The Big Leap - Picking The Right Drupal journey towards Drupal 10

About Me

- 13+ years of experience in PHP, Drupal and web development

- Drupal Staff Engineer at Axelerant

- Triple Certified Drupal Expert (D8)

- Lead teams of large size from technical front

- Love to travel and explore new places

Axelerant 2020 - Till Now

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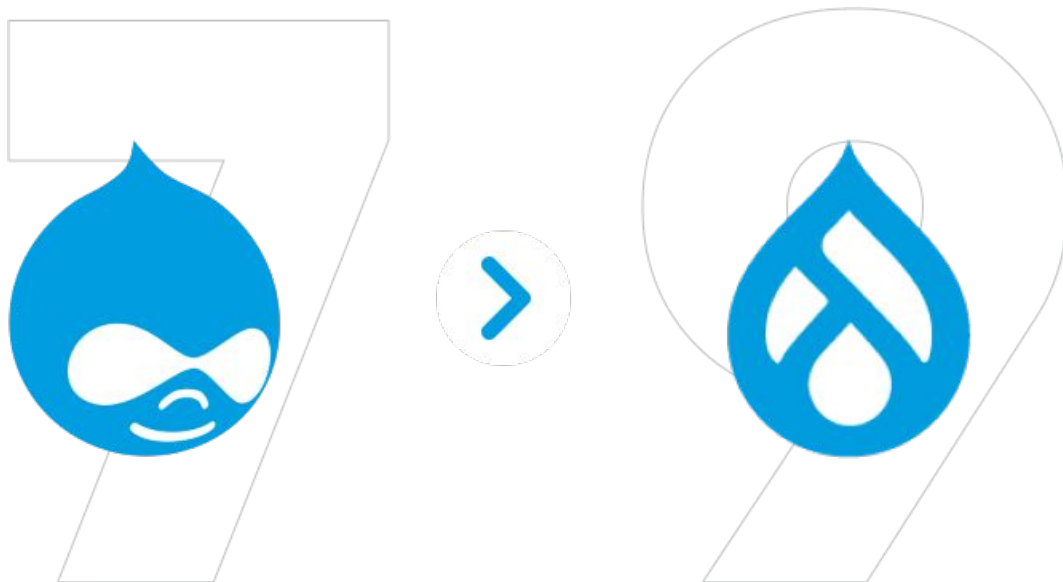
The Big Leap

- Drupal 7 EOL (January 05, 2025)

- Should I still migrate?

- Drupal 10 released

- Why upgrade to Drupal 9+?

  - Drupal 8 EOL reached

  - Better performance

  - Omnichannel support

  - Better editorial experience

  - Flexibility in managing any entity

  - Automatic updates

  - Accessibility

What are the aspects you would want to consider when moving from Drupal 7 to Drupal 9+ ?

Agenda

- Handling the Content types, Taxonomy and Modules first

- Bringing the Roles and Content workflow to work together

- How are we going to manage the media?

- A good time to do some field re-engineering

- Other aspects to consider

- The next step: Documentation

Content types

- Clean slate

- Categorization of content types

  - Content types that solely rely on body field

  - Content types that need rich field sets

- Merge content types

Start asking questions:

- Meaningful changes are driven by asking the right questions

- Content type structure, fields and its usage in current site

Content types - Discovery

Content type	Migrate to D9?	Roles using this content	Usage	Has Internal pages?
Content type name	Do we want to migrate this to D9?	Roles that have access to this content	The extent to which this content type is used as end user pages	Are there pages that are referred from aggregate pages as level 2, level 3 or are these only level 1 pages

Modules, Taxonomy

Categorization of modules

- MoSCoW rules of prioritization

- Required (Must & Should)

  - Core and contributed modules in D7 now in D9 core

  - Actively used contrib modules in D7

- Optional (Could)

  - Not an immediate need

- Revisit the taxonomy

Module	Sub-Modules	Description/question	Type	Entity/Related configuration	D9 Available?	Remove	Replace	Upgrade	Usage
All core modules	Block, Color, Comment, Dashboard, Field, Field SQL storage, Field UI, File, Filter, Help, Image, List, Menu, Node, Number, Options, Overlay, PHP filter, Path, Search, Seven, Syslog, System, Taxonomy, Text, Trigger, Update manager, User		Core	admin/structure/block admin/config/people/accounts Site config will be imported using Migrate Upgrade module	Yes (Core)	☐	☐	☑	M
boxes			Contrib	admin/config/user-interface/boxes	Yes (Core)	☑	☐	☐	S
ckeditor_link			Contrib		No	☐	☑	☐	W
flexslider_views_slideshow			Contrib		No	☐	☑	☐	C
menu_clone		Used for cloning of Menus in Drupal.	Contrib		Yes (Beta)	☐	☑	☐	C
menu_node			Contrib		No	☑	☐	☑	W
minify			Contrib		Yes (Stable)	☐	☐	☑	S
pullquote		Used to highlight specific quotes in a page.	Contrib		No	☑	☐	☐	C
simplehtmldom			Contrib		No	☑	☐	☐	W
emfield			Contrib		No	☐	☑	☐	S
rules	Rules, Rules UI Rules Bonus: Block	Execute specific actions based on events happening in the site.	Contrib	No permissions	Yes (Dev)	☑	☐	☐	W

Roles & Permissions

- Minimal access
- Minimal roles
- User cleanup
- Manual role mapping vs migration scripts

Common issues:

- Too many roles and duplicate permissions available
- Delete permission given to non Admin roles
- Content workflow not streamlined through proper review as required before publishing
- Renaming of roles needed for better clarity

Resonates ?

Roles Vs Content Workflow

- How we use the roles to achieve the content workflow we want matters

- Clean role(s) = Content restriction role + Content moderation role

  - Example:
    - Role A – Create/edit content type A
    - Role B - Create/edit content type B + Publish it
    - Role C - Create/edit content types (A + B)
    - Role D - Create A and B content types + Publish it
  - Alternative:
    - Role A - Create/edit content type A
    - Role B - Create/edit content type B
    - Role C - Publish permissions
    - Any user - Combination of above

Choosing the right module

- **Permissions by Term** - When permissions needs to be given based on categorization

- **Group** - Decentralised control of the site rather than being with user 1 or Administrator role

- Sites with simple workflow - Content moderation in core

- **Workflow** module if already used in Drupal 7

- **Workbench, Workbench Moderation, and Workbench Email** - Need a workflow dashboard and email notification when workflow changed.

- **Trash bin now available** - **Workflow buttons** also provides this feature

Media Management

Start asking questions:

- Does the current Drupal 7 site contains media which is mostly images or is it rich in videos, audio scripts, different type of files?
- What is the future scope of media in the site in Drupal 9 ? Are we expecting the site to be media-rich with lots of metadata?
- Do we need the same field to store different types of media?

Take this as a chance to re-evaluate the way media is stored and future need for the site

Below are the options available:

- Same approach as in Drupal 7

- Leverage media module

- Custom media types with metadata as per need

Media - Supporting modules and references

- Simple Image/Video/File field path - **File Entity Browser** to browse files

- Media field in Drupal core - organize media with **Media Directories** module, **Bulk Upload** to upload a lot of files in one go

- **Media Directories** module provides only virtual directories and is not physical mapping to actual directories in the file system. **Work in progress** for the same.

- Drag and drop support **now available** for the media library.

What kind of field Re-engineering can be done?

- **Goal**
  - Relook the data types of each field and validate if we using them effectively

- **Examples**
  - Plain text instead of Date field, CkEditor instead of plain text, List (Text) instead of taxonomy

- **Solution**
  - Move to optimal field types in the new Drupal 9 site if they are compatible with existing data

- **Benefit** - Improved editorial experience, optimised DB storage, better UX

Other aspects to consider

- Integrations available

- Any field name changes to be done in content types?

- Any new fields to be added for better representation of content?

- Any field settings needs to be added/changed like default value, required, etc…

- What are the things to be considering when doing the migration? e,g. any
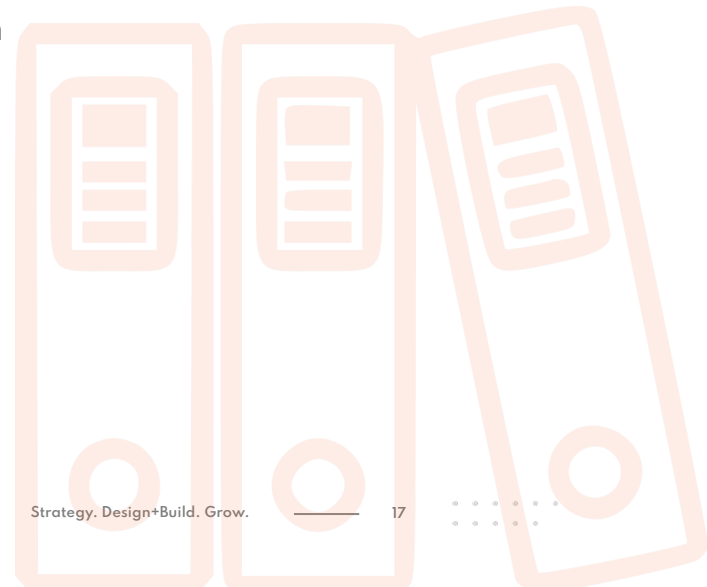 pre-processing needed?

The next step: Documentation

- We must document the above aspects as it clearly says the decision and route we take which would provide clarity for the team working on the migration.

- What to document?

  - Every decision made and why we made the decision

The next step: Documentation

Content Type Title

Created by Kalaiselvan Swamy
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Brief Description

<The objective of this content type, what its purpose, a short description>

Field Level Requirements

<A link to a field level requirement sheet that shows the D7 fields and its corresponding D9 fields with properties>

<Discussions around each field and decision made>

Content Retention Policy

<How far back we want to migrate the content? Only published or un-published too?>

Aggregation/aggregate page(s)

Mechanism: How the content type should be grouped in aggregate pages?

List of aggregate pages:

<The list of pages where this content type would be shown in aggregated form>

Sorting:

What is the order of sorting for content based on which field in content type?

Filtration and drill down

<How user can filter these content types and drill down on their search in aggregate pages?>

Full view Design

<How should the full view of this content type be shown? What fields and its design?>

Migration Considerations

<What fields should be migrated?>

<Any re-engineering/preprocessing needed for certain fields?>

<Any conditions based on which the migration should happen?>
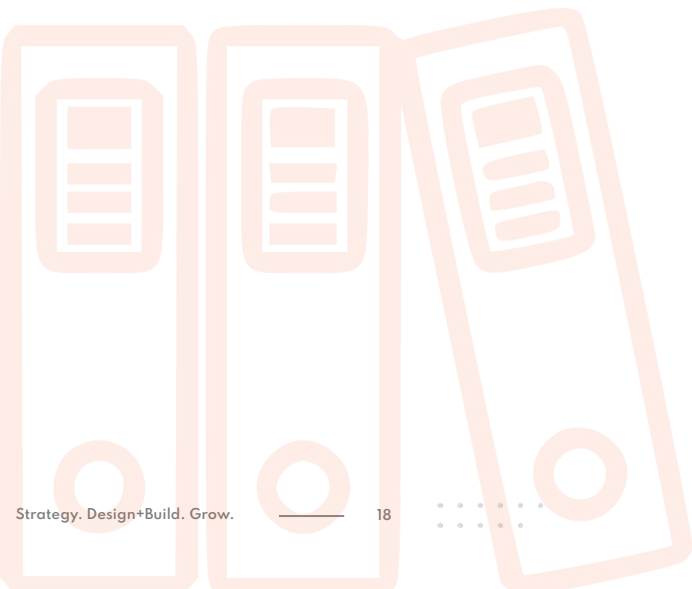
Assumptions

<Give details on the various assumptions made for this content type>

References

<Any references for making above decisions and for this content type, like slack discussions, emails, etc...>

Questions & Feedback

Thank You

Strategy. Design+Build. Grow.