Getting Started with Drupal: Workbook

PANTHEON

The WebOps Platform Built for Agility

Your Sandbox

We're going to be setting up our sandboxes on Pantheon. Once your sandbox is set up, you'll want to write down the URL, username, and password so that you can refer to it later. Sandboxes are not deleted, so you should be able to refer back to this any time you want to see what you did.

Sandbox URL: _____ **. pantheonsite.io**

Drupal Username: _____

Drupal Password: _____

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Exercise 1: Creating the Drupal 8 Sandbox

If you prefer to work locally, you can install Drupal on your computer. There are many benefits to working locally, but for the sake of simplicity and convenience we are setting up the website on Pantheon. And yes, we're creating a Drupal 8 site, even though this class is about Drupal 9. Everything is identical, but Drupal 8 is much easier to set up right now. This will probably be better by the next time we offer this course.

Creating the sandbox

1. Visit: **dashboard.pantheon.io/sites/create**.

2. Enter your account information and click the **Login** button.

   *(Don't have a Pantheon login? Click **Create free account** in the upper right corner.)*

3. Use unique info for the **Name Your Pantheon Site** and field and click **Continue**.

   *(If you're not sure, try something like **Drupal101** followed by your last name.)*

4. On the Choose Your CMS screen, find the Drupal 8 section and click the **Deploy** button.

5. Click the **Visit your Pantheon Site Dashboard** button once the process completes (2-3 minutes).

6. Click the **Visit Development Site** button to open a new window and begin the Drupal installation.

7. **English** should already be selected. Click the **Save and continue** button.

8. **Standard** should already be selected. Click the **Save and continue** button.

9. Enter your **Site name** and your actual email for the **Site e-mail address**.

10. For the **username** and **password** enter something you will not forget.

    (If you enter your real email address and forget your username or password later, you can reset it.)

11. Choose your appropriate **default country** and **timezone**.

12. Make sure that **Check for updates automatically** is checked. You may uncheck the box to receive email notifications if you like.

13. Click the **Save and continue** button to proceed to your installed site.

Frequently Asked Questions

Q: If I forget my URL, username or password later can you reset it for me?
Q: Is this my own site? When will it be deleted? Can I make it my own?
Q: What if my company or organization doesn't use Pantheon?

✔ **You have completed Exercise 1.**

Exercise 2: Creating Content

Out of the box, a brand new Drupal site gives you two different types of content to work with: *Article* & *Basic page*. How exactly are those types of content different? Let's find out.

Creating an *Article*

1. Click **Content** in the administration menu (upper left corner of the page).

2. Click **+ Add content** and select **Article**.

3. Populate the fields: **Title**: My first article and **Body**: This content was created via the article content type. Articles are often used for blog posts, news articles, etc.

4. Add some **tags**. (such as Learning Drupal, Testing, Demo, etc)

5. Upload an **Image**. Make sure you always fill in the Alternative text to properly describe the picture for any visually impaired users.

6. Click the **Save** button.

Creating a *Basic page*

7. Click **Content** in the administration menu (upper left corner of the page).

8. Click **+ Add content** and select **Basic page**.

9. Populate the fields: **Title**: About us and **Body**: We're learning all about Drupal.

10. On the right-hand side, click **MENU SETTINGS** and check the box to **Provide a menu link**

11. Click the **Save** button.

Frequently Asked Questions

Q: Where can I view all content on the site?

Your Turn

Articles and *Basic pages* are subtly different. Can you spot THREE things that are different between your newly created content of each type?

1. _____

2. _____

3. _____

✔ **You have completed Exercise 2.**

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Exercise 3: Content Types

Consider where certain types of content will appear on your site and what types of content may be grouped together in lists. A *news* page may work just like a *blog* page and allow us to share the existing *Article* content type. But *testimonial* content will have different fields and be displayed in significantly different ways. For those reasons, we should add a new content type called *Testimonial*.

Adding the *Testimonial* content type

1. Click **Structure** in the administration menu, followed by **Content types**.

2. Click **+Add content type** and give our new content type a **Name:** Testimonial .

3. Describe what it will be used for: **Description:** Testimonials let people talk about us.

4. Change the **Title field label** to: Full name .

5. Click on **Publishing options** to the left and uncheck ☐ **Promoted to front page**.

6. Click on **Display settings** to the left and uncheck ☐ **Display author and date information**.

7. Click on **Menu settings** to the left and uncheck ☐ **Main navigation**.

8. Click **Save and manage fields**.

Adding fields to *testimonial* content

9. Click the **+Add field** button.

10. Within the **Add a new field** select box choose **Text (plain)**.

11. Add the **Label:** Organization.

12. Click the **Save and continue** button.

13. This will drop you into the **Field settings** tab. Leave these fields as is, since we only want one organization per Testimonial.

14. Click the **Save field settings** button.

15. Let's help users by adding **Help Text**: What organization is writing this testimonial?

16. Click the **Save settings** button.

17. Click the **Manage form display** tab at the top of the page.

Keep going to the next page ☞

18. Use the *multi-directional arrow* to the left to drag-and-drop the **Full name** field below the *Body*.

19. Click the **Save** button.

20. Create at least THREE individual testimonials.

    *(Here's a hint: **Content, + Add new content, Testimonial**.)*

Frequently Asked Questions

Q: Can I add any field to any content type? What about an image? What about a link field?

✔ **You have completed Exercise 3.**

Need a break? How about a surprise Drupal + Pantheon word search?

```
X D L E I F O C D H M S P V H T Y W E B O P S
F S Y N F L I V E W O R K S H O P S Q Z B R N
U W M N H A R T I C L E B L J Z O I F N C G G
C E O J A H U M O D U L E G I W T X J H R C L
A I N C O M P O S E R M R U B L O C K O S O B
C V O K H B I X K M H A E L T H E M E X E N N
H N X Y L D K C O N F I G U R A T I O N G T P
E J A B D L I O L W L I I T W S D I E L A E A
D K T D Q N Q O E I R I O O N R A R A J P N N
S Y M F O N Y O M S S U N T I R N P Z Y C T T
Q U I C K S I L V E R T U E E O U D O T I T H
F B G P S B Z A F K N Z S S D R Q R Y I S Y E
J H S U R D F T T D U F U E D M E B K T A P O
P H P P Z G T X W P T E R M I N U S O N B E N
R E D L I U B T U O Y A L Z Y O U J H E P S Z
```

PANTHEON	DRUPAL	FIELD	CONTENT TYPE
BASIC PAGE	ARTICLE	CONFIGURATION	COMPOSER
TAXONOMY	BLOCK	THEME	MODULE
LAYOUT BUILDER	ENTITY	NODE	REGION
TWIG	DRIES	PHP	SYMFONY
CACHE	LIVE WORKSHOPS	TERMINUS	QUICKSILVER
DRUSH	USERS	DYNAMIC LISTS	VIEWS

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Exercise 4: Views

Now that we have *testimonial* content, we need a way to create lists of testimonials for people to see when visiting our website. For building lists of content, we use a wonderful module named *Views*.

Creating our first *view*

1. Click **Structure** in the administration menu, followed by **Views**.

2. Click **+ Add view** and set the **View name:** Testimonials .

3. Under VIEW SETTINGS: **Show:** Content **of type:** Testimonial **sorted by:** Newest first.

4. We would like to ☑**Create a page**, with the following settings:
    a. Leave **Page title** and **Path** alone for now. They will auto-populate with the View name.
    b. **Display format:** Unformatted list of: full posts.
    c. Leave ☑Use a pager checked and the Items to Display at the default.
    d. Check the box to ☑**Create a menu link** and put it in the **Main navigation**.

5. Check the box to ☑**Create a block**, with the following settings:
    a. Change the **Block title** to Latest Testimonial.
    b. **Display format:** Unformatted list **of:** full posts.
    c. **Items per block:** 1

6. Click the **Save and edit** button.

    You can change the Testimonials view on this page, but we're going to move on and place the block.

Placing the *Testimonials* block

7. Click **Structure** in the administration menu, followed by **Block layout**.

8. Find **Sidebar first** and click the **Place block** button.

9. Search for the **Testimonials** and click that **Place block** button.

10. Click the **Pages** tab to the left and type in <front>.

11. Click the **Save block** button.

12. Click **< Back to site** button at the top left side to see what we have accomplished.

Frequently Asked Questions

Q: What is the difference between the Testimonials *page* and *block*?
Q: How do I change settings (fields, sort order, pager, number per page, etc) for the *view* I just created?
Q: How do I create a gallery, slideshow, table, or another way of displaying content?

✔ **You have completed Exercise 4.**

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Extra Credit: Making Testimonials Look Right

It's great that we made the Testimonial content type along with dynamic lists to show that content on our website, but it doesn't look like the wireframes we were given. This is an extra exercise, so you can fix that.

Editing the view

1. Click **Structure**, then **Views**.

2. Find **Testimonials** and click **Edit**.

3. Find **Format: show** and click **Content**.

4. Change to **fields** and click **Apply (all displays)**. Click **Apply** again.

5. Find the Fields section and click the **Add** drop-button.

6. Search for: body . Check the box and click **Apply (all displays)**.

7. Click **Apply (all displays)** again.

   Scroll down and look at the preview. The fields are in the wrong order.

8. Find the Fields section. Click the 🔻 on the drop-button, then click **Rearrange**.

9. Drag the **Content: Body** field above the **Content: Title** field. Click **Apply (all displays)**.

   Scroll down and look at the preview. We're missing the organization field.

10. Find the Fields section. Click **Add** on the drop-button.

11. Search for: organization . Check the box and click **Apply (all displays)**.

12. Click **Apply (all displays)** again.

    Scroll down and look at the preview. Name (title field) should be bold and not a link.

13. Find the Fields section. Click on **Content: Title**.

14. Uncheck ☐ **Link to the Content**.

15. Expand **> Style settings**. Check the box to **Customize field HTML**.

16. Set **HTML element:** Strong.

17. Click the **Apply (all displays)** button.

    Scroll down and look at the preview. Great!

18. Click the **Save** button. Click **< Back to site** in the administration menu at the very top left corner.

✔ **You have completed Extra Credit.**

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Congratulations!

You have completed Getting Started with Drupal.

On behalf of the Developer Relations team at Pantheon, I hope that you enjoyed this three-part series about getting started with Drupal. Know someone else who would benefit from this class or want to take it again next time? You can register here: pantheon.io/getting-started-drupal-9-registration.

Please give me feedback right now while the course is still fresh in your mind. I take suggestions very seriously and are always looking to improve our resources for developers and beginners like you. For more information about this or other training from Pantheon please visit pantheon.io/live-workshops or contact training@pantheon.io for more information, answers to questions, or direct feedback.

Thank you!
David Needham

Additional Resources

There's no one way to learn and some ways work better for some people than others. Here are some great resources to expand your horizons. I'll highlight my top pick from each section.

This workbook: bit.ly/d8workbook

Learn more about Pantheon
- Why Pantheon? pantheon.io/why-pantheon
- Getting Started with Pantheon (45-Minute Webinar): pantheon.io/live-demo
- Pantheon Weekly Live Workshops (every Thursday): pantheon.io/live-workshops
- Pantheon Quick Start Guide: pantheon.io/docs/guides/quickstart
- Pantheon Community: pantheon.io/docs/pantheon-community
- Drupal 9 on Pantheon: https://pantheon.io/docs/drupal-9

Learn more about Drupal
- Drupal Docs: drupal.org/documentation
- Drupal 8 User Guide: drupal.org/docs/user_guide/en/index.html
- Drupal Case Studies: drupal.org/case-studies/featured
- Find Drupal Events: drupical.com

Paid Drupal Training
- Drupalize.Me: drupalize.me
- OSTraining: ostraining.com
- DrupalEasy: Drupal Career Online: drupaleasy.com/dco
- UnderstandDrupal: understanddrupal.com (great Drupal migration training)

Working with Drupal Locally
- Pantheon LocalDev (in early access on Mac!)
- Lando (devwithlando.io), DDEV (drud.com/ddev-local), Docksal (docksal.io)

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"More Resources" and other links from the slides

What is Drupal?
- [What are the new features of Drupal 9?](#)
- [How Drupal 9 was made and what is included](#)
- [Drupal 8 User Guide](#)
- [Drupal case studies](#)
- [Composer](#) // [Composer Fundamentals and WebOps Workflows](#)
- [Drush](#) // [Drupal Console](#) (command-line tools)

Content Management
- Case Study: [German Consumer Centers](#)
- Modules to go further:
  - [Workbench](#): moderation workflows
  - [Admin toolbar](#): new admin menu
- Video lessons
  - [Using Drupal](#) (Drupalize.Me)
- Hiding the "[Trusted Host Settings](#)" error in the Status report (not a concern on Pantheon sites)

Creating Structured Content
- Case Study: [Chicago Park District](#)
- [Drupal 8 User Guide: Chapter 6](#)
- [Available fields in Drupal 8 core](#)
- Video Lessons
  - [Content Types](#) (Drupalize.Me)
  - [Fields](#) (Drupalize.Me)
  - [Paragraphs](#) (OSTraining)

Creating Dynamic Lists
- [Drupal 8 User Guide: Chapter 9](#)
- Modules to go farther:
  - [Views Slideshow](#) (views_slideshow)
  - [Views Infinite Scroll](#) (views_infinite_scroll)
- Video Lessons
  - [Display Content with Views](#) (Drupalize.Me)

Users, Taxonomy, and More
- Case Study: [Lullabot using Layout Builder](#)
- [Drupal 8 User Guide: Chapter 7](#)
- [Extending Drupal with Modules](#)
- [Run Drupal 8 Locally with Lando](#)
- Video Lessons
  - [Users, Roles, & Permissions](#) (Drupalize.Me)
  - [Finding Drupal Modules](#) (Drupalize.Me)
  - [D8 Theming Guide](#) (Drupalize.Me)
  - [D8 Module Dev Guide](#) (Drupalize.Me)

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Drupal Glossary

For more information visit https://www.drupal.org/node/2128535.

block

Blocks are distinct boxes of content visible in the regions of a Drupal website. Most blocks (e.g. recent forum topics) are generated on-the-fly by various Drupal modules, but custom blocks may also be added and placed in a *region*.

Composer

Composer provides a standard format for managing dependencies of PHP software (like Drupal) and required libraries. These are used by Drupal core, as well as it's *modules* and *themes*.

content type

Every *node* belongs to a single "*content type",* which defines the fields available and various default settings for *nodes* of that type, such as whether the *node* is published automatically and whether comments are permitted.

entity

An *entity* is an object in Drupal that defines the fields and interactions available for content. In a way, a *content type* is an entity builder. Examples of *entities*: *node*, *block*, user, comment, and many more.

module

Code (usually PHP and CSS) that extends Drupal features and functionality. Drupal distinguishes between "core" (included when you install Drupal) and "contributed" *modules* you may download from Drupal.org.

node

A single piece of content in Drupal, typically corresponding to a single page on the site, that has a title, an optional body, and perhaps additional fields. Every node also belongs to a particular *content type*, and can additionally be classified using the *taxonomy* system.

region

Defined areas of a page where content may be placed. Basic *regions* include Header, Footer, Content, Left sidebar, Right Sidebar. Different *themes* can define different *regions* so the options are often different per-site. Content is assigned to regions via *blocks*.

taxonomy

Taxonomy is defined as a system of categorization. Drupal uses the *taxonomy* system to create vocabularies that define terms that you can assign to cont (eg. Vocabulary: Music > Term: Rock > Why I love Rock music.)

theme

A collection of files that together determine the look and feel of a site. A *theme* defines *regions* and page templates to create the HTML structure of the website and styles that output with CSS and JS.