

MODx Users Guide

Department of Internet Ministries

Last Updated: October 2, 2013

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I. Getting Started

MODx is a Content Management System (CMS) which helps create, edit, manage, and publish information on a website. This guide refers to terminology used in MODx Evolution 1.0.10.

Important Terminology

CMS: Content Management System. An application on a website used to create, edit, manage, search and publish data on that website.

HTML: HyperText Markup Language. The basic language of all websites.

CSS: Cascading Style Sheet. A separate file from the webpage which designates the visual layout of a website.

TinyMCE: A type of WYSIWYG HTML editor used in MODx

Template: The graphics & layout wrapped around your page's content.

URL: Uniform Resource Locator. This is the full website address of a page.
(Example: <http://www.yourdomain.com/section/content/messages/>)

WYSIWYG: What You See Is What You Get. Refers to a type of HTML editor that displays the page in edit mode exactly how visitors to the site will see it. This makes creating webpages quick & easy for novice and experienced users alike.

FTP: File Transfer Protocol, is a standard network protocol used to transfer files from one host to another host over the Internet. You can use FTP through programs such as Cyber Duck or Filezilla

Logging on to the Manager

To login to your site's Manager

- Go to your website, by entering your domain name then adding “/manager/” to the end e.g. www.yourdomain.com/manager/
- Enter your username and password to login to the manager.

To logout

- In the top right corner of the manager, click Logout.



Change Password Save Cancel

Change Password

Please enter your new password, and then enter it again to confirm. Your password needs to be between 6 and 15 characters long.

New password:

Confirm password:

To change your password

- Click on the word change password in the top right corner of the manager. It will open a new window that will ask for a new password to be entered. Type in the desired new password in both boxes and click save.

II. Introduction to the Manager

The Manager area is divided into 3 panels

- Top: Admin Menus
- Left: Site tree
- Right: Editing area

You can resize the left-hand panels by dragging the middle bar left or Right. [The site administrator can also configure the layout differently]

The Site Tree

This is a list of all the pages in the website, arranged in a hierarchical order. This is where you select the pages you want to edit, move or delete. You can use the **Site Tree Icons** to perform actions on the tree.

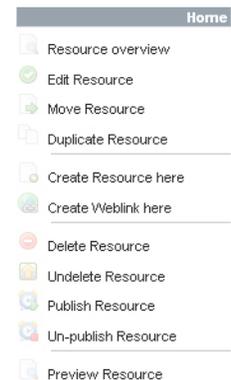
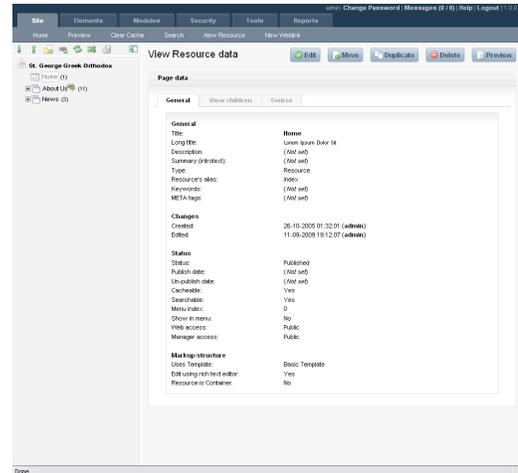


Expand Site Tree, Collapse Site Tree, New Resource, New Weblink, Refresh Site Tree, Sort Site Tree, Purge deleted Resources, and Hide Site Tree (Note: Depending on your access level, all icons may not be accessible or visible.)

Shortcuts

You can right-click on a resource's name in the Site Tree to see the **Actions Menu**. The Actions Menu gives you additional shortcuts.

- You can create **resources**, **containers** and **weblinks** in an existing Container. To do this, right click on the resource in which you want to create the new item and select one of the "Create" options. This simplifies the process of organizing your content.



Previewing on the Live Site



Under the site tab, click on the word “preview” to view your web site. Alternatively, you may want to keep your web site open in another window or browser tab. Then you can refresh the page to view any changes you make once you have saved the resource. If the menus don't appear correctly, or new content is not showing after refreshing your browser, click on **Clear Cache** in the Admin menu.

III. Creating a new Resource

To add new content to your site you must:

- Create a new Resource.
- Put the Resource in the correct location in the Site Tree.
- Publish the Resource.

Many of the available resource-specific values are only useful for internal processing or scripting. This is a list of the values that are useful for display on the page:

- **Title** – The title of the resource. Don't use backslashes in the name.
- **Long title** – A longer, more descriptive title of the resource that appears at the top of the content on the page.
- **Description** – An optional description of the resource.
- **URL alias** – This is what will show up in the website address.
(Ex. <http://www.yourwebsite.com/resourcealias>)
- **Summary** – Type a brief summary of the resource
- **Menu title** – Menu title is the name that will be used if the resource appears in a menu.
- **Menu index** – The lower this number, the higher it will appear in menus.

To create a new resource

-  Click on the **Create New Icon** on the site tree.
- Fill in the fields in the Resource Settings and add your content.

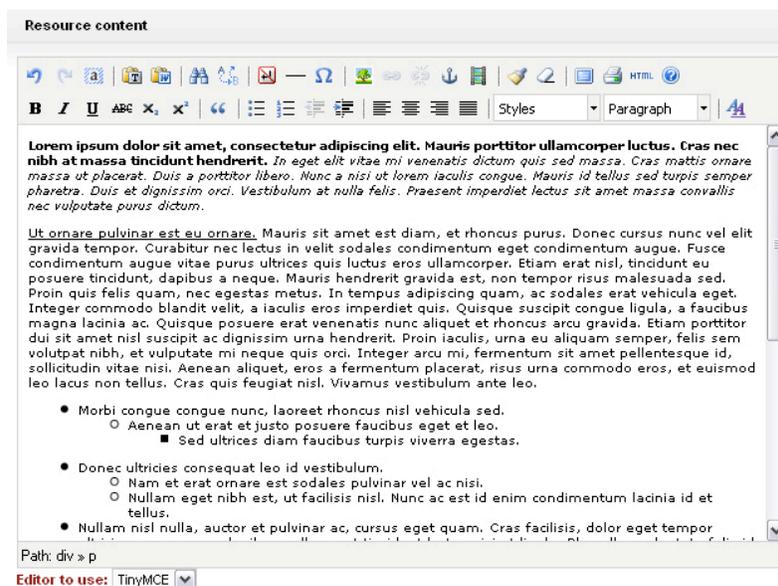
A screenshot of the 'Create Resource' form in MODx. The form has a title bar with 'Save', 'Close', 'Delete', 'Cancel', and 'Preview' buttons. Below the title bar are three tabs: 'General', 'Settings', and 'Access permissions'. The 'General' tab is active, showing fields for Title (New Page), Long title (The New Page on my Website), Description, URL alias (new), Link Attributes, Summary, Uses Template (Minimal Template), Menu title, and Menu index (9). There are also navigation arrows and a 'Show in menu' checkbox.

- In the General tab of the Resource Settings panel, select the location of the resource by clicking on the **Resource parent** folder icon, then click in any resource in the site tree.
- The parent will be displayed in the Resource parent field.
- (Note: If you right-clicked in the Site Tree to create the resource, the resource will be created in the Container upon which you right-clicked.)
- Click  to save the content.

IV. Editing Existing Resources

To update existing content on the site:

- Locate the page (called a resource) in the site tree.
- Click on the resource's name to open the resource for editing.
- Edit the page with the WYSIWYG editor under the Resource Content heading.



- Save the page by clicking the  button at the bottom of the editing area.

To learn more about editing the resource's content using the TinyMCE WYSIWYG Editor, see the section entitled "How to use the Content Editor" later in this manual.

(Note: A container is essentially a folder in which you can move resources to setup the navigation for your website. In addition to holding resources, a container can also display content when a user views it as a page. You can convert a resource into a container at any time, by moving a resource or container into it.)

V. Publishing a Resource

When you create a new resource it will be un-published (i.e. cannot be viewed by visitors of the website) by default. If the resource is unpublished it will appear italicized and greyed in the site tree.

Site Tree Views

Black, normal – Published Item

Greyed, normal – Published, not visible in menus

Red, italicized – Unpublished Item

Red w/ Strikethrough – Deleted Item (can be undeleted)



Publish a New Resource

- Click on the unpublished page in the site tree and click Edit.
- Click on the Settings tab.
- Check off the Published box (or set a date to publish) and Save.

General	Settings	Access permissions
Published	<input checked="" type="checkbox"/>	
Publish date	<input type="text"/>	
	<small>dd-mm-YYYY HH:MM:SS</small>	
Un-publish date	<input type="text"/>	
	<small>dd-mm-YYYY HH:MM:SS</small>	
Resource Type	Web page	
Internet Media Type	text/html	
Content-Disposition	Inline	
Container	<input checked="" type="checkbox"/>	
Rich text	<input checked="" type="checkbox"/>	
Enable Stats Tracking	<input checked="" type="checkbox"/>	
Searchable	<input checked="" type="checkbox"/>	
Cacheable	<input checked="" type="checkbox"/>	
Empty cache	<input checked="" type="checkbox"/>	

- The resource will now appear “published” in the document tree.
- (Hint: You can also Right-Click on the unpublished item in the site tree and choose Publish Resource from the Actions Menu)

VI. Rearranging the Site Structure

Rearranging the Order of Content within a Folder

Once content has been added to your website, you may decide that the order in which it is displayed within a container needs to be modified. You may find that this is useful especially for your navigation elements (top navigation including drop-down menus or side navigation) as well as for bulleted lists created using the Wayfinder snippet or any other code snippet that utilizes the menu index for the sort order (see the separate documentation on a particular snippet for more information).

How Does Menu Index Work?

The “Menu Index” value for a resource is simply a numerical value that can be Zero (0) or any positive integer value. When content is sorted by the Menu Index value (most navigation items use menu index by default), the system looks at all the items within a container and sorts those resources in numerical order based on the menu index.

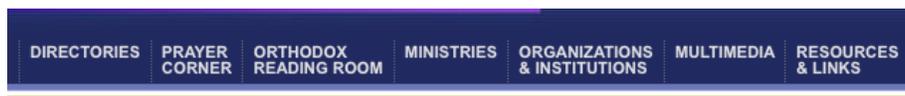
So, if you have six resources – Home (0), Programs (3), Press (4), About (2), News (3), Contact (5) – it will simply place those items in the order – Home, About, News, Programs, Press, Contact. Notice that there were no resources with the value of “1”. This is okay. Menu index doesn’t require that the values be sequential. Also, if two documents have the same value for menu index, these documents are then sub-sorted alphabetically.

Manually Modifying Menu Order



For our example, we will reorder items to take the “Directories” resource (that is currently last in our top navigation) and place it right before the “Prayer Corner” resource. To get started, we will open the “Prayer Corner” resource to determine its menu index.

Next, we will edit the “Directories” resource and see something like the image to the right. Increase or decrease this number so it falls sequentially in the new order you wish to set. Once done, we save the resource and preview it, and we see the resource in the correct order (screenshot below). Additional adjustments may need to be made in case the results aren’t exactly what you expected. Alternatively, you may use a tool within the DocManager.



Using DocManager to Modify Menu Order

Under Modules → DocManager → Sort Menu Items, one can easily sort items. This is the easiest method when doing major resorting. Instructions are available within the DocManager.

Moving Content into Different Folders

You may decide that you would like to rearrange the pages in your website. In other words, you have a resource inside one container, and you would like it moved to another container.

Method 1: Right-click on the document in the document tree, and choose "Move Resource" from the actions menu. In the site tree, select a resource or container where you want the page to be moved into. Click on  in the Action icons.

Method 2: Open the resource for editing. Click on the **Resource Parent** container icon. In the site tree, select a resource in which you want the page to be moved. Click on  in the Action icons.

Resource parent 

Resource parent 

(Hint: To move a resource to the site root, select the Site name (top of the Tree) as the Parent)

VII. Using the Content Editor

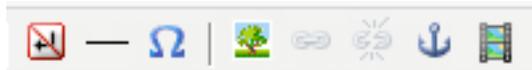
The editor is similar to using Microsoft Word. However there are a few crucial things to remember when working with an HTML editor online.

- **Save your work often!** You WILL remember to do this after you have lost a substantial amount of formatted text from a computer crash or Internet issue.
- **Don't copy and paste from MS Word directly.** There are two preferred methods for copying information from Microsoft Word documents. When pasting into the editor, use either the "Paste as Plain Text" or "Paste from MS Word" options. See below for more information.

There are a number of buttons on the editor's toolbar. Depending on your site configuration, you may see more or fewer buttons on your editor's toolbar. Roll your mouse over the icons to see tool tips. We provide some tips below. (Note: Not every button is described below.)



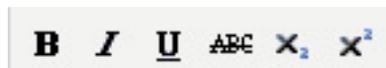
- **Undo** – Undo previous action.
- **Redo** – Repeat previous action.
- **Select All** – Selects all content on the page.
- **Paste as plain text** – Places plain text in the resource.
- **Paste from MS Word** – If you **must** copy from MS Word, use this button.
- **Find, Replace** – Find and replace specific words/items in the resource.



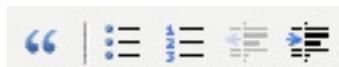
- **Insert non-breaking character** – Inserts a hard break into the resource.
- **Insert Horizontal Ruler** – Add a horizontal line in the resource. It is mainly used for creating breaks/boards in a page and should be used sparingly.
- **Insert Custom Character** – Insert special characters and symbols.
- **Images** – Used to upload and insert images (see Section VIII below).
- **Links** – Inserts internal and external links (see Section IX below).
- **Unlink** – Used to remove links from content.
- **Insert/Edit Anchor** – Used to create and edit fixed locations in the content.
- **Insert/Edit Embedded Media** – Used to insert Flash™, QuickTime™, and other media items into the resource content.



- **Clean Up Messy Code** - This option assists in correcting any abnormalities in the html code placed within the resource.
- **Remove Formatting** – Removes any formatting from the desired location such as tables, text boxes, etc.
- **Toggle to Full Screen mode** - Allows you to open your resource to occupy an entire window rather than only a fixed portion as in the normal resource view.
- **Print** – Prints a copy of the resource.
- **Edit HTML Source** - This allows you to see the HTML code of your resources and enter and remove html commands therein. (Avoid using this unless you are familiar with the HTML language)
- **Help** - Opens a window with helpful instructions concerning the editor.



- **Bold** – Enables and disables bold font
- *Italics* – Enables and disables the italic font
- Underline – Enables and disables underlining of text
- ~~Strikethrough~~ – Enables and disables the strikethrough option for text
- ^{Subscript} – Enables and disables the subscript option for text
- _{Superscript} – Enables and disables the superscript option for text



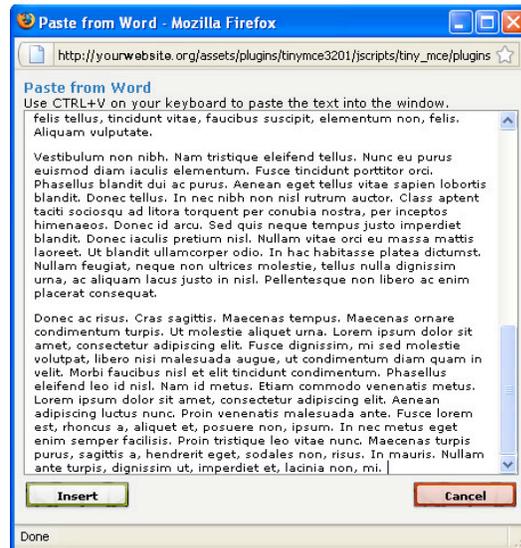
- **Blockquote** – Enables the block quote function for text
- **Unordered List** – Enables the creation of bulleted lists
- **Ordered List** – Enables the creation of numerical lists
- **Outdent** – Enables you to move text outward a specified distance
- **Indent** – Enables you to move text inward a specified distance



- **Align Left** – Moves selected text to the extreme left
- **Align Center** – Moves selected text to the center
- **Align Right** – Moves selected text to the extreme right
- **Align Full** – Spreads selected text to fill margins fully

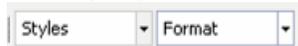
Pasting Text for Microsoft Word

- If you do paste from Word, use the  button.
- This will open the following dialog:
- Paste the selected text into the box and then click insert to import the desired text into the documentation.
- Alternatively, you can also import text by pasting the MS Word text into the paste as plain text window. (**Very important!** Do not directly paste from MS Word into the content of your resource.)



Heading Styles

You should use the Format dropdown to style your text.



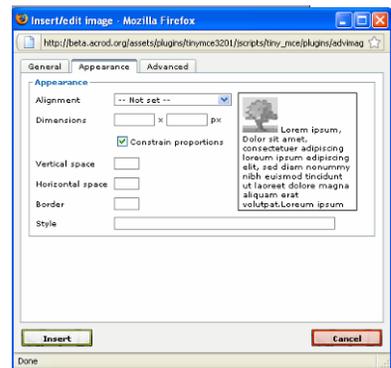
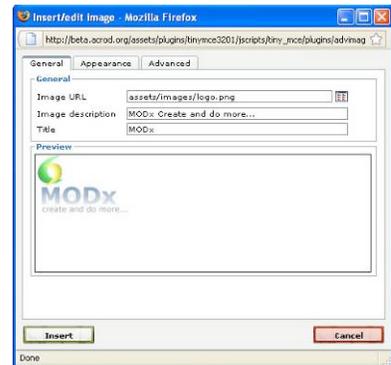
- Select the text you want to style.
- Select the style you want to apply from the style dropdown.
- To reset to standard text, select Normal. If a style is not changing, try toggling it to another style and back again.
- Select the Format dropdown window
- Select the effect that you want to apply to your resource.

Edit CSS Styles

The  button allows you to manipulate many aspects of your resource through CSS. In general, it is a very good idea to leave this section alone unless you have knowledge in the use of the CSS Styles.

VIII. Inserting an Image

- While in the WYSIWYG Content Editor, click on 
- This will open the dialog to the right:
- Click the Browse Server Button .
- If the image needs to be uploaded, click “Browse” at the bottom of the window. Next, choose the image from your local computer. Then click “Upload”. It will now appear in the Resource Browser.
- Click on the image you want to insert.
- You will be brought to the first dialog box. Type an image description.
- Before you insert the desired picture into your resource you will need to select the appearance tab.
- Once you have selected the Appearance tab you will be able to pick the position of the picture in the resource as well as vertical and horizontal padding around the picture. (Keep in mind the units of the spacing are in pixels not inches.)
- After the appropriate modifications, click insert.
- If you need to upload at the same time, then click Upload first and select the image to upload (ensure it is .gif, .jpg. or .png and optimized for the web) (see usable image description below)



Usable Image Types

You can only use PNG, GIF or JPG images in a web page.

- You can use most photo-editing software to convert TIF or BMP images to JPG or GIF. You can even use the very basic Paint program in Windows to save as JPG or GIF format.
- Check that the JPG or GIF images are not too large. You can see the size in the image editor. You should look for the width dimensions in pixels (px).
- If you have multiple images on a page e.g. product images, they should be the same width for design consistency. This should not be more than 300px, and in most cases would be between 100-200px. Ask your web developer for the standard image size for your website.

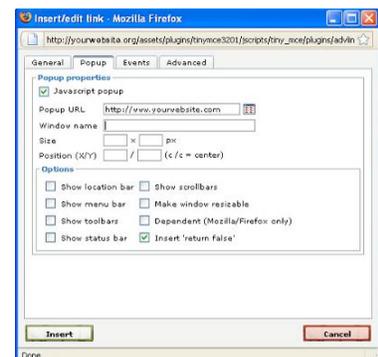
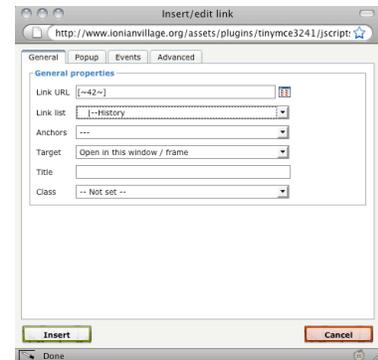


IX. Inserting Links

There are two types of links – those within the body content of a page and those that are content items themselves (Weblinks). The latter is useful for navigation items, auto-generated bulleted lists, etc. As you get more comfortable using MODx, this distinction will become clear.

Inserting a Link as Body Content in a Resource

- Edit a page and scroll down to the Resource Content section
- Select and highlight the text that you would like to place a link.
- Click on the  button.
- The dialog to the right will appear:
- To link externally just type the URL for the site into the URL box.
- To link internally, MODx also has a special tag to use for referring to internal resources. It takes the form [~#~], where # is the ID of the resource you wish to link.
- You can also create and internal anchor with the form [~#~]#anchor.
- To make the link appear in a new window, set the target as "_blank"
- To create a JavaScript popup link, select the Popup tab in the link dialog; fill out the desired URL, title the popup, the size you'd like the popup to be, and then click on the insert button.

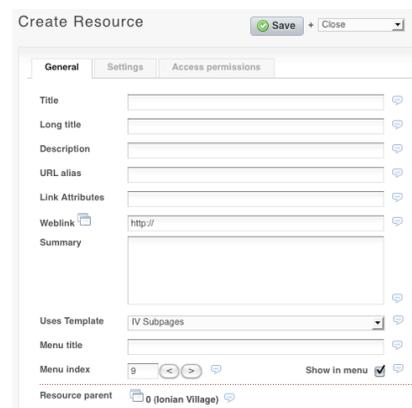


Creating Links to PDF Documents

- When inserting/editing a link (in the steps above), click on the  button next to the Link URL field to enter the Resources Browser.
- Click on browse to choose and upload a PDF from your local computer.
- Next, click Upload. The PDF will now appear in your resource browser.
- Click on the PDF to select it, which will fill in the Link URL field with your PDF's location.
- Click Insert to complete this process.

Creating a Weblink as a Content Item

- Right-click on a piece of content and choose "Create Weblink here" from the Actions menu.
- The dialog to the right will appear:
- Enter the title, Long Title, Resource's alias, etc as you would in a normal document.
- For Weblink, you have three options:
 - Click on the  graphic and click on a resource in the document tree to link to an internal page
 - Type a full URL to an external webpage
 - Type the relative path to a file on your website (ex. /assets/files/mydoc.pdf)
- Click 



X. Managing Files

You can upload content (e.g. PDF files and image files) using an FTP application or the MODx built-in **File Manager**. Images can also be uploaded using the Image icon on the document editor toolbar. If you are using FTP, you should transfer files to the appropriate place in the **/assets** folder. For example:

- Transfer images to the **/assets/images** folder.
- Transfer PDF files to the **/assets/files** folder.

Uploading Files and Images While Editing a Page

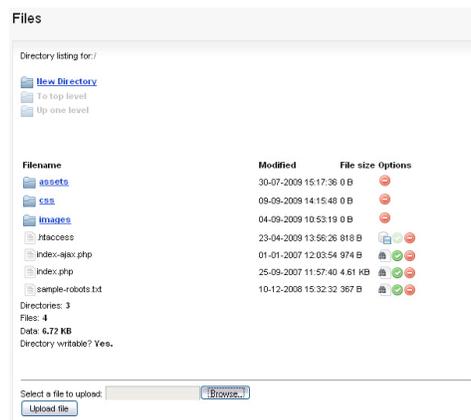
This method allows you to upload resources to your website as you need them in your documents. This method for uploading files has already been discussed previously in this manual. **NOTE: This is the Preferred Method!**

Uploading Files and Images With File Manager

To upload files and images:



- Click on **Manage Files** under the Elements tab in the Admin menu. The File manager will open.



- Click **Browse** to locate your file on your local PC, then click **Upload file**.

XI. Utilizing the Homepage News Slider

Description

The Nivo Slider is a utility we use in MODx to help your parish display content visually on your site. Using a combination of images and text, you are able to highlight announcements, events, and more on your parish's home page.



Create Graphic

Any graphic or photo used in the slider must be the exact size or else your website will appear broken and unprofessional. This is because Nivo slider's current version won't auto-resize images. See the list below for the proper image size based on your parish's template:

1. T001, T002: 512x288px
2. T003:480x320px
3. T004:720x480px
4. T005, T006, T007: 1000x480px
5. T008, T009: 640x480px

You may either create a graphic with overlaid text using photo editing software (i.e. Adobe Photoshop) or just crop a photograph or graphic to the proper size and let the slider overlay text for you.

As a good rule of thumb, if the graphic you are posting has text already on it that is descriptive enough for your site visitors, then there is no need to overlay text through the slider.

Resizing Images

1. Windows - <http://windows.microsoft.com/en-us/windows-xp/help/digitalphotography/resize-digital-pictures>
2. Mac - <http://www.makeuseof.com/tag/easy-ways-resize-photos-mac/>

Add Item to Website

1. Login to the website manager
2. In the document tree to the left, expand the Homepage Elements directory and then expand the Homepage News Slider directory.
3. By clicking on the icon displayed to the left of Homepage News Slider in the document tree, select Create Weblink here from the menu.
4. To create a slider posting with a text overlay make the following edits on the Edit Resource screen:
5. Title: Give your item a descriptive (but brief) title. (Required)
6. Template Variables: Click the Insert button to choose an image through the Resources Browser to post in the slider. You may also upload an image through the Resources Browser into the slider directory from your computer. (Required)

Edit Resource

General Settings

Title: Veterans Memorial

Page heading: Veterans Memorial

Search engine description:

URL alias: veterans-memorial

Weblink: 1

Summary (introtex): Our parish will gather following the Divine Liturgy for a prayer service for our brethren who have fallen in war.

Uses Template: Homepage Slider Photos

Menu title: Veterans Memorial

Menu index: 1 Show in menu

Resource parent: 33 (Homepage News Slider)

Template Variables

Spotlight Image: assets/images/slider/mg_samp2_990w.jpg

Looks for images for the homepage slider in a particular directory.

Optional Fields:

1) Weblink: So your visitors can click on your slider image or text and be brought to another page, use the weblink box. To link to an internal page, enter the ID of that page here. To link to an external page, enter in the complete web address (must begin with <http://>). If you leave this field blank, it will simply display the graphic on its own that is unclickable.



2) Long Title: If a value is entered here, a gray semi-transparent bar will be visible at the bottom of the graphic and the long title will be displayed there.

3) Summary: If a value is entered here, a gray semi-transparent bar will be visible at the bottom of the graphic and the summary will be displayed there. You may use up to two descriptive (but brief) lines of text.

An Administrator's Quick Start Guide to MODx

Security Management

Site	Elements	Modules	Security	Tools	Reports
Manager Users	Web Users	Roles	Manager Permissions	Web Permissions	

MODx offers a useful set of tools for managing permissions for content and users within your website. Security can be broken down into two categories:

- Manager Users – regarding access to content at <http://yourwebsite/manager>
- Web Users – regarding access to content on the public side of the site

In this manual, we will focus solely on various applications of dealing with permissions on the Manager side of your site. If you wish to do work with security on the public side of your site, there are additional resources online that will assist you with this process.

Determining Appropriate Security Strategy for your Site

Before you begin developing your website within MODx, you should work to answer the following questions:

1. Who are the people who will be working on the website?
2. What sections should they have be given access to edit?
3. What sections should be restricted for only admins?
4. What roles will these people play in contributing to the site (rights to add, edit, delete, and publish content as well as additional administrative duties)?

Once you have asked yourself these questions, you can then begin to build up your security strategy for your website.

Roles

Roles help determine global permissions to the manager. Here are some examples of roles that can be created:

- *Administrator* – full access to site
- *Developer* – will create the code used in special applications. Will handle modules, plug-ins, snippets, and TVs
- *Designer* – will be responsible for the overall look and layout of the site's pages. Will work with templates, chunks, and CSS.
- *Power User* – content editor plus ability to edit chunks, etc.
- *Content Manager* – responsible for pages. Can edit, create, delete, and publish
- *Content Editor* – will be able to edit, but not create or delete documents.

Document and User Groups

Document and User Groups are used in tandem to give your manager users access to certain content on your site. You may wish to restrict certain users to be able to manage only one folder of content.

Users can exist in multiple User Groups, and User Groups can be associated with multiple Document Groups.

To see a practical example of the document groups, user groups, and roles all working together, see the following chart:

Document Group	User Group	Role	Example User
n/a	n/a	Administrator	Webmaster
News, About, Ministries	All Documents	Power User	Asst. Webmaster
News Documents	News Editors	Content Manager	Parish Secretary
Priest's Messages	Clergy	Content Manager	Parish Priest
GOYA	GOYA	Content Editor	GOYA President

The above chart is, of course, just an example, but hopefully helps illustrate the differences between Doc Groups, User groups, and Roles.

Manager Users

It is recommended that every person who will be responsible for updating your website have his or her own user account.

- Click on Manager Users under the Security Tab in the Admin menu.

Click on the  button. This will open the new user dialog.

- Enter the Username. (This will be the new user's login ID)
- Enter the Password for the user.
- Enter the User's Full name and email address
- **IMPORTANT: Assign the user the appropriate role for their desired access to the website i.e. Administrator, Content Editor, Proofreader, etc.**

Make certain you have checked all the relevant information for the new user and then click  to create the profile.

Manager Elements

The power of MODx is found in its unlimited potential within the elements section. Go to:
Elements -> Manager Elements

Templates

Templates are the HTML code which determine the layout and appearance of your site. The power of templates is including MODx specific tags to add functionality to your site.

Template Variables

A Template Variable (TV) is an extra or custom Resource Field that is created by the site developer. A TV is used or displayed (via a Content Tag) to represent a value inside a template or a document. There are also built in Template Variables (such as [*content*] or [*longtitle*]).

Chunks

Chunks are useful for reusing blocks HTML on your site. Chunks cannot contain any logic directly, although they can contain calls to Snippets that do contain logic. Chunks are also used by Snippets for reusable templates.

Usage:

<code>{{chunkName}}</code>	<code>[[snippetName? &tpl=`chunkName`]]</code>
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Snippets

Snippets are useful for adding logic to websites. They can be used to create menus, determine who is logged in, or any other thing possible with the API. Double brackets enables caching. Bracket with Exclamation point forces the snippet to execute every time and ignores any cached content.

Usage:

<code>[[snippetName]]</code>	<code>![snippetName!]</code>	<code>[[snippetName? &param=`value`]]</code>
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