

Textpattern Solutions: PHP-Based Content Management Made Easy

Kevin Potts, Robert Sable, and Nathan Smith
with Mary Fredborg and Cody Lindley



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This book is dedicated to my beautiful wife and children, who have often wondered why the heck writing a book takes so darn long. They have offered nothing but the kindest support and blessed respite, and despite my agonizing over formatting inconsistencies and code accuracy, were there at the end of the day to remind me of the most important things in my life. To my children: I'm sorry the plot and characters do not make for engaging bedtime reading. (I tried to work in some fire trucks and princesses, but the editors said it "wasn't relevant.") To my wife: you could not have been a more patient, loving partner. I love you all very much.

Kevin Potts

I would like to dedicate this book to my beautiful wife, Joci. I never imagined that I would meet someone so caring and supportive to spend my life with. Thank you, Joci, for everything that you are and everything that you make me. I love you.

Rob Sable

*I would like to dedicate this book to my wife, who has stood by me throughout my meandering pursuit of job satisfaction and outlets for creativity. Thank you for listening to my ranting about funky code acronyms and encouraging me even when I cannot seem to make sense of it all. I love you more than words can express.
You are the world to me.*

Nathan Smith

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FOREWORD

When I first discovered Textpattern in 2004, I was looking for a flexible CMS that could not only power my blog but also power my whole site, especially the portfolio. I fell in love with the Textpattern XML style template tags, clean administration interface, and sheer speed and flexibility. I keep trying other alternatives, but always come back to Textpattern. To my mind, no other system can compete with its flexibility and the strength of its community.

I use it not only to power my site (www.hicksdesign.co.uk) and side projects such as Pimp My Camino (<http://pimpmycamino.com>), but also to power sites for my clients, including The Forgiveness Project (www.theforgivenessproject.com) and Open Doors (<http://student.opendoorsuk.org>). Even the most technophobic clients enjoy using Textpattern's un-intimidating administration panel to update their sites. Designers love it because they can easily set up and manage sites by themselves, inputting any content and displaying it where they want, the way they want. Everyone wins.

However, one thing that Textpattern has always lacked is a printed manual—a physical guide and reference work that also demonstrates how it can be used for everything from personal blogs to ecommerce sites. Fortunately, Kevin Potts, Robert Sable, Nathan Smith, Mary Fredborg, and Cody Lindley have more than filled that need, and you now hold the result! *Textpattern Solutions: PHP-Based Content Management Made Easy* is an excellent guide, taking you from installation, to advanced uses of Textpattern with global variables, to writing your own plugins. There is something here for all levels of users and would-be users to glean and enjoy. It's already a permanent feature of my desk!

Jon Hicks, *Hicksdesign*

ABOUT THE AUTHORS

Kevin Potts has been working on the Web since the mid-1990s, having started his career designing his first employer's website with Netscape and Notepad. He has spent the bulk of his design career working as a print designer and web developer, and is now the creative director of a large Midwestern software company. Coupled with years of freelancing and agency work, Kevin has created dozens of websites for businesses of all sizes in an array of industries. He started using Textpattern in 2004 as a blogging tool for graphicpush.com, where he still writes about the business of design and life as a creative team manager.

Nathan Smith is a goofy guy who enjoys practicing and preaching web standards. While attending Asbury Theological Seminary, he initially picked up Textpattern to build a website that could be easily updated by the staff at his church, and that led to a full-time career in web development. Nathan works as an Information Architect/Interface Designer at Geniant and writes semiregularly at sonspring.com and godbit.com. He has been described by family and friends as mildly amusing, but he is really quite dull.

Robert Sable has more than ten years of experience designing and developing web-based applications for small businesses up to Fortune 50 companies. Rob recognized the power and flexibility of Textpattern from its early gamma releases. He has published more than 20 Textpattern plugins and numerous tutorials on his website at www.wilshireone.com. Rob also provides custom software development services using Textpattern as a development framework. He lives with his wife, Joci, in Copley, Ohio, which is located between Akron and Cleveland. Rob and Joci love to travel together and continue to find new and exciting places to visit. Rob was born and raised in the Cleveland area and continues to be a painfully dedicated Cleveland sports fan.

Mary Fredborg is a member of the Textpattern development team (<http://team.textpattern.com>). For more than ten years she's been involved in various aspects of web development and remains keenly interested in learning new methods and technologies, as well as refining her existing knowledge and skills. These days you can often find Mary working on Textpattern itself, creating new plugins for it and providing technical support for users of varying levels of experience. She lives in Alberta, Canada with her amusingly crazy dog, who also happens to think the same of Mary.

Cody Lindley is a Senior Software Engineer for SuperValu, working out of Boise, Idaho. When he is not working with client-side technologies, Flash, or interaction design, he spends time with his wife and son, enjoying a simple lifestyle in the Northwest. Cody has a passion for Christian theology and takes great pleasure in learning and studying God's word. His work and ongoing ramblings can be found at codylindley.com.

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We want to acknowledge the innumerable hours of thankless work that goes into making Textpattern such a great system. The core developers have built an open-source solution that rivals many of the retail options out there, and their altruism has made possible the book you are now reading. If not for the efforts of these people, there would be no Textpattern: Dean Allen, Mary Fredborg, Pedro Palazón, Alex Shiels, and Sencer Yurdagül. We the authors tip our hats to you, and collectively look forward to where Textpattern is heading in the future.

We also want to acknowledge the dedicated editors of this book for their patience in dealing with us as inexperienced authors. friends of ED/Apress has been a great company to write for. Special thanks to the foED/Apress crew: Chris Mills, Richard Dal Porto, Matthew Moodie, Ellie Fountain, and Nancy Sixsmith. Last but not least, an incredible debt of gratitude is owed to our technical reviewer, Mary Fredborg, who has provided us with the guidance and expert input that only a core Textpattern developer can provide.

Cody, Kevin, Rob, and Nathan

INTRODUCTION

Salutations, brave reader, and welcome to *Textpattern Solutions: PHP-Based Content Management Made Easy*. Since you have this book in hand, it is a safe assumption that you are interested in the content-management system (CMS) called Textpattern. Perhaps you have heard about how its tag syntax resembles XHTML or the ease with which you can build custom templates. Maybe you are looking to switch from some other proprietary platform with restrictive licensing or just want an intuitive online text editor to use for writing and displaying a journal or blog. Whatever the motivation, it is our sincere desire that this book serve you well as both reference and tutorial, guiding you along the path to streamlined website development and maintenance with Textpattern.

Learning something new can often be a daunting task, especially when you endeavor to accomplish it alone. Hopefully this text will find a ready place on your shelf or desktop, providing simple solutions to otherwise seemingly complicated or obscure situations. Each one of this book's authors has traversed the meandering road of open-source content management, arriving at Textpattern as a powerful tool to assist in rapid site development. The book you are now reading is one that we wanted to have when we first learned to use this system. It is the result of a labor of love for a methodology that has made our lives easier. We hope that our combined knowledge will benefit you by saving the time and frustration of scouring the Internet for tips and tutorials, putting all that information at your fingertips.

Book structure

This book is divided into 17 chapters and 2 appendixes. It is obviously not a mystery novel, so feel free to skip around without fear of ruining some gripping plot (the butler did it). In fact, by the time you are done reading, Textpattern will probably be so familiar to you that none of it should seem esoteric. The chapters can be read straight through sequentially to learn things step by step, or the book can be used more as an encyclopedia to look up specific information once you have a handle on the basics.

Chapter 1 is pretty straightforward and covers the background and community behind Textpattern. Some of the more notable Textpattern sites are mentioned to give you some inspiration as you conjure up ideas for your own project. Also, the GPL and MIT licensing

models are compared and explained, which is good for those who like to use software knowing that it truly is open source and free of restrictions or fees. After all, everybody loves free stuff, right?

Chapter 2 shows you how to create a local testing environment by installing Textpattern on your own computer running Windows or Mac OS X. Since the components that power Textpattern are all freely available, they have been made to run on just about any operating system. No matter which type of setup you prefer, we've got you covered. Simply flip to the set of instructions that pertain to you and follow along accordingly.

Chapter 3 pertains to the admin section, in which you can check site diagnostics, create and manage user accounts, and check visitor logs. You can also edit a number of preferences, such as changing the site's time zone or tweaking the way your site is syndicated to external sources. This is also where you'll go to install extra third-party plugins, which then enable you to use Textpattern in new and inventive ways. If you want to migrate from another publishing platform, such as Blogger or Movable Type, there is even an import function that converts those older posts to a usable Textpattern format.

Chapter 4 covers the content section of Textpattern. Here you are introduced to the text formatting syntax called Textile, and you can begin to write basic articles. You'll learn how to arrange your site into sections and categories, as well as incorporate images and file uploads into your content. The chapter also covers how to use the links area for times when you want to call attention to something on the Web but are too lazy to write an article about it.

Chapter 5 is all about presentation, which actually happens to be much more than just looking good. You'll dig into making different site sections, associating them with page templates, and controlling their appearance using the Cascading Style Sheets (CSS) style editor. Some basics of the CSS visual presentation language are covered, as well as a few caveats to consider when coding your layout. You'll also look at TXP forms and see how they can make life a lot easier by reusing chunks of code throughout a site.

Chapter 6 dives into the world of semantics, and you'll learn the importance of properly marking up a document based on its meaning. We'll discuss the multiple layers of web development—including the content, structure, presentation, and behavioral layers—and how those four work together within the Textpattern system. You'll understand why Textpattern is explicit in its separation of content and structure, and how those two aspects are eventually woven together.

Chapter 7 explains how categories and articles work together as the primary axis for the Content tab, and how they can be used to organize your articles in associative ways. For instance, an article about a vacation to Europe could be categorized in both vacation and Europe. This way, other vacations could be grouped within the vacation category, and a different article about a business trip to Europe could be grouped in that category while not necessarily having anything to do with a vacation. You'll navigate the finer points of both pieces of the TXP puzzle, including URL structure, different status levels, and the power of keywords; and you'll tackle the management of other content: links, images, and files.

Chapter 8 explores the Presentation tab in depth. You'll learn about the symbiotic relationship between sections, pages, and forms, and how they work together with your site's

content. Using a band's website as an example, we'll break down how to develop a template step by step, from moving a raw HTML file into the Textpattern system, to outsourcing pieces of code into different forms, to editing those forms with Textpattern tags for pulling in dynamic content. In addition, we'll discuss the fundamentals of pages and sections, the options available for each, and how they work together to produce full templates for housing content. At the end of the chapter, you'll know how an entire home page is constructed in Textpattern.

Chapter 9 takes the concepts from Chapter 8 and applies them to several real-world examples. We'll discuss further the relationship between articles, sections, pages, and forms; and how they work in tandem to produce web pages. You'll learn about building a page of static content, an archive page for blog posts, a contact page, and a photo gallery. By the end of this chapter, you'll see how the core building blocks of Textpattern produce different types of content while using the same basic principles.

Chapter 10 addresses comments, some of the trickier parts of any Textpattern site. They tend to be more difficult to control than other parts of a site, but you'll learn about the numerous options and tags (as well as a virtual library of plugins) that Textpattern provides to customize them on a very granular level. Additionally, you'll get the hang of managing comments for those occasions in which pesky visitors might leave feedback that is less than welcome: whiners, spammers, and trolls—oh my.

Chapter 11 gets into more advanced territory. Starting with a few fundamental reminders, you'll learn two different ways to create customized error messages, methods for building a search box and customized search results, and finally adding dynamic metadata to all pages of your site. You'll explore some more esoteric functionality, including custom fields, keywords, more conditional statements, and several specialized tags.

Chapter 12 revisits how to make use of custom fields. Since custom fields can be whatever you want, they enable you to tailor the way things work. You can use them to build extra conditional logic into pages. You'll also learn how to use custom fields to sort articles according to criteria that you create, instead of just by date or category. You'll also look at using plugins to enable unlimited custom fields instead of the default number of ten. This unlocks much more potential, such as *tagging*, which has become quite popular on many social networking sites, enabling users to help categorize content.

Chapter 13 looks at several of the more popular and powerful Textpattern plugins. One plugin enables you to easily create an email contact form, while others can help you style the look of article comments. There is even one that enables advanced users to run SQL queries directly against the MySQL database or do an easy one-click backup of an entire site. Needless to say, this chapter will really broaden your horizons as to how extensible Textpattern can be.

Chapter 14 tests your PHP knowledge by showing you how to write a plugin. You'll explore the scenarios in which you might need to write your own plugins: if the basic Textpattern capabilities cannot handle a particular need and if others have not already addressed it with plugins of their own. The plugin architecture is explained, and you'll get a feel for the steps necessary to take an idea and make it a reusable chunk of code that others can benefit from.

Chapter 15 covers a multiauthor website. We'll show you how to create different tiers of users, with varying levels of privileges. This is useful when you want authors to be able to contribute to a site, while not necessarily letting them have authority over its entirety.

Chapter 16 shows how to use a few of the plugins covered earlier to create an ecommerce website. You'll learn about the benefits of using Textpattern to create ecommerce sites and how to use sections, categories, and articles to create an online catalog. We'll also show you how custom coded components can be incorporated into your site to offer shopping cart functions and payment system integration.

Chapter 17 describes case studies of a real live site: a start-to-finish walkthrough of the steps involved in creating a restaurant review site for a large city. By the end of this chapter, you'll have a solid understanding of how to go beyond what Textpattern offers, writing your own code to integrate directly into the system.

Appendix A is a tag reference with brief examples of how each Textpattern tag can be used. Appendix B is an extended list of commonly used helper functions and global variables from the Textpattern source that plugin authors can use when writing plugins.

Necessities

To follow along with the localized examples in this book, you need a computer with an Internet connection running Windows or Mac OS X. You might also want a graphics program of some sort. We prefer either Adobe Photoshop or Fireworks, but other free alternatives, such as GIMP (www.gimp.org) work just fine. Designers tend to be fussy about their preferred imaging software, and we certainly aren't looking to pick any fights. Our examples might vary, but we encourage you to use that with which you are familiar.

The rest of the components for this book can be downloaded and configured as needed (for example, Apache, PHP, and MySQL). To get a live site running, you need at least a shared web hosting service, of course. Because of the myriad of hosting companies and their varying options, we cannot possibly cover every scenario. We do, however, walk you through using some of the common configurations that are available by default for many web hosting environments.

To make things easier, all the custom code examples covered in this book can be downloaded from the friends of ED website: <http://friendsofed.com/>. You can type everything out manually if you feel so inclined, but to save time we recommend that you go to the website and navigate to the corresponding code download for this book. You can also check the publisher's site for any errata that might pop up, on the off chance that we have actually made any mistakes (hey, it could happen).

Layout conventions

To keep this book as clear and easy to follow as possible, the following text conventions are used throughout.

Important words or concepts are normally highlighted on the first appearance in **bold type**.

Code is presented in fixed-width font.

New or changed code is normally presented in **bold fixed-width font**.

Pseudocode and variable input are written in *italic fixed-width font*.

Menu commands are written in the form Menu ► Submenu ► Submenu.

Where I want to draw your attention to something, I've highlighted it like this:

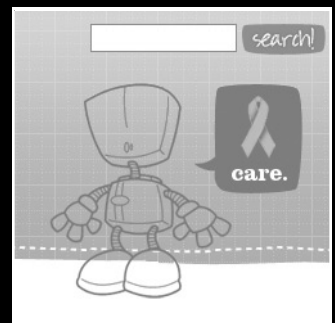
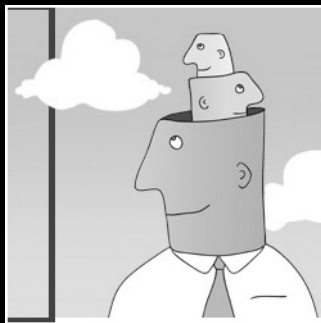
Ahem, don't say I didn't warn you.

Sometimes code won't fit on a single line in a book. Where this happens, I use an arrow like this: ➡.

This is a very, very long section of code that should be written all ➡
on the same line without a break.

PART ONE **GETTING STARTED**

1 SETTING THE STAGE



When reading any good book, there is always an engrossing first chapter that grabs your attention and beckons you to read more. While this book might not be of the suspenseful thriller genre, hopefully it will whet your whistle and get you excited about the possibilities of Textpattern (TXP). You will learn a bit about how it came to be and what the future holds in store. You will also take a look at some of the highly trafficked TXP sites out there, examining how each has chosen to implement the system.

What is Textpattern?

Ask any seasoned web developer about which tools to use for a job, and you will probably hear the same response: “It depends.” Some designers swear by Photoshop; others prefer Fireworks. Many people use the Windows operating system, though some might opt for Linux or a Mac. Similar to many situations in life, the best way to find a solution is to first define the problem. So, let’s evaluate whether Textpattern is right for you. The official site defines Textpattern as “A free, flexible, elegant, easy-to-use content management system [CMS] for all kinds of websites, even weblogs.”¹

Catchy as it might sound, that bit of prose does not fully encapsulate the power of TXP. Before you learn more about what TXP can do, let’s first identify what it is not. Think of it as appraising a piece of property. Many systems are like prefabricated homes, in which you can change only minor details. To do anything more requires quite a bit of remodeling. Using TXP can be likened to finding a vacant lot with only a foundation (albeit a very *good* one) and constructing the rest of house on your own. Depicted in Figure 1-1 is the default look and feel for Textpattern as it appears without any extra customization. Looks can be deceiving, though, for under this nondescript veneer is a powerful engine ready to be harnessed and directed.

Since Textpattern is quite diverse in what it can handle, a brief list of examples helps demonstrate the scope of what can be done with it. It can be used to run a web-based personal journal, referred to as a **weblog** (or **blog** for short). Of course, there are already a variety of services out there, such as Blogger² or LiveJournal,³ that enable someone to set up a blog. However, Textpattern gives you the leeway to choose a host of your choice instead of relying on a shared service. What also sets it apart from the crowd is the capability to manage more complex newspaper-style or multiauthor community sites.

One such site is UX Magazine, a prominent online publication focused on improving web-based user experience (see Figure 1-2). Another is the Godbit Project,⁴ which is geared toward helping churches make better use of the Web (this will be discussed in Chapter 16).

1. www.textpattern.com

2. www.blogger.com

3. www.livejournal.com

4. www.godbit.com