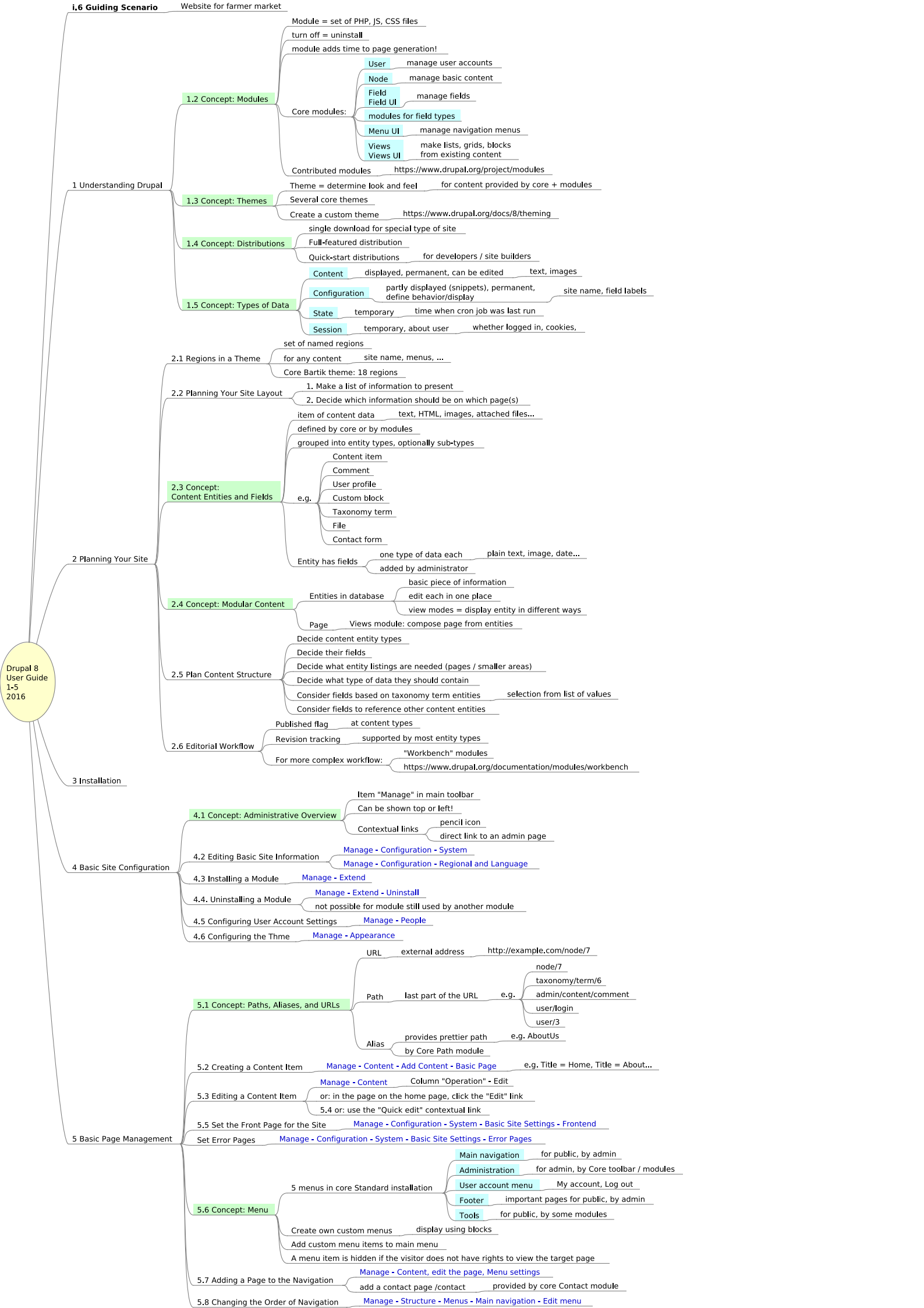
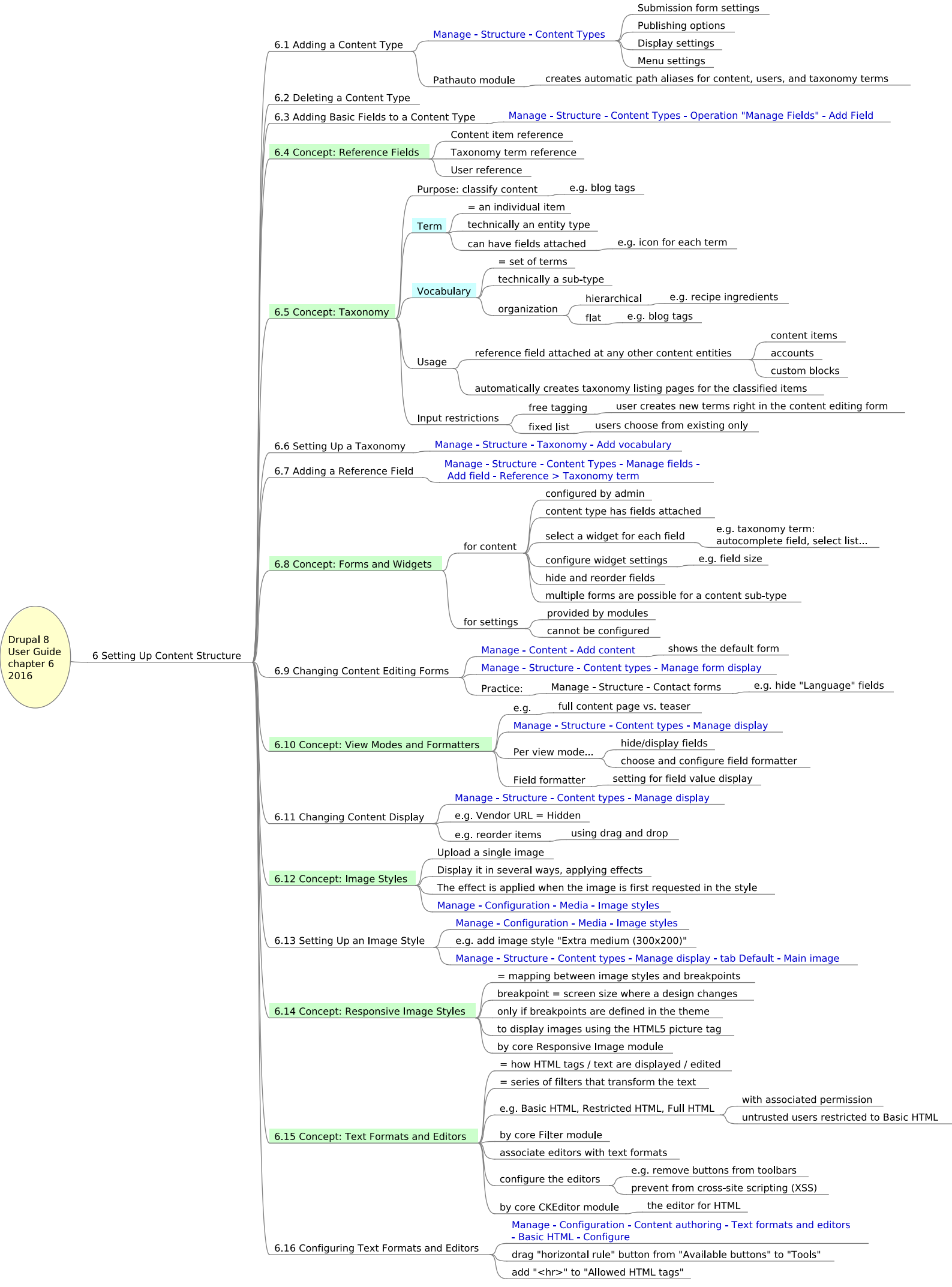
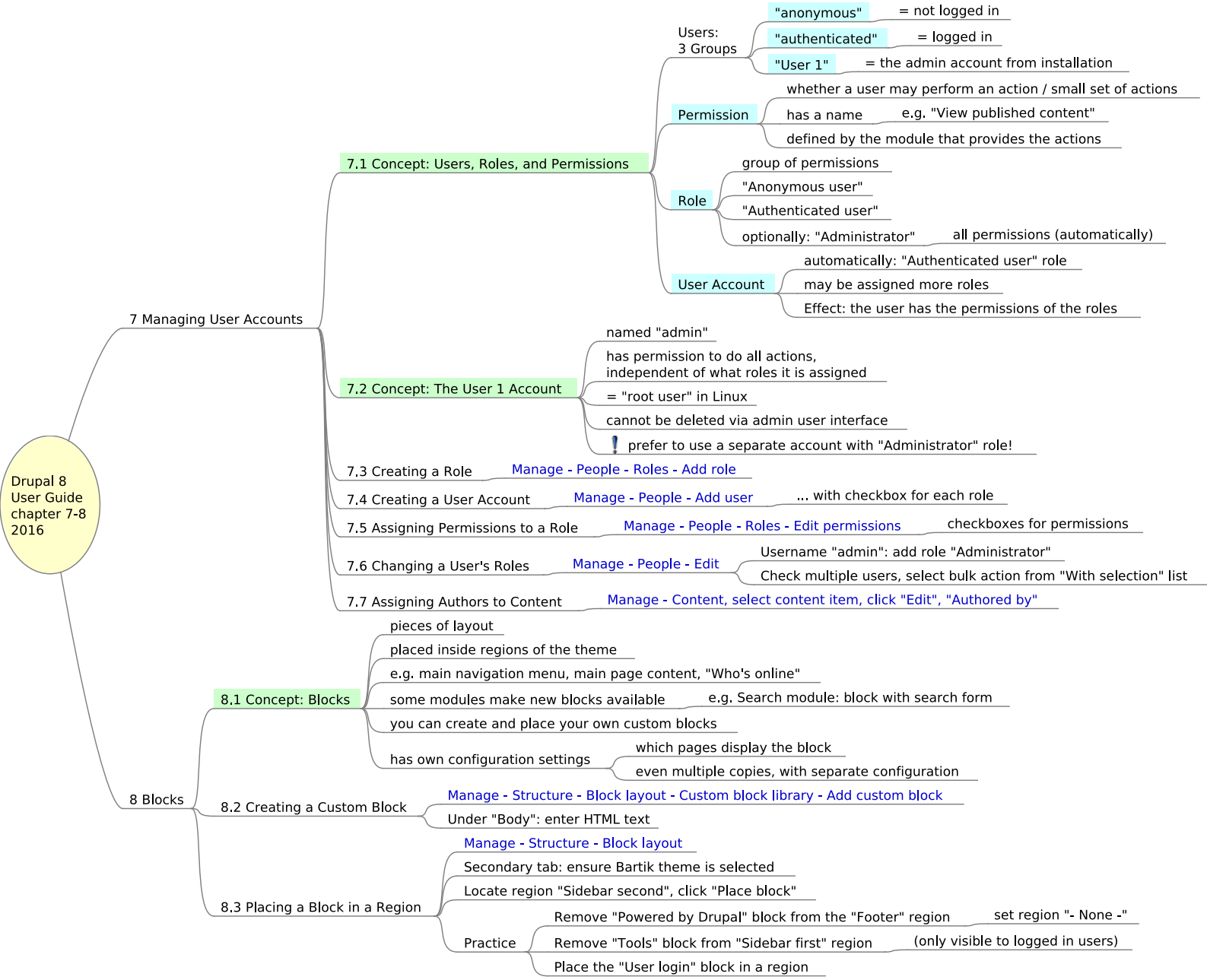
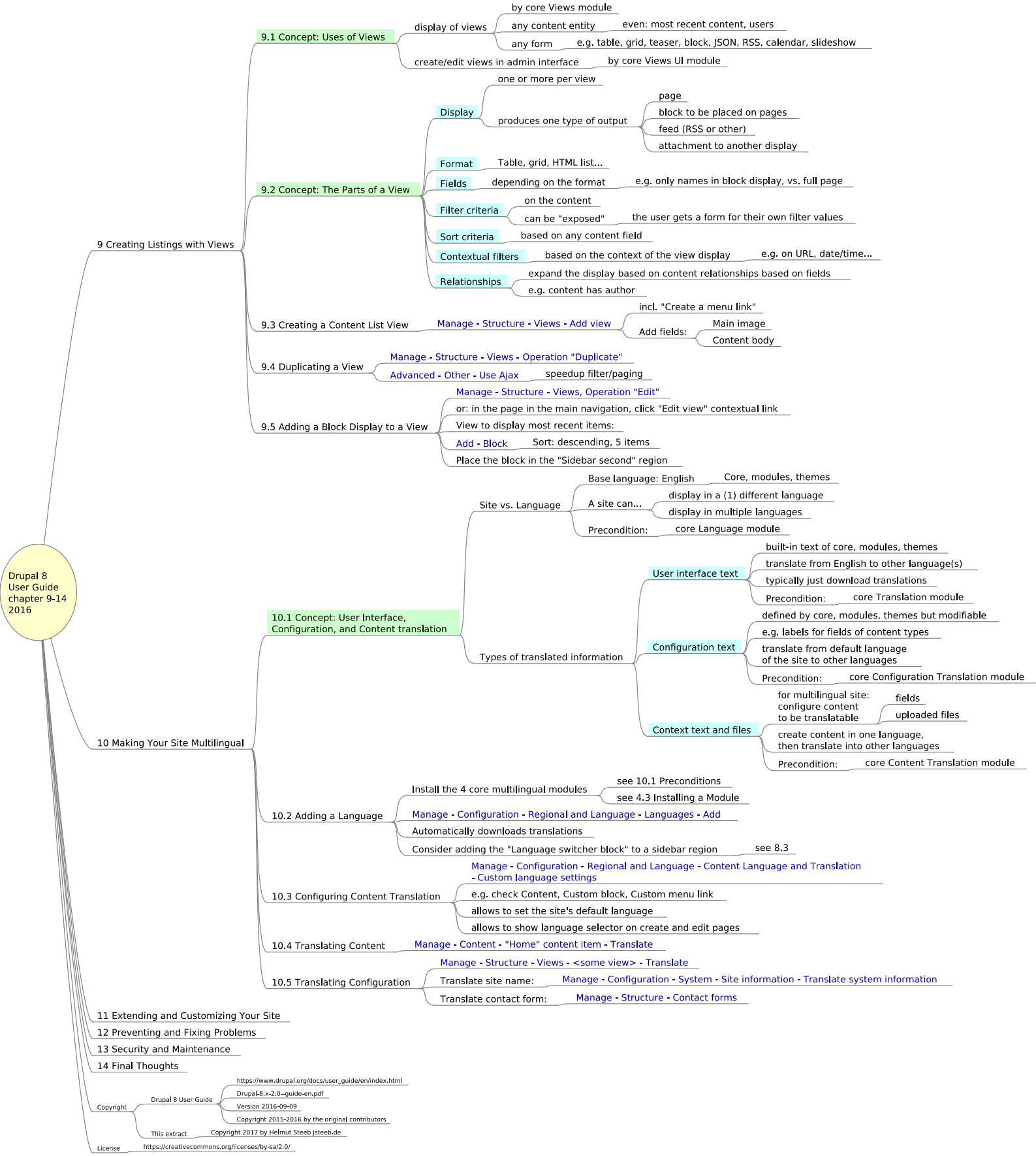

Drupal 8
User Guide
1-5
2016
i.6 Guiding Scenario
Website for farmer market
1 Understanding Drupal
1.2 Concept: Modules
Module = set of PHP, JS, CSS files
turn off = uninstall
module adds time to page generation!
Core modules:
User
manage user accounts
Node
manage basic content
Field
Field UI
manage fields
modules for field types
Menu UI
manage navigation menus
Views
Views UI
make lists, grids, blocks
from existing content
Contributed modules
https://www.drupal.org/project/modules
1.3 Concept: Themes
Theme = determine look and feel
for content provided by core + modules
Several core themes
Create a custom theme
https://www.drupal.org/docs/8/theming
1.4 Concept: Distributions
single download for special type of site
Full-featured distribution
Quick-start distributions
for developers / site builders
1.5 Concept: Types of Data
Content
displayed, permanent, can be edited
text, images
Configuration
partly displayed (snippets), permanent,
define behavior/display
site name, field labels
State
temporary
time when cron job was last run
Session
temporary, about user
whether logged in, cookies,
2 Planning Your Site
2.1 Regions in a Theme
set of named regions
for any content
site name, menus, ...
Core Bartik theme: 18 regions
2.2 Planning Your Site Layout
1. Make a list of information to present
2. Decide which information should be on which page(s)
2.3 Concept:
Content Entities and Fields
item of content data
text, HTML, images, attached files...
defined by core or by modules
grouped into entity types, optionally sub-types
e.g.
Content item
Comment
User profile
Custom block
Taxonomy term
File
Contact form
Entity has fields
one type of data each
plain text, image, date...
added by administrator
2.4 Concept: Modular Content
Entities in database
basic piece of information
edit each in one place
view modes = display entity in different ways
Page
Views module: compose page from entities
2.5 Plan Content Structure
Decide content entity types
Decide their fields
Decide what entity listings are needed (pages / smaller areas)
Decide what type of data they should contain
Consider fields based on taxonomy term entities
selection from list of values
Consider fields to reference other content entities
2.6 Editorial Workflow
Published flag
at content types
Revision tracking
supported by most entity types
For more complex workflow:
"Workbench" modules
https://www.drupal.org/documentation/modules/workbench
3 Installation
4 Basic Site Configuration
4.1 Concept: Administrative Overview
Item "Manage" in main toolbar
Can be shown top or left!
Contextual links
pencil icon
direct link to an admin page
4.2 Editing Basic Site Information
Manage - Configuration - System
Manage - Configuration - Regional and Language
4.3 Installing a Module
Manage - Extend
4.4. Uninstalling a Module
Manage - Extend - Uninstall
not possible for module still used by another module
4.5 Configuring User Account Settings
Manage - People
4.6 Configuring the Thme
Manage - Appearance
5 Basic Page Management
5.1 Concept: Paths, Aliases, and URLs
URL
external address
http://example.com/node/7
Path
last part of the URL
e.g.
node/7
taxonomy/term/6
admin/content/comment
user/login
user/3
Alias
provides prettier path
by Core Path module
e.g. AboutUs
5.2 Creating a Content Item
Manage - Content - Add Content - Basic Page
e.g. Title = Home, Title = About...
5.3 Editing a Content Item
Manage - Content
Column "Operation" - Edit
or: in the page on the home page, click the "Edit" link
5.4 or: use the "Quick edit" contextual link
5.5 Set the Front Page for the Site
Manage - Configuration - System - Basic Site Settings - Frontend
Set Error Pages
Manage - Configuration - System - Basic Site Settings - Error Pages
5.6 Concept: Menu
5 menus in core Standard installation
Main navigation
for public, by admin
Administration
for admin, by Core toolbar / modules
User account menu
My account, Log out
Footer
important pages for public, by admin
Tools
for public, by some modules
Create own custom menus
display using blocks
Add custom menu items to main menu
A menu item is hidden if the visitor does not have rights to view the target page
5.7 Adding a Page to the Navigation
Manage - Content, edit the page, Menu settings
add a contact page /contact
provided by core Contact module
5.8 Changing the Order of Navigation
Manage - Structure - Menus - Main navigation - Edit menu


Drupal 8 User Guide chapter 6 2016
6 Setting Up Content Structure
6.1 Adding a Content Type
Manage - Structure - Content Types
Submission form settings
Publishing options
Display settings
Menu settings
Pathauto module
creates automatic path aliases for content, users, and taxonomy terms
6.2 Deleting a Content Type
6.3 Adding Basic Fields to a Content Type
Manage - Structure - Content Types - Operation "Manage Fields" - Add Field
6.4 Concept: Reference Fields
Content item reference
Taxonomy term reference
User reference
6.5 Concept: Taxonomy
Purpose: classify content
e.g. blog tags
Term
= an individual item
technically an entity type
can have fields attached
e.g. icon for each term
Vocabulary
= set of terms
technically a sub-type
organization
hierarchical
e.g. recipe ingredients
flat
e.g. blog tags
Usage
reference field attached at any other content entities
content items
accounts
custom blocks
automatically creates taxonomy listing pages for the classified items
Input restrictions
free tagging
user creates new terms right in the content editing form
fixed list
users choose from existing only
6.6 Setting Up a Taxonomy
Manage - Structure - Taxonomy - Add vocabulary
6.7 Adding a Reference Field
Manage - Structure - Content Types - Manage fields - Add field - Reference > Taxonomy term
6.8 Concept: Forms and Widgets
for content
configured by admin
content type has fields attached
select a widget for each field
e.g. taxonomy term: autocomplete field, select list...
configure widget settings
e.g. field size
hide and reorder fields
multiple forms are possible for a content sub-type
for settings
provided by modules
cannot be configured
6.9 Changing Content Editing Forms
Manage - Content - Add content
shows the default form
Manage - Structure - Content types - Manage form display
Practice:
Manage - Structure - Contact forms
e.g. hide "Language" fields
6.10 Concept: View Modes and Formatters
e.g.
full content page vs. teaser
Manage - Structure - Content types - Manage display
Per view mode...
hide/display fields
choose and configure field formatter
Field formatter
setting for field value display
6.11 Changing Content Display
Manage - Structure - Content types - Manage display
e.g. Vendor URL = Hidden
e.g. reorder items
using drag and drop
6.12 Concept: Image Styles
Upload a single image
Display it in several ways, applying effects
The effect is applied when the image is first requested in the style
Manage - Configuration - Media - Image styles
6.13 Setting Up an Image Style
Manage - Configuration - Media - Image styles
e.g. add image style "Extra medium (300x200)"
Manage - Structure - Content types - Manage display - tab Default - Main image
6.14 Concept: Responsive Image Styles
= mapping between image styles and breakpoints
breakpoint = screen size where a design changes
only if breakpoints are defined in the theme
to display images using the HTML5 picture tag
by core Responsive Image module
6.15 Concept: Text Formats and Editors
= how HTML tags / text are displayed / edited
= series of filters that transform the text
e.g. Basic HTML, Restricted HTML, Full HTML
with associated permission
untrusted users restricted to Basic HTML
by core Filter module
associate editors with text formats
configure the editors
e.g. remove buttons from toolbars
prevent from cross-site scripting (XSS)
by core CKEditor module
the editor for HTML
6.16 Configuring Text Formats and Editors
Manage - Configuration - Content authoring - Text formats and editors - Basic HTML - Configure
drag "horizontal rule" button from "Available buttons" to "Tools"
add "<hr>" to "Allowed HTML tags"


Drupal 8
User Guide
chapter 7-8
2016
7 Managing User Accounts
7.1 Concept: Users, Roles, and Permissions
Users:
3 Groups
"anonymous"
= not logged in
"authenticated"
= logged in
"User 1"
= the admin account from installation
Permission
whether a user may perform an action / small set of actions
has a name
e.g. "View published content"
defined by the module that provides the actions
Role
group of permissions
"Anonymous user"
"Authenticated user"
optionally: "Administrator"
all permissions (automatically)
User Account
automatically: "Authenticated user" role
may be assigned more roles
Effect: the user has the permissions of the roles
7.2 Concept: The User 1 Account
named "admin"
has permission to do all actions,
independent of what roles it is assigned
= "root user" in Linux
cannot be deleted via admin user interface
prefer to use a separate account with "Administrator" role!
7.3 Creating a Role
Manage - People - Roles - Add role
7.4 Creating a User Account
Manage - People - Add user
... with checkbox for each role
7.5 Assigning Permissions to a Role
Manage - People - Roles - Edit permissions
checkboxes for permissions
7.6 Changing a User's Roles
Manage - People - Edit
Username "admin": add role "Administrator"
Check multiple users, select bulk action from "With selection" list
7.7 Assigning Authors to Content
Manage - Content, select content item, click "Edit", "Authored by"
8 Blocks
8.1 Concept: Blocks
pieces of layout
placed inside regions of the theme
e.g. main navigation menu, main page content, "Who's online"
some modules make new blocks available
e.g. Search module: block with search form
you can create and place your own custom blocks
has own configuration settings
which pages display the block
even multiple copies, with separate configuration
8.2 Creating a Custom Block
Manage - Structure - Block layout - Custom block library - Add custom block
Under "Body": enter HTML text
8.3 Placing a Block in a Region
Manage - Structure - Block layout
Secondary tab: ensure Bartik theme is selected
Locate region "Sidebar second", click "Place block"
Practice
Remove "Powered by Drupal" block from the "Footer" region
set region "- None -"
Remove "Tools" block from "Sidebar first" region
(only visible to logged in users)
Place the "User login" block in a region


Drupal 8
User Guide
chapter 9-14
2016
9 Creating Listings with Views
9.1 Concept: Uses of Views
display of views
by core Views module
any content entity
even: most recent content, users
any form
e.g. table, grid, teaser, block, JSON, RSS, calendar, slideshow
create/edit views in admin interface
by core Views UI module
9.2 Concept: The Parts of a View
Display
one or more per view
produces one type of output
page
block to be placed on pages
feed (RSS or other)
attachment to another display
Format
Table, grid, HTML list...
Fields
depending on the format
e.g. only names in block display, vs. full page
Filter criteria
on the content
can be "exposed"
the user gets a form for their own filter values
Sort criteria
based on any content field
Contextual filters
based on the context of the view display
e.g. on URL, date/time...
Relationships
expand the display based on content relationships based on fields
e.g. content has author
9.3 Creating a Content List View
Manage - Structure - Views - Add view
incl. "Create a menu link"
Add fields:
Main image
Content body
9.4 Duplicating a View
Manage - Structure - Views - Operation "Duplicate"
Advanced - Other - Use Ajax
speedup filter/paging
9.5 Adding a Block Display to a View
Manage - Structure - Views, Operation "Edit"
or: in the page in the main navigation, click "Edit view" contextual link
View to display most recent items:
Add - Block
Sort: descending, 5 items
Place the block in the "Sidebar second" region
10 Making Your Site Multilingual
10.1 Concept: User Interface, Configuration, and Content translation
Site vs. Language
Base language: English
Core, modules, themes
A site can...
display in a (1) different language
display in multiple languages
Precondition:
core Language module
Types of translated information
User interface text
built-in text of core, modules, themes
translate from English to other language(s)
typically just download translations
Precondition:
core Translation module
Configuration text
defined by core, modules, themes but modifiable
e.g. labels for fields of content types
translate from default language
of the site to other languages
Precondition:
core Configuration Translation module
Context text and files
for multilingual site:
configure content
to be translatable
fields
uploaded files
create content in one language,
then translate into other languages
Precondition:
core Content Translation module
10.2 Adding a Language
Install the 4 core multilingual modules
see 10.1 Preconditions
see 4.3 Installing a Module
Manage - Configuration - Regional and Language - Languages - Add
Automatically downloads translations
Consider adding the "Language switcher block" to a sidebar region
see 8.3
10.3 Configuring Content Translation
Manage - Configuration - Regional and Language - Content Language and Translation
- Custom language settings
e.g. check Content, Custom block, Custom menu link
allows to set the site's default language
allows to show language selector on create and edit pages
10.4 Translating Content
Manage - Content - "Home" content item - Translate
10.5 Translating Configuration
Manage - Structure - Views - <some view> - Translate
Translate site name:
Manage - Configuration - System - Site information - Translate system information
Translate contact form:
Manage - Structure - Contact forms
11 Extending and Customizing Your Site
12 Preventing and Fixing Problems
13 Security and Maintenance
14 Final Thoughts
Copyright
Drupal 8 User Guide
https://www.drupal.org/docs/user_guide/en/index.html
Drupal-8.x-2.0-guide-en.pdf
Version 2016-09-09
Copyright 2015-2016 by the original contributors
This extract
Copyright 2017 by Helmut Steeb jsteeb.de
License
https://creativecommons.org/licenses/by-sa/2.0/