Proposal: Drupal 8 User Manual

Summary

The Drupal 8 User Manual provides quality documentation in multiple languages, aimed at helping "Newcomers" or "Learners" to become "Skilled" site builders or site administrators. It is a concise guide to building and administering a typical Drupal site. Therefore, it does not cover everything in Core, but also is not limited to Core modules and references contributed tools like Drush. The manual is written in AsciiDoc: a popular open-source, GPL-licensed, plain-text-with-markdown format. It can be displayed on *.drupal.org or within a Drupal 8 site, and it can be downloaded in PDF and other e-book formats.

The initial version is written and edited by a small group of people, for which funding is required. Ongoing maintenance (for example, for future releases) and further development are done by volunteers through issues and patches to ensure a review process. The Documentation Working Group provides volunteer maintainers for the tool chain and reviewers/committers for the ongoing maintenance.

Main Idea and Requirements

Motivation

Quality documentation in multiple languages has been identified as a key need for the Drupal community. Another key need is for documentation that would help a "Newcomer" or "Learner" persona make the transition to "Skilled".

This proposal would result in a concise Drupal 8 user manual, owned by the Drupal project and licensed consistently with other Drupal documentation, which would serve as a learning tool and could be translated into any language.

Requirements - Content

- The audience is site builders and site administrators at the "Newcomer" or "Learner" level in the new Persona system. The manual provides the information these people would need to become "Skilled" Drupal users.
- The manual covers the tasks that site builders and site administrators would need to build and manage typical Drupal sites: installation, updates, site building, configuration, and administration. These tasks can be in the Drupal user interface, on their hosting/server (e.g., setting up Cron), and possibly with tools like Drush.
- Content selection is based on building/managing typical Drupal sites, not limited to Drupal Core, and not necessarily covering every module of Drupal Core.
- The manual includes background information and terminology as necessary, so it can stand alone without referring to Drupal.org pages or other references.
- The manual is concise, rather than attempting to be a comprehensive guide to everything you can do with Drupal. It does not cover programming, or generic web

topics like information architecture and search engine optimization, but concentrates on how to do the tasks a typical Drupal site builder or administrator would need to do.

The proposed outline for the guide is in Appendix A.

Requirements - Functionality and Technical

The proposed manual:

- Has multiple ways to navigate and find information: table of contents, related topic links, keyword index, search.
- Follows modern technical writing best practices for writing style and splitting the text into small, cross-referenced topics (split into Concepts and Tasks).
- Can be translated into all languages Drupal supports, via localize.drupal.org or at least by the existing language communities.
- Is exportable to PDF as a complete book, and possibly to other e-book formats. Ideally, it should also be displayable (in multi-page HTML format) within a Drupal 8 site and on a *.drupal.org site.
- Stores its source in a Git repository (limited commit access and editorial control).
- Is editable either using a plain text editor, within a Drupal 8 site, or on a *.drupal.org site. The editing mechanism and format should be easy for tech writers who are not necessarily PHP programmers.
- Has standard Drupal content licensing (Creative Commons).

Platform/Technology

There are several options for the technology that could be used to create this manual and satisfy the technical requirements. The proposed solution is to write the manual using AsciiDoc (http://www.methods.co.nz/asciidoc/index.html), which is an open-source, GPL-licensed, plain-text-with-markdown format that is easy to edit and learn, and is used by major players in the commercial technical documentation industry, such as O'Reilly.

Once the source is written in AsciiDoc, it can be processed to various output formats, such as PDF, HTML, and many e-reader formats. It can also be displayed in a Drupal site, using the "AsciiDoc in Drupal" module (which is currently a sandbox project for Drupal 7: https://www.drupal.org/sandbox/jhodgdon/2265553). PDF and e-book document readers generally have search capabilities, and Asciidoc includes capabilities for automatically generating an index and table of contents (from notations in the source), and cross-references between sections. Editing can be done using any plain-text editor; the AsciiDoc in Drupal module also has a visual editor that can be used from a Drupal site, with preview capability.

The source for the manual itself would be maintained in a drupal.org project git repository.

The AsciiDoc in Drupal module would also need to be promoted to Full project status and ported to Drupal 8. The module is fairly simple (AsciiDoc tools do most of the work), so this will not be difficult. Some simple scripts may also need to be developed to process the source

into the various output formats; instructions and sample scripts already exist in the AsciiDoc in Drupal module.

Getting it Done

Initial English Version

We are requesting funding from the Drupal Association for two or more writers and editors to produce the English version of the Drupal 8.0 manual. Given that much of what we would need to cover is already documented on pages under drupal.org/documentation, this job would be partly taking existing material and organizing it into a well-written and consistent manual, and partly writing new documentation if that would require less work for a particular topic. For each section, one person would be writing/compiling, and a second person would be editing.

Budget

Our estimated budget is 100 hours for writing/compiling/indexing, 40 hours for copy and technical editing, and 10 hours for a novice user to test it, based on an approximately 50 page PDF book with an index, and with screen shots included where appropriate. The plan would be to do the novice user testing with volunteers at a sprint, for instance at a DrupalCon.

Translations

The language communities for Drupal would be expected to either translate the manual via volunteer labor, as they now do for Drupal Core and Contributed modules and themes, or request funding from the Drupal Association to translate it.

Ongoing Maintenance

Since the manual will be a standard Drupal.org project, volunteers will be able to file issues and make patches, for smaller updates (like fixing bugs, typos, etc.). They could also contribute new sections, so that the manual can expand over time, although this will need to be managed carefully. The Maintainers will review/commit patches on a volunteer basis, just like other Contrib modules. The Documentation Working Group will provide volunteer maintainers for the tool chain, including the AsciiDoc in Drupal module and any necessary scripts.

For larger updates, like for the 8.1.x or 9.x versions of Drupal, we would probably need to seek funding again, depending on how much of the manual needs attention and updates (i.e., depending on how different the installation process and administrative user interface is between versions).

Appendix A: Proposed Outline

The exact organization and content of the guide is subject to change, but here is the current proposed outline:
- Understanding Drupal (terminology, background of CMS)

- Installation and basic site settings
- Modules and Themes (finding, downloading, installing, uninstalling)
- Updating: minor versions of Drupal Core and modules/themes
- Creating and editing node content, including path aliases and Pathauto
- Navigation: menus, site home page
- Block layout and custom blocks
- Content types and fields, including taxonomy
- Image styles
- Views
- Contact forms
- Non-English sites and multi-lingual sites

Appendix B: Previous Similar Proposals

The idea of a user manual or curated documentation has been discussed several times in the past, with no manual being created:

- The idea of curated documentation has been previously discussed on issue https://www.drupal.org/node/1291058 . Most/all of the main ideas from that issue have been incorporated into this proposal's requirements.
- There was a plan for how to make a system for curated documentation at https://www.drupal.org/node/1095012 and related issues. The main requirements have been incorporated into this proposal's requirements.
- There was also a plan to put the Developer docs into the Drupal Core repository using Asciidoc on https://www.drupal.org/node/2106873 . Most of the requirements and discussion from that proposal have been incorporated here (aside from the ideas specific to the content, which was programmer docs, not a user manual).
- The Configurable Help Module, https://www.drupal.org/sandbox/jhodgdon/2369943, which is currently a Drupal 8 sandbox, allows a module to define one or more help topics as configuration. These topics are imported when the module is enabled, and then can be managed, edited, and viewed within a Drupal site. Topics marked as "top-level" are listed on the admin/help page, and topics can be cross-referenced. This module could be used to build a manual satisfying some of the requirements, but it would be missing a table of contents, keyword index, search, and PDF export.

Appendix C: Survey of Existing Documentation

There are several places that Drupal users can go now to find documentation on how to use Drupal. Each has its strengths and weaknesses, from the perspective of being a manual that would help a Drupal Newcomer or Learner become a Skilled Drupal user.

Community Documentation section on Drupal.org

The Community Documentation section on Drupal.org is fairly comprehensive, and covers site building, administration, theming, and programming.

It has deficiencies:
- It is unmanaged, and therefore of varying quality
- It is huge, so it's difficult to navigate and/or search (besides not being particularly or systematically organized)
- It is only in English, and the size makes translation virtually impossible to contemplate. There is no designation of which pages are particularly important to translate.
- It is not suitable to use as a tutorial, because newcomers would not have any idea of where to start or how to proceed, and the sheer volume is overwhelming.

It is not really feasible to overcome these deficiencies while maintaining the "community" and "anyone can contribute" feeling of this documentation; these aspects are what make it as good as it is (for instance, it's easy for the maintainer of a module or an enthused user of it to add a page/section about their module, and it's easy for someone who notices a lack or error to fix it).

In-Drupal Help

There is some help/documentation available to site builders and administrators available within a Drupal site:
- The Tour module and several Drupal Core tours give you in-page help with some UI pages.
- The Help block gives you top-of-page information about unfamiliar concepts on some UI pages.
- The module references (hook_help() for each module) give you information about what the module does, and the Help page (admin/help) gives you an index to these pages.
- The (for now contrib) Configurable Help module allows modules and themes to provide additional topics beyond their one reference page (if it gets widely adopted).

All of this information is translated/translatable on localize.drupal.org.

Deficiencies:
- The references are organized by module, not by topic/workflow, and there is only one hook_help() topic per module (not multiple topics, and none for themes or install profiles).
- There is no logical order or outline presented, so you can't really use it as a learning tool.
- Writers cannot write this easily. You have to make a patch in PHP code, and it's messy.
- As of this writing, there is not a cohesive strategy for which tours are needed in Drupal Core.

Programmer/Themer references on *.drupal.org

api.drupal.org is a comprehensive API reference for programmers and themers, supplemented by additional documentation on Drupal.org in the module and theme developer

sections. Especially for Drupal 8, this information is in pretty good shape. So programmers and themers who can read English have adequate documentation for Drupal 8.

For that reason, this proposal specifically is aimed at site builders and administrators, not programmers and themers.

Forums, blogs, etc.

Many people choose to write documentation for Drupal on their own blogs rather than contributing it to the Drupal.org community documentation. Also, there are Drupal forums (on Drupal.org, groups.drupal.org, and other-language Drupal sites), as well as Drupal Answers on Stack Exchange, where people can ask questions and get answers.

This information is not organized centrally, and is not generally useful for learning Drupal (not in tutorial format), but can generally be found with an appropriate web search.

Commercially-available books, training, and videos

People that are willing to make the commitment to write comprehensive, in-depth documentation would usually write a book, design training curriculum, or create a video series rather than contribute to the community documentation (they maintain control over its evolution, get some revenue, etc.). So, there are always good books, videos, and paid training available about all aspects of Drupal (site building, security, programming, theming, etc.).

Books are relatively easy to locate. For books in English, drupal.org/books has a listing service, and presumably other-language community Drupal sites could have similar pages for books in their languages. You can also search amazon.com or some other comprehensive book store. Videos and training courses are also somewhat findable on Drupal.org.

Deficiencies:
- The vast majority of the books and videos are in English, and because they are copyrighted, they cannot be translated by willing volunteers into other languages.
- The books and the high-quality video series are not free. The cost could be a barrier for some people in developing countries.
- High-quality training is definitely not free, and may not be available in any particular geographical area or language.
- The books are not integrated into your Drupal site or Drupal.org.

Drupal Ladder and similar projects

Drupal Ladder (drupalladder.org) is a project whose original aim was to create a set of lessons for people wanting to contribute to the Drupal project, primarily programming/patch contributions. The site also has other "ladders" (and a lot of spam!) aimed at learning other aspects of Drupal, but they are not very well developed. The site is only in English.

There have been other attempts to make centralized areas for contributing tutorials, videos, etc., such as Drupal Dojo (which seems to be defunct), etc. None of them has really taken hold.

Appendix D: User Documentation in Other Projects

WordPress

The main user documentation for the WordPress CMS is the "Codex" (https://codex.wordpress.org), which is a MediaWiki-powered, community-written site similar to the Community Documentation in the Drupal project (with similar strengths and weaknesses). They also have a separate developer-centered wiki site at https://developer.wordpress.org/ and an API reference at https://developer.wordpress.org/reference (generated from in-code comments).

The official WordPress documentation team (https://make.wordpress.org/docs -- some of whom are paid staff of Automattic and some of whom are volunteers) is also working on creating a set of curated Handbooks, which currently cover Contributing to the project and a few development topics. They also work on improving the Codex, the in-WordPress help pages, the in-code comments, and the developer documentation.

Wordpress.com (hosted version of WordPress) has a manual at https://learn.wordpress.com/, which covers most aspects of how to set up a blog. This is presumably written by staff.

MediaWiki

The MediaWiki project's web site has http://www.mediawiki.org/wiki/Help:Contents (for end users, covering editing tasks) and http://www.mediawiki.org/wiki/Manual:Contents (covering installation, administration, and upgrades). These guides are fairly concise and organized, even though they are written by the community and edited in a wiki.

phpBB

The phbBB project provides a user guide available in HTML or PDF at https://www.phpbb.com/support/docs/en/. This is written by staff, and covers installation and configuration. They also have a knowledge base that is community contributed, but curated and added to by staff.

Plone

The Plone project documentation located at http://docs.plone.org/ is a good example of curated documentation.

Django

The Django documentation contains a step-by-step guide to building a Django application. The curated guide is easy to follow and helps to lead newcomers through the necessary information in an order that makes sense. The tutorials benefit greatly from the cohesive

example application and one's ability to easily relate current steps to previously explained concepts. https://docs.djangoproject.com/en/1.8/intro/tutorial01/.

Symfony

The Symfony documentation is split into two sections. *The Book*, and *The Cookbook*. Both are highly curated and employ rigid editorial oversight; editing is done via patches and Git. *The Book*, while being more code focused than the proposed Drupal 8 user guides, provides an example of well written and structured documentation that eases the transition from newcomer to skilled Symfony developer. It also illustrates the use-case for version specific documentation, and translation into both French and Italian.

http://symfony.com/doc/2.7/book/index.html