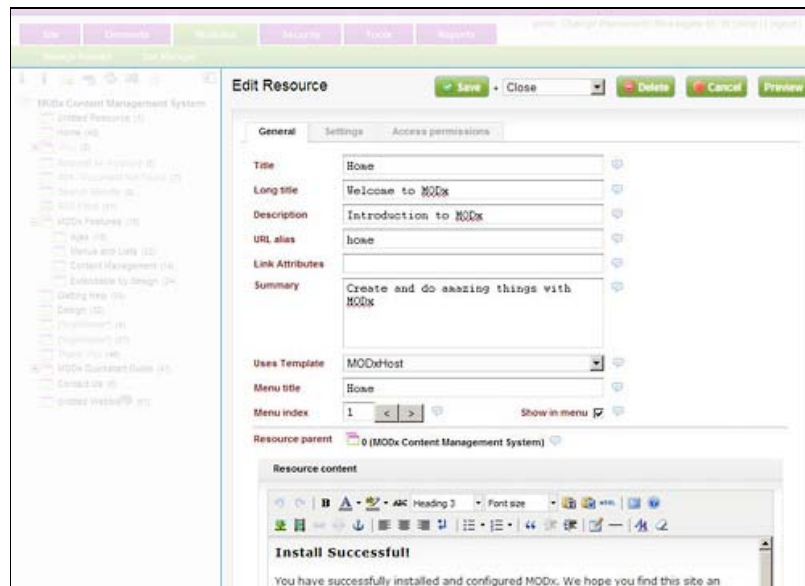
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About Resources

Generally speaking, a **Resource** is a **MODx web page**.

"*Why not call a web page, a webpage? Why call it a Resource?*"

Think of a web page, and you tend to think of something you navigate to in a web browser that displays content.

A MODx web page is different. While on the surface it does basically the same thing - providing content for a visitor to browse to - the similarity ends there.

A MODx web page, from administrative control, can not only be edited for content, it can be **configured for functionality**. For example, it can be configured as a weblink to automatically redirect the user to a different web page. It can be configured as a container (similar to a folder) for grouping related web pages. It can even be a combination of these things.

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The Resource Browser

The **Resource Browser** panel lists all of the Resources (web pages, weblinks, containers, etc.) you have created for your site. Resources are conveniently organized and stylized, so you can tell at-a-glance what the Resource is, where it's positioned in relation to all other links, and its current status. When you need to edit, move or delete a Resource, you will select your Resource from this panel.

The Toolbar

At the top of the panel you will find the **Resource Browser Toolbar**.

This collection of buttons perform the following actions within the Resource Browser:

Expand Site Tree - This is a convenient way to quickly open all containers without having to click on each container's expand [+] icon.

Collapse Site Tree - Collapses all containers without having to click on each container's collapse [-] icon.

New Resource - Opens the Create Resource panel for you to begin work on a new Resource.

New Weblink - Opens the Create Resource panel, prepared with fields for configuring your new Resource as a weblink.

Refresh Site Tree - Normally the site tree automatically refreshes on page updates, but a browser glitch may interrupt the process. Click this button to force the site tree to refresh.

Sort the Site Tree - This button allows you to temporarily change the display arrangement of Resources - by name, id, ascending, descending, etc. Sorting is completely passive, and does not alter the actual menu arrangement in any way.

Purge Deleted Resources - Clicking this button will permanently remove items that have been flagged as deleted (as indicated by their ~~strikethru~~ status).

The Site Root

Just beneath the toolbar is the **Site Root**, which is the starting point for the site's link structure.

The site root is assigned a name, which should be descriptive of the site as a whole - such as a company name or service name. The name chosen is important, as it will appear on every page within the browser 'chrome' at the top:

The Site Tree

The **Site Tree** lists all of the Resources available on the site in an orderly parent-child relationship.


The basic anatomy of an item in the Site Tree consists of three elements, from left to right:

1. **A content icon**. This icon represents the contents of the Resource. The icon is clickable in most browsers, which will bring up a context menu for accessing commands.

2. **A Resource name**. Clicking on the name will open the Resource for editing.

3. **The Resource ID**. Each identifier is unique.

To help distinguish between the various types of Resources (web pages, weblinks, containers, etc), items in the Site Tree have special icons and styling:
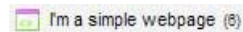
Web page - this Resource is a web page. When a visitor browses to this page, the page's content will be displayed.


Weblink - this Resource is a weblink. When a visitor browses to this page, it will immediately redirect to a different web page, as specified in the page parameters.
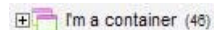
Container - this Resource is a container. It acts like a folder, and other Resources can be placed inside of it. You would create sub-links by placing Resources inside containers. A Container can be empty, or it can also display content just like a web page. To view the contents of the container, you would click on the [+] icon.

You may occassionally see a Resource with a different type of content icon. By default, a Resource is configured to display basic html markup as a web page. But a Resource is also capable of delivering a variety of specialized content. You can configure a Resource to deliver a PDF document 📕, XML code for RSS feeds 📄, a downloadable Excel file 📗, and other advanced types of content.

The appearance of Resources in the Site Tree are further stylized to inform you of the Resource's status:
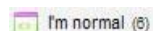
Resource is published - this item is published and viewable online.

Resource is un-published - this item cannot be viewed online. It is only available from the administration interface for editing.

Resource is published, but not visible in menus - this item can be viewed online, but has been configured to not be listed in any menu bars. You would find certain types of pages such as search results, "document not found", and form responses hidden from menus, since you would not want a user to directly navigate to these pages.

 ~~I've been deleted~~ (8)

Resource has been deleted - Deleting a resource removes it from public view, but the item will remain in the Resource Browser marked this way. This gives you the opportunity to un-delete it should you change your mind.

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The File Manager

The MODx administrator interface provides you with an integrated **file management utility**. The MODx file manager displays the files and directories on your web server, allowing you to browse directories, upload and download files, view and edit documents, and more.

Components of the File Manager interface

The current directory location

At the very top of the **File Manager** is your current **directory location**.

Here, the single slash indicates that we are in the top, or *root-level* directory. As you navigate through directories, the slash will change into a 'bread crumb' trail, starting from the top directory through to the current directory, displaying each directory that is passed through along the way. This can provide helpful information if you are in a deeply nested directory and aren't quite sure about the path you took to get there.

For example, if you are viewing the site's **docs** directory, you would see a directory location such as:

Directory controls

Beneath the directory location are a few useful directory controls.

By clicking on these controls you can navigate out of directories and create new ones. In many cases, though, one or more of these controls will be hidden, indicating that the control is not applicable for the current directory.

The directory listing

Beneath the directory controls is the **directory listing** for the current directory. This displays a listing of all files and folders contained in the current directory.

The listing is divided into four columns.

Filename column

This column displays the current directory's file and folder names. Folder names are clickable, allowing you to navigate into them to change directories.

Modified column

Every time a folder or file is updated, the time and date in which it was saved is recorded as part of the file's *metadata.* Having this information is helpful, for instance, if you are regularly re-uploading updated versions of the same file, and want to make sure that the version on the server is the newest version. This column shows you the file's modified date. Note that the time is 24-hour time.

File size column

This column lists the file size of files and folders. Note that the file size of folders does not take into account the contents of the folder.

Options column

This column provides icons to interact with the file or folder, depending on the type of file and what permissions are in place.

Directory information

```
Directories: 2
Files: 4
Data: 23.54 KB
Directory writable? No.
```

Beneath the directory listing is a small cluster of information about the currently visible directory. For this example, we can see that there are two directories (*squirrelmail* and *assets*), four files (*htaccess*, *index-ajax*, *index* and *robots*), the total size of the directory is 23.54 KB, and the directory is not writable - meaning you can't alter the contents of it.

File upload

At the bottom of the file manager are the **file upload** controls.

To upload a file, you would click on **Browse**. A modal box will appear, allowing you to select a file from your computer. Although you can only pick one file at a time from the popup modal box, you can continue to hit Browse while adding additional files to your upload list.

If you do not see the file upload controls, this means that either the current directory is not writable, or you do not have upload permissions. You will not be able to upload files. In place of the file upload controls, you will see something like:

Where to find the File Manager

To open the File Manager, navigate to **Elements -> Manage Files**.

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Using the File Manager to upload images

The **File Manager** can be used to upload images to your web server.

- ## To upload images using the File Manager:

  1. Navigate to **Elements->Manage Files**. The **File Manager** panel will load.

     An **alternative method** to upload images is via the Rich Text Editor. That method has the added benefit of automatically creating thumbnail previews to help you pick the right image when editing your document.

  2. Locate the folder named **assets** — this is where all site files reside. **Click on it** to change directories.

squirrelmail	08/09/2009 09:09:56 19 B		
assets	05/21/2010 07:18:31 512 B		
.htaccess	04/01/2010 18:07:12 1.2 KB		
index-ajax.php	01/01/2007 11:03:54 974 B		

     Note: This is a sample directory listing. Your files and folders will appear different.

  3. The assets folder will open, and you will see that it contains a directory listing very similar to the image on the right.

     Locate the folder named **images**. **Click on it** to change directories.

  4. This **images** folder is the base location where all images reside. As a rule, you should never upload images in any directory outside of **images**. *Note: Your MODx administrator may have set up a unique directory structure. Contact him/her for information.*

     You can upload your images here if you wish, although it is recommended that you organize and group your images into **subfolders** within **images**. For example, you may have a subfolder called photos within images (*assets/images/photos*), or a subfolder called backgrounds within images (*assets/images/backgrounds*)

  5. Be sure you are in your preferred image directory before continuing.

  6. Upload the image or images.

     cache
     docs
     export
     files
     flash
     images
     import
     js
     media
     modules
     plugins
     site
     snippets
     templates

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Navigating, creating and deleting directories

Here are the methods for navigating, creating and deleting files.

- ## To navigate into a folder and view its directory

  1. Click on the **folder name** to open the folder. For this example, you might click on **docs**.

  2. The page will reload. You are now in the **docs** folder looking at its directory listing.

  3. Verify you are in the correct directory by looking at the **directory path,** listed at the top-left corner of the **File Manager** panel.

- ## To navigate out of the current directory

  1. Locate the link named **Up one level**. This link can be found near the upper-left corner of the **File Browser**. Click on this link.

  2. The page will reload. You will move out of the current directory, up one level to the next highest directory.

     Alternatively, you could click on the **To top level** link, which will move you out of the current directory straight to the top level directory. This is a convenience if you find that you are in a deeply nested directory and you just want to get back to the top level.

- ## To create a new directory

  1. Navigate to the directory where you would like your new directory to be created. *Note: be sure to read file system best practices first, to understand how site assets are organized in special directories*.

  2. Verify that the directory is **writable**. Look towards the bottom-left corner of the **File Browser** for a small group of statistics text.

     The **Directory writable** status should read **Yes**. If it reads no, you will not be able to create a directory here.

  3. Locate the link named **New Directory**. It is located near the upper-left corner of the **File Browser**. Click on it.

  4. A modal box will appear. Enter the **new directory name** (avoid using spaces and punctuation). Click **OK**.

5. The page will reload and your new folder will appear in the directory listing.

- **To delete a directory**

  1. If the directory is writable, you should be able to delete it. You can tell at a glance if a file can be deleted by the presence of a red delete button in the **Options** column of the directory listing. If this button is visible, clicking it will delete the folder. If this button is not visible, the folder cannot be deleted.

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File and directory best practices

When u der. If this button is not visible, the folder cannot be deleted.

*

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Glossary

- **Cache, Caching** - The process of caching (pronounced 'kash-ing') helps improve performance by *saving and reusing the output* of a MODx process, such as preparing a web page for display or running a complex snippet.

  To illustrate, when MODx prepares a web page in response to a visitor request, the process involves many technical back-end operations such as making database calls, running scripts, gathering assets, and parsing templates. To make things more efficient, MODx will go through the work of preparing the web page *only once*. When the web page is assembled and ready for display, it is sent to the visitor--and-- *MODx keeps a copy for itself* in a cache. The next time the web page is requested, MODx will have a copy of the page already prepared and simply send the copy to the visitor.

- **Child -** A child is any Resource which is contained within another (parent) Resource. To use more generalized computer terminology, it is an item in a folder. A Resource can be both a child and a parent at the same time.

- **Chunk -** A Chunk is a pre-defined piece of raw (X)HTML and/or Javascript code that can be re-used later in other resources. It may containt client-side scripting (Javascript), but cannot contain server-side scripting (PHP).

- **Container -** A container is a Resource which contains another Resource. This is another word for 'parent.'

- **Element -** 'Element' is a generic term for any content which is not a Resource. Content editors may only access 'Chunk' and 'Snippet' elements.

- **File -** A file is a block of data stored on a computer hard drive or other type of non-volatile memory that can represent a document, image, or other type of asset.

- **Folder** - A virtual container within a computer file system in which groups of computer files and other folders can be kept and organized.

- **Parent -** A parent is a Resource which contains another (child) Resource inside of it. To use more generalized computer terminology, it is a type of folder. A Resource can be both a child and a parent at the same time.

- **Resource -** A Resource is a general term used to refer to a *web page*, a *weblink*, or a *container*, in MODx.

- **Snippet** - A Snippet is a pre-defined piece of PHP code that can be re-used later in other resources.

- **Template -** A template is a set of web resources which, together, form a theme or a skin for the website. A template typically includes customized images, a customized layout file, and a customized CSS file.

- **Weblink -** A weblink is a URL which is stored as a Resource so that it can later be used in menus, navigation, or other Resources. Weblinks can either be to external webpages (e.g. Google) or internal Resources (e.g. your company's "Contact Us" page). It is not necessary that all URLs included in a webpage be first saved as Weblinks!

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How to create a new web page

Recall that a *resource* in MODx is a general term that can mean a *web page*, a *container* for other resources, or a *web link*. This section will show you how to create a resource that functions as a web page.

The steps you will take depend on whether you wish to create your new page in the root directory, or if you want to create your page inside a container. *Note: You can always move your new page after it is created.*

- ### To create your new page in the main root directory:

 1. Click on the **New Resource** button in the **Resource Browser** toolbar.
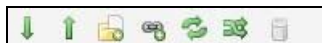
     Alternatively, you could navigate to **Site -> New Resource** in the main toolbar.

  2. The **Create Resource** panel will appear, where you can enter the appropriate page details and content.

  3. Click **Save** on the upper-right corner of the page to save your new page.

- ### To create your new page within an existing container:

  1. In the **Resource Browser** panel, click on the context menu icon next to the name of the container you wish to create your new page in. *Note: Containers are easily identified by the [+] or [-] icons preceding them.*
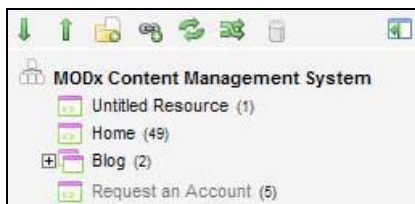
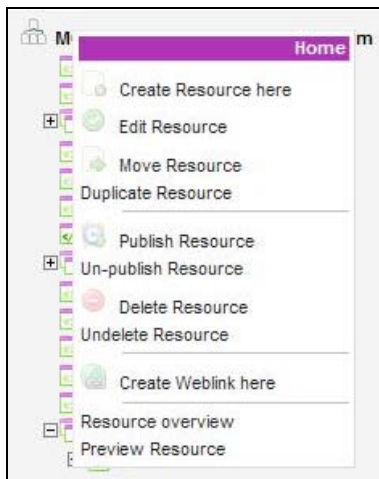 2. Click on **Create Resource Here** from the list of options.

  3. The **Create Resource** panel will appear, where you can enter the appropriate page details and content.

  4. Click **Save** on the upper-right corner of the page to save your new page.

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How to create a new container

Recall that a *resource* in MODx is a general term that can mean a *web page*, a *container* for other resources, or a *web link*. This section will show you how to create a resource that functions as a container.

The steps you will take depend on whether you wish to create your new page in the root directory, or if you want to create your page inside a container. *Note: You can always move your new container after it is created.*

- ## To create your new container in the main root directory:

  1. Click on the **New Resource** button in the **Resource Browser** toolbar.
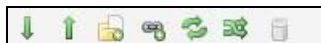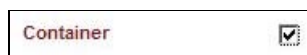

     Alternatively, you could navigate to **Site -> New Resource** in the main toolbar.

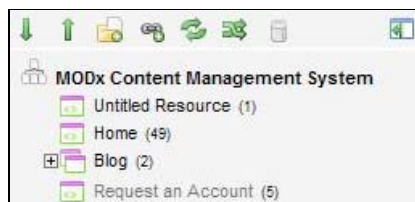 2. The **Create Resource** panel will load. In the top of the editor panel, click on the **Settings** tab.

  3. Check the **Container** checkbox to configure this resource as a container.

  4. Click the **General tab** to return to the main resource configuration, where you can specify your new container details.

  5. Be sure to click **Save** on the upper-right corner of the page to save your container.

- ## To create your new container within an existing container:

  1. In the **Resource Browser** panel, click on the context menu icon next to the name of the container you wish to create your new page in. *Note: Containers are easily identified by the [+] or [-] icons preceding them.* Depending on your browser, you may be able to right-click on the resource name to bring up the context menu.

  2. Click on **Create Resource Here** from the list of options.

3. The **Create Resource** panel will load. In the top of the editor panel, click on the **Settings** tab.

4. Check the **Container** checkbox to configure this resource as a container.
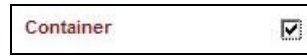
5. Click the **General tab** to return to the main resource configuration, where you can specify your new container details.

6. Be sure to click **Save** on the upper-right corner of the page to save your container.

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How to create a new web link

Recall that a *resource* in MODx is a general term that can mean a *web page*, a *container* for other resources, or a *web link*.

This section will show you how to create a resource that functions as a web link. A web link has no content of its own, but simply redirects to another page, file, image or other publicly-available resource on the internet.

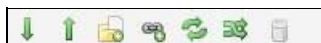The steps you will take depend on whether you wish to create your new web link in the root directory, or if you want to create your web link inside a container. *Note: You can always move your new web link after it is created.*

- ## To create your new web link in the main root directory:

    1. Click on the **New Web Link** button in the **Resource Browser** toolbar.

       Alternatively, you could navigate to **Site -> New Weblink** in the main toolbar. It's a matter of personal preference.

    2. The **Create Resource** panel will load. Locate the field marked **Weblink**:

    3. You can specify your link in one of two ways:

       If you wish to link to another resource in MODx, click on the picker icon . When the icon changes to , the field is in *picker mode*, and expects you to click on the name of the resource in the **Resource Browser** that you wish to link to.

       If you wish to link to something on the internet, such as an external webpage, file, pdf, etc., type in the full url in the text area of the **Weblink** field. For example, to create a link to Google, type http://www.google.com in the text area.

    4. Click **Save** on the upper-right corner of the page to save your new web link.

- ## To create your new web link within an existing container:

    1. In the **Resource Browser** panel, click on the context menu icon next to the name of the container you wish to create your new web link in. *Note: Containers are easily identified by the [+] or [-] icons preceding them.* Depending on your browser, you may be able to right-click on the resource name to bring up the context menu.

2. Click on **Create Weblink Here** from the list of options.
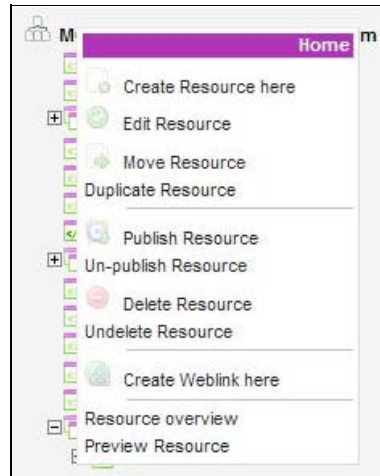
3. The **Create Resource** panel will load. Locate the field marked **Weblink**:

4. You can specify your link in one of two ways:

   If you wish to link to another resource in MODx, click on the picker icon . When the icon changes to , the field is in *picker mode*, and expects you to click on the name of the resource in the **Resource Browser** that you wish to link to.

   If you wish to link to something on the internet, such as a webpage, file, image, pdf, etc., type in the full url in the text area of the **Weblink** field. For example, to create a link to Google, type http://www.google.com in the text area.

5. Click **Save** on the upper-right corner of the page to save your new web link.

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How to un-publish a resource

Recall that a *resource* in MODx is a general term that can mean a *web page*, a *container* for other resources, or a *web link*.

When un-publishing a resource, you are preventing the resource from being displayed on-site for public viewing.

Note: Even though a resource is un-published, you can still edit the document and preview it via the administrator interface.

- ## To quickly un-publish a resource:

    1. In the **Resource Browser** panel, click on the context menu icon next to the name of the resource you wish to un-publish. Depending on your web browser, you may also be able to right-click on the resource name to bring up the context menu.
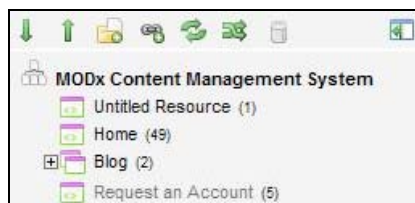
    2. Click on **Un-publish Resource** from the list of options.
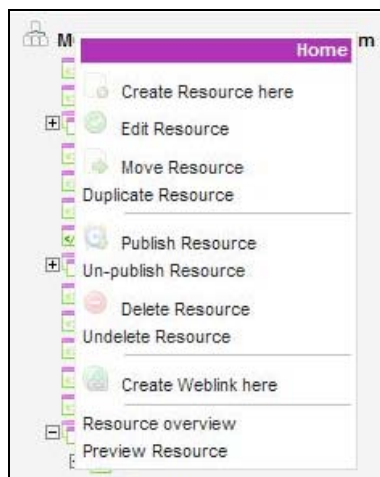
    3. A modal box will appear, asking you to accept or cancel the change.

- ## To unpublish a resource from the Resource Editor:

    1. If you are in the **Edit Resource** panel currently editing the resource you wish to un-publish, click on the **Settings** tab.

    2. Locate the **Published** field. Un-check the field.
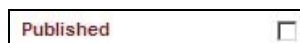
    3. Click **Save** on the upper-right corner of the page.

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How to automatically publish a resource on a future date.

Recall that a *resource* in MODx is a general term that can mean a *web page*, a *container* for other resources, or a *web link*.

This section will show you how to specify a date in the future to automatically publish a Resource.

- **To specify a date to automatically publish a resource:**

    1. You will need to have the Resource open for editing. If the Resource is currently not open, locate the Resource's name in the **Resource Browser** panel and click on it.

    2. The **Edit Resource** panel will load. Click on the **Settings** tab.

    3. Locate the field named **Published**. Ensure that this field is NOT checked.

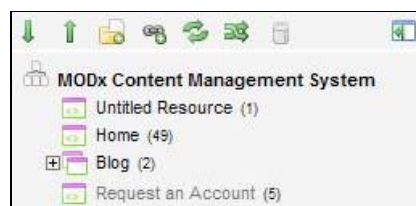   4. Locate the field named **Publish Date**. Clicking on the field will bring up a date picker. Select the future date in which you would like the resource to be published. When the date arrives, the resource will automatically become available to the public. To clear the date, click on the icon to the right of the field. *Note: If for any reason the date picker does not appear, you can manually enter a date according to the format displayed beneath the field.*

    5. To automatically un-publish your resource at a specific date in the future, locate the field named **Un-publish Date**. Select the future date in which you would like the resource to be un-published. When this date arrives, the resource will no longer be clickable or visible.

    6. Click **Save** on the upper-right corner of the page to save your changes.

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How to preview an unpublished resource

Recall that a *resource* in MODx is a general term that can mean a *web page*, a *container* for other resources, or a *web link*.

You don't have to publish a resource to preview it. Here's how to easily check your work without making the resource live.

- **To preview an unpublished resource:**

  1. You will need to have the resource open for editing. If the resource is currently not open, locate the resource's name in the **Resource Browser** panel and click on it.

  2. The **Edit Resource** panel will load. Locate the controls at the upper-right corner of the interface.

  3. If you haven't saved your work yet, click on the option field and select **Continue editing**.
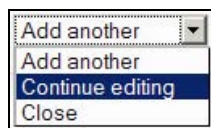
  4. Click **Save** to save your current work.

  5. When the page reloads, click **Preview** to see your work in progress.
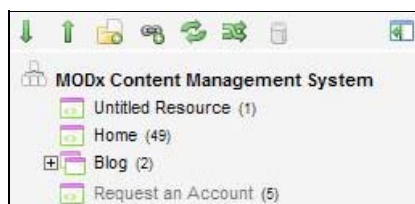
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How to delete a resource

Recall that a *resource* in MODx is a general term that can mean a *web page*, a *container* for other resources, or a *web link*.

There are two ways to delete a Resource, either from the Resource Editor or from the Resource Browser.

- ## To delete a Resource using the Resource Browser:

  1. In the **Resource Browser** panel, click on the context menu icon next to the name of the resource you wish to delete. Depending on your web browser, you may also be able to right-click on the resource name to bring up the context menu.
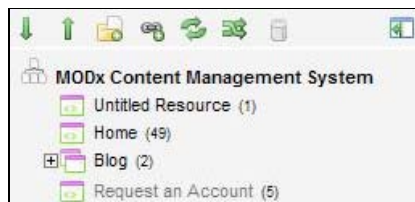
  2. Click on **Delete Resource** from the list of options.
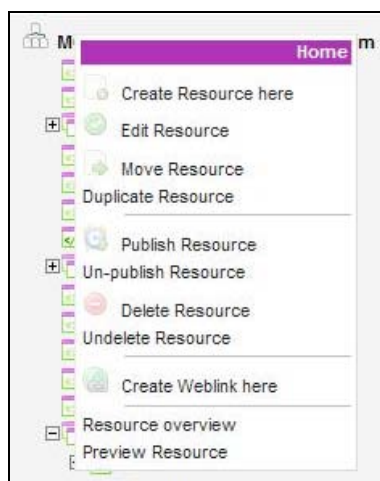
  3. A modal box will appear, prompting you to accept or cancel.

  4. In the **Resource Browser**, the Resource will appear with a strikethrough indicating it is now deleted.

- ## To delete a Resource from within the Resource Editor:

  1. If you are in the **Edit Resource** panel currently editing the resource you wish to delete, click on the **Delete** button on the control bar at the top of the Edit Resource panel.

  2. A modal box will appear, prompting you to accept or cancel.

  3. In the **Resource Browser**, the Resource will appear with a strikethrough indicating it is now deleted.

How to hide a resource from being listed in menus and site maps

Recall that a *resource* in MODx is a general term that can mean a *web page*, a *container* for other resources, or a *web link*.

Menus and site maps are automatically created by programmable menu-generating snippets in MODx. The main navigation of your website, for example, is created by a menu generator that scans all of your site's Resources and produces an ordered set of links for display and navigation.

You have the option to include or exclude Resources from being displayed in menus. This is a useful capability, as there are some pages that you would normally not want to appear in any menus. For example, your site may have a 'Page not found' error page, a form response page, or a search landing page. While you want these pages available, creating direct links to them in a menu would not make sense.

Note: Even though a Resource might be hidden from menus, the page is still 'live' and can be viewed if the user directly types in the Resource's URL

- **To hide a Resource from menu and sitemap listings:**

  1. This action requires you to have the Resource open for editing. If you are already have the **Edit Resource** panel visible, proceed to step 2.

     Otherwise, in the **Resource Browser**, locate the Resource you wish to modify. Click on the name of the Resource to open up the **Edit Resource** panel.

  2. Within the **Edit Resource** panel, locate the field named **Show in menu**. Un-check this field.
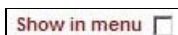
     Note: If you are having trouble locating this field, it is normally located just above the Text Editor panel.

  3. Click **Save** on the upper-right corner of the page.

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How to insert an image

Inserting an image into your document is an easy task. This guide assumes you already have your resource (web page) open with the **Edit Resource** panel visible.

- **To insert an image using the Text Editor:**

  1. In the **Text Editor** content area, position the cursor on the area in which you would like the image to appear.

  2. In the **Text Editor** toolbars, locate the **Insert/edit image** icon and click it.

  3. The **Insert/edit image** popup will appear. *Note: If you do not see the popup, your browser may be blocking pop-ups. Check your browser pop-up controls.*

  4. Locate the field named **Image URL**.

  This is where you will specify the location of your image. You can specify the image URL in one of three ways:

     1. **Manual entry** - If the image is posted online, and you know the web address of the image, e.g. http://www.my-site.com/myImage.jpg, you can enter that information directly in the text box. If you use this option, proceed to step 10.

     2. **Browse for existing image** - If the image has previously been uploaded to your server, you can browse for it. Click on the icon to the right of the field. A **File Browser** popup will appear.

     3. **Upload a new image** - You can upload an image and link to it. Click on the icon to the right of the field. A **File Browser** popup will appear.

  5. The **File Browser** is a graphical interface where you can upload and organize your images. The screen shot below is just a sample of a typical File Browser's contents. Your File Browser will have a custom set of directories and images specific to your site, so what you will see will be different from this example.
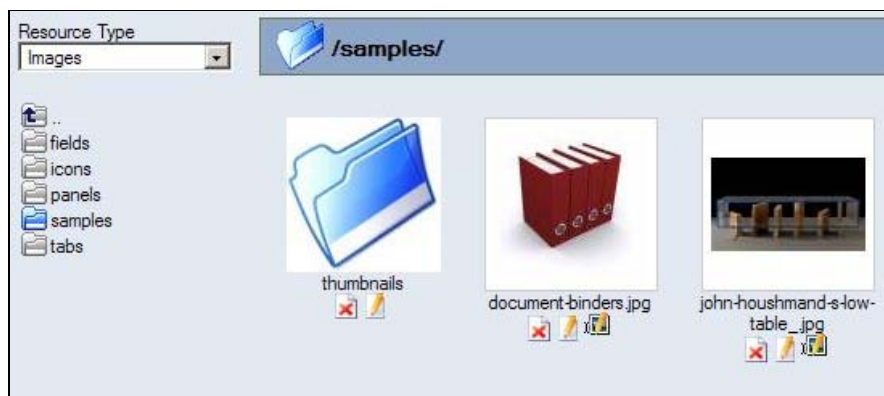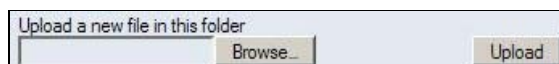
  If your image has previously been uploaded, you can navigate to the image by clicking on the folder icons. When you reach the image, click on its icon. The File Browser will close, and the Image URL field will be updated. Proceed to step 10.

  6. **To upload a new image**, first navigate to the directory in which you want the new image to be placed. You can navigate by clicking on the folder icons. If the directory you want does not exist, you can create it by clicking on the **Create New Folder** button.
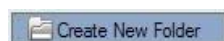
  7. Locate the **file upload controls** towards the bottom of the File Browser.

Click on the **Browse** button. Select the document from your local computer. Click the **Upload** button.

8. You will see a progress bar indicating the status of the upload. Once successfully uploaded, a thumbnail of your image will appear in the File Browser.

9. **Click on the image thumbnail** to select it. The File Browser will close, and the Link URL field will update with the image's location.

10. Locate the field named **Image Description**.

Image description [   ]

Enter a very brief description of the image.

This description will be used in place of the image on text-only browsers, or browsers with images disabled. The image description may also be used by accessible browsers for people with disabilities. For example, a specialized browser may 'speak' the image description for a visually-impaired user. Finally, the image description is beneficial from an SEO (Search Engine Optimization) perspective, and is considered valid content that will be indexed in search engine databases.

11. **Optional:** Locate the field named **Title**.

Title [   ]

You can enter a brief image title.

The image title is similar to the image description, but less importance is placed on this value. The image title's primary purpose is to *provide additional information* about the image. For example, when the image is displayed, the title may appear when you place your mouse over the image - although this effect varies from browser to browser. In general, you can safely ignore this value without adversely affecting your webpage.

12. Click the **Insert** button.
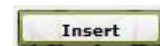
[Insert]

The **Insert/edit image** pop-up will close, and your new image will appear in the Text Editor.

13. Be sure to click **Save** so you don't lose your updates.

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How to link to a PDF or Word document

When editing your resource, you can use the Text Editor to create a link to a PDF or Word document.

- **To create a link to a PDF or Word document:**

  1. If the text for the link is already visible, highlight the text that you would like converted to a link. Otherwise, type in the name of the link where you would like it to appear, then highlight it using your mouse.

  2. In the **Text Editor** toolbars, locate the **Insert/edit link** icon and click it.

  3. The **Insert/edit link** popup will appear. If you do not see the popup, make sure your browser is not blocking pop-ups.

  4. Locate the field named **Link URL**.

     This is where you will specify your document's location. You can specify the document's location in one of three ways:

     1. **Manual entry** - If the document is posted on a website, and you know the web address of the document's location, e.g. http://www.my-site.com/document.pdf, you can enter that information directly in the text box. If you use this option, proceed to step 9.

     2. **Browse for document and link to it** - If the document has previously been uploaded to your server, you can browse for it. Click on the icon to the right of the field. A **File Browser** popup will appear.

     3. **Upload a document and link to it** - You can upload a document and link to it. Click on the icon to the right of the field. A **File Browser** popup will appear.

  5. The **File Browser** is a graphical interface where you can upload and organize your documents. The image below is just a sample of a typical File Browser's contents. Your File Browser will have a custom set of directories and files specific to your site, so what you will see will be different from this example.
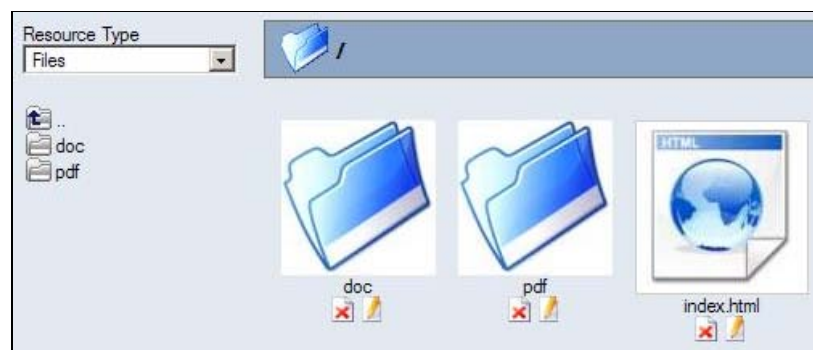
     If your document has previously been uploaded, you can navigate to the document by clicking on the folder icons. When you reach the document, click on its icon. The File Browser will close, and the Link URL field will update with the link's location. Proceed to step 9.

  6. **To upload a new document**, first navigate to the directory in which you want the new document to be placed. You can navigate by clicking on the folder icons. If the directory you want does not exist, you

can create it by clicking on the **Create New Folder** button.
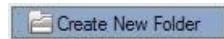
7. Click on the **Browse** button. Select the document from your local computer. Click the **Upload** button.

8. The uploaded document will appear among the other folders and documents in the pop-up window. **Click on your uploaded document** to select it. The File Browser will close, and the Link URL field will update with the link's location.

9. Locate the field named **Target**.
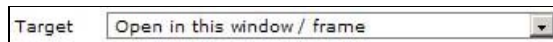
This field specifies where the document will appear when displayed.

- **Open in this window / frame** - The document will display in the main window, replacing the website. The user will need to click the back button on his/her browser to return to the site. *This is not a recommended option*.
- **Open in new window (_blank)** - The document will load in a separate window, independent from the main site. *This is a recommended option*.
- **Open in parent window / frame (_parent)** - Do not select this option.
- **Open in top frame (replaces all frames) (_top)** - Do not select this option.

10. **Optional:** You can specify a link title, which is an often helpful bit of information used by user-agents for people with disabilities. For example, the link title you specify may be 'spoken' by an aural user-agent for someone who is vision-impaired. In addition, the link title may appear as a 'tool-tip' in some browsers when your mouse hovers over the link. **It is not required**. You can leave this field blank if you wish.

To specify a link title, locate the field named **Title**.
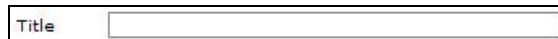
Enter a brief title for your document.

11. Click the **Insert** button.
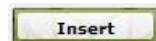
The **Insert/edit link** pop-up will close, and your new link will appear in the Text Editor.

12. Be sure to click **Save** so you don't lose your updates.

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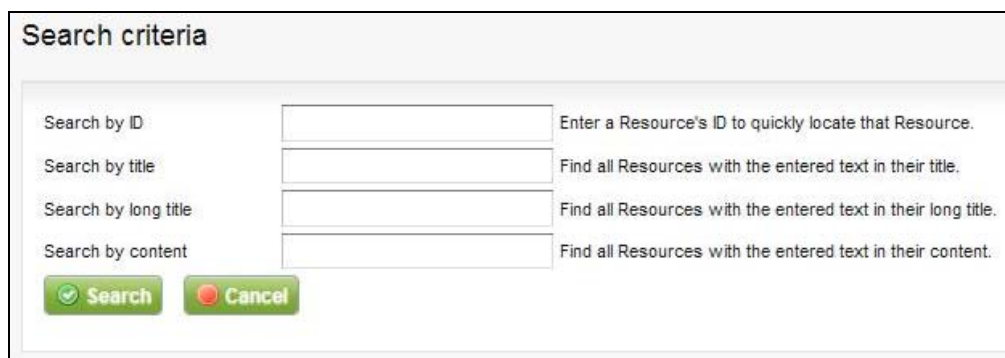# How to search for a resource, or search for content inside a resource.

You can easily search for resources (webpages, weblinks, and containers), as well as keywords in page contents, using the MODx search utility.

- **To perform a back-end site search:**

  1. Navigate to **Site -> Search** in the top administrative link bar.

 2. The **Search** panel will appear.

  3. The search utility offers four types of search criteria:

     1. **Resource ID** - You can specify a resource ID to search for a resource (webpage, weblink, or container) that may exist in the site.

     2. **Title** - The title is the copy that appears at the top of the browser window within the 'chrome'. It may also appear within webpages as a main heading.

     3. **Long title** - This field is not normally used, and will most likely not return any results.

     4. **Content** - Enter keywords or a phrase to search for within all site pages.

     When you have entered your search criteria, click **Search**.

  4. The Search page will reload. If any pages matched your search criteria, they will be listed beneath the search fields.
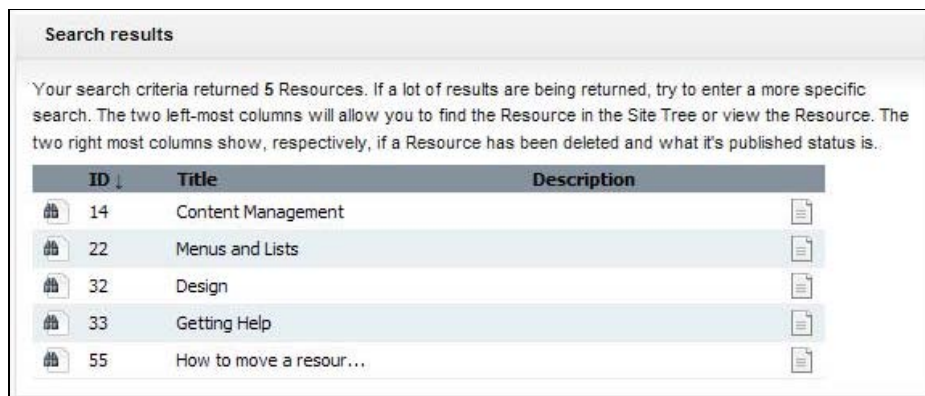
  5. To **view or edit a resource**, click on the icon to the left of the resource row.

6. The icon to the right of the resource row indicates the **resource's published status**:

    The resource is published.

    The resource is a container, and is published.

    (or no icon) The resource is not published.

How to change the name of the page's link as it appears in a navigation bar

Recall that a *resource* in MODx is a general term that can mean a *web page*, a *container* for other resources, or a *web link*. This section will show you how to create a resource that functions as a web page.

The **menu title** is what the visitor sees as a link to the page *only* when the page is listed in automatically-generated navigational menus and site maps. An example of this type of menu would be the main navigation on your site.

The menu title is not required. In fact, you can normally leave this field empty. When the menu title is not specified, the text for the link will be taken from the Resource's **page title**.

There are instances, however, when the page title seems too long and you want to use a shorter version for the menu bar. Or, the page title may be too ambiguous for a link, and you want to make the link appear more concise in the menu bar.

Here is the simple procedure for specifying a custom menu title.

- **To specify a custom menu title**

   1. You will need to have the **Edit Resource** panel visible. If you are not currently editing the Resource you wish to administer, locate the Resource in the **Resource Browser** and click on the Resource's name.

   2. In the **Edit Resource** panel, locate the field named **Menu title**.

      Enter the title as you would like it to appear in navigational menus.

   3. Click **Save** on the upper-right corner of the page to save your changes.

      Note: the name of the Resource in the Resource Browser will not change; it will always display the page title.

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How to change the Resource URL

Recall that a *resource* in MODx is a general term that can mean a *web page*, a *container* for other resources, or a *web link*. This section will show you how to create a resource that functions as a web page.

The **URL alias** is the name of the page a visitor would type in a web browser to access the Resource online. For example, this URL alias is *"how-to-change-the-resource-url"* (you can verify this by looking at the address bar in your web browser)

http://www.studioefx.com/modx-user-guide/how-do-i/how-to-change-the-resource-url
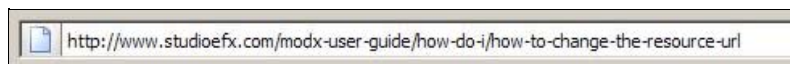
The URL alias is not required. In fact, you can normally leave this field empty. When the URL alias is not specified, the Resource URL will be taken from the Resource's **page title**.

There are instances, however, when you would want to specify a unique URL alias. One example is if the title is too long. A web browser can easily accept a long URL alias, but it may be difficult for people to write down or remember. For example, our URL alias was left empty, so it defaulted to *"how-to-change-the-resource-url"*. We could have specified a different URL alias, such as *"custom-urls"*.

Here is the simple procedure for specifying a URL alias.

- **To specify a URL alias**

    1. You will need to have the **Edit Resource** panel visible. If you are not currently editing the Resource you wish to administer, locate the Resource in the **Resource Browser** and click on the Resource's name.

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        Untitled Resource (1)
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    2. In the **Edit Resource** panel, locate the field named **URL alias**.

        URL alias

        Enter the URL as you would like it typed in a browser address bar. *Note: only alphanumeric characters and hyphens may be used. Invalid characters will be removed.*

    3. Click **Save** on the upper-right corner of the page to save your changes.

How to move a resource into a different container

A *container* is any resource that is capable of containing other resources, similar to how a folder can contain documents.
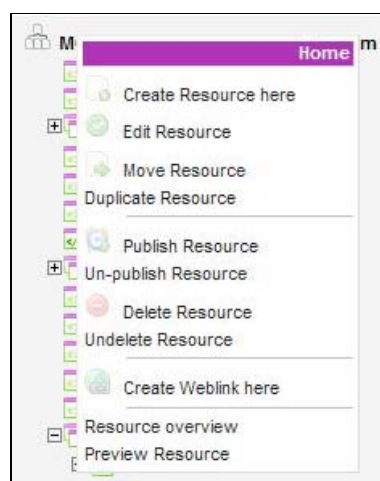
Use one of the following methods to move your resource into a different container:

- ### Moving a resource using the Resource Browser:

   1. In the Resource Browser panel, click on the context menu icon next to the name of the resource you wish to move.
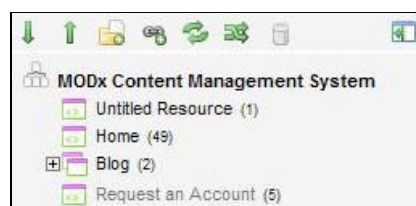
   2. Click on **Move Resource** from the list of options.

   3. A new page will appear, prompting you to click on a container in the Resource Browser. If you click on a resource that is not already designated as a container, it will automatically be converted into a container.

      Note: If your resource is *already in a container* and you wish to move it back out into the set of main links, click on the root container name:
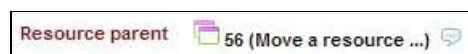

   4. Click **Save** on the upper-right corner of the page.

- ### Moving a resource from the Edit Resource Panel

   Use this option if you are currently editing the resource that you wish to move:

   1. In the Edit Resource Panel, locate the field titled **Resource Parent:**

   2. Click on the icon , which will change to , indicating that the Editor is ready to accept a new

parent container. *Note: Clicking on the icon once again will cancel the action.*

3. In the Resource Browser, click on the name of a resource where you wish to move the resource currently being edited. When a resource is clicked, the name of the resource will appear in this field, and the icon will return back to normal. Repeat steps 2 and 3 if you selected the wrong resource.

Note: If the resource your are currently editing is *already in a container* and you wish to move it back out into the set of main links, click on the root container name:

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4. Be sure to click **Save** on the upper-right corner of the page.

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How to move a resource above or below another resource

Use one of these options to arrange your resources above and below other resources in your own custom arrangement.

Arranging a resource using Menu Index

If you are currently editing the resource that you wish to arrange (with the Edit Resource panel open), use this option:

1. In the Resource Browser panel, locate the **Menu Index** field. This field displays a number representing a *display order*, where 0 is the top item, 1 would be the second to top, and so forth.

2. You can either type in the display order number, or use the arrow buttons to increment and decrement the number. When the resource is saved, it will be positioned according to the number entered. For example, if the number 4 is specified, the resource will be displayed fourth from the top.

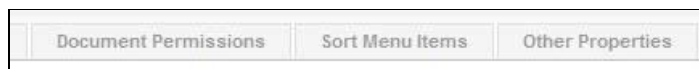3. Click **Save** on the upper-right corner of the page.

Arranging resources using Document Manager

Document Manager is a suite of tools, one of which provides an easy to use menu item sorting tool:

1. In the main tab bar, click on **Modules -> Doc Manager.**

2. When the Document Manager section appears, click on the **Sort Menu Items** tab.


3. You will need to specify the container which contains the resources you would like to sort. To specify the container, simply click on the container name in the **Resource Browser**. *Note: You can easily identify containers, as they are always preceded by a [+] or [-] sign.*
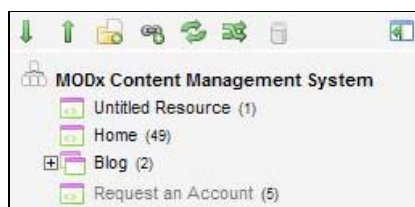
   Note: If you wish to arrange the top-level main pages, click on the site name:

4. Click on **Go** in the tool panel. The page will reload, and a set of links will appear. For example:
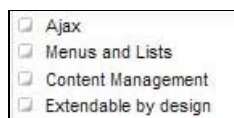
5. Using your mouse, click and drag these items until you have the arrangement you want.

6. Click **Save** to commit the arrangement.

7. The page will reload, indicating the status of the update. Click **Close Doc Manager** twice to exit the utility.

[[FirstChildRedirect]

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My page is displaying old content, even though I updated it

This can be the result of either your browser caching the old page, or the page being delivered by MODx is an older, cached version.

1. **To clear your browser's cache**:

   Refer to the help section of your browser. Sometimes this action is referred to clearing your history, or clearing files.

2. **To clear the MODx cache**:

   Navigate to **Site -> Clear Cache**. This will remove all cached pages from MODx. Note that this is always a safe operation, and will never harm your site.

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My page is not appearing on the site

When you try to view your page on the site, you get a 'page not found' error.

Solution:

1. You will need to have the Resource (webpage) open and the **Edit Resource** panel visible. If it is not open, locate the Resource in the **Resource Browser**. Click on the Resource's name.

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2. In the **Edit Resource** panel, locate the tab named **Settings**. Click on it.

   General   Settings

3. Locate the field named **Published**.

   Published   ☑
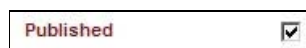
   This field must be checked in order for your page to be visible.

4. Click **Save** on the upper-right corner to save your changes.

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I can't add content at the bottom of my page.

While working with the text editor, you may notice from time to time that the cursor cannot be positioned at the bottom of the text editor to add more content. Or, trying to add more content at the bottom of the page corrupts the layout.

- **Solution:**

  1. In the **text editor** toolbars, locate the [HTML] html icon. Click on it. A pop-up will appear containing code.

  ![HTML Source Editor dialog]

  2. Scroll to the bottom of the window, and position your cursor at the end of all the content.

  3. Type the characters **
** three times, just as it appears in the image above. The tag is br (for 'line break'), surrounded by < (less-than) and > (greater-than) characters. What you are doing is adding three line breaks using html code, instead of using the graphical editor.

  4. Click the **Update** button, and the pop-up will close. You should now see some extra space at the bottom of the text editor, where you can continue adding content to your page.

     If this solution fails, substitute line break tags **
** with paragraph tags **<p> </p>** in step 3. Text Editor configurations vary from site to site, and some tags may work over others.

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Chunks

A chunk is a small, simple container for text-based content. Paragraphs of text, html markup, stylesheets, and other types of *static* content can be created and placed in a chunk.

> Static content refers to basic text that may be sent directly to the browser. Chunks will not process server-side code.

What makes chunks special is that their contents can be 'dumped' onto any resource in MODx, simply by placing the chunk's *tag* where you want the contents to appear.

To illustrate how a chunk might be useful, imagine a large fitness website that has many pages: video, photos, a blog and so forth. To protect the site owner from potential lawsuits, a legal disclaimer needs to be visible on certain pages within the site. Since the disclaimer text will not change, it can be written once, placed in a chunk, and then the chunk's tag can be placed on whichever pages require the disclaimer to appear.

How chunks work

All chunks are assigned a name when they are created. The name can be anything you prefer, but it must be unique. You cannot have two chunks with the same name. The reason for this is because **the chunk name is used to reference the chunk's contents**.
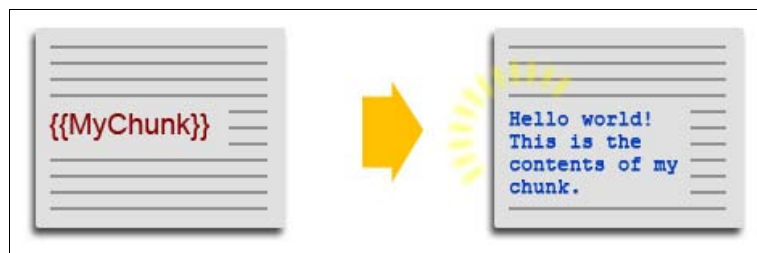

What is a chunk tag?

{{chunk-name}}

When a chunk is created and ready for use, you can use it in web pages by specifying its tag whever you want its contents to appear. The chunk name, surrounded by twin sets of curly braces as shown above, is a MODx **chunk tag**.

When MODx fetches a web page for display, it will first scan the page for chunk tags. If a chunk tag is found, the tag will be replaced with the chunk's contents.

Where can I place chunk tags?

You can place chunk tags in all MODx resources; that is, any web page or container. You can place chunk tags within other chunks. Advanced MODx components such as *snippets*, *plugins* and *modules* will also accept chunk tags. A chunk can even be called programatically (via the MODx API), which makes it even more versatile from a developer's point of view.

What would be considered a good opportunity to use a chunk?

Any time you have a block of text or other static content that may need to appear across multiple pages in a site, you should use a chunk. Chunks are also commonly used as templates to define the visual appearance of many MODx add-ons such as *Wayfinder*, *Ditto* and *Search*.

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Viewing, creating and editing chunks

From the main links, navigate to **Elements -> Manage Elements**.

When the **Manage Elements** panel loads, you may see one or more tabs across the top of the panel. Locate the tab named **Chunks** and click on it.

If you don't see the Chunks tab, you don't have the necessary permissions to manage Chunks. Talk to your MODx administrator.

You will see a listing of chunks that have been created for your site. From this list, you can click on the name of a chunk to open it for viewing and editing. Or, you can click on **New Chunk** to create a new chunk.

How Chunks are used

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Snippets

A snippet is a MODx component that adds functionality to your website.

Snippets are used for everything from automatically generating page links (the *Wayfinder* snippet), to processing site searches (the *AjaxSearch* snippet), to any type of user-created functionality such as displaying the current date or counting the number of hits on a web page.

The term *snippet* is somewhat of a misnomer. Although a snippet *can* be as small and simple as a few lines of code, it can also be as large and complex as a complete web application.

How snippets work

A snippet and its code will sit idle until you tell it to run. You control when a snippet runs by placing a **snippet tag** in a MODx web page.

When MODx prepares a web page for display, it will scan the page for any snippet tags you may have placed. If a snippet tag is found, MODx will look up the snippet and run it. If the snippet returns any value, the snippet tag will be replaced with the snippet's output.

Some snippets won't display anything. A snippet that checks if you're logged in or not, or perhaps a snippet that logs page hits, would be examples of snippets that run silently.

What is a snippet tag?

The triggering mechanism for running a snippet is the **snippet tag**.

Snippet name: **SayHello**

snippet code:

```
<?php
    return 'hello world!';
?>
```

[[SayHello]]

-or-

[!SayHello!]

[[snippet-name]]

When a snippet is created and ready for use, you can use it in web pages by specifying a [[snippet-tag]] where you want it to run. The snippet name, surrounded by twin sets of square brackets, is a **snippet tag**.

Why are there two types of snippet tags?

Snippet tags can also be represented as **[!snippet-name!].**

Bracket-bracket wrappers **[[...]]** is a *cached* snippet tag. If the output of the snippet is the same every time, for example, if it always returns the value of the mathematical constant PI, you should use this type of snippet tag.

Bracket-exclamation wrappers **[! ... !]** is an *uncached* snippet tag. If the snippet output changes, for example, if it returns a random number each time, you should use this type of snippet tag.

Click here to learn more about caching.

Where can I place snippet tags?

You can place snippet tags in all MODx resources; that is, any web page or container. You can place snippet tags within chunks. A snippet can be called within other snippets programatically (via the MODx API), which makes it even more versatile from a developer's point of view.